



veeva Network

Veeva Network 23R1.0.1 Release Notes

April 2023



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About these Release Notes

These Release Notes describe all features that are included in Veeva Network 23R1.0.

SUBSCRIBE TO RELEASE NOTIFICATIONS

You can receive email notifications about upcoming software releases and the supporting documentation.

Software releases and maintenance

- [Veeva Trust Site](#)
At the top of the page, click **Subscribe to Veeva Trust Site** and subscribe to the Veeva Network component.

Release Notes and Data Governance documents

The documents are posted in the following locations:

- Veeva Connect - Join the [Network Community](#).
To be notified as soon as the Release Notes are posted, go to your Veeva Connect profile and click **Settings**. On the Email Frequency page, expand the list and choose **Immediate**. Other notification options are **Daily** and **Weekly**.
- Veeva Product Support Portal
Follow the [Network Release Notes](#) section to be notified when release documents are posted.

For more information, see [About Network Releases](#) in the *Veeva Network Online Help*.

Browser requirements

Veeva Network is tested and supported on the latest version of these browsers:

- Google Chrome™
- Apple® Safari®
- Microsoft® Edge

Veeva Network is not supported on mobile devices.

Release Note updates

The following topic was added since the Early Release Notes were published:

- **Veeva OpenData Communications enhancements** - OpenData Communications now include support for additional file types and smart table support for .csv files.

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 23R1.0 major release.

			ST	DS	DM	AD
Hierarchy Explorer widget						
Summary view	A Summary View is added to help Data Managers better understand hierarchies (what data is there, at what level, and in what numbers) in a single view.	23R1.0	●	●	●	●
Network Hashtags						
Hashtags for key networks and IDNs	The #keyNetwork and #IDN are added to help you identify HCOs that are key networks.	23R1.0	●	●	●	●
Profiles						
Profile updates	The Profile page is updated to be faster and more intuitive for Network users.	23R1.0	●	●	●	●
Send to OpenData	Data Stewards can add comments when they send locally managed records to Veeva OpenData as add requests	23R1.0		●	●	
Field version history	Version history for individual fields is available to access from the Profile page.	22R3.1	●	●	●	●
Inbox						
Task notes	Data stewards can create notes on data change requests to provide additional information.	23R1.0		●	●	
Reports						
SQL support	Network Reporting now supports the USING syntax in the FROM clause in SQL queries.	23R1.0	●	●	●	●
Reporting on OpenData - Availability	This feature is now available in all Sandbox and Production instances for NA and EMEA regions.	23R1.0	●	●	●	●
Reporting on OpenData - Flat hierarchies	This feature now provides access to OpenData flat hierarchy tables and includes links to entity profiles in the report results.	22R3.1	●	●	●	●



			ST	DS	DM	AD
File Explorer						
Open compressed files	You can now view the contents of a zip file within File Explorer.	23R1.0	●	●	●	●
Filtering smart tables	Enhancements have been made to column filtering so you can quickly understand the data.	23R1.0	●	●	●	●
Smart table rows	Smart tables display a row count for your file.	23R1.0	●	●	●	●
Smart table logs	Administrators can use the System Audit Log to track when smart tables are opened and downloaded.	23R1.0	●	●	●	●
Data Model						
Key networks field	Use the key_hco_network__v field to identify the top-level HCOs that are considered key networks or IDNs.	23R1.0			●	●
Primary support for sub-objects	The Unique Checkbox primary calculation options are now supported for licenses, parent HCOs, and custom sub-objects.	23R1.0			●	●
Profile layouts	A Hierarchy section is added to the default NASTandard profile layout for HCOs.	23R1.0			●	●
Country support	Data models have been added for several countries in Europe and Africa.	22R3.1			●	●
Data privacy opt out	Veeva OpenData now manages HCP opt outs for the newly supported countries in Europe and Africa.	22R3.1			●	●
Formatted name	A formatted name calculation is added for Vietnam.	22R3.1			●	●
Transformation Queries						
File options	Additional file names and file types are now supported for inbound and outbound queries.	22R3.1			●	●



			ST	DS	DM	AD
Veeva OpenData subscriptions						
Filtering downloaded parent HCOs	Administrators have more flexibility to limit the number of HCOs that are downloaded.	23R1.0			●	●
OpenData Communications enhancements	Communications now include support for additional file types and smart table support for .csv files.	23R1.0			●	●
OpenData Communications	You can receive and manage notifications from OpenData teams within your Network instance.	22R3.1			●	●
Exports to process	Subscriptions now display a count of the files that are pending and that will be processed the next time the subscription runs.	22R3.1			●	●
Merge						
Merge prevention and data partitioning	Administrators can create rules to prevent records from merging.	22R3.1			●	●
Source subscriptions						
Match rule collections	Administrators can configure match rules in a match rule collection and use it in multiple source subscription configurations.	23R1.0			●	●
Integrations						
Integration dashboard	The Integration Dashboard now identifies transformation queries and the Hierarchy Explorer widget on applications.	23R1.0			●	●
Network Bridge license fields	Veeva CRM has added support for importing the additional state license fields that were mapped to the Network Bridge in Network 22R3.0.	22R3.1			●	●
Security						
Single sign-on	The Single Sign-on configuration page is now available by default in Network instances.	22R3.1				●



			ST	DS	DM	AD
Admin settings						
Permission sets	A new permission set, Notes Permission Set (Default), enables Administrators to manage access to notes on record profiles and on data change requests.	23R1.0				●
Amazon S3 support	You can successfully test the connection to write to an Amazon S3 bucket subfolder when Network does not have access to the root bucket.	23R1.0				●
API						
Version update	The Network API is updated to v29.0.	23R1.0		Developers		

Note: The System and Data Admin user has all of the capabilities of the System Administrator and Data Steward users. Features and enhancements that apply to those users also apply to the System and Data Admin user.

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.



Hierarchy Explorer

SUMMARY VIEW

23R1

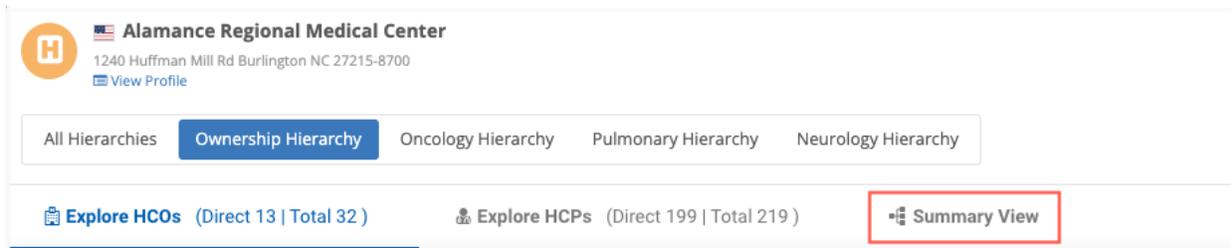
A summary view is added to the Hierarchy Explorer widget. It displays an HCO's hierarchy in a tree view so you can review the entire hierarchy on a single page.

This view can be helpful for understand the different levels of the hierarchy, for preparing for custom hierarchies, and for understanding target counts. You can also use the screenshot tool to snap a picture of the hierarchy so you can share it and use it for presentations.

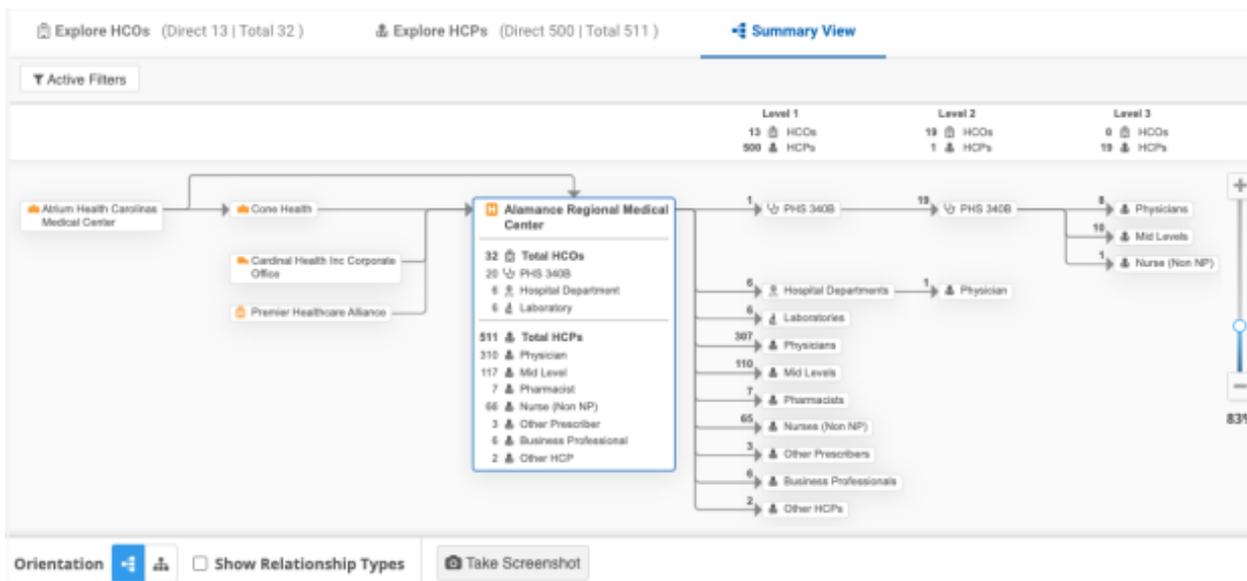
The Summary View is enabled by default in the Hierarchy Explorer.

Access the summary view

Open an HCO and click **Summary View**. The view is supported for the default, All Hierarchies view, or you can review the HCO in the context of any custom hierarchy.



When the summary view opens, all levels of hierarchy for the root HCO display in a tree view.





Tools

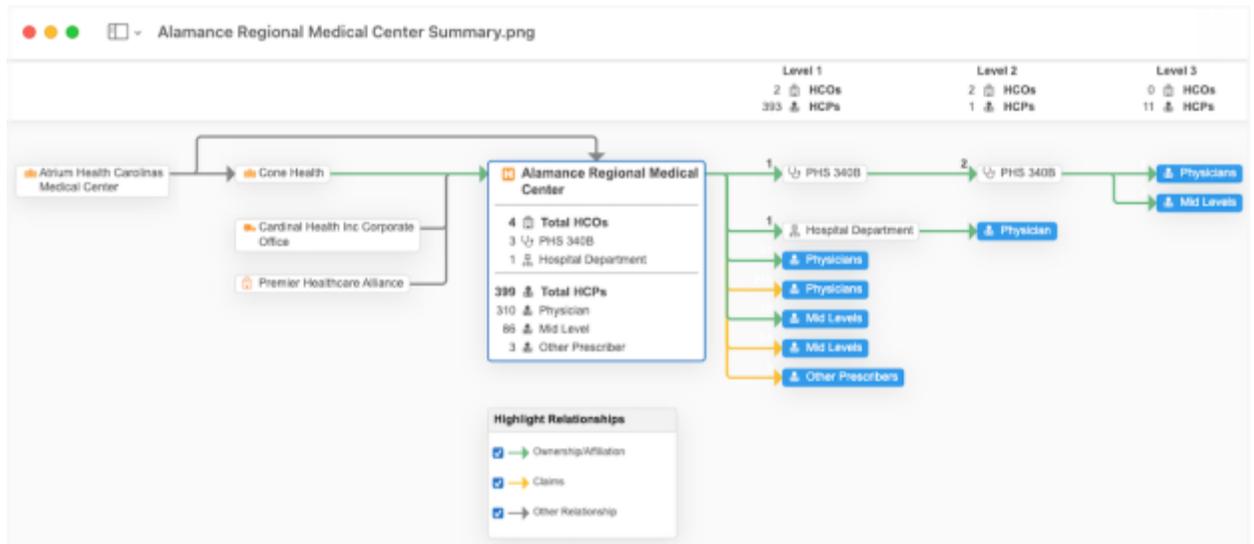
The following tools are available to help you to customize and navigate the Summary View canvas:

- **Orientation** - By default, the summary view displays as a vertical tree view. Use the **Orientation** icons to toggle the summary view from a vertical tree view to a horizontal tree view.
- **Show Relationship Types** - Highlight relationship types on the graph (supported for US data only).
- **Pan and zoom** - Use the zoom tool to increase or decrease the size of the graph. To pan, drag the canvas with your mouse cursor.
- **Take Screenshot** - Click this button to take a screenshot of the graph. A .png file is saved to your local computer with the following file naming convention: <Root HCO name> Summary .png.

When the screenshot is taken, it considers the following:

- Orientation - The screenshot will display the graph in the current orientation.
- Active filters - Records that match the filters are highlighted in blue.
- Relationship types - When relationships types are filtered out, those relationships will be dimmed.

Example screenshot





Hierarchy counts

The box containing the root HCO displays the total count of HCOs and HCPs in the HCO's hierarchy. Below the total count is a breakdown count for each HCP and HCO type.

Alamance Regional Medical Center

32 Total HCOs

- 20 PHS 340B
- 6 Hospital Department
- 6 Laboratory

511 Total HCPs

- 310 Physician
- 117 Mid Level
- 7 Pharmacist
- 66 Nurse (Non NP)
- 3 Other Prescriber
- 6 Business Professional
- 2 Other HCP

If the summary view is using a custom hierarchy, the counts reflect only the records that apply to the custom hierarchy.

HCP and HCO groupings

HCPs and HCOs are grouped so it is easy to understand the types of HCPs and HCOs in the hierarchy. Not all HCO and HCP types are listed. The types are categorized into specific groups.

HCO Groupings

- ACOs
- Admin Only Locations
- Dentistry Groups
- Distributors
- Extended Care Facilities
- Government Agencies
- Group Practices
- Health Systems
- Hospitals
- Hospital Departments
- Infusion Centers
- Institutions
- Laboratories
- Pharmacies
- PHS 340B

HCP Groupings

- Business Professionals
- Doctors
- Mid Levels
- Nurses
- Nurses (Non NP)
- Other HCPs
- Other Prescribers
- Pharmacists
- Physicians
- Student/Resident

The groups are mapped to specific HCO/HCP types. The HCP group mappings also consider the Medical Degree field and can be country-specific.

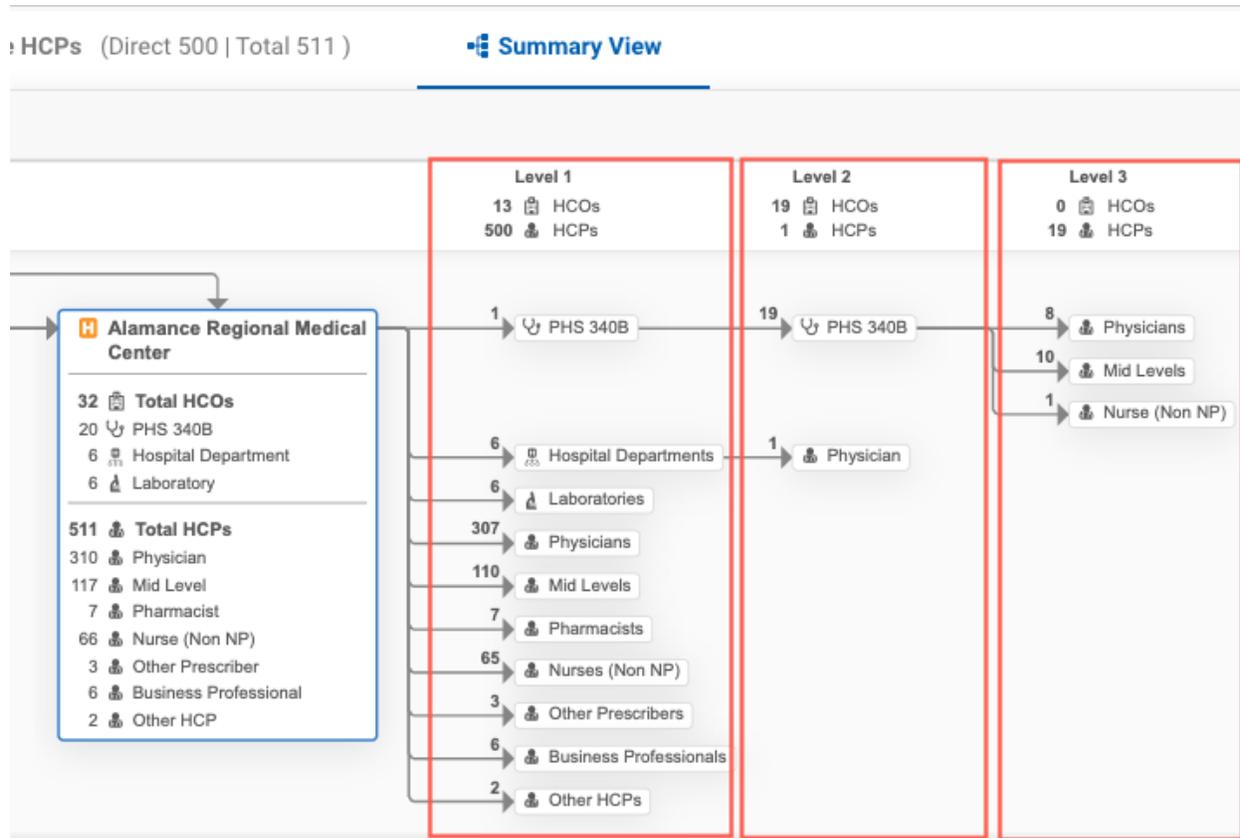
The HCO and HCP group mappings are available in the [Summary View](#) topic in the *Veeva Network Online Help*.



Level counts

A summary of the HCO's hierarchy levels display on the top bar (or the sidebar if the orientation is set to the horizontal tree view).

Each level provides counts for the HCPs and HCOs in the root HCO's hierarchy. The counts are aligned to the HCP and HCO group counts in the graph and reflect any active filters or custom hierarchy that is applied to the hierarchy.



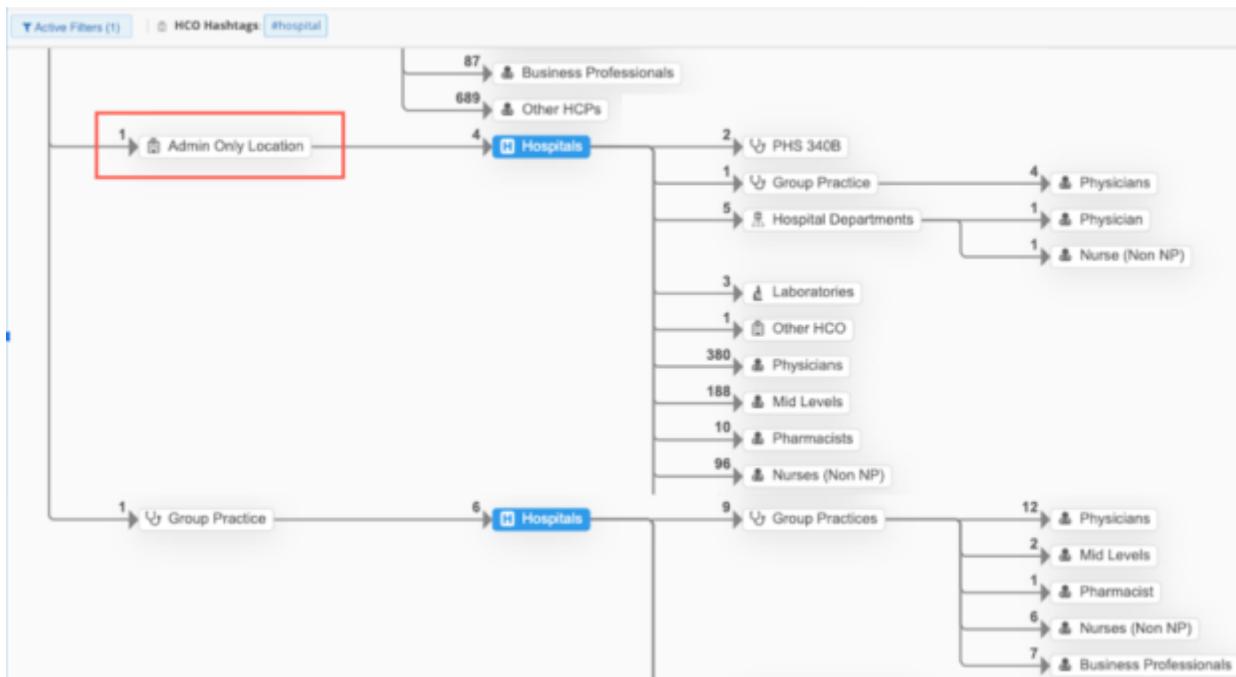
Include subsidiary HCOs

Only records that meet any applied filters and custom hierarchy display in the summary view and are considered in the count. However, subsidiary HCOs (HCOs that are between the root HCO and the filtered HCOs) are contained in the count.

Example

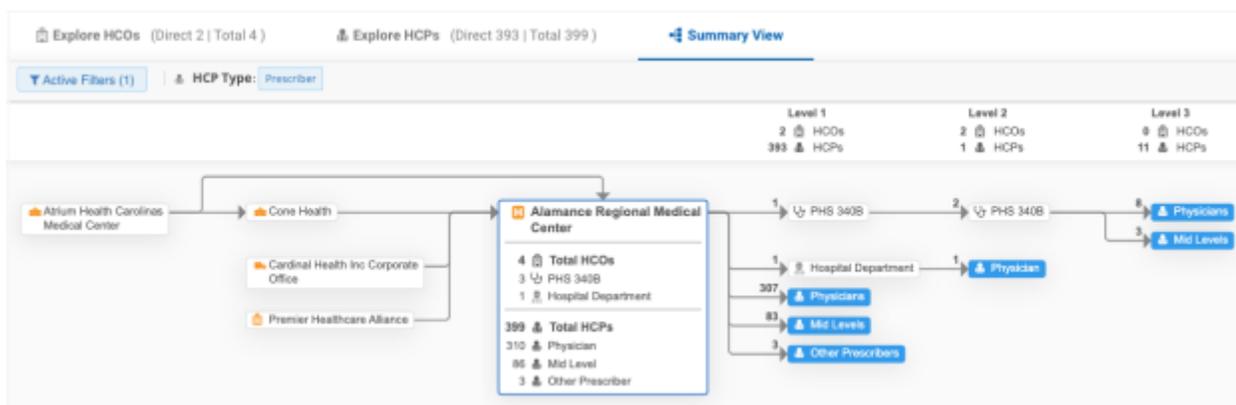
Filter a hierarchy using the #hospital hashtag. Hospitals are highlighted.

In this case, there is an Admin Only Location that is a parent of the hospital. The Admin Only Location is a subsidiary HCO, but it is counted to ensure you can view the entire path of the hierarchy in the summary view.



Filter the graph

You can apply filters to HCOs and HCPs so you can view relevant records in the hierarchy. When filters are applied, the graph refreshes and records that match the filters are highlighted in blue. Records that do not match the filter are removed. The counts also update to reflect the filtered records.



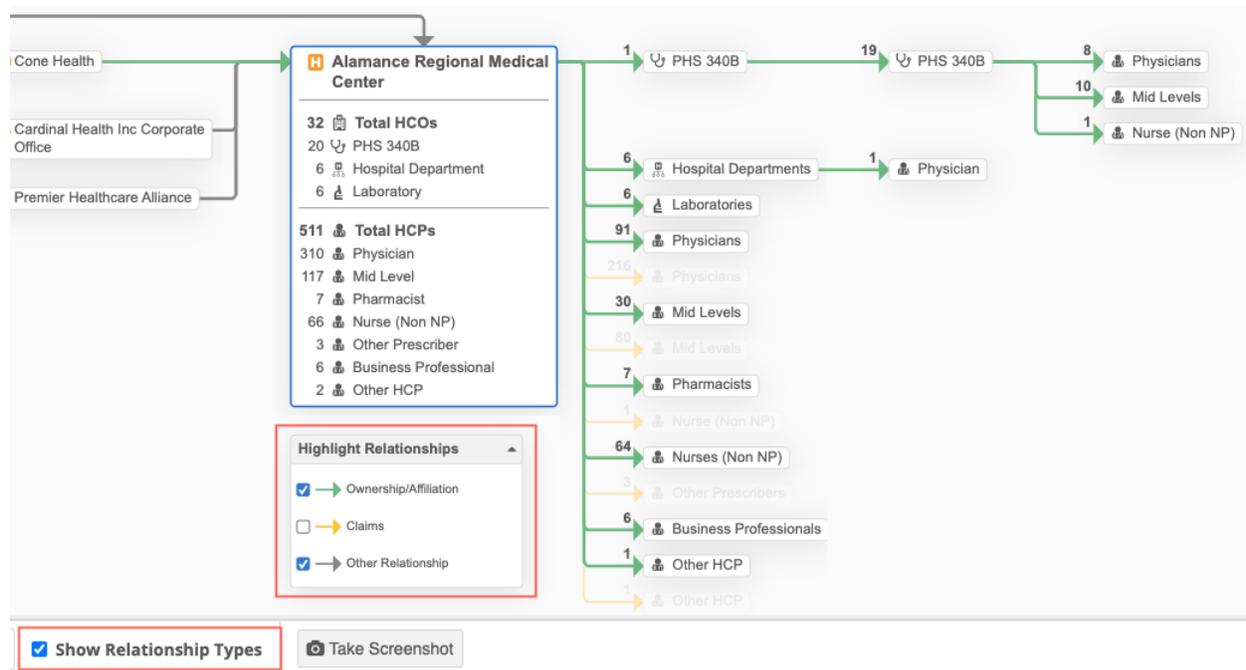


Show relationship types

Use the **Show Relationship Types** option to view the relationship details for the hierarchy.

Note: This is supported for US data only.

When the option is applied, the connecting lines on the graph are highlighted to identify the relationship types. A legend, **Highlight Relationships**, displays to map the line color to the relationship type.



By default, all of the applicable relationship types display.

To focus on specific relationship types, clear the checkbox beside relationship types that you do not need to view. This will dim the related records and connecting lines on the graph.

Supported relationship types

- Ownership/Affiliation
- Kaiser
- Business Partner
- Claims
- Joint Venture
- Other Relationships

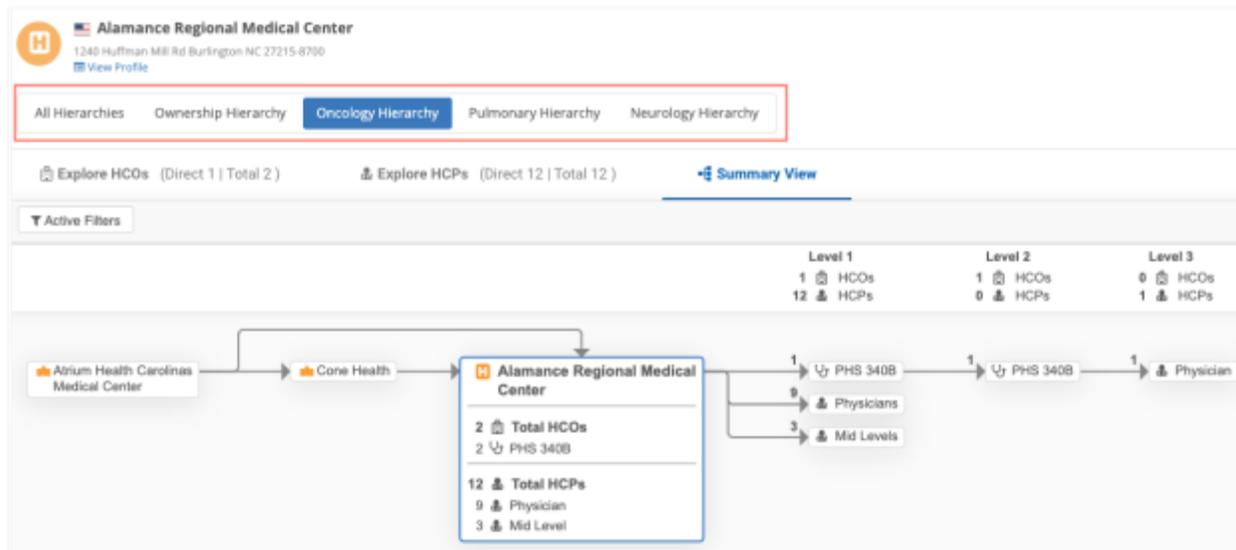
Highlight Relationships

- Ownership/Affiliation
- Joint Venture
- Business Partner
- Claims
- Kaiser
- Other Relationship



Toggle between custom hierarchies

You can toggle between any of the custom hierarchies available to understand the structure of the custom hierarchy. When you change the hierarchy, the graph updates to display only the accounts that are part of the custom hierarchy.



Network hashtags

HASHTAGS FOR KEY NETWORKS

23R1

Two new hashtags are available to help you find HCOs that are key networks.

Hashtag	Countries	Tooltip
#keyNetwork	Andorra, Australia, Belgium, Brazil, Canada, China, Czech Republic, France, Germany, Ireland, Italy, Luxembourg, Mexico, Monaco, Netherlands, New Zealand, Norway, Poland, Portugal, Russia, Spain, Switzerland, United Kingdom	HCO is a Key Network.
#IDN	United States	HCO is an IDN (Integrated Delivery Network).

These hashtags are enabled by default in your Network instance.



Profiles

The following enhancements have been made to the Profile page in this release.

PROFILE PAGE UPDATES

23R1

The Profile page is updated to improve performance and to help Data Stewards more efficiently process records.

These enhancements are enabled in your Network instance by default.

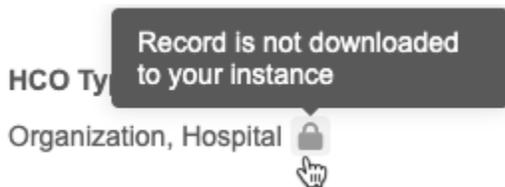
Read-only mode

When you open a record, it now displays in read-only mode. This helps the page to load more quickly. In this mode, Data Stewards can easily copy field values without accidentally changing the value.

Read-only fields

The **Lock**  icon displays beside field values that cannot be changed. Typically, fields that cannot be edited are system fields, fields that can only be updated by Veeva OpenData, or fields that have been restricted through Field Restrictions.

Hover over the **Lock** icon to see a tooltip explaining why the field is read-only.



Edit fields

To quickly toggle the page to Edit mode, hover over any field value and click the **Edit**  button.



This changes the Profile page to Edit mode.

You can also use the new **Edit Profile** button at the top of the page to put the page in Edit mode.



Sutter Santa Rosa Regional Hospital ☆

#hospital

FULL ADDRESS 30 Mark West Springs Rd Santa Rosa CA
Organization, CMS Teaching Hospital, Multi Specialty Practice

View CRM Activity | Notes | **Edit Profile**

No value
No value

Primary Information

Corporate Name ⓘ	Sutter Santa Rosa Regional Hospital	Veeva ID ⓘ	937932943267792489 🔒
Primary Country ⓘ	United States 🔒	HCO Type ⓘ	Organization, CMS Teaching Hospital
Major Class of Trade ⓘ	Hospitals	AMA Do Not Contact? ⓘ	No/False
Status ⓘ	Active	Record State ⓘ	Valid 🔒

HIERARCHY

- California Pacific Medical Center Pacific Campus
- Sutter Health
- Sutter Hosp

Open in Network Explorer

The **Edit Profile** button does not display for the following reasons:

- The record has not been downloaded from Veeva OpenData.
- The record state is not valid (the record state is DELETED, INVALID, MERGED_INTO, or MERGE_INACTIVATED).
- The HCP record has been opted out by OpenData.
- You are viewing the record in Profile Preview.
- The record is being added (Add Record).

The **Edit Profile** button is dimmed for the following reasons:

- The record has been sent to OpenData to manage.
- You have read-only access to data.

If you do not have access to edit data through your data visibility profile, the **Edit Profile** button is dimmed and the **Lock** icon displays beside all fields.

Sutter Santa Rosa Regional Hospital ☆

#hospital

FULL ADDRESS 30 Mark West Springs Rd Santa Rosa CA
Multi Specialty Practice, Organization, CMS Teaching Hospital

View CRM Activity | Notes | **Edit Profile** 🔒

You don't have permission to edit this profile.

Primary Information

Corporate Name ⓘ	Sutter Santa Rosa Regional Hospital 🔒	Primary Site Designation ⓘ	No Value 🔒
Veeva ID ⓘ	937932943267792489 🔒	HCO Type ⓘ	Organization, CMS Teaching Hospital 🔒
Status ⓘ	Active 🔒	NPI ⓘ	No Value 🔒

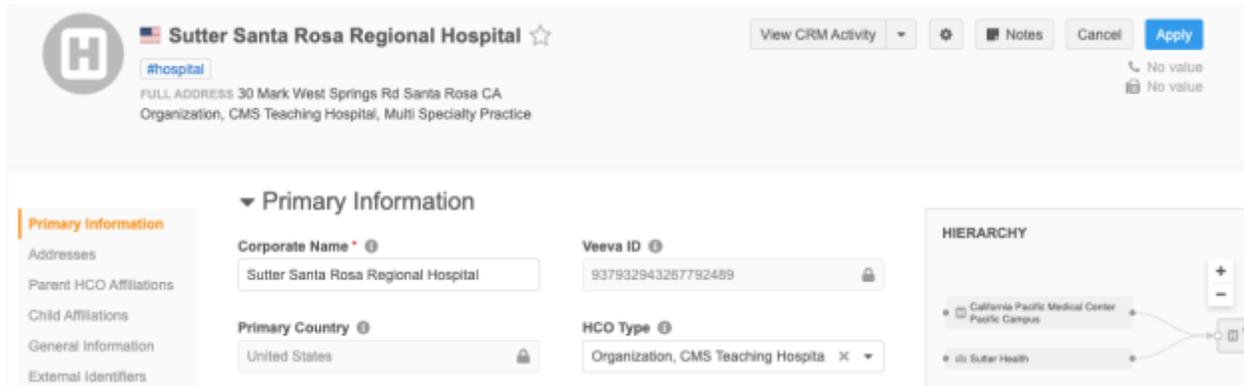
HIERARCHY

- California Pacific Medical Center Pacific Campus
- Sutter Health
- Sutter Hosp



Edit mode

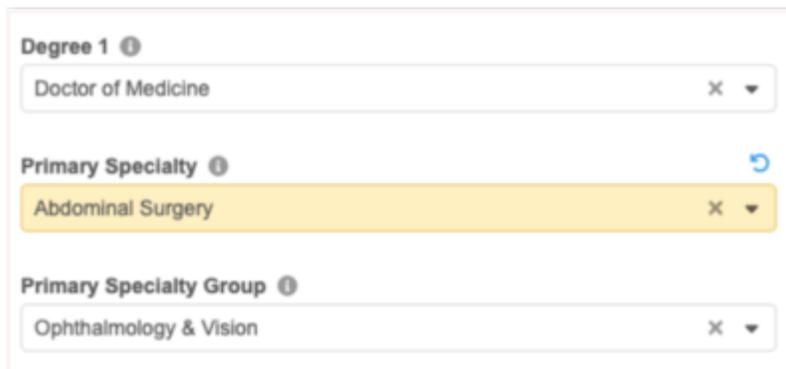
When the Profile page changes to edit mode, you can easily identify the fields that can be edited. The fields that are read-only are dimmed and display the **Lock** icon.



Make any changes and click **Apply**.

Updated fields

After a field is changed, it is highlighted. Click the **Undo** icon above the field if you need to revert the change.



Reference value fields

For fields where multiple values can be selected, the list now contains a checkbox beside each reference value. When you select a value, the list remains open. Previously, the list closed each time a value was selected.

For some fields, a maximum number of reference values can be selected; for example, nine values can be selected for the Other Specialties field. When the limit is reached, the remaining values in the list are dimmed and cannot be selected.



Other Specialties ⓘ

Urgent Care Medicine × Emergency Medicine ×
General Practice × Family Medicine (Formerly FP) ×
Abdominal Radiology × Abdominal Surgery × ▲
Acupuncture × Acute Care ×
Acute Care Pediatrics (APNs only) ×

🔍 Search...

- Abdominal Radiology
- Abdominal Surgery
- Acupuncture
- Acute Care
- Acute Care Pediatrics (APNs only)
- Addiction Medicine
- Addiction Psychiatry
- Addiction Psychology & Counseling
- Administrative Medicine
- Adolescent Medicine (Family Medicine)

Date fields

The calendar that displays when you add a date to a date field is updated. It now displays above the field and it is larger so it is easier to navigate.

< March 2023 >

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

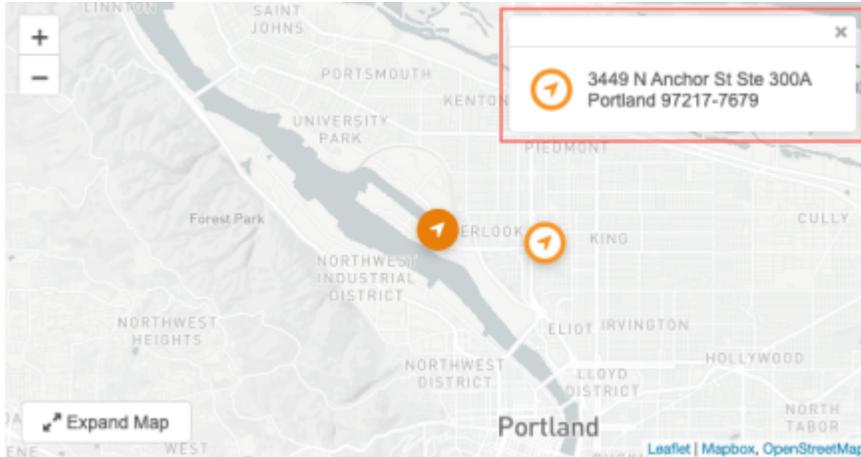
Today

YYYY-MM-DD 📅



Map addresses

The address now always displays in the top right corner when you select a pin on the map. Click the **x** icon to close the address. This helps Data Stewards when they are reviewing addresses that are in close proximity. Previously, the address displayed below the pin which could cover other pins on the map.

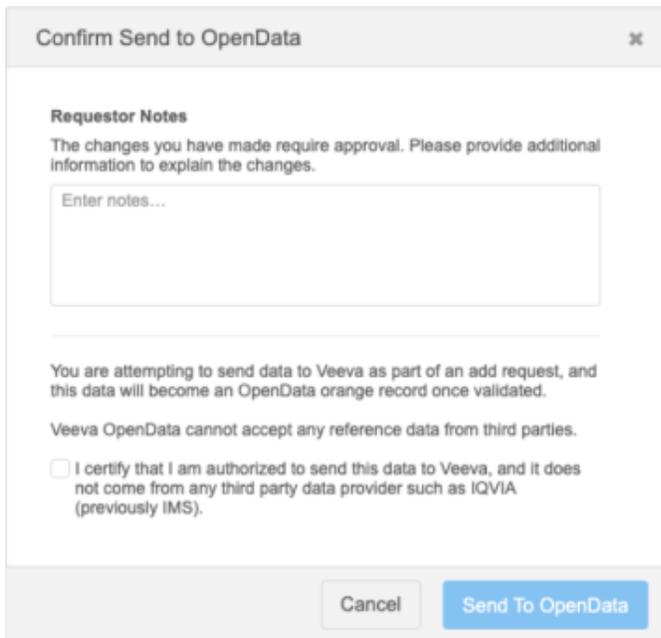


SEND TO OPENDATA

23R1

Data Stewards can now add comments when they send locally managed records to Veeva OpenData as add requests.

When Data Stewards click the **Send to OpenData** button on the Profile page, the **Confirm Send to OpenData** pop-up contains a **Requester Notes** section. Use this section to provide some context about the record or the reason for sending the add request. This helps the OpenData team to verify the add request. The **Requester Notes** field is not required.



This enhancement is enabled by default in your Network instance.



FIELD VERSION HISTORY

22R3.1

You can now quickly access the history of changes for a specific field on the Profile page.

An **Info** icon displays beside each field on the Profile page. All users can use the icon to open a pane that contains the **Version History** for the field. The **Version History** tab identifies the change and the job or data change request that made the change.

Primary Specialty
✕

Help

Version History

▼

Version 12.0 [↗](#)

Internal Medicine

Time	2022-04-27 19:21:05 IST
Action	Update from OpenData
Job ID	6412 ↗
Subscription	dfb_import__v ↗

▼

Version 10.0 [↗](#)

Acute Care

Time	2022-04-27 19:21:05 IST
Action	Update from Change Request
DCR ID	940587205744921759 ↗
Approver	pm.datamanager@veeva.net work.com

▶

Version 7.0 [↗](#)

Reproductive Endocrinology and Infertility/Medical Genetics and Genomics

▶

Version 1.0 [↗](#)

Acute Care

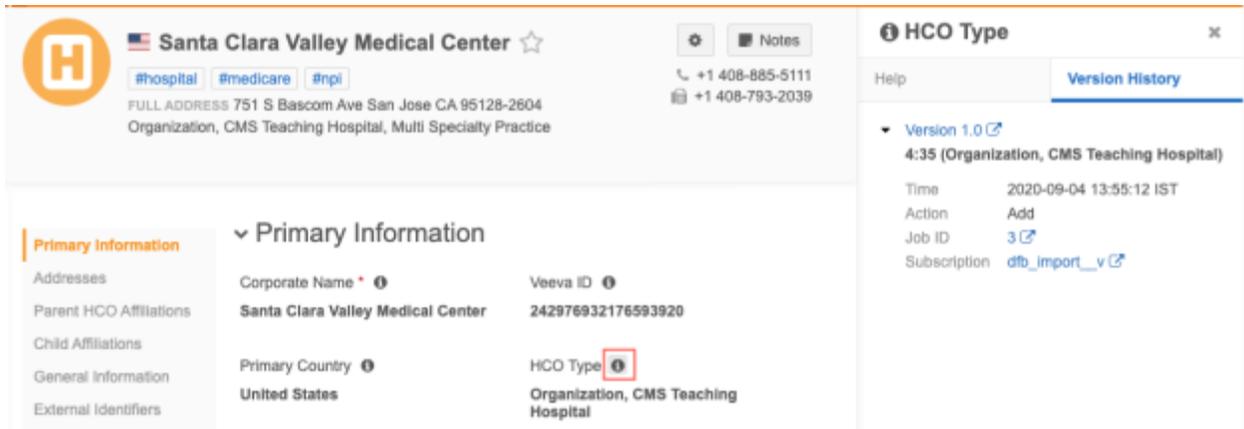
[↗ Expand All](#)

The **Version History** information is enabled by default in your Network instance.



View field history

To access a field's version history, click the **Info**  icon beside the field on the Profile page.



The screenshot shows the profile page for Santa Clara Valley Medical Center. The 'HCO Type' field is highlighted with a red box and an info icon. A 'Field' pane is open on the right, showing the 'Version History' tab with details for Version 1.0.

Field	Value
Corporate Name	Santa Clara Valley Medical Center
Veeva ID	242976932176593920
Primary Country	United States
HCO Type	Organization, CMS Teaching Hospital

Field History:

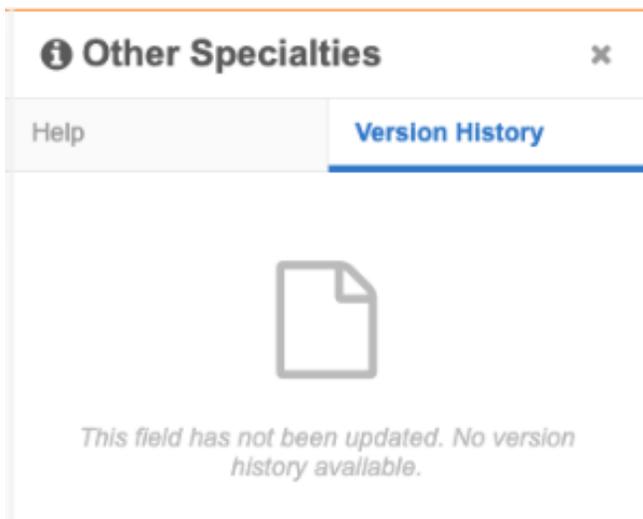
Version	Time	Action	Job ID	Subscription
Version 1.0	2020-09-04 13:55:12 IST	Add	3	dfb_import_v

The **Field** pane displays on the right side of the Profile page.

If you have access to field help, the **Help** tab displays by default. Otherwise, only the **Version History** tab displays.

Note: The **Help** tab is available only to users that have access to it through permission sets. Administrators must create permission sets and provide access to users. For more information, see [Field Help](#) in the *Veeva Network Online Help*.

If the field has no value, a message displays: This field has not been updated. No version history available.



The screenshot shows the 'Other Specialties' field pane. The 'Version History' tab is selected, and a message displays: "This field has not been updated. No version history available."



View version history details

Expand the version to view the details of the change.

The version information contains the following details:

- **Version** - The version number. Click the version link or the **Go To**  icon to open the full Revision History page in a new browser tab.
- **Date and time** - The time that the change occurred.
- **Action** - The method that made the change; either an add request, change request, or a job (for example, a source subscription or an update from OpenData).
- **ID** - The change request ID or Job ID. Click the **Go To**  icon to open the Job Details page or change request in a new browser tab.
- **Subscription** - The subscription name. Click the **Go To**  icon to open the subscription configuration in a new browser page.

Grouped fields

The version history for field sets (for example, Specialty, Email, Medical Degree, and so on) display the fields in numerical order so you can easily identify what changed in each version. Only the fields that changed within that version are listed.

Other Specialties	
Version History	
▶ Version 16.0 	
Specialty 2	ADP (Addiction Psychiatry)
Specialty 3	ADM (Addiction Medicine)
▶ Version 15.0 	
Specialty 2	ADM (Addiction Medicine)
Specialty 3	AMD (Administrative Medicine)
Specialty 4	PSU (Addiction Psychology & Counseling)
Specialty 5	CHD (Adult Congenital Heart Disease (IM))
▶ Version 13.0 	
Specialty 2	ACP (Acute Care Pediatrics (APNs only))
Specialty 3	ADM (Addiction Medicine)
Specialty 4	AMD (Administrative Medicine)

Localization

The **Help** and **Version History** tabs on the **Field** panel is now translated into the language you have specified in your Network profile.



Inbox

TASK NOTES

23R1

Data Stewards can now leave notes on data change requests. The **Notes** pane displays on inbox tasks so Data Stewards can add relevant information about the request. Previously, details could be added in the **Comments** section in the **Summary** pane, but those comments cannot be edited. Data Stewards can view, add, edit, and delete notes while they are processing tasks.

A default permission set has been created so Administrators can provide specific access to notes to users or user groups in the Network instance.

This feature is enabled by default in your Network instance.

View notes

The **Notes** tab is available on add requests and change requests. The **Summary** tab displays by default. Click **Notes** to open the tab.

If notes have been added to a task, a count of the notes displays beside the label.

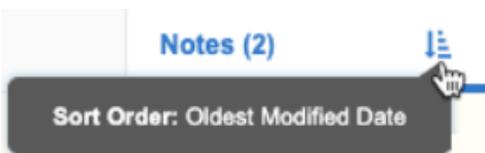
The screenshot displays the 'Change Request' interface for 'Flora Wan'. The main content area shows a table with columns: Field, Current Value, Change Request, and Approved?. Under the 'Addresses' section, the address '222 FRONT ST NEW YORK 11231' is listed. A message states: 'You must augment an affiliation for this address before you can link to a parent address.' The table rows include 'Address Verification Status' (Unverified), 'Address Type' (Professional), 'Address Line 1' (222 Front St), 'Address Line 2' (No Value), and 'Address Line 3' (No Value). The right-hand pane shows the 'Notes (2)' tab with two pinned notes: 'Important call info' (last updated 2023-03-13) and 'Address verification' (last updated 2023-03-13). A '+ Add Note' button is visible at the bottom of the notes pane.



Sort notes

By default, notes display in descending order by newest modified date.

To sort the notes by oldest modified date, click the **Sort**  icon in the header. The icon changes and a tooltip displays the sort order.



Pinned notes always remain at the top of the **Notes** pane.

Create notes

Notes are also available on record profiles. Notes on inbox tasks are created in the same way.

To create a note:

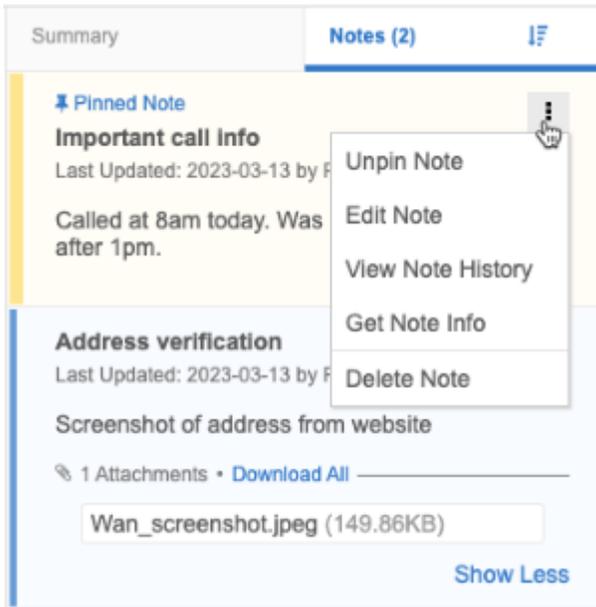
1. On a data change request, click the **Notes** tab.
 - If a record has no existing notes, click the **Add new note** link.
 - If there are existing notes, click the **Add Note** button
2. In the text box, type a title and the message.

3. (Optional) Customize your note.
 - **Format the text** - Use bold, italics, or underline formatting. You can also change the color of the text and add a bullet or numbered list.
 - **Add attachments** - Add images to your message.
Support for attachments:
 - **Attachment type** - Image files are supported (.jpg, .jpeg, and .png).
 - **Maximum number** - Each note can contain a maximum of 10 attachments.
 - **File size** - Each attachment can be a maximum file size of 5MB.
 - **Insert hyperlinks** - Include links to relevant websites.
 - **Change the note color** - Customize the background color of your note. The default color is blue.



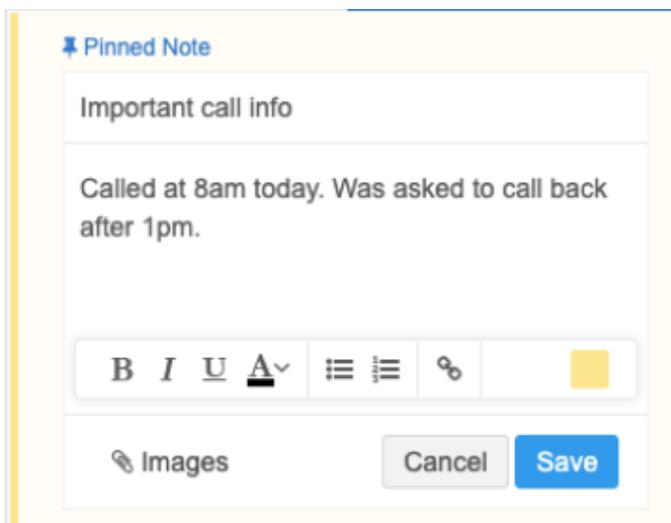
Note options

After a note is created, an **Option** menu displays. Click the menu to view the available actions.



- **Pin/Unpin Note** - Pin a note so it displays at the top of the **Notes** tab. By default, notes display by created/modified date. When you pin a note, that note displays above all of the sorted notes. Newest pinned notes display first. Any note can be pinned.
- **Edit Note** - Click to put the note in edit mode.

You can edit the title and message, add and delete attachments (Images) and change the text formatting. You can also add hyperlinks and change the note background color.



Note: Administrators can disable the ability to use attachments (**Settings > General Settings > Enable Attachment for Notes**). This setting impacts notes on the Profile page and on data change requests.



- **View Note History** - This option displays a snapshot of the note contents for each version. The version changes after existing content is changed and saved.

Note History: Important call info		
VERSION	TIMESTAMP	USER
3	2023-03-13 15:48:31 GMT	PM Data (pm.data@verteo.com)
2	2023-03-13 15:48:27 GMT	PM Data (pm.data@verteo.com)
1	2023-03-13 15:48:08 GMT	PM Data (pm.data@verteo.com)

FIELD	VERSION 2	VERSION 3
Note Color		
Pinned Note	False	True
Note Title	Important call info	Important call info
Note Content	Called at 8am today. Was asked to call back after 1pm.	Called at 8am today. Was asked to call back after 1pm.
Attachments		

The **Note History** can include the following details:

- Created date and time and user (Version 1)
- Modified date and time and user (Version 2 and greater)
- Changes to background color, pin state, title, content, and attachments.

Tip: You can use the details in the **Note History** to run queries on the Notes Revision History table in the SQL Query Editor to report on all changes made to a note. For more information, see the *Reporting on task notes* section below.

- **Get Note Info** - All notes contain details about the user that created it, when it was created, and when it was last notified. Each note also has an ID. You can use this information in a query to run reports on notes.
- **Delete Note** - Delete any note that you have created or that was created by another use.

The note is permanently removed but its revision history is available in reporting. You can run a report to get deleted notes content and revision history.



Access to notes

By default, all users (except Standard users and Integration users) can view, create, edit, and delete inbox task notes.

A permission set, `Notes Permission Set (Default)`, is added in this release so Administrators can provide or restrict access to notes on record profiles and on inbox tasks.

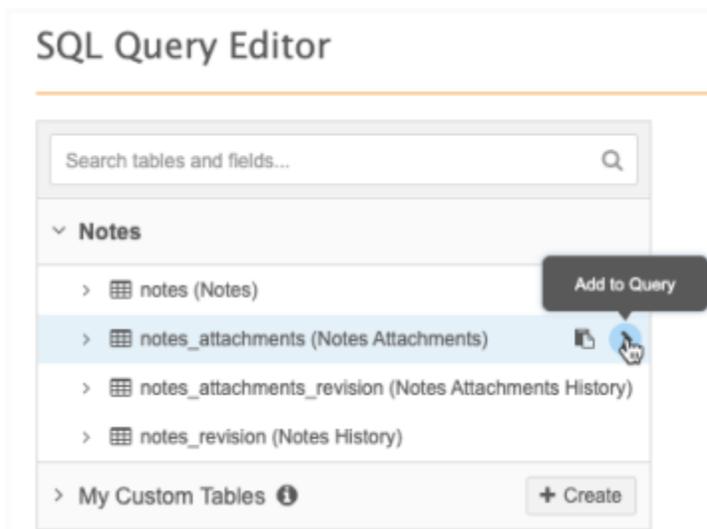
For more information, see the "Permission sets" topic in these *Release Notes*.

Reporting on task notes

When the Profile Notes feature was released, it included reporting tables so you can run SQL queries on notes. Task notes are also available through these tables.

To run queries:

1. In the SQL Query Editor, expand the **Notes** section. The tables and fields that are available for reporting are listed.
2. Hover over the table or field names to insert or copy them into your query.





Report results

To support task notes, a **Note Type** column is added to identify the note as a **Profile** note or **Task** note. Also, the **Entity ID** column is renamed to **Owner ID** because it now reflects tasks as well as objects.

NOTE ID	OWNER ID	TITLE	NOTE TYPE	COMMENT	RECORD VERSION	COLOR	IS PINNED?
942200991706451103	940179477211448927	Mat leave	PROFILE	<p>Confirmed maternity leave until 4/01/23</p>	1.0	#679AD5	
942200021741800607	941702964100204127	Call times	PROFILE	<p>Call only from 2-4pm PST</p>	1.0	#679AD5	
942377961177877663	940580234615262367	Important call info	TASK	<p>called at 8am asked to call back at 4</p>	3.0	#FDE590	False
942398099116264607	940580234615262367	Evidence	TASK	<p>screenshot from validation</p>	1.0	#8DCC9F	

Reports

SQL SUPPORT

23R1

Network reporting now supports the USING syntax in the FROM clause in SQL queries.

Syntax example

```
table1 INNER JOIN table2 [ ON table1_column = table2_column | USING
(join_column [, ...] ) ]
```

This enhancement is enabled by default in your Network instance.

Supported SQL commands

The USING syntax can be used only when the join_column from the two tables are identical.

It is supported in the following commands:

- INNER JOIN (or just JOIN)
- LEFT (OUTER) JOIN
- RIGHT (OUTER) JOIN



Example

The USING syntax can make a query more readable for users.

Previous query

```
select hcp_revision.vid__v
  from hcp_revision
  join revision on hcp_revision.revision_id = revision.revision_id
```

New query using the USING syntax

```
select hcp_revision.vid__v
  from hcp_revision
  join revision using (revision_id)
```

REPORTING ON OPENDATA

Availability

23R1

This feature will be available in all customer Sandbox and Production instances for the NA and EMEA OpenData regions. You can access OpenData entity tables for a country if you subscribe to all records for an OpenData country.

Flat hierarchy tables

22R3.1

The Reporting on OpenData feature was introduced in Network version 22R3.0 to allow advanced reporting users to report on country data within OpenData instances. In this release, the following enhancements are available:

- Entity links in results
- Access to OpenData flat hierarchy tables

Note: This feature is not enabled by default; it is being deployed to Network instances in stages. After the feature is deployed to the NA and EMEA regions in Network 23R1.0, it will be deployed to the LatAm and APAC regions.

For more information about the feature, see [Reporting on OpenData](#) in the *Veeva Network Online Help*.

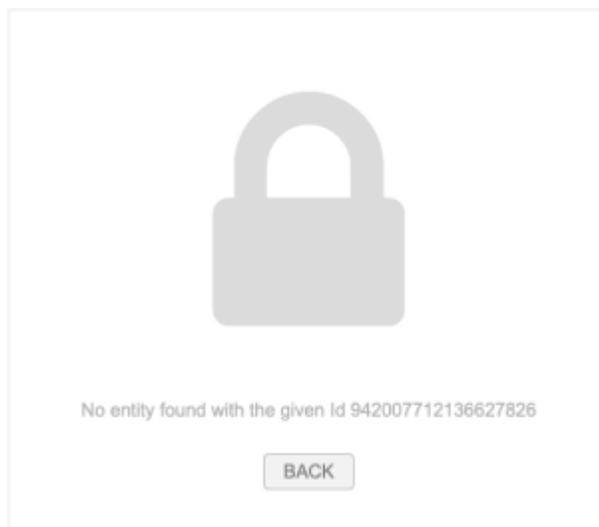


Entity links in results

The report results now include a link to the entity's Profile page. If the entity has been downloaded to your Network instance, the Profile page opens when you click the link.

Report Results (10 records)	
942007712136300129	Hematology/Oncology
942007712136300134	Hematology (Internal Medicine)
942007712136300136	Hematology (Internal Medicine)
942007712136300137	Internal Medicine
942007712136300140	Diagnostic Radiology

If the entity has not been downloaded to your Network instance, an error displays when you click the link.



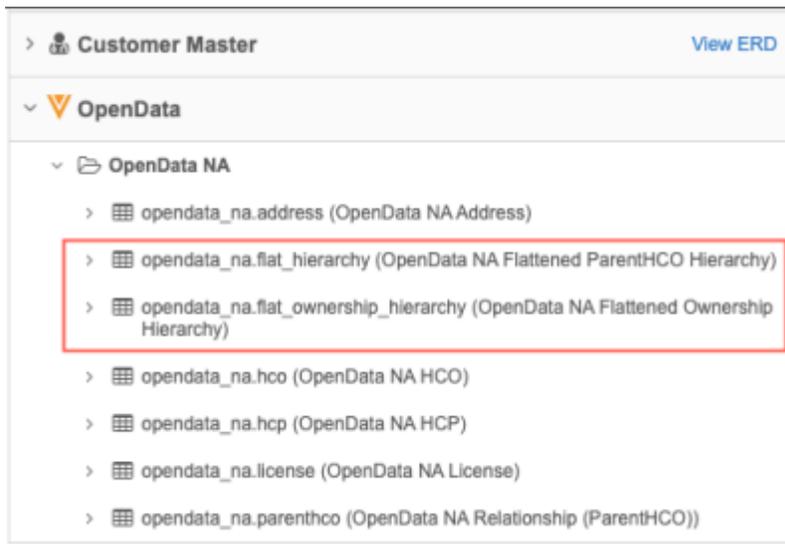
Access to OpenData flat hierarchy tables

You can now access a flat hierarchy table for OpenData instances that you have access to through this feature. Flat hierarchy tables display all of the relationships and levels in hierarchies so you can see how HCPs and HCOs rollup to HCOs.

To access the table, expand the **OpenData** category in the SQL Query editor and expand the OpenData instance folder; for example, **OpenData NA**. The table has the following naming convention: `<OpenData_instance>.flat_hierarchy`; for example, `opendata_na.flat_hierarchy`.



Example flat hierarchy table



All OpenData regions (APAC, China, EMEA, LatAm, and NA) have their own `flat_hierarchy` table. The OpenData NA region has a second table called `opendata_na.flat_ownership_hierarchy`, which contains US records only.

Table updates

Flat hierarchy tables are updated daily. The tables are read-only; OpenData teams cannot edit or change the contents of the tables. This ensures that you will always have access to the full ownership hierarchy for each OpenData region.

More information

For information and examples for using the flat hierarchy tables, see [Reporting on hierarchies](#) in the *Veeva Network Online Help*.



File Explorer

The following enhancements have been made to File Explorer in this release.

OPEN COMPRESSED FILES

23R1

You can now view the contents of compressed files within File Explorer. Previously, compressed files had to be downloaded to view the contents. Now, double-clicking on a compressed file opens a temporary folder containing the contents of the file. This is helpful when you want to view the .csv files that are contained in .zip files as smart tables within File Explorer.

This enhancement is enabled by default in your Network instance.

Supported compressed file formats

The following file types can be opened in File Explorer:

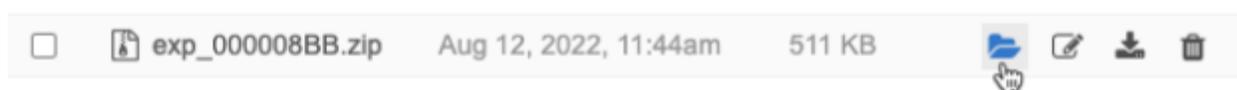
- .zip files
- .tgz
- .tar.gz

Note: Encrypted archives are not supported.

Unzipping files

To open a compressed file:

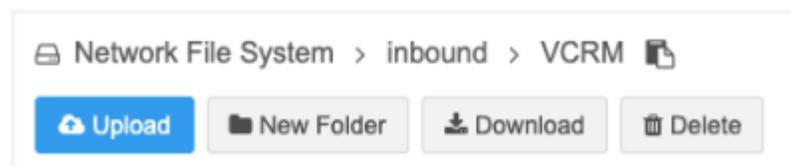
- Double-click the file
- or
- Hover over the file and click the **Folder** icon.



When you open a compressed file in File Explorer, a temporary folder is created. The folder is not saved to the FTP directory.

Because the folder is temporary, the actions (**Upload**, **New Folder**, **Download**, **Delete**) that usually display under the folder breadcrumb in File Explorer are not available for these folders. Also, the **Copy Path** icon does not display beside the breadcrumb.

Typical Folder





Uncompressed file folder

NAME	LAST MODIFIED	FILE SIZE
account_link.csv	Jan 9, 2023, 10:59am	37 KB
hcp.csv	Jan 9, 2023, 10:59am	58 KB
parenthco.csv	Jan 9, 2023, 10:59am	200 KB

The folder can be sorted by the **Name**, **Last Modified**, and **File Size** columns. A limit of 1000 items display in the folder.

Note: For files, the **Last Modified** time identifies the time the file was uncompressed.

Options for files

The following actions are available for folders and files within the unzipped folder:

Folders

- Open to view contents

CSV files

- Open as smart table
- Download

NAME	LAST MODIFIED	FILE SIZE
exp_00000FE3	—	—
HCP_stewarding_fields.pptx	Jan 11, 2023, 11:27am	6 MB
HCP_Report_2022-09-01-22-22-20.xlsx	Jan 11, 2023, 11:27am	68 KB
hcp.csv	Jan 11, 2023, 11:27am	451 B
HCP_example_profile.png	Jan 11, 2023, 11:27am	44 KB

Other file types

- Download

Note: Other compressed files are not supported. If there is a nested compressed file in the unzipped folder, it cannot be opened.

Audit

Administrators can use the System Audit Log to view the files that have been unzipped by users.



FILTERING SMART TABLES

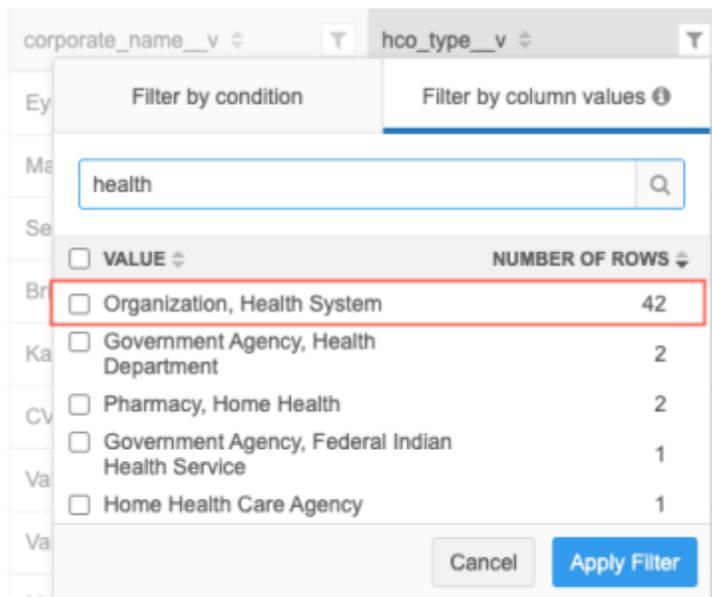
Filtering options have been added to smart tables to help you quickly understand the data.

Previously, a column could be filtered by searching for a specific value. Now, you can filter columns using the following tabs:

- **Filter by condition** - Define the text to include or exclude in the filtered smart table.
- **Filter by column values** - Displays all of the values in the column and a count for the number of rows that the value.

Example

Use this option to easily see how many rows in the HCO Type column are health systems.



This enhancement is enabled by default in your Network instance.

Note: Backslash (\) characters are not supported in defined filters.

Filter by condition

The **Filter by condition** tab displays by default.

Use the dropdown list to choose the **Text includes** or **Text excludes** option and then type the text that you want to filter on. Click **Apply Filter** to view the updated smart table.

Example

Filter the smart table to see only the rows that include *sutter* in a `corporate_name__v` column.



Filter by condition | Filter by column values ⓘ

Text includes ▼

sutter

Cancel | Apply Filter

The smart table is filtered and displays an updated row count. The **Filters** icon displays the column name and filter criteria are highlighted. Hover over the filter information to view a tooltip with all of the values.

Tip: Click the highlighted filter information to open the column filter pop-up.

← hcos.csv | Show all records ▼ | View Original File | Download

8 Rows | Filters Applied: corporate_name__v INCLUDES "sutter health" ×

vid__v	corporate_name__v	hco_type__v
242979608561976321	Sutter Health	Organization, Health System
937785160227161724	Sutter Health Sunnyvale Center	Organization, Group Practice

Filter by column values

When the **Filter by column values** tab is selected, all of the values in the column are listed. A count displays beside the value to identify the number of rows that the value applies to. Select one or more values to filter the smart table.

By default, the values are sorted in descending order by row count. Use the **Sort** icon beside **Value** and **Number of Rows** to reorder the list in ascending or descending order.



Filter by condition

Filter by column values ⓘ

<input type="checkbox"/> VALUE ⇅	NUMBER OF ROWS ⇅
<input type="checkbox"/> South Texas Radiology Imaging Centers	16
<input type="checkbox"/> First Surgical Consultants	5
<input type="checkbox"/> Radiological Associates Of Sacramento Radiation Oncology Center	3
<input type="checkbox"/> Sutter Health	3
<input type="checkbox"/> Valley Medical Oncology Consultants	3
<input type="checkbox"/> Alta Bates Summit Medical Center Alta Bates Campus	2
<input type="checkbox"/> Alta Bates Summit Medical Center Summit South Campus	2
<input type="checkbox"/> CVS Distributors	2
<input type="checkbox"/> California Cancer Care	2

Use the search bar to find a specific value. For example, type *sutter* to find values containing that name in the column.

Filter by condition

Filter by column values ⓘ

<input type="checkbox"/> VALUE ⇅	NUMBER OF ROWS ⇅
<input checked="" type="checkbox"/> Sutter Health	3
<input type="checkbox"/> Sutter Amador Hospital	2
<input type="checkbox"/> Sutter Auburn Faith Hospital	2
<input type="checkbox"/> Sutter Delta Medical Center	2
<input type="checkbox"/> Sutter Pacific Medical Foundation	2
<input type="checkbox"/> Sutter Pacific Medical Foundation Cardiac Electrophysiology	2
<input type="checkbox"/> Sutter Pacific Medical Foundation Obstetrics And Gynecology	2
<input type="checkbox"/> Fort Sutter Infusion Center Public Health Service Outpatient	1
<input type="checkbox"/> Fort Sutter Surgery Center Navdeep Nijher MD Fssc	1
<input type="checkbox"/> Smf Ft Sutter Surg Oncology	1



Blank values

If the column contains blank values, they display in a (Blanks) category at the top of the list. This includes field values that are Null and No Value.

Filter by condition	Filter by column values
Search column values	
<input type="checkbox"/> VALUE	NUMBER OF ROWS
<input type="checkbox"/> (Blanks)	360
<input type="checkbox"/> 092DFDG00	1
<input type="checkbox"/> 0CB4R7P00	1
<input type="checkbox"/> 0G51J7C00	1

Filter local records

If the smart table contains a vid__v column, you can filter the file to show only records in your instance. If there is no vid__v column, all records will always be displayed.

status_update_time__v	top_parent__v	verified_date__v	vid__v
2021-01-07T12:56:21.000-08:00	242977296846160897		242976927705465856
2021-01-07T13:08:01.000-08:00	242976927730631680		242976927730631680
2021-03-29T10:32:11.000-07:00	928644903549992992		242976927873238016

Note: If there are multiple columns called vid__v exactly, only the first vid__v column is used.

There are three filter options:

- **Show all records** - All records in the smart table display. This is the default option.
- **Show records in my instance** - Display only the records where vid__v values are in your Network instance.
- **Show records not in my instance** - Display only the records where vid__v values are in the OpenData instance; not in your Network instance.

These options support Veeva standard objects (HCPs, HCOs, addresses, licenses, and parent HCOs); custom objects are not supported.



Records that display for each option

Unless noted, records with all record states and statuses display.

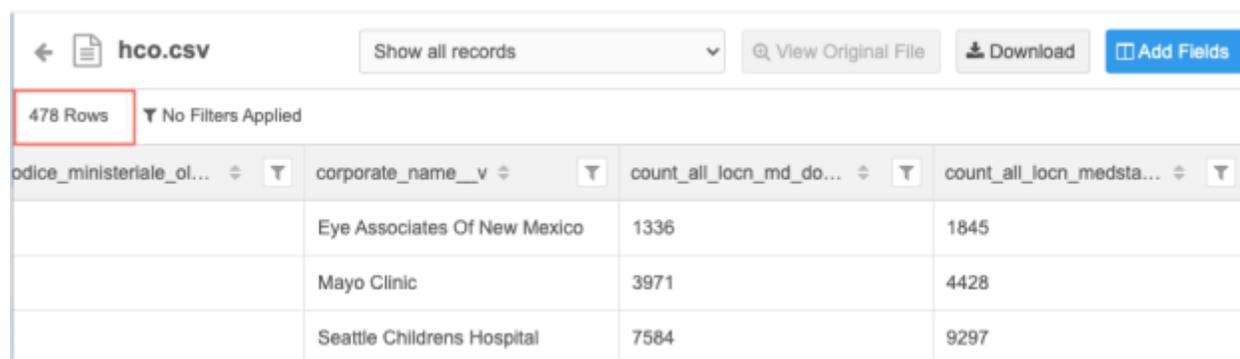
Filter options	Local Records	OpenData Records	Third Party Records
Show all records	✓	✓	✓
Only show records in my instance	✓	✓ Includes opted out records that have been downloaded.	✓
Only show records not in my instance	✗	✓ Includes records that you have unsubscribed from OpenData (record state = DELETED).	✗

SMART TABLE ROWS

23R1

Row count

When you open a smart table in File Explorer, it can be difficult to understand how many rows it contains and what the data looks like. Now, you can see a count of rows in the file.



Smart tables display only the first 1000 rows in the file; the count identifies all rows. When filters are applied, all of the rows are filtered, not just the first 1000 rows that display. Additionally, if you download the smart table, the filter is applied to all rows in the downloaded file.



Filtered count

When you filter a smart table, the count updates to display only the filtered rows.

hco.csv			
Show all records		View Original File	Download
16 Rows	Filters Applied: corporate_name__v: South Texas Radiology Imagi...		
idice_ministeriale_ol...	corporate_name__v	count_all_locn_md...	count_all_locn_medsta...
	South Texas Radiology Imagin...	1336	1845
	South Texas Radiology Imagin...	3971	4428
	South Texas Radiology Imagin...	7584	9297

SMART TABLE LOGS

23R1

Administrators can now use the System Audit Log to track when users open and download smart tables.

System Audit History						
Date range		To	Object Types	Properties		
2023-03-05		2023-03-06	Select an option	Select an option	Get History	Res
Choose time period...						
EVENT ID	TIMESTAMP	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE	PROPI
942359475397725343	2023-03-06 19:21:44 GMT	admin@verteo.com	smart tables/test files/test zip...	ViewContents	FileSystemExplorer	
942359451735952543	2023-03-06 19:15:43 GMT	admin@verteo.com	/smart tables/test files/test zips	Upload	FileSystemExplorer	
942359446220049567	2023-03-06 19:14:19 GMT	admin@verteo.com	/outbound/VCRM00D110000...	Download	FileSystemExplorer	
942359445105740959	2023-03-06 19:14:02 GMT	admin@verteo.com	/smart tables/test files/test zips	Create	FileSystemExplorer	path



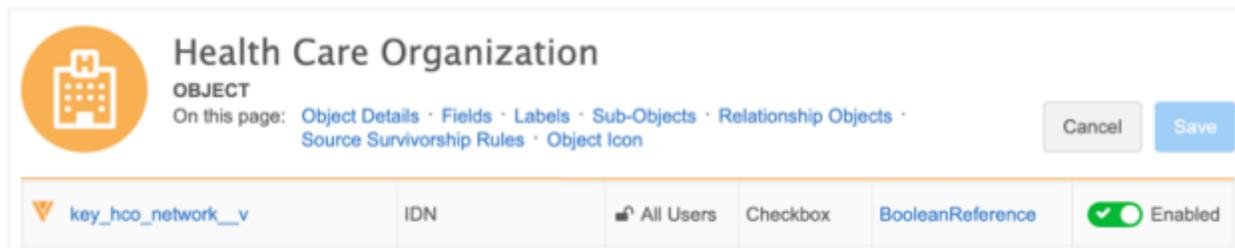
Data model

KEY NETWORK/IDN FIELD

23R1

A new field, `key_hco_network__v`, is added to the HCO object to help you identify the top-level HCOs that are considered key networks (or integrated delivery networks (IDNs)) in your Network instance.

This checkbox field is managed by Veeva OpenData.



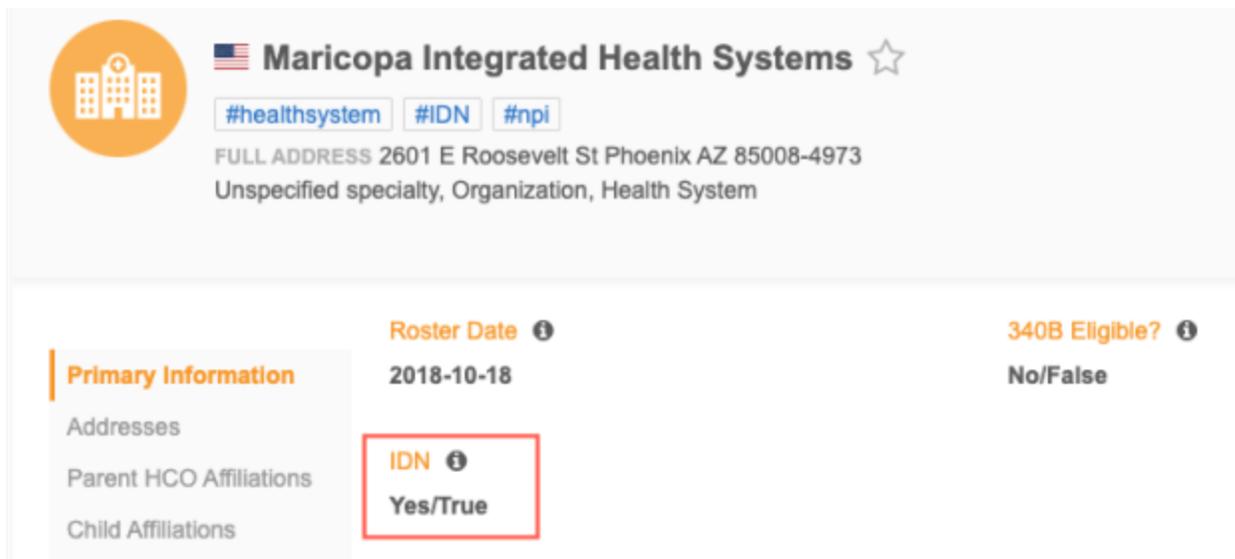
The field will be enabled by default in new Network instances. You can enable it for your existing Network instance.

Field label

The label that displays on record profiles depends on the HCO’s primary country.

- US – IDN?
- All other countries – Key Network?

Example IDN field on a record profile





Key points

- **Changes** - The field value cannot be changed by submitting DCRs to OpenData.
If you would like to manage your own list of IDNs, you can use a custom field.
- **Hierarchy Explorer** - The field is available to use in the widget so you can navigate the hierarchies of HCOs at the top of the network. The field is added to the hierarchy index by default.
- **Reporting on OpenData** - The field will be added to the flat hierarchy table for OpenData instances and on the flat ownership hierarchy table for OpenData US subscriptions (**Reports > SQL Query Editor**).
- **Search** - Use the #KeyNetworks or #IDN hashtags to find these HCOs in your Network instance.

IDN requirements (US only)

In the US, OpenData identifies IDNs/Key Networks using the following criteria.

IDN Criteria	Health Systems	Single Hospital Networks	Regional Health Systems	Practice Networks
Is Top Parent?	Yes	Yes	No	-
Is Owned by Health System?	-	-	Yes	No
Minimum Number of Hospitals Owned	2	1	1	-
Minimum Number of HCOs Owned	-	5	5	5
Minimum Number of Affiliated HCPs (to owned HCOs)	100	50	100	100
Example Key Network	Mayo Clinic, Sutter Health	University Health System	UCLA Health, Dignity Health	Texas Oncology, Florida Cancer

Key Network requirements (UK only)

In the UK, OpenData identifies Key Networks using the following criteria.

- **HCO Type** = Integrated Care System (ICS)
(hco_type__v = 36_21)

Example Key Network: North West London ICS



PRIMARY SUPPORT FOR SUB-OBJECTS

23R1

The Unique Checkbox primary calculation options that were previously available only for addresses are now supported for licenses, parent HCOs, and custom sub-objects.

Administrators can now use these options to allow Network to recalculate a Unique Checkbox primary on any sub-object for specific conditions. Using these recalculation options or custom logic gives you more flexibility for defining a primary.

Type ? Primary

Configuration ? Unique Checkbox

When to Calculate Primary Parent HCO

- The record DOES NOT HAVE a primary Parent HCO
- The status of the primary Parent HCO is INACTIVE
- Recalculate only if there are active Parent HCO on the record
- The record state of the primary Parent HCO is INVALID or DELETED

Primary Parent HCO Recalculation Logic

Use standard logic

Define custom logic

Select new primary Parent HCO where:

CONDITION	
IF	Source Rank on primary field is the same or higher than that on existing primary Parent HCO.
ELSE IF	Last updated time of primary field is the latest.
ELSE	Parent HCO Entity ID is the newest.

Exclude Parent HCOs that meet the following criteria when recalculating primary Parent HCO:

FIELD	VALUE
Record State (record_state__v)	Invalid
Status (parent_hco_status__v)	Inactive

[+ Add Field](#)

This enhancement is available by default in your Network instance. It is supported for Unique Checkbox primary configurations only.

Important: The updates to Unique Checkbox on licenses does not impact the mapping of licenses to Veeva CRM.



Unique Checkbox options

The Unique Checkbox primary configuration ensures that the primary flag does not move from an object so your business processes can depend on the setting. The calculation options allow Network to recalculate the primary for specific conditions to ensure that a record always has a primary; for example, if the existing primary object becomes inactive or invalid.

When you create a primary type field and choose the **Unique Checkbox** configuration, the calculation options display when a sub-object is selected in the **Network Object** field for the **Country Visibility and Field Rules**.

▼ Country Visibility and Field Rules

Countries	Network Objects
Countries *	Canada x United States x
Network Object *	Parent HCO
Value	No Value
Required / Update ⓘ	<input type="checkbox"/>

The **When to Calculate Primary** options display in the **Properties** section.

When to Calculate Primary

Parent HCO ⓘ

- The record DOES NOT HAVE a primary Parent HCO
- The status of the primary Parent HCO is INACTIVE
 - Recalculate only if there are active Parent HCO on the record
- The record state of the primary Parent HCO is INVALID or DELETED

You can select any combination of these options to allow Network to calculate the primary for specific situations:

- **The record DOES NOT HAVE a primary** - For records that do not have a primary defined (the field has no value (-) or the value is set to **Unknown** or **No/False**) Network will set a primary. Only valid, under review, and active objects are considered.
- **The status of the primary is INACTIVE** - For primary sub-objects where the record status is *Inactive*, Network will recalculate a primary address.

If there are no active objects on the record, a primary is not calculated so the record will not have a primary.

- **Recalculate only if there are active <objects> on the record** - Network only recalculates the primary if there are objects addresses on the record. If there are no active objects, Network keeps the primary on the object that was last active.

This option ensures that the record has a primary even if the object is inactive.

- **The record state of the primary is INVALID or DELETED** - For primary objects that have been reviewed and are considered invalid, Network will recalculate a primary.



By default, none of these options are selected, so the primary setting will not move from a sub-object that uses the Unique Checkbox configuration.

Multiple primary fields can be created for a sub-object using the Unique Checkbox configuration, so you can define primary addresses with each specific behavior to support your business needs.

Primary logic

The **Primary Address Recalculation Logic** section displays if any of the calculate options have been selected.

When to Calculate Primary Parent HCO

The record DOES NOT HAVE a primary Parent HCO

The status of the primary Parent HCO is INACTIVE

Recalculate only if there are active Parent HCO on the record

The record state of the primary Parent HCO is INVALID or DELETED

Primary Parent HCO Recalculation Logic

Use standard logic

Define custom logic

Select new primary Parent HCO where:

CONDITION	
IF	Source Rank on primary field is the same or higher than that on existing primary Parent HCO.
ELSE IF	Last updated time of primary field is the latest.
ELSE	Parent HCO Entity ID is the newest.

Exclude Parent HCOs that meet the following criteria when recalculating primary Parent HCO:

FIELD	VALUE
Record State (record_state__v)	Invalid
Status (parent_hco_status__v)	Inactive

When Network recalculates a primary, specific fields are matched against the existing sub-object record to find the best primary.

You can define custom logic to specify the fields that you want Network to consider during the primary recalculation. This ensures that the record that is the most relevant for your business purposes is selected as primary. For example, using Network's standard logic, an address that is outside of the sales territory could be calculated as the new primary because the standard recalculation logic does not consider postal codes.

Note: Recalculation logic runs when the existing primary sub-object defined on a record becomes disqualified.



Choose one of the options:

- **Use standard logic** - Standard logic considers the following fields: source rank, last updated date and time of the primary field, and the newest Veeva ID on the sub-object. This is selected by default.
- **Define custom logic** - Define the fields that you want Network to use for recalculating a primary. A maximum of three conditions can be defined.

Example

To ensure that the primary affiliation is in the same sales territory as the HCP or HCO, add the entity address ID as a custom condition.

The screenshot shows the configuration for Primary Parent HCO Recalculation Logic. It features two radio buttons: 'Use standard logic' (unselected) and 'Define custom logic' (selected). Below the radio buttons is a descriptive text: 'Define the Parent HCO fields to match against the existing primary Parent HCO. The Parent HCO on the entity containing the most matches with the current primary will replace it as primary. If multiple Parent HCOs contain the same number of matches, standard logic is used to select a primary Parent HCO from them.' A table titled 'CONDITION' contains two rows: 'IF' with a dropdown menu set to 'Entity Address vid (entity_address_vid__v)' and a description 'on any Parent HCO matches current primary Parent HCO, select that Parent HCO.', and 'ELSE' with the text 'use standard logic to recalculate primary Parent HCO.'. Below the table is a '+ Add Condition' link. Underneath is a section titled 'Exclude Parent HCOs that meet the following criteria when recalculating primary Parent HCO:' followed by a table with two columns: 'FIELD' and 'VALUE'. The table lists 'Record State (record_state__v)' with value 'Invalid' and 'Status (parent_hco_status__v)' with value 'Inactive'. A '+ Add Field' link is at the bottom.

Exclude sub-objects

Network automatically excludes sub-objects that are Invalid and Inactive. You can define additional sub-object criteria to exclude from the primary recalculation. A maximum of three custom exclude criteria can be added.

Standard logic recalculation

When Network recalculates the primary using standard logic, the following steps are taken:

1. **Run Inactive/Invalid logic** - Exclude sub-objects that are Inactive or Invalid.
2. **Run the exclude logic** - Remove any sub-objects for primary consideration based on the exclude criteria you have defined.
3. **Run the standard condition logic** - Network recalculates the best primary based on the order of the standard conditions: source rank, last updated date and time, and the newest Veeva ID

Custom logic recalculation



When Network recalculates the primary using custom logic, the following steps are taken:

1. **Run Inactive/Invalid logic** - Remove sub-objects that are Inactive or Invalid.
2. **Run the exclude logic** - Remove any sub-objects for primary consideration based on the exclude criteria you have defined.
3. **Run the custom condition logic** - If the first condition is met, then the sub-object with the condition is the new primary. If multiple sub-objects match the conditions, the sub-object with the most matches is the new primary. If the condition is not met, move on to the next condition.
4. **Run standard logic** - If multiple sub-objects match the current primary with the same number of matches, Network uses the standard logic conditions as a tie-breaker to recalculate the new primary. Only the sub-objects that matched the custom conditions are considered.

PROFILE LAYOUTS

23R1

NAS standard layout for HCOs

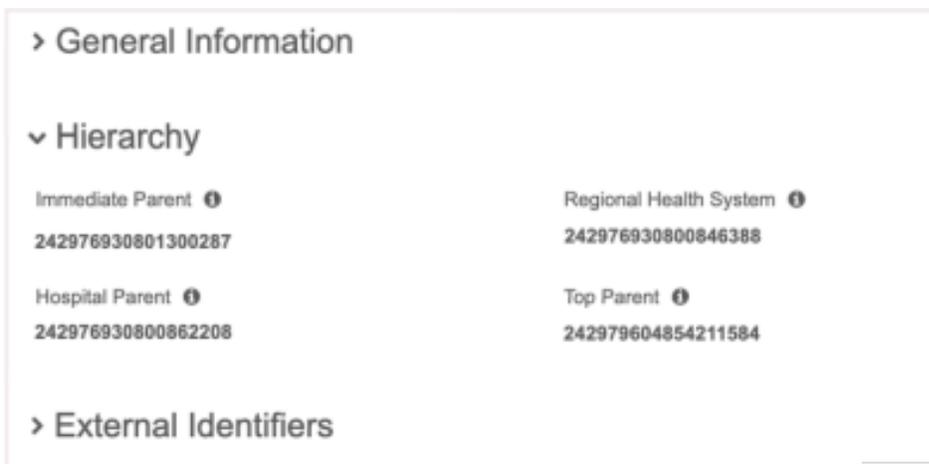
A section called **Hierarchy** is added to the default *NAS* standard profile layout for HCOs. It is located between the **General Information** and **External Identifiers** section.

The **Hierarchy** section contains the following fields on the HCO object:

- `immediate_parent__v` – Entity ID of the HCO Parent with 'Ownership' Relationship Type.
- `hospital_parent__v` – Entity ID of the Hospital the HCO rolls up to.
- `regional_health_system__v` – Entity ID the HCO rolls up to that is a child of a Health System and has `key_hco_network__v = 'Y'`
- `top_parent__v` field - Top parent for this entity.

These fields are managed by Veeva OpenData and are read only; they cannot be changed by submitting data change requests.

Example Hierarchy section on US HCO record profiles



This enhancement is enabled by default in your Network instance.



COUNTRY SUPPORT

22R3.1

Veeva OpenData data models have been added for the following countries:

- Algeria (DZ)
- Cameroon (CM)
- Cote d'Ivoire (CI)
- Cyprus (CY)
- Ghana (GH)
- Israel (IL)
- Kenya (KE)
- Malta (MT)
- Mauritius (MU)
- Morocco (MA)
- Senegal (SN)
- South Africa (ZA)
- Tunisia (TN)

These countries will be managed in the EMEA OpenData instance.

The data models are based on the Other Countries (ZZ) data model. The data model also includes additional fields so they are consistent with other data models supported by the EMEA OpenData team.

The activated reference codes are based on the reference codes that are activated for Other Countries (ZZ), along with additional reference codes supported by the EMEA OpenData team.

Localization

The Network UI, data model, and reference codes use the following languages for each country.

Country	Network UI and Data Model	Reference Codes
Algeria (DZ)	French (fr)	French (fr)
Cameroon (CM)	English (en), French (fr)	English (en), French (fr)
Cote d'Ivoire (CI)	French (fr)	French (fr)
Cyprus (CY)	English (en)	Greek (el), Turkish (tr)
Ghana (GH)	English (en)	English (en)
Israel (IL)	English (en)	Hebrew (he)
Kenya (KE)	English (en)	English (en)
Malta (MT)	English (en)	English (en)
Mauritius (MU)	English (en)	English (en)
Morocco (MA)	French (fr)	French (fr)



Country	Network UI and Data Model	Reference Codes
Senegal (SN)	French (fr)	French (fr)
South Africa (ZA)	English (en)	English (en)
Tunisia (TN)	French (fr)	French (fr)

DATA PRIVACY OPT OUT

22R3.1

Veeva OpenData now manages HCP opt outs in the following countries:

- Algeria (DZ)
- Cameroon (CM)
- Cote d'Ivoire (CI)
- Cyprus (CY)
- Ghana (GH)
- Israel (IL)
- Kenya (KE)
- Malta (MT)
- Mauritius (MU)
- Morocco (MA)
- Senegal (SN)
- South Africa (ZA)
- Tunisia (TN)

Two data model fields have been enabled for these countries for the HCP object:

- `data_privacy_opt_out__v`
- `data_privacy_opt_out_date__v`

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.

Opted-out countries

To review the list of opted-out countries, in the Admin console:

1. Click **Data Model > Data Domains** and choose the **Customer Master** domain.
2. Select the **Health Care Professional** object and find the `data_privacy_opt_out__v` field in the **Fields** section.
3. Click the field to review the list of opted-out countries that are managed by Veeva OpenData.



FORMATTED NAME

22R3.1

A custom calculation has been added for the `formatted_name__v` field for Vietnam. The formatted name uses values from several name fields to display a complete name for an HCP.

This enhancement is enabled by default in your Network instance.

Name calculation

HCP names for Vietnam are calculated using these Veeva fields in the following order:

```
<last_name__v> <first_name__v>
```

Note: There is a space between the Last Name and First Name fields.

The formatted name displays on the profile page.

Transformation queries

Network can transform data so you can pre-process the data before loading it or post-process the data after exporting it.

In this release, enhancements have been made to help you transform additional file names and types.

FILE OPTIONS

22R3.1

Administrators can now process the following types of files names and file types in transformation queries.

Inbound queries

- non-static files names
- delimited text files with any file extension

Previously, only .csv files with static file names were supported for inbound queries.

Outbound queries

- DCR Export files

Previously, outbound queries supported files for Data type target subscriptions only.

These enhancements are available by default in your Network instance.



Inbound queries

Inbound transformation queries can now process files using the file name alias that you define in the source subscription configuration. This enables you to query input files that have non-static file names and delimited text files with any file extension.

For best results, reference input files by their alias for all new inbound transformation queries. Existing inbound queries that use a static file name are still supported.

Example - Non-static file names

The HCP source file that you want to process has a timestamp (for example, *HCP_2023-01-30_04-45-07.csv*) in its file name. In the source subscription configuration, define the file name as `HCP*` and define the alias as `HCP_INPUT_FILE`.

Aliases must be defined with uppercase letters.

File Definitions ?

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

In the transformation query, refer to the source file by its alias (`HCP_INPUT_FILE`) instead of its file name. Notice that the `__csv` file extension is required to distinguish the file from other regular table names in reporting.

Format Query

```

1 SELECT
2     id AS vid__v,
3     first_name || ' ' || last_name AS formatted_name__v,
4     country AS primary_country__v
5 FROM
6     hcp_input_file__csv
    
```

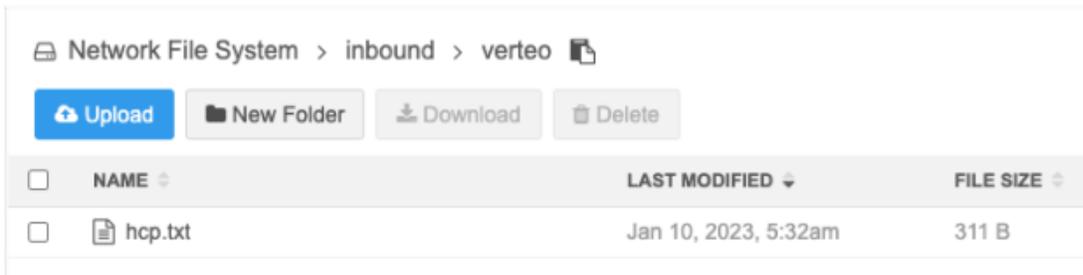
Tip: File names and file aliases are not case-sensitive in transformation queries.



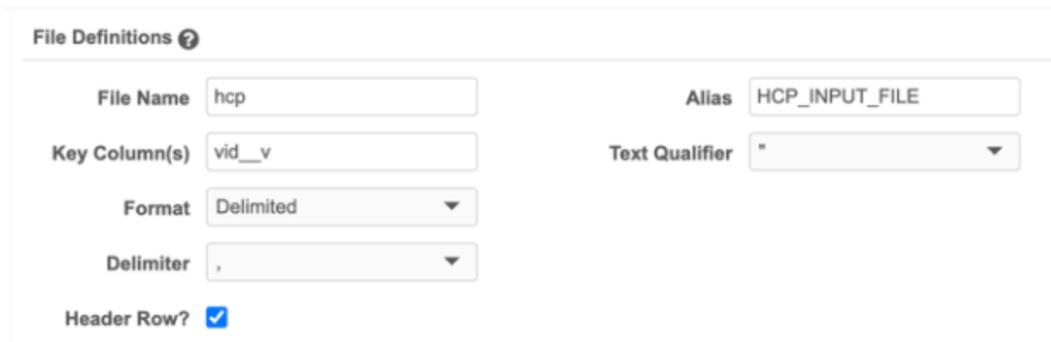
Link the transformation query to the source subscription. When the subscription runs, the transformation query will process the input file by its file alias.

Example - Delimited files with any file extension

The HCP source file has a .txt extension (for example, *HCP.txt*).



In the source subscription configuration, define the file name as HCP and define the alias as HCP_INPUT_FILE.



In the transformation query, refer to the source file by its alias (HCP_INPUT_FILE). Notice that the __csv file extension is required to distinguish this as source file; otherwise, it will be considered a reporting table name.



Link the transformation query to the source subscription. When the subscription runs, the transformation query will process the .txt input file by its file alias.

For detailed steps for creating and using transformation queries, see [Transforming inbound data](#) in the *Veeva Network Online Help*.



Outbound queries

Transformation queries can now post-process DCR export files (third-party owned DCRs) so you can export it in the format that third party systems expect to receive.

Example

To transform third-party owned DCRs after the files are exported, create a transformation query that references the DCR export files:

- DCR_BATCH (header file)
- DCR_FIELD_BATCH (line item file)

In the transformation query, omit the UNIX timestamp that is automatically applied to the export files in the archive (for example, a file name is DCR_BATCH_1669990415331.csv).

Add the `__csv` extension to each file name in the query.

This query joins the header file with the field file to produce a single export file instead of two.

```

Format Query
1 SELECT
2     header.dcr_id,
3     header.dcr_section_id,
4     header.dcr_type,
5     header.subject,
6     header.entity_type,
7     header.entity_id,
8     line_item.field_name,
9     line_item.old_value,
10    line_item.change_requested
11 FROM
12    dcr_batch__csv header JOIN dcr_field_batch__csv line_item
13    ON header.dcr_id = line_item.dcr_id
14    AND header.dcr_section_id = line_item.dcr_section_id
15 ORDER BY
16    header.dcr_id,
17    header.dcr_section_id

```

In the DCR type target subscription, add the transformation query to the configuration.



▼ Transformation Queries

Select data transformation queries to be applied to this target subscription below.
 Can't find a transformation query? [Create a New Transformation Query](#)

QUERY	DESCRIPTION	QUERY OUTPUT	
third_party_dcrs	Transformed DCRs	transformed_dcrs.csv	View Query

[+ Add Query](#)

After the job runs, you can view the Job Details to see the records that were exported and the transformation queries that were applied.

Job details

▼ Transformation Queries

SEQUENCE	QUERY	DESCRIPTION	QUERY OUTPUT	NUMBER OF RECORDS	QUERY DURATION	
1	third_party_dcrs	Transformed DCRs	transformed_dcrs.csv	6	5s	View Query

Note: The Data Flow Diagram that displays on Data type target subscriptions is not available on DCR type subscriptions.

For detailed steps for creating and using transformation queries, see [Transforming outbound data](#) in the *Veeva Network Online Help*.

OpenData subscriptions

FILTERING DOWNLOADED PARENT HCOs

23R1

Administrators have more flexibility to limit the number of HCOs that are downloaded to your Network instance during Veeva OpenData downloads.

When you download an HCP, all of its parent HCOs are downloaded but some of the HCOs might not be relevant to your therapeutic areas. Now, you can use Network Expressions to define the parent HCOs that you want to download or ignore. Using Network Expressions can provide more flexibility for defining filters. You can filter using more fields and you can use lookup tables containing combinations of fields. Previously, filtering was limited to a list of specialties and HCOs types.

This enhancement is enabled by default in your Network instance.



Supported downloads

The parent HCOs filters will be applied when HCPs and HCOs are downloaded using the following methods:

- Ad hoc downloads (includes Sync with OpenData, Download from OpenData, and Ad Hoc Download jobs)
- Network Account Search in Veeva CRM
- Data change requests (add and change requests that are approved by OpenData)
- Search and download (Network UI, Network API, Network widgets)

Filters are applied to active relationships only.

How filters work

The filters traverse HCOs level by level to see which HCOs to update or download.

For each level of HCO, Network does the following when filters are defined:

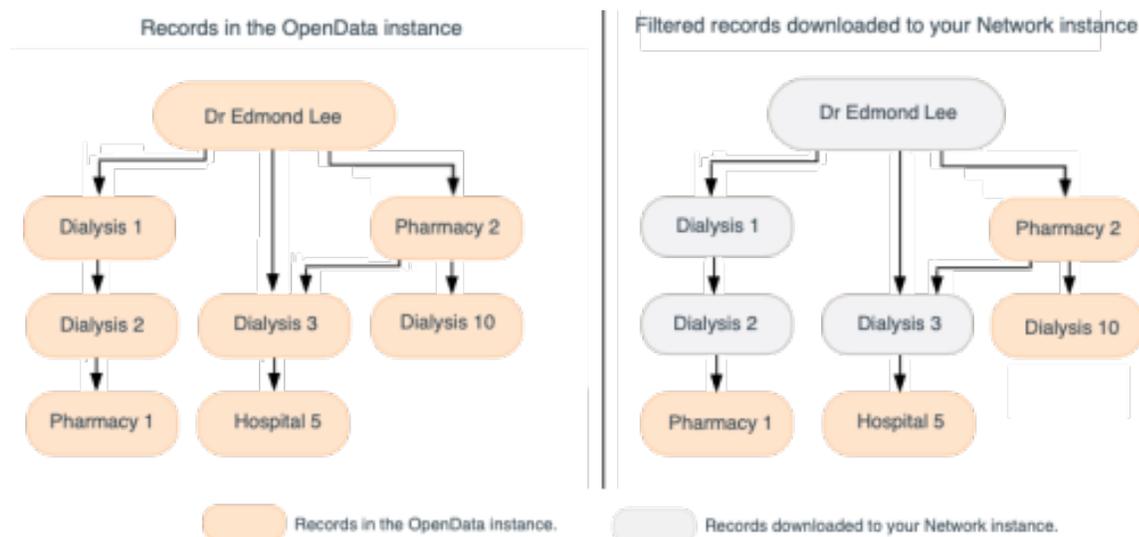
- If the HCO is already in your Network instance, it syncs the record and moves to the next level.
- If the HCO meets the basic filter or NEX rule, it downloads the record and goes to the next level.
- If the HCO does not meet the basic filter or NEX rule, the record is not downloaded and Network does not look at the next level beyond that HCO.

When filters are not defined, all parent HCOs up to the maximum level that you defined are downloaded.

Example

In this example, the parent HCOs are filtered so only Dialysis Centers are downloaded.

```
hco_type__v == '29:1,29:2,29:98,29:99'
```





Filter Parent HCOs

On the OpenData country subscription configuration, use the **Filter Parent HCOs during Ad Hoc Download and Data Change Requests** option to specify the records that are allowed to be downloaded.

This option is in the **Parent HCO** section; it was previously in the **Health Care Organization** section.

Parent HCO Choose the number of levels of parent HCOs to download during add requests, change requests, Sync with OpenData, Download from OpenData and Ad Hoc Download.

4 ▾ Level of parents to download ⓘ

Download repointed Parent HCOs ⓘ

Filter Parent HCOs during Ad Hoc Download and Data Change Requests ⓘ

Use Basic Filters to Filter Records

FIELD	CONDITION	VALUE		
Add conditions to select records.				
+ Add Condition				

Use NEX Rules to Filter Records

When this setting is selected, two options display:

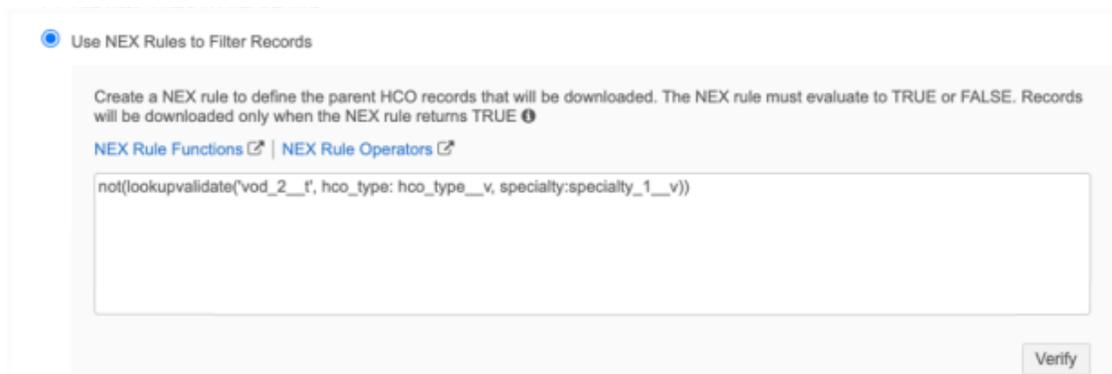
- **Use Basic Filters to Filter Records** - Use the Specialty or HCO Type fields to filter the parent HCO records that are downloaded. This was the existing option; no changes have been made to this behavior.

Use Basic Filters to Filter Records

FIELD	CONDITION	VALUE		
Any Specialty ▾	Contains ▾	Acute Care ✕	AND	✕
Type ▾	Contains ▾	Organization, Health System ✕		✕

If you had HCO Type or Specialty filters applied to your existing country subscription, those filters will be preserved in this option.

- **Use NEX Rules to Filter Records** - Use Network Expression rules to filter the parent HCO records that are downloaded.



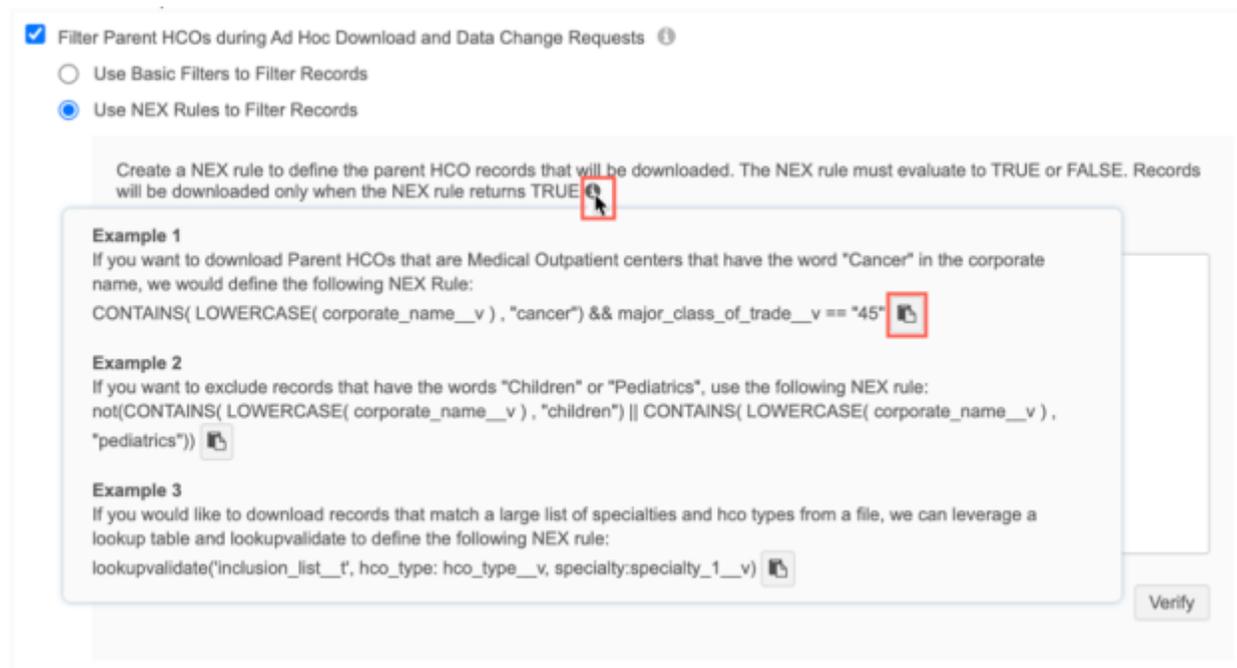
Create a NEX rule to specify the parent HCOs to include or ignore during OpenData downloads. Lookup tables can be used in the NEX rule.

Click **Verify** to validate the NEX rule syntax.

NEX rule help

For help with writing Network Expressions, see the following:

- **Examples** - Click the tooltip to view NEX rule examples. Click the copy icon beside the rule to copy it to your clipboard so you can paste it into the NEX rule field.



- **Documentation** - Click the **NEX Rule Functions** and **NEX Rule Operators** links to open the *Veeva Network Online Help*.



Key points for NEX rules

- The rule must evaluate to either `true` or `false`.
- One NEX rule is allowed.
- Square brackets are not required.
- Lookup tables can be used.
- Sets of fields are not supported (for example, `addresses__v`, `licenses__v`, `parent_hcos__v`, `custom_keys__v`).

Example NEX rules

Example 1

Download parent HCO if the HCO type is Organization, Health System (4:37).

```
hco_type__v == '4:37'
```

Example 2

Do not download parent HCOs that meet the HCO type and specialty criteria in the lookup table.

```
not(lookupvalidate('opendatafilter__t', hco_type: hco_type__v,  
specialty:[specialty_1__v, specialty_2__v]))
```

This example uses a lookup table. The lookup table includes a column for Specialty and HCO Type. Parent HCOs that meet the specialty and type combination will not be downloaded. For example, you might want to download parent HCOs that have the HCO type `Organization, Health System (4:37)`, but not HCOs that specialize in Emergency Medicine (EM).

specialty	hco_type
CD	4:4
GE	4:4
U	4:4
OTO	4:4
DEN	4:4
EM	4:37

Using lookup tables can give you more flexibility and be easier to maintain.

For information about creating lookup tables and using the lookup functions in Network Expressions, see [Lookup tables](#) in the *Veeva Network Online Help*.



Veeva CRM considerations

These filters can be applied in Veeva CRM when sales reps download accounts.

In CRM, the **ADD_PARENTS_TO_TERRITORY_vod** Network setting must be set to **1**.

When a user is adding an account in CRM, the filters are applied when a user *does not* select parent accounts in the **Add Account** pop-up.

If a parent account is selected, that record will be downloaded regardless of the filters that are applied in Network.

The screenshot shows a dialog box titled "Add Account" with a close button (X) in the top right corner. The main content area is titled "Select Parent Accounts" and lists two parent accounts, each with a checkbox and associated details:

- Hilo Hospital
#hospital #medicare #npi
1190 Waianuenue Ave Hilo US-HI 96720
- The Anesthesia Medical Group Inc
#medicare #npi
1360 S Beretania St Ste 215 Honolulu HI 96814-1520

At the bottom of the dialog box, there are two buttons: "Cancel" and "Next".

For details, see [Adding Parent HCOs to Territory when Importing an HCP or HCO](#) in the *Veeva CRM Online Help*.

Managing configurations

The filters that you define can be included in export packages so they can be imported to a target environment.

Logs

Administrators can track the changes that are made to the NEX rule parent HCO filters in the System Audit Log.



OPENDATA COMMUNICATIONS ENHANCEMENTS

23R1

The OpenData Communications feature was introduced in Network version 22R3.1. These enhancements have been introduced in 23R1.0.

Smart table support

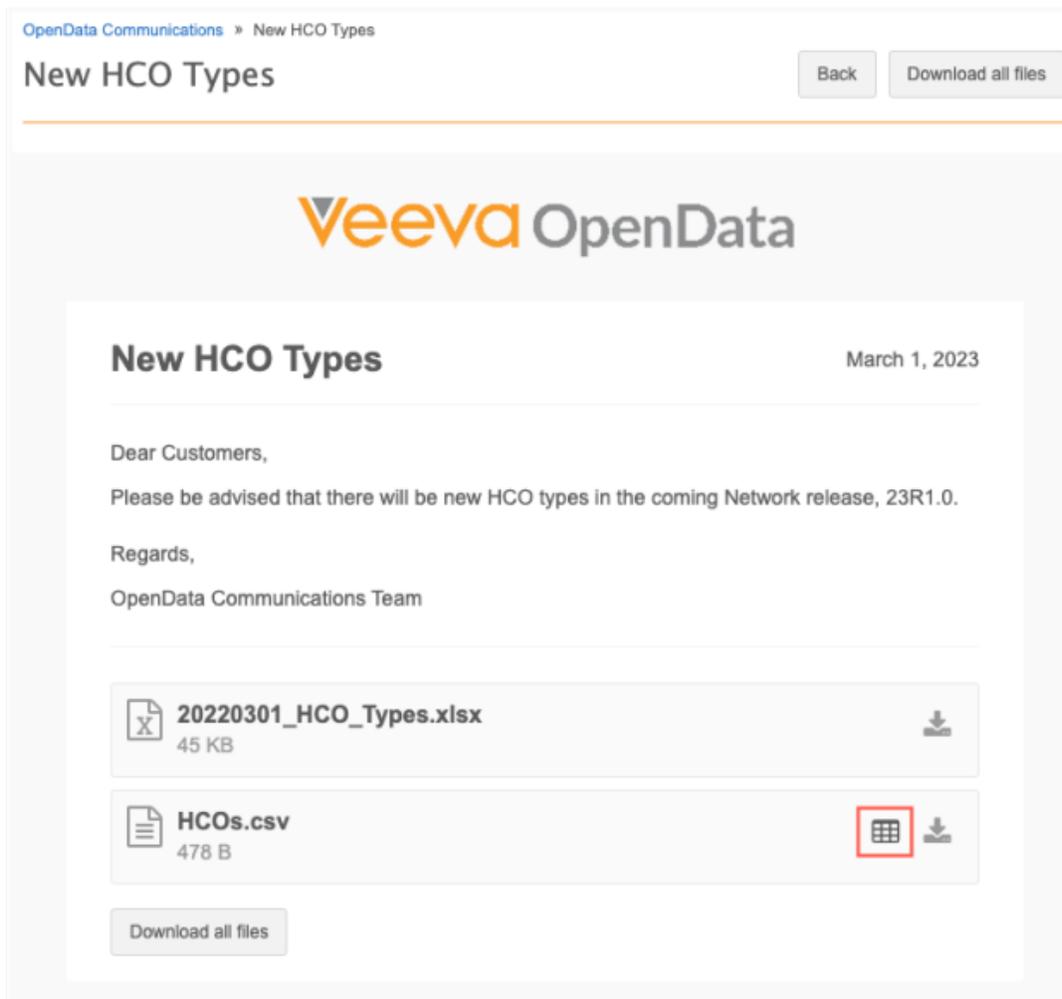
Files sent in OpenData Communications can be opened in a smart table so you can understand the content of the files and how it might affect the data in your Network instance. Previously, files could only be downloaded.

Note: Smart tables are supported for .csv files only.

This enhancement is enabled by default in your Network instance

Opening files

The **Smart Table**  icon displays beside .csv files that are sent by OpenData teams (**System Interfaces > OpenData Communications**). Click the icon to open the file in a new browser tab. Use the smart table to view, filter, and even augment the data.





Displayed records

If the .csv file contains a column called **vid__v**, the smart table opens with the **Only show records in my instance** filter applied. . This enables you to immediately view the records that are relevant to your Network instance.

When the file is filtered, the filter is indicated at the top of the file and on the relevant column. If you download the smart table, only the filtered data is downloaded.

owner_entity_vid__v	owner_entity_type__v	entity_vid__v	entity_type__v	vid__v
		243154001430840322	HCP	941616234055470239
		242976933233558529	HCO	941616251411565727
243154001430840322	HCP	243342584980702208	ADDRESS	941616244664700063
243154001430840322	HCP	929652467051792313	PARENTHCO	941581886442179766
242976933233558529	HCO	243244014499791924	ADDRESS	941616255365614751
242976933233558529	HCO	738732597340902401	PARENTHCO	941400519046661788

Available filter options:

- **Show all records** - All records in the smart table display.
- **Only show records in my instance** - Display only the rows in the file where **vid__v** values are in your Network instance.
Includes opted out records that have been downloaded to your Network instance.
- **Only show records not in my instance**- Display only the rows in the file where **vid__v** values are in the OpenData instance; not in your Network instance.
This includes OpenData records that you have unsubscribed from (record state = DELETED).

Tip: If no records display when the file opens, it means that none of the records are in your Network instance. Change the option to **Show all records** to view the records.

If the file does not contain a **vid__v** column, all records in the file display by default. The options to filter the records does not display.

Supported files

OpenData teams can now include Microsoft® Word® and Adobe® PDF files in OpenData Communications. Previously, only .csv files and Microsoft Excel (.xlsx) files were supported.

Additionally, attachments are now sorted alphabetically in communications.



Veeva OpenData

New Affiliations - March 2023

Mar 28, 2023

Dear Customer,

New affiliations will be available for specific HCO types.

Source: Centers for Medicare & Medicaid Services

When: April 24th

Please review the attached pdf file for further details. The file also contains a link to download the VIDs.

Sincerely,

Veeva OpenData

 **Affiliations Mar 2023 communication.pdf** 
60 KB

 **AGENDA.docx** 
24 KB

 **cms_vid_pairs_updated_20230327.csv** 
51 KB

 **Fields_used_Inbox.xlsx** 
74 KB

Download all files

Unread communications

The OpenData Communications page now tracks the read communications by individual user. Previously, after a user in your Network instance opened an OpenData Communication, the link to the communication was no longer highlighted in blue, indicating that it had already been read. Now, communications that you have not personally read remain highlighted to ensure that you do not accidentally miss important information from OpenData teams.

OpenData Communications			
Search by name or subject <input type="text"/>		Show All Countries <input type="button" value="v"/>	<input type="checkbox"/> Hide Read Messages Reset Filters
NAME	SUBJECT	COUNTRIES	TIME SENT
DEA Code Updates	Veeva OpenData Notice: Updates to DEA codes	3 Countries	2023-03-28 08:23:36.0
CMS Affiliation Updates	CMS Affiliation update - March 2023	72 Countries	2023-03-28 07:13:51.0
HCO Types	Notice New HCO Types	4 Countries	2023-02-01 03:46:18.0



OPENDATA COMMUNICATIONS

22R3.1

You can now view and manage communications from Veeva OpenData in your Network instance. This feature centralizes all notifications from the OpenData team so you can track information and activities and take any required actions.

NAME	SUBJECT	COUNTRIES	TIME SENT
Initial working set	Initial working set	3 Countries	2022-11-01 08:23:36.0
Inactivate addresses	Inactive unnecessary addresses	Bulgaria	2022-11-07 02:43:30.0
New HCO Types	Notice - New HCO Types	Austria	2022-11-23 07:40:06.0

Displaying 1 to 3 of 3 Show 25 1 of 1 < >

This feature is enabled by default in your Network instance.

Highlights

- Notifications are sent to you only about the countries that you subscribe to and that are enabled in your Network instance.
- A predefined user group, OpenData Communication Subscribers, is added to help Administrators manage the users that should receive OpenData communications.
- Emails are sent to subscribed users with links to view the full communication in Network.
- Attachments are not included in Veeva OpenData communication emails so they cannot be misplaced.

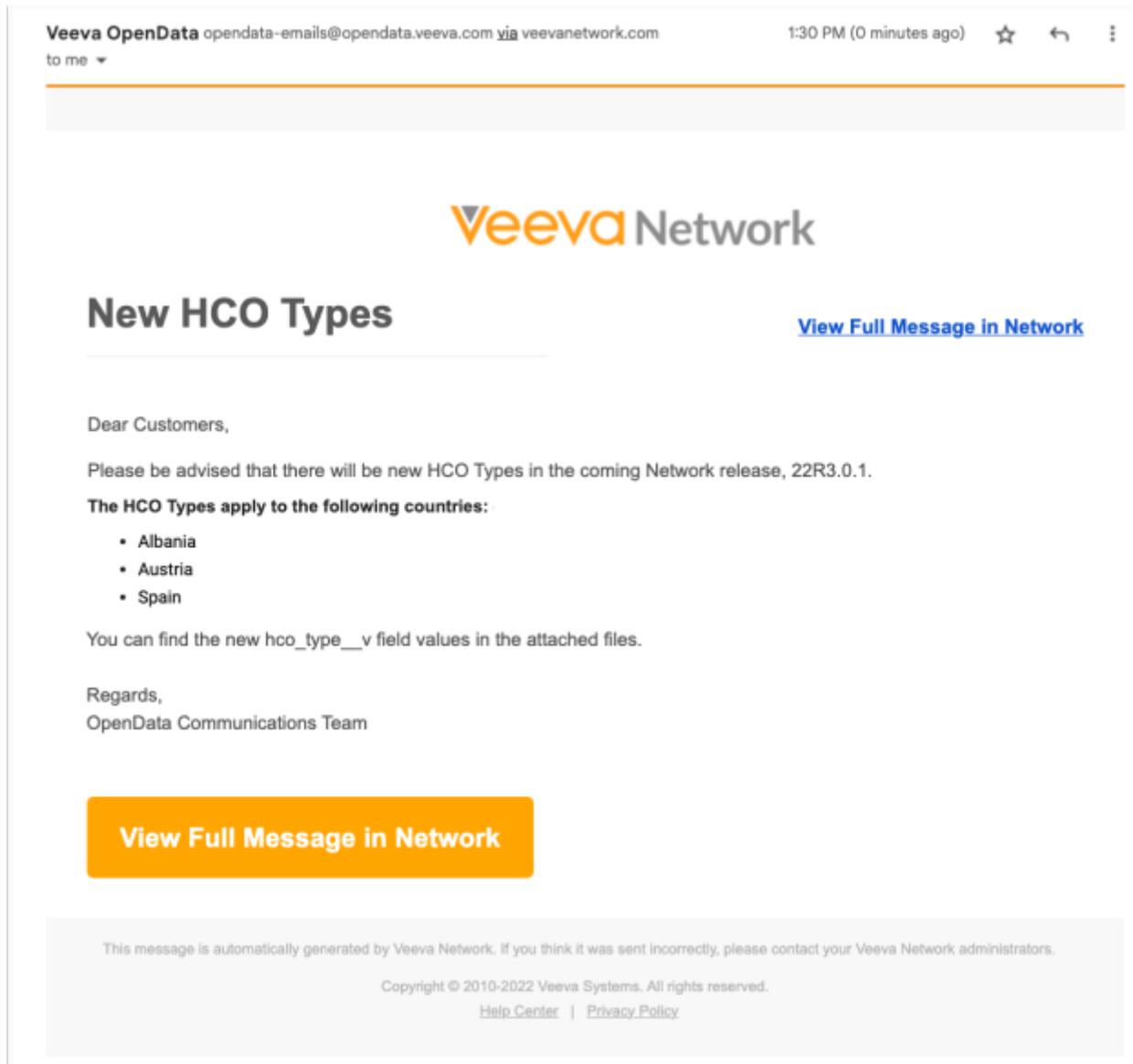
Receiving notifications

Users that are subscribed to receive OpenData communications will receive emails from OpenData from the following address: `opendata-emails@opendata.veeva.com`.

The email notifies you about OpenData activities that you should be aware of or that you should action. The email contains the text of the communication and a link to view the full message in Network. Attachments are not included in the email.



Example email



When you click **View Full Message in Network**, the communication opens in the Network application. Log in with your credentials if you are not already logged in.



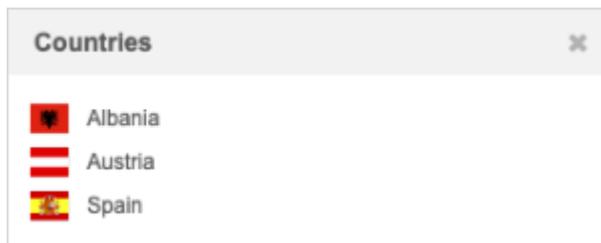
View communications

The full message and all attachments are available in the communication.

For each communication, the following details display:

- **Name** - The name that OpenData defined for the communication.
- **Subject** - The email subject.
- **Countries** - The countries that the communication applies to.

If there is one country, the country name displays. If multiple countries are selected, a count of countries displays. Click the count to display a pop-up of the countries.



- **Time Sent** - The date and time (in your local timezone) that the communication was sent by the OpenData team.



Example

New HCO Types

[Back](#) [Download all files](#)

Name New HCO Types

Countries  Austria

Subject Notice - New HCO Types

Time Sent 2022-11-23 14:24:08 CET



New HCO Types

Nov 23, 2022

Dear Customers,

Please be advised that there will be new HCO Types in the coming Network release, 22R3.0.1.

The HCO Types apply to the following countries:

- Albania
- Austria
- Spain

You can find the new hco_type__v field values in the attached files.

Regards,
OpenData Communications Team

 New_HCO_Types_22R3.0.0.csv 155 KB	
 HCO.csv 129 B	

[Download all files](#)



Downloading files

You can download files in an OpenData communication even if you do not have FTP access.

- Click **Download all files** or use the **Download** button on a file to download it individually.

Click **Back** to navigate to the OpenData Communications page.

OPENDATA COMMUNICATIONS PAGE

A new page is added so you can view and manage all of the communications that you receive from OpenData in your Network instance.

To open the page:

- In the Admin console, click **System Interfaces > OpenData Communications**.

NAME	SUBJECT	COUNTRIES	TIME SENT
Initial working set	Initial working set	3 Countries	2022-11-01 08:23:36.0
Inactivate addresses	Inactive unnecessary addresses	Bulgaria	2022-11-07 02:43:30.0
New HCO Types	Notice - New HCO Types	Austria	2022-11-23 07:40:06.0

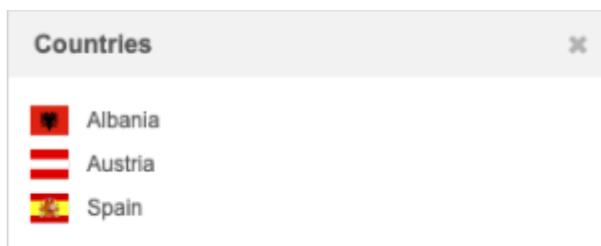
Displaying 1 to 3 of 3 Show 25 1 of 1 < >

All of the messages that you receive from OpenData display on the page in alphabetical order. Messages that have not been read yet display as bolded text.

For each communication, the following details display:

- **Name** - The name that OpenData defined for the communication.
- **Subject** - The email subject.
- **Countries** - The countries that the communication applies to.

If there is one country, the country name displays. If multiple countries are selected, a count of countries displays. Click the count to display a pop-up of the countries.



- **Time Sent** - The date and time (in your local timezone) that the communication was sent by the OpenData team.



Finding communications

To find a specific message, use one of the following methods:

- **Search** - Use the search bar to find a communication by name, subject, or the time it was sent.
- **Show All Countries** - Expand the list to filter the page by country. By default, all countries display.
- **Hide Read Messages** - Click to quickly find new messages.
- **Sort** - Sort the table using any of the columns.

OpenData Communications subscribers

To manage subscribers, Administrators can add users to a predefined user group called **OpenData Communication Subscribers**. The users that Administrators add to this user group will receive the emails sent by the OpenData team.

Note: Administrators, Data Managers, and System and Data Admin users can be added to the user group. These are the only users that have access to the OpenData Communications page in the Admin console.

To add subscribers:

1. In the Admin console, click **Users & Permissions > User Groups**.
2. On the User Groups page, click the **OpenData Communication Subscribers** group.

No users are added to the group by default.

3. Click **Add Users** and select the users that should receive OpenData emails.

The screenshot shows the 'OpenData Communication Subscribers' user group configuration page. It includes a 'Details' section with the following information:

- Name: OpenData Communication Subscribers
- Description: OpenData Communication Subscribers
- Type: System Managed Group
- Status: Active

Below the details is a 'Users' section with a search bar and 'Remove Users' and 'Add Users' buttons. A table lists the current members:

<input type="checkbox"/>	NAME	USERNAME	USER TYPE	STATUS	SECURITY POLICY	PROFILE	INBOX TASK GROUPS
<input type="checkbox"/>	Admin, PM	pm.admin@verteo.com	System Admin	Active	Classic	US Data	Data Loading Jobs
<input type="checkbox"/>	Manager, PM	pm.manager@verteo.com	Data Manager	Active	Classic	US Data	Data Loading Jobs, Data Stewards

At the bottom, it indicates 'Displaying 1 to 2 of 2' and a 'Show 25' dropdown menu.



OPENDATA EXPORTS TO PROCESS

22R3.1

OpenData subscriptions now include a count of the files that are pending and that will be processed the next time the subscription job runs. These updates are available on the OpenData Subscriptions page and for each country subscription.

This enhancement is available by default in your Network instance.

OpenData subscription page

The **OpenData Exports to Process** columns identifies the files that are pending for subscribed and enabled countries.

These are the files in the delta export; the records that have been added or changed in the Veeva OpenData instance for this country since the last time your subscription ran.

Veeva OpenData Subscriptions						
COUNTRY	SCHEDULE	LAST JOB TIME	LAST JOB STATUS	OPENDATA EXPORTS TO PROCESS	SUBSCRIPTION ENABLED	
Argentina	Manual			0	<input checked="" type="checkbox"/> Enabled	
Canada	Manual	2022-09-19 19:51:53 IST	COMPLETE	2	<input checked="" type="checkbox"/> Enabled	
Germany	Manual				<input type="checkbox"/> Disabled	
United States	Scheduled	2023-01-09 06:55:04 GMT	COMPLETE	0	<input checked="" type="checkbox"/> Enabled	

Note: When there are a large number of files to export, it can take some time to display the count. When the count is still processing, you can click a country subscription link to view the details on the country page.

Country subscription page

The **OpenData exports to process** count displays in the **Job Schedule** section.

Veeva OpenData Subscription (Canada)

Cancel Ad Hoc Download Start Job Save

▼ Job Schedule & Triggers

JOB SCHEDULE

OpenData exports to process: 2
 These files will be processed the next time this job runs. To process them now, click Start Job.

Updates from OpenData for this country are typically available:

- Every day at 08:00 GMT
- Every day at 20:00 GMT

Schedule Scheduled Manual

Additionally, enhancements have been made to the format of the update schedule so it is easier to read.



Merge

MERGE PREVENTION AND DATA PARTITIONING

22R3.1

Administrators can create rules to prevent records from merging if they contain specific values for fields. During the merge process, the records are compared to identify any fields or values that are used in the rules. If a rule fails, the records will not be merged.

You can create rules to prevent records from merging for the following scenarios:

- **Non-duplicate records** - Use field values to prevent non-duplicate records from being merged. For example, prevent two records from merging if they have different NPI numbers.
- **Data partitioning** - Isolate records with specific field values and prevent merges with records that don't share the same value. For example, prevent merges between records that have different reference values for the HCP Type field.

Example rule

This rule will prevent two HCP records from being merged if both records have an NPI number but the numbers are not the same.

HCPnpi [Delete] [Cancel] [Save]

▼ **Details**

Rule Name * HCP_npi_differs

Description Prevent merge if NPI is different

Code hcp_npi_differs__c

Countries * United States X

Status * **ENABLED**

▼ **Define Rule to Prevent Merges or Partition Data Based on Field Values**

Entity * Health Care Professional ▼

Field * NPI ▼

! This rule will enforce that 2 Health Care Professional records cannot be merged unless they both have a value in the field **NPI** and the value is identical.

This feature is enabled by default in your Network instance.



Supported jobs

Rules for merge prevention and data partitioning are applied to all subscriptions for existing records and incoming data:

- source subscriptions - data loading and bulk merge jobs
- data updater merge jobs
- suspect match tasks (Network UI and Network API)
- data deduplication jobs

These Network processes will use all of your enabled rules to prevent merges.

Supported objects

Merge prevention and data partitioning occurs at the entity level. The following entities are supported:

- HCPs
- HCOs
- custom main objects

Example scenarios

Review the following merge scenarios that use the following example rules:

- **Rule 1 - NPI number** - Do not merge if both records have a value for the NPI field, but the values are different.
- **Rule 2 - HCP Type** - Do not allow HCP Type A or B to be merged with any other type but themselves (A > A and B > B).

Note: Only one rule needs to fail to prevent the merge from occurring.

Attempted merge outcomes

Record 1	Record 2	Will Records Merge?	Reason
NPI: 1902849797 HCP Type: C	NPI: <empty> HCP Type: C	✓	One of the records does not have a value for NPI field, so the NPI rule is ignored. HCP type C is not one of the specified values in the rules, so the HCP Type rules are ignored.
NPI: 1902849797 HCP Type: C	NPI: 1366677486 HCP Type: C	✗	Both records have a value for NPI but they are different, so the rule fails. It doesn't matter which record has which value. If they are different, the records will be prevented from merging.



Record 1	Record 2	Will Records Merge?	Reason
NPI: 1902849797 HCP Type: C	NPI: 1902849797 HCP Type: C	✓	Both records have a value for NPI and they are the same, so the rule is ignored. Both records have a value for HCP Type and neither type is a value specified in the rules, so the HCP type rules are ignored.
NPI: 1902849797 HCP Type: A	NPI: 1902849797 HCP Type: C	✗	Both records have the same value for NPI, so that rule is ignored. Both records have a value for HCP Type but they are different. The rule fails because HCP Type A cannot be merged with HCP Type C.
NPI: 1902849797 HCP Type: A	NPI: 1902849797 HCP Type: <empty>	✓	Both records have the same value for NPI, so that rule is ignored. Only one record has a value for HCP Type. The HCP Type rule passes because type A isn't being merged with another HCP Type.
NPI: 1902849797 HCP Type: A	NPI: 1902849797 HCP Type: B	✓	Both records have the same value for NPI, so that rule is ignored. Both records have a value for HCP Type and they are different, but the records can merge because the rule allows HCP Type A to merge with HCP Type B.

Define rules

You can create rules to prevent merges and to partition data.

To create a rule:

1. In the Admin console, click **Data Model > Merge Prevention and Data Partitioning**.
2. Click **Add Rule**.
3. On the New Rule page, type a **Name** and **Description** for the rule.

Names can contain alphanumeric (A-Z, a-z, 0-9), underscore (_), and hyphen (-) characters only. A maximum of 100 characters is permitted.

Descriptions can contain any characters. A maximum of 100 characters is permitted.

4. In the **Countries** list, select the countries that the rule applies to. Multiple countries can be selected.

All countries that are available from Veeva OpenData display. Countries are not restricted by your data visibility profile.

5. Rules are enabled by default. To disable a rule, click the **Status** toggle.
6. In the **Entity** list, select the entity. One entity can be applied to each rule.

Only main entities display in the list. HCPs, HCOs, and main custom objects are supported.



7. Choose the **Field** to identify the criteria for the rule.

The list displays fields that apply to the selected entity and that are enabled in your Network instance. Veeva standard fields and custom fields are supported.

Excluded fields

- system fields (for example, vid__v and record_state__v)
- field sets (addresses__v, custom_keys__v, licenses__v, parent_hcos__v)
- date and date/time fields

Reference type fields

If you select a reference type field, you can choose to define a reference value. Veeva values and custom values are supported.

Example - No reference value

In this example, no value is provided for the HCP Type field. When no value is provided, two records cannot be merged unless they both have the same value in the HCP Type field.

A message displays below the field to explain the merge prevention behavior.

▼ Define Rule to Prevent Merges or Partition Data Based on Field Values

Entity * Health Care Professional

Field * HCP Type

Value No options selected

ⓘ This rule will enforce that 2 Health Care Professional records cannot be merged unless they both have a value in the field **HCP Type** and the value is identical.

To prevent merges for particular values, select values above.



Example - One reference value

When one value is defined, the merge is prevented when one of the records has that value and the other record has a value and but it is not the same.

▼ Define Rule to Prevent Merges or Partition Data Based on Field Values

Entity * Health Care Professional

Field * HCP Type

Value Dentist ×

ⓘ This rule will enforce that Health Care Professional records where **HCP Type** is "Dentist" cannot be merged with Health Care Professional records where **HCP Type** has a value and is not "Dentist".

The rule will be applied to all subscriptions: data loaded via source subscriptions, suspect match tasks, data deduplication jobs, bulk merge jobs, and data updater merge jobs.

Example - Two or more reference values

When multiple values are selected, the rule allows for merges only when both records have a value that is defined in the list.

In this example, if Record1 has the HCP type value `Doctor`, it will be allowed to merge with Record2, which has the HCP type `Resident`. If Record2 has the HCP Type `Dentist`, the merge is prevented.

▼ Define Rule to Prevent Merges or Partition Data Based on Field Values

Entity * Health Care Professional

Field * HCP Type

Value Doctor × Prescriber × Resident ×

ⓘ This rule will enforce that an Health Care Professional record where **HCP Type** is one of the selected values can be merged only with the Health Care Professional where **HCP Type** is in the list of selected values.

The rule will be applied to all subscriptions: data loaded via source subscriptions, suspect match tasks, data deduplication jobs, bulk merge jobs, and data updater merge jobs.

8. **Save** the rule.



Rules view

When you create rules, they display on the Rules for Merge Prevention and Data Partitioning page.

You can see all of the rules that have been created in your Network instance for every country.

Rules for Merge Prevention and Data Partitioning							Add Rule
Search rules...		Q	<input checked="" type="checkbox"/> Show Disabled Rules				
RULE NAME ▲	DESCRIPTION	COUNTRIES	ENTITY	FIELD	VALUE	STATUS	
HCP_type		United States	HCP	HCP (hcp_type_...	RES (RES), A (A), P (P)	⊗ DISABLED	🗑️
HCP_npi_differs		United States	HCP	HCP (npi_num_v)		✔️ ENABLED	🗑️
HCP_last_name		United States	HCP	HCP (last_name...		✔️ ENABLED	🗑️

Available actions

- **Search** - Type a keyword in the search bar to find rule names, countries, entities, and field names.
- **Sort** - To quickly find a rule, you can sort the table by the **Name**, **Entity**, **Field**, or **Status** columns.
- **Delete** - Click the **Delete** icon to remove a rule from your Network instance.
- **Enable or disable** - Click the toggle in the **Status** column.

Source subscriptions

Merges can be prevented when the source subscription loads data and when it is configured for bulk merge.

Data loading

When a source subscription runs, the job completes but any merges that are not allowed will be prevented.

On the Job Details page, the **Match Summary** will identify all matches that were found during the job.

Example

In this job, two matches were identified.

▼ Match Summary			
ENTITY	NOT MATCHED	ACT MATCHES	ASK MATCHES
Health Care Organization	0	0	0
Health Care Professional	0	2	0



In the **Job Result Summary**, two rejected matches are identified.

▼ Job Result Summary									
ENTITY	TOTAL	ADDED	CANDIDATES ADDED	UPDATED	MERGED	INVALIDATED	NOT LOADED	REJECTED	
Affiliation	0	0	0	0	0	0	0	0	0
DOG	0	0	0	0	0	0	0	0	0
Health Care Organization	0	0	0	0	0	0	0	0	0
Health Care Professional	1	1	0	0	0	0	0	0	2
Address	0	0	0	0	0	0	0	0	0
License	0	0	0	0	0	0	0	0	0
RELATIONSHIP	0	0	0	0	0	0	0	0	0
Account Link	0	0	0	0	0	0	0	0	0
Parent HCO	0	0	0	0	0	0	0	0	0
Custom Key	1	1	0	0	0	0	0	0	0

The **Job Error Log** section displays the count of records that were prevented from being merged. This also displays in the job error log that is exported to your FTP server.

▼ Job Error Log			
EXTERNAL ID	STAGE	RULE	MESSAGE
0	Dry Merge Stage	MergePrevention	During this job <2> record(s) have been rejected due to merge prevention rules.

Bulk merge

When source subscriptions are configured for bulk merge, the advanced property "job.merge.allowSourceMerge": "true" is defined in the **Module Properties**.

When bulk merges are loaded, the job will complete but the records that cannot be merged are skipped.

The Job Details page displays the results of the job.

- **Job Result Summary** The **Rejected** column does not display a count of records that were prevented from merging for bulk merge jobs. This column shows rejected records, but only the merge was rejected in these jobs, not the records.
- **Job Error Log** section shows a count of the records that we not merged.



Example error message

▼ Job Result Summary

ENTITY	TOTAL	ADDED	CANDIDATES ADDED	UPDATED	MERGED	INVALIDATED	NOT LOADED	REJECTED
Affiliation	0	0	0	0	0	0	0	0
DOG	0	0	0	0	0	0	0	0
Health Care Organization	0	0	0	0	0	0	0	0
Health Care Professional	0	0	0	0	0	0	0	0
Address	0	0	0	0	0	0	0	0
License	0	0	0	0	0	0	0	0
RELATIONSHIP	0	0	0	0	0	0	0	0
Account Link	0	0	0	0	0	0	0	0
Parent HCO	0	0	0	0	0	0	0	0
Custom Key	0	0	0	0	0	0	0	0

▼ Job Trigger Summary

Job Initiation: MANUAL

Job(s) Triggered: This job did not trigger any jobs.

Email(s) Triggered: This job did not trigger any emails.

▼ Job Error Log

EXTERNAL ID	STAGE	RULE	MESSAGE
0	Dry Merge Stage	MergePrevention	During this job <4> request(s) to merge records have been ignored due to merge prevention rules. less

If the job error log file was created by the subscription, it also displays the count of VIDs that were prevented from merging.

Tip: If two records should be merged, adjust or remove the value in the identified field and try the merge again.

Data updater

When records fail a merge rule, the rows are skipped in the Data Updater Merge job.

On the **File Summary** tab, the **Job Results** section displays a count of the skipped rows.

▼ Job Results

1
 HCP ROWS READ

0
 HCP MERGES APPLIED

1
 HCP ROWS SKIPPED



The **Job Error Log** section displays the count of records that were prevented from merging.

EXTERNAL ID	STAGE	RULE	MESSAGE
0	Dry Merge Stage	MergePrevention	During this job <1> request(s) to merge records have been ignored due to merge prevention rule... more

Tip: If the records are duplicates and should be merged, adjust or remove the value in the identified field and try the merge again.

Suspect match tasks

Data Stewards processing suspect match tasks will receive immediate feedback if the two records cannot be merged based upon the configured rules.

Example

When Data Stewards click **Apply** to merge two records, a message displays: *These records cannot be merged because HCP Type, NPI values differ.*

Possible actions when merges are prevented:

- Click **No Match** to reject the task.
- Open the profiles to validate or edit the data. If the records are duplicates, update the values so they are the same on both records or remove the incorrect/less used value. Reload the suspect match task and merge the records.

Note: Suspect match tasks currently ignore the values included in any merge prevention rules. Merges will be prevented if both records have a value in a specified field and that value differs (even if those different values are allowed in the merge prevention rule). To allow the records to merge, Data Stewards can edit the losing record so the values are the same or remove the value.



Data deduplication jobs

Data deduplication jobs will prevent merges based on all enabled rules in your Network instance.

When the subscription runs, the job completes and you can view the counts on the Job Details page to see what merges were actually completed.

Viewing the merges that were prevented is not available in this release.

Disabled fields and reference values

Merge rules support enabled fields and reference values only.

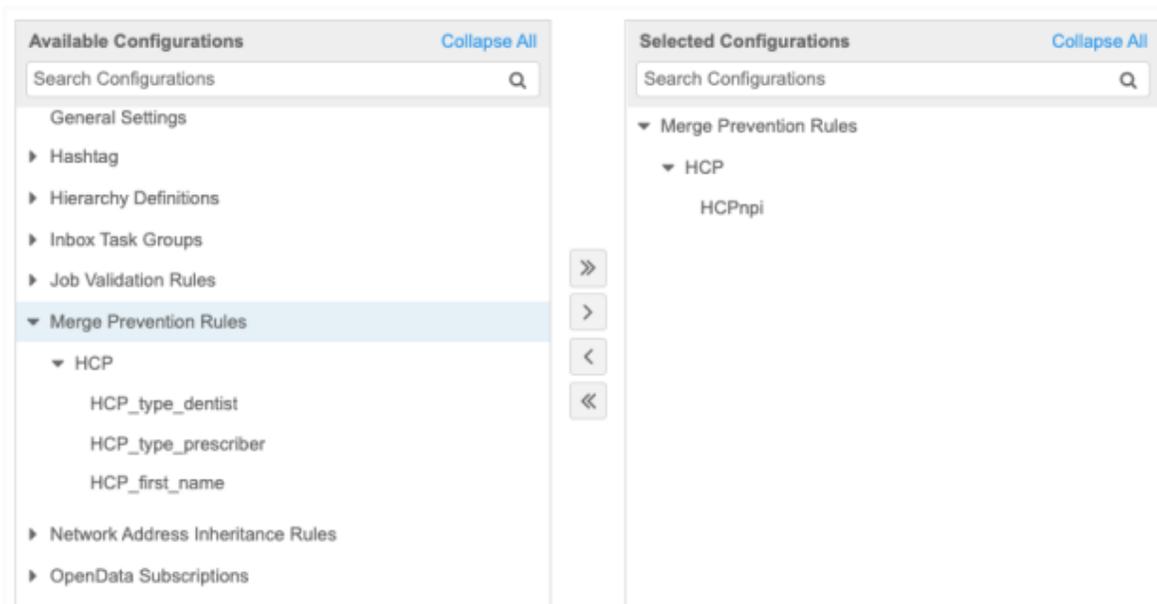
If a field is used in a rule and then it is disabled, the rule will no longer apply. When you view the rule from the Rules for Merge Prevention and Data Partitioning page, the field displays in the **Field** column; however, if you open the rule, the field no longer displays in the configuration; a new field must be selected for the rule.

This behavior is the same for disabled reference values.

Managing configurations

You can export the rules in a configuration package and import them to a target environment. For example, you might want to test the rules in Sandbox and then export to them to your Production instance.

The rules are located in the **Merge Prevention Rules** category in the Export Package configuration.



For more information about creating export packages, see [Managing configurations](#) in the *Veeva Network Online Help*.



Source subscriptions

MATCH RULE COLLECTIONS

23R1

Match rule collections are now supported for source subscriptions.

Administrators and Data Managers can configure match rules in a match rule collection and use it in multiple source subscription configurations. Often source subscriptions have common match configurations, but each source subscription had to be configured with its own match rules. Now, you can simplify match configurations by applying a match rule collection to any source subscription.

▼ Match Configuration

Select a match configuration mode to use

Use Match Configuration
Add country groups to this subscription to define a common set of match rules and data groups across multiple countries. If match configuration for a country have not been defined, default match configuration for the country is used (see [Match Default Configuration](#)

Use Match Rule Collection
Use a Match Rule Collection from a previously configured list

Select a Match Rule Collection

COLLECTION NAME	COUNTRIES	ENTITIES WITH CUSTOM RULES	SUBSCRIPTIONS USING THIS COLLECTION
> NA_match_rules	Canada, United States	Health Care Organization, Health Care Professional	1 Subscription

This enhancement is available by default in all new and existing source subscriptions in your Network instance.

Match configuration support

In a source subscription, the **Match Configuration** section now contains two options:

- **Use Match Configuration** - Define specific match rules for this source subscription. Default for new subscriptions.

The **Basic** and **Advanced** tabs display after the **Country Group** is defined.

If this option is selected and match rules are not defined, the default match configuration is used. This is previous behavior.

- **Use Match Rule Collection** - Use an existing match rule collection.

Match rule collections are created in **System Interfaces > Match Rule Collections**. For more information, see [Match rule collections](#) in the *Veeva Network Online Help*.



▼ Match Configuration

Select a match configuration mode to use

Use Match Configuration
Add country groups to this subscription to define a common set of match rules and data groups across multiple countries. If match configuration for a country have not been defined, default match configuration for the country is used (see [Match Default Configuration](#))

Use Match Rule Collection
Use a Match Rule Collection from a previously configured list

Country Group NorthAmerica Edit
[Delete](#)

Countries Canada, United States

Basic Advanced

Data Groups Match Rules

Data can be grouped or blocked to make the matching process more efficient by only comparing similar entities. For instructions on setting up Data Groups, please refer to the [online help](#).

Entity Health Care Professional

Key points

- A source subscription can use either a match rule collection or its own match configuration, but not a mix of both.
- You can switch between **Use a Match Configuration** and **Use a Match Rule Collection**.
- Defined match configurations will be preserved if you switch to **Use a Match Rule Collection**.

Use a match rule collection

1. Choose **Use Match Rule Collection**.

The section expands.



▼ Match Configuration

Select a match configuration mode to use

Use Match Configuration
Add country groups to this subscription to define a common set of match rules and data groups across multiple countries. If match configuration for a country have not been defined, default match configuration for the country is used (see [Match Default Configuration](#) )

Use Match Rule Collection
Use a Match Rule Collection from a previously configured list

Select a Match Rule Collection

COLLECTION NAME	COUNTRIES	ENTITIES WITH CUSTOM RULES	SUBSCRIPTIONS USING THIS COLLECTION
<i>No match collection selected</i>			

2. Click **Select a Match Rule Collection** to view the available match rule collections in a pop-up. If there are no match rule collections defined in your Network instance, a link, **Add Collection**, displays. Click the link to navigate to the Match Rule Collections page so you can create one.

In the **Add Collection** pop-up, expand a collection to review the details:

- **Collection name** - The name defined for the match rule collection.
Click the name to navigate to the match rule collection configuration.
- **Countries** - The countries where the match rule collection is applied.
If there are many countries in the match rule collection, hover over the row to see a tooltip with the complete list of countries.
- **Entities with custom rules** - Objects that have match rules defined in this collection.
- **Subscriptions using this collection** - Subscriptions where this match rule collection is applied.



Select a Match Rule Collection

Search by collection name... All Countries All Entities [Reset filters](#)

COLLECTION NAME	COUNTRIES	ENTITIES WITH CUSTOM RULES	SUBSCRIPTIONS USING THIS COLLECTION
> <input checked="" type="radio"/> NA_match_rules	Canada, United States	Health Care Organization, Health Care Professional	1 Subscription
<div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p>COUNTRIES</p> <ul style="list-style-type: none"> Canada United States </div> <div style="width: 30%;"> <p>ENTITIES WITH CUSTOM RULES</p> <ul style="list-style-type: none"> Health Care Organization (HCO) Health Care Professional (HCP) </div> <div style="width: 30%;"> <p>SUBSCRIPTIONS USING THIS COLLECTION</p> <ul style="list-style-type: none"> US_HCPs </div> </div>			
> <input type="radio"/> EU_match_rules	Denmark, Finland, France, Germany, Iceland, +5 more	Health Care Organization, Health Care Professional	3 Subscriptions

3. Select a match rule collection and click **Select**.
 Only one collection can be selected for each subscription configuration.
 The **Match Rule Collections** section is updated with the selected configuration.

Select a Match Rule Collection

COLLECTION NAME	COUNTRIES	ENTITIES WITH CUSTOM RULES	SUBSCRIPTIONS USING THIS COLLECTION
▼ NA_match_rules	Canada, United States	Health Care Organization, Health Care Professional	1 Subscription
<div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p>COUNTRIES</p> <ul style="list-style-type: none"> Canada United States </div> <div style="width: 30%;"> <p>ENTITIES WITH CUSTOM RULES</p> <ul style="list-style-type: none"> Health Care Organization (HCO) Health Care Professional (HCP) </div> <div style="width: 30%;"> <p>SUBSCRIPTIONS USING THIS COLLECTION</p> <ul style="list-style-type: none"> US_HCPs </div> </div>			

- Expand the collection to review the countries, entities, and associated subscriptions.
- Click the collection name to navigate to the match rule collection configuration.



Country validation

Network validates that the countries in the match rule collection are the same as the countries in an existing defined match configuration. If you switch between the two options and the countries are different, an alert displays.



- Click **Save** to save the source subscription with the different countries.
- Click **Cancel** to return to the subscription configuration and change the match configuration, if needed.

Source subscription view

The list on the Source Subscriptions page is updated to display the type of match configuration the subscription uses.

The **Match Configuration** column will contain one of the following values:

- **Defined Match Configuration** - Uses match rules that are defined in the source subscription configuration.
- **Match Rule Collections** - Uses a match rule collection. The match rule collection name displays as a link. Click the link to open the match rule collection configuration for more details

NAME	DATA SOURCE	TYPE	MATCH CONFIGURATION	SCHEDULE	LAST JOB TIME	LAST JOB S
Account_Update_NF	Alias	Data	Defined Match Configuration	Manual	Jul 27, 2019 @ 12:15 EST	✖ Failed
Associate_CRM_ID		Data	North American Match Rules Match Collection	Manual	Jul 24, 2019 @ 12:00 EST	✔ Complete
Associate_CRM_ID_2	VCRM	Data	North American Match Rules Match Collection	Manual	Jul 27, 2019 @ 12:15 EST	✔ Complete



Updates to Match Rule Collections

The Match Rule Collections page is updated to include the subscriptions where they are used. Expand each match rule collection to view its defined countries, entities, and subscriptions.

Match Rule Collections Add Collection

Use this page to set your own collections of match configuration that can be used by Match API. If match configuration for a country have not been defined, default match configuration for that country is used (see [Match Default Configuration](#)).

All Countries
All Entities
Reset filters

COLLECTION NAME	COUNTRIES	ENTITIES WITH CUSTOM RULES	SUBSCRIPTIONS USING THIS COLLECTION									
▼ NA_match_rules	Canada, Denmark, Finland, Germany, +8 more	Health Care Organization, Health Care Professional	2 Subscriptions									
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="font-size: 0.8em;">COUNTRIES</th> <th style="font-size: 0.8em;">ENTITIES WITH CUSTOM RULES</th> <th style="font-size: 0.8em;">SUBSCRIPTIONS USING THIS COLLECTION</th> </tr> </thead> <tbody> <tr> <td> Canada</td> <td>Health Care Organization (HCO)</td> <td>CA HCPs</td> </tr> <tr> <td> United States</td> <td>Health Care Professional (HCP)</td> <td>US HCPs</td> </tr> </tbody> </table>	COUNTRIES	ENTITIES WITH CUSTOM RULES	SUBSCRIPTIONS USING THIS COLLECTION	Canada	Health Care Organization (HCO)	CA HCPs	United States	Health Care Professional (HCP)	US HCPs		
COUNTRIES	ENTITIES WITH CUSTOM RULES	SUBSCRIPTIONS USING THIS COLLECTION										
Canada	Health Care Organization (HCO)	CA HCPs										
United States	Health Care Professional (HCP)	US HCPs										
> EU_match_rules	Denmark, Finland, France	Health Care Organization, Health Care Professional	3 Subscriptions									

Managing configurations

Administrators can include match rule collections in export packages to update target environments.

In the export package, expand the **Match Rule Collections** category and move them into the **Selected Configurations** pane.

When source subscriptions are included in an export package, any match rule collections applied to the subscription are added as a dependency so it is also exported.

⚠ Ensure that any required data model fields and custom objects referenced by the selected configurations are also selected for export; some items are not automatically added. [Learn more.](#)

Available Configurations Collapse All

- ▶ Hashtag
- ▶ Inbox Task Groups
- ▶ Job Validation Rules
- ▼ Match Rule Collections
- AL_loading
- AT_matching
- BA_loading
- BG_pharm_matching
- CH_registry

>>

>

<

<<

Selected Configurations Collapse All

No selected configurations



Integrations

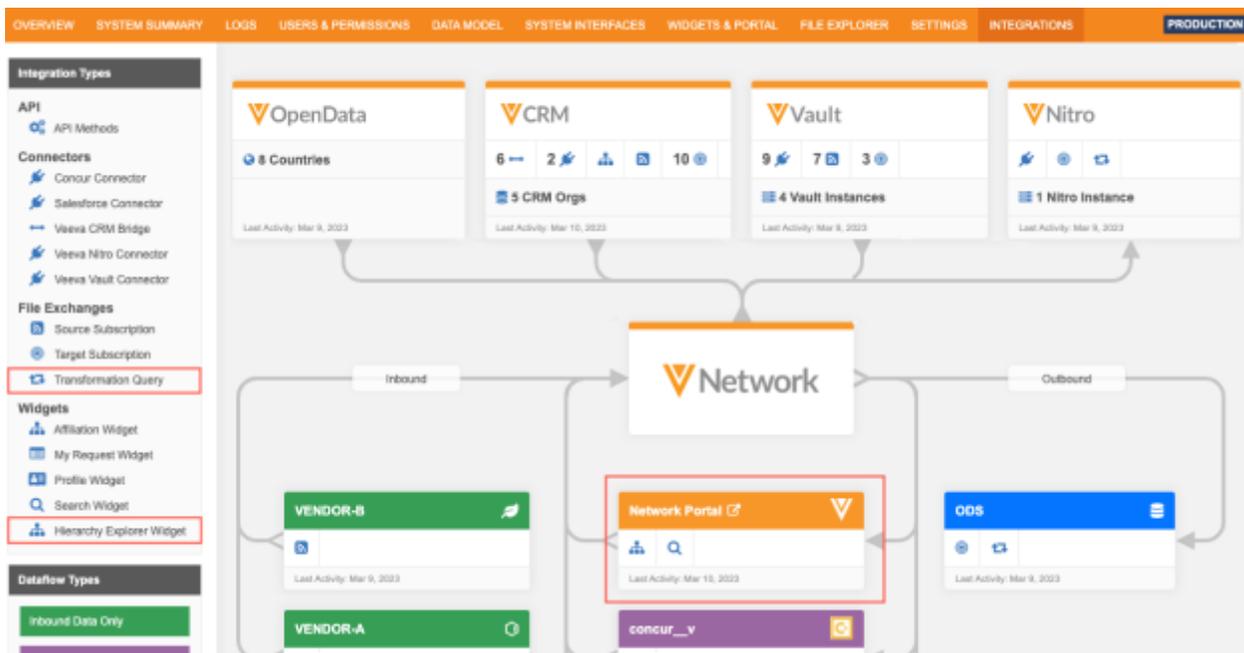
INTEGRATION DASHBOARD

23R1

The Integration dashboard provides a high level overview of applications that are integrated with Network.

In this release, the following enhancements have been made:

- **Network Portal** - Updated name and position on the dashboard. It includes a link to the portal.
- **Transformation queries** - A new icon  identifies applications where source and/or target subscriptions are transforming data.
- **Hierarchy Explorer widget** - A new icon  is added to identify the applications that are using the widget.



These enhancements are enabled by default in your Network instance.

Network Portal

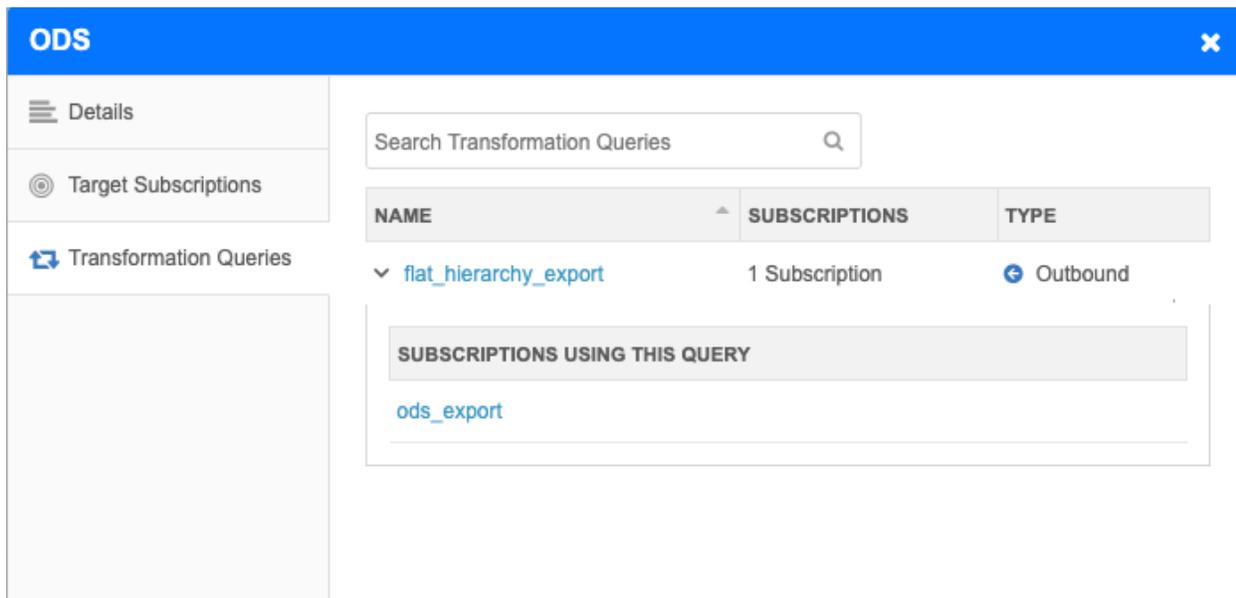
The Network Portal application is renamed (previously, it was `network_portal__v`) and the color of the application is changed to orange to indicate that it is a Veeva application. It is also repositioned directly under the Network application. Click the link in the header to launch the Network Portal directly from the Integration Dashboard.



Transformation Queries

A **Transformation Query** icon is added to the **File Exchanges** category in the **Integration Types** pane, The icon displays on applications that are using queries in source subscriptions or target subscriptions to transform data.

Click the application to open the details pop-up and then click the **Transformation Queries** tab.



Details

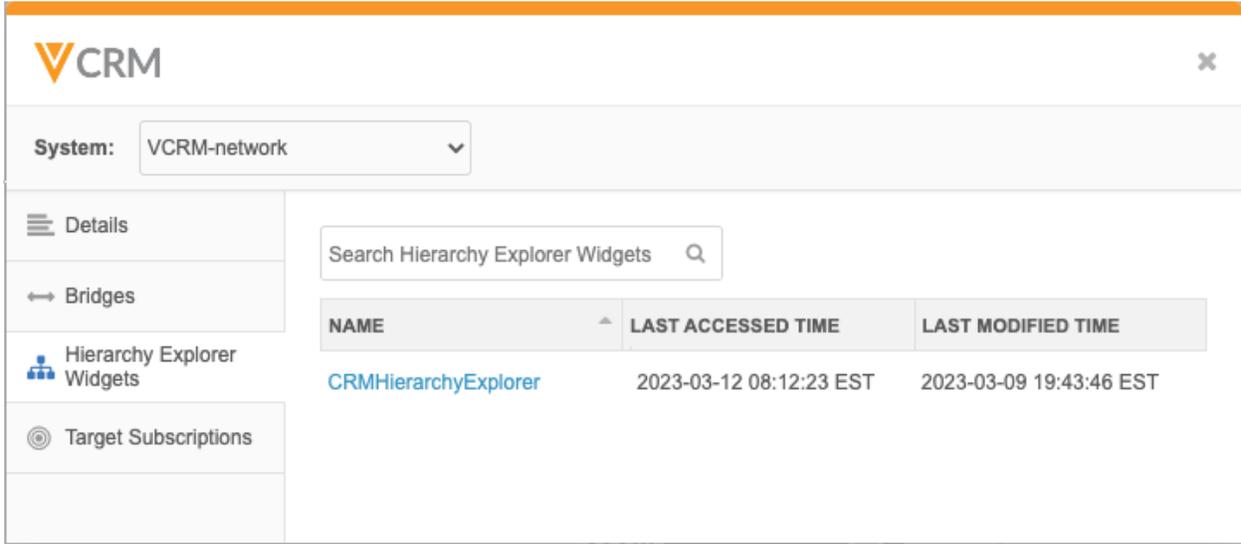
- **Name** - The name of the transformation query. Click the name to open the transformation query configuration in a new browser tab.
- **Subscriptions** - A count of the subscriptions that use this transformation query.
- **Type** - Indicates if the query is used to transform **Inbound** (source subscription) or **Outbound** (target subscription) data.
- **Subscriptions using this query** - A list of subscriptions that use the query. Click the subscription name to open the subscription configuration.



Hierarchy Explorer

A **Hierarchy Explorer**  icon is added to the **Widgets** category in the Integration Types pane. The icon displays on applications that are using the Hierarchy Explorer widget.

To learn more about the widget, click the application to open the details and then click the **Hierarchy Explorer Widgets** tab.



NAME	LAST ACCESSED TIME	LAST MODIFIED TIME
CRMHierarchyExplorer	2023-03-12 08:12:23 EST	2023-03-09 19:43:46 EST

Details:

- **Name** - The name of the Hierarchy Explorer applied to this application. Click the name to open the Hierarchy Explorer configuration.
- **Last Accessed Time** - The last time the widget was accessed by a user.
- **Last Modified Time** - The last time the Hierarchy Explorer widget configuration was changed.



NETWORK BRIDGE LICENSE FIELDS

22R3.1

In version 22R3.0, support was added for additional State license fields in the Network Bridge. Those license fields can now be imported to Veeva CRM through Network Account Search and through importing accounts during data change request processing.

Supported fields:

- **Collaborative Agreement Required** - Indicates whether a collaborative agreement (CA) is required for the HCP.
- **Comprehensive Prescriptive Authority** - Indicates if the HCP has any of the assessed conditions on their prescribing authorities.
- **Comprehensive Sample Eligibility** - Indicates if the HCP has any of the assessed conditions on their sample eligibility.
- **Controlled Substances Prescriptive Authority** - Indicates whether HCP is authorized to write controlled substances.
- **Controlled Substances Sample Eligibility** - Indicates if the HCP is authorized to receive controlled substance samples.
- **Grace Expiry** - License Expiration Date that includes the state grace period.
- **License Status Condition** - Additional information about the license status

This enhancement is available when Veeva CRM 22R3.2 is released in February 2022.

For more information about the fields, see [License mapping](#) in the *Veeva Network Online Help*.

Security

SINGLE SIGN-ON

22R3.1

The single sign-on configuration page is now enabled by default in Network instances. Previously, it was available only by request.

To access the single sign-on configuration:

- In the Admin console, click **Settings > SSO Settings**.

Administrators must configure the SSO settings for their Network instance.

For more details, see [Configuring single sign-on in Network](#) in the *Veeva Network Online Help*.



Admin settings

PERMISSION SETS

23R1

A permission set, **Notes Permission Set (Default)**, is added so Administrators can provide or restrict access to notes on record profiles and on data change requests.

Notes Permission Set (Default)

Cancel Save

Details

Name

Description

Status Enabled
 Disabled

Permissions

DCR CLEANUP

Reject tasks ?

Cancel tasks ?

Approve tasks ?

FIELD HELPER

View Field Helper on Profile ?

Manage Field Helper ?

NOTES

Configure user access to Notes in the following pages.

	VIEW	ADD	EDIT	DELETE
Profile Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Task Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The permission set is enabled by default in your Network instance.



Manage permissions for notes

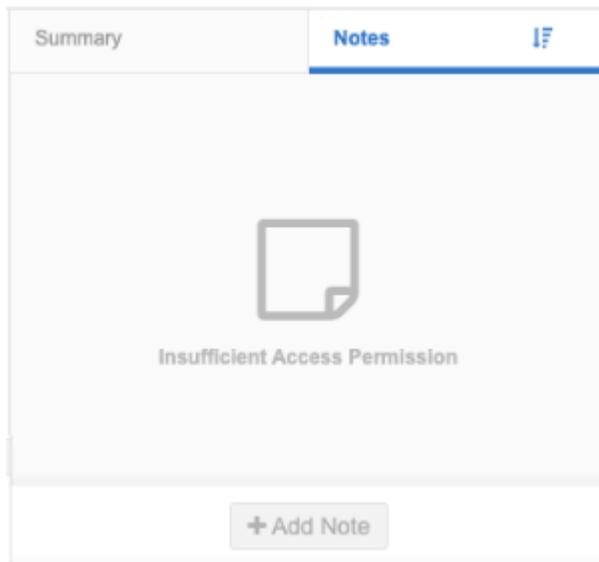
By default, all users (except Standard users and Integration users) have all permissions for notes enabled for the profile page and for inbox tasks.

To update permissions for users or user groups:

1. In the Admin console, click **Users & Permissions > Permission Sets**.
2. Click the **Notes Permission Set (Default)** to open it.
3. In the **Notes** section, there are two headings:
 - **Profile Notes** - Notes on the profile page.
 - **Task Notes** - Notes on add and change requests.
4. For each heading, you can select the following permissions:

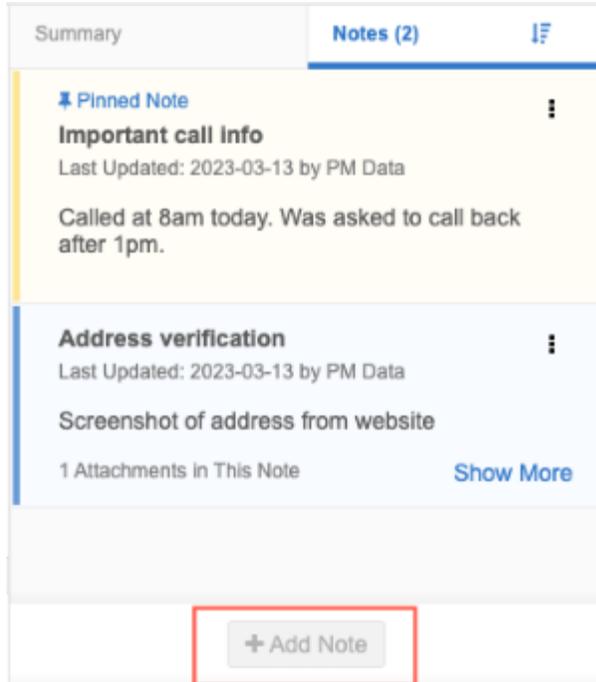
- **View** - Allow users to view notes.

If this permission is not selected, users can access the **Notes** tab but they will see the following message: `Insufficient Access Permission`.



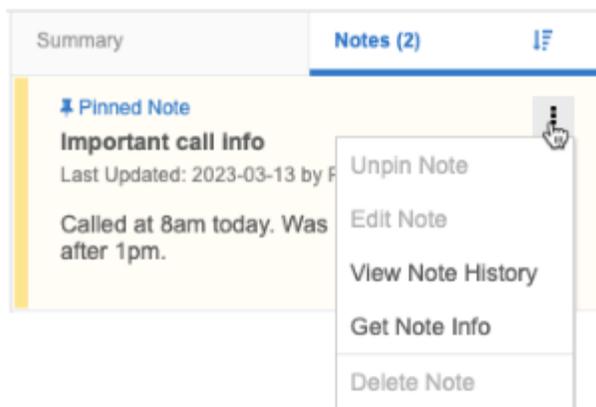
- **Add** - Allow users to add notes. If users have **Add** access, they also have **View** access by default.

If this permission is not selected, users can view notes, but the option to add notes is dimmed.



- **Edit** - Allow users to edit notes and pin/unpin notes.
- **Delete** - Allow users to delete their own notes and notes created by other users.

If the **Edit** permission or the **Delete** permission is not selected, they are dimmed in the **Options** menu.



Administrators can add user groups or individual users to this permission set to manage access to profile notes and task notes in their Network instance. You can also create a new permission set to manage note access for specific users or user groups.

For more information about creating and managing permission sets, see [Permission Sets](#) in the *Veeva Network Online Help*.



AMAZON S3 SUBFOLDER SUPPORT

23R1

Administrators can now successfully test the connection to write to an Amazon S3 bucket subfolder when Network does not have access to the root bucket. Previously, an error occurred on the Amazon S3 credential configuration if you tried to test the connection to a subfolder.

verteo-bucket-credential Cancel Save

⚠ Before creating the Amazon S3 credential, complete the following steps in your AWS account:

1. Create a S3 bucket.
2. Create an IAM role for Network to use to connect to the S3 bucket.
3. Create a policy for the S3 bucket.

Generate Trust Relationship Statement

Type Amazon S3

Name

Role ARN

S3 URI

S3 Region

Test Connection

● Connection Successful
Connection Last Tested: 2023-03-01 14:33:18 EST

This enhancement is enabled by default in your Network instance.

Logs

Each time a user clicks the **Test Connection** button or a job saves to an Amazon S3 subfolder, an event is created in the System Audit Log.



ExternalCredential verteo-bucket-credential41] ✕

Event ID 942331209385774239

Event Description Upload

Property test_connection

Property Name verteo-bucket-credential[41]

New Value	Old Value
s3:/verteo-bucket/veevanetwork/veevanetwork_test_connection_307_2023030111331877	

To test the connection to a subfolder, a simple file is dropped into the bucket. The file is timestamped with the Network instance and path.

API

VERSION UPDATE

23R1

The Network API is updated to v29.0.

The Network API version is updated for every major release. Any additional changes are documented in this section of the Release Notes.

As with all version updates, Integration Users should continue to use v28.0 until there is a change for v29.0 that they want to apply.

For more information about the Network API, see the *Veeva Network API Reference* at <http://developer.veevanetwork.com>.