



veeva Network

Veeva Network 18R1.0.1 Release Notes

April 2018



Contents

- About these Release Notes..... 7**
- Browser requirements..... 7**
- Process change for release and maintenance notifications 7**
 - Network Product Community..... 7
 - Network Release Notes 8
- Release Note updates..... 8**
- What's new 9**
- Introduction 12**
 - Network Customer Master 12
- Profile 13**
 - New profile 13
 - Highlights of changes 14
 - Summary section 15
 - Condensed summary 17
 - Sample Eligibility 17
 - Compliance Data 18
 - Network Explorer 19
 - Revision History 19
 - Data Lineage 20
 - Find Suspect Match..... 20
 - Profile sections..... 21
 - Child object sections 21
 - Addresses 23
 - Parent affiliations..... 27



- Child affiliations 29
- Licenses 29
- Custom child objects 33
- External Identifiers 34
- Sections with no changes 35
- Editing profiles 35
- Field level revision history 37
 - Accessing the field revision viewer 37
 - Viewing field revision history 39
 - Default columns 39
 - Customizing fields in the viewer 42
 - Exporting revision history 43
- Send add requests to Veeva OpenData 43
 - Set user permissions 43
 - Sending records 44
 - My Requests 45
 - Add requests 45
- My requests 46**
 - Requester comments 46
 - Rejected status 47
 - Resolution notes 47
 - Filter by status 47
- Search 48**
 - Advanced search 48
 - Accessing advanced search 48



Highlighted fields	48
Searching by entity type	49
Objects identified on filters.....	49
Double quote support for Chinese keyboard users	49
Inbox.....	50
New column.....	50
Select multiple filters.....	50
Reports	51
Advanced queries	51
Revision history reports.....	51
Reporting schema	51
Example.....	53
Data quality reports.....	54
New Zealand entity groups	54
New Zealand test cases.....	55
Australia and New Zealand test cases.....	55
Australia test cases	55
Activate entity groups and test cases	56
Data export	56
Subscription delta	56
Data model	57
Managing clusters - enhancements in 18R1.0.....	57
Supported cluster providers	57
Job Details	57
Address verification	59



- Configuration management 59
- Overriding codes 59
- Managing clusters..... 60
 - Supported cluster providers 60
 - Supported records and fields..... 60
 - Data model updates..... 60
 - Managing cluster settings 61
 - Manually refreshing addresses 63
 - Job details 64
 - Profile updates 64
 - Events that trigger cluster code calculation by Network 65
 - Overriding cluster codes 66
 - Reverting overridden cluster codes 70
 - Logs 71
- Custom child objects – enhancements in 18R1.0..... 71
 - Managing configurations 71
- Custom child objects 72
 - Using the standard Network data model..... 73
 - Create a custom child object..... 73
 - Enable and configure custom child objects 73
 - Export the data model 81
 - Load data for custom child objects 81
 - Job details 84
 - Feature considerations for custom child objects 86
 - Features that do not yet support custom child objects 96



Removing custom child objects	96
Limitations of custom child objects	96
Alternate key survivorship	96
Define survivorship rules	97
Supported merge actions.....	98
Tiebreaker rules	100
Disabling dependent fields.....	101
Fixing alternate keys from a merge.....	101
Data privacy opt-out	102
General updates	103
Amazon Web Services migration	103
Security updates	103
Browser Support.....	103
API	104
Filtering Mail Only addresses.....	104
Filter addresses	104
API updates for custom child objects	105
Metadata API	105
Retrieve Merge/Unmerge API	106
Retrieve Merge API	107
Retrieve Unmerge API.....	109
Reserved Network entity ID.....	111



About these Release Notes

These Release Notes describe all features that are included in Veeva Network 18R1.0.1.

Browser requirements

The following are the minimum browser requirements:

- Internet Explorer™ 11+
- Google Chrome™ (most stable version at Network release)
- Safari® 10+

Veeva Network is not supported on mobile devices.

Process change for release and maintenance notifications

As of February 1, 2018 Veeva is no longer managing lists for release and maintenance notifications.

To receive these types of notifications, go to trust.veeva.com and subscribe to notifications for the Network product. At the top of the page, click **Subscribe to Veeva Trust Site**.

For more information, see <https://support.veeva.com/hc/en-us/articles/115004142714-How-to-Opt-In-to-System-Availability-Notifications->.

If you have questions or require additional details, contact Veeva Support.

NETWORK PRODUCT COMMUNITY

Users can follow the Network Community on Veeva Support for announcements about releases, webinars, Q&A, and tips.

To follow the community,

1. Log into Veeva Support: <https://support.veeva.com>.
2. In the Network box, click **Community**.



Network

Knowledge

Community



3. The community includes the following areas of interest:
 - Network Announcements
 - Network Q&A
 - Network Product Suggestions
 - Network Tips & Tricks

Select each topic that you're interested in. On the topic page, click **Follow**.

You will be notified when new topics are added to the section.

NETWORK RELEASE NOTES

To receive notifications when Release Notes and Data Governance documents are published for each release, follow this page: <https://support.veeva.com/hc/en-us/sections/203656118-Network-Release-notes>.

Release Note updates

The following feature has been added to the Release Notes since the Early version was published:

- **Revision history reports** - Users can now report on revision history for records using advanced ad hoc queries.

The following changes have been made to the Release Notes since the Sandbox version was published:

- **Revision history data** - Viewing all available historical data will be delayed in some Network production instances for field level revision history and revision history reports. Over the next few weeks, all historical revision data will be added to your Network production instance.

All material in the Release Notes should be reviewed to ensure that updates to existing topics are noted.



What's new

The following key enhancements comprise the Veeva Network 18R1.0 major release. For each feature, the release version and Network users that benefit from each feature are indicated.

18R1.0 - Features newly released for 18R1.0

17R3.x - Features previously introduced in minor releases (17R3.1 and 17R3.2).

Users: Standard users (ST), data stewards (DS), data managers (DM), and administrators (AD).

			ST	DS	DM	AD
Profile						
New Profile	The Profile page has been redesigned so users can more easily find relevant information when viewing US records.	18R1.0	●	●	●	●
Field level revision history	Network users can now investigate field-level changes from contributing sources in a concise format directly from the Profile page.	18R1.0	●	●	●	●
Send locally managed records to Veeva OpenData	Data stewards can now route local records to Veeva OpenData as an add request.	18R1.0		●	●	●
Search						
Advanced search	Usability improvements have been made to help users find records more efficiently.	17R3.x	●	●	●	●
My Requests						
Requester comments	The Description column has been renamed to Requester Comments and displays comments made by the user who submitted the DCR.	18R1.0	●	●	●	●
Rejected status	The Status for DCRs that were not approved is now Rejected; previously, the status was Denied.	18R1.0	●	●	●	●
Resolution notes	A new column on the My Requests page displays the resolution notes from the DCR.	18R1.0	●	●	●	●
Inbox						
New column	A Task ID column is now available so inbox users can easily view the ID without opening the DCR.	18R1.0		●	●	●
Multiple filter selections	Inbox users can now make multiple selections in the Task Status, Country, and Source System filter lists.	17R3.x		●	●	●
Reports						
Advanced queries	Users can now add comments to ad hoc queries.	18R1.0			●	●



			ST	DS	DM	AD
Revision history	Users can now report on revision history for records using advanced ad hoc queries.	18R1.0			●	●
Data quality reports	Test cases and entity groups are now available for New Zealand data and new test cases have been added for Australian data.	17R3.x			●	●
Data model						
Cluster management	Enhancements have been added to this feature to support additional providers, configuration management, and cluster code calculation during address verification. Improvements have also been made to the job details.	18R1.0			●	●
Custom child objects	Administrators can now include custom child objects in configuration exports.	18R1.0			●	●
Cluster management	Addresses can now be updated with cluster information for specific countries and cluster providers.	17R3.x			●	●
Custom child objects	Administrators can now create custom child objects to store profile information about HCPs and HCOs.	17R3.x			●	●
Alternate key survivorship	Administrators can define logic so Network knows which alternate key to keep when records are merged.	17R3.x			●	●
Data privacy opt-out	New Zealand has been added to the list of countries supporting opted-out records.	17R3.x			●	●
Data export						
Export options	When changes are made to the subscription filters, administrators can now choose the level of records to export.	17R3.x			●	●
General updates						
AWS migration	Veeva Network PODs are migrating to Amazon Web Services (AWS).	18R1.0				●
Site certificate update	As part of the 17R3.2.1 release, the SSL certificate for <i>veevanetwork.com</i> has been updated.	17R3.x	●	●	●	●
Browser support	Performance improvements have been made for Internet Explorer 11.	17R3.x	●	●	●	●
API						
Filtering Mail Only addresses	Administrators can now ensure that mail only addresses are filtered from the Search API.	18R1.0				●
Version	The Network API is updated to v14.0.	17R3.x				Developers
Custom child objects	Custom child objects are supported for the Retrieve and Metadata API for Network API version 13.0 and	17R3.x				Developers



ST DS DM AD

	higher.		
Retrieve Merge and Unmerge	The Network API now includes methods to retrieve merges and unmerges for a specified date.	17R3.x	Developers
Reserving Network entity IDs	The Change Request API is updated so that a VID can be immediately provided when an add request is submitted.	17R3.x	Developers

Data Governance - Specific updates for fields and reference data are provided in the *Veeva Network Data Governance* release notes for every minor and major Network release.

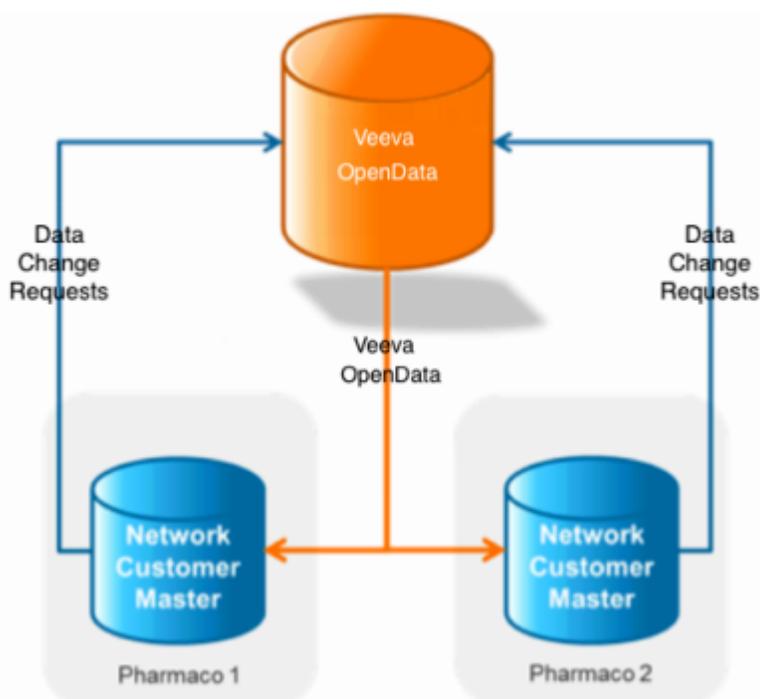


Introduction

Veeva Network includes Network Customer Master, and for applicable countries, Veeva OpenData Customer Data.

Veeva OpenData provides identity, demographic, and licensure data about Healthcare Professionals and Healthcare Organizations.

Network Customer Master is a SaaS Master Data Management (MDM) application that is populated with a subset of the data from Veeva OpenData, according to each pharmaco's contract with Veeva.



NETWORK CUSTOMER MASTER

Veeva Network Customer Master is a multi-tenant SaaS Master Data Management (MDM) application. Each pharmaco that subscribes to Veeva Network has its own Network Customer Master tenant (often referred to as a Network org similar in concept to a Veeva CRM or Salesforce.com org).

Where Veeva OpenData is enabled, each Network org comes pre-populated with data from the Veeva OpenData databases to which the pharmaco has subscribed. Veeva Network automatically keeps the data in each production Network org up-to-date and in sync with the data in Veeva OpenData.

Pharmacos can also load their own data into their Network org and match and merge it with the Veeva OpenData data. Veeva is responsible for stewarding the quality of the Veeva-provided data as well as any new records added in the Network org that can be shared with Veeva OpenData.

Records that do not match Veeva records will be loaded as customer-stewarded records and updates on those records will not be shared with Veeva OpenData.



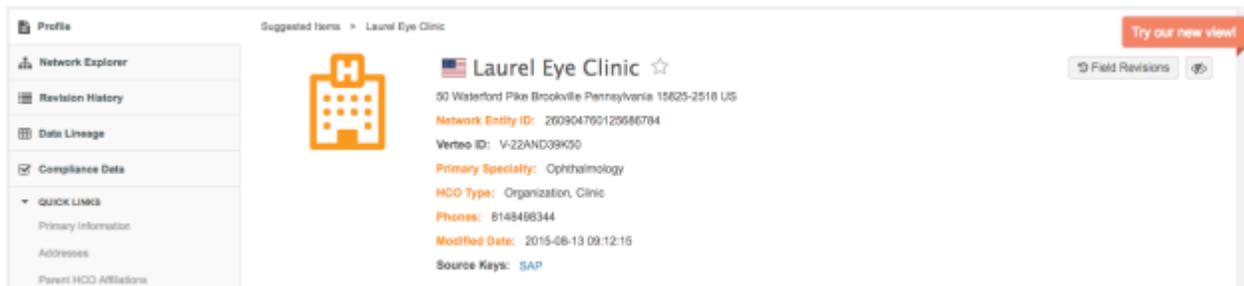
Profile

NEW PROFILE

The Profile page has been redesigned to help Network users more easily find relevant information and to quickly get insights about a record; for example, sample eligibility, parent affiliations, and record versions. Records can be edited directly on the redesigned page. Users can easily switch back to the classic layout by clicking **Back to Classic View** at the top of the page.

The classic view of the profile will be removed in a future version.

To view the new profile from any US record, click the red ribbon on the right corner of the page. The red ribbon displays on any record where the primary country is the US.



The redesigned Profile page displays for that record. Network retains your choice to view the redesigned profile as you view other US records and even when you log out and back into the application.



Search (term: laurel) > Laurel Eye Clinic Back to Classic View | Field Revisions

Laurel Eye Clinic ☆ Veeva Managed

50 Waterford Pike Brookville PA 15825-2518

PRIMARY SPECIALTY Ophthalmology

HCO TYPE Organization, Clinic

+1 814-849-8344

+1 814-849-7130

VID 260904760125686784

Primary Information

Addresses

Parent HCO Affiliations

Child Affiliations

General Information

External Identifiers

Licenses

EMR Information

Studies

Studies

Custom Fields

Record Information

Primary Information

Corporate Name *	Network Entity ID	
Laurel Eye Clinic	260904760125686784	
Primary Country	HCO Type	
United States	Organization, Clinic	
Major Class of Trade	AMA Do Not Contact?	
Organization	No/False	
Status	Record State	
Active	Valid	
Emails	Websites	
+ Add Email	http://www.laureleye.com/brookville/eye-clinics.htm#Altoona_Office	
	WWW.LAUREEYE.COM	
Roster Date	340B Eligible?	
2014-09-29	No value	

Addresses

50 Waterford Pike Brookville PA 15825-2518 verified

Professional

[Show Map](#)

SAMPLE ELIGIBILITY

No active sample eligible licenses

No states eligible to sample

COMPLIANCE DATA

✓ NPI, DEA

NETWORK EXPLORER

[Open in Network Explorer](#)

REVISION HISTORY

- 🔄

Update from source

2015-08-13
- 🔄

Update from source

2015-04-09

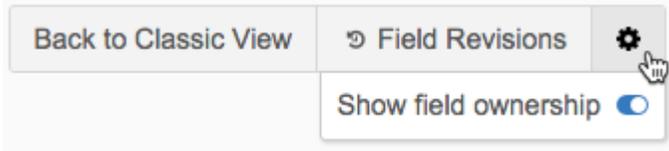
Highlights of changes

The Profile page was redesigned to improve usability. The changes will help users to quickly find information at first glance.

- **Summary section** - New details have been added to the summary so that users can find the most relevant information as soon as the record displays. The section also condenses to a fixed header that displays when users scroll, so they can always see the entity name and key details.
- **Field ownership** - By default, field names on the new profile indicate ownership by color. If a user edits the field, they will know where the DCR will be routed.
 - Orange - Veeva OpenData
 - Gray - Customer
 - Blue - Third party



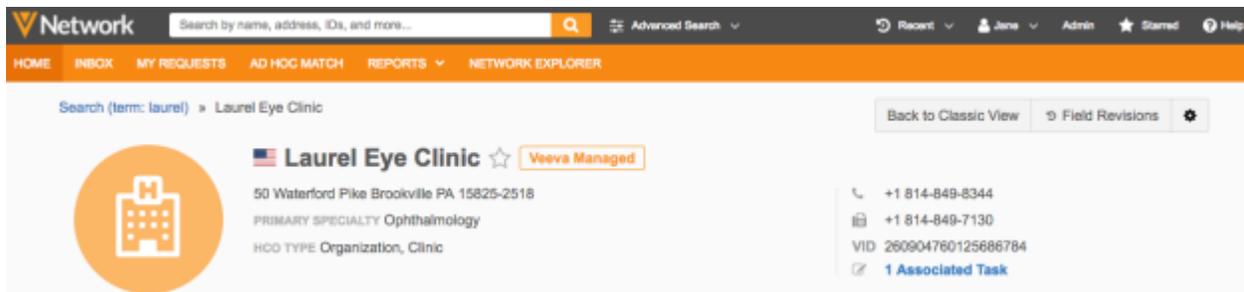
If you prefer to view the profile without the field ownership colors, you can hide the colors using the **Options**  menu at the top of the page. For example, if differentiating custom fields from Veeva OpenData fields is not essential when you are browsing profiles, you might want to remove the field ownership colors.



- **Field Revisions** - Users can access a popup that displays the field revisions for all entity-level data model fields. Field revisions are also available for each child object in the respective sections in the profile. For more information about field revisions, see the *Field level revision history* topic in these *Release Notes*.
- **Preview boxes** - New preview boxes for **Compliance Data**, **Network Explorer**, **Revision History**, **Data Lineage**, and **Find Suspect Match** replace the links that were in the left navigation in the classic view. These boxes display a summary so that users can quickly view details without leaving the profile. A **Sample Eligibility** box also displays so sales reps can easily identify if they can drop samples for the entity.
- **Summary cards** - The **Addresses**, **Parent HCO Affiliations**, **Child Affiliations**, **Licenses** sections now contain summary cards for each child object. The card provides the most relevant information, but users can click the card to expand the object for more details. In the **External Identifiers** section, expandable cards display for each custom key on the record.

Summary section

The new profile contains an updated summary that provides the most relevant information about the HCP or HCO, so users don't have to search for the information in different sections.



The following fields can display in the summary:

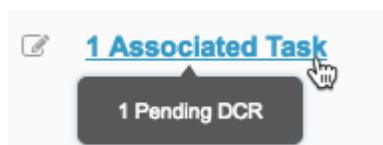
- **Breadcrumb** - Use the links to easily navigate back to the location you came from
- **Primary country** - A flag displays beside the entity name so that you can quickly identify the primary country of the entity.
- **Starred records** - Click the star to select this record as one that you regularly view. Starred records can be easily accessed from the Starred list on the Network menu bar.



- **Record ownership** - A tag displays beside the entity name to indicate ownership: **Veeva Managed**, **Locally Managed**, **Externally Managed**, or **OpenData Managed** (record is available for download from OpenData).
- **Primary address** - The entity's most relevant address displays. If the Primary Address feature is enabled in your Network instance, this is the address that has been defined as the primary. If the Primary Address feature is not enabled, this is the highest ranked address (`ordinal__v = 1`) for the entity.
- **HCP Type or HCO Type** - The type (for example, prescriber, nurse, clinic) displays.
- **Degree** - The HCP's first degree.
- **Primary specialty** - The therapeutic area that the entity specializes in displays.
- **NPI number** - The National Provider Identifier of the entity.
- **Download from OpenData** - The record is available for download from Veeva OpenData and the user's data visibility profile gives them permission to download. If users do not have permission through their data visibility profile, the message **Need download permission** displays.



- **Email** - Email addresses are now immediately available when you view the profile; users do not have to scan through other fields to find the information. One email address (`email_1__v`) and a count of any additional email addresses displays. Click the count to scroll to the **E-Contacts** section to view the others.
- **Phone number** - a phone number and a count of any additional phone numbers on the first address. Click the count to scroll to the **Address** section where the next populated phone field (for example, `phone_2__v`) is located on the first address.
- **Fax number** - a fax number and a count of any additional fax numbers on the first address. Click the count to scroll to the section where the next populated fax field (for example, `fax_2__v`) is located on the first address.
- **VID** - The Network entity ID assigned to the HCP or HCO.
- **Associated tasks** - A count of all pending tasks for the entity. Hover over the link to see the breakdown of pending DCRs and suspect match tasks.



Click the **Associated Task** link to view a summary of the tasks.



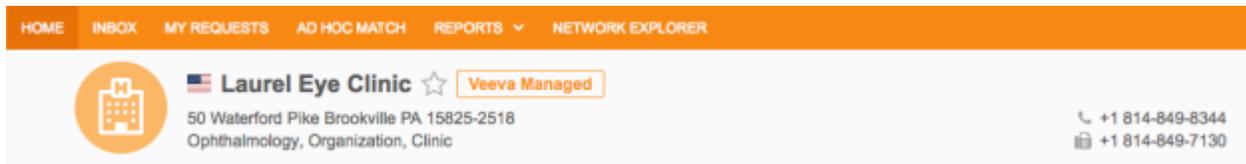
Associated Tasks (1)

1 Pending DCR

TASK ID	TYPE	SUMMARY	STATUS	SERVICE TIME
849608565067876352	Change Request	Change Major Class of Trade and 3 other fields	Pending Review	59 Hours

Condensed summary

When users scroll past the **Summary** section to view the information in the sections below, the **Summary** becomes a condensed header so that you can always see the entity information.



The following information displays in the condensed header for each entity type:

HCP

- Entity icon
- Country
- Record owner tag
- Record status
- HCP name
- Primary address for the record
- Primary specialty
- HCP type
- Degree
- Phone
- Email address

HCO

- Entity icon
- Country
- Record owner tag
- Record status
- HCO corporate name
- Primary address for the record
- Primary specialty
- HCO type
- Phone
- Fax

Sample Eligibility

A new **Sample Eligibility** preview box displays near the top of the Profile page so that sales reps can quickly find SLN and DEA license information before visiting an HCO or HCP. The box also identifies if the entity has sanctions.



The preview box contains the following information:

- **Active Sample Eligible SLN Licenses** - Displays the first active sample eligible SLN license and a total count for the remaining sample eligible SLN licenses.

A license is sample eligible if `rxa_eligible__v` is *Eligible* (E), license status (`license_status__v`) is *Active* (A), license type (`type__v`) is *State* (STATE), the grace expiry (`grace_period__v`) is defined and the grace period is in the future.

If there are no SLN numbers, the following message displays: *No active sample eligible licenses.*

- **States** - A list of the states that the entity is eligible to sample in. If there are no SLN licenses for the HCP or HCO, the following message displays: *No states eligible to sample.*
- **DEA** - A DEA license check mark displays so users can quickly know if they can ship controlled substances to an HCP. If no DEA licenses exist for the entity, this row does not display.
- **Sanction exists** - If at least one sanction field is populated for an entity, this link displays to indicate that sanctions exist on the record.

SAMPLE ELIGIBILITY

 MS 22646, **+1 active sample eligible license**

 States eligible to sample:
MS, NJ

Compliance Data

The **Compliance Data** preview box displays the applicable data for each entity type:

- HCP - NPI, DEA, Massachusetts (MA) CRI, and SLN data (no more than 4 sources)
- HCO - NPI, DEA and CMS Teaching Hospital data (no more than 3 sources)

COMPLIANCE DATA

 **NPI, DEA**

Click a link to scroll to the source section on the Compliance Data page.

This preview box displays if the US Compliance feature is enabled in your Network instance and the primary country of the record is the United States (US). This box does not display on Veeva OpenData records that have not yet been downloaded to your Network instance.

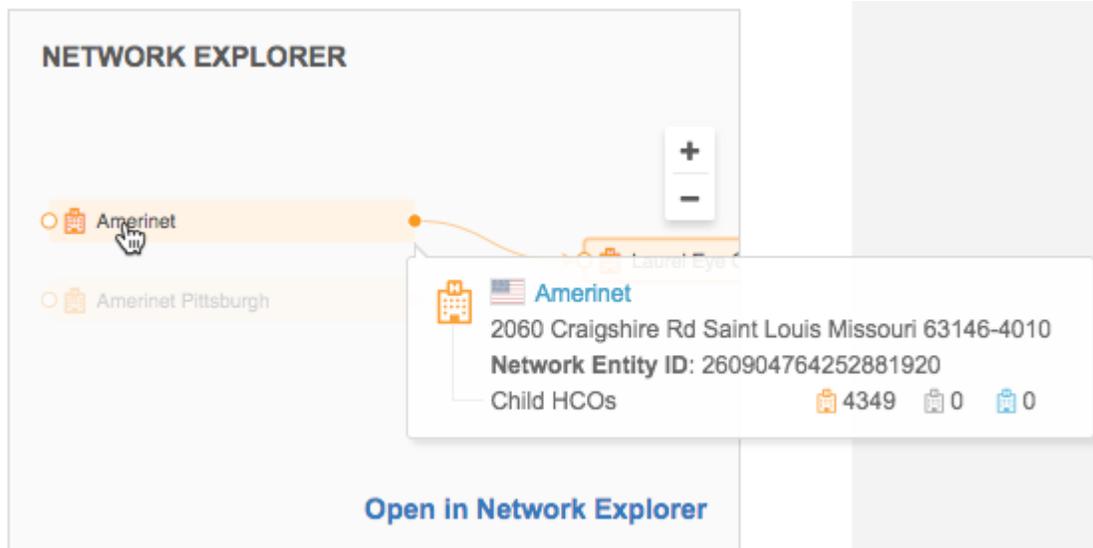


Network Explorer

In the **Network Explorer** preview box, users can view and access the parents and children in this entity's hierarchy.

Within the preview, users can access affiliations in the following ways:

- Click an affiliation to view a summary of the record. Clicking the entity's name in the summary opens the profile in a new browser tab.

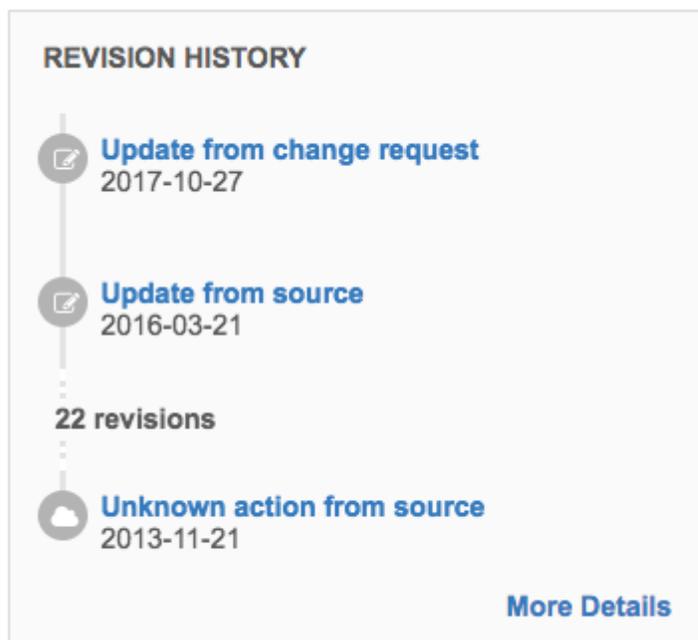


- Click **Open in Network Explorer** to view and access the affiliations from the Network Explorer canvas.

Tip: Right-click on the link to open Network Explorer in a new tab.

Revision History

In the **Revision History** preview box, users can quickly identify if the profile is reliable, up-to-date, and does not have underlying data issues. The two most recent record changes and the record creation date display in the box and can be clicked to view more details. The total count of revisions, between the record creation and most recent changes, is helpful to understand how often a record is changing; frequently changing records often have underlying data issues or conflicting sources.



REVISION HISTORY

-  **Update from change request**
2017-10-27
-  **Update from source**
2016-03-21
- 22 revisions
-  **Unknown action from source**
2013-11-21

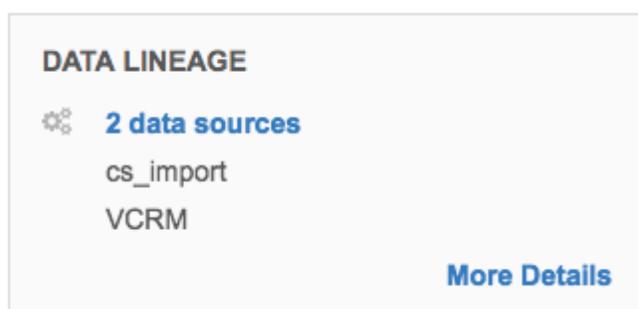
[More Details](#)

Click **More Details** to navigate to the Revision History page.

Tip: Right-click on the link to open the Revision History page in a new tab.

Data Lineage

The **Data Lineage** preview box lists the data sources that contributed to the record. Click **More Details** to navigate to the Data Lineage page to review the sources in detail.



DATA LINEAGE

-  **2 data sources**
 - cs_import
 - VCRM

[More Details](#)

This box does not display on Veeva OpenData records that have not yet been downloaded to your Network instance.

Find Suspect Match

This preview box displays for data stewards and data managers so that they can set suspect matches for the record profile that they are viewing. The box displays on records that are local to the Network instance.



In the text field, data stewards or data managers can type a search term or a Network entity ID (VID), or both, and navigate to the search results page to choose records to complete the suspect match task.

FIND SUSPECT MATCH

Profile sections

The new profile page contains the same sections of information as the classic view. A navigation bar on the left side enables users to quickly scroll to a specific section.

- Primary Information**
- Addresses
- Parent HCO Affiliations
- Child Affiliations
- General Information
- External Identifiers
- Licenses
- EMR Information
- Studies
- Custom Fields
- Record Information

Primary Information

Corporate Name *	Network Entity ID
Laurel Eye Clinic	260904760125686784
Primary Country	HCO Type
United States	Organization, Clinic
Major Class of Trade	AMA Do Not Contact?
Organization	No/False
Status	Record State
Active	Valid
Emails	Websites
+ Add Email	http://www.laureleye.com/brookville/eye-clinics.htm#Altoona_Office
	WWW.LAURELEYE.COM
Roster Date	340B Eligible?
2014-09-29	No value

Child object sections

The **Addresses**, **Affiliations**, and **Licenses** sections have been redesigned so that information can be retrieved quickly and easily. In each section, summary cards display for all related child objects. The summary cards provide the most relevant information for users and can be expanded for more details. Click the summary card again to collapse the details.



Badges might display on the summary card to give users information that they should immediately know about the child object. For example, the **Sample Eligible** badge might display on an SLN license so users can immediately identify if samples can be dropped for that license.

The number of badges that can display on one summary card depends on the child object. For more information, see the *Addresses*, *Parent Affiliations*, and *Licenses* sections.

Child objects that have been defined as primary for a business unit are easily identified on the summary card. User-defined primaries (Unique Checkbox) are displayed as a count on all child objects that have been set to primary. Network Calculated primary badges display on Parent HCO and address child objects that are set to primary. For more information about primary child objects, see the *Veeva Network Online Help*.

Adding child objects

In each section, a new card (for example, **+ New Parent Affiliation**) enables users to add a new child object. Click the card to expand it and view the placeholder summary information and fields to complete. The new cards are not available on Veeva OpenData records that have not been downloaded into your Network instance, or if your data visibility profile provides read-only permissions on the profile.

In the expanded card, fields that have default values in the data model are populated; for example, **Status** fields.



 **- Corporate Name -**
- Address -
- Relationship Type -
- Hierarchy Type -

 Corporate Name *	 Hierarchy Type
<input type="text"/>	<input type="text"/>
 Relationship Type	 Parent Type
<input type="text"/>	<input type="text"/>
 Status	 Primary Relationship?
<input type="text" value="Active"/>	<input type="text"/>
 340B Contract Number	 Start Date
<input type="text"/>	<input type="text"/>
 End Date	 Demo ID
<input type="text"/>	<input type="text"/>

See the *Addresses*, *Parent Affiliations*, and *Licenses* sections below for specific information on adding those child objects.

Addresses

Each address associated with the entity has a summary card. The summary includes the formatted address, address verification status (for example, Verified), address type, primary indication for business units, and a DEA license if it is associated with the address. The most important addresses are listed first, for example, the address that is set as the primary for the entity and then the address that is ranked the highest.

The following badges might display on an address summary card to give users relevant information about that object:

- **Primary** - Displays when the address has been set to primary.
- **DCR** - Displays when a DCR has been submitted and is pending review on the address or it is part of a multi-child object DCR.
- **Under review** - Displays when the address's record state is *Under Review*.



- **Inactive** - Displays when the status of the address (`address_status__v`) is *Inactive* (I).

 **50 Waterford Pike Brookville PA 15825-2518** verified
Professional
Primary for 1 business unit Primary

 **4240 Fieldstone Dr Easton Pennsylvania 18045-2364 United States** verified
Professional
License **FC4423187**

 **PO Box 909 Picayune Mississippi 39466-0909 United States** verified
Professional
License **BC9108691** DCR Under review

[+ New Address](#)

[Show inactive addresses \(6\)](#)

[Show Map](#)

Click a summary card to expand it and view more information.



50 Waterford Pike Brookville PA 15825-2518 ✓ verified
Professional



Address Type
Professional



Record State
Valid



Address Line 1 *
50 Waterford Pike



Address Line 2
No value



Address Line 3
No value



City *
Brookville



State/Province
Pennsylvania



Zip/Postal Code
15825-2518



Country
United States



Status
Active



Address Verification Status

[Verify](#) ⓘ



Address Rank
1



Phones
8148498344

[+ Add Phone](#)



Faxes
8148497130

[+ Add Fax](#)



Network Entity ID
260905149566813202



Demo ID
NULL



Appointment Required?
No value



Global Primary Address
No value



Oncology Primary Address
No value



Custom Keys
MASTER_v



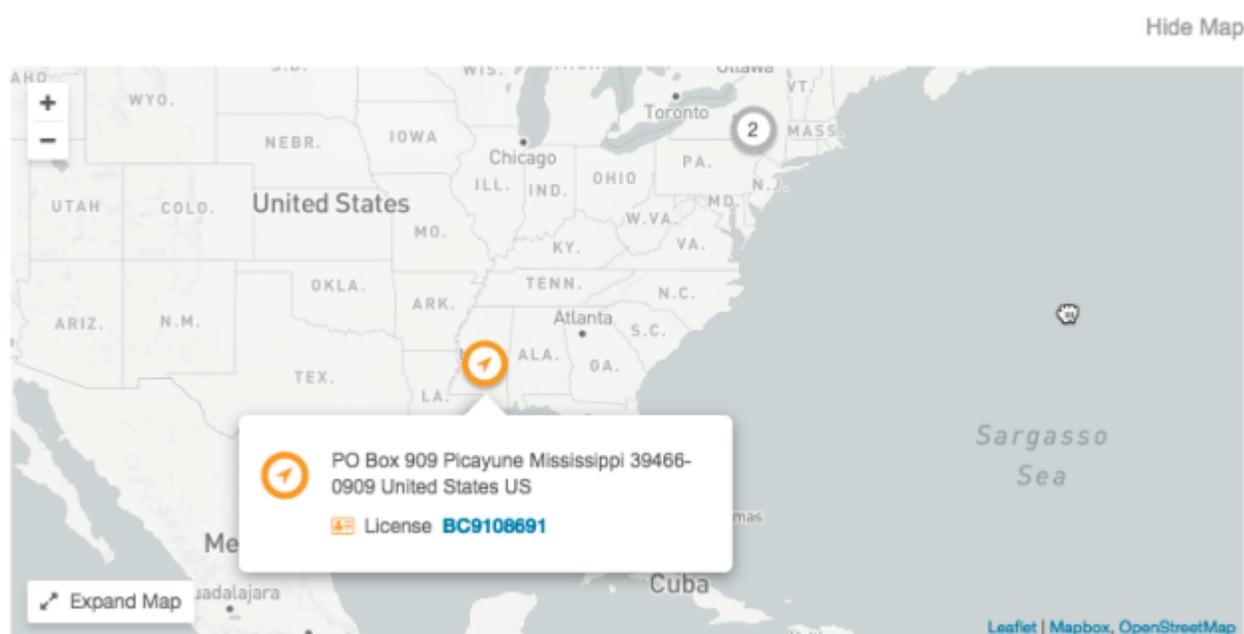
Click **Address Field Revisions** to quickly investigate field-level changes from contributing sources. For more information, see *Field level revision history* in these Release Notes.

Address map

The map is hidden by default. To display the map, click **Show Map**.

Each address is pinned on the map. Inactive addresses display on the map if users click the **Show Inactive Addresses** link below the summary cards. Seeing inactive addresses can help users identify duplicate addresses.

Click a pin to open a business card to view the address and the DEA license (if applicable) for that pin. If multiple DEA licenses are associated with an address, the first license details are followed by a count of additional licenses.



Adding addresses

To add an address, click **+ New Address**. Add values for **Address Line 1**, **City**, and any other fields. When you have finished your changes, click **Apply** in the floating bar at the bottom of your browser window.

Use the **Verify** button to cleanse the new address. The **Not Verified** and **Overridden** address verification statuses are hidden by the **Verify** button. When you verify an address, a pin is available after **Apply** is clicked in the address verification popup.



Parent affiliations

This section displays the parent HCOs for the record. The summary card contains the corporate name, address, and relationship type. The most important affiliations are listed first, for example, the affiliation that is set as the primary affiliation for the entity.

The following badges might display on a parent affiliation summary card to give users relevant information:

- **Primary** - Displays when the parent affiliation has been set to primary.
- **DCR** - Displays when a DCR has been submitted on the affiliation or it is part of a multi-child object DCR.
- **Under review** - Displays when the parent affiliation's record state is *Under Review*.
- **Inactive** - Displays when the status of the parent affiliation (`parent_hco_status__v`) is *Inactive (I)*.

Parent HCO Affiliations

**Amerinet** 
2060 Craigshire Rd Saint Louis MO 63146-4010
Purchasing
Operating/Ownership Hierarchy

**Amerinet Pittsburgh** 
500 Commonwealth Dr Warrendale PA 15086-7516
Purchasing
Operating/Ownership Hierarchy

[+ New Parent Affiliation](#)

Click the summary card to expand it and view more information. You can also click the parent HCO name to open that record in a new browser tab.



Amerinet [↗](#)

2060 Craigshire Rd Saint Louis MO 63146-4010

Purchasing

Operating/Ownership Hierarchy

<div style="margin-bottom: 10px;"> <p>Corporate Name *</p> <p>Amerinet</p> <p>2060 Craigshire Rd Saint Louis MO 63146-4010</p> <p>Verteo ID V-22ANCTXV51</p> </div> <div style="margin-bottom: 10px;"> <p>Relationship Type</p> <p>Purchasing</p> </div> <div style="margin-bottom: 10px;"> <p>Status</p> <p>Active</p> </div> <div style="margin-bottom: 10px;"> <p>Status Modified Date</p> <p>2015-02-28 20:17:50</p> </div> <div style="margin-bottom: 10px;"> <p>340B Contract Number</p> <p>No value</p> </div> <div style="margin-bottom: 10px;"> <p>End Date</p> <p>No value</p> </div> <div style="margin-bottom: 10px;"> <p>Demo ID</p> <p>No value</p> </div>	<div style="margin-bottom: 10px;"> <p>Hierarchy Type</p> <p>Operating/Ownership Hierarchy</p> </div> <div style="margin-bottom: 10px;"> <p>Parent Type</p> <p>No value</p> </div> <div style="margin-bottom: 10px;"> <p>Record State</p> <p>Valid</p> </div> <div style="margin-bottom: 10px;"> <p>Primary Relationship?</p> <p>No/False</p> </div> <div style="margin-bottom: 10px;"> <p>Start Date</p> <p>No value</p> </div> <div style="margin-bottom: 10px;"> <p>Network Entity ID</p> <p>260905149566813200</p> </div> <div style="margin-bottom: 10px;"> <p>Custom Keys</p> <p>MASTER__v</p> </div>
---	--

[↗ Parent Affiliation Field Revisions](#)

Click **Parent Affiliation Field Revisions** to quickly investigate field-level changes from contributing sources. For more information, see *Field level revision history* in these Release Notes.



Adding parent affiliations

To add a parent affiliation, click **+ New Parent Affiliation**. Add values for the **Corporate Name** and any other fields. When you have finished your changes, click **Apply** in the floating bar at the bottom of your browser window.

On an existing record, the HCO icon for parent affiliation summary cards indicates entity ownership, not child object ownership. For example, if you add a locally managed affiliation to Veeva OpenData (orange) record, the HCO icon for the parent affiliation will be orange.

Child affiliations

This section displays the child (HCO and HCP) affiliations for HCO records. The summary card contains the corporate name, primary address, and relationship type. Active affiliations are listed first, followed by inactive affiliations. Any inactive affiliations are hidden, by default, but can be displayed by clicking **Show inactive affiliations**.

Child Affiliations

HEALTHCARE ORGANIZATIONS (HCO)



Laurel Eye Clinic [↗](#)
908 Beaver Dr Du Bois PA 15801-2539
Ownership
Operating/Ownership Hierarchy



Laurel Eye Clinic [↗](#)
217 S Broad St Grove City PA 16127-1503
Ownership
Operating/Ownership Hierarchy

[Show inactive child affiliations \(2\)](#)

HEALTHCARE PROFESSIONALS (HCP)

No HCP Child Affiliations.

Click the summary card to expand it and view more information. You can also click the HCO name to open that record in a new browser tab.

There are no field revisions for child affiliations.

Licenses

This section displays a summary card for each SLN and DEA license assigned to the entity. The licenses are grouped by state and are sorted by issuing state, license eligibility, and best state license. Each summary card displays the following information for each type of license:

**SLN**

- License number
- Expiration date (if a license has expired, the date is dimmed)
The date is in the user's timezone.
- License degree (for example, RN, Doctor of Medicine)
- Licensing authority (state name)

DEA

- License number
- Expiration date (if a license has expired, the date is dimmed)
- DEA address
- Licensing authority (DEA)

The following badges might display on a license summary card to give users relevant information:

- **DCR** - Displays when a DCR has been submitted on a license or the license is part of a multi-child object DCR.
- **Under review** - Displays when the license record state is *Under Review*.
- **Inactive** - Displays when the license status (`license_status__v`) is *Inactive (I)*.
- **Sample eligible** - Displays only if the license is eligible. A license is sample eligible if `rxa_eligible__v` is *Eligible (E)*, license status (`license_status__v`) is *Active (A)*, license type (`type__v`) is *State (STATE)*, the grace expiry (`grace_period__v`) is defined and the grace period is in the future.
- **Not sample eligible** - (SNL only) Displays if the license is not eligible for sampling.



	22646  expires 2018-08-18 Doctor of Osteopathic Medicine Mississippi	 DCR	 Under review
	BC9108691 PO Box 909 Picayune Mississippi 39466-0909 United States DEA		
	25MB05655800  expires 2018-03-31 Doctor of Osteopathic Medicine New Jersey		 Sample eligible
	BC2949204 755 Memorial Pkwy Ste 300 Phillipsburg New Jersey 08865-2748 United States DEA		 Under review
	OS008015L  expired 2016-10-31 Doctor of Osteopathic Medicine Pennsylvania		 Inactive
+ New License			

[Show inactive licenses \(1\)](#)

Click a summary card to expand it and view more information.



22646 ✔ expires 2018-08-18

Doctor of Osteopathic Medicine

Mississippi

✔

Sample eligible

<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>Licensing Authority</p> <p>MS</p> </div> </div>	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>License</p> <p>22646</p> </div> </div>
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>License Degree</p> <p>DO</p> </div> </div>	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>License Type</p> <p>State</p> </div> </div>
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>Best State License?</p> <p>Yes/True</p> </div> </div>	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>License Eligibility</p> <p>Eligible</p> </div> </div>
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>Sample Eligibility</p> <p>Eligible</p> </div> </div>	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>Licensing Body</p> <p>BOME</p> </div> </div>
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>Drug Schedule Details</p> <p>No value</p> </div> </div>	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>DEA Activity Code</p> <p>Not Applicable</p> </div> </div>
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>Address</p> <p>No value</p> </div> </div>	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>License Status</p> <p>Active</p> </div> </div>
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>Effective Date</p> <p>2013-06-12</p> </div> </div>	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>Grace Expiry</p> <p>2018-08-18</p> </div> </div>
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>Expiration Date</p> <p>2016-06-30</p> </div> </div>	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>Anticipated Expiry Date</p> <p>2016-12-27</p> </div> </div>
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>Status Modified Date</p> <p>2015-07-28 18:31:12</p> </div> </div>	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>Created Date</p> <p>2013-11-21 11:08:12</p> </div> </div>
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>Modified Date</p> <p>2017-10-27 09:30:16</p> </div> </div>	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>Record State</p> <p>Valid</p> </div> </div>
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>Network Entity ID</p> <p>260905226976887826</p> </div> </div>	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 5px;"></div> <div> <p>license_demo_id</p> <p>No value</p> </div> </div>

[↩ License Field Revisions](#)



Click **License Field Revisions** to quickly investigate field-level changes from contributing sources. For more information, see *Field level revision history* in these Release Notes.

Adding licenses

To add a license, click **+ New License**. Add values any of the fields. When you have finished your changes, click **Apply** in the floating bar at the bottom of your browser window.

Custom child objects

Any custom child objects that have been created in your Network instance will display on the newly designed profile page. The left navigation includes the custom child object so that you can easily navigate to that section of the profile.

Example

A custom child object called **Studies** has been created in this Network instance.

The screenshot shows the profile page for Laurel Eye Clinic. The header includes the clinic name, address (50 Waterford Pike Brookville PA 15825-2518), and a 'Veeva Managed' badge. The left navigation menu lists various sections, with 'Studies' highlighted. The main content area, titled 'Studies', displays two active studies: 'Tetanus Study' and 'Vaccine Study'. Below these, a table provides details for the 'Vaccine Study':

Name	Status
Vaccine Study	Active

Record State	Network Entity ID
Valid	932071121699078177

At the bottom of the 'Studies' section, there is a '+ New Study' button.

Field revision history is not available on custom child objects.

Editing and adding custom child objects

Data stewards and data managers can edit and add custom child objects. The **+ New** card does not display and the existing fields are locked for other Network users. When you have finished your changes, click **Apply** at the bottom of the Profile page.



External Identifiers

This section lists any external IDs assigned to the record. Each custom key has its own card that can be expanded to display the dedicated fields: source, item type, value, and status. Only the custom key status field can be edited on existing custom keys.

- Primary Information
- Addresses
- Parent HCO Affiliations
- Child Affiliations
- General Information
- External Identifiers
- Licenses
- EMR Information
- Studies
- Custom Fields
- Record Information

External Identifiers

NPI	Tax ID
No value	No value
CLIA Lab #	CLIA Status
No value	No value
CLIA Effective Date	CLIA Exception Date
No value	No value
GLN ID	Associated with Kaiser?
No value	No/False
NCPDP #	MA CRI ID
No value	No value
SHA ID	AMS ID
No value	2546884

Custom Keys

MASTER__v: HCO: 260904760125686784

SAP: Account: 001F0000018wisWIAQ

<p>Source *</p> <p>SAP</p>	<p>Item Type *</p> <p>Account</p>
<p>Value *</p> <p>001F0000018wisWIAQ</p>	<p>Status</p> <p>Active <input style="width: 100px;" type="text"/></p>

+ New Custom Key

Adding custom keys

To add a custom key to a record, click **+ New Custom Key** and provide the information for the required fields. When you have finished your changes, click **Apply** at the bottom of the Profile page.



Sections with no changes

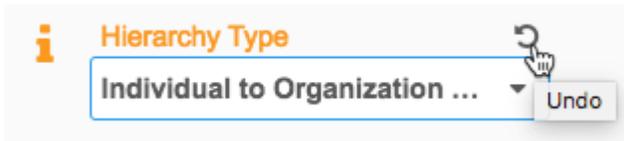
The following profile page sections are unchanged; they contain the same information and have the same behavior that they had in the classic view:

- Primary Information
- General Information (HCO)
- E-Contacts (HCP)
- Educational Information (HCP)
- Personal Information (HCP)
- Custom Fields
- Record Information
- Sanctions

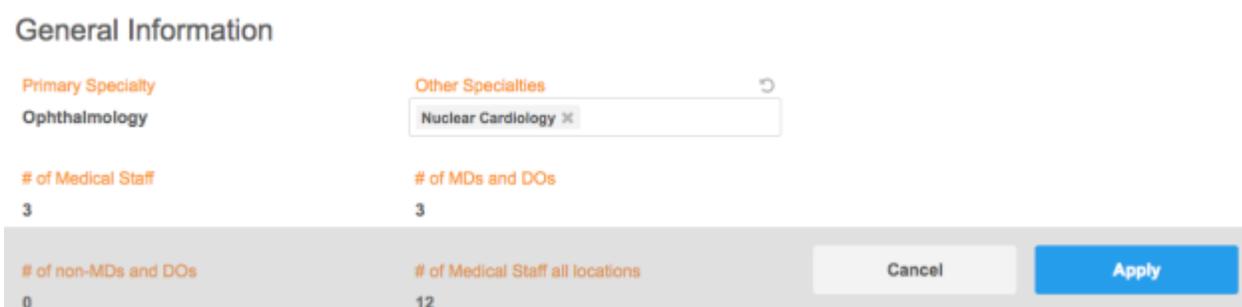
Editing profiles

All Network users can add or change unlocked fields on the Profile page.

When changes are made to a field, the **Undo** option displays above the field, so you have the option to revert your changes. The **Undo** button also provides an indication of fields that you've edited on the page.



When the Profile page has changes, a floating ribbon displays at the bottom of your browser window. Click **Apply** to save your changes. If you **Cancel** your changes, a dialog displays to confirm the action. If you reply **Yes** to confirm the cancellation, all changes are reverted and the profile is set back to view mode. If you answer **No** to the Cancel confirmation, the page remains in edit mode.

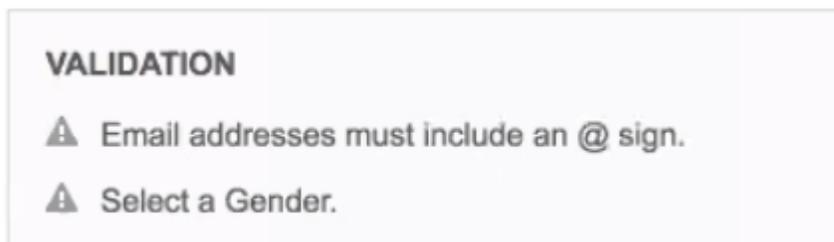


For administrators and standard users, clicking **Apply** creates a change request for the record. Data stewards and data managers can view their updates when the changes take effect by clicking the **Refresh** link.

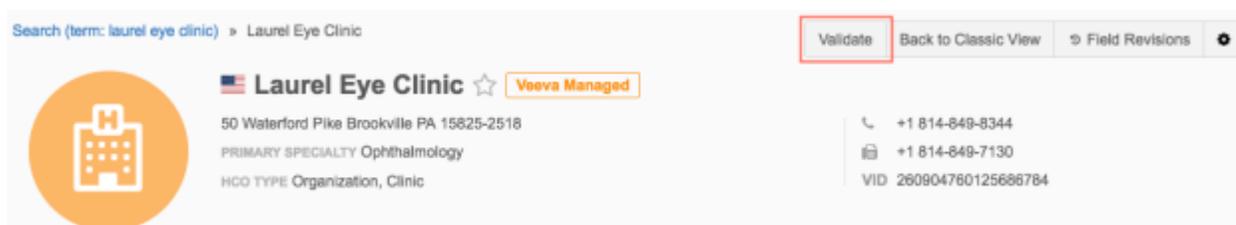


Data validation

If data validation rules are enabled in your Network instance, the validation rules run when data stewards or data managers **Apply** their changes. If errors occur, a **Validation** pane displays below the summary section to explain the data issues.



Data stewards and data managers can click the **Validate** button at the top of the page before making changes to the record profile to validate the existing data. When **Validate** is clicked, validation rules run. If errors occur, a **Validation** pane displays the issues. The button displays even if data validation rules are not enabled in the Network instance. The button does not display if changes have been made to the record profile. When the profile has changes, the validation rules run when **Apply** is clicked.



Stewarding candidate records

Data stewards and data managers can promote or delete candidate records from the Profile page.

If candidate records are enabled in your Network instance, a **Candidate** label displays beside the record ownership label in the Summary section for any candidate records. If a data steward or data manager has the **Candidate Visibility** permission set to `True` in their data visibility profile, a **Resolve** button displays at the top of the record. Click **Resolve** to promote the record to a valid record, or delete the record.

If changes have been made to the record, the **Resolve** button does not display. When the data steward or data manager clicks **Apply** to save their changes, a dialog displays with the following options:

- Apply Changes
- Apply Changes and Promote Record



FIELD LEVEL REVISION HISTORY

Network users can now quickly investigate field-level changes from contributing sources in a concise format directly from the Profile page. The differences between revisions are highlighted so users can easily see what data has been changed over time. This can help data stewards and data managers investigate issues with data. For example, if the status of an HCP record keeps changing from active to inactive, this might identify poor sources or issues with incorrect data. The field level changes can be exported so they can be shared with other internal teams.

This feature is enabled by default in all sandbox and production instances. In sandbox instances, only changes made to data after the 18R1.0 sandbox release displays in the field revisions feature. Also, historical data will be purged from sandbox instances after a period of time; for example, after one or two years.

Production instances will display all changes that have occurred to your data since the Network instance was created. However, there will be a delay for viewing historical data prior to 2018 in some Network instances after the 18R1.0.1 production release. In the weeks immediately following the release, all historical data will be available. Historical data will not be purged from production instances.

Note: The Revision History page will continue to be available to identify all the updates made in a specific version; while this Field Level Revision History feature can be used to identify changes to specific fields important to your investigation.

VERSION	TIMESTAMP	FIRST NAME	MIDDLE NAME	LAST NAME	NETWORK ENTITY ID	HCP TYPE	DEGREE 1	SPECIALTIES
431.0	2017-12-05 17:45:00	PANKAJ	K	KISOR	930111951662022896	P (Prescriber)	DRPH (Doctor of Public Health)	DNN (Residents - Diag I
430.0	2017-11-16 11:45:50	PANKAJ	K	KISORI	930111951662022896	P (Prescriber)	DRPH (Doctor of Public Health)	DNN (Residents - Diag I
428.0	2017-06-20 14:28:34	PANKAJ	K	KISOR	930111951662022896	P (Prescriber)	DRPH (Doctor of Public Health)	DNN (Residents - Diag I
427.0	2017-06-20 11:48:08	PANKAJ	K	KISOR	930111951662022896	P (Prescriber)	DRPH (Doctor of Public Health)	P (Psychiatry)
424.0	2017-06-05 14:19:27	PANKAJ	K	KISOR	930111951662022896	P (Prescriber)	RN (Registered Nurse)	P (Psychiatry)
422.0	2017-06-05 14:19:24	PANKAJ	K	KISOR	930111951662022896	P (Prescriber)	NP (Nurse Practitioner)	P (Psychiatry)
420.0	2017-06-05 14:19:17	PANKAJ	K	KISOR	930111951662022896	P (Prescriber)	DO (Doctor of Osteopathic Medicine)	P (Psychiatry)
416.0	2017-06-05 14:18:50	PANKAJ	K	KISOR	930111951662022896	P (Prescriber)	DH (Dental Hygienist)	P (Psychiatry)
414.0	2017-06-05 14:18:23	PANKAJ	K	KISOR	930111951662022896	P (Prescriber)	PHAR (Pharmacist Rx)	P (Psychiatry)
410.0	2017-06-05 14:17:38	PANKAJ	K	KISOR	930111951662022896	P (Prescriber)	DH (Dental Hygienist)	P (Psychiatry)

Accessing the field revision viewer

Network users can view the field-level revision history for a record from the Profile page. The **Field Revisions** button is available in the **Summary** section and also for each expanded child object (**Addresses, Licenses, Parent Affiliations**).



In the **Summary** section, click the **Field Revisions** button to view all revisions on the record.

The screenshot shows the Veeva Network interface. At the top, there is a search bar and navigation tabs: HOME, INBOX, MY REQUESTS, AD HOC MATCH, REPORTS, and NETWORK EXPLORER. The main content area displays the profile for PANKAJ KISOR Sr. The profile includes a name with a star icon, a location (44 HOLLAND ST ALBANY New York 12208 US), and various identifiers and specialties. A red box highlights the 'Field Revisions' button in the top right corner of the profile section.

In each of the child object sections on the profile, field revision history is available for each listed address, parent HCO, and license. Expand each item in the list (for example, an address) and click **Field Revisions**.

The screenshot shows the 'Addresses' section of the profile. It contains a list of address details in a two-column layout. The details include Address Type (Professional), Record State (Valid), Address Line 1 (1540 International Pkwy Ste 2000), Address Line 2 (No Value), Address Line 3 (No Value), City (Lake Mary), State/Province (Florida), Zip/Postal Code (32746-5096), Country (United States), Status (Active), Address Verification Status (Overridden), Address Rank (1), Phones (1-212-555-1212), and Faxes (1-212-555-1213). A red box highlights the 'Field Revisions' button at the bottom right of the section.

Note: If a record does not yet have revisions for the selected fields, the following message displays: **No data available**. There has to be a change on a record for a revision to display. If a record does not have revisions, a lock screen displays with the following message: **Field revisions are currently unavailable**.



Viewing field revision history

In the **Field Revisions** viewer, 10 versions display by default. Scroll to view additional versions.

VERSION	TIMESTAMP	FIRST NAME	MIDDLE NAME	LAST NAME	NETWORK ENTITY ID	HCP TYPE	DEGREE 1	SPECIALTY 1
435.0	2018-01-16 15:01:23	PANKAJ	K	KISHORE	930111951662022696	P (Prescriber)	MD (Doctor of Medicine)	PRCP (Primary Care Pr
433.0	2018-01-16 14:52:52	PANKAJ	K	KISHORE	930111951662022696	P (Prescriber)	MD (Doctor of Medicine)	P (Psychiatry)
431.0	2017-12-05 17:45:00	PANKAJ	K	KISOR	930111951662022696	P (Prescriber)	DRPH (Doctor of Public Health)	DNN (Residents - Diag I
430.0	2017-11-16 11:45:50	PANKAJ	K	KISORI	930111951662022696	P (Prescriber)	DRPH (Doctor of Public Health)	DNN (Residents - Diag I
428.0	2017-06-20 14:28:34	PANKAJ	K	KISOR	930111951662022696	P (Prescriber)	DRPH (Doctor of Public Health)	DNN (Residents - Diag I
427.0	2017-06-20 11:48:08	PANKAJ	K	KISOR	930111951662022696	P (Prescriber)	DRPH (Doctor of Public Health)	P (Psychiatry)
424.0	2017-06-05 14:19:27	PANKAJ	K	KISOR	930111951662022696	P (Prescriber)	RN (Registered Nurse)	P (Psychiatry)
422.0	2017-06-05 14:19:24	PANKAJ	K	KISOR	930111951662022696	P (Prescriber)	NP (Nurse Practitioner)	P (Psychiatry)
420.0	2017-06-05 14:19:17	PANKAJ	K	KISOR	930111951662022696	P (Prescriber)	DO (Doctor of Osteopathic Medicine)	P (Psychiatry)
416.0	2017-06-05 14:18:50	PANKAJ	K	KISOR	930111951662022696	P (Prescriber)	DH (Dental Hygienist)	P (Psychiatry)

For more information about the changes, click the version number to see the details about the source, requester, and approver. In the dialog box, click **Go to Revision History** to navigate to the Revision History page to investigate further. If the viewer identifies that a field has changed many times, you can go to the Revision History page to see the other attributes that were changed in a revision. This could help to determine if the quality of a source is poor.

Pankaj Kisor Sr - Field Revisions

Source	change_request
DCR ID	929358803758156959
Requestor	caladmin@verteo.com
Requestor Notes	New record added via Network portal.
Approver	mark.steward@verteo.com
Approver Notes	Accepted 12, modified 0 and rejected 0 of 13 changes.

[Go to Revision History](#)

Default columns

The default columns in the **Field Revisions** viewers are specific to the profile layout of the region.



Record summary

The **Field Revisions** viewer for the record summary (top of the profile page) includes all entity-level data model fields available for the record's primary country that have been included in the profile layout. Child object fields do not display in this **Field Revisions** viewer.

The default columns for the summary are:

- Entity Type (HCP Type or HCO Type)
- Entity Status (HCP Status or HCO Status)
- Degree 1
- Primary Specialty
- Major Class of Trade
- Primary Credentials

All entity-level fields are available to choose in the **Select Columns** list.

Addresses, parent affiliations, and licenses

Default columns for the field revisions are applied for each child object and are specific to the region and the profile layout.

Addresses

Default columns for addresses:

- Address Type
- Address Status
- Ordinal
- Primary Address
- Formatted Address

Address input fields also display by default. For example, for US addresses the following fields display: Address Line 1, Address Line 2, Address Line 3, City, State, ZIP Code and Country.



Address 1 - Field Revisions

Export Select Columns

VERSION	TIMESTAMP	ADDRESS LINE 1	ADDRESS LINE 2	ADDRESS LINE 3	CITY	STATE/PROVINCE	ZIP/POSTAL CODE	COUNTRY	ADDRESS TYPE	STATUS
99.0	2017-05-02 15:57:16	44 HOLLAND ST	No Value	No Value	ALBANY	US-NY (New York)	12208	US (United States)	P (Professional)	A (Active)
88.0	2017-05-17 15:00:37	44 HOLLAND ST	No Value	No Value	ALBANY	US-NY (New York)	12208	US (United States)	P (Professional)	I (Inactive)
69.0	2017-05-03 15:36:54	44 Holland Ave	No Value	No Value	Albany	US-NY (New York)	12208-3411	US (United States)	P (Professional)	I (Inactive)
63.0	2017-05-03 13:08:57	44 Holland Ave	No Value	No Value	Albany	US-NY (New York)	12208-3411	US (United States)	P (Professional)	A (Active)
47.0	2017-04-20 13:15:42	44 Holland Ave	No Value	No Value	Albany	US-NY (New York)	12208-3411	US (United States)	P (Professional)	I (Inactive)
28.0	2017-04-11 13:11:06	44 Holland Ave	No Value	No Value	Albany	US-NY (New York)	12208-3411	US (United States)	P (Professional)	No Value
27.0	2017-04-07 14:20:18	44 Holland Ave	suite112	200	Albany	US-NY (New York)	12208-3411	US (United States)	P (Professional)	I (Inactive)
20.0	2017-04-06 16:19:50	44 Holland Ave	suite112	200	Albany	US-NY (New York)	12208-3411	US (United States)	P (Professional)	A (Active)
15.0	2017-04-06 15:38:56	44 Holland Ave	suite112	No Value	Albany	US-NY (New York)	12208-3411	US (United States)	P (Professional)	A (Active)
14.0	2017-04-06 15:25:00	44 Holland Ave	No Value	No Value	Albany	US-NY (New York)	12208-3411	US (United States)	P (Professional)	A (Active)

Scroll for more

Parent affiliations

Default columns for parent HCOs:

- Parent Affiliation (corporate name and Network entity ID)
- Parent HCO Entity Status
- Hierarchy Type
- Relationship Type

Affiliation 2 - Field Revisions

Export Select Columns

VERSION	TIMESTAMP	PARENT AFFILIATION	HIERARCHY TYPE	RELATIONSHIP TYPE
99.0	2017-05-02 15:57:16	ALBANY COUNTY (930111951656648742)	PLAN_HCO (Plan to Organization Affiliation)	16 (Admitting Privileges)
19.0	2017-04-06 16:09:53	ALBANY COUNTY (930111951656648742)	HCO_HCO (Operating/Ownership Hierarchy)	16 (Admitting Privileges)
17.0	2017-04-06 16:05:03	ALBANY COUNTY (930111951656648742)	HCO_HCO (Operating/Ownership Hierarchy)	No Value

Licenses

Default columns for licenses:

- Licensing Authority
- License Status
- License
- License Degree
- Expiration Date
- Sample License Eligibility Fields



License 1 - Field Revisions						
VERSION	TIMESTAMP	LICENSING AUTHORITY	LICENSE	LICENSE DEGREE	LICENSE TYPE	LICENSE SUBTYPE
88.0	2017-05-17 15:00:37	NY	60231664	MD	state (State)	A (Administration)
83.0	2017-05-15 14:45:10	NY	60231664	MD	No Value	A (Administration)
69.0	2017-05-03 15:38:54	NY	60231664	MD	state (State)	A (Administration)
65.0	2017-05-03 13:57:34	NY	60231664	MD	COUNTRY (Country)	A (Administration)
64.0	2017-05-03 13:52:00	NY	60231664	MD	No Value	A (Administration)
61.0	2017-05-02 15:37:55	NY	60231664	MD	state (State)	A (Administration)
53.0	2017-04-20 15:55:12	NY	60231664	MD	No Value	A (Administration)
1.0	2017-04-03 15:35:53	NY	60231664	MD	state (State)	U (Unlimited)

Customizing fields in the viewer

Users can customize the **Field Revision** viewer by changing the fields that display and by moving the columns around. These settings will be saved across profiles when you are navigating from page to page and when you log out of Network and log back in.

Changing fields

To add or change the fields that display in the viewer, click **Select Columns**.

The available fields are sorted alphabetically. The lists contain fields specific to section (summary or child object) that are available in page layout for the country. For example, address-specific fields are available in the **Address** section, root entity fields are available in the **Summary** section.

Scroll to find the field or type the field in the **Search options** box.

The screenshot shows a table of field revisions for PANKAJ KISHORE Sr. The table columns are VERSION, TIMESTAMP, NAME, LAST NAME, NETWORK ENTITY ID, HCP TYPE, and DEGREE 1. A 'Select Columns' dialog is open on the right, allowing users to choose which fields to display. The dialog includes a search box and a list of fields with checkboxes. The following fields are checked: Degree 1, First Name, HCP Type, Last Name, Middle Name, Network Entity ID, and Specialty 1. Other fields like AMA Do Not Contact?, AMS ID, and AGA ID are unchecked. Buttons for 'Restore Defaults', 'Cancel', and 'Apply' are at the bottom of the dialog.

After you change the fields, click **Apply**. When you click **Select Columns** again, the selected fields display at the top of the list.

To change the columns back to the default display, click **Restore Defaults**.



Changing column display

Users can also customize the display order of the columns in the viewer. To move the columns around, click the column header and drag it to the new position in the table.

Exporting revision history

Network users can export the data displayed in the field level revision history viewer. For example, users might want to download and share the data with compliance teams.

To download the data, in the **Field Revision** viewer, click **Export**.

The data is exported in a .csv file with the following naming convention:

`<object_name>_<VID>_fieldrevisions.csv`; for example, `HCP_972111951663261127_fieldrevisions.csv` and `Address_930111951663267895_fieldrevisions.csv`.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Revision Number	Revision Date	Status	Address Rank	Address Line 1	Address Line 2	Address Line 3	City	State/Province	Zip/Postal Code	Country	Address Type	Full address	
2	99	2017-06-02T19:57:16Z	A (Active)	1	44 HOLLAND ST			ALBANY	US-NY (New Y	12208	US (United St	P (Profession	44 HOLLAND ST ALBANY I	
3	88	2017-05-17T19:00:37Z	I (Inactive)	3	44 HOLLAND ST			ALBANY	US-NY (New Y	12208	US (United St	P (Profession	44 HOLLAND ST ALBANY I	
4	69	2017-05-03T19:36:54Z	I (Inactive)	3	44 Holland Ave			Albany	US-NY (New Y	12208-3411	US (United St	P (Profession	44 Holland Ave Albany NY	
5	63	2017-05-03T17:08:57Z	A (Active)	1	44 Holland Ave			Albany	US-NY (New Y	12208-3411	US (United St	P (Profession	44 Holland Ave Albany NY	
6	47	2017-04-20T17:15:42Z	I (Inactive)	3	44 Holland Ave			Albany	US-NY (New Y	12208-3411	US (United St	P (Profession	44 Holland Ave Albany NY	
7	28	2017-04-11T17:11:06Z	I (Inactive)	2	44 Holland Ave			Albany	US-NY (New Y	12208-3411	US (United St	P (Profession	44 Holland Ave Albany NY	
8	27	2017-04-07T18:20:18Z	I (Inactive)	2	44 Holland Ave	suite112	200	Albany	US-NY (New Y	12208-3411	US (United St	P (Profession	44 Holland Ave suite112 2	
9	20	2017-04-06T20:19:50Z	A (Active)	1	44 Holland Ave	suite112	200	Albany	US-NY (New Y	12208-3411	US (United St	P (Profession	44 Holland Ave suite112 2	
10	15	2017-04-06T19:38:56Z	A (Active)	1	44 Holland Ave	suite112		Albany	US-NY (New Y	12208-3411	US (United St	P (Profession	44 Holland Ave suite112 #	
11	14	2017-04-06T19:25:00Z	A (Active)	1	44 Holland Ave			Albany	US-NY (New Y	12208-3411	US (United St	P (Profession	44 Holland Ave Albany NY	
12	1	2017-04-03T19:35:52Z	I (Inactive)	1	44 Holland Ave			Albany	US-NY (New Y	12208-3411	US (United St	P (Profession	44 Holland Ave Albany NY	

SEND ADD REQUESTS TO VEEVA OPENDATA

Data stewards and data managers can now route qualified local records to Veeva OpenData as add requests so OpenData takes ownership of the records. Sending the records to OpenData for ownership reduces stewardship cost for customers and improves data quality. Previously, if locally managed records were loaded into their Network instance and matches with Veeva OpenData records were not found, customer data stewards would need to manually copy the information into an add request and send it to OpenData. Now, data stewards can click a button on local record profiles to quickly send the record as an add request to OpenData. This feature does not support sending add requests to third party providers.

This feature is not enabled by default. Contact Veeva Support to enable it for your Network instance.

Set user permissions

When the feature is enabled, administrators can determine which group of users have access to the **Send to OpenData** button by assigning the permission on the data visibility profile.



To specify the users who can access this feature:

- In the Admin console, click **Users > Data Visibility Profile**.
- Select a data visibility profile and click **Edit**.
- In the **Permissions** section, set the **Send to OpenData** option to **True**.
- **Save** your changes.

The data stewards and data managers assigned to this data visibility profile will have access to the **Send to OpenData** button on locally managed records.

Sending records

Data stewards can route locally managed records to Veeva OpenData using the **Send to OpenData** button on the record profile.

The primary country of the record determines which Veeva OpenData master the add request is sent to. Address countries are not considered for add request routing.

The **Send to OpenData** button displays only if the following criteria are met:

- The record state is valid. The button is hidden if the record is in any of the following states: Under Review, Invalid, Merged_into, or Deleted.
- The user is a data steward or a data manager.
- The HCP type (for example, prescriber, nurse) or HCO type (for example, clinic, organization) is managed by Veeva OpenData (defined in the Veeva OpenData subscription).
- The record is locally managed.
- The record does not contain proprietary, restricted data, or third party system contributions - child objects or attributes cannot be from a proprietary system. Source systems can be marked as proprietary or restricted in **System Interfaces > Systems**. Data from a proprietary system is never shared with Veeva OpenData or a third party master.
- The record does not have local pending tasks (DCRs or suspect matches).
- The record has not already been sent to Veeva OpenData with pending master tasks.



After the button is clicked, a dialog displays to confirm that the record is not managed by a third party data provider: *You are sending a request for this record to be added to Veeva OpenData and to be maintained by Veeva. Was this record obtained from the data of another third party data provider other than Veeva (e.g, data from IMS / IQVIA)?*

If you answer **No**, the add request is sent to Veeva OpenData. If you answer **Yes**, the add request is canceled and the record cannot be sent to Veeva OpenData.

My Requests

Records that are routed using the **Send to OpenData** button display as add requests on the data steward's or data manager's My Requests page.

Data stewards and data managers can track the add requests that they send from the My Requests page.

Add requests

When add requests are sent to Veeva OpenData, any further updates made to the pending master record in your customer instance will be automatically rejected. Change requests can be made to this record after the add request has been processed by Veeva OpenData.

Add requests that are routed using **Send to OpenData** do not include the following information:

- Custom reference types for child objects (addresses, parent HCOs, and licenses). The values are removed.
- Inactive child objects
- Locally managed parent affiliations. If the record has a parent HCO relationship to an HCO from a proprietary source, the HCP record is sent to OpenData without the parent HCO relationship and HCO. Only Parent HCOs that are managed by Veeva OpenData are included in the add request.

Custom keys and sources are retained on the record if Veeva OpenData accepts the add request and assumes ownership of the record.

When the add request has been submitted, the following behavior occurs for the local record in the Network user interface:

- The record profile becomes locked; edits cannot be made. Incoming change requests are automatically rejected by Network with the following message: *"System Rejected - You cannot update a record that has been sent to OpenData. The record is currently Pending Master."*
- The record cannot be merged into another record; the **Find Suspect Match** option on the profile page is not available.
- For candidate records, the **Resolve** button on the record profile is disabled so data stewards or data managers do not accidentally resolve the candidate.
- When the **Create Verified** option is enabled in your Network instance (**Workflow Settings**), another unverified record will not be created. Network recognizes that the local record already exists, so a new unverified record will be prevented from being created.



If the add request is rejected by Veeva OpenData, the local record state does not become invalid. The record remains a valid local record that can be edited and the **Send to OpenData** button displays on the record's profile page.

My requests

Usability improvements have been made to the My Requests page so that users can more easily see the outcomes of the data change requests that they have submitted.

REQUESTER COMMENTS

The **Description** column name has been changed to **Requester Comments**. Users can add comments when they submit add and change requests. Adding comments is helpful for the user that submitted the DCR and the data stewards. Any comments that users make will display in this column. If a request does not contain comments, the column will be blank. Previously, default text displayed for add and change requests, regardless of whether the requests were accepted or rejected.

ENTITY	TYPE	REQUESTER COMMENTS	SUBMIT TIME	STATUS	RESOLUTION NOTES
Michael Camillo	Change		Mar 15	Pending Review	
Debra Tristram	Change	Dr. Tristram has expended her practice t...	Mar 15	Rejected	Could not confirm this specialty. Rejects ...
Jose Ventura	Change	Jose has a new position with Albany Health	Mar 15	Pending Review	
M Afifi	Change	Confirmed Mary's first name	Mar 15	Pending Review	
Vadim Barg	Change	Vadim provided additional information du...	Mar 15	Partially accepted	Specialty was incorrect, changed to prop...

Similarly, default **Requester Comments** no longer display on DCRs. If the user submitting the task does not add comments, no text displays.



Re-assign Reject Save Apply

Approved? ▾

✓ ✕ ✎

✓ ✕ ✎

REQUEST SUMMARY

Task ID
931062140786379935

Subject
Margitha Smith ☆
Abdominal Radiology

Creator
scott.woods@verteo.com

Source
Entity Profile Editor

Date Created
2017-09-18 11:00:58

Requester Comments
Added email address

Assignee
maggie.haas@verteo.com

Status
🕒 Pending Review

▶ **COMMENTS (0)**

REJECTED STATUS

On the My Requests page, if you submit a DCR that does not get approved, the status will be **Rejected**. Previously, the status was **Denied**. This change aligns the terminology to the terminology that is used in the DCRs.

RESOLUTION NOTES

A new column has been added to the My Requests page to display resolution notes that were added to a DCR. Multiple resolution notes can be added to a DCR, so in the column they are ordered by the most recent to the oldest. To view longer resolution notes that do not fit into the column, hovering over the note displays a tooltip with the full text. Text is capped after a defined length, but you can click the task to review all of the resolution notes.

FILTER BY STATUS

Network users can now filter the My Requests page by DCR status using the **Task Status** filter list at the top of the page. Previously, the **Status** column could be filtered using the caret (∨) in the column heading. This usability enhancement aligns the task status filtering behavior on this page with the behavior in the inbox.



Search

ADVANCED SEARCH

Usability enhancements have been made to advanced search to help users more easily access the form and find the records they are searching for.

These enhancements are enabled by default in all Network instances.

Accessing advanced search

Users can now open Advanced Search directly from the Network menu bar.



Highlighted fields

Users can now easily identify fields that are populated in the advanced search form because they are highlighted. The **Primary Country** is populated and highlighted by default if the user has only one data visibility profile.

The screenshot shows the 'Advanced Search' form with the following fields and values:

- Contains Keywords:** (Empty)
- Primary Country:** United States (highlighted)
- Name:**
 - First Name:** john (highlighted)
 - Last Name:** smith (highlighted)
 - Corporate Name:** (Empty)
- Location:**
 - Address Line 1:** (Empty)
 - Address Country:** France (highlighted)
 - State/Province:** Select an option
 - City:** (Empty)
 - Zip/Postal:** (Empty)
- More fields:**
 - FIELD NAME:** Entity Type
 - VALUE:** Select an option
 - [+ Add Search Fields](#)

Buttons at the bottom: Clear fields, Search



Searching by entity type

Users can search for records by entity type to retrieve a real-time count of HCOs or HCPs in the Network instance. The entity can be filtered by specialty or other fields to make queries more precise.

To search on entity type:

1. Click **Advanced Search** on the Network menu bar.
2. In the **More Fields** section, expand the **Field Name** list and select **Entity Type**.
3. In the **Value** list, select the entity: **HCO** or **HCP**.

FIELD NAME	VALUE
Entity Type	-
	HCO
	HCP

Objects identified on filters

In the search results, the object associated to the filter now displays when users hover over the filter. This enhancement is helpful for identifying the objects that similarly named fields belong to. For example, if the specialty *Abdominal Surgery* is specified in the advanced search form, when you hover over the filter in the search results, you can see that the filter is identified with the HCP entity. Abdominal Surgery is a specialty that could relate either to HCPs or to HCOs, so now users can see the object in the filter hover.

Search results for: *

FILTERS: Primary Country: United States ✕ Specialty 1: Abdominal Surgery ✕ Clear Filters | Edit Filters

☐ ▾ HCP Specialty 1: Abdominal Surgery

Double quote support for Chinese keyboard users

The advanced search feature now supports exact match for both curly double quotes (”) and straight double quotes (") Chinese keyboard users. Exact match will be performed regardless of which style of double quotes are used.



Inbox

NEW COLUMN

A new column, Task ID, is now available in the inbox. Adding this column to the inbox view enables data stewards, data managers, and administrators to easily view task IDs without having to open tasks.

To the column to your inbox view:

1. In the inbox, click the **Column Options**  button and choose **Select Columns**.
2. In the **Select Columns** dialog, expand **Task Data** in the **Available Columns** pane.
3. Select **Task ID** and move it into the **Selected Columns** pane.
4. Click **OK**.

Your inbox will be updated to display the new column.

SELECT MULTIPLE FILTERS

Inbox users can now pick multiple selections in the **Country**, **Task Status**, and **Source System** lists to filter their inbox. Previously, one selection could be made.

This enhancement is enabled by default.

In each list, the filter options are sorted in descending order of task count. In the **Country** and **Task Status** lists, all available options display - including options that have a zero (0) task count. In the **Source System** list, only sources that have a task count display.

The screenshot shows the Veeva inbox interface. At the top, there is a 'Create View' dropdown menu. Below it, there are three filter sections: 'Country' with a dropdown arrow, 'Task Status' with a dropdown arrow and a 'T' icon, and 'Source Systems' with a dropdown arrow. To the right of these filters is a 'Reset filters' link. The main inbox area contains a table of tasks. The first row has a search bar with 'Keyword' and a 'Select options' button. Below the search bar, there are several rows of task entries, each with a checkbox, a user profile icon and name, a star icon, and an action button. A dropdown menu is open over the 'Source Systems' filter, showing a list of options with checkboxes and task counts: 'All' (unchecked), 'Local (195)' (checked), 'data_maintenance__v (181)' (checked), 'SAP (5)' (unchecked), and 'thirdpartymaster (1)' (unchecked).

Country	Task Status	Source Systems	Reset filters
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> All	<input type="checkbox"/> Keyword
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Local (195)	<input type="checkbox"/> Charles Easmon
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> data_maintenance__v (181)	<input type="checkbox"/> Susan Anderson
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> SAP (5)	<input type="checkbox"/> Margitha Smith
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> thirdpartymaster (1)	<input type="checkbox"/> Jerome Espirt
<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> West End Medical Practice



Reports

ADVANCED QUERIES

Comments can now be added to queries in ad hoc reports (**Reports > Ad Hoc Queries**). This enhancement enables users to add text to explain the query and also to comment out lines while they work on a query.

Comments can be added using one of the following formats:

- Begin the comment with two hyphens (--)

```
-- <comment>
```

- Open the comment with a slash and asterisk (/*) and close the comment with an asterisk and slash (*/)

```
/*  
  <comment>  
*/
```

REVISION HISTORY REPORTS

Network users with access to advanced ad hoc reports can now create reports to review the revision history for HCO and HCP records. These reports are particularly useful at the bulk data level; for example, you can use reports to view the field level changes that occurred on records during a data import job, or investigate all of the records that were updated by a particular data source recently. Revision history is also useful for investigating changes to specific records; for example, changes in address rank or why a primary address changed.

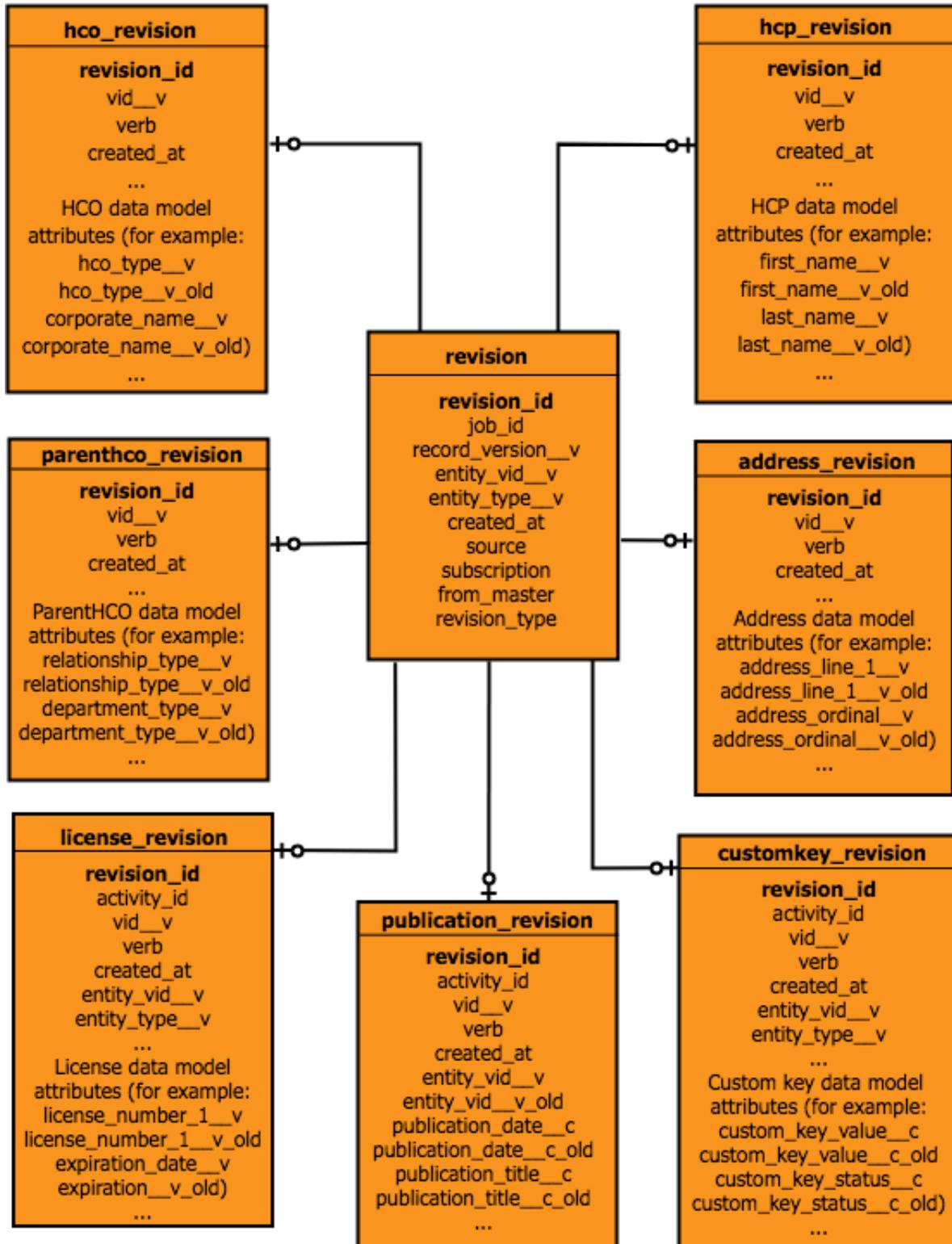
Reporting on revision history is an extension to the existing data and tables that a user can report on using advanced Ad Hoc Queries.

Production instances will display all changes that have occurred to your data since the Network instance was created. There will be a delay for viewing historical data in some Network production instances after the 18R1.0.1 production release. In the weeks following the release, all historical data will be available. Historical data will not be purged from production instances.

This feature is enabled by default in all sandbox and production instances for users that have access to advanced ad hoc reports.

Reporting schema

Revision tables have been added to the reporting schema to help users investigate changes in their data. Use these tables to help build your SQL query.



In the schema diagram, an example custom child object called Publication is included.



Example

Administrators and data managers might want to monitor the updates made to HCP records by a low-ranked data source during import jobs. This can help them decide whether to continue using the data source if they find that low quality or inaccurate changes are being made to records.

On the **Advanced** tab for ad hoc queries (**Reports > Ad Hoc Queries**), type the following SQL query into the query box.

```
SELECT
    job_id,
    source,
    subscription,
    record_version__v,
    entity_vid__v,
    verb,
    first_name__v_old,
    first_name__v,
    last_name__v_old,
    last_name__v,
    medical_degree_1__v_old,
    medical_degree_1__v,
    hcp_status__v_old,
    hcp_status__v,
    speaker__c_old,
    speaker__c
FROM
    revision JOIN hcp_revision
        ON revision.revision_id = hcp_revision.revision_id

WHERE
    job_id = 11354
    AND source = 'LowDataSource'
```

This is a report that will be run regularly, so **Save** the report. Each time the job is run, specify the job ID in the query.

The report results show the changes made by the specified job to HCP records. Use this information to evaluate the data source.



Reports > Records Updated By LowDataSource > View

Report Run

JOB ID	SOURCE	SUBSCRIPTION	RECORD VERSION	NETWORK ID OF OWNER	ACTION	FIRST NAME (PREVIOUS)	FIRST NAME	LAST NAME (PREVIOUS)	LAST NAME	DEGREE 1 (PREVIOUS)	DEGREE 1
11354	LowDataSource	LowQualitySource	2.0	930735613545611295	Update						
11354	LowDataSource	LowQualitySource	2.0	930735618039742495	Update						Doctor of Pharmacy
11354	LowDataSource	LowQualitySource	4.0	615369796379293185	Update						
11354	LowDataSource	LowQualitySource	4.0	615369802617295681	Update	Roger Mdschian	Rogerson Mdschian				
11354	LowDataSource	LowQualitySource	4.0	615369803120612371	Update					Doctor of Medicine	Doctor of Dental Surgery
11354	LowDataSource	LowQualitySource	4.0	615369803084638987	Update						
11354	LowDataSource	LowQualitySource	4.0	615369810612965904	Update	Mary	Mary Ann				
11354	LowDataSource	LowQualitySource	6.0	930725244583280672	Update						Doctor of Pharmacy
11354	LowDataSource	LowQualitySource	2.0	93073559521242975	Update	David	Davidson				
11354	LowDataSource	LowQualitySource	3.0	930724393090875424	Update	Jonathan	John				Doctor of Pharmacy
11354	LowDataSource	LowQualitySource	4.0	615369804177576969	Update	Frank V	Franklin				
11354	LowDataSource	LowQualitySource	2.0	930724865900740642	Update	Olivia	Livia				
11354	LowDataSource	LowQualitySource	5.0	930725244583280674	Update	Andy	Andrew				Doctor of Pharmacy

DATA QUALITY REPORTS

Predefined test cases and entity groups are now available for New Zealand for data quality reports. These entity groups and test cases are only available in Network instances containing New Zealand data. In addition, new test cases are added for Australian data.

New Zealand entity groups

The following entity groups will be added for New Zealand data:

- NZ Veterinary Organisation
- NZ General Buildings
- NZ Professional Buildings
- NZ Hospital Buildings
- NZ Pharmacies
- NZ Surgery Buildings
- NZ Other Buildings
- NZ Doctor
- NZ Non Prescribers
- NZ Nurses
- NZ Pharmacists
- NZ Animal Health
- NZ Dentists
- NZ Business Professionals
- NZ Technicians



New Zealand test cases

The following test cases will be added for New Zealand data:

- Address - Duplicate Active Address
- Address - Duplicate Address Rank
- Address - Inactive Address Flagged as Primary Address
- Address - No Active Address with Address Rank 1
- Fax - Duplicate Address Faxes
- Fax - Missing Address Fax Number
- HCO - Missing Major Class of Trade
- HCP - Missing Gender
- HCP & HCO - Duplicate URLs
- HCP & HCO - Missing Status
- HCP & HCO - Missing Status
- Name - Corporate Name = Alternate Name
- Name - Missing Prefix
- Phone - Duplicate Address Phone Numbers
- Phone - Missing Address Phone Number
- Relationship - Duplicate
- Relationship - Inactive HCO with Active Child Affiliations
- Specialty - Duplicate Specialties
- Specialty - Missing Specialty

Australia and New Zealand test cases

The following test cases will be added to both Australian and New Zealand data:

- Address - Improper Postal Code (AU, NZ)
- Address - Active Address on Inactive HCP/HCO
- Address - HCO with Duplicate Address Type
- Address - Incomplete Active Address Line 1
- Address - Missing Address Status
- Address - Missing Address Type
- Address - Missing City
- Address - Missing Country Code
- Address - Missing Postal Code
- Address - No Active Address
- Address - Primary Country to Address Country Mismatch
- Fax - Incomplete Address Fax Number
- Name - Missing Corporate Name
- Name - Missing First Name
- Name - Missing Last Name
- Phone - Incomplete Address Phone Number
- Relationship - Duplicate Active Primary Relationship
- Relationship - Missing Relationship Type
- HCP & HCO - Invalid Record with Active Custom Key
- Address - Invalid Address with Active Custom Key
- License - Invalid License with Active Custom Key
- Relationship - Invalid ParentHCO with Active Custom Key

Australia test cases

The following test cases have been added to the existing list of test cases for Australian data:

- Address - Active Rank 99 Address
- Address - Missing State/Province
- Degree - Duplicate Medical Degrees



Activate entity groups and test cases

Data managers or administrators can activate these test cases and entity groups for their Network instance.

1. On the Network menu bar, click **Reports > Quality Reports**.
2. On the Data Quality Reports page, click the **Gear**  icon.
3. On the Manage Data Quality Reports page, select the entity groups and test cases.
4. Click **Update Report**.

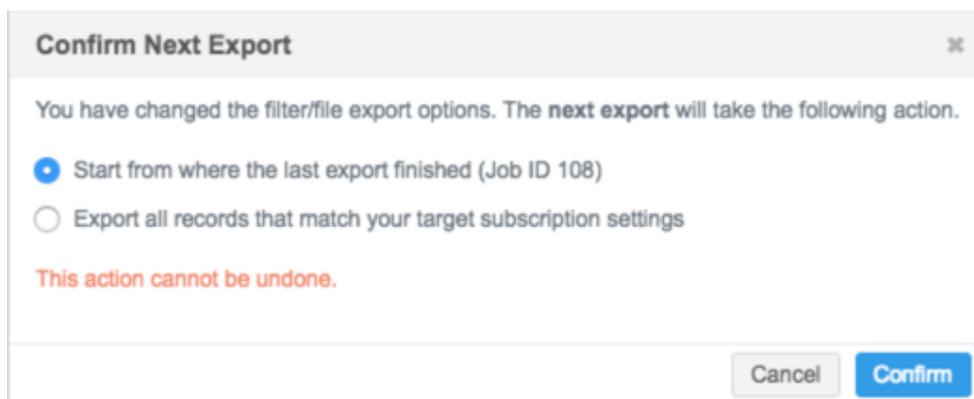
The selected entity groups and test cases will be added to the data quality reports for their Network instance.

Data export

SUBSCRIPTION DELTA

After updating an existing target subscription, data managers and administrators can now choose whether to export all records or export the delta of records from the last job run. Previously, when the filters for a subscription were changed, Network automatically exports all of the records that match the filters. Now, if the filters or field selections are changed, users can choose whether to start the export from where the previous job left off, or export all records from the very beginning. This enhancement provides users with a choice so they don't have to unnecessarily export all records.

This enhancement is enabled by default for all existing subscriptions.



Network considers any changes to filters as a potential reset to the existing subscription. The potential reset occurs because it is assumed that changes mean that the subscription should start over with the new defined fields and filters. Any changes to the following sections will be considered a potential reset of the subscription:

- **File & Field Selection**
- **HCP Export Options**
- **HCO Export Options**
- **Custom Keys Export Options**



After you make changes in these sections and click **Save** to update the subscription, a confirmation dialog displays with the following export options:

- **Start from where the last export finished** The job ID of the previous export displays so you can see the last Network entity ID that was exported. (This option is selected by default)
- **Export all records that match your target subscription settings**

Choose the appropriate export option and click **Confirm**. The next export job will use the selected option; it cannot be changed before the job runs.

The **Confirm Next Export** dialog displays any time changes are made to the filters for a target subscription. If the target subscription filters are not changed, the delta of records from the last job that ran will be exported, as usual.

Data model

MANAGING CLUSTERS - ENHANCEMENTS IN 18R1.0

The cluster management feature was introduced in version 17R3.2. The following enhancements have been added to this feature for 18R1.0.

Supported cluster providers

Network has included support for the following cluster provider / country combinations. A TPA must be signed with the third party cluster provider to use the cluster management feature.

- United Kingdom - IQVIA™
- Monaco - GERS™

Job Details

The Job Details page has been enhanced to display counts of addresses that were updated during the **Refresh Addresses** job.



[Cluster Management](#) > [Cluster Management \(France\)](#) > [Job Details \(ID: 564\)](#)

Job Details (ID: 564)

▼ Overview		
Subscription	address_cluster__v_FR	
Job ID	564	
Start Time	2017-08-10T19:16:00+02:00	
Percent Complete	100.00%	
Duration	a few seconds	
Outcome	COMPLETE	
Started By	Patrick Kübler	
Trigger	MANUAL	
▼ Job Result Summary		
	SUCCESSFULLY UPDATED ADDRESSES	ADDRESSES UPDATED WITH ERRORS
HCP	2568	2
HCO	1560	0

Successful jobs

For jobs that completed, the **Job Result Summary** section displays a count of addresses that were updated successfully with calculated cluster codes and addresses that were updated with errors. If updates with errors occurred, it means that errors occurred during the cluster calculation. If there are two cluster levels for a provider, and the calculation fails for one of the levels, it will be counted as an error.

Addresses updated with errors

Errors typically occur because individual addresses have data issues (for example, a postal code is missing, incomplete, or has a typo). Correct the address and the cluster code will be calculated again when the DCR for the updated address is processed. Errors can also occur if there is a problem with Network's calculation algorithm or the cluster data that was obtained by the third party cluster provider. First, always verify that the address is correct. If the address is correct and the problem persists, contact Veeva Support for assistance.

Failed jobs

For jobs that did not successfully complete, the Job Details page displays the percentage of the job that completed and the count of addresses, by entity type, that were updated successfully or with errors.



Address verification

Cluster code calculation is now triggered by address verification. When data stewards change an address on the profile page and click the **Verify** button, Network will calculate the cluster code for the updated address.

In the **Address Verification** dialog, data stewards can click **Show cluster** fields to preview the cluster information.

Address Verification			
Address Verification Status	Verified	Overridden	Verified
Cluster Code 1	784912	784912	784912
Cluster Label 1	City of London	City of London	City of London
Cluster Level 1	1	1	1
Cluster Status 1	Success	Success	Success
Cluster Code 2	219487	219487	219487
Cluster Label 2	City of London	City of London	City of London
Cluster Level 2	2	2	2
Cluster Status 2	Success	Success	Success
Cluster Provider	QuintilesIMS	QuintilesIMS	QuintilesIMS
Cluster Version	Version 2.0 (Added on 2017-09-05)	Version 2.0 (Added on 2017-09-05)	Version 2.0 (Added on 2017-09-05)

Until the DCR is approved, the profile page displays the old address and old cluster code. After the DCR is approved and the cluster calculation is triggered again, the values on the profile page are updated.

Configuration management

Administrators can now export cluster management configurations from a source environment and import it to a target Network environment.

The cluster management feature must be enabled in both instances for the same provider/country combination for the configuration to be imported successfully. For example, both the source and target environment must have `GERS - France` enabled. If the target Network environment does not have cluster management feature enabled, or the provider/country combination is different than the source environment, the configuration is skipped during import.

Overriding codes

Previously, to override cluster codes, administrators or data managers had to update the `entity.model.cleanser.ADDRESS` advanced property to remove the "address.cluster" value. The property no longer needs to be updated for Network to override or revert cluster codes.



MANAGING CLUSTERS

The cluster management feature was introduced in version 17R3.2.

Addresses in Network can now be enriched by adding cluster codes from third party providers. Clusters are proprietary codes that are assigned to geographical areas. They are owned and managed by third party providers. When cluster codes are added to addresses in Network, you can use the data to understand your market share and to link your HCP and HCO records to the sales and performance data you receive from third party providers. Adding cluster information to Network also enables you to use it in your downstream systems.

This feature is not enabled by default. Before the feature can be enabled in your Network instance, you must request and sign a third party agreement (TPA) with the cluster provider. The TPA is required for each country; it must state the country where the third party cluster data can be used. After a TPA is signed, customers can obtain cluster definitions files from the third party cluster provider and share them with Network. Network uses the data in the files to calculate the cluster information for the applicable addresses in your Network instance.

For customers using Network Delivery Manager, this feature is available and can be implemented by Veeva Professional Services. Contact Veeva Support for more information.

Supported cluster providers

For this release, Network's cluster calculation is supported for these countries and providers. A TPA must be signed with the third party data provider to use the feature.

- France - GERS™
- Netherlands - FarmlInfo™

Supported records and fields

All records in your Network instance can be supplemented with cluster codes for applicable countries. This includes Veeva OpenData records, third party provider records, and locally managed records.

Cluster codes are stored in customer fields, so changes to cluster codes will never be sent as a data change request to Veeva OpenData or a third party provider. Cluster codes that are calculated by Network can only be changed using a source subscription.

Data model updates

The Network data model is updated with a set of fields to support cluster management. The fields are disabled by default. When cluster management is enabled for a country in your Network instance, the fields are also enabled so that they are ready for use.

To view the fields used for cluster management, in the Admin console, click **Data Model > Network Data Model** and select the **Address** object in the **Quick Links**.



Network Data Model					
Country					
All countries					
Export Create Custom Field					
cluster_1_ambiguous_codes__c	Cluster 1 Ambiguous Codes	Text			✓
cluster_1_code__c	Cluster 1 Code	Text			✓
cluster_1_error__c	Cluster 1 Error	Text			✓
cluster_1_label__c	Cluster 1 Label	Text			✓
cluster_1_level__c	Cluster 1 Level	Reference Type	AddressClusterLevelLa...		✓
cluster_1_provider__c	Cluster 1 Provider	Reference Type	AddressClusterProvider		✓
cluster_1_status__c	Cluster 1 Status	Reference Type	AddressClusterStatus		✓
cluster_1_version__c	Cluster 1 Version	Reference Type	AddressClusterProvide...		✓
cluster_2_ambiguous_codes__c	Cluster 2 Ambiguous Codes	Text			✓
cluster_2_code__c	Cluster 2 Code	Text			✓
cluster_2_error__c	Cluster 2 Error	Text			✓
cluster_2_label__c	Cluster 2 Label	Text			✓
cluster_2_level__c	Cluster 2 Level	Reference Type	AddressClusterLevelLa...		✓
cluster_2_provider__c	Cluster 2 Provider	Reference Type	AddressClusterProvider		✓
cluster_2_status__c	Cluster 2 Status	Reference Type	AddressClusterStatus		✓
cluster_2_version__c	Cluster 2 Version	Reference Type	AddressClusterProvide...		✓

Managing cluster settings

Prerequisite

Customers must request a third party agreement (TPA) from the cluster provider before the feature can be enabled in their Network instance. The TPA is a request to obtain the cluster definition files for the applicable country and to share and use that data in Network. Network uses the cluster definition files to calculate the cluster data for addresses.

After a TPA is signed, Veeva Support will enable cluster management for the country in your Network instance.

Configure cluster settings

When cluster management is enabled for a country in your Network instance, administrators can configure the settings for the country.

1. In the Admin console, click **Data Model > Cluster Management**.
2. On the Cluster Management page, select the country/provider combination to configure. Only the countries that have been enabled for cluster management in your instance will display.

For example, click the row for **France / GERS**.



DATA MODEL						
Network Data Model	Data Model > Cluster Management					
Reference Data	Cluster Management					
Cluster Management	Cluster Management					
COUNTRY	PROVIDER	ENABLED	SCHEDULE	LAST JOB TIME	LAST JOB STATUS	
France	GERS	No				
Netherlands	FamInform	No				

- In the **Cluster Management Details** section, administrators can manage the following settings:
 - Enabled** - The country is disabled by default. Select **Yes** to enable the calculation of cluster codes for the country.
 - Cluster Version** - The version of the cluster definition file sent by the cluster provider for the cluster codes.

New versions might be periodically provided by cluster providers. When you receive a new version of the cluster definition file, send the file to Veeva Support. The file will be added to Network and will be available in a subsequent release.

If the cluster codes rely on geocodes, a warning message displays to remind administrators that geocodes (latitude and longitude) are required for this cluster provider. Most addresses in Network do not have geocodes, but they can be obtained from third party data providers.

Cluster Management (France) Cancel Save

Cluster Management Details

⚠ The cluster calculation for the provider in this country requires geocodes (latitude/longitude). Ensure that addresses for this country have geocodes enabled.

Enabled Yes No

Cluster Provider GERS

Cluster Version Version 1.0 (Added on 2017-04-27) ▾

Field Mappings

Cluster Level	Network Field
No Mapping ▾	cluster_1_level__c
No Mapping ▾	cluster_2_level__c

Refresh Schedule

Trigger Scheduled Manual



4. In the **Field Mappings** section, map the cluster levels from the provider to the available data model fields. Each third party cluster provider defines their own cluster levels.

Cluster Level	Network Field
No Mapping	cluster_1_level_c
No Mapping	cluster_2_level_c
UGA	

5. In the **Refresh Schedule** section, choose whether addresses will refresh on a schedule, or manually.
6. **Save** your changes.

Manually refreshing addresses

Administrators can update all of the addresses for a country with cluster codes using a data maintenance job. At the top of the Cluster Management page for a country, click **Refresh Addresses**.

Cluster Management (France) Refresh Addresses Cancel Save

Cluster Management Details

⚠ The cluster calculation for the provider in this country requires geocodes (latitude/longitude). Ensure that addresses for this country have geocodes enabled.

Enabled Yes No

Running the data maintenance job is helpful and recommended in the following circumstances:

- After you have initially enabled and configured cluster management. Running the **Refresh Addresses** job will backfill all of the addresses for that country with cluster codes.
- When the cluster provider has released a new version of their cluster hierarchy. Running the job ensures that all of the addresses for the country have the latest cluster codes. In the **Cluster Version** list, select the new version and save the configuration before running the job.



Job details

After running a data maintenance job to refresh addresses, administrators can view the job details. In the **Job History** section on the Cluster Management page for the country, click the Job ID.

Cluster Management (France) Refresh Addresses Cancel Save

Cluster Management Details

⚠ The cluster calculation for the provider in this country requires geocodes (latitude/longitude). Ensure that addresses for this country have geocodes enabled.

Enabled Yes No

Cluster Provider GERS

Cluster Version Version 1.0 (Added on 2017-04-27) ▼

▶ Field Mappings

▶ Refresh Schedule

▼ Job History

ID	START TIME	DURATION	UPDATED ADDRESSES	TYPE	OUTCOME
580	2018-02-04 07:01:00	a few seconds	42	MANUAL	COMPLETE
579	2018-01-04 06:59:00	a few seconds	3641	MANUAL	COMPLETE

Profile updates

Cluster code information is available on the profile page for enabled countries. Expand an address to view the cluster fields. All cluster fields are customer fields and they are read-only; they cannot be edited on the profile.



 Doctor Kieran Moriarty ☆

Delta ID 931826563961683969	Externally Mastered Record? false
Proprietary Record? No Value	Created Date 2017-03-14 07:21:07
Modified Date 2018-01-31 10:03:50	Status Modified Date 2017-03-14 07:21:07
Cluster 1 Ambiguous Codes No Value	Cluster 1 Code BL04
Cluster 1 Error No Value	Cluster 1 Label KEARSLEY
Cluster 1 Level Postal code	Cluster 1 Provider GERS
Cluster 1 Status Cluster assigned successfully	Cluster 1 Version Version 1.0 (Added on 2017-08-18)
Cluster 2 Ambiguous Codes No Value	Custom Keys MASTER__v
Cluster 2 Code No Value	Cluster 2 Error No Value
Cluster 2 Label No Value	Cluster 2 Level No Value
Cluster 2 Provider No Value	Cluster 2 Status No Value
Cluster 2 Version No Value	

Events that trigger cluster code calculation by Network

When a country is enabled for cluster codes, records are updated with cluster information from the related provider during the following events:

- Downloading Veeva OpenData records using the Network UI; for example, a data steward searches for and downloads an orange record using Sync with OpenData.
- Running Veeva OpenData subscriptions that download and update records in the Network instance. Any existing records where the **Cluster Status** field is ○ (overridden) are not updated from the subscription job.
- Approving data change requests (DCRs) for addresses. When a new address is verified by a data steward and the DCR is approved, the cluster information is calculated by Network and added to the record.



- Loading data from local or third party data providers. In the source subscription, the advanced property, "entity.model.cleanser.ADDRESS", must contain the value "address.cluster" so cluster codes are calculated for addresses. If the advanced property exists in the source subscription, add the "address.cluster" value. Separate values with a comma (,); for example:

```
"entity.model.cleanser.ADDRESS" : "address.loqate, address.cluster"
```

Also, all required address fields must be included in the source file. Any existing records where the **Cluster Status** field is 0 (overridden) are not updated from the subscription job. For more information, see the section called *Overriding cluster codes*.

- Clicking **Refresh Addresses** to run the data maintenance job.

Overriding cluster codes

If there are addresses where no code or an ambiguous code was calculated by Network, administrators can override the cluster codes by loading a .csv file in a source subscription. Overriding the cluster codes this way ensures that you can have the correct data in your Network instance without waiting to discover why the calculation did not work. When cluster codes are changed, the status needs to be updated to 0 (overridden) so the code is not recalculated when the address refresh job runs again.

Prerequisites

Before you create a source subscription, complete the following tasks:

- Create a .csv file and include the address attributes that are required for the cluster calculation.

The following fields must be included in the .csv file:

- cluster_1_code__c - The code that you want the cluster field to contain.
- cluster_1_status__c - This must be set to 0 (overridden).

Example

To update the cluster fields on two addresses, add the Network Entity ID of the HCP or HCO records and the addresses.

	entity_vid__v	address_vid__v	cluster_1_status__c	cluster_1_code__c	cluster_1_label__c
1	478881650273420289	639710077841851395	0	1122	Observatoire
3	478881650273420289	639749895493796865	0	3344	Vaugirard

If the second level of cluster codes is used, cluster_2, the same set of fields for should be added to the file.

- Create a source system for the third party cluster provider (**System Interfaces > System**).

When the prerequisite steps are complete, create the source subscription.



To create a source subscription to override codes:

1. In the Admin console, click **System Interfaces > Source Subscriptions**.
2. Type a **Name** and **Description** for the subscription.
3. Select the **System** that you created for loading the cluster definition file.

cluster_update Details [Advanced Mode] [Clone] [Start Job] [Cancel] [Save]

Details

Name: cluster_update System: GERS

Code: cluster_update__c ?

Description: Update cluster codes for addresses in France

Settings

GENERAL SETTINGS

Allow File Reprocessing ? Apply Updates & Merge ?

Job Error Log ?

MATCH SETTINGS

Action for Unmatched & Suspect Match: No Action ? Match Against OpenData ?

Source Dedupe: Select options ?

EXPORT SETTINGS

Data Group Analysis: Select options ? Match Analysis: Select options ?

Match Analysis Advice Filters: 3 items selected

4. In the **General Settings** section, click **Apply Updates & Merge** so that addresses are updated during the job.
5. In the **Match Settings** section, expand the **Action for Unmatched & Suspect Match** option list and select **No Action**. This ensures that records are not created if Network cannot find a match for the records that are in the .csv file.

Note: The other options in the **Settings** section do not need to be changed; the default values can remain.

6. In the **Source Files** section, specify the file and path for the .csv file. Add applicable **File Definitions**.



Source Files

FTP Path

File Definitions

File Name Alias

Key Column(s) Text Qualifier

Format

Delimiter

Header Row?

[Add File](#)

- In the **Modelling & Normalization** section, identify how the data is provided in the incoming files, along with instructions on how to use them.

Modelling & Normalization

Model Map

```
[
  {
    "entity": "HCP",
    "from": "HCP",
    "attributes": [
      "HCP.*",
      "HCP.VDM_* AS *"
    ]
  },
  {
    "entity": "ADDRESS",
    "from": "HCP",
    "anchors": [
      {
        "anchor": "HCP.entity_vid__v",
        "attributes": [
          "HCP.address_vid__v",
          "HCP.cluster_1_status__c",
        ]
      }
    ]
  }
]
```

Field Normalization

```
{
  "HCP": {
    "HCP.entity_vid__v": "vid__v"
  },
  "ADDRESS": {
    "HCP.address_vid__v": "vid__v",
    "HCP.cluster_1_status__c": "cluster_1_status__c",
    "HCP.cluster_1_code__c": "cluster_1_code__c",
    "HCP.cluster_1_label__c": "cluster_1_label__c"
  }
}
```



For example, using the.csv file from the *Prerequisites* section above, the following definitions would be defined:

Model Map

```
[
  {
    "entity": "HCP",
    "from": "HCP",
    "attributes": [
      "HCP.*",
      "HCP.VDM_* AS *"
    ]
  },
  {
    "entity": "ADDRESS",
    "from": "HCP",
    "anchors": [
      {
        "anchor": "HCP.entity_vid__v",
        "attributes": [
          "HCP.address_vid__v",
          "HCP.cluster_1_status__c",
          "HCP.cluster_1_code__c",
          "HCP.cluster_1_label__c"
        ]
      }
    ]
  },
  "attributes": [
    "HCP.VDM_* AS *",
    "HCP.VDM_ENTITY_ID AS VDM_FKENTITY_ID",
    "VDM_ENTITY_ID=@NEW_ENTITY_ID"
  ]
}
```



Field Normalization

```
{
  "HCP": {
    "HCP.entity_vid__v": "vid__v"
  },
  "ADDRESS": {
    "HCP.address_vid__v": "vid__v",
    "HCP.cluster_1_status__c": "cluster_1_status__c",
    "HCP.cluster_1_code__c": "cluster_1_code__c",
    "HCP.cluster_1_label__c": "cluster_1_label__c"
  }
}
```

8. Match configuration is not required because Network will match on the Network entity IDs (VIDs) defined in the .csv file; fuzzy match will not be used.
9. Save and run the source subscription.

After the source subscription runs, the addresses will be updated with the codes contained in the source file. The status of the overridden codes will be O so they will not be recalculated the next time the addresses refresh job is run.

Reverting overridden cluster codes

If incorrect cluster code calculations have been fixed and you want Network to calculate overridden codes again, you can revert the codes using a source subscription. Change the **Cluster Status** field for the address from O (overridden) to R (reverse) and Network will calculate the cluster code when the subscription runs.

Prerequisite

- Create a .csv file and include the address attributes that are required for the cluster calculation.

The following fields must be included in the .csv file:

- cluster_1_status__c - This must be set to R (reverse).

Example

To reverse the codes that you updated in the *Overriding cluster codes* section, change the cluster_1_status__c field from O (override) to R (reserve).

	entity_vid__v	address_vid__v	cluster_1_status__c
1	478881650273420289	639710077841851395	O
2	478881650273420289	639710077841851395	O
3	478881650273420289	639749895493796865	R



If the second level of cluster codes is used, `cluster_2`, the same set of fields for should be added to the file.

To update overridden cluster codes, follow the steps in the *Overriding cluster codes* section. The subscription settings are the same for reversing codes.

When the source subscription runs, the cluster codes for the applicable addresses will be refreshed and any codes that have a status of `R` will be recalculated by Network. On the profile page, the **Cluster Status** field for the address will display `Success` to indicate that it was calculated correctly.

Logs

Cluster codes changes are tracked in the audit history and revision history.

CUSTOM CHILD OBJECTS – ENHANCEMENTS IN 18R1.0

The custom child objects feature was introduced in version 17R3.1. The following enhancement has been added for 18R1.0.

Managing configurations

Administrators can now include custom child objects in their configuration exports. Importing the configuration package will create the custom child object in the target environment.

When export packages are created to download or to import to a target environment (**Settings > Configuration Export**), ensure that all of the custom child object configuration items are included in the package.

1. In the Admin console, click **Settings > Configuration Export**.
2. To create a configuration package to export to a target environment, click **Create Export Package**.
3. In the **Available Configurations** pane, expand Custom and Veeva Fields and select the custom (`__c`) data model fields for the custom child objects.

The Veeva-mastered fields (`__v`) do not need to be included in the package.

4. Move the selections to the **Selected Configurations** pane.

When you move the data model fields, the custom object is also moved because Network identifies it as a dependent object.

Example

To include a custom child object called *Study* in a configuration export package, in the **Available Configurations** pane, expand the **Custom and Veeva Fields** section and select the custom fields for the **Study** object: `study_name__c` and `study_status__c`. When they are moved to the **Selected Configurations** pane, the custom child object, **Study**, is automatically be added to the pane because it is a dependent object.



1 dependency was added.

Recent Jane

NAVY LOGS USERS DATA MODEL SYSTEM INTERFACES **SETTINGS**

General Settings
Security Settings
Workflow Settings
SSO Settings
Branding Settings
Configuration Export
Configuration Import

Download Configurations

Download

⚠ The selected configurations might reference data model fields. Data model fields are not automatically added, so ensure that any required data model fields are also selected for export.

Available Configurations

Collapse All

Search Configurations

Custom and Veeva Fields

- ▶ LICENSE
- ▶ EXTERNALKEYS
- ▼ STUDY
 - created_date__v
 - custom_keys__v
 - custom_type__v
 - entity_type__v
 - entity_vid__v
 - is_externally_mastered__v
 - is_proprietary__v
 - is_veeva_master__v

Selected Configurations

Collapse All

Search Configurations

- ▼ Custom and Veeva Fields
 - ▼ STUDY
 - study_name__c
 - study_status__c
- ▼ Custom Objects
 - STUDY

For more information about exporting configurations, see "Managing Network Configurations" in the *Veeva Network Online Help*.

CUSTOM CHILD OBJECTS

The custom child objects feature was introduced in version 17R3.1.

Custom child objects can now be used in your Network instance when you need to store profile information about HCPs and HCOs that are too complex for a custom field. Whenever possible, you should use the Network standard data model, but some situations might require a custom child object so that you can master information that is essential to your business but is unique within the life sciences industry. For example, if it's important to your business to have more detailed data on an HCP's credentials (school, training level, skill, training dates), you can create a custom child object called *Training* so that you can load and edit the data before sending it to downstream systems.

If you want to extend your customer profile for unique data, creating a custom child object can give you more flexibility because it is independent of the Network release cycle and it enables your IT team to respond more rapidly to business requirements. However, custom child objects have limitations and before introducing them in your Network instance, Veeva Support and your Customer Success Manager (CSM) will work with you to ensure that it conforms well to the existing architecture and design patterns.

This feature is not enabled by default. To create a custom child object, contact Veeva Support.



Using the standard Network data model

Using the standard Network data model is always advisable whenever possible. Network has predefined entities (HCPs and HCOs) and child objects (addresses, licenses, and parent HCOs) but administrators and data managers can create custom fields for storing and editing unique data. Using the Network data model instead of creating custom child objects has the following advantages:

- Future compatibility with Network features and Veeva OpenData.
- Full integration with Veeva CRM.
- Support for all business processes (predefined business rules and data change requests).
- Easier support and debugging and reduced maintenance.

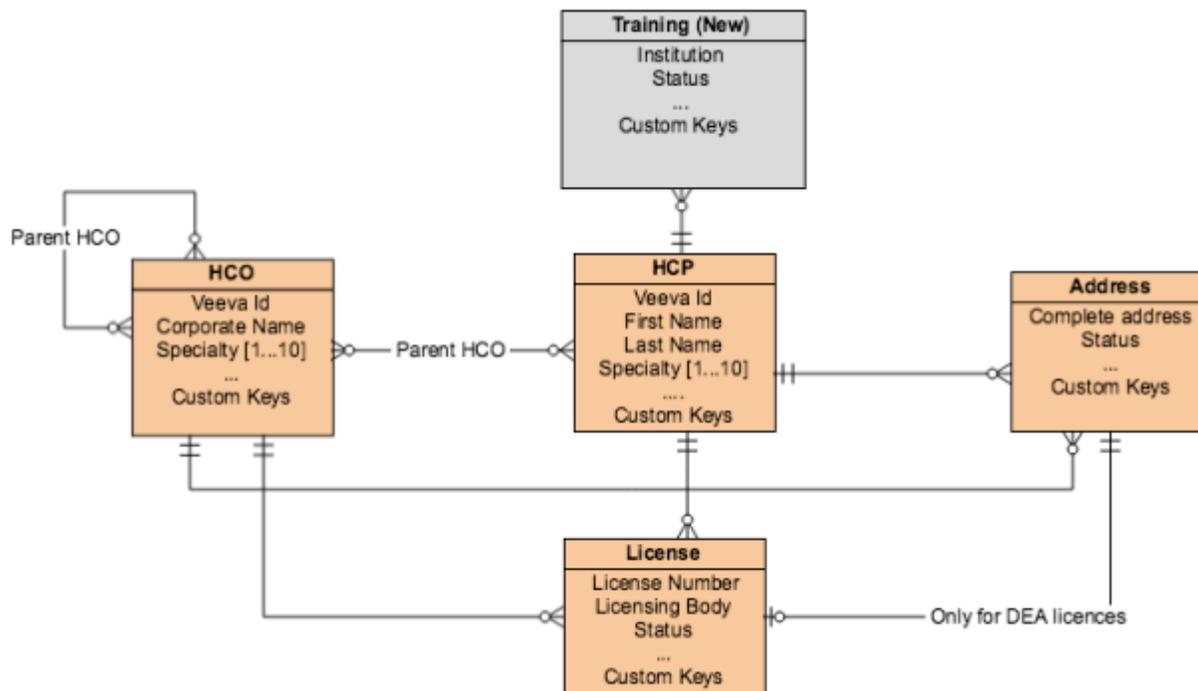
Create a custom child object

To create a custom child object, contact Veeva Support. They will work with you to ensure that this is the most appropriate option for your data. Veeva Support creates the object in your Network instance using an approved naming convention. After the custom child object has been created, it displays in the Network data model only; it does not display anywhere else in your Network instance because it is disabled by default.

Enable and configure custom child objects

When a custom child object is enabled by an administrator or data manager, it displays throughout your Network instance in the supported features; for example, on profiles, subscriptions, and so on. Custom child objects cannot be removed, so it is very important that Network administrators explicitly enable objects for their Network instance when they are ready to start loading data.

To help explain the process of creating and managing custom child objects, throughout this document we'll use a custom child object called *Training* as an example. The Training custom child object is associated with the HCP entity. Note that there is no relationship between the Training custom child object and the HCO entity or the License or Address child objects.



To enable a custom child object:

1. In the Admin console, click **Data Model > Network Data Model**.
2. In the **Quick Links** list in the left pane, click the object name link. In the example below, the custom child object is called **Training**.

NAME	LABEL	TYPE	REFERENCE TYPE	
URL_1__v	URL 1	Text		✓
URL_2__v	URL 2	Text		✓
academic_title__v	Academic Title	Reference Type	HCPAcademicTitle	✓
addresses__v	Set of Addresses	Set		✓

The Network Data Model page scrolls to the custom child object.

Note that when a custom child object is created, a series of __v default fields are automatically assigned to the object. This includes a custom status field and related reference type.



Network Data Model

Country

All countries ▾

Export

Create Custom Field

▼ Training Edit

	NAME	LABEL	TYPE	REFERENCE TYPE	
▼	created_date__v	Created Date	Date and time		✓
▼	custom_keys__v	Set of Custom Keys	Set		✓
▼	custom_type__v	Type	Text		✓
▼	entity_type__v	Entity Type	Reference Type	EntityType	✓
▼	entity_vid__v	Network ID of owner	Veeva ID		✓
▼	is_externally_mastered__v	Externally Mastered Record?	Checkbox		✓
▼	is_proprietary__v	Proprietary Record?	Checkbox		✓
▼	is_veeva_master__v	Veeva Master Record?	Checkbox		✓
▼	master_vid__v	Network Master ID	Veeva ID		✓
▼	modified_date__v	Modified Date	Date and time		✓
▼	record_delta_id__v	Delta ID	Veeva ID		✓
▼	record_merged_vid__v	Surviving Record Network ID	Veeva ID		✓
▼	record_owner_name__v	Record Owner Name	Text		✓
▼	record_owner_type__v	Record Owner Type	Reference Type	RecordOwnerType	✓
▼	record_state__v	Record State	Reference Type	RecordState	✓
▼	record_version__v	Record Version	Integer number		✓
▼	status_update_time__v	Status Modified Date	Date and time		✓
▼	vid__v	Network Entity ID	Veeva ID		✓
	training_status__c	Status	Reference Type	TrainingStatus	✓
▼	vid__v	Network Entity ID	Veeva ID		✓

The fields are related to a field set that is automatically created for the parent entity (HCP or HCO) of the custom child object. In this example, a set of fields called `training_set__c` is added to the HCP object.



Network Data Model					
Country		All countries		Export	Create Custom Field
target__c	Target?	Checkbox	BooleanReference	✔	
training_set__c	Trainings	Set		✔	
type_of_practice__v	Type of Practice	Reference Type	HCPPracticeType	✔	

The `set__c` field is a special attribute representing the relationship between a custom child object and its parent entity. When the custom child object is enabled, the `set__c` field status changes from disabled ❌ to enabled ✔.

3. Beside the custom child object name in the data model list, click the **Edit** button .

In the **Details** section, the **Object Name** and the **Parent Entities** cannot be edited. They are configured by Veeva Support. The **Description** can be changed.

Network Data Model > Edit Child Object - TRAINING

Training

Cancel Export Save

Details

Object Name TRAINING

Object Enabled? Enabled Disabled

Parent Entities HCP  

Description Training.

4. The **Object Enabled?** option should only be changed to **Enabled** when you are ready to enable the custom child object.

If you enable the custom child object and **Save** your changes now, it will be visible on profiles and other Network features that support it. However, before loading data to the object, it is important to configure it by adding countries, adding custom fields, and defining survivorship rules.



- In the **Countries** section, the countries that were added when the custom child object was created are listed. These countries cannot be removed; an error occurs if a country is removed the custom child object is attempted to be saved. To add more countries, click inside the field and add the countries that this object applies to.

▼ Countries

Choose Countries for which this object will be enabled.

▼ Fields

	NAME ^
▼	created_date__v
▼	custom_keys__v
▼	custom_type__v
▼	entity_type__v
▼	entity_vid__v

Countries

Canada × United States × |

- Russian Federation
- Slovakia
- Slovenia
- Spain
- Sweden
- Switzerland
- Turkey
- Ukraine
- United Kingdom
- United States

- In the **Fields** section, the default fields that are added for each new object are listed. Add existing fields or create new custom fields to use for this object.

▼ Fields + Add Field

	NAME ^	LABEL	TYPE	REFERENCE TYPE	ENABLED?
▼	created_date__v	Created Date	Date and time		✔
▼	custom_keys__v	Set of Custom Keys	Set		✔
▼	custom_type__v	Type	Text		✔
▼	entity_type__v	Entity Type	Reference Type	EntityType	✔
▼	entity_vid__v	Network ID of owner	Veeva ID		✔

- To add an existing field, find the field in the Network Data Model (for example, grad_year__v). Click the field name to edit it. In the **Countries** section, click the **Managed by Customer** section. In the **Network Objects** field, add the custom child object.
- To create a new custom field, click **+ Add Field** and configure the field with the required information. For example, for a custom child object for Training data, you might want to add custom fields for the institution name, training level achieved, training start and end dates, and so on. If the new custom field is a Reference field reference codes must also be added, if required.



Create Custom Field

Cancel Save

▼ **Properties**

Name —C ? Effective Version ?

Type ?

Length ?

Enabled?

Description

▼ **Countries**

Countries	Network Objects
Countries *	<input type="text" value="Canada X United States X"/>
Network Objects *	<input type="text" value="Training X"/>
Rule Type	<input type="text" value="Default Value"/> ▼
Value	<input type="text"/>
Required / Update ?	<input type="checkbox"/>

Remove Done

[Add Country Group](#)

▼ **Labels**

Language	Label
<input type="text" value="English"/> ▼	<input type="text" value="Institution"/>

[Add Label](#)

- The **Duplicate Detection Rule** section enables you to define the unique fields for Network to use for determining duplicates and merging custom child records. If the IDs or all the defined field values match, then the custom child objects are treated as duplicates and the records are merged.

For example, for a Training custom child object, matching on fields such as Institution and Training Skill would find duplicates because those field values would be the same among sources.



Matching on fields such as Training Start Date and Training End Date fields would not be advisable because those date values could vary slightly among sources, so duplicates would not be found.

If no fields are defined, Network matches on custom keys, alternate keys, and Network entity IDs (VIDs).

▼ Duplicate Detection Rule

Merge records if an ID is the same or if ALL of the following field match:

Match Fields

You can select up to 10 fields. Some system fields cannot be used for matching and are dimmed in the list.

- 8. In the **Summary Fields** section, select two or three fields that will be used for the collapsed view of the child object in the Network UI. More fields can be selected, but fewer fields are recommended for the summary. Use the control  to reorder the fields for the Ranking (#) column.

▼ Summary Fields

Summary fields appear in the collapsed view of the Child Object on the Profile Page. Choose which fields appear, and in which order, using the controls below.

#	FIELD
1	Training Skill
2	Institution

[+ Add Field](#)

For example, the **Training Skill** and **Institution** fields display for the Training custom child object when it is collapsed on an HCP's Profile page. The summary fields are used anywhere that a brief summary of the custom child object displays in the Network UI.

▼ Trainings

Training Skill	General Surgery
Institution	University of Toronto

[Add Training](#)

- 9. In the **Regional Labels** and Regional **Plural Labels** sections, type the localization for the child object's display name. Both labels must be defined for a language.



Regional Labels

Language	Name
English	Training

[Add Language](#)

Regional Plural Labels

Language	Name
English	Trainings

[Add Language](#)

10. Use the **Source Rankings** section to define the priority of sources for the custom child object. For example, data for custom child objects might be bought from specific sources, so they should be prioritized above of the sources of your standard data.
 - **Default Rankings** - The default ranking for your Network instance are selected by default. To view the default rankings, click **System Interfaces > Source Rankings**.
 - **Override Rankings** - Click to override survivorship for this custom child object. Use the control to reorder the sources for the Ranking (#) column.

Source Rankings

Use Default Rankings
 Override Rankings

	#	NAME	DESCRIPTION
	1	CPSO	College of Physicians and Surgeons of Ontario
	2	PAMF	PAMF
	3	Third_party_source	Third_party_source
	4	change_request	change_request

11. If you are ready to enable the custom child object so it's visible on the profile page and other supported Network features, beside the **Object Enabled?** option at the top of the page, click **Enabled**.

Note: After you enable a custom child object in your Network instance, it cannot be removed.

You can save the custom child object without enabling it.

12. **Save** your changes.

The custom child object is enabled and ready to have data loaded.



Export the data model

New worksheets are added to the data model when custom child objects are created. When you export the data model, the following columns are populated for each object:

- Field Name
- Localized UI Label
- Status
- Type
- Length
- Custom Field?
- Network Field?
- Field Description
- CRM Field Group Name
- Available in <Country>

	A	B	C	D	E	F	G	H	I	J	K
	Field Name	Localized UI Label	Status	Type	Length	Custom Field?	Network System Field?	Field Description	CRM Field Group Name	Available in Andorra (AD)	Available in Argentina (AR)
1											
2	created_date_v	Created Date	Active	Datetime	25	False	True	Date this record was created		False	False
3	custom_keys_v	Set of Custom Keys	Active	Set		False	False	Set of custom keys for this Record		False	False
4	custom_type_v	Type	Active	String	25	False	True	Subtype of Custom Child Objects		False	False
5	entity_type_v	Entity Type	Active	Reference	10	False	False	Entity Type		False	False
6	entity_vid_v	Network ID of owner	Active	VeevaId	18	False	False	Entity Id		False	False
7	institution_c	Institution	Active	String		True	False	institution		False	False
8	is_externally_mastered_v	Externally Mastered Record?	Active	Boolean	10	False	False	Is this an externally mastered record		False	False
9	is_proprietary_v	Proprietary Record?	Active	Boolean	10	False	False	Is this data proprietary to the customer		False	False
10	is_users_mastered_v	Users Mastered Record?	Active	Boolean	10	False	False	Is this a Users mastered record		False	False

Load data for custom child objects

Administrators and data managers can update or add new source subscriptions to load data for the new custom child object.

To configure source subscriptions, in the Admin console, click **System Interfaces > Source Subscriptions**.



Training Data Details

Advanced Mode Clone Start Job Cancel Save

- ▶ Details
- ▼ Settings

GENERAL SETTINGS

- Allow File Reprocessing ?
- Apply Updates & Merge ?
- Job Error Log ?

MATCH SETTINGS

- Action for Unmatched & Suspect Match: Create Valid Records ?
- Match Against OpenData ?
- Source Dedupe: Select options ?

EXPORT SETTINGS

- Data Group Analysis: Select options ?
- Match Analysis: Select options ?
- Match Analysis Advice Filters: 3 items selected

▼ Source Files

FTP Path ? inbound/training

File Definitions ?

File Name	<input type="text" value="TRAINING"/>	Alias	<input type="text" value="TRAINING"/>
Key Column(s)	<input type="text" value="training_object_id,amsid__v"/>	Text Qualifier	<input type="text" value=""/>
Format	<input type="text" value="Delimited"/>		
Delimiter	<input type="text" value="."/>		
Header Row?	<input checked="" type="checkbox"/>		

File Name	<input type="text" value="HCP"/>	Alias	<input type="text" value="HCP"/>
Key Column(s)	<input type="text" value="AMS_id"/>	Text Qualifier	<input type="text" value=""/>
Format	<input type="text" value="Delimited"/>		
Delimiter	<input type="text" value="."/>		
Header Row?	<input checked="" type="checkbox"/>		

Add File



The following source subscription settings apply to custom child objects:

- **Source Dedupe** - Similar to Network child objects (addresses, licenses, and parent HCOs), you can select custom child objects so that duplicates are merged during data loading. Network uses the duplicate detection rules that you configured in the custom child object for matching.
- **Match Analysis** - Select the custom child object so that you can track any that were matched and merged during the source subscription job. A separate log file will be created for the custom child object.
- **File Definitions** - Provide the name and alias of the source file for the custom child objects. You can also define the qualifier and delimiters for the file.
- **Model Map** - You can configure a model map so that data can be loaded for custom child objects. Configuring a model map for a custom child object is similar configuring one for addresses.

▼ Modelling & Normalization

Model Map ⓘ

```
[
  {
    "entity": "HCP",
    "from": "HCP",
    "attributes": [
      "HCP.* AS *"
    ],
    "customkeys": [
      {
        "value": "HCP.AMS_id"
      }
    ]
  },
  {
    "entity": "TRAINING",
    "from": "TRAINING JOIN HCP ON HCP.AMS_id = TRAINING.amsid__v",
    "attributes": [
      "TRAINING.* AS *",
      "HCP.VDM_ENTITY_ID AS VDM_FKENTITY_ID"
    ],
    "customkeys": [
      {
        "value": "TRAINING.training_object_id"
      }
    ]
  }
]
```

Field Normalization ⓘ

```
{}
```

- **Field Normalization** - Define the field mappings from columns in an incoming source file to the fields in the Network data model.
- **Network Expression Rules** - File preparation, transformation, and after update rules can be created for custom child objects.



For example, you could create a file preparation rule to convert the text in the Institution field from all uppercase to proper case.

▼ Network Expression Rules ⓘ

RULE POINT	FILE / ENTITY	RULE
File Preparation ⇅	TRAINING ⇅	<pre>["institution__c = PROPERCASE(institution__c)"]</pre>

[Verify](#) [Add Rule](#)

NEX rules can be used to make changes to the data as it is loaded through the source subscription.

Custom child objects cannot be used to define data groups and match rules in the current release. This means that a parent entity (HCO or HCP) cannot be matched based on the data in the custom child object, so these settings do not apply to custom child objects.

After you've configured a source subscription to load, you can run the job to load data into the custom child object. Before running the job, ensure that you have fully configured your custom child object, particularly the duplicate detection rules so that you do not load duplicate data into your Network instance. Testing the subscription in a Sandbox instance is recommended.

Job details

After a source subscription runs, the custom child object is included in the summary data that was processed for the job on the Job Details page. In this example, job statistics for the Training custom child object display.



Source Subscriptions > custom_child_training > Job Details (ID: 82310)

Job Details (ID: 82310)

Cancel Job

▼ Overview

System	3rd_Party_System	Subscription	custom_child_training
Start Time	2017-11-06T11:46:00-05:00	Job ID	82310
Duration	a few seconds	Percent Complete	100.00%
Current Stage	FinalStage	Outcome	COMPLETE
Started By	Nadya Admin	Trigger	MANUAL
Number of Files Processed	2	Number of Bad Records	0

▶ Job Settings Summary

▼ Files Loaded Summary

FTP Path inbound/training
Folder / ZIP File training

ALIAS	FILE NAME
HCP	HCP.csv
TRAINING	TRAINING.csv
HCO	HCO.csv

▼ Data Load Summary

ALIAS	ROWS READ	ROWS PARSED
HCP	5	5
HCO	5	5
TRAINING	10	10

▼ Processed Data Summary

	RECORDS PROCESSED
HCP	5
HCO	5
Address	0
License	0
Training	10
Parent HCO	0
Custom Keys	0

▼ Match Summary

	NOT MATCHED	ACT MATCHES	ASK MATCHES
HCP	5	0	0
HCO	5	0	0

▼ Job Result Summary

	TOTAL	ADDED	CANDIDATES ADDED	UPDATED	MERGED	INVALIDATED
HCP	5	5	0	0	0	0
HCO	5	5	0	0	0	0
Address	0	0	0	0	0	0
License	0	0	0	0	0	0
Training	10	10	0	0	0	0
Custom Keys	20	20	0	0	0	0





Feature considerations for custom child objects

Many of the features in your Network instance support custom child objects. For more information about these features, review the following sections.

Profile

On a record profile, like standard Network child objects, custom child objects have their own sections. When the section is collapsed, the summary fields that you defined when you configured the custom child object display.

For records where the primary country is the US, the redesigned profile also supports custom child objects. For more information about viewing custom child objects in the new profile, see the topic called "New Profile" in these *Release Notes*.

In this example, the **Training** section displays for the Training custom child object. The field is summarized with the **Status** and **Institution** fields.



Recent > Robert Smith



 **Robert Smith** 



Network Entity ID: 931340007765835807

Verteo ID: V-K36ZB2VA0Z

Primary Specialty: Gynecological Oncology

HCP Type: Prescriber

Modified Date: 2017-11-06 13:14:21

Source Keys: [3rd_Party_System](#)

- ▶ Primary Information
- ▶ Addresses
- ▶ Parent Affiliations
- ▶ E-Contacts
- ▶ External Identifiers
- ▶ Licenses
- ▶ Educational Information
- ▶ Personal Information
- ▶ Custom Fields
- ▼ Trainings

Training Skill General Surgery 

Institution University of Toronto

- ▶ Record Information

When you expand the section, all of the fields that you enabled for the custom child object display; this does not include the fields that are automatically added to the object when it is created by Veeva Support.



▼ **Trainings**

Status Active	Institution University of Toronto
Training End Date 2012-05-18	Custom Keys 3rd_Party_System
Training Level Post Grad, Yr 7	Training Skill <input type="text" value="General Surgery"/>
Training Start Date No Value	

[Add Training](#)

Custom child object fields are read-only for administrators. Data managers and data stewards can edit the fields to add or edit information. The changes are automatically approved and updated.

Revision history

From the Profile, the Revision History page displays all of the changes that have occurred on the record including changes to custom child objects.

In this example, a data steward added the training level data for the training custom object.

VERSION	TIMESTAMP	SYSTEM	ACTION
3.0	2017-11-07 16:48:02	Network Change Requests	Update from change request
2.0	2017-11-06 13:14:21	Network Change Requests	Update from change request
1.0	2017-11-06 11:46:41	3rd Party System	Add from source

CHANGE REQUEST SUMMARY	
DCR ID 931346856941846559	System No Value
Approver System	Requestor linda.steward@verteo.veevanetwork.com
Approver Notes No Value	Requestor Notes Added training level.

FIELD	VERSION 2.0	VERSION 3.0
Date Modified	2017-11-06 13:14:21	2017-11-07 16:48:02

TRAININGS		
Training - Veeva ID: 931340007765835808		
Training Level	No Value	Post Grad, Yr 7



Note that the **Network Change Requests** system entries include updates that data stewards have made directly on the profile page. So changes that data stewards have made to custom child objects are included in that system.

Data lineage

The data lineage enables you to view detailed information by source, including details for custom child objects updates across sources. For custom child objects, updates made by data stewards from the Profile page are included in the `change_request` source.

Search (term: university of toronto) > Robert Smith > Data Lineage

Select custom keys [dropdown] [refresh] [share]

Data Lineage

Select all [Unmerge](#)

Jump to a section [dropdown]

Customer Master Record	<input type="checkbox"/> 3rd_Party_System HCP COP00111	<input checked="" type="checkbox"/> change_request HCP 931340007765835807
-------------------------------	--	---

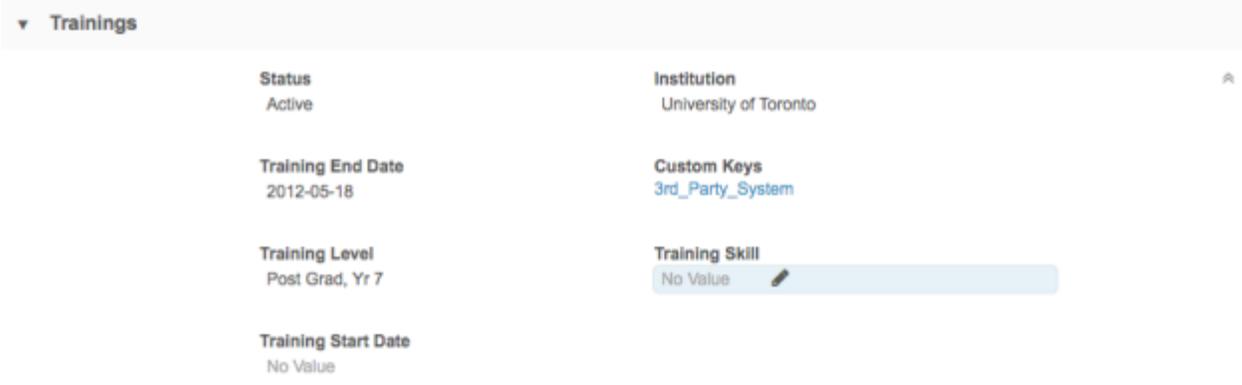
- ▶ Job Details
- ▶ Primary Information
- ▼ Addresses
- ▼ Parent Affiliations
- ▼ E-Contacts
- ▶ External Identifiers
- ▶ Educational Information
- ▶ Personal Information
- ▶ Custom Fields
- ▼ Trainings
 - Training 1 ▼ Active University of Toronto
 - Active University of Toronto
- ▶ Record Information



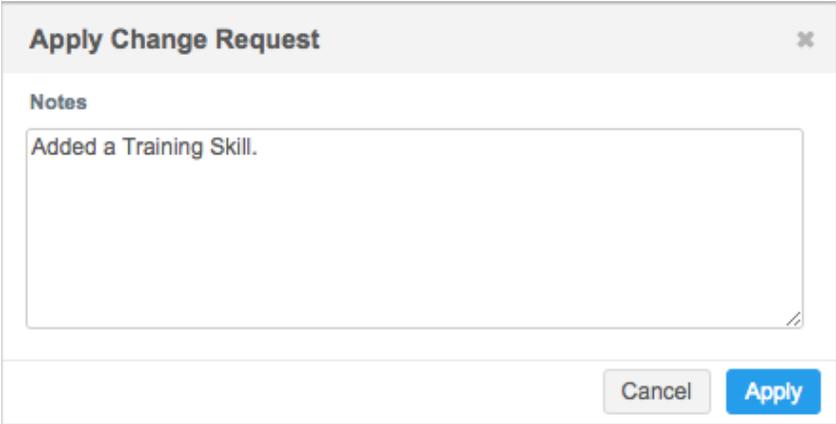
Stewarding custom child object information

The data change request workflow is not supported for custom child objects in the current release. Data stewards and data managers can edit custom child object data directly on the Profile page and their changes are automatically applied. Administrators and standard users have read-only access to custom child objects.

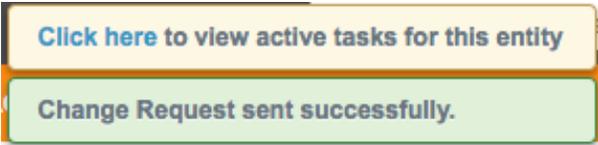
To edit a custom child object field, hover over the field and click the **Edit**  icon.



When a data steward saves custom child object changes, they can add a comment in the **Apply Change Request** dialog.



Messages that a change request has been sent and was accepted display at the top of the profile page. Network automatically accepts the change, but data stewards can click the link to review the task.



On the change request task, data stewards can see the update and that it was automatically approved by Network.



Search (term: university of toronto) > Robert Smith > Change Request - Robert Smith

Change Request

	Previous Value	Change Request	
> TRAINING 2			<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Status	No Value	Active	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Institution		No Value	
Training Skill	No Value	General Surgery	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

REQUEST SUMMARY

Task ID
931352281268015903

Subject
Robert Smith ☆
Gynecological Oncology

Creator
linda.steward@verteo.com

Source
Entity Profile Editor

Date Created
2017-11-08 15:47:31

Requester Comments
Added a Training Skill.

Assignee
linda.steward@verteo.com

Resolution Notes
System approved - Created by data steward.

Status
Processed

When users review the data lineage or revision history for the record, any updates made by data stewards from the profile page are categorized as a change request.

Reports

Network users with access to advanced reporting can create ad hoc queries for custom child object data. For example, a user could create an ad hoc query to find all of the HCPs that graduated from a particular school in the last ten years. The results can be exported and shared.

Ad Hoc Queries

Database Last Updated: Nov 9, 2017, 12:12am Next Update: Nov 10, 2017, 12:12am

Save Run

Record Details Counts & Summaries **Advanced**

```

1 select * from training
2 where institution__c = 'University of Toronto'
3 and training_end_date__c between '2007-01-01' AND '2017-01-01'

```

Record State:
 ⚠ Queries selecting all columns take much longer to process.

Results (76 records)

CREATED DATE	ENTITY TYPE	NETWORK ID OF OWNER	INSTITUTION	EXTERNALLY MASTERED RECORD?	PROPRIETARY RECORD?	VEEVA MASTER RECORD?	NETWORK MASTER ID	MODIFIED DATE
2017-11-06 11:46:41	Health Care Professional	931340007765835807	University of Toronto	False		False		2017-11-06 11:46:41
2017-11-06 11:46:41	Health Care Professional	931340007767474207	University of Toronto	False		False		2017-11-06 11:46:41
2017-11-08 15:47:32	Health Care Professional	931340007765835807	University of Toronto	False		False		2017-11-08 15:47:33
2017-11-06 11:46:41	Health Care Professional	931340007765835807	University of Toronto	False		False		2017-11-07 16:48:02
2017-11-06 11:46:41	Health Care Professional	931340007767408671	University of Toronto	False		False		2017-11-06 11:46:41
2017-11-06 11:46:41	Health Care Professional	931340007767408673	University of Toronto	False		False		2017-11-06 11:46:41

Note: Custom child objects are not visible in the **Record Details** and **Counts & Summaries** tabs in the current release.



Target subscriptions

Data for custom child objects can be exported to downstream systems. In the **File & Field Selection** section, the object is listed but is set to **Do Not Export** by default. Users can change the setting so that all, or some, custom child objects are exported.

The screenshot shows a section titled "File & Field Selection" with a dropdown arrow. Below the title, there are several rows of settings for different custom child objects. Each row consists of the object name followed by a dropdown menu. The settings are as follows:

Object Name	Export Setting
HCP	Export All Fields
HCO	Export All Fields
Address	Export All Fields
License	Export All Fields
Parent HCO	Export All Fields
Training	Do Not Export
Custom Keys	Do Not Export

Creating filters and defined queries on the parent entity is not yet supported for custom child objects.

Merge and unmerge

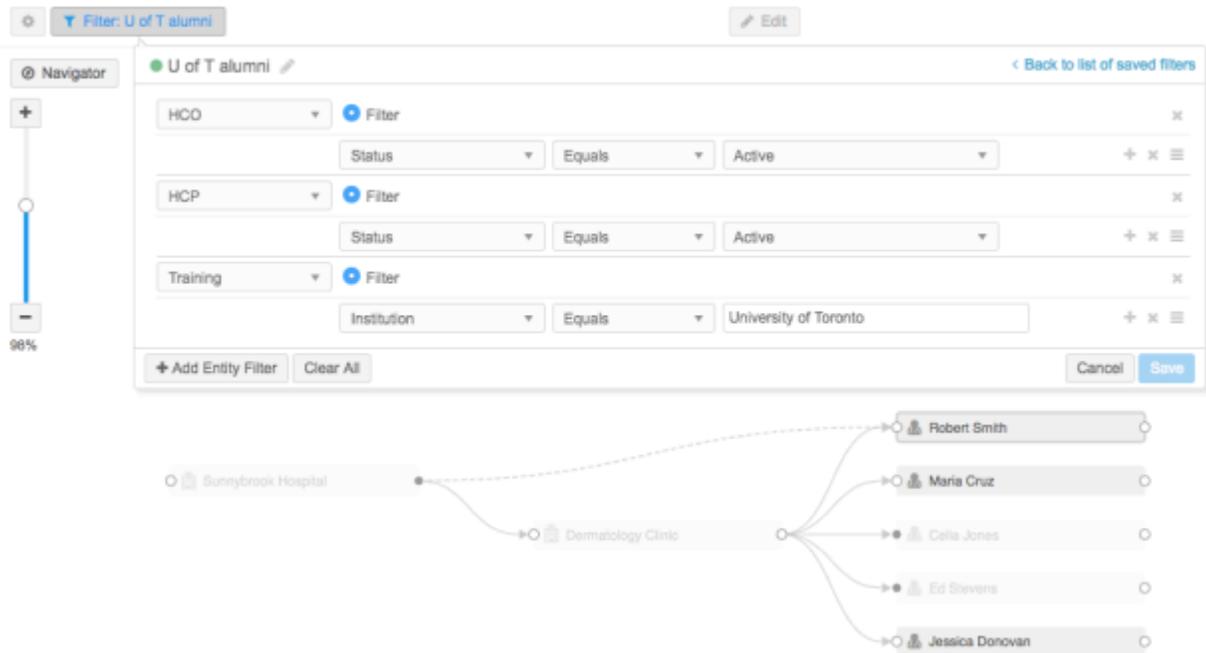
When data stewards merge records, custom child object information is consolidated and any duplicates are merged. If records need to be unmerged from each other, the custom child object information is restored to the respective records.

Network Explorer

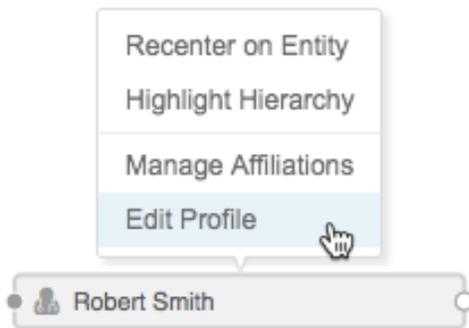
Users can filter hierarchies in Network Explorer based on custom child object data. For example, users can filter a hospital's hierarchy to identify all of the HCPs that are alumni of a specific medical school. Network Explorer highlights the entities that match the filter criteria.



Network Explorer



Custom child objects can be viewed by all users in the record profile in Network Explorer. Data stewards and data managers have edit access to the record profile, but cannot edit custom child objects there; custom child objects can only be edited on the Profile page.



Primary fields

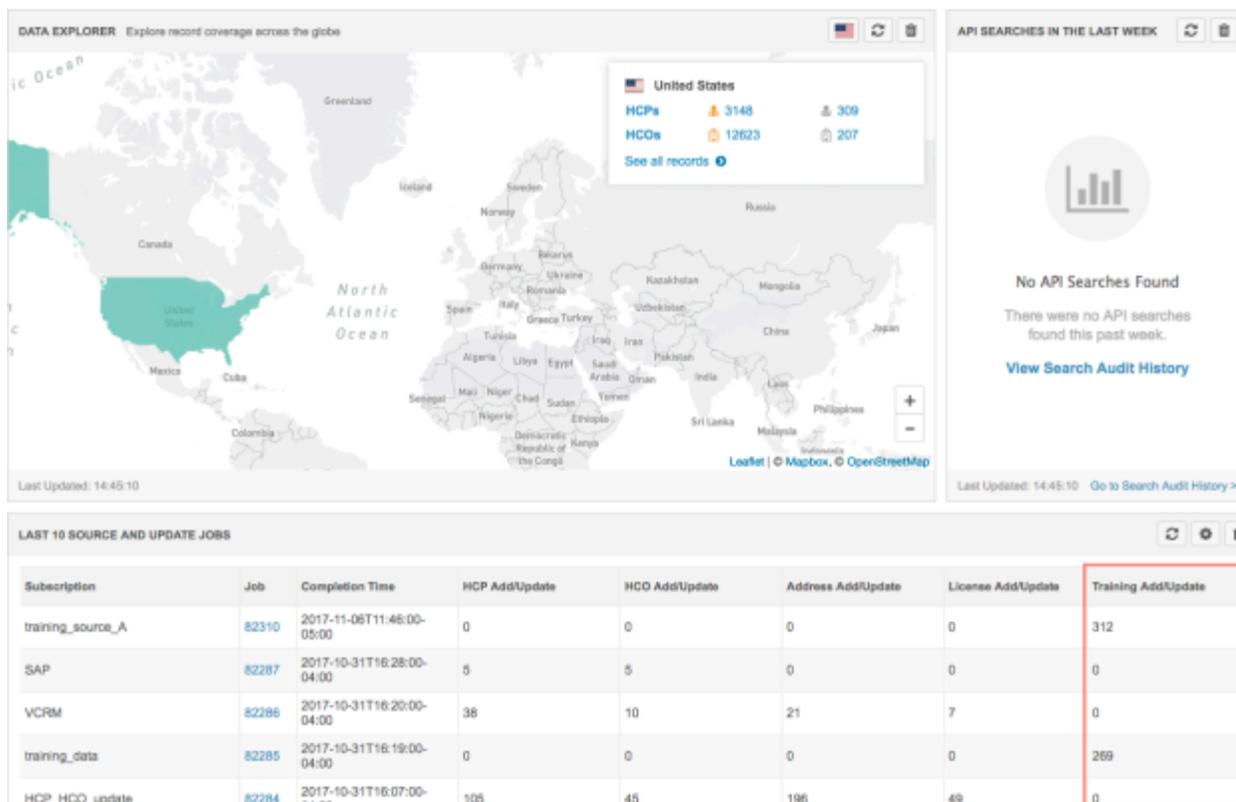
Administrators can create Unique Checkbox primary fields for custom child objects. Using this type of primary field, users can define a primary address, license, or Parent HCO for the custom child object.

For more information, see the topic called "Unique Checkbox primary fields" in the *Veeva Network Online Help*.



Home dashboard

Custom child object job statistics display on the Home dashboard for administrators and data managers.



Logging

Administrators can view tracking for all changes to custom child objects in the following logs:

- System Audit History
- Reporting Audit History

To review the logs, in the Admin console, click **Logs**.

Data maintenance

Administrators can create child inactivation data maintenance jobs to inactivate custom child objects. This helps to preserve data quality so that all child objects on an inactive HCOs or HCPs are also inactivated. Select the child object in the **HCP/HCO Subset Options** section.



New Child Object Inactivation Job

Cancel Save

Details

Name

Action
Automatically inactivate child objects of specified entities.

Description

Settings

Allow File Reprocessing ? Job Error Log ?

Inactivation Log ?

Schedule

Trigger Scheduled Manual

HCP Subset Options

Choose the child objects to inactivate

Address

License

Parent HCO Relationship

Training

Choose the HCP records that will have its child objects inactivated

FTP

Use Filters

Basic Mode Advanced

Reporting Database Last Updated: Nov 10, 2017, 12:12am Next Update: Nov 11, 2017, 12:12am

FIELD	CONDITION	VALUE	AND/OR
Status	In	Retired X Inactive X Dead X	X

[+ Add Filter](#)

API

Custom child objects are supported for the following areas of the Network API:

- **Retrieve** - used for retrieving specific HCPs or HCOs, including any related custom child objects.
- **Metadata** - used to retrieve the full Network data model, including custom child objects.

For more information about the changes to the API, see the *API* section in these Release Notes.



Features that do not yet support custom child objects

Custom child objects are not supported for the following Network features in this release:

- Ad Hoc Match
- Concur Connector
- Data change requests (Any changes to the data must be provided by the data source and loaded through a source subscription, through NEX rules in the source subscription, or changed on the profile by data stewards or data managers)
- Data validation rules
- Data quality reports
- Match (HCOs or HCPs cannot be matched using custom child object data)
- Network-CRM bridge (This means that custom child objects are either not loaded in Veeva CRM (recommended) or must be loaded in bulk using a custom integration. Future Network versions will include bridge support for custom child objects).
- Search
- Third party master (data loading and DCR support is not supported)

Removing custom child objects

After a custom child object has been created and enabled in your Network instance, it cannot be removed. The object can be invalidated so that it is not exported to downstream systems and cannot be found during search. Any features that support the custom child object will continue to display the object in the Network UI; for example, the **Training** section will continue to display on the Profile page.

Limitations of custom child objects

If the Network data model is not appropriate for the data that you want to store, use a custom child object. Before introducing a custom child object in your Network instance, it's important to understand that they have the following overall limitations:

- **Ownership and linking** - They must be owned by an entity (HCP or HCO). Custom child objects cannot relate to other objects. For example, an address cannot be linked to a custom child object.
- **Security** - Security rules are driven by the HCO/HCP. If users can view the HCO/HCP, they can view all related child objects.

ALTERNATE KEY SURVIVORSHIP

Administrators can now apply logic to custom fields to tell Network which alternate key to keep when records are merged. When records are merged, the default survivorship rules decide that the alternate key of the winning record remains. Sometimes this behavior is not desirable and the workaround to recover the lost alternate key is time-consuming. Now, you can control which alternate key stays on the merged record by specifying survivorship based on the value of a specific field. For example, you can tell Network to keep the alternate key of the highest ranked or targeted HCP on the merged record.

This feature is not enabled by default. To enable this feature for your Network instance, contact Veeva Support.



Define survivorship rules

When records are merged, the default survivorship rules keep the alternate key of the winning record. Administrators can update the custom fields for alternate keys to tell Network to override the merge survivorship rules by a specific field and value.

1. In the Admin console, click **Data Model > Network Data Model**.
2. Find and click on the alternate key field; for example, `altkey__c`.
3. In the **Survivorship Rules** section, select the **Override by Value** option.

4. In the **Dependent Field** list, select the field that will determine survivorship of the alternate key. The dependent field that you choose for determining alternate key survivorship is only looked when the records are being merged.

The list contains all of the fields for the Network objects defined for each entity type that are enabled and are one of the following types:

- Date (no time)
- Date and Time
- Integer Number
- Decimal Number

5. In the **Winning Criterion** field, select the appropriate value.

For example, if the **Dependent Field** is `rank__c`, the **Winning Criterion** should be **Lowest Value** so that the alternate key on the HCP record who is considered highest ranked (lowest integer value) in the merge remains.

Example

Record A Alternate Key / Rank	Record B Alternate key / Rank	Winning Criterion	Alternate Key on Merged Record
VSEB-78D-2S3 rank__c: 5	VT8B-2ZK-GA6 rank__c: 3	Lowest Value	VT8B-2ZK-GA6

6. **Save** your changes.



When the supported merge actions run, survivorship of the alternate key will be based on the dependent field that you specified.

Supported merge actions

Alternate key survivorship logic is supported on the following merge actions:

Merge Action	Result using default survivorship rules	Result using Survivorship by Value
Find Suspect Match	Alternate key takes the value from the winning record.	The winning alternate key is determined by the dependent field.
Veeva OpenData merge	Alternate key takes the value from the winning record.	The winning alternate key is determined by the dependent field.
Bulk Merge (includes the data deduplication data maintenance jobs)	Alternate key takes the value from the winning record.	If the subscription property is set to true: <code>job.merge.overrideAlternateIdentifier": "true"</code> survivorship is applied and the winning key is determined by the dependent field.
Unmerge	The alternate key on the original record is retained. Source survivorship will be run to either use an alternate key from the source or to generate a new alternate key.	The winning alternate key is determined by the dependent field.
Locally managed (Under Review) record merges into orange record	The alternate key from the record that is Under Review is retained.	The alternate key from the record that is Under Review is retained.
Source subscription	The alternate key from the highest ranked source is retained. No merge or survivorship rules are applied unless the advanced subscription property is set to true: <code>job.merge.overrideAlternateIdentifier": "true"</code>	The winning alternate key is determined by the dependent field. No merge or survivorship rules are applied unless the advanced subscription property is set to true: <code>job.merge.overrideAlternateIdentifier": "true"</code>



Examples

Example 1 - Veeva OpenData merge

An OpenData data steward merges two records together (Bob Woods into Robert Woods) in the OpenData master instance. When the record comes down to Verteo's customer instance during an OpenData subscription job or an adhoc download, the records are updated and the merge is performed there.

In the Verteo Network instance, alternate key survivorship is defined using a `last_contact_date__c` field (custom field); where, the alternate key value on the most recently contacted record should be retained on the winning record.

▼ Survivorship Rules ⓘ

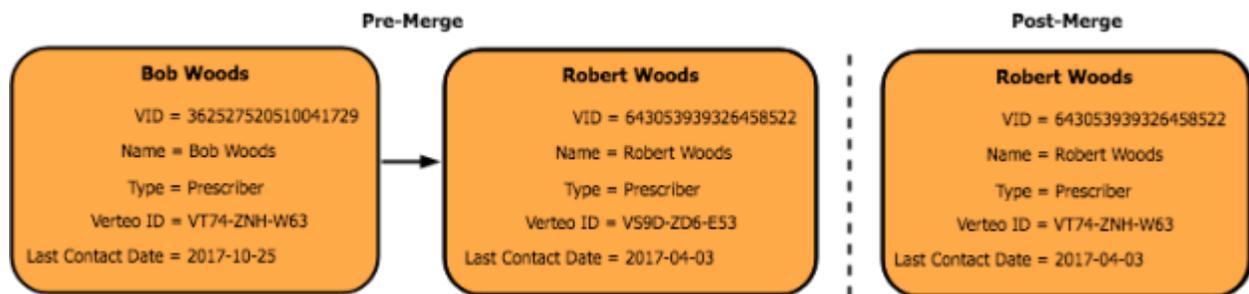
Rankings
 Override Default Override by Source Override by Value

Select a field and a criterion to determine the winning value. Default survivorship rules will apply if this field is not available for your country group.

Dependent Field

Winning Criterion

Result: The value of the alternate key on the winning record is VT74-ZNH-W63 because Bob Woods was most recently contacted.



Example 2 - Find Suspect Match merge

A Verteo customer data steward merges two records. In the Verteo Network instance, alternate key survivorship is defined using a `tier__c` field (custom field); where, the alternate key on the record with the highest tier (lowest integer value) should be retained on the winning record.



▼ Survivorship Rules ⓘ

Rankings
 Override Default Override by Source Override by Value

Select a field and a criterion to determine the winning value. Default survivorship rules will apply if this field is not available for your country group.

Dependent Field
 tier__c

Winning Criterion
 Lowest Value

Result: The value of the alternate key on the Livia Roy record is retained because it has the highest tier.



Tiebreaker rules

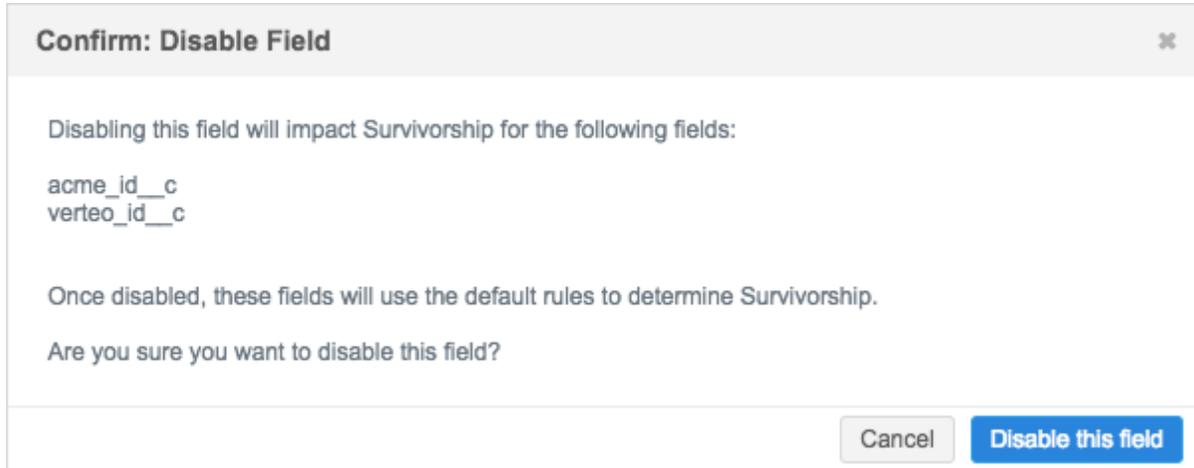
In situations where the alternate keys of both records have the same value for the dependent field, the surviving alternate key will be determined using tie breaker rules.

Merge action	Tiebreaker rules
Bulk merge, Unmerge, OpenData merge, Find Suspect Match	The alternate key from the merge winner is retained.
Source subscription	The following rules are applied in order: <ol style="list-style-type: none"> The alternate key from the newest record (last modified date) is retained. The alternate key from the merge winner is retained.



Disabling dependent fields

If a field that you are using as a **Dependent Field** to determine survivorship for alternate keys is going to be disabled, a confirmation dialog displays. The dialog contains the impacted fields.



If the field is disabled, the default rules will be used to determine survivorship again; the alternate key from the winning record in a merge is retained.

Fixing alternate keys from a merge

If merging records results in having the wrong alternate key on the winning record, it can be fixed using subscription jobs.

To update alternate keys:

1. Using a target subscription, export the applicable records. Ensure that the exported .csv file includes the following data:
 - Network entity ID (VID)
 - Alternate key
 - Dependent field (for example, rank__c)

You can also use Network reports to query the applicable records for the required data. For example, if you know that there was a problem with merged HCPs within the past month, you could run the following query to find the HCPs that were updated within the last 30 days.



General updates

AMAZON WEB SERVICES MIGRATION

Veeva is moving its worldwide computing infrastructure from managed data centers to the Veeva virtual private cloud (VPC) running on Amazon Web Services (AWS). The move began in the second half of 2017 across all Veeva product lines.

Veeva Network's PODs migration is scheduled for the following dates:

- **Sandbox PODs:** March 10th, 2018. All sandbox PODs were successfully migrated.
- **Production PODs:** April 14th, 2018 from 9am to 9pm PST. During this time, Veeva Network will be unavailable.

Note: POD IP addresses will be updated. Firewall whitelist updates may be required for your corporate network if IP restrictions are in place. For Veeva Network IP ranges, see FAQs Network-AWS migration, or contact Veeva Support.

For questions about the transition to AWS, contact your Customer Success Manager or Veeva Support. You can also reference our AWS FAQ page in the Network community.

SECURITY UPDATES

As part of the 17R3.2.1 release, the SSL certificate for *veevanetwork.com* has been updated. If your corporate security policy requires, contact Veeva Support to obtain the latest certificate.

BROWSER SUPPORT

Performance improvements have been made for Internet Explorer 11. Profile, search, and data change request (DCR) pages now load more quickly for users using this browser and version.

The following operations are faster for these pages:

Data Change Requests

- Clicking a profile
- Opening a DCR
- Accepting a DCR
- Verifying an address
- Saving a DCR
- Re-assigning a task
- Applying changes

Search

- Displaying results
- Filtering on record type
- Previewing a profile

Profile

- Using Quick links
- Selecting a date
- Selecting a reference value



API

The Network API is updated to v14.0.

FILTERING MAIL ONLY ADDRESSES

Administrators can now ensure that Mail Only address types are filtered from API searches so that they are not available in downstream systems. This includes filtering the addresses out of Veeva CRM's Network Account Search when users search and download new accounts into CRM. Mail Only addresses are often the HCP's home address, so filtering them ensures that field reps do not mistakenly use the address for sending pharmaceutical samples or sales visits.

Some customers have created NEX rules in their Network instance to filter Mail Only addresses from updates from Veeva OpenData (subscriptions and ad hoc downloads). The NEX rules filter the addresses from the Retrieve API, which also hides the addresses in the Network user interface. Now, customers can be assured that these addresses are also not exposed to users through this enhancement to the Search API, which is flagged through a permission on data visibility profiles. Using a combination of NEX rules and this data visibility profile permission, Mail Only addresses should not be exposed to Network users.

This feature is enabled by default in your Network instance.

Filter addresses

To hide Mail Only addresses from the Search API, administrators can set a permission in data visibility profiles.

1. In the Admin console, click **Users > Data Visibility Profiles**.
2. Select a data visibility profile.
3. Click **Edit**.
4. In the **Permissions** section set **Hide Mail Only Addresses in Search API** to **True**.
5. **Save** your changes.



▼ Permissions	
Country Specification	United States
HCP Visibility	All
HCO Visibility	All
Read-only access	False
Candidate Visibility	False
HCP Opt Out Visibility	True
Can download reports	False
Ad Hoc match	True
Hide Mail Only Addresses in Search API	True

Users assigned to this data visibility profile will no longer see Mail Only addresses in API searches or Veeva CRM's Network Account Search.

API UPDATES FOR CUSTOM CHILD OBJECTS

Custom child objects are supported for the Retrieve and Metadata API for Network API version 13.0 and higher.

Metadata API

The Retrieve Object Types Metadata API is updated to include the following value in the Response to support custom child objects:

- `status` - Returns all types regardless of the status.



Example response

```
{
  "responseStatus": "SUCCESS",
  "objectTypes": [
    {
      "name": "HCP",
      "description": "HCP",
      "status": "ACTIVE"
    },
    {
      "name": "HCO",
      "description": "HCO",
      "status": "ACTIVE"
    },
    {
      "name": "ADDRESS",
      "description": "Address",
      "status": "ACTIVE"
    },
    {
      "name": "LICENSE",
      "description": "License",
      "status": "ACTIVE"
    },
    {
      "name": "PARENTHCO",
      "description": "Parent HCO",
      "status": "ACTIVE"
    },
    {
      "name": "CUSTOMKEY",
      "description": "Custom Keys",
      "status": "INACTIVE"
    }
  ]
}
```

RETRIEVE MERGE/UNMERGE API

The Network API now includes methods to retrieve merges and unmerges for a specified date. This enables downstream systems to receive and process merges and unmerges very quickly after they occur. Previously, downstream systems typically received merges and unmerges using target subscriptions so there was a time lag for this data. The results from each call are limited to 100. If more results are available, you can run subsequent requests using the offset parameter to get additional pages of results.



Retrieve Merge API

Merges include the results of events that occurred in your Network instance. Merges that were initiated by Veeva OpenData on a master instance are included if the surviving and losing record of the merge have been downloaded to your instance.

The following enhancements are supported with v14.0 only.

Compatibility

This API uses the GET and POST HTTP methods. It is supported with Network API v14.0.

Syntax

```
https://<DNS>/api/<version>/event/merge
```

where

- *DNS* is the URL for your API service
- *version* is the API version

Parameters

Name	Type	Required?	Description
sinceDate	Date	No	Epoch time in milliseconds or a date in ISO 8601 format. If this parameter is not specified, the results are from the last hour.
offset	Integer	No	Return results from a position. The default is 0.
limit	Integer	No	The number of results to return. Results are sorted from earliest date to latest date. The default is 100. The maximum is 100.

Sample request

```
https://my.veevanetwork.com:8443/api/v14.0/event/merge?sinceDate=2017-01-01T00:00:00.000-00:00
```



Sample response

```
{
  "responseStatus": "SUCCESS",
  "totalCount": 2,
  "offset": 0,
  "limit": 100,
  "sinceDate": "2016-12-31T19:00:00.000-05:00",
  "events": [
    {
      "type": "MERGE",
      "date": "2017-12-08T14:19:51.000-05:00",
      "entities": [
        {
          "type": "MERGE_SURVIVOR",
          "entityId": "931521762955172639",
          "entityType": "HCP"
        },
        {
          "type": "MERGE_NONSURVIVOR",
          "entityId": "931521742609390367",
          "entityType": "HCP"
        }
      ]
    },
    {
      "type": "MERGE",
      "date": "2017-12-11T17:09:45.000-05:00",
      "entities": [
        {
          "type": "MERGE_SURVIVOR",
          "entityId": "931539432462359327",
          "entityType": "HCP"
        },
        {
          "type": "MERGE_NONSURVIVOR",
          "entityId": "931539429690448671",
          "entityType": "HCP"
        }
      ]
    }
  ]
}
```

Response

- `responseStatus` - The response status confirming the success of the request.
- `totalCount` - The number of results matching the request.



When the total count exceeds the limit (100), run subsequent requests using the offset parameter to get additional page results.

- `offset` - The offset of this request.
- `limit` - The maximum number of results returned in this request.
- `sinceDate` - The requested start date is ISO 8601 format.
- `events` - A list of events.
 - `type` - The type of event (MERGE).
 - `date` - The date of the event in ISO 8601 format.
 - `entities` - A list of entities involved in the event.
 - `type` - The type of event or action on the entity (MERGE_SURVIVOR or MERGE_NONSURVIVOR)
 - `entityID` - The Network ID (VID) of the entity.
 - `entityType` - the type of entity (HCP or HCO).

Retrieve Unmerge API

The following enhancements are supported with v14.0 only.

Unmerges include events that occurred in your Network instance; only customer (gray) records are reported.

Compatibility

This API uses the GET and POST HTTP methods. It is supported with Network API v14.0.

Syntax

```
https://<DNS>/api/<version>/event/unmerge
```

where

- *DNS* is the URL for your API service
- *version* is the API version

Parameters

Name	Type	Required?	Description
<code>sinceDate</code>	Date	No	Epoch time in milliseconds or a date in ISO 8601 format. If this parameter is not specified, the results are from the last hour.
<code>offset</code>	Integer	No	Return results from a position. The default is 0.
<code>limit</code>	Integer	No	The number of results to return. Results are sorted from earliest date to latest date. The default is 100. The maximum is 100.



Sample request

<https://my.veevanetwork.com:8443/api/v14.0/event/unmerge?sinceDate=2017-01-01T00:00:00.000-00:00>

Sample response

```
{
  "responseStatus":"SUCCESS",
  "totalCount":2,
  "offset":0,
  "limit":100,
  "sinceDate":"2016-12-31T19:00:00.000-05:00",
  "events":[{"
    "type":"UNMERGE",
    "date":"2017-12-04T10:38:31.000-05:00",
    "entities":[{"
      "type":"UNMERGE_ORIGINAL",
      "entityId":"931498177374133023",
      "entityType":"HCP"
    },
    {
      "type":"UNMERGE_NEW",
      "entityId":"931498286389467937",
      "entityType":"HCP"
    }
  ]
},
{
  "type":"UNMERGE",
  "date":"2017-12-11T11:43:40.000-05:00",
  "entities":[{"
    "type":"UNMERGE_ORIGINAL",
    "entityId":"931521762955172639",
    "entityType":"HCP"
  },
  {
    "type":"UNMERGE_NEW",
    "entityId":"931538200903031583",
    "entityType":"HCP"
  }
]
}
]
```



Response

- `responseStatus` - The response status confirming the success of the request.
- `totalCount` - The number of results matching the request.

When the total count exceeds the limit (100), run subsequent requests using the `offset` parameter to get additional page results.

- `offset` - The offset of this request.
- `limit` - The maximum number of results returned in this request.
- `sinceDate` - The requested start date is ISO 8601 format.
- `events` - A list of events.
 - `type` - The type of event (UNMERGE).
 - `date` - The date of the event in ISO 8601 format.
 - `entities` - A list of entities involved in the event.
 - `type` - The type of event or action on the entity (UNMERGE_ORIGIINAL or UNMERGE_NEW)
 - `entityID` - The Network ID (VID) of the entity.
 - `entityType` - the type of entity (HCP or HCO).

RESERVED NETWORK ENTITY ID

Network can now provide a Network entity ID (VID) for a new record as soon as an add request is created using the API. Previously, the Task ID was immediately returned, but a VID was not provided until the request was approved. This enhancement enables customers to use the VID as an identifier in their downstream system.

This feature is not enabled by default and is only supported in Network instances that have the **Create Unverified** option enabled in the Workflow Settings.

To support this feature, the Change Request API is updated to include a new parameter, `reserve_vid`. This parameter is supported in Network API version 14.0 or higher.

Name	Type	Required?	Description
<code>reserve_vid</code>	Boolean (<i>true/false</i>)	No Default is <i>false</i>	Request to reserve a VID immediately when an add request is submitted.



Example

```
{
  "reserve_vid": true,
  "metadata": {},
  "entity_type": "HCP",
  "vid_key": "VCRM:HCP:001A000000pKagw",
  "entity": {}
}
```

When the feature is enabled, the VID is immediately returned to the user when the add request is submitted.

Example response

```
{
  "responseStatus": "SUCCESS",
  "change_request_id": 63259874100112589,
  "reserved_vid": 847328899338601472
}
```

If the user tries to search for an entity using the reserved VID before the record is created, an error message displays:

Reserved VID cannot be found. Please try again later.

The reserved VID is logged in the Task Audit History in the **Message** column.