



# **Veeva** Network

Veeva Network 18R2.0.1 Release Notes

August 2018



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## About these Release Notes

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These Release Notes describe all features that are included in Veeva Network 18R2.0.1.

## Browser requirements

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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.

## Release Note updates

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The following enhancements have been added to the Release Notes since the Early version was published:

- **Conditional matching** - Administrators and data managers can now configure conditional match rules in the basic match UI.
- **Geocoding** – Latitude and longitude values for Canadian (CA) and Australian (AU) addresses are now persisted after the addresses are cleansed in Network.
- **Online Help** - Overview topics and tutorials are now available for key Network features and workflows.

The following enhancements have been removed from the Release Notes since the Early version was published:

- **Third party masters** - Administrators and data managers can now define specific DCR routing criteria for different countries in the same third party master system.
- **DCRs for Parent HCOs** - The Parent Affiliation column in the inbox now indicates if there is an DCR on a Parent HCO.

These enhancements will be available in a future release.

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 18R2.0 major release.

18R2.0 - Features newly released for 18R2.0

18R1.x - Features previously introduced in minor releases

			ST	DS	DM	AD
<b>Widgets</b>						
Search widget	Embed the search widget into your internal application and integrate directly with Network.	18R1.x	●	●	●	●
Profile widget	View real-time data from Network in your internal web-based application without logging directly into the Network instance.	18R1.x	●	●	●	●
<b>Profile</b>						
New Profile	The redesigned Profile page includes usability enhancements. Users who have enabled the new profile for US records can also access the redesigned page for add requests.	18R1.x	●	●	●	●
New Profile	Additional enhancements have been made for Network address inheritance support, enabling the view on EU and Canada profiles, and Send to OpenData support.	18R2.0	●	●	●	●
Address lines construction	US and Canadian addresses can be reconstructed to ensure that they are standardized to support requirements for downstream systems.	18R1.x	●	●	●	●
Formatted address	Formatted addresses are now calculated consistently for all addresses.	18R2.0		●	●	●
<b>Search</b>						
Advanced search	Primary country selections are now saved.	18R2.0	●	●	●	●
<b>Reports</b>						
DCR comments	Network users with access to advanced ad hoc queries can now report on comments in DCRs	18R1.x	●	●	●	●
Masking disabled fields	Data model fields that have been disabled are now masked in ad hoc query results.	18R1.x	●	●	●	●



ST DS DM AD

<b>Data model</b>			ST	DS	DM	AD
Grouped fields	Grouped fields are now available consistently within Network features.	18R1.x	●	●	●	●
Reference data formatting	Reference codes from incoming sources can now be automatically reformatted so they align with the case used by Network codes.	18R1.x	●	●	●	●
Data privacy opt-out	Bulgaria has been added to the list of countries supporting opted-out records.	18R1.x			●	●
Cluster management	This feature now supports IQVIA™ cluster data for Germany.	18R1.x			●	●
Profile layout configuration	Custom profile layouts can now be created and managed in the Network UI.	18R2.0			●	●
Geocoding	Geocodes for Canadian (CA) and Australian (AU) addresses are now persisted after they are cleansed in Network.	18R2.0			●	●
<b>General updates</b>						
Drop down lists	Lists remain open so users can easily make multiple selections.	18R2.0	●	●	●	●
Online Help	Overview topics and tutorials are now available for key Network features and workflows.	18R2.0	●	●	●	●
Daylight Saving Time	Network now properly adjusts for daylight saving time (DST).	18R1.x			●	●
Job schedules	Scheduled job times now accurately reflect the timezone of a user's own browser.	18R2.0			●	●
Removal of weaker TLS ciphers	Support for 1024 bit Diffie-Hellman ciphers and TLS v1.0 is removed. TLS v1.1 and TLS v1.2 are now supported.	18R1.x				●
<b>Data change requests</b>						
Resolution notes	Administrators can now set an option so that it is mandatory that all data change requests (DCRs) have a resolution note.	18R1.x		●	●	●
DCRs - tab and hotkeys	Data stewards and data managers can tab through the fields on a request and use hot keys to jump to action buttons.	18R1.x		●	●	
Reassign task list	The list for reassigning a task to another user is sorted alphabetically. The list can also be searched.	18R1.x		●	●	●



			ST	DS	DM	AD
Suspect match	Tasks now identify aliases and filters that are used during the match process.	18R2.0		●	●	
Attach images to DCRs	Data stewards can now add images to DCR comments to provide evidence for the DCR validation.	18R2.0		●	●	
<b>Inbox</b>						
Assignee list	The Assignee list is now sorted alphabetically.	18R1.x		●	●	●
<b>Match</b>						
Conditional matching	Conditional match rules can now be configured in the basic match UI.	18R2.0			●	●
<b>Data export</b>						
Reference data	A new version of reference data, V7.0, has been introduced to enable exporting target alias names.	18R1.x			●	●
<b>Data maintenance</b>						
Delete locally managed records	HCP and HCO records can be deleted so they are not available in the Network instance.	18R1.x			●	●
Anonymize records	HCP Records can be anonymized so personally identifiable information is removed from the record.	18R1.x			●	●
Anonymize record limit	The number of HCP records that can be included in a job is now 60,000.	18R2.0			●	●
<b>Logs</b>						
Search audit history	Search logs are updated to include more information for administrators	18R2.0				●
<b>Admin Settings</b>						
General settings	The General Settings page has been redesigned.	18R1.x				●
<b>API</b>						
Version	The Network API is updated to v15.0.	18R1.x				Developers
Suspect match tasks	Users can now submit suspect match tasks using the Network API.	18R1.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.

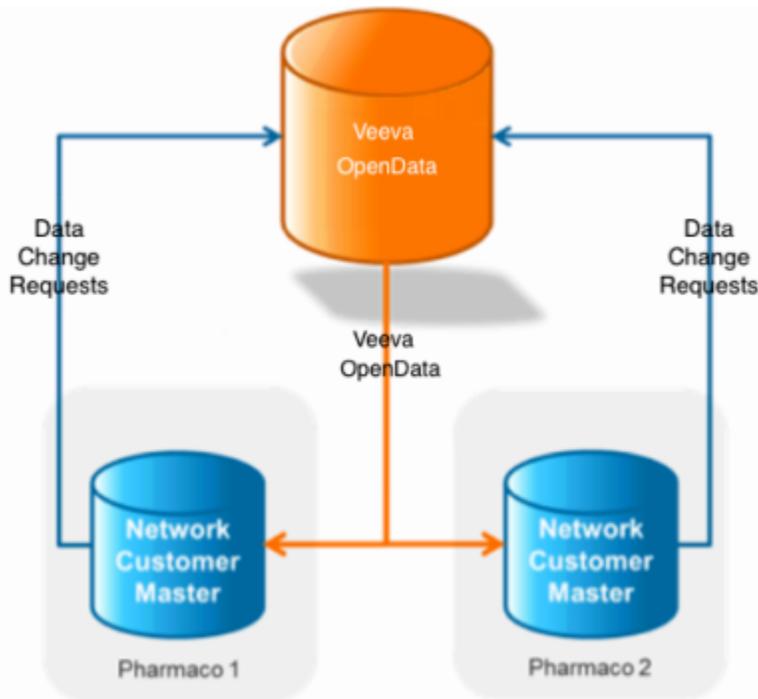


## Introduction

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.



## Widgets

---

Veeva Network is introducing a new integration pattern to enable customers to integrate directly with Network through their external application.

### SEARCH WIDGET

Using the search widget, business users can search for and view real-time master data from your internal application without logging directly into the Network instance. For example, call center representatives can search and download HCPs within Network and Veeva OpenData without leaving the application they are currently in, or sales reps can search for and attach an HCP's record to an expense or event.

Using a custom integration (file-based or using the Network API) takes time to build and maintain. The Network search widget can be quickly embedded in your internal application using the provided code, reducing your integration and maintenance costs.

Network's search widget code provides all of the following development tasks that are required for integration:

- User interface for search queries, search results, and record details.
- Integration with the Network APIs for searching and retrieving master data.
- Ongoing maintenance to support new features and data model changes.

This feature is not enabled by default. For more information, contact Veeva Support.

### *How does it work?*

The Network search widget is supported for internal applications; for example, expense systems, service applications, ERP applications, and event management applications.

Applications must meet the following requirements:

- The application is web-based.
- Your Network instance uses single sign-on (SSO) authentication (every user must have a Network/SSO account).

For more information, see [Configuring single sign-on](#).

Adding Network's search widget in your internal application has three steps:

1. **Configure the widget** - Network administrators set up the widget in their Network instance. When the configuration is saved, code snippets are generated.
2. **Embed the widget** - Web developers embed the generated code snippets into the internal application.

**Note:** When steps 1 and 2 have been completed, the search widget is fully functional for business users to search and download records to their Network instance.



3. **Define an event** - Web developers define an event handler so that when users select a record the developer is returned the event entity data, which contains a JSON of the selected record. The developer can manipulate the JSON in order to add the record into their internal system.

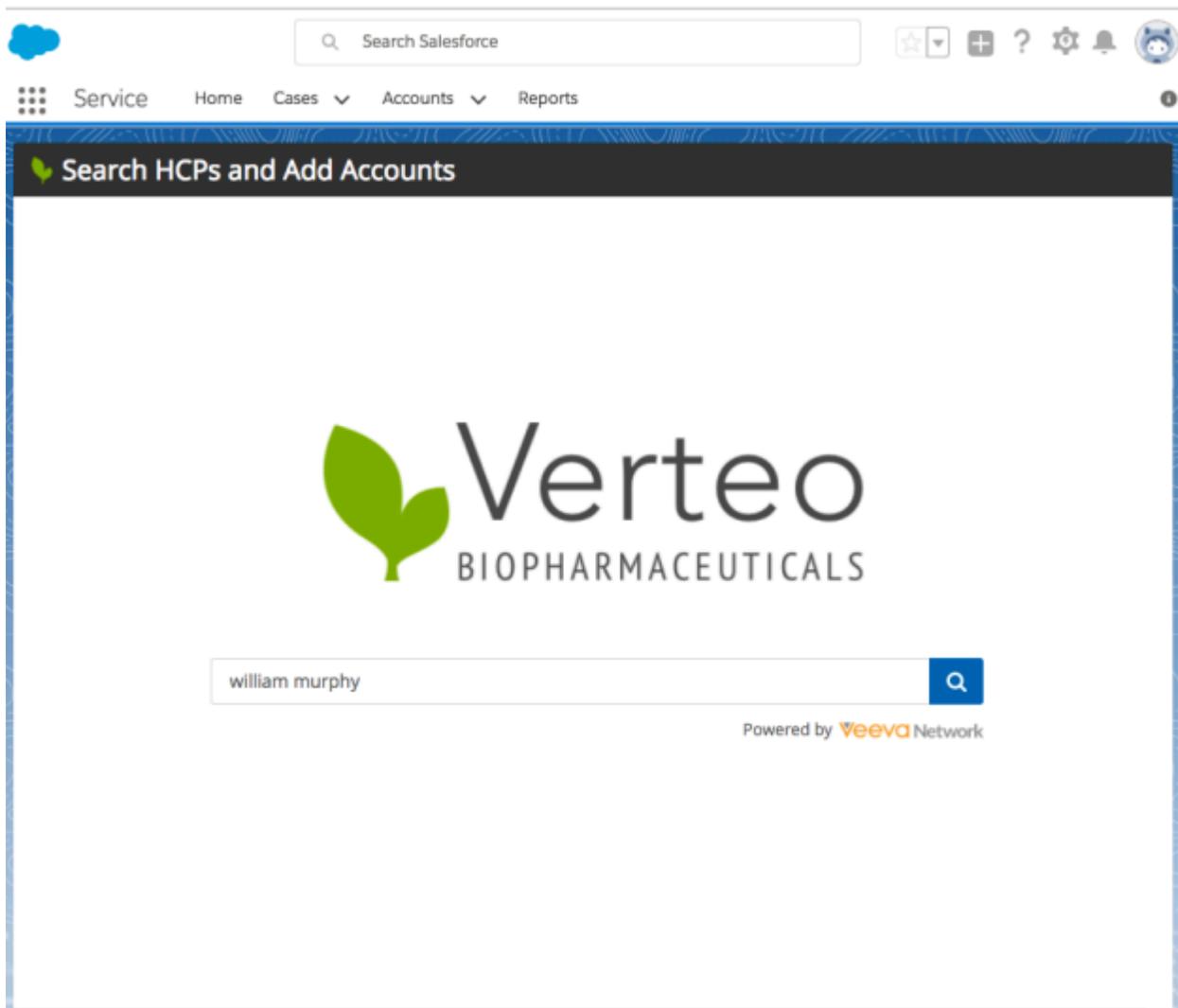
When these steps are complete, the search widget is embedded in your application and users can search for records, view profiles, and add those records to your internal system.

### *Integration example*

In this example, the search widget is embedded in Salesforce's Service Cloud™ application. The user interface and functionality shown in the example are included in the search widget code that is provided by Network.

### **Example**

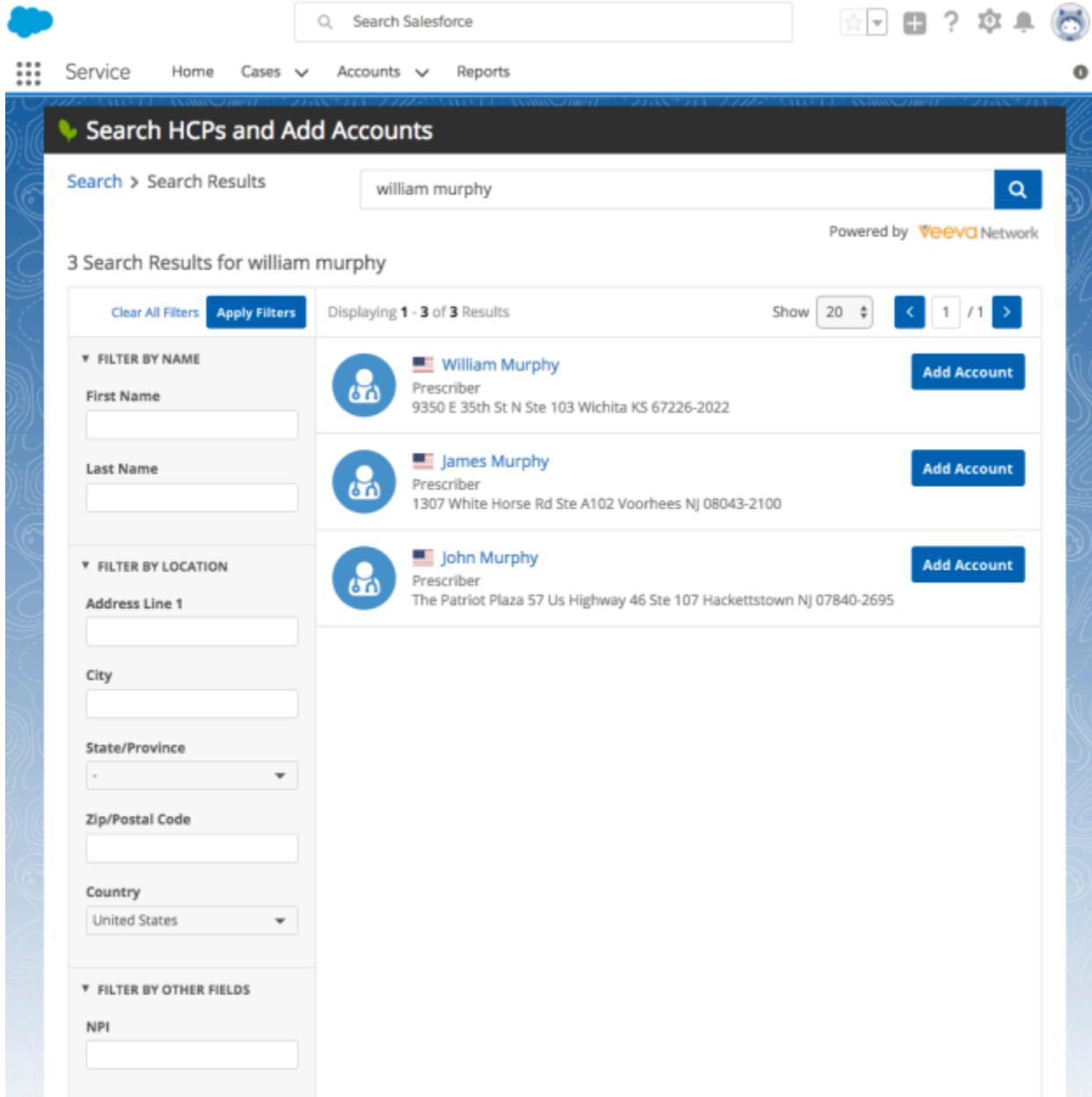
On the main search page, users can type a search term. This page can be customized to include your company's logo and a label for the widget title.





On the search results page, users can view filter the results.

Network administrators define which filters are available for users when the widget is configured in the Network interface. The colors and labels on the page can also be customized.



Users can select the link in the search result to view the record profile.



**Search Results > Profile** **Add Account**

**William Murphy**  
 9350 E 35th St N Ste 103 Wichita KS 67226-2022  
 Prescriber, Thoracic Surgery  
 WRMURPHY@COX.NET +2 more  
 3168585000

**Primary Information**

Name <b>William Murphy</b>	Network Entity ID <b>260904947543966721</b>
HCP Type <b>Prescriber</b>	Degree 1 <b>Doctor of Medicine</b>
Degree 2 No value	Primary Specialty <b>Thoracic Surgery</b>
Other Specialties <input type="button" value="Vascular Surgery"/> <input type="button" value="Surgery/Cardiothoracic"/> <input type="button" value="General Surgery"/>	Status <b>Active</b>
Record State <b>Valid</b>	Gender <b>Male</b>
Place of Employment <b>Locum Tenens</b>	Major Professional Activity <b>Locum Tenens</b>
Type of Practice <b>Direct Patient Care</b>	AMA Do Not Contact? <b>No/False</b>
PDRP Opt Out? <b>No/False</b>	Associated with Kaiser? <b>No/False</b>
PDRP Opt Out Date No value	

**Addresses**

9350 E 35th St N Ste 103 Wichita KS 67226-2022 **verified**  
 Professional

The widget profile page displays the record, which includes the entity-level and child object details. Clicking **Add Account** can download the record to your Network instance from Veeva OpenData. This also provides your application developer with the entity data, in JSON format, for the downloaded record.

This is just one of many integration scenarios available for using the search widget. For more information, contact Veeva Support.



## PROFILE WIDGET

Using the profile widget, business users can view real-time data from your internal web-based application without logging directly into the Network instance. For example, from their internal portal, field users and marketing users can view an HCP profile and confirm information such as address information or parent affiliations for event or marketing material.

Building and maintaining all of the information about HCPs and HCOs using the Network API or target subscription is costly and time-consuming. Maintenance costs can be high, especially when managing the new fields that added to the Network data model with each release and updates to the data.

Network's profile widget code provides all of the following development tasks that are required for integration:

- User interface for viewing profiles.
- Integration with the Network APIs for displaying Network profiles from your application.
- Ongoing maintenance to support new features and data model changes.

This feature is not enabled by default. For more information, contact Veeva Support.

### *How does it work?*

The Network profile widget is supported for internal applications. Administrators configure the widget settings in Network and then web developers add the code to their internal application. Then, from that application, users can open a profile and view Network's latest data for an HCO or HCP. Only profiles that users have access to through their assigned Network data visibility profile will display.

Applications must meet the following requirements:

- The application is web-based.
- Your Network instance uses single sign-on (SSO) authentication (every user must have a Network/SSO account).

For more information, see [Configuring single sign-on](#).

Adding Network's profile widget in your internal application has three steps:

1. **Configure the widget** - Network administrators set up the widget in their Network instance. When the configuration is saved, code snippets are generated.
2. **Embed the widget** - Web developers embed the generated code snippets into the portal.
3. **Additional configuration** - Web developers initialize the widget by opening records using Network entity IDs (VIDs), custom keys, or alternate keys.

When these steps are complete, the profile widget is embedded in your portal. Users accessing profiles directly from their internal application will see the latest data from their Network instance.



### Integration example

In this example, the profile widget is embedded in a customer's internal service portal. The user is a field user who needs to confirm where the HCP works, as well as where they are located. In the service portal, the user can click on the name of the HCP to open the profile.

The screenshot displays a web interface for a service portal. At the top, there is a green header bar with a search box on the left, the user's name 'Fernando Lopez' in the center, and notification, settings, and help icons on the right. A dark sidebar on the left contains navigation options: 'Inbox', 'Reports', 'Cases', and 'Accounts' (which is highlighted in green). The main content area is titled 'Accounts' and features a '+ Add Account' button in the top right. Below the title, there is a 'Sort by' dropdown menu set to 'Recently Contacted' and a 'Displaying 1 - 5 of 15' indicator. The list contains five account entries, each with a name, address, and phone number:

<b>Brian Brett</b> 125 Us Highway 46 Fl 2 Budd Lake NJ 07828-2523	9736919400
<b>John Kolnik</b> 217 White Horse Pike Haddon Heights NJ 08035-1703	8565471661
<b>Christine Milosis</b> 6 Princeton Ct Basking Ridge New Jersey 07920-4247 United States	9087193250
<b>Patricia Perry</b> 101 Carnie Blvd Voorhees NJ 08043-1548	8563253831
<b>Isia Gold</b> 2141 K St Nw Ste 501 Washington DC 20037-1810	2029946827

At the bottom of the list, there is a pagination control showing page numbers 1, 2, and 3, with '1' being the active page.

When the profile displays, it contains all of the information that the user would see if they logged into the Network instance.

The profile layout that displays is determined by the layout that is assigned to the user through their data visibility profile. For example, this user is viewing US records using the USStandard profile layout that is assigned to their data visibility profile.

The user interface and functionality shown in the example are included in the profile widget code that is provided by Network. The colors and labels on the page can be customized.

Summary cards for child objects can be expanded to view more information.



Search... Fernando Lopez

### Network Profile

**Isla Gold**  
2141 K St Nw Ste 501 Washington DC 20037-1810  
Prescriber, Adolescent Medicine (Pediatrics)  
No value  
2029946827

#### Primary Information

Name	Network Entity ID
<b>Isla Gold</b>	<b>260905035825677315</b>
HCP Type	Degree 1
<b>Prescriber</b>	<b>Doctor of Medicine</b>
Degree 2	Primary Specialty
No value	<b>Adolescent Medicine (Pediatrics)</b>
Other Specialties	Status
General Practice	<b>Active</b>
Record State	Gender
<b>Valid</b>	<b>Female</b>
Place of Employment	Major Professional Activity
<b>Other Federal Agency</b>	<b>Full-Time Hospital Staff</b>
Type of Practice	AMA Do Not Contact?
<b>Direct Patient Care</b>	<b>No/False</b>
PDRP Opt Out?	Associated with Kaiser?
<b>No/False</b>	<b>No/False</b>
PDRP Opt Out Date	
No value	

#### Addresses

2141 K St Nw Ste 501 Washington DC 20037-1810 **Verified**  
Professional  
License AK8770871

This is just one of many integration scenarios available for using the profile widget. For more information, contact Veeva Support.



## Profiles

### NEW PROFILE (18R1.1)

The redesigned Profile page has been updated to include several usability enhancements to enable users to quickly find and access record information. Users who have enabled the new profile for US records can also access the redesigned page for add requests.

These enhancements are available by default for records where the primary country is the US.

### Veeva OpenData records

When users access a record owned by Veeva OpenData that hasn't been downloaded to their Network instance, only populated fields display. To download the record, click **Download from OpenData** at the top of the page. The button is also available from the condensed header as users scroll through the record.

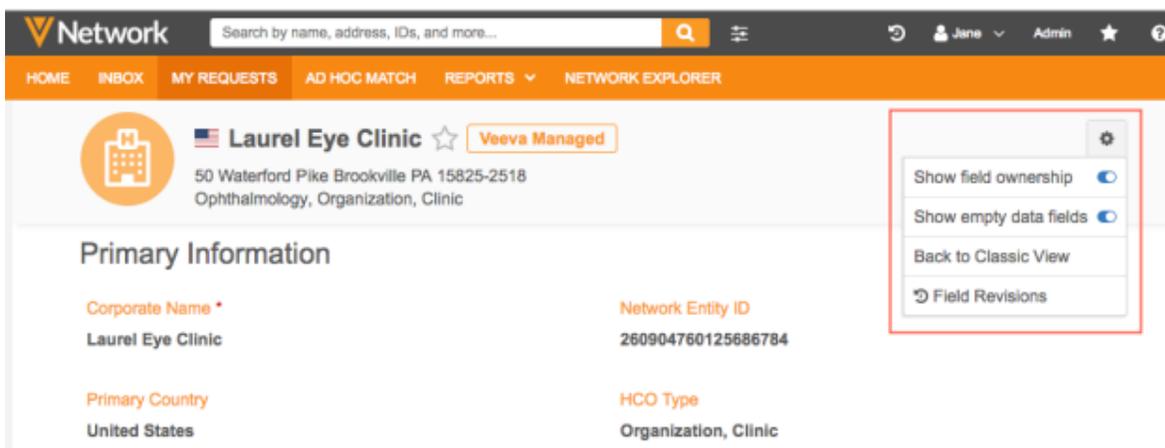
### Hide empty data fields

Users can choose to hide fields on the record that do not contain data; empty fields display by default. To hide these fields, in the **Options**  menu, toggle the **Show empty fields** option. The setting applies only to fields that are in view mode; not fields in edit mode.

When users log out of the Network instance or navigate between different pages in the instance, the setting preference is remembered.

### Record options

As users scroll through the record, the actions available from the summary header move into the **Options**  menu. The options that are available on the record depend on the record ownership and user type. For example, on customer-owned records, local data stewards and data managers can access the **Validate** option from this menu, and on Veeva OpenData records that have not been downloaded into the Network instance, only the **Back to Classic View** option is available because the other options are not applicable.





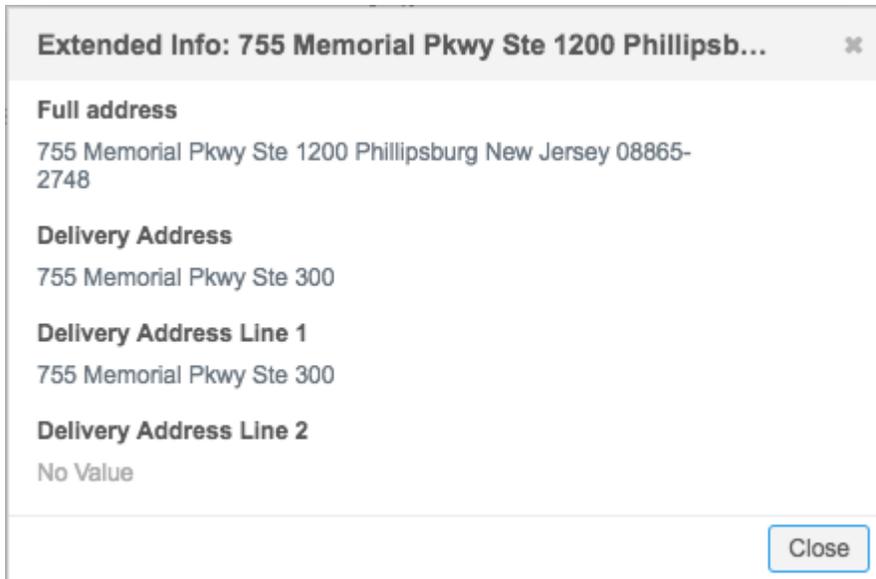
### Field ownership highlighting

Users can differentiate field ownership by the colors of the field names: customer-owned (gray or green), Veeva OpenData owned (orange), and third party owned (blue). For existing users, field ownership highlighting is enabled by default. New users are not familiar with the highlighting ownership pattern, so the highlighting is disabled by default.

To add or remove the field highlighting, in the **Options**  menu, toggle the **Show field ownership** option.

### Extended fields on addresses

On each expanded address card, a new option, **Extended info**, enables users to view all of the cleansed address fields that are included in the profile layout.



**Extended Info: 755 Memorial Pkwy Ste 1200 Phillipsb...** ✕

**Full address**  
755 Memorial Pkwy Ste 1200 Phillipsburg New Jersey 08865-2748

**Delivery Address**  
755 Memorial Pkwy Ste 300

**Delivery Address Line 1**  
755 Memorial Pkwy Ste 300

**Delivery Address Line 2**  
No Value

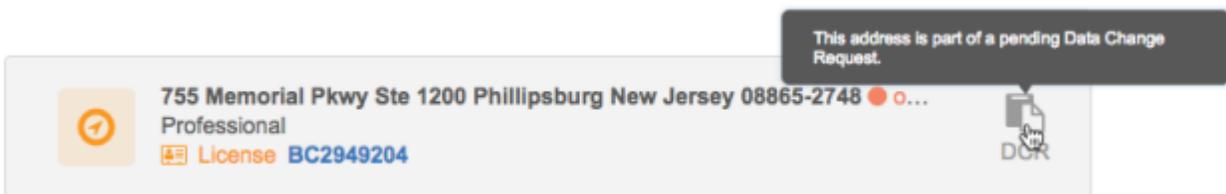
Close

### Tooltips on badges

On child object summary cards, tooltips have been added to some badges to provide more information for users. Hover over the badge to display the tooltip.

### DCR

DCR badges now contain comments to help users understand that there are pending DCRs for that child object on the record.



755 Memorial Pkwy Ste 1200 Phillipsburg New Jersey 08865-2748 o...

Professional  
License BC2949204

This address is part of a pending Data Change Request.

DCR



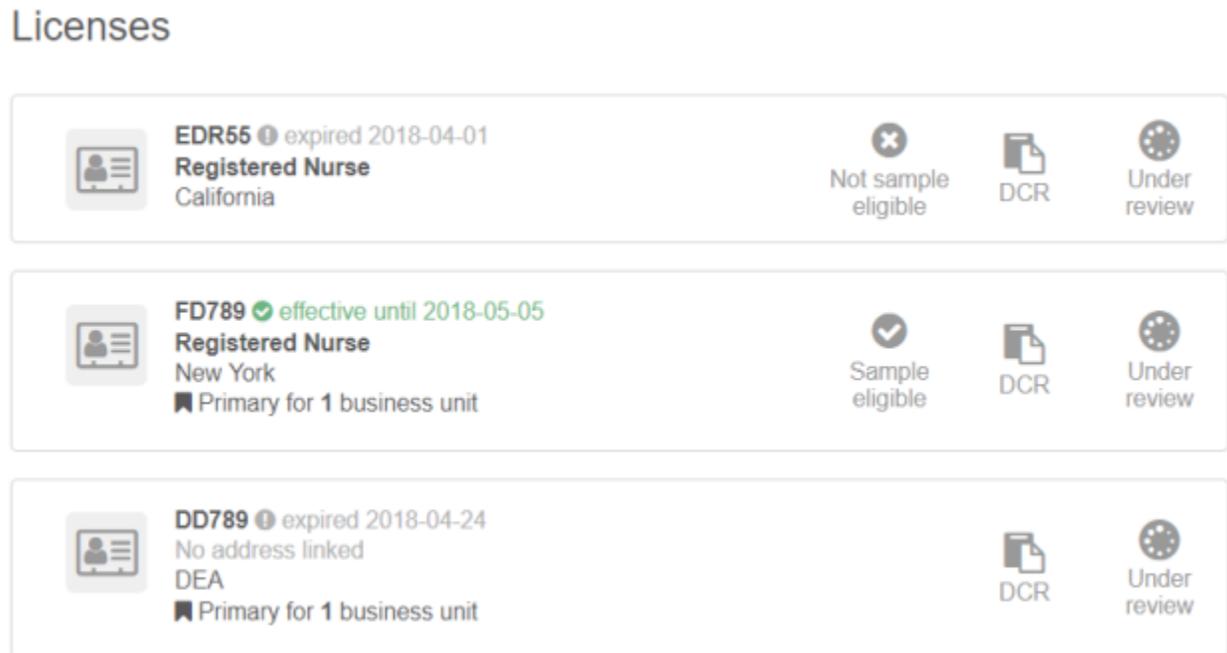
### Sample eligible

On license summary cards, a tooltip displays on sample eligible badges to describe the rules for defining a license as sample eligible.



### Expired licenses

Differentiating between expiring and expired licenses is now easier because the expiring licenses text has been changed to "**effective until <date stamp>**". Previously, the expiring licenses text was "**expires <date stamp>**" which looked very similar to expired licenses.



### Inactive custom keys

Users can now differentiate between active and inactive custom keys because summary cards have a badge that indicates inactive status. This applies to custom keys that are inactive or source deactivated. Also, summary cards are sorted by status so the most relevant custom keys are at the top of the list.



### Custom Keys

VCRM: Account: 001A000000Ax2WoiAJ

SAP: HCP: 264486876054815744 ⊖ Inactive

+ New Custom Key

[Hide inactive custom keys \(1\)](#)

### Suspect match

Data stewards and data managers can more efficiently process suspect matches. Now, when they use the **Find Suspect Match** feature by entering a Network entity ID (VID), the Suspect Match page opens immediately. Previously, when using the Network entity ID (VID), the Find Suspect Matches search results page opened, requiring users to select the entity and click **Create Suspect Match**.

### Data validation

The data validation pane has been updated so it displays more prominently on the redesigned profile. This ensures that users can easily identify errors and correct them before applying their changes. Previously, the data validation pane display was similar to the preview boxes, so it was less noticeable.

Recent » Sara Hendricks Back to Classic View | Field Revisions | ⚙

**Sara Hendricks** ☆ Veeva Managed

755 Memorial Pkwy Ste 1200 Phillipsburg New Jersey 08865-2748

HCP TYPE Prescriber

DEGREE Doctor of Osteopathic Medicine

PRIMARY SPECIALTY Osteopathic Neuromusculoskeletal Medicine

NPI 1356340657

✉ SARAHENDRICKS@WARRENHOSPIT... [+1 more](#)

☎ +1 908-454-6303, [+1 more](#)

VID 260905055455020034

📄 [9 Associated Tasks](#)

**Primary Information**

**Name**  
Sara Hendricks

**Network Entity ID**  
260905055455020034

**Degree 1**  
Doctor of Osteopathic Medicine

**Primary Specialty**  
Osteopathic Neuromusculoskeletal Medicine

**HCP Type**  
Prescriber

**Degree 2**  
No value

**Other Specialties**  
Family Practice (Residents Only)

**VALIDATION**

⚠ Select an HCP type

**SAMPLE ELIGIBILITY**

📄 MS 22646

✍ States eligible to sample:  
MS

**COMPLIANCE DATA**

No compliance data.



### Add requests

The Add New Profile page has been redesigned so that it's consistent with the redesigned profile page. If users have previously enabled the new profile by clicking the red ribbon on the classic profile page, any add request where the primary country is the US will open in a redesigned Add New Profile page. Values can be added for root entity fields and child objects (addresses, licenses, and affiliations). Custom child objects can be added by data stewards and data managers.

The **Back to Classic View** option is available on the page; however, if some field values have been populated on the add request, returning to the classic view will remove those values.

When the changes are applied, users can immediately access the new record profile. The widgets (for example, Sample Eligibility, Compliance Data, Network Explorer, and so on) and field revisions will be available on the record.



## NEW PROFILE (18R2.0)

Additional enhancements have been made to the newly designed profile page, including Network address inheritance features, enabling the view on EU and CA profiles, and Send to OpenData support.

### *New profile available for EU countries and Canada*

The redesigned profile page is available for viewing and editing on all EU country profiles and Canada. Users can access the new profile by clicking the **Try our new view!** red ribbon at the top of the classic profile page. Network retains your choice to view the redesigned profile as you view other records and even when you log out and back into the application. To return to the classic profile, click **Back to Classic View** at the top of the new profile page.

For more information about the features on the new profile, see the "New profile" topic in the *Veeva Network Online Help*.

The new profile is available for Canada and the following EU countries:

- Andorra
- Albania
- Armenia
- Austria
- Azerbaijan
- Belarus
- Belgium
- Bosnia and Herzegovina
- Bulgaria
- Croatia
- Czech Republic
- Cyprus
- Denmark
- Estonia
- Faroe Islands
- Finland
- France
- Georgia
- Germany
- Gibraltar
- Greece
- Hungary
- Iceland
- Ireland
- Isle of Man
- Italy
- Kazakhstan
- Kosovo
- Kyrgyzstan
- Latvia
- Liechtenstein
- Lithuania
- Luxembourg
- Macedonia
- Malta
- Romania
- Russia
- San Marino
- Serbia
- Slovakia
- Slovenia
- Spain
- Sweden
- Switzerland
- Tajikistan
- Turkey
- Turkmenistan
- Ukraine
- United Kingdom
- Uzbekistan
- Vatican

The redesigned Add Request page is also available for EU countries and Canada.

### *Classic view support*

For the supported countries (US, Canada, and EU countries), the new profile is being targeted to replace the classic view in version 18R3.0.



### Network address inheritance

If Network address inheritance is enabled in your Network instance, address summary cards display a badge indicating address inheritance status. This enables users to compare addresses by the Network address inheritance status.

#### Address summary card

On the address summary card, address inheritance badges indicate the following statuses:

- **Synced** - The address is copied from a parent address.
- **Unsynced** - The copied address has been changed and is no longer linked to a parent address.
- **Disqualified** - The previously synced address no longer exists.

Hover over the badge to view information about the HCO that the address was copied from.

**Addresses**

**Address copied from** Synced

**Coventry Family Practice Associates**  
 Empire State Bldg New York New York 10118  
 Network Entity ID: 260904736385926144  
 AMS ID: 2611755  
 HCO Type: Organization, Group Practice

**164 Baron Rd Wind Gap Pennsylvania 18091-9766** verified  
 Professional  
 Inherited from **Coventry Family Practice Associates** Synced Primary

**350 5th Ave Empire State Bldg New York New York 10118** overridden  
 Professional  
 Inherited from **Coventry Family Practice Associates** DCR Unsynced

**185 Roseberry St Phillipsburg New Jersey 08865-1690** verified  
 Professional  
 Inherited from **Jersey Emergency Specialists** Disqualified Inactive

A maximum of four badges can display on an address. If there are 3 or more badges on a summary card, the badges display in a list. Hover over the badge to view a description of the badge.

**164 Baron Rd Wind Gap Pennsylvania 18091-9766** verified  
 Professional  
 Inherited from **Coventry Family Practice Associates** Synced Primary DCR

You can easily navigate between affiliations and related addresses on a record. You can view the HCO that the address was copied from on the Address summary card; for example: Inherited from Coventry Family Practice Associates. To navigate to the HCO from the Address summary card, click the link and the profile page scrolls to that HCO in the **Parent Affiliations** section. For long HCO names, the name wraps so users can differentiate between affiliations that begin with similar names.



220 Las Colinas Blvd E Ste 1100 Irving Texas 75039-5568 verified  
Professional  
Inherited from University of New Jersey / Department of Hepatology and Gastroenterology business unit Synced

2 New Hampshire St Newton New Jersey 07860-2211 verified  
Professional  
Inherited from University of New Jersey / Department of Hepatology and Gastroenterology Medical clinic with focus on hepatology and gastroenterology... Synced

### Parent Affiliation summary card

The Parent Affiliation summary card displays a count of the inherited addresses from the parent entity. If one address has been copied, clicking the count will navigate to the address and expand it. If more than one address has been copied, click the count to see the list of parent affiliation addresses and navigate to the inherited Address cards on the profile.

5 parent affiliation addresses

- 164 Baron Rd Wind Gap Pennsylvania 18091-9766 United States Professional Show Map
- 52 Carnation St Dyer Indiana 46311-1539 Professional
- 350 5th Ave Empire State Bldg New York New York 10118 Professional
- 10010 Don S Powers Dr Munster Indiana 46321-4054 Professional

5 parent affiliation addresses  
Hierarchy Type: Individual to Organization Affiliation

**Note:** Network address inheritance badges and links to HCOs display only when Network address inheritance is enabled and the parent affiliation is local to your customer instance; you have created the relationship between the child entity and the HCO (regardless of whether the child object and HCO are locally managed, Veeva OpenData managed, or third party managed).

### Expanded address card

When you expand the address, any Network address inheritance fields display the address inheritance status (synced or unsynced) when you hover over the card. Fields that are not included in the Network address inheritance configuration do not display a status.

If you edit an address that has been copied from a parent address, the inheritance status changes so you will immediately understand that the address becomes unsynced. The following behavior occurs:

- A warning displays reminding you that you are changing an inherited address.
- Summary card - The **Unsynced** badge displays in the summary.



- Address fields - The **Unsynced**  icon displays the unsync tooltip so you will understand the meaning of the icon.
- You can click the **Re-Sync** link to copy the address again.

### Summary card labels

To ensure that users understand the summary fields displayed on child object summary cards, labels now display; for example, **Licensing Body**.

### Licenses

Fields that have been defined as **Summary** fields in the profile layout are labeled on summary cards in the profile. Fields that display in the summary card by default; for example, `formatted_address__v` and `address_verification_status__v`, do not display labels because the data is easily identifiable. For more information about **Summary** fields, see the "Profile layout configuration" topic in these *Release Notes*.



## Badges

### Primary badge

In Network instances where the custom Network Calculated Primary Address or Affiliations field has not been defined, the Primary badge does not display on summary cards. For more information about Network Calculated primary addresses and affiliations, see the *Veeva Network Online Help*.

### Sample eligibility badge

Summary cards display Sample Eligible badges for state licenses (`type__v` is STATE) when the primary country of the record is the US. The badge display also depends on these required values for the following fields:

- `rxa_eligible__v` is Eligible (E)
- `license_status__v` is Active (A)
- `grace_period__v` is defined and the grace period is in the future

If the fields above are not enabled or do not have the required values on a state license, the Not Sample Eligible badge displays.

The sample eligibility badge does not display for non-state licenses.

### Send add requests to Veeva OpenData

The new profile is updated with the **Send to OpenData** button. Customer data stewards and data managers can send locally managed records to Veeva OpenData as add requests so OpenData takes ownership of the record. This feature reduces stewardship costs for customers and improves data quality.

The active button only displays on records that have a valid record state.



If the button is dimmed, the record contains proprietary data, has pending local tasks, or has already been sent to Veeva OpenData. For each of these reasons, a tooltip message displays when users hover over the dimmed **Send to OpenData** button.



The Send to OpenData feature is not available in Network instances by default. To enable the feature in your Network instance, contact Veeva OpenData. For more information about this feature, see the "Send add requests to Veeva OpenData" topic in the *Veeva Network Online Help*.

### Find suspect match

Records that have been sent to Veeva OpenData as add requests cannot be included in a suspect match task. A message displays in the Find Suspect Match preview box to advise that the record has been sent to Veeva OpenData.

### Candidate record

Candidate records that have been sent to Veeva OpenData as add requests cannot be actioned in the new profile. The **Resolve** button is hidden, so data stewards are unable to promote the record to an active record or delete the candidate record.

### ADDRESS LINES CONSTRUCTION

US addresses can be reconstructed to ensure that they are standardized to support requirements for downstream systems. Most downstream systems map Address Line 1 only and expect it to contain the street name and number. However, address cleansing places the building or organization name in the first few address lines and moves street number, name, and suite number to the last available address line. If this information is removed in downstream systems, samples cannot be delivered. Additional costs and IT overhead might be incurred to resolve the problem. Using this feature to normalize the address lines will support downstream systems and improve data consistency.

This feature is not enabled by default. It applies only to US addresses. To add this feature to your Network instance, contact Veeva Support.

**Note:** This feature is not supported if you have the shipping address feature (truncating and wrapping long US addresses for delivery) enabled in your Network instance. Only one address recalculation feature can be enabled in a single Network instance.



### *Current address mapping example*

Today, in Network, after addresses are cleansed, building or organization are placed in Address Line 1. When the record is exported to downstream systems, Address Line 2 is often stripped from the record, so the street number, name and suite number (if available) is lost. Samples cannot be delivered without this information.

Field	Network (after address cleansing)	Downstream system
Address Line 1	Kaiser Permanente Medical Center	Kaiser Permanente Medical Center
Address Line 2	6600 Bruceville Rd	
Address Line 3		
City	Sacramento	Sacramento
State	CA	CA
Postal Code	95823	95823
Country	US	US

### *Address reconstruction rules*

When the feature is enabled in your Network instance, address lines that meet the rule requirements will be reconstructed when they are added (or updated) and verified using data change requests, the profile page, or source subscriptions.

Network uses a third party cleansing tool to verify addresses. The address reconstruction rules run only after addresses are cleansed.

Reconstruction rules are applied if the following requirements are met:

- Address verification status is V (Verified) or A (Ambiguous) or P (Partially Verified).
- Street number, street name, and/or building are populated

### **Reconstruction rules**

- Address line 1 = Street number (`premise__v`) street name (`thoroughfare__v`) suite number (`sub_building__v`)
- Address line 2 = building (`building__v`) If available.
- Address line 3 = organization (`organization__v`) If building is not available, move to Address Line 2.



### Examples

Review the following examples to see how Network reconstructs the address lines when this feature is enabled.

#### Example 1

Address Line 1 has a building, and Address Line 2 has a street name and number.

Field	Address Lines (after cleansing)	Reconstructed Address Lines
Address Line 1	Stratford Court Apts	58 N Lansdowne Ave
Address Line 2	58 N Lansdowne Ave	Stratford Court Apts

#### Example 2

Address Line 1 has a building, and Address Line 2 has a street name, number, and suite number.

Field	Address Lines (after cleansing)	Reconstructed Address Lines
Address Line 1	Gray Street Medical Bldg	210 E Gray St Ste 1105
Address Line 2	210 E Gray St Ste 1105	Gray Street Medical Bldg

#### Example 3

Address Line 1 has an organization, Address Line 2 has a building, and Address Line 3 street name, number, and suite number.

Field	Address Lines (after cleansing)	Reconstructed Address Lines
Address Line 1	Gulfcoast Veterinary Clinic	15560 McGregor Blvd Ste 3
Address Line 2	15560 McGregor Blvd Ste 3 Bruno Plaza	Bruno Plaza
Address Line 3		Gulfcoast Veterinary Clinic

### Backfilling US addresses in your Network instance

When this feature is enabled in your Network instance, US addresses must be updated to ensure that duplicate entities (HCPs, HCOs) are not created. If locally owned entities are loaded into Network without custom keys, duplicate entities might be created depending on the match rules (for example, if `address_line_1__v` is used in the default match rules).



## Example

Review this example to understand how a duplicate entity might be created.

This is an existing HCP record in a Network customer instance where the address lines construction feature is off.

entity_id	first_name	last_name	address_id	address_line_1	address_line_2	locality	administrative_area	postal_code	country
932349 918506 319903	John	Smith	9323499 1850618 8831	Surrey County Health Center	118 Hamby Rd	Dobson	US-NC	27017- 8471	US

The feature has now been enabled in the Network instance.

A source file is added that updates the existing entity with a middle name, but custom keys for the entity and address are not included in the file.

first_name	middle_name	last_name	address_line_1	address_line_2	locality	administrative_area	postal_code	country
John	Franklin	Smith	Surrey County Health Center	118 Hamby Rd	Dobson	US-NC	27017- 8471	US

Instead of updating the existing entity, a new entity is created. After the address line rules ran and the address in the source file was reconstructed, the match rules could not match the entities using `address_line_1__v`, so a duplicate entity was created.

first_name	middle_name	last_name	address_line_1	address_line_2	locality	administrative_area	postal_code	country
John	Franklin	Smith	118 Hamby Rd	Surrey County Health Center	Dobson	US-NC	27017- 8471	US

## Updating US Veeva OpenData addresses

If you subscribe to US Veeva OpenData, those addresses will be reconstructed in batches in the master instance and will be updated in your Network instance. When your US Veeva OpenData subscription runs, updated addresses, affected entities (HCPs, HCOs) and all associated child objects will be downloaded. Candidate records are excluded from this process.



## Updating local addresses

To update the existing US local addresses in your Network instance, use reporting and subscriptions to find the affected addresses and update them.

### Create a report

Create a report to find the locally owned addresses in your Network instance that have building or organization in Address Line 1 or Address Line 2.

The report must include the following data:

- Entity IDs (VIDs) and Address VIDs - Including the IDs prevents duplicate entities from being created.
- Full address (Address lines 1, 2, and 3; city; state; ZIP; and country) - This ensures that the rules are applied to the existing addresses.

The downloaded results (.csv file) must include the following column headers:

- `entity VID`
- `address VID`
- `address_line_1__v`
- `address_line_2__v`
- `address_line_3__v`
- `locality__v`
- `administrative_area__v`
- `postal_code__v`
- `country__v`

### Example

id	address_id	address_line_1__v	address_line_2__v	address_line_3__v	locality__v	administrative_area__v	postal_code__v	country__v
9879879	98765	Stratford Court Apts	58 N Lansdowne Ave		Lansdowne	US-PA	19050	US
9879879	45673	Gray Street Medical Bldg	210 E Gray St Ste 1105		Louisville	US-KY	40202	US
9879879	12938	Gulfcoast Veterinary Clinic	15560 McGregor Blvd Ste 3 Bruno Plaza		Fort Myers	US-FL	33908	US

To create a report that meets the data and column header requirements:

1. On the Network menu bar, click **Reports > Ad Hoc Queries**.
2. Click the **Advanced** tab.
3. In the text field, paste the following SQL query to retrieve locally owned addresses:



```
SELECT address.vid__v,  
       address.address_line_1__v,  
       address.address_line_2__v,  
       address.address_line_3__v,  
       address.locality__v,  
       address.administrative_area__v,  
       address.postal_code__v,  
       address.country__v,  
       address.organization__v,  
       address.building__v,  
       address.sub_building__v,  
       address.premise__v,  
       address.thoroughfare__v,  
       address.address_verification_status__v,  
       address.is_veeva_master__v,  
       address.entity_type__v,  
       address.entity_vid__v,  
       hcp.is_veeva_master__v  
FROM address  
     INNER JOIN hcp ON address.entity_vid__v = hcp.vid__v  
WHERE address.address_status__v = 'A'  
AND   address.record_state__v = 'VALID'  
AND   hcp.record_state__v = 'VALID'  
AND   hcp.hcp_status__v = 'A'  
AND   address.is_veeva_master__v = 'f'  
AND   (address.address_line_1__v = address.building__v OR  
address.address_line_1__v = address.organization__v)  
UNION  
SELECT address.vid__v,  
       address.address_line_1__v,  
       address.address_line_2__v,  
       address.address_line_3__v,  
       address.locality__v,  
       address.administrative_area__v,  
       address.postal_code__v,  
       address.country__v,  
       address.organization__v,  
       address.building__v,  
       address.sub_building__v,  
       address.premise__v,  
       address.thoroughfare__v,  
       address.address_verification_status__v,  
       address.is_veeva_master__v,  
       address.entity_type__v,  
       address.entity_vid__v,  
       hco.is_veeva_master__v  
FROM address  
     INNER JOIN hco ON address.entity_vid__v = hco.vid__v  
WHERE address.address_status__v = 'A'  
AND   address.record_state__v = 'VALID'  
AND   hco.record_state__v = 'VALID'  
AND   hco.hco_status__v = 'A'  
AND   address.is_veeva_master__v = 'f'  
AND   (address.address_line_1__v = address.building__v OR  
address.address_line_1__v = address.organization__v)
```



4. Click **Run**.
5. In the **Results** section, review the returned addresses.
6. To save the report on your local computer, click **Download**. (The .csv file that is created will be referred to here as "File A").

### Import the addresses into Network

Update the addresses (in File A) and import them into Network to trigger the address lines construction rules.

1. For addresses where both building and organization are populated, update the address fields to the following format in the .csv file:
  - `address_line_1__v = building`
  - `address_line_2__v = street number <space> street name <space> suite number <space> organization`

If the third party address cleansing process is able to validate the address it will parse the data into the correct fields. After the address is cleansed, the address lines construction rules can be applied.

**Note:** The addresses cannot be parsed into the correct fields when building, organization, premise, thoroughfare, and sub building are placed in separate address lines. For example, address line 1 = building, address line 2 = organization, and address line 3 = premise, thoroughfare, and sub building.

2. In the admin console, click **System Interfaces > Systems** and add a new system called **Address Lines Construction**.

The use of a specially named system can be used to filter the records that are being updated and can be used for extracting the affected addresses later on.

3. Configure a source subscription to use the exported address file (File A) as the source file. An existing subscription can be used, but ensure that the **System** is the **Address Lines Construction** system that you just created.
4. Run the source subscription to trigger the address lines construction rules.

The addresses will be updated so that address lines are reconstructed.



## Compare addresses

*These steps are optional.* Create a new file so that you can compare the source addresses with the newly reconstructed addresses.

1. Use reporting or a target subscription to export the addresses that were processed by the address lines construction rules. Add the filter, System = Address Lines Construction. (This will be referred to as "File B").
2. In the .csv file, update the address lines column names with the following changes:
  - address\_line\_1\_\_v to reconstructed\_address\_line\_1\_\_v
  - address\_line\_2\_\_v to reconstructed\_address\_line\_2\_\_v
  - address\_line\_3\_\_v to reconstructed\_address\_line\_3\_\_v
3. Import File A and File B into a database.
4. Create another file, File C, by cross-referencing the entity and address VIDs in the two files (Files A and B).

The column headers in File C should be:

- entity VID
- address VID
- address\_line\_1\_\_v
- address\_line\_2\_\_v
- address\_line\_3\_\_v
- reconstructed\_address\_line\_1\_\_v
- reconstructed\_address\_line\_2\_\_v
- reconstructed\_address\_line\_3\_\_v

5. Compare the source address line fields with the Network reconstructed address line fields.

If the reconstructed address lines are in an unexpected format, use the address VIDs to find the addresses in the Network UI and manually override them.

## ADDRESS LINES CONSTRUCTION

US addresses can be reconstructed to ensure that they support downstream systems by containing the street name and number. Now, addresses for Canada are also supported for this feature.

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



## FORMATTED ADDRESSES

Formatted addresses are now calculated consistently for all addresses. When an address is added or updated through a DCR, using the profile page, or through a source subscription, the formatted address is calculated using address lines 1 and 2 (if available).

This enhancement is enabled by default and applies to all countries except for Japan.



### Format

To ensure that all formatted addresses are consistent, when the address verification status is V (*Verified*) or A (*Ambiguous*) or P (*Partially Verified*), both address line 1 and 2 are used to create the formatted address. This format applies whether the address lines construction feature is enabled or not.

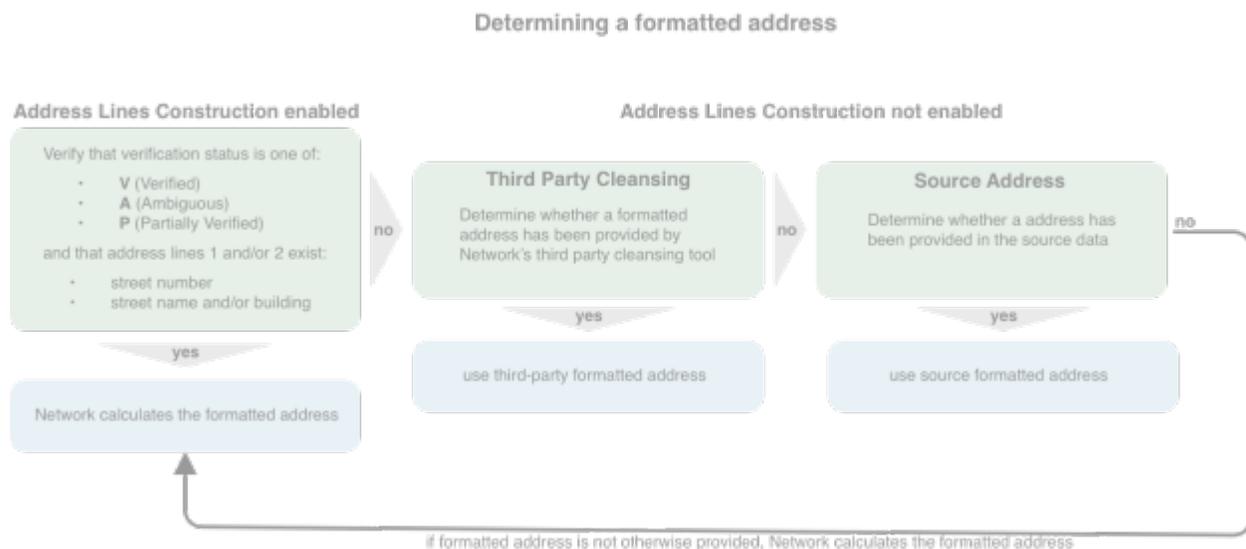
### Calculating formatted addresses

Formatted addresses are calculated by Network when the following conditions are met:

- The address lines construction feature is enabled
- The address verification status is *Verified*, *Partially Verified*, or *Ambiguous*.
- Street number, name, and/or building are populated.

The address could be calculated within Network using the third party address cleansing service, the source file that provided the address, or Network itself.

Review the following diagram to understand how the formatted address is calculated.





When the address lines construction feature is enabled, Network's third party address cleansing service provides formatted address based on the cleansed address lines where:

- Address line 1 = building and/or organization
- Address line 2 = premise, thoroughfare, subbuilding

**Example formatted address:** Empire State Bldg 350 5th Ave

Network then calculates formatted addresses after the address lines construction feature is applied.

- Address line 1 = premise, thoroughfare, subbuilding
- Address line 2 = building

**Example formatted address:** 350 5th Ave Empire State Bldg

The screenshot displays a Veeva address verification interface. At the top, it shows the address "350 5th Ave Empire State Bldg New York New York 10118" with a green checkmark and the word "verified". Below this, the address is categorized as "Professional". The interface is divided into two columns of information:

<b>Address Type</b> Professional	<b>Record State</b> Valid
<b>Address Line 1 *</b> 350 5th Ave	<b>Address Line 2</b> Empire State Bldg

### Example

Review the examples to understand how the formatted address is calculated by Network after a source file is added and the address lines construction feature runs.

The following conditions are true:

- Third party cleansing tool is enabled in your Network instance
- Address verification status is V (*Verified*) or A (*Ambiguous*) or P (*Partially Verified*) and premise, thoroughfare and/or building are populated
- Address lines construction feature is enabled



Existing in Network			Added by Source File			Calculated by Network		
Address L1	Address L2	Formatted Address	Address L1	Address L2	Formatted Address	Address L1	Address L2	Formatted Address
350 5th Ave	Empire State Bldg	Empire State Bldg 350 5th Ave	Empire State Bldg	350 5th Ave	(no field provided)	350 5th Ave	Empire State Bldg	350 5th Ave Empire State Bldg
350 5th Ave	Empire State Bldg	Empire State Bldg 350 5th Ave	Empire State Bldg	350 5th Ave		350 5th Ave	Empire State Bldg	350 5th Ave Empire State Bldg
350 5th Ave	Empire State Bldg	Empire State Bldg 350 5th Ave	Empire State Bldg	350 5th Ave	Empire State Bldg 350 5th Ave	350 5th Ave	Empire State Bldg	350 5th Ave Empire State Bldg
350 5th Ave	Empire State Bldg	Empire State Bldg 350 5th Ave	Empire State Bldg	350 5th Ave	350 5th Ave Empire State Bldg	350 5th Ave	Empire State Bldg	350 5th Ave Empire State Bldg

## Search

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### ADVANCED SEARCH

#### Primary country

When users select a primary country the selection will now be saved. This enables users who are always working in a specific country, or are working on a country-specific project, to avoid having to select the country repeatedly each time they access advanced search. The primary country is saved when users navigate to other pages and when they log out and return to their Network application.

## Reports

---

### REPORTING ON DCR COMMENTS

Network users with access to advanced ad hoc queries can now report on comments in DCRs. This is particularly helpful for teams so that they can verify data quality by validating the correctness of the data based on the comments that have been added to the DCR. A new table, `change_request_comment`, has been added to the reporting schema to support this enhancement.

This enhancement is available by default.



DCR comments will be tracked for reports from version 18R1.1 and onwards. DCRs with created dates before version 18R1.1 but that are processed after version 18R1.1 will be tracked. Any DCRs with comments that were processed prior to version 18R1.1 are not available in reports. Data validation errors are logged as comments by Network, so these will also display in the report.

To report on DCR comments, use the `change_request_comment` table in your advanced SQL query.

### Example

```
select * from change_request_comment order by created_date asc
```

This query result returns four columns: the DCR ID, comment, date, and DCR creator.

## Ad Hoc Queries

Database Last Updated: May 7, 2018, 11:57am    Next Update: May 7, 2018, 3:57pm    Save Run

Record Details    Counts & Summaries    **Advanced**

```
1 select * from change_request_comment order by created_date asc
```

Insert: Q | [ ] | [ ] | [ ] | [ ]    Format: [ ]    Record State: [ ]

Queries selecting all columns take much longer to process.

**Results** (448 records)   

CHANGE REQUEST ID	COMMENT	CREATED DATE	CREATED BY
929840784525885471	Updated email address and phone number.	8-05-04 17:14:01	susan.stevens@verteo.com
930111929406521375	New address. Verified for HCP.	8-05-04 15:29:43	dan.woods@verteo.com
930111932544385055	Rejected address added by requested. Not verified by HCP.	8-05-03 15:30:31	susan.stevens@verteo.com
930113863957938207	Added gender and specialty - validated on clinic website.	8-05-03 13:41:42	maria.lopez@verteo.com
930134495682363423	Rejected request to add address. Could not be verified.	8-05-07 11:08:37	maria.lopez@verteo.com

DCRS that were opened before version 18R1.1 but were not processed will be captured in the results because their completed date is post 18R1.1.



## MASKING DISABLED FIELDS

Data model fields that have been disabled in an instance are now masked in advanced ad hoc query results. Previously, disabled fields were unavailable to report on from the Network UI, but if users typed an advanced SQL query, data could still be retrieved for those fields. Now, the data will be masked so users cannot view data that they aren't supposed to. The fields will not be removed completely so that existing behavior and functionality is not affected; for example, if you have saved reports that query the newly disabled field, the reports will still validate and do not need to be updated to remove that field.

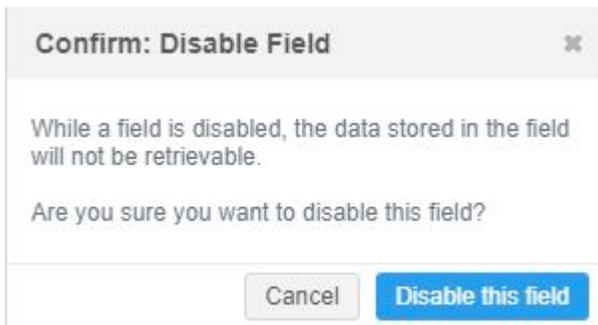
This applies only to fields that were enabled and populated with data and then were later disabled. Any existing or newly disabled fields will behave the same way. Fields that have never been enabled are not affected.

This enhancement is enabled by default.

### *Disabled fields*

Administrators and data managers can disable fields in the Network Data Model.

Before a field, or a set of fields (for example, `HCO_focus_area__v` fields), is disabled, users are reminded that the field data will become unavailable. A pop-up message displays to confirm that the field should be disabled.



### *Queries containing disabled fields*

If users write an advanced SQL query containing a disabled field, NULL is the only value returned for the field; every value is replaced with NULL when the query is executing. For example, if the query contains the disabled field in the WHERE clause, ON clause, or when the query performs a calculation, NULL will be the only value returned.

#### **Example**

In this example, the field `major_class_of_trade__v` is a disabled field.

```
SELECT vid__v, hco_type__v, major_class_of_trade__v
FROM hco
WHERE major_class_of_trade__v IS NULL ;
```



This query will return all HCO records because every value for `major_class_of_trade__v` is considered NULL to the query.

Users cannot query on actual values for disabled fields because the query builder replaces the values with NULL.

For example, if the query contained an actual value for `major_class_of_trade__v`, no results would be returned.

```
SELECT vid__v, hco_type__v, major_class_of_trade__v
FROM hco
WHERE major_class_of_trade__v = '11'
```

The query will find no HCOs where the major class of trade is *Pharmacy* (Network code, 11) because the data is masked for that disabled field.

### Masking data

When the field is disabled in the Network Data model, the data is immediately masked in reports; it is not dependent on the reporting database updates.

In the report results in the Network UI, field names for disabled fields display but the data is masked with **Field Disabled**.

Results (10 records)				
NETWORK ENTITY ID	FIRST NAME	LAST NAME	BIRTH CITY	CREATED DATE
242979800367498243	Karen	Mattie	Field Disabled	2016-08-16 16:59:19
242979800367498245	Audrey	Serafin	Field Disabled	2016-08-16 16:59:37
242979800367498246	Beverly	Silbaugh	Field Disabled	2016-08-16 17:00:07
242979800367498247	Suzanne	Mchugh	Field Disabled	2016-08-16 16:59:59
242979800384275456	Susan	Gretz	Field Disabled	2016-08-16 16:59:04

If users download the report, two options are available: **Description** and **Code**.

**Download Settings** ✕

Reference  Description  Code

Language English ▼

Cancel
OK

The behavior of field data in the report depends on the option that you select.



**Code** - The downloaded report contains the field name but the column is NULL; no data displays. If you are using the report for downstream systems, use this option so that the field data is blank and doesn't affect your integration.

hcp.vid__v (NETWORK ENTITY ID)	hcp.first_name__v (FIRST NAME)	hcp.last_name__v (LAST NAME)	hcp.birth_city__v (BIRTH CITY)	hcp.created_date__v (CREATED DATE)
242979800367498243	Karen	Mattie		2016-08-16T20:59:19+00:00
242979800367498245	Audrey	Serafin		2016-08-16T20:59:37+00:00
242979800367498246	Beverly	Silbaugh		2016-08-16T21:00:07+00:00
242979800367498247	Suzanne	Mchugh		2016-08-16T20:59:59+00:00
242979800384275456	Susan	Gretz		2016-08-16T20:59:04+00:00

**Description** - The downloaded report will contain the field names with the data masked as **Field Disabled**. This is a string masking that can be used on fields that are not string fields (for example, integer fields). This option provides feedback for users who would not know that the field is disabled.

hcp.vid__v (NETWORK ENTITY ID)	hcp.first_name__v (FIRST NAME)	hcp.last_name__v (LAST NAME)	hcp.birth_city__v (BIRTH CITY)	hcp.created_date__v (CREATED DATE)
242979800367498243	Karen	Mattie	Field Disabled	2016-08-16T20:59:19+00:00
242979800367498245	Audrey	Serafin	Field Disabled	2016-08-16T20:59:37+00:00
242979800367498246	Beverly	Silbaugh	Field Disabled	2016-08-16T21:00:07+00:00
242979800367498247	Suzanne	Mchugh	Field Disabled	2016-08-16T20:59:59+00:00
242979800384275456	Susan	Gretz	Field Disabled	2016-08-16T20:59:04+00:00

### Saved and scheduled reports

When saved reports are run and downloaded, any masked fields will contain NULL values. Likewise, after a field is disabled, the next time a scheduled report runs, the field will contain NULL values. Reports that are sent to an FTP location will also contain NULL values for disabled fields.

### Re-enabling fields

If the data model field is enabled again after being disabled, the field values are available again in reports. Any changes to the data while the field was disabled is tracked and available for users.

## Data model

---

### GROUPED FIELDS

Grouped fields are now available consistently within Network features. Some Network data model fields are grouped within a set; for example, Specialty, Phones, Focus Areas, and so on. In Network features where you can filter or search for data within fields, it's useful to work with the fields as a group instead of having to choose individual fields. For example, if users are searching for HCPs that specialize in stroke medicine, they can select the **All Focus Areas** group of fields so Network searches the 36 fields in that set: (hcp\_focus\_area\_1\_\_v to hcp\_focus\_area\_36\_\_v).

Previously, not all features used the same list of grouped fields, or the name of the grouped field was different in some features.

This enhancement is enabled by default in all Network instances. It applies to all standard (\_\_v) fields that are part of a set in the Network data model.



**Advanced Search** ⓘ

Contains Keywords  Primary Country

---

**Name**

First Name  Last Name

Corporate Name

---

**Location**

Address Line 1

Address Country  State/Province

City  Zip/Postal

---

**More fields**

FIELD NAME	VALUE
Entity Type <input type="text"/>	HCP <input type="text"/>
<b>HCP All Focus Areas <input type="text"/></b>	Stroke Medicine <input type="text"/>

[+ Add Search Fields](#)

[Clear fields](#) [Search](#)

### Groups of fields

The following field groups are available:

Group Name	Data Model Fields Included	Attribute Group Name (used in Advanced queries)
All Accreditations	hco_accreditation_area_1__v through hco_accreditation_10__v	hco_accreditations
All Address Lines (reporting only)	address_line_1__v through address_line_3__v	address_lines
All Alternate Names	alternate_name_1__v through alternate_name_10__v	alternate_names
All Credentials	credentials_1__v through credentials_10__v	credentials
All Delivery Address Lines (reporting only)	delivery_address_line_1__v through delivery_address_line_3__v	delivery_addresses
All Emails	email_1__v through email_10__v	emails
All Faxes	fax_1__v through fax_10__v	faxes
All HCO Focus Areas	hco_focus_area_1__v through hco_focus_area_10__v	hco_focus_areas
All HCP Focus Areas	hcp_focus_area_1__v through hcp_focus_area_36__v	hcp_focus_areas
All Medical	medical_degree_1__v through	medical_degrees



Group Name	Data Model Fields Included	Attribute Group Name (used in Advanced queries)
Degrees	medical_degree_5__v	
All National IDs	national_id__v through national_id_5__v	national_ids
All Phones	phone_1__v through phone_10__v	phones
All Specialties	specialty_1__v through specialty_10__v	specialties
All URLs	URL_1__v through URL_2__v	URLs

**Note:** Field sets for EMR fields, CMS fields, and Sanction fields are not included in this enhancement.

### *Features that use grouped fields*

Grouped field sets are available in the following features:

- **Data validation rules** - all grouped field sets
- **Advanced search** - all grouped field sets
- **Ad hoc queries** (includes data maintenance jobs and reporting) - all grouped field sets (including All Address Lines and All Delivery Address Lines)
- **Veeva OpenData Subscriptions** - All Specialties only.
- **Target subscriptions** - all grouped field sets
- **Search API** - all grouped field sets

### *API updates*

To support this enhancement, the `fieldSet` attribute has been added to the Retrieve Fields Metadata and Retrieve Field Details Metadata API. It is available in version 15.0 and later of the Network API. Earlier versions of the API are not affected.

### *Data model behavior for grouped fields*

Some fields can be enabled and disabled in the Network data model. Typically, groups of fields are enabled or disabled as a set; if you enable one field, all of the fields in that set are also enabled. Fields that were created in Network version 1.0 cannot be disabled, but other fields that have been added to the data model for that group will behave as a set. Review the table below to understand the behavior for each set of grouped fields.

**Note:** Fields that were created in Network version 1.0 cannot be disabled.



Field Group	Fields That Cannot Be Disabled	Fields That Can Be Enabled / Disabled
All Accreditations		All fields can be enabled or disabled (as a set).
All Alternate Names	alternate_name_1__v	alternate_name_2__v through alternate_name_10__v (as a set)
All Credentials	All fields in this group.	
All Emails	All fields in this group.	
All Faxes	All fields in this group.	
All HCO Focus Areas		All fields can be enabled or disabled (as a set).
All HCP Focus Areas		All fields can be enabled or disabled (as a set).
All Medical Degrees	medical_degree_1__v medical_degree_2__v	medical_degree_3__v through medical_degree_5__v (as a set)
All National IDs	national_id__v	national_id_2__v through national_id_5__v (as a set)
All Phones	All fields in this group.	
All Specialties	All fields in this group.	
All URLs	All fields in this group.	

## REFERENCE DATA FORMATTING

Network can now reformat reference codes from incoming sources so that all values display in the same case (upper, lower, or mixed case) that is used by reference codes in Network. Previously, reference values from incoming sources displayed just as they were defined in the source, so the cases were inconsistent and looked incorrect. For example, Network's reference code **US-NY** is used in the `administrative_area__v` field for addresses. The code is used to represent the US state of New York. An incoming source could have records that use the codes **US-ny**, or **us-ny**. All of these variations are considered the same by Network because reference codes are case insensitive, but visually they look incorrect. Using this reformatting option, incoming source values are identically aligned to the case used by the reference code in Network, which could be upper, lower, or mixed case.

All new instances will have this option enabled by default. For existing customers, contact Veeva Support to add this enhancement to your Network instance. When the feature is enabled, incoming data will align to the reference codes format used by Network.



## DATA PRIVACY OPT-OUT

Bulgaria has been added to the list of opted-out countries in the Veeva OpenData EUMaster. Records that are opted-out by Veeva OpenData do not display and cannot be accessed in downstream systems. This ensures data privacy for opted-out HCPs to satisfy regional regulatory requirements.

To review the list of opted-out countries in the `data_privacy_opt_out__v` field, in the Admin console, click **Data Model > Network Data Model** and select the field.

## CLUSTER MANAGEMENT

Customers can now enrich addresses in Germany by adding cluster codes. In this release, Network has included support for the following third party cluster provider / country combination:

- Germany - IQVIA™

A TPA must be signed with the third party cluster provider to use the cluster management feature. For more information about this feature, see [Managing clusters](#).

## PROFILE LAYOUTS CONFIGURATION

Administrators and data managers can now create and manage profile layouts in the Network user interface. Previously, profile layout configurations were completed using JSON files and APIs, which was time-consuming and error prone. The feature includes a preview so administrators can visualize their changes while they are updating a layout.

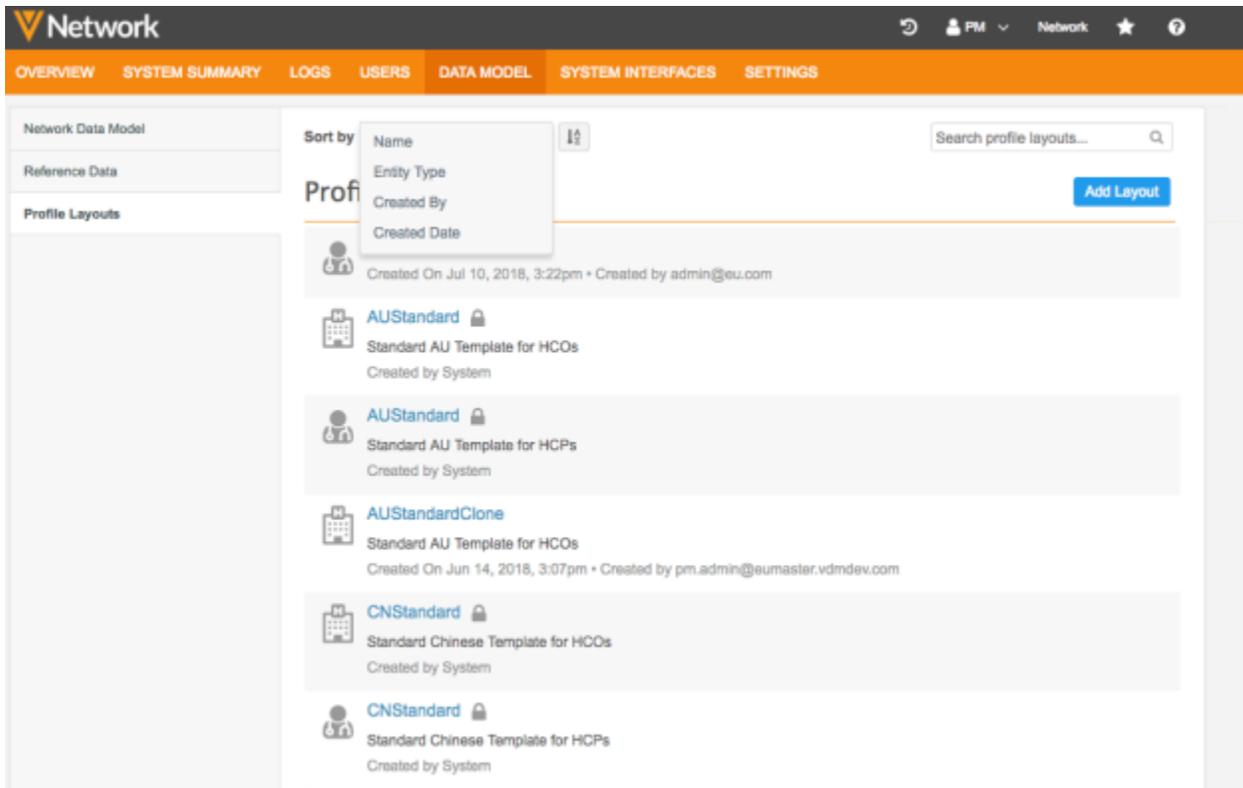
This feature is available by default. Administrators must enable the feature for their Network instance by selecting the **Profile Layout Configuration** option in the **General Settings**.

### *Managing profile layouts*

Administrators and data managers can add and manage custom profile layouts.

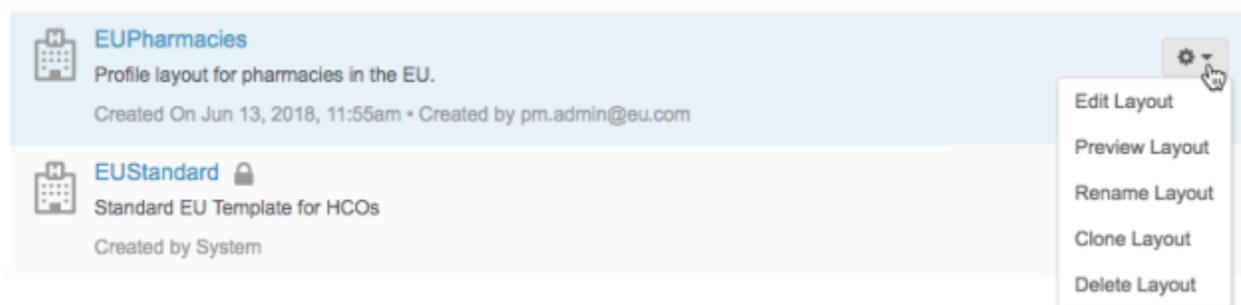
- In the Admin console, click **Data Model > Profile Layouts**.

The profile layout list displays all of the standard (Veeva-owned) and custom profile layouts that exist in your Network instance. By default, the profile layouts are sorted by name. Expand the **Sort by** list to reorder the layouts by **Entity Type** or **Created By** or **Created Date**. Click **Sort**  to reorder the list alphabetically in ascending or descending order. Use the Search field to find a specific profile layout from the list.



Hover over a profile layout to display the **Action**  list. The actions available for a profile layout depend on which type it is.

- **Standard profile layouts** - Default layouts that are provided in all Network instances. They cannot be edited. A lock  icon displays beside standard layouts.
- **Custom profile layouts** - Layouts that have been created in your Network instance for your own use.





Available actions for profile layouts:

Action	Description	Standard Layout	Custom Layout
Edit Layout	Edit the layout to manage the sections and fields and how they display in the profile layout.		
View Layout	View the layout in Read-Only mode. Within the layout view, users can preview the layout by searching for an existing entity.		
Preview Layout	Search for an entity and view the existing profile layout. The layout can be previewed in either the classic profile or new (redesigned) profile.		
Rename Layout	Update the name of an existing profile layout.		
Clone Layout	Create a new profile layout by making a copy of an existing layout. The cloned layout must retain the entity type and child entities from the original layout. The layout name and description can be changed, as well as any field and section updates on the actual layout.		
Delete Layout	Remove the profile layout from your Network instance. If a layout is being used by a data visibility profile, you must replace it with a different layout. <b>Note:</b> Only administrators can delete layouts.		

### *Adding a profile layout*

Custom profile layouts can be added in your Network instance. Network provides a set of standard profile layouts, but you might want to create your own layouts for specific use cases.

To add a new profile layout:

1. On the Profile Layouts page, click **Add Layout**.
2. In the **Add Layout** dialog, define the following information:
  - **Entity Type** - Choose **HCP**, **HCO**, or **Contract** (if enabled).  
Contract is for contract organizations. Profiles for contract organizations can be restricted by user permissions. For more information, see the *Veeva Network Online Help*.
  - **Layout Name** - Type the name for this profile layout.
  - **Description** - Type a meaningful description for this profile layout.
  - **Child Objects** - Select all of the child objects that should be included on the profile layout. The list is filtered by the entity type that is selected.

When the profile is created, all of the fields for the selected child objects will be added to the section. This way, instead of adding all of the required fields, it is easier for you to remove any fields that you do not need.



**Add Layout** [Close]

Entity Type\* HCP

Layout Name\* [Text Field]

Description\* [Text Field]

Child Objects\* Select child objects...

Search [Text Field]

Select All 0 / 4

- Addresses
- Parent HCOs
- Licenses
- Custom Child Objects

Add

3. Click **Add**.

The new profile layout displays. The left pane displays default sections for the selected child objects. The right pane contains a preview section so you can view your changes to the layout before saving them.

Sections are created for all of the selected child objects. Each child object section contains all of the fields assigned to the child object in the Network data model; standard Veeva fields and custom fields.

Profile Layouts > EUPharmacies

### EUPharmacies

Profile layout for pharmacies in the EU.  
Created On Jun 13, 2018, 11:55am • Created by admin@eu.com

Cancel Clone Delete Save

Search for profile layout field... [Search Icon]

- > Addresses
- > Parent HCO Affiliations
- > Licenses
- > License
  - ▼ Licensing Authority
  - ▼ License
  - ▼ License Degree
  - ▼ Best State License?
  - ▼ License Eligibility
  - ▼ Sample Eligibility
  - ▼ License Type
  - ▼ License SubType
  - ▼ Licensing Body
  - ▼ Drug Schedule Details
  - ▼ DEA Activity Code
  - ▼ DEA Payment Indicator
  - ▼ Address
  - ▼ Address from License Source

Profile Layout Preview

Search to preview an entity... [Search Icon]

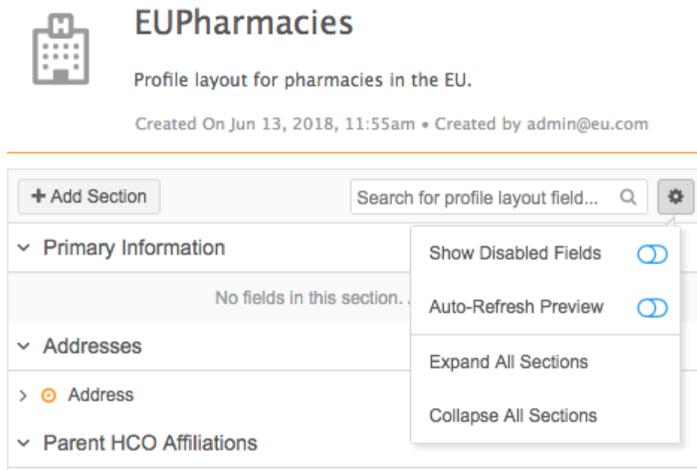


Now that the profile layout is created, you can edit the layout.

### *Editing profile layouts*

Customize profile layouts by adding and editing sections and fields. Only custom profile layouts can be edited. Standard profile layouts are read-only.

At the top of the profile layout, click the **Options**  menu to enable general settings for the profile layout configuration.



The following settings are available:

- **Show Disabled Fields** - View disabled fields in your profile layout. This option is not enabled by default.  
If this option is not enabled, disabled fields are not returned if you use the search field to find fields in your layout.
- **Auto-Refresh Preview** - Enable so the preview pane automatically refreshes the record you are viewing whenever you make changes to the profile layout. This option is not enabled by default.
- **Expand All Sections** - Expand all of the sections that have been added to the profile layout.
- **Collapse All Sections** - Collapse all of the sections that have been added to the profile layout.

### **Add sections**

Sections are automatically created for any of the child objects that you select when you create a profile layout. You can add new sections. For example, along with the child object sections, standard profiles also include sections for **Primary Information**, **External Identifiers**, and **Record Information**.

For this example, we'll add the **Primary Information** section that exists at the top of each standard profile layout. This is where you might want to include names, emails, Network entity ID (VID), primary country, and so on.



## The Harley Street Clinic

Diagnostic Centre Pharmacy W1G 7AF London London, City of GB

**Network Entity ID:** 512859117476381764

**HCO Type:** Pharmacy, Retail

**Modified Date:** 2017-12-19 19:58:03

Field Revisions



▼ Primary Information			
<b>Corporate Name</b>	The Harley Street Clinic	<b>Network Entity ID</b>	512859117476381764
<b>Alternate Name 1</b>	HCA International Limited	<b>Primary Country</b>	United Kingdom
<b>Major Class of Trade</b>	Pharmacy	<b>HCO Type</b>	Pharmacy, Retail
<b>Record State</b>	Valid	<b>Status</b>	Active
<b>Websites</b>	<a href="#">Add URL</a>	<b>Emails</b>	<a href="#">Add Email</a>
<b>Phones</b>	<a href="#">Add Phone</a>	<b>Faxes</b>	<a href="#">Add Fax</a>
<b>Comments</b>	No Value		
▶ Addresses			
▶ Parent HCO Affiliations			
▶ Child Affiliations			
▶ General Information			
▶ External Identifiers			
▶ Licenses			
▶ Custom Fields			
▶ Record Information			

To create a section:

1. At the top of the left panel, click the **Add Section** icon.

The **Add Section** dialog displays with the **Object** predefined. Any sections that already exist in the layout are dimmed in the list; for example, child objects, to ensure that they are not duplicated.

2. In the dialog, type a **Section ID**; for example, Primary Information. Note that this is not the label for the section on the profile. This ID is for internal Network purposes.
3. *Optional.* Type a **Description**.
4. Beside **Labels**, define labels for the section for all applicable languages. At least one label is required. Click **+Add Label**, select the language, and type the label for that language.

If only one label is defined, the section displays with that name, even if your Network instance isn't localized for that language. For example, if your user profile defines English as the language setting, but you only define a French label for the profile layout section, the section name displays in French.

5. Click **Done**.

The new section is added to the bottom of the list in the left panel.



## Adding The Custom Child Object section

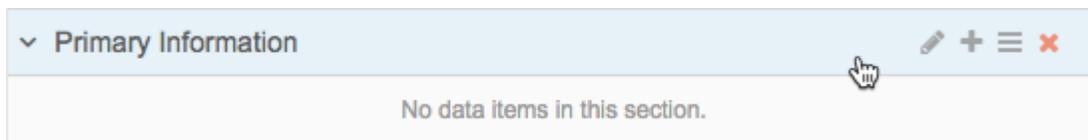
If you add the **Custom Child Objects** section, any custom child objects that have been created in your Network instance are automatically added to the section to ensure that they display consistently in your Network instance. For example, if you have two custom child objects: Research and Training, both of these objects will be listed in your **Custom Child Objects** section with all of their associated fields.

Custom child objects cannot be edited, but they can be moved to another location in the profile layout. To move a custom child object to another section, you must create a new section to move the object into. For example, create a section called Research and move the Research custom child object into that section. When the Research custom child object is moved to its own section, the **Custom Child Object** section is updated to include only the Training custom child object.

## Edit sections

Customize your profile layout by adding fields and moving or deleting sections.

Hover over a custom section to view the actions available. The child objects within sections can also be edited.



- **Edit** - Click the **Edit**  icon to update the **Section ID**, **Description**, and **Labels**. On child objects, you can add labels only.
- **Add Field** - Click the **Add**  icon to add fields to the section. For example, for the Primary Information section for an HCP, you would add First Name, Last Name, Email 1, and so on.

In the **Add Field** dialog, define the following settings:

- **Type** - The type of field that you want to display. The types are filtered on the entity or child object defined for the section. For most fields, choose **Field**. For more information about each type, see the "Field Types" section.
- **Field** - Select the field to add to this section on the profile layout.
- **Full Width** - Define whether the field should be sized to the full width of the section or not. The default value is **False**. Most fields will be **False** but some fields; for example, email fields or URL fields, might require the full width because they can have long field values. Full width is not supported for the Classic profile view.



The dialog box titled "Add Field in Addresses Section" contains the following fields:

- Type\***: Field
- Field\***: -
- Full Width**: True
- Summary Field?**: True

Buttons: Cancel, Add

- **Summary Field** - For child object sections that have collapsed views (Classic profile) or summary cards (New profile) you can indicate if this field should be listed in that summary because it's primary information for the object.
- **Move section** - Use the handle  to move the section and all of its fields to another place in the profile layout. For example, click the handle and drag the **Primary Information** section to the top of the profile layout. All of the sections automatically collapse so you can easily move that section into the correct position on the profile layout.
- **Delete** - Remove the section and all of its fields from the profile layout. If you click the **Delete**  icon, a confirmation dialog displays to ensure that you want to complete the action. Click **Delete** to remove the section.

The dialog box titled "Delete Section" contains the following text:

Are you sure you want to delete the **Addresses** section?

Buttons: Cancel, Delete

## Edit fields

Hover over a field to view the available actions.

- **Edit** - Click the **Edit**  icon to update the following settings:
  - **Type** - The field type cannot be changed.
  - **Field** - Click the value to open the Network data model page for that field in another browser window.
  - **Full Width** - Define whether the field should be sized to the full width of the section or not. The default value is **False**. Most fields will be **False** but some fields; for example, email fields or URL fields, might require the full width because they can have long field values. Full width is not supported for the Classic profile view.
  - **Summary Field** - For child object sections that have collapsed views (Classic profile) or summary cards (New profile) you can indicate if this field should be listed in that summary because it's primary information for the object.



- **Show countries** - Click to view the countries that use the field.

**Edit Field in Addresses Section** ✕

**Type** ? **Field** ?

**Field** [Address Type](#)

**Full Width\*** ?  ▼

**Summary Field?\*** ?  ▼

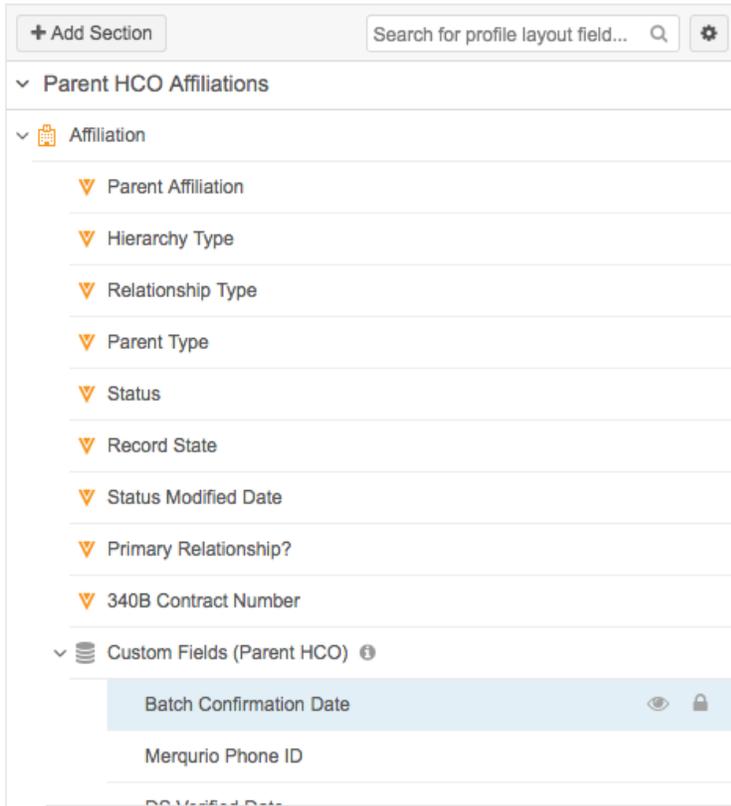
**Countries** ? [Show 47 countries >](#)

- **Move** - Use the handle  to move the field to a different position within the section. Fields cannot be moved to other sections that belong to different child objects. For example, a **Fax** field cannot be moved from the **Addresses** child object section to the **Parent Affiliation** section.
- **Delete** - Remove the field from the section. When you click the **Delete** button, the field is immediately removed. If the field is mistakenly removed, it can be restored by clicking the link in the message at the top of the browser or by adding the field again to the custom section or child object.

Deleted Record State field. [Click here to undo this action.](#)

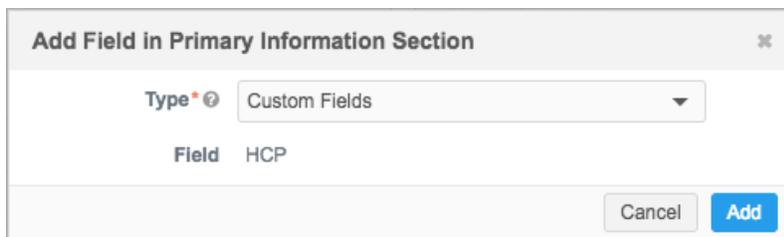
### Adding Custom Fields

Custom fields are automatically added to child object sections that you add to your profile layout. The child object custom fields cannot be moved or deleted from their child object placeholder. For example, in the **Custom Fields (Parent HCO)** placeholder, the **Batch Confirmation Date** and **Mercurio Phone ID** fields cannot be edited.



For the top level HCP and HCO entities, the **Custom Fields** type can be added as its own section (**+Add Section**), or to the end of an entity-level section; for example, a **Primary Information** section.

To add the **Custom Fields** type to an entity-level section, click the **Add +** icon on the section.



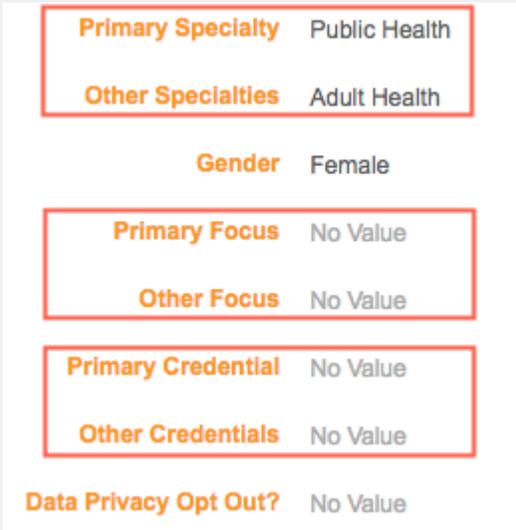
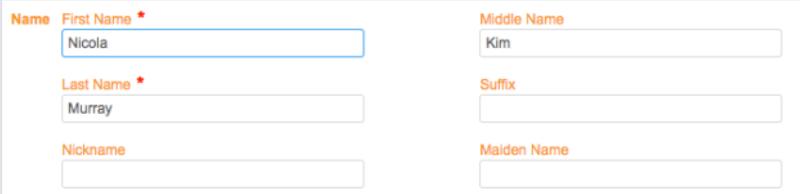
The custom field placeholder and the custom fields will be added to the section.

Custom fields can be moved to another section. To move a custom field to another section, create the field in the other section. The custom field will be automatically removed from the **Custom Fields** type.



### Field Types

Field types define how the fields are displayed in the user interface. Review the list to understand each of the available types.

Type	Description	Entities and Child Objects
Field	The typical type for most Network data model fields.	HCO, HCP, Address, License, Parent HCO, Child HCOs, Contract
Extra Field	Use for fields that do not display in the profile by default, but can be displayed in a pop-up. For example, an address field that users can view if they click <b>Extended Info</b> at the bottom of an address.	HCO, HCP, Address, License, Parent HCO, Custom child objects
Reference Set	<p>A grouping of fields that share the same reference type. For example, Specialty. On a profile, the fields render as Primary Specialty and Other Specialties. Also used for HCP Focus Area, HCO Focus Area, and Credentials. <b>Note:</b> The ordering of fields cannot be changed. For example, if you include HCP Focus Area 1, HCP Focus Area 3, and HCP Focus Area 2 in that order (1,3,2), Network automatically reorders the fields.</p> 	HCO, HCP, Address, Parent HCO
Name Set	<p>This field groups names fields together in a single line (formatted name), but when it is expanded, there are multiple fields that can be edited.</p> 	HCO, HCP, Address, Parent HCO

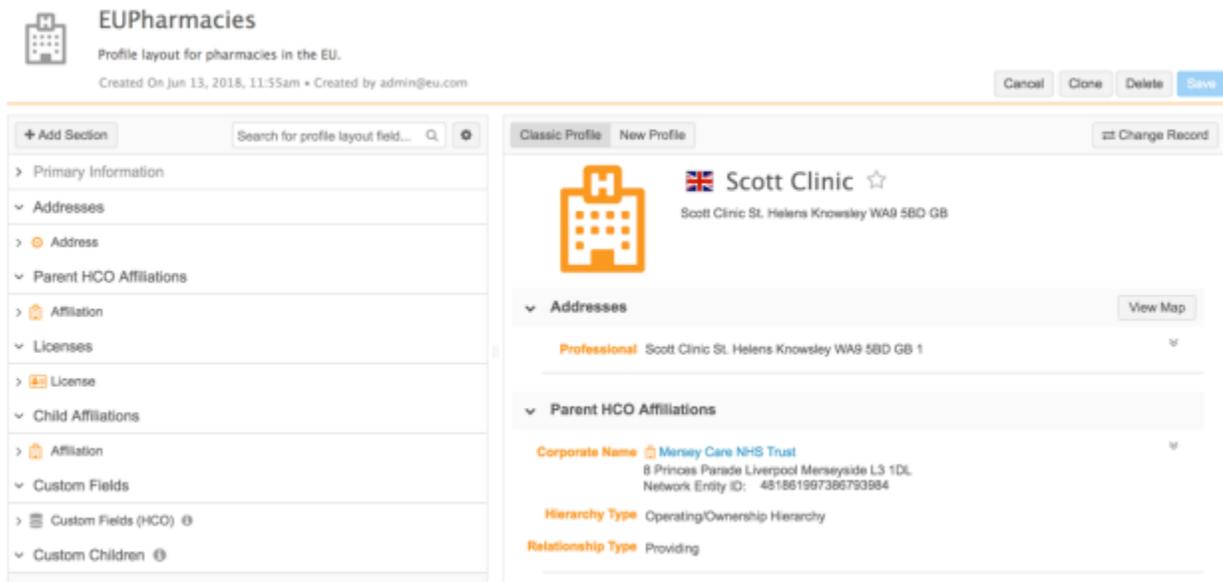


Type	Description	Entities and Child Objects				
Custom Keys	<p>A set of custom keys for the object. Select to create the grouping. Automatically adds the <b>Source</b>, <b>Value</b>, <b>Item Type</b>, and <b>Status</b> fields in the group.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p><b>Custom Keys</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-right: 1px solid #ccc; padding: 5px;"> <p>Source * MASTER__v</p> </td> <td style="width: 50%; padding: 5px;"> <p>Item Type * HCP</p> </td> </tr> <tr> <td style="border-right: 1px solid #ccc; padding: 5px;"> <p>Value * 481862770548016135</p> </td> <td style="padding: 5px;"> <p>Status Active</p> </td> </tr> </table> </div>	<p>Source * MASTER__v</p>	<p>Item Type * HCP</p>	<p>Value * 481862770548016135</p>	<p>Status Active</p>	HCO, HCP (for Address, License, and Parent HCO this field type is automatically added and cannot be changed).
<p>Source * MASTER__v</p>	<p>Item Type * HCP</p>					
<p>Value * 481862770548016135</p>	<p>Status Active</p>					

### Previewing profile layout

Previews are available for all standard and custom profile layouts. On custom layouts, this enables you to review changes that you make before saving them. In the right pane of the layout, search for an entity. Search results are filtered so results are returned only for the same entity type as the profile layout; for example, HCOs.

**Note:** To properly validate your changes, remember to preview entities for the same country or region as the profile layout. Some fields are not used in all countries, so if you are configuring a profile layout for a region (for example, EU) and you preview a record from another country (for example, US), you might not see all of the fields that you have added to your layout.



Profile previews can be viewed in the classic profile view or the redesigned profile view. Use the buttons at the top of the pane to choose either view.

To change the record that you are using the preview the layout, click **Change Record**.



If you make a change to the layout, the preview pane recognizes the change. Click the link to reload the preview pane. If you have enabled the **Auto-Refresh Preview** setting in the **Options** menu, the preview automatically updates.

### *Cloning profile layouts*

Administrators can create a new layout by cloning an existing standard or custom layout. Cloning a layout, instead of creating a layout can be easier because you can clone a layout that is similar to what you need. For example, if you want a new profile layout for pharmacies, you can clone an existing HCO layout that contains many of the fields and sections that you want.

To clone a layout:

1. On the Profile Layouts page, highlight a layout and expand the **Action**  list. Choose **Clone Layout**.
2. In the **Clone Layout** dialog, the **Entity Type** cannot be changed. Type a **Layout Name** and **Description**.
3. Click **Continue**.

The cloned layout opens in edit mode so you can customize the sections and fields.

### *Deleting profile layouts*

Custom profile layouts can be removed from your Network instance if they are no longer required. Only administrators can delete profile layouts.

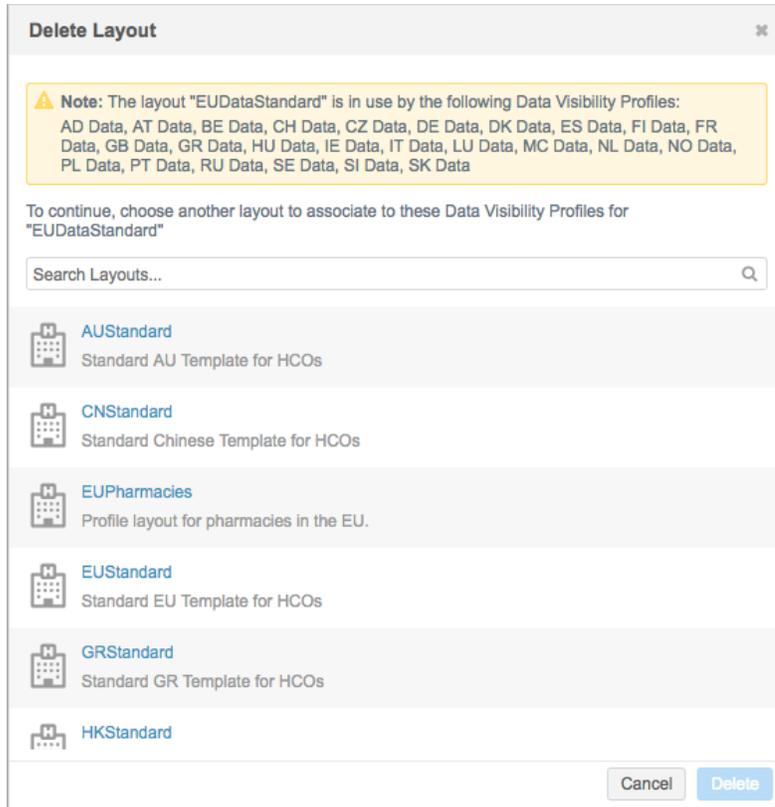
To delete a layout:

1. On the Profile Layouts page, highlight a layout and expand the **Action**  list. Choose **Delete Layout**.
2. In the **Delete Layout** dialog, confirm the removal by clicking **Delete Layout**.

Or

3. If the profile layout is being used by any data visibility profiles (DVPs), the list of data visibility profiles displays in the dialog. You must choose another profile layout to assign to the DVPs.

Select an existing profile layout from the list.



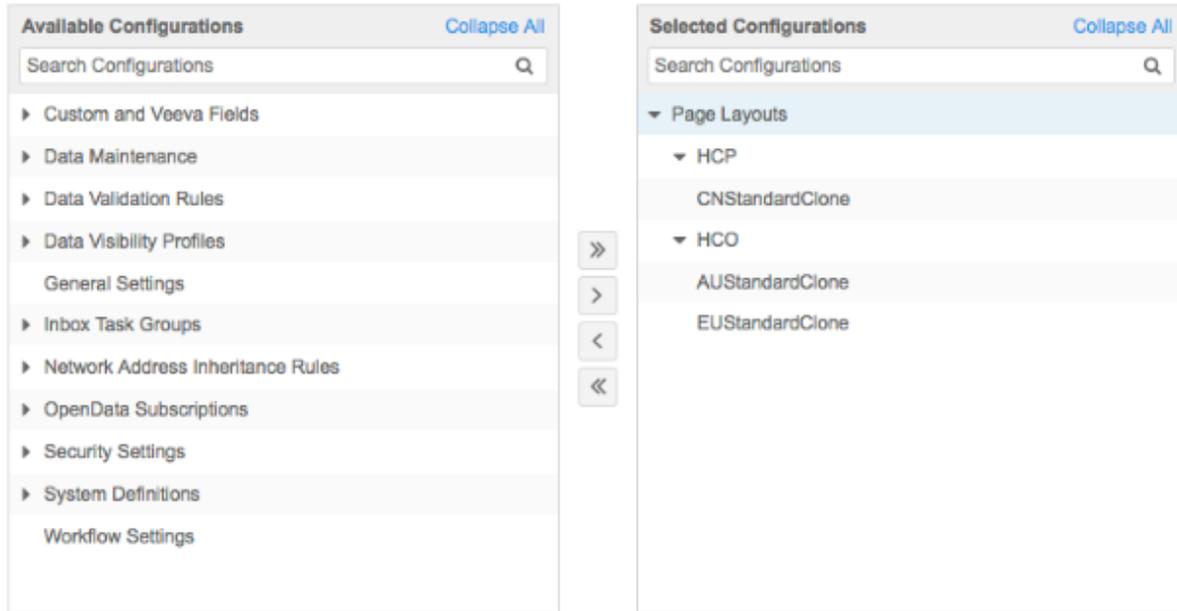
4. When the replacement profile layout has been selected, confirm the removal by clicking **Delete Layout**.

The profile layout is removed from your Network instance, and the affected data visibility profiles are updated with the new layout.

### *Managing configurations*

Profile layouts can be exported to target systems so that you can manage changes between your Network instances.

Custom layouts can be exported between environments using **Configuration Export** and **Configuration Import**. Standard layouts are automatically included in any new environment and cannot be changed, so managing them across environments is not necessary.



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

## GEOCODING

Latitude and longitude fields are now populated and persisted for Canadian (CA) and Australian (AU) addresses after an address is cleansed in Network. Previously, geocodes for addresses only in the United States (US) and France (FR) were persisted.

Geocodes can be used in downstream systems to assist your business processes: for example, event planning and sales performance. You can use the data, for example, to visualize the following on a map:

- HCP locations - Use the data to understand where HCPs practice within proximity to an organization when setting up events.
- Sales data on individual geocoded HCPs - Use the data to compare it against sales data tied to a territory to identify where sales are under performing.
- Coverage across regions - Use the data to align sales reps accordingly.

This enhancement is enabled by default for CA and AU addresses when address cleansing is enabled in your Network instance. These values will display on address records after they are loaded, or after they have been updated.



## General updates

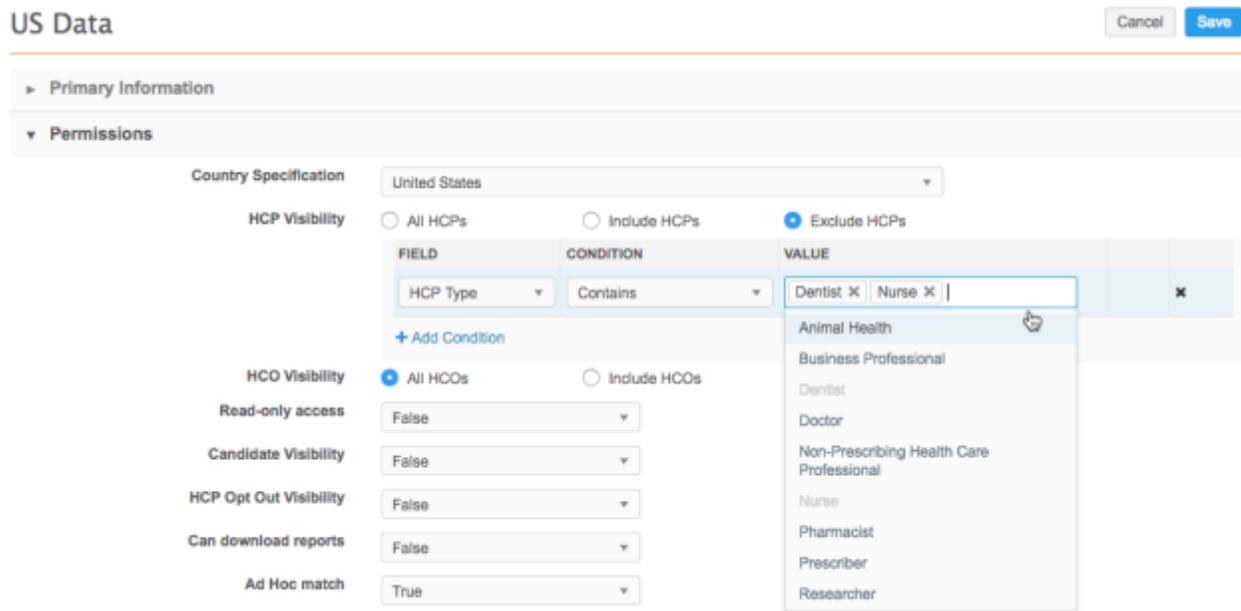
The following enhancements have been added to Network in this release.

### DROP DOWN LISTS

Usability enhancements have been made to drop down lists so they remain open allowing users to easily make multiple selections. Previously, lists would close after a selection was made, so users would have to open it again to make another selection.

This enhancement is enabled by default in all Network instances. It affects filter lists on the following pages in the Network UI:

- Data Visibility Profile page
- Veeva OpenData Subscriptions



### ONLINE HELP

To explain key Network features and processes, overview topics are now available in the *Veeva Network Online Help*. Examples of topics include Architecture, Data Model, Data Privacy, and Workflow. Each topic includes key concepts, tasks by user role, interactive diagrams, and short tutorials to get you started.

Click the **Getting Started** icon on the homepage to view these new topics.



## Data Flow

### Key Concepts

Veeva Network loads and exports data using [subscriptions](#) and [data sources](#). [Source subscriptions](#) load data and depending on the source, cleanse and match it against [Veeva OpenData](#) (if subscribed), or [third-party master data](#).

[Target subscriptions](#) enable you to update downstream systems, such as CRM, with data exported according to filters set in the subscription. Source and target subscriptions are both subject to filters and schedules set by [Administrators](#).

[Data load](#) is highly configurable, with various ways to apply transformations throughout the load process.

### User Roles

Activity	ST	DS	DM	AD
Create source or target systems			●	●
Define source system rankings			●	●
Run source or target subscriptions			●	●
View source rankings			●	●

[Learn more about this topic in context](#)



### DAYLIGHT SAVING TIME

Network now properly adjusts for daylight saving time (DST) in schedules. Previously, the time did not adjust, which affected subscription jobs because they were running an hour later than the time shown in the schedule.

This enhancement is enabled by default in all Network instances.

When administrators or data managers schedule new subscriptions of any kind (source, target, data maintenance job, and so on), the scheduled time will reflect their current time zone. If they are in a geography with DST, the time shown in the Network UI for the configured schedule will adjust and reflect DST. This also applies if a new schedule is added to an existing subscription.

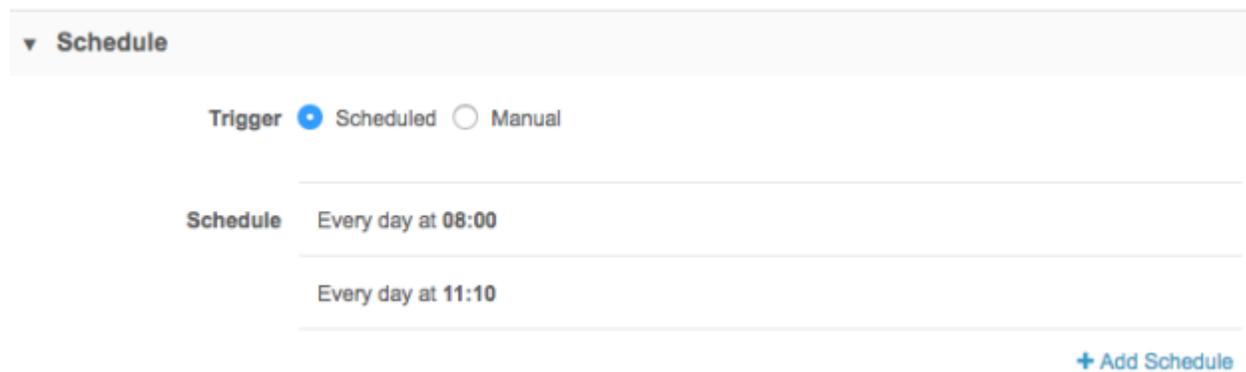


Existing schedules in existing subscriptions will not be automatically updated. However, if the existing schedule in a subscription is updated in any way and then saved, the schedule will update to adjust for DST from that point onwards.

**Note:** The time displayed in the Network UI for any type of schedule reflects the time of that user's computer. If two users open the same subscription in two different time zones, the scheduled time and the time of any previous jobs displays the current time zone of each user's computer.

## JOB SCHEDULES

Saved job schedules now accurately reflect the timezone of your own web browser. Previously, when schedules were saved, the time that displayed was based on the browser time of the user that created the schedule. The timezone does not display in the schedule.



### *Saved schedules example*

Jane works in the EDT timezone and schedules a subscription job to run daily at 8:00am EDT. In the subscription **Schedule** section, the time displays as **08:00**.

Bob works in the PDT timezone. He adds a second schedule to the same subscription to have the job run at 8:10 PDT. In the subscription, the time of his job displays as **08:10**.

### **Before 18R2.0**

The scheduled time was based on the browser time of the user that created the schedule (Jane and Bob).

- Jane (EDT) and Bob (PDT) see two schedules: 08:00 and 08:10.

It looks like the job will run at 8:00am and 8:10am, but (for EDT) it will actually run at 8:00am and 11:10am.

In the **Job History** section, the time the job ran will be correctly aligned with their browser time.



## After 18R2.0

Any saved or new schedules reflect the timezone of the user's own browser.

- Jane (EDT) sees two schedules: 08:00 and 11:10.
- Bob (PDT) sees two schedules: 05:00 and 08:10.

## Job history

The **Job History** section display the actual times that jobs ran. The times displayed have always been and continue to be based on the browser time of each individual user.

ID	DELTA TAG START	DELTA TAG END	START TIME	DURATION	TYPE	OUTCOME
23141	0	932620329257959423	2018-07-06 09:45:00	a few seconds	SCHEDULED	COMPLETE
23139	0	932620329257959423	2018-07-06 08:45:00	a few seconds	SCHEDULED	COMPLETE

## Example

If a job ran at 8:00am EDT and then you change your browser time to be PDT, the job run times will all be changed to display 5:00am PDT.

## REMOVAL OF WEAKER TLS CIPHERS

In version 18R1.2, we have removed support for 1024 bit Diffie-Hellman ciphers and TLS v1.0. Network now supports both TLS v1.1 and TLS v1.2.

To ensure that your integrations continue working with the Network API, your integration process/code must support these stronger ciphers.

## Date change requests

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### RESOLUTION NOTES

Administrators can now set an option so that it is mandatory that all data change requests (DCRs) have a resolution note. Previously, only rejected DCRs required a resolution note. If you require that all DCRs contain a resolution note, enabling this feature will ensure that data stewards are reminded to add one. An error message displays if data stewards or data managers try to resolve a DCR that does not include a resolution note.

This option is available in all Network instances. Administrators must select the **Require Resolution Notes** option on the General Settings page to enable the feature for their Network instance.



## USING TAB AND HOT KEYS

Usability enhancements have been added to the data change request page to help data stewards and data managers process tasks more efficiently.

### *Tab*

Data stewards can use the **Tab** key on their keyboard to move through the fields on the DCR. The first row of the DCR is highlighted by default.

- Pressing the **Tab** key highlights the next row.
- Pressing **Shift + Tab** moves to the previous row.

### *Hot keys*

When a row is highlighted, using specific keyboard letters toggle the user to the appropriate action button:

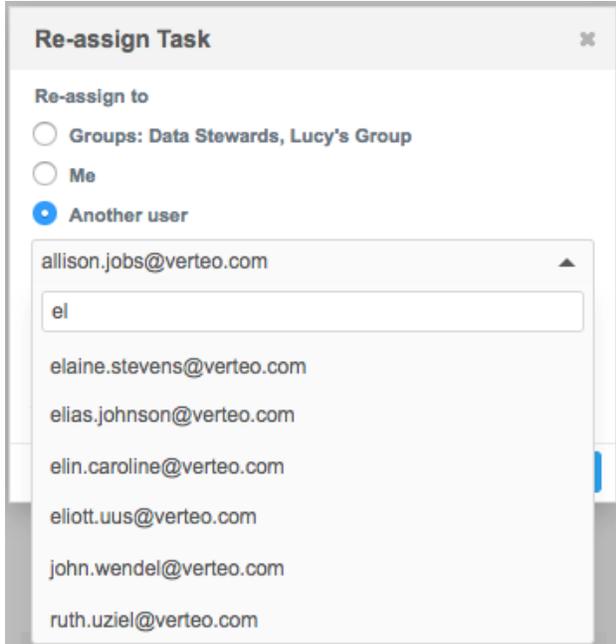
- **A** - Apply 
- **R** - Reject 
- **E** - Edit 

If the field that is being edited is a text field or a drop down list, the field is focused so that users can type or select a value.

## REASSIGN TASK LIST

When data stewards and data managers click the **Re-assign** button in a data change request, they can now more easily find the user that they want to assign the task to.

When the **Another user** option is selected and the list is expanded, the list of users is sorted alphabetically. The list can also be searched, and typing in the search field starts filtering the list for the search term.



### SUSPECT MATCH

Suspect match tasks now indicate match aliases and filters when they are used by the match process. Aliases and filters are used to improve the matching outcomes by making the data more consistent during the matching process. The suspect match task displays any data that was adjusted by aliases and filters so data stewards can understand why the records were considered a match. For each field value that was changed, data stewards can view the altered value of the field that was used during matching.

This feature is enabled by default. It applies to suspect match tasks and source deduplication suspect match tasks.

Suspect Match View Full Screen Re-assign

Fields	Suspect Match Record		Select the surviving record to merge into:	
<input type="radio"/> All <input type="radio"/> Summary	<input checked="" type="radio"/> Holy Spirit Clinic Network ID: 932818948871029120	<input type="radio"/> Holy Spirit Clinic Network ID: 932818934545906095	<input type="radio"/> Holy Spirit Mechanicsburg Center Network ID: 260904622755630080	<input type="radio"/> Spirit Physicians Services INC Network ID: 260605119158109186
▼ How were these matched?				
Matched based on the following defined matched rules:		<ul style="list-style-type: none"> <li>city is the same</li> <li>names are similar</li> </ul>	<ul style="list-style-type: none"> <li>city is the same</li> <li>names are similar</li> </ul>	<ul style="list-style-type: none"> <li>city is the same</li> <li>names are similar</li> </ul>
Field values adjusted during matching:		<ul style="list-style-type: none"> <li>Corporate Name adjusted to HOLY SPIRIT PHYSICIANS SERVICES</li> </ul>	<ul style="list-style-type: none"> <li>Corporate Name adjusted to HOLY SPIRIT PHYSICIANS SERVICES</li> </ul>	<ul style="list-style-type: none"> <li>Corporate Name adjusted to Spirit PHYSICIAN SERVICES</li> </ul>
▼ Primary Information				
Corporate Name	Holy Spirit Clinic	Holy Spirit Clinic	Holy Spirit Mechanicsburg Center	Spirit Physicians Services INC
Network Entity ID	932818948871029120	932818934545906095	260904622755630080	260605119158109186
Primary Country	United States	United States	United States	United States
HCO Type	Organization, Other	Organization, Other	Organization, Group Practice	Organization, Group Practice
Major Class of Trade	Organization	Organization	Organization	Organization
AMA Do Not Contact?	No/False	No/False	No/False	No/False
Status	Active	Active	Active	Active



### Identifying data updates for filter and aliases

On suspect match tasks, the following enhancements have been added so data stewards can see why matches were made:

- **Field values adjusted during matching** - This heading is added to the task below the header section. It lists any fields that were modified by filters and/or aliases during the match process.
- **Field value tooltip** - Beside any field value that was adjusted for aliases or filters, a **Tooltip**  icon displays. Hover over the icon to view the adjusted value of the field that was changed during the matching process.

### About filters and aliases

Filters and aliases can be configured to assist the matching outcomes. Filters can be configured to remove words from a string and aliases can be used to use an alternate name for a word, multiple words or an entire string. They are applied to any record during the match process and they are applied to both incoming records and existing records in a Network instance. Aliases are often used to use an acronym consistently (change NY to NYC) or change an acronym to the full text (change VA to Veterans Affairs). Filters and aliases are configured outside of your Network instance by Veeva. For more information, contact Veeva Support.

**Note:** Aliases and filters are not applied when suspect match tasks are created by data stewards using the **Find Suspect Match** feature in the Network UI; match rules are not applied to these tasks.

### Examples of filters and aliases

Review the examples to understand how aliases and filters can alter the field values to help match outcomes.

- The **Filters** column lists words that are removed from a string.
- The first entry in the **Alias List** column is what is used if any of the words to the right exist in a string; for example, HOSPITAL is used if HOSP is in the string.

Corporate Name field value	Filters	Alias List	Corporate Name field value used during match
Bptst Hosp of Omaha	of	HOSPITAL □ HOSP BAPTIST □ BPTST	BAPTIST HOSPITAL Omaha
West Palm Hospital		COLUMBIA HOSPITAL □ WEST PALM HOSPITAL	COLUMBIA HOSPITAL
Radiological Cntr Services Services of WNY LTD	of, LTD remove duplicate words	RADIOLOGY □ RADIATION, RADIO, RADIOLOGICAL CENTER □ CENTRE, CTR, CNTR  Western New York □ WNY	RADIOLOGY CENTER Services Western New York



## ADD IMAGES TO DCRs

Data stewards can now add images to comments in data change requests. This enables data stewards to provide evidence for how the DCR was validated; for example, a screenshot of the website where they verified the data. It is also helpful when further research is required for the DCR; data stewards can easily find the validation source again using an attached image.

This enhancement is available by default. Administrators must enable it for their Network instance by selecting the **DCR Comment Attachments** option in the **General Settings**.

**Note:** Attachments added in DCR comments are only visible within the same Network instance.

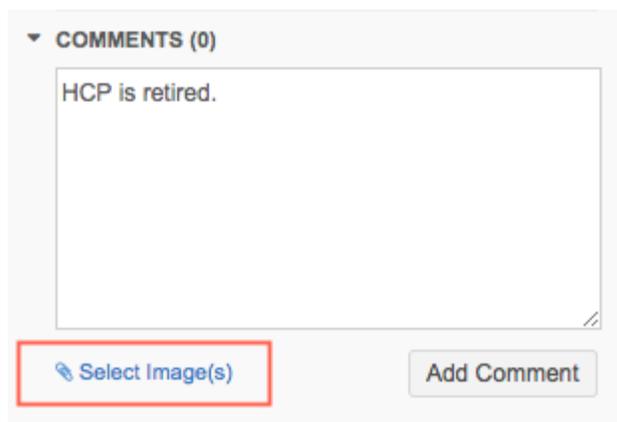
### About images

- Supported format: Images in .jpg or .png format can be added.
- File size: There is no limit to the size of the image that can be uploaded, but larger files are automatically resized to 1MB.
- Number of images: Three images can be added to a comment. There is no limit to the number of comments that can be added to a DCR.

### Adding images

To add an image to a DCR comment:

1. In the right pane of the DCR, expand the **Comments** section.



2. Click **Select Image(s)**.
3. Browse for the image file that you want to add.

### Viewing images

When images are added to DCR comments, they display as thumbnails below the comment. Data stewards can select a thumbnail to view the enlarged image. If there are multiple images, click the arrows to browse through the images.



▼ COMMENTS (1)

▼ linda.jones@verteo.com  
2018-07-11 10:19:31  
HCP is retired.



[Select Image\(s\)](#) Add Comment

### Task audit history

If a DCR includes images, the attachment count is indicated below the comment in the **Message** column of the log.

### Task Audit History

Quick history Date range To

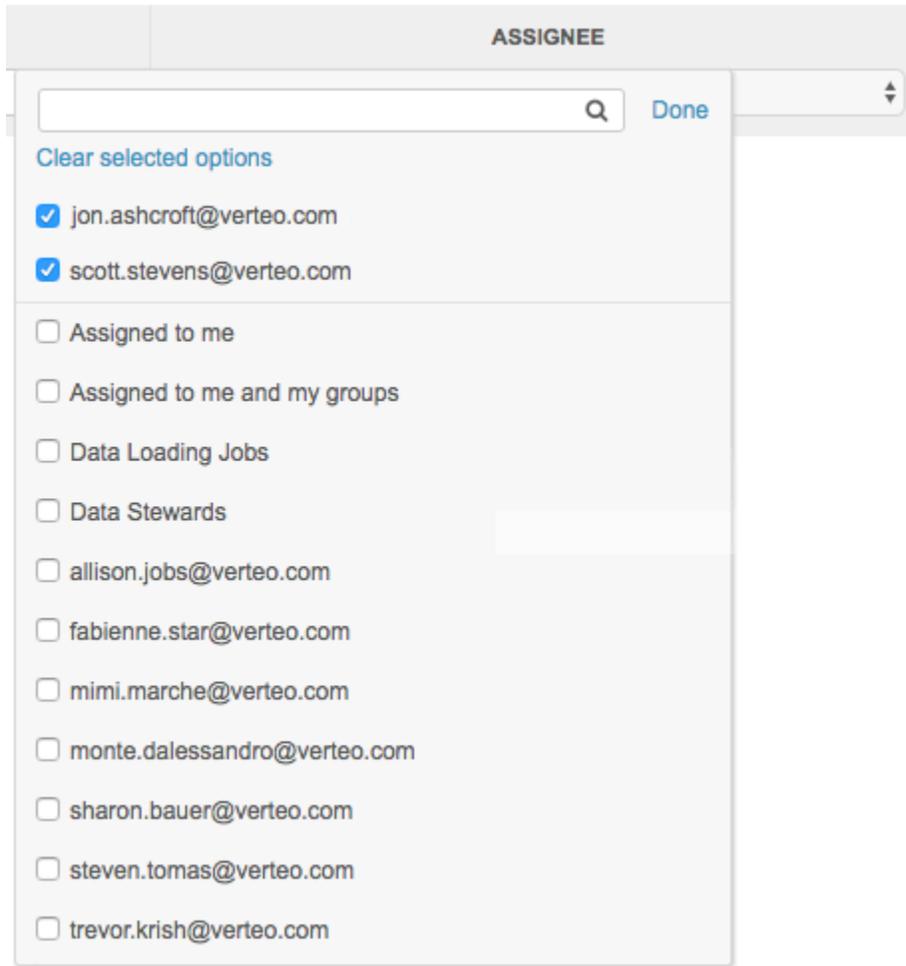
Select time period... or 2018-07-10 2018-07-11 Get History

Showing events for 2018-07-10 to 2018-07-11

[Export to CSV](#)

ID	TASK ID	ACTION DATE	ACTION TYPE	USER NAME	RELATED ITEMS	MESSAGE
623	932738003039289759	2018-07-11 10:19:30	UserComment	Linda Jones	DCR ID: 932738003039289759 Entity ID: 260904990837572609 Job ID: 4249	HCP is retired. [2 attachment(s)]
622	932738003039289759	2018-07-11 10:14:51	UserComment	Scott Woods	DCR ID: 932738003039289759 Entity ID: 260904990837572609 Job ID: 4249	Verified new address. [1 attachment(s)]
621	932738003039289759	2018-07-11 10:14:51	ChangeState	System	DCR ID: 932738003039289759 Entity ID: 260904990837572609 Job ID: 4249	Changed task state from NEW to PROCE...





## Match

---

### CONDITIONAL MATCHING

Administrators and data managers can now use conditional matching in the basic match UI. Previously, conditional matching could only be used in **Advanced** mode. Users will no longer see an error message and will not be prevented from accessing the Basic UI when they open a match configuration that contains properly configured conditional matching.

This enhancement is enabled by default. It applies to all features where match configurations can be managed:

- Ad Hoc Match Configuration
- Match Default Configuration
- Source Subscriptions
- Data Deduplication



### Example

Conditional matching enables users to include or exclude values from specific fields in their match rules. For example, a license match rule can exclude DEA type licenses, or an HCO match rule can include a specific list of HCO types.

In the example below, a filter is applied to the "licenses match" rule so licenses that have the status *Inactive*, *Status Unknown*, or *Unknown* are excluded from the match rule.

The screenshot displays the configuration interface for a match rule named "licenses match". The "Fields" section shows "license\_number\_v (License)" selected. Under "Apply filters", a filter is applied to the field "license\_status\_v ...". The "Values" list for this filter includes "Inactive", "Status Unknown", and "Unknown", all of which are checked, and "Active", which is unchecked. The "Function" is set to "Exclude". Other settings include "Comparison method" set to "Direct field", "Null value options" set to "Neutral", "Success criteria" set to "One", and "Algorithms" set to "Jaro-Winkler" with a threshold of 0.9.

### Add conditions to match rules

To use conditional matching in the match UI:

1. In any of the features where you can manage match configurations, click the **Match Rules** tab.
2. Open a new or existing HCP or HCO feature.
3. In the **Apply Filters** section click **+Add Filter**.
4. Expand the **Field** list and select a data model field.
5. Expand the **Value** list and select the specific values for the condition.
6. In the **Function** list, choose either **Include** or **Exclude**.



7. To create additional filters, click **+Add Filter** again and configure the filter.
8. Click **Done**.
9. **Save** your changes.

The filter will be applied the next time the match rules run.

## Data export

### REFERENCE DATA VERSION

A new version, V7.0, is now available for reference data exports in target subscriptions. If administrators or data managers choose to export reference data and select **V7.0**, the exported .csv file will include target alias codes and names.

The new reference data version is available in all Network instances by default.

### Exported reference data file

Previous versions of the exported reference data included target alias codes (if they existed) in the Network Code column (A), but did not include the target alias name. In V7.0, if target aliases exist, columns will be included for the code and name. If target alias names or codes do not exist for a particular row, those columns will be empty.

Network	Target Alias	Target Alias Name	Reference Type	Active Col	Inactive Col	Definition	Active	Veeva M	EN	ZH	FR	ES	DE	IT
F	1	Target Alias 1	HCPGender	AD,AR,AT,AU,BE,BR,BY,C	This HCP is f	TRUE	TRUE	Female	À*è	Femme	Mujer	Weiblich	Fer	
M	1	Target Alias 1	HCPGender	AD,AR,AT,AU,BE,BR,BY,C	This HCP is m	TRUE	TRUE	Male	Ai	Homme	Hombre	Männlich	Ma	
U	2	Target Alias 2	HCPGender	AD,AR,AT,AU,BE,BR,BY,C	The gender c	TRUE	TRUE	Unknown	Èü*Ài*	Inconnu	Desconocido	Unbekannt	So	

### Choosing the reference data version

In new target subscriptions (**System Interfaces > Target Subscriptions**), V7.0 will be selected by default. Existing subscriptions can be updated to use **V7.0** if you want your exported file to contain the target alias details.

#### REFERENCE DATA

Include Reference Data   
Files

Reference File Version

- V7.0
- V6.0
- V5.0
- V4.0
- V3.0
- V2.0

#### FILE FORMAT



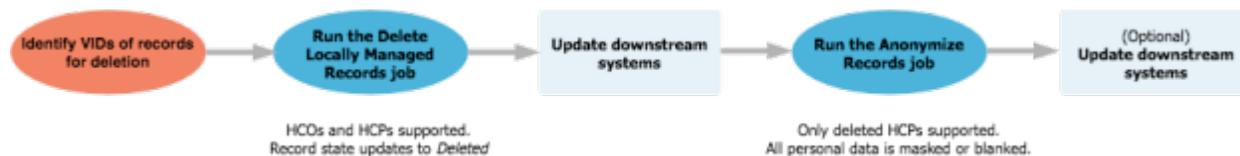
## Data maintenance

Features have been added in this release to help customers comply with the European General Data Protection Regulation (GDPR). The features enable you to support requests from HCPs to remove their personal data and to remove records for data storage period limitations. Using these features, you can delete locally managed HCO and HCP records and anonymize HCP records so that personally identifiable data is removed. They are also useful for removing records from your Network instance that are no longer being updated.

The following data maintenance jobs have been introduced in this release:

- **Delete locally managed records** - HCP and HCO records can have their record state set to *Deleted*. The records will not be searchable in your Network instance, but the data can still be accessed through reporting and tasks.
- **Anonymize HCP records** - HCP records (managed locally or by Veeva OpenData) that have a record state of *Deleted* can be anonymized so that all personal data is completely removed from the record. An anonymized record is completely inaccessible in the Network instance. If the record is exported to downstream systems, only the record information (created date, Network entity ID, and so on) can be viewed.

Use the features together to process HCP records for GDPR compliance.



For more information, review the topic for each feature.

## DELETING RECORDS

Administrators and data managers can now delete locally managed records in Network using a data maintenance job. Deleting records is important for complying to GDPR requirements around data retention periods and the ability to remove personal data for HCPs, if requested. It is also helpful for removing locally managed records from your Network instance that are no longer being updated or are no longer useful; for example, candidate records. When records are deleted, the record state (`record_state__v`) for the HCP or HCO and its associated child objects is set to *Deleted*. Users can no longer access the record using Network search. Deleting locally managed records cannot be reversed.

This feature is available by default, but administrators must enable the feature in their Network instance.

1. In the Admin console, click **Settings > General Settings**.
2. In the **Data Maintenance** section, click the **Delete locally managed records** setting.



## Applicable records

The data maintenance job supports HCP and HCO records that meet the following requirements:

- Records are locally managed. Records that are managed by third party data providers or Veeva OpenData are not supported.
- The record state (`record_state__v`) is *Valid*, *Deleted*, or *Invalid*. The following record states cannot be updated to *Deleted*:
  - *Under\_review* - The record is pending and must be processed by a data steward.
  - *Merged\_into* - The record was the loser of a merge. These records cannot be deleted during this job, but HCPs with this record state will be anonymized in your Network instance if the merge winner is included in an Anonymizing Records job.

## Delete job impact

When the data maintenance job runs, it has the following impact:

- The record state (`record_state__v`) updates to *Deleted*. Associated child objects are also deleted.
- Associated custom keys are set to *Inactive* (`custom_key_status__v`).
- The record state of relationships pointing to a deleted HCO is updated to *Invalid*.
- The records can no longer be found using Network search.
- Pending tasks (add and change requests and suspect matches) are automatically closed after the job runs. For more details, see the section below called "*DCR considerations*."

**Note:** The delete action is considered a "soft delete." Deleted records are restricted in the Network user interface, but they are still accessible through some features. To comply with GDPR requirements, personal data on HCP records can be completely removed from Network using the Anonymize Records feature.

## Delete records

To delete locally managed records, administrators and data managers can configure a data maintenance job. The job requires a .csv file containing the Network entity IDs (VIDs) of the applicable records.

To create the data maintenance job:

1. In the Admin console, click **System Interfaces > Data Maintenance**.
2. In the **New Data Maintenance Job** dialog, select **Delete Locally Managed Records**.

The New Deletion Job page displays.

3. In the **Details** section, type a **Name** and **Description** for the job.



## New Deletion Job

Cancel

Save

### ▼ Details

Name

Action

- Sets the record state of HCOs and HCPs to 'DELETED'
- Deletes all associated child objects
- Inactivates custom keys

Note: This action cannot be reversed

[Learn more](#)

Description

### ▼ Settings

Allow File Reprocessing ?

Job Error Log ?

### ▼ Select Records

Enter the path and file name of a one column CSV file that contains the vid\_\_v of selected records.



- In the **Settings** section, select any of the following options:
  - Allow File Reprocessing** - Select if you want a permit a new job to start even if the file has been previously processed.
  - Job Error Log** - Select if you want an error log to be exported to your FTP server.
- In the **Select Records** section, define the file path and name of the .csv file.

The .csv file must have one column that contains the list of VIDs for the records that you want to delete.

delete_vids.csv	
1	481646482991088641
2	481863040191431688
3	478881650273420289
4	479680046080984065
5	479661471731549185
6	930228843042832415
7	930228832882262047

- Save** your changes.



### Run the delete job

When the data maintenance job is configured, run it to delete the required records.

To start the data maintenance job:

1. In the data maintenance job that you just configured, click **Start Job**.
2. When the job completes, a **Job History** section displays at the bottom of the page with some summary information.

▼ Job History						
ID	START TIME	DURATION	TYPE	OUTCOME	DELETED HCPS	DELETED HCOS
1880	2018-06-14 12:27:00	a minute	MANUAL	COMPLETE	33	No Value

3. Click the job **ID** to open the Job Details page.
4. On the Job Details page, review the number and type of records that were deleted during the job.

The **Rows Read From File** section indicates the number of rows in the .csv file. The **Entities Parsed From File** section displays how many records for each entity were loaded and used. Unrecognized and incorrect VIDs, or extraneous data, are ignored and not included in the **Rows Parsed** column.

If errors occur during the job, a **Job Error Log** section displays at the bottom of the page and identifies any records that could not be deleted.



## Job Details (ID: 1880)

Cancel Job

### ▼ Overview

<b>Subscription</b> delete	<b>Action</b> Delete Locally Managed Records
<b>Start Time</b> 2018-06-14T12:27:00-04:00	<b>Job ID</b> 1880
<b>Duration</b> a minute	<b>Percent Complete</b> 100.00%
<b>Current Stage</b> FinalStage	<b>Outcome</b> COMPLETE
<b>Started By</b> admin1	<b>Trigger</b> MANUAL

### ▼ Data Load Summary

ROWS READ FROM FILE	
Records	33
ENTITIES PARSED FROM FILE	
HCP	33

### ▼ Entities Updated Summary

	RECORDS DELETED	RECORDS INACTIVATED
HCP	33	0
HCO	0	0
Address	61	0
License	38	0
Parent HCO	21	0
Custom Keys	0	41

For the records in the .csv file that are locally managed and have the record state *Valid*, *Deleted*, and *Invalid*, the job updates the record state (`record_state__v`) to *Deleted*; any other records are ignored during the job. Associated child objects are also set to *Deleted* and custom keys are set to inactive.

Errors will occur for the following situations:

- The record state of the VID is *Under\_review* or *Merged\_into*.
- The record is not locally managed. Records that are managed by Veeva OpenData or third party data providers cannot be deleted using this feature.

### *DCR considerations*

When records are deleted, any pending tasks for the records (including queued DCRs) are automatically rejected and closed after the job runs. Resolution notes are automatically added to the rejected DCRs and the tasks remain visible in the inbox and from the My Requests page.



Tasks cannot be closed in the following situations:

### Suspect matches

- If there are more than two VIDs in the suspect match task, and the deleted VID is not the source record, the deleted VID is removed from the task when the task is opened in the UI.

### Add requests

- An HCP or HCO is added and the **Create Unverified** option is enabled in the Network instance. This option automatically assigns a VID to a record as soon as the task is submitted. In this case, the record state will be *Under\_Review*, so the record cannot be deleted. The task must be processed by a data steward.
- A parent HCO is added and the VID of the parent record is deleted. The task cannot be closed because it is associated with the child object (parent HCO). The task must be processed by a data steward. If the add request is approved, then the relationship is invalidated and is not visible in the Network UI.

Additionally, for DCR processing, if you are using Network address inheritance in your Network instance, if data stewards try to link to a parent HCO that has been deleted, a DCR validation error occurs. The link to the parent HCO must be deleted before the DCR can be processed.

### Next steps

Update your downstream systems with the deleted records. Use target subscriptions or the Network API to export the records.

The delete action is considered a "soft delete." Deleted records are restricted in the Network user interface, but they are still accessible in the following ways:

- Users can continue to access the deleted record if they enter the VID into the Network URL.
- Tasks associated with the records are still available to view in the Inbox and from the My Requests page.
- Data is not purged from the reporting database, so it continues to be accessible in reports, data lineage, and revision history.
- The record and all of its data can be exported to downstream systems using target subscriptions and the API.

To comply with the GDPR requirements to remove all personally identifiable data at an HCP's request, administrators can now anonymize any of these deleted HCP records and export them to their downstream systems.

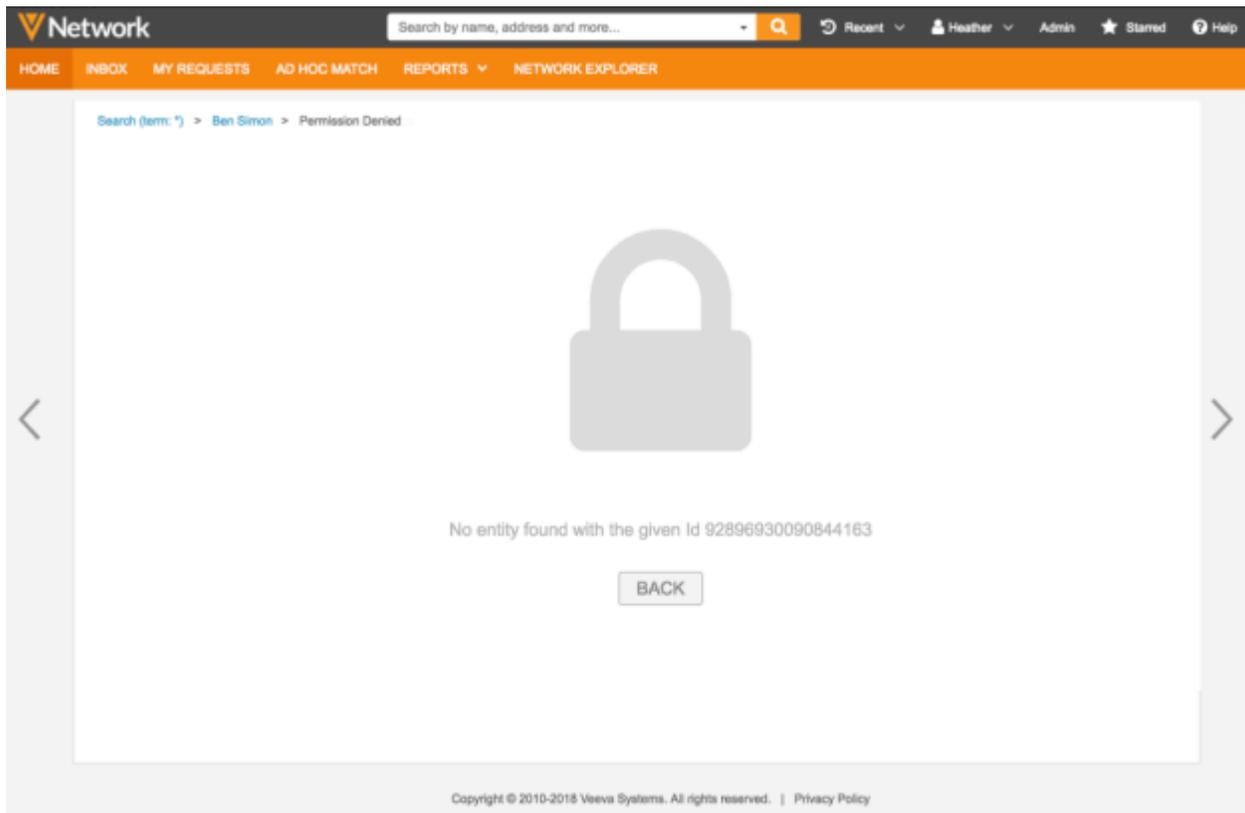
**Note:** In Veeva CRM, records in *Deleted* state cannot be updated so exporting records from Network after anonymizing them will not update the records further. To ensure that personally identifiable information is removed, delete the records directly from Salesforce™.



## ANONYMIZED RECORDS

Network administrators and data managers can now create data maintenance jobs to anonymize deleted HCP records. This feature helps customers comply with the European General Data Protection Regulation (GDPR) by supporting requests from HCPs to remove their data and to remove records that exceed data storage period limitations. When deleted HCP records are anonymized, all of the personal data is masked or blanked out and access to the record is further restricted in the Network instance. If records are exported to downstream systems, only record information and data that is not personally identifiable (created date, last modified date, VID, record state, and so on) can be viewed.

When a deleted HCP has been anonymized, users can no longer access the record in their Network instance.



This feature is available, by default, but administrators must enable the feature in their Network instance. In the Admin console, click **Settings > General Settings**. In the **Data Maintenance** section, click the **Anonymize records** setting.

Selecting the feature automatically enables a new HCP field in the Network data model, `is_anonymized__v`. This field value is *False* on all records until a record has been anonymized using this data maintenance job.



### *Applicable records*

Deleted records (record state = *Deleted*) that are locally managed or Veeva OpenData managed can be anonymized; records that are mastered by third party data vendors are not supported.

Veeva OpenData records can be deleted using a process that is different from the **Delete Locally Managed Records** data maintenance job. For more information, contact Veeva Support.

### *Anonymize job impact*

After the records have been anonymized, they are no longer accessible to users in the Network instance. They can be exported to downstream systems using target subscriptions, but not using the Network API.

Review this list to understand the behavior to expect for anonymized records for the following features:

- **Search** - Anonymized records cannot be found using Search.
- **Recent Items** - If users viewed an HCP record recently and then it was anonymized, when they try to access the HCP again by clicking **Recent Items**, the record will not be displayed in the list; they are removed from **Recent Items**.
- **Tasks** - Users cannot view any tasks (add and change requests and suspect matches) related to anonymized records; tasks will not be available in My Requests, the inbox, task audit history, or by entering the task ID in the Network URL.

**Note:** Pending DCRs for deleted records are closed in Network and the task status should be pushed to downstream systems (for example, Veeva CRM). There could be some cases where DCRs are not being closed in downstream systems, so to avoid disruptions within the Veeva CRM bridge, DCRs for anonymized records are accessible through the Network API.

- **Profiles** - Anonymized records cannot be viewed on the profile page. If users enter the Network entity ID of an anonymized record into the Network URL, the "locked" page with the "No entity found" message displays instead of the record. All related pages (for example, Revision History) are also unavailable for the record. Locally managed anonymized records cannot be reversed.

For deleted Veeva OpenData records, if the **Search OpenData** option is enabled in your Network instance, the profile page of the record from OpenData displays and users can download the record again. If the record is downloaded again it will be considered a new record, so all previous custom values and custom child object fields will be empty.

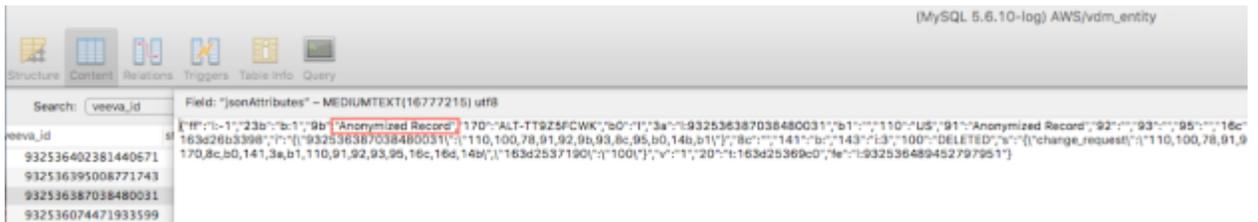
- **Opted-out records** - If an opted-out HCP record is included in an anonymization job, the anonymization behavior overrides the opted-out behavior in target subscriptions and the API. The data model fields (`data_privacy_opt_out__c` and `data_privacy_opt_out__v`) are set back to *No Value*.

If you re-subscribe to a Veeva OpenData record, and the original record was opted out, the opt out behavior depends on which field was set to *True*:

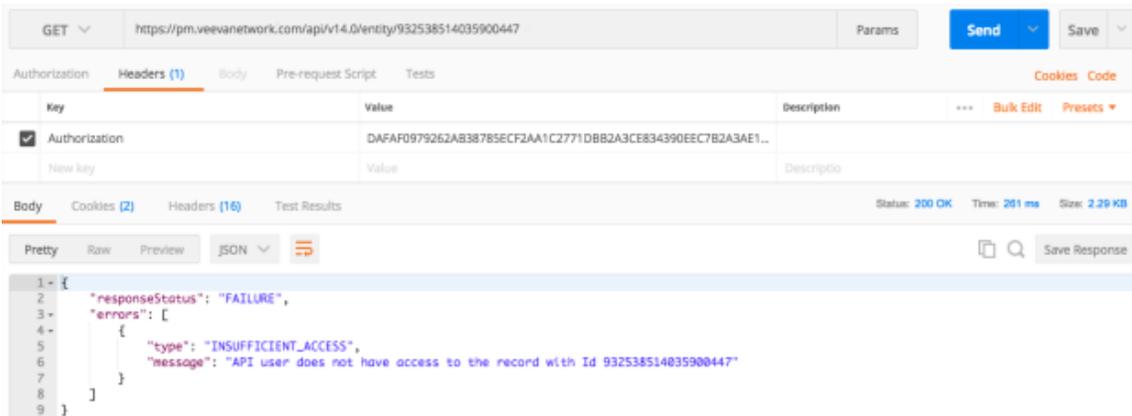
- `data_privacy_opt_out__c` - the opt out behavior is not restored.



- `data_privacy_opt_out__v` - the opt out behavior is restored.
- **Data model fields** - The `is_anonymized__v` field is set to *True*. Fields that are on the HCP record, child objects, and associated merge losers will be blanked out, masked or retained.
  - Masked with "Anonymized Record" - All name fields (for example, formatted name, first name, last name, and alternate names).
  - Blanked out - All custom (`__c`) fields (except for alternate keys and checkbox fields) and standard (`__v`) fields that contain personally identifiable information (addresses, phones, email, and so on).
  - Retained - Record information and data that is not personally identifiable (for example, VID, created date, record state, last modified date), custom alternate keys, and any checkbox fields. Status fields (`address_status__v`, `license_status__v`, and `parent_hco_status__v`) will be set to inactive and will be retained on the record.
- **Data Lineage** - When a record is anonymized, the data lineage is unassociated from the record.
- **Merged records** - Records that have been merged into the deleted HCP (merge losers) are also anonymized during the job. After the job runs, unmerge is no longer possible.
- **Reports** - Anonymized records and related information (for example, DCRs, revision history, and so on) are not returned in reports. After the anonymize job runs, all data associated with the anonymized records are purged from the reporting database during the next database update.
- **Custom child objects** - If an HCP is anonymized, any associated custom child objects will also be anonymized. Any data in custom child objects will also be masked, blanked-out, or retained.
- **Source subscriptions** - If data are loaded that match existing anonymized records in your Network instance (based on the VID, values, or keys), it does not merge with the anonymized records.
- **Target subscriptions** - If anonymized records are exported to downstream systems, only the fields that have been retained on the record can be viewed.



- **Network API** - After records are anonymized, data cannot be retrieved using the API.





### Data model

To support this new feature, a new field, `is_anonymized__v` is added to the Network data model. The field is disabled by default, but will be enabled if the feature is turned on in your Network instance. The field value cannot be edited by users in the Network UI, it can only be updated through the data maintenance job.

### Anonymize records

To anonymize records, administrators and data managers must create a .csv file containing the applicable Network entity IDs (VIDs). Locally managed and Veeva OpenData managed HCP records with a record state of *Deleted* can be anonymized.

### Prerequisite

Ensure that deleted records have been exported and updated in downstream systems.

To create the data maintenance job:

1. In the Admin console, click **System Interfaces > Data Maintenance**.
2. In the **New Data Maintenance Job** dialog, select **Anonymize HCP Records**.

The New Anonymization Job page displays.

3. In the **Details** section, type a **Name** and **Description** for the job.

**New Anonymization Job** Cancel Save

**Details**

**Name**

**Action**

Remove all personal data from soft-deleted HCP records  
Note: This action cannot be reversed on local records  
[Learn more](#)

**Description**

**Settings**

Allow File Reprocessing ?  Job Error Log ?

**Select Records**

Enter the path and file name of a one column CSV file that contains the `vid__v` of selected records.

?



4. In the **Settings** section, select any of the following options:
  - **Allow File Reprocessing** - Select if you want to permit a new job to start even if the file has been previously processed.
  - **Job Error Log** - Select if you want an error log to be exported to your FTP server.
5. In the **Select Master Records** section, define the file path and name of the .csv file.

The .csv file should contain only a single column that contains the list of VIDs for the records that you want to anonymize.

**Note:** A limit of 5000 HCPs can be included in the .csv file. The job will fail if the limit is exceeded.

Line	VID
1	911646482991088111
2	471863040191431683
3	938881650273420214
4	472530046080984052
5	495731471731549185
6	471228843042832264
7	931348832882269072

6. **Save** your changes.

### Run the anonymization job

When the anonymization job runs, personally identifiable information on the record is masked or blanked and the field `is_anonymized__v` is set to `True`. This only occurs for the records in the .csv file that have a deleted record state. Any associated merge losers (the record state is `merged_into`) are also anonymized, even if they are not included in the .csv file.

To start the data maintenance job:

1. In the data maintenance job that you just configured, click **Start Job**.
2. When the job completes, a **Job History** section displays at the bottom of the page with some summary information about the job.

▼ Job History						1 of 4 < >
ID	START TIME	DURATION	TYPE	OUTCOME	ANONYMIZED HCPS	
<a href="#">1878</a>	2018-06-14 11:51:00	a minute	MANUAL	COMPLETE	33	
<a href="#">1839</a>	2018-06-13 11:30:00	a minute	MANUAL	COMPLETE	15	
<a href="#">1804</a>	2018-06-11 23:55:00	a few seconds	MANUAL	COMPLETE	14	

3. Click the job **ID** to open the Job Details page.
4. On the Job Details page, review the number and type of records that were anonymized during the job. The **Job Error Log** section identifies any records that could not be anonymized during the job.



## Job Details (ID: 1878)

Cancel Job

### ▼ Overview

Subscription	anonymize	Action	Anonymize HCP Records
Start Time	2018-06-14T11:51:00-04:00	Job ID	1878
Duration	a minute	Percent Complete	100.00%
Current Stage	FinalStage	Outcome	COMPLETE
Started By	admin1	Trigger	MANUAL

### ▼ Data Load Summary

ROWS READ FROM FILE	
HCP	33
ENTITIES PARSED FROM FILE	
HCP	33

### ▼ Entities Updated Summary

RECORDS ANONYMIZED	
HCP	33
Address	61
License	38
Parent HCO	21

Only HCP records that have been deleted can be anonymized. Any records in the file that have other records states are ignored.

Errors will occur for the following situations:

- The record is an HCO.
- The record state is anything other than deleted.
- The child objects on the record are not in deleted state. This occurs if the child object was not deleted using the Delete Locally Managed Records job; they were deleted in a non-standard way.
- The record has already been anonymized.

### *Next steps*

After the HCP records have been anonymized, you can export the records to your downstream systems using target subscriptions.

In downstream systems, all personal data is masked with the *Anonymized Record* string or removed completely (blanked out). Only record information and data that is not personally identifiable are retained.



## ANONYMIZE RECORD LIMIT

The number of HCP records that can be included in the .csv file for the anonymize records job has been extended to 60,000. Previously, the limit was 5,000 HCP records.

## Logs

### SEARCH AUDIT HISTORY

Search logs are updated to include more information for administrators. Administrators can use the new log data to understand the users that are searching and see what they are searching. This data can identify poor search behavior and the need for training.

Search Audit History

Quick history:  or  to    [Export to CSV](#)

TIMESTAMP	NETWORK USER NAME	SEARCH USER NAME	STATUS	FOUND	RETURNED	QUERY	ADDRESS QUERY	DATA TYPES	ORIGIN	SUB-ORIGIN
2018-07-09 18:41:19 IST	om.bridge@veeva.com	sjones@veeva.vorm.com	SUCCESS	213	50	Joseph Cantarino PA	Philadelphia, PA	HCO,HCP	CRM Online	prim
2018-07-09 18:40:58 IST	dhassan@veeva.com	dhassan@veeva.com	SUCCESS	17733	10	*	Austin, TX	HCO,HCP	Search Bar	prim
2018-07-09 18:40:24 IST	om.bridge@veeva.com	swoods@veeva.vorm.com	SUCCESS	1	1	Eric Bosworth NJ	Seattle, WA	HCO,HCP	CRM Online	prim
2018-07-09 18:39:35 IST	om.bridge@veeva.com	dstevena@veeva.vorm.com	SUCCESS	2	2	Brian Bredt WA	Seattle, WA	HCO,HCP	CRM Online	prim
2018-07-09 18:39:26 IST	om.bridge@veeva.com	drams182@veeva.vorm.com	SUCCESS	2	2	Robert Handier MA	Boston, MA	HCO,HCP	CRM Online	prim

These enhancements are enabled by default in all Network instances.

### Search user name

As part of the Network-Veeva CRM integration, the field rep's user name who perform a search during Network Account Search can be identified by administrators. A new column, **Search User Name**, is added to identify the end user who is searching. For Network/API search origins, the Network user name displays.

The Username column has been renamed to **Network User Name**. The data in this column identifies the Network user. For example, for sales reps searching in Veeva CRM, the **Network User Name** will be the name of the Network integration user that connects to Veeva CRM. The **Search User Name** is the user (field rep) who is searching for an HCP or HCO.

### Search origin

The **Origin** column identifies where the search occurred. A new filter called **Search Origin** is added to the page so administrators can easily view searches by specific features; for example, Search Bar, Advanced Search, CRM Online, and so on. To filter the table, click the Search Origin field and select a search origin from the list.

### Address query

A new column called **Address Query** is introduced so administrators can view the address details that were entered by a field rep during Network Account Search on all platforms. This data will not be backfilled.



## Exporting log data

All of this new data is included in the exported .csv file.

## Admin settings

---

### GENERAL SETTINGS

The General Settings page has been redesigned so that administrators can more easily find and update settings for their Network instance.

Overview of changes:

- Sections have been added so administrators can easily scan the page and find the related settings.
- The **Edit** button has been moved to the top of the page.

## General Settings Edit

▼ Version Information

Build ID: 37063	Build Time: June 14, 2018 09:48:37
Customer Master Version: 18R1.2.0	

▼ Network Information

Domain Name: verteodev.verteo.com	Network Name: verteodev
Network ID: 519	POD Name: SANDBOX
Default Time Zone: (GMT-05:00) Eastern Standard Time (America/New_York)	

▼ Application Settings

COUNTRY SETTINGS

Default Country: US

---

SEARCH SETTINGS

- 'AND' mode searches require all query terms to be present.
- 'OR' mode requires just a single term to be present for the result to be returned.

Search Query Mode: AND

---

SESSION DURATION

Logout user after: 8 hours of inactivity

▼ Feature Settings



## API

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The Network API is updated to v15.0.

### SUSPECT MATCHES

A new API call has been introduced so that suspect match tasks can be created through customer web portals. Some customers have web portals that enable HCPs to log in to find information about products, events, and so on. If HCPs find duplicate records of themselves, they can now request that the records be merged by submitting a suspect match task using the Network entity IDs of the records. Previously, customers would fax a data change request or email to data stewards to request record merges. Customer web portals do not recognize ownership of records, so Network ensures that the suspect match requests are routed to the appropriate data stewards (local or Veeva OpenData).

This feature is enabled by default.

#### *Creating a suspect match API call*

Customer web portals submit suspect match API calls using the Network integration user credentials. Users can only create suspect match tasks on records that they have visibility to through their data visibility profiles. When the API is created, only the surviving and merged entity IDs of records can be defined. The API call contains the following fields:

- `creator` - The name of the user who is generating the request
- `vid_key` - The entity ID of the record to be merged; the losing record.
- `matching_vid_key` - The entity ID of the surviving record.
- `note` - (optional) Details about the request.
- `source` - (optional) Additional information about the request.

For more information about the API call, see the "Batch Create Suspect Match" section below.

#### *Suspect match request routing*

Customer web portals do not recognize ownership of records. Network automatically routes suspect match tasks to the appropriate data stewards. If any of the records in the request are customer-owned, the suspect match request is routed to local data stewards.

Original Entity	Matched Entity	Suspect Match Task Routing
Customer	Customer	Customer data stewards
Customer	Veeva OpenData	Customer data stewards
Customer	Third party master	Customer data stewards
Veeva OpenData	Customer	Customer data stewards OpenData record always wins.



Original Entity	Matched Entity	Suspect Match Task Routing
Third party master	Customer	Customer data stewards Mastered record always wins.
Veeva OpenData	Veeva OpenData	Veeva OpenData data stewards
Third party master	Third party master	Suspect match task is not supported. The request is automatically rejected.
Third party master	Veeva OpenData	Suspect match task is not supported. The request is automatically rejected.

**Note:** If the task contains a master record (Veeva OpenData or third party master) as the matched entity and a customer-owned record as the original entity, Network automatically flips the records so the master record always survives.

#### Suspect match tasks are auto-rejected when the API call includes the following records:

- Two third party records - Third party mastered entities cannot be merged.
- Third party record and a Veeva OpenData record - Records from different mastered sources cannot be merged.
- Records with different entity types (for example, HCO - HCP).
- A record that is already a merged\_into record
- A record that the user does not have visibility to through their data visibility profile permissions. For example, if the integration user does not have visibility to the HCP type *nurse*, a record of that type cannot be included in the suspect match request.

#### *Stewarding suspect match tasks from the API*

Suspect match tasks that are requested from the API look the same as suspect match tasks that are created in the Network UI. Data stewards and data managers will only notice that the **Creator** of the task, in the **Task Details** section, is the customer's integration user.

▼ Task Details

---

**Assignee** beatrix.burns@verteo.com

**Status** 🟡 Pending Review

**Notes** Manually suspected from entity page.

**Date Created** 2018-05-09 09:18:26

**Creator** api.user@verteo.com



### **Batch Create Suspect Match**

The Batch Create Suspect Match API enables users to create multiple suspect matches through the API. It is supported in v15 of the Network API.

This API uses the `POST` HTTP method.

#### **Syntax**

`https://{dns}/api/{version}/entity/createSuspectMatch/batch`

where:

- `{dns}` = The URL for the customer's API service.
- `{version}` = The API version.

#### **Parameters**

None.

#### **POST data**

`vid_key` (required) - The Network entity ID (VID) of the entity to be merged; the losing record.

`matching_vid_key` (required) - The Network entity ID (VID) of the entity to match; the surviving record.

`metadata` (required) - Details about the request.

- `creator` (required) - The name of the user that generated the request.
- `note` (optional) - Extra details about the change request.
- `source` (optional) - Extra information about the source of the change request.

#### **Sample request**

```
POST https://my.veevanetwork.com/api/v15.0/entity/createSuspectMatch/batch
```

#### **Response**

`responseStatus` - The status of the automatic response generated by Network upon receiving the request.

`suspect_matches` - An array of suspect matches that correspond to the same objects in the request. Each suspect match has the following properties:

- `suspect_match_id` - The ID of a created suspect match.



## Sample response

```
{
  "suspect_matches": [{
    "metadata": {
      "note": "Duplicate HCO - Orange to Grey",
      "creator": "API.user@sample.com"
    },
    "vid_key": "Network:Entity:260904728014095360",
    "matching_vid_key": "Network:Entity:615369811198841858"
  }
]
```

## Notes

`responseStatus` returns a failure if any standard errors occur or in the following situations:

- `{vid_key}` does not represent an existing entity.
- The entity represented by `{vid_key}` is not in "VALID" state.
- The type of the entity (for example, HCP) doesn't match with the type of the request (for example, HCO).
- Two third party records are provided in the request.
- One third party and one Veeva OpenData record is provided in the request.
- The integration user does not have visibility to the provided records.

### *Batch Retrieve Suspect Match*

The Batch Retrieve Suspect Match API enables users to obtain information about multiple suspect matches through the API. It is supported in v15 of the Network API.

This API uses the `POST` HTTP method.

## Syntax

`https://{dns}/api/{version}/suspect_match/batch`

where:

- `{dns}` = The URL for customer's API service.
- `{version}` = The API version.

## Parameters

None.



## POST data

`vid_key` (required) - The Network entity ID (VID) of the entity to be merged.

`matching_vid_key` (required) - The Network entity ID (VID) of the entity to match.

`metadata` (required) - Details about the request.

- `creator` (required) - The name of the user that generated the request.
- `note` (optional) - Extra details about the change request.
- `source` (optional) - Extra information about the source of the change request.

## Sample request

```
POST https://my.veevanetwork.com/api/v15.0/suspectmatch/batch
```

## Response

`responseStatus` - The status of the automatic response generated by Network upon receiving the request.

`suspect_matches` - An array of suspect matches that correspond to the same objects in the request. Each suspect match has the following properties:

- `id` - The ID of the retrieved suspect match task.
- `resolution_note` - The notes added for the suspect match task.
- `created_date` - The date the task was created.
- `completed_date` - The date the task was completed.
- `resolution` - The resolution of the task.
- `state` - The state of the task.
- `suspect_match_results` - The result of the suspect match showing the entity that was merged into the surviving entity.
  - `merge_into_vid` - The Network entity ID (VID) of the entity that was merged into the surviving entity.
  - `surviving_entity_vid` - The Network entity ID (VID) of the surviving entity.



### Sample response

```
{
  "responseStatus": "PARTIAL_SUCCESS",
  "errors": [
    {
      "type": "INVALID_DATA",
      "message": "Suspect Match Task 931697085670096927 not found"
    },
    {
      "type": "INVALID_DATA",
      "message": "Suspect Match Task 931697013151105055 not found"
    }
  ],
  "suspect_matches": [
    {
      "id": 932218057214525503,
      "resolution": "NOT_MATCHED",
      "state": "PROCESSED",
      "created_date": "2018-04-10T11:25:43.000-07:00",
      "completed_date": "2018-04-10T11:27:31.000-07:00",
      "suspect_match_results": [
        {
          "merge_into_vid": 847332072463795200,
          "surviving_entity_vid": null
        }
      ]
    }
  ]
}
```

### Notes

`responseStatus` returns a failure if any standard errors occur.