



# veeva Network

Veeva Network 21R1.0.1 Release Notes

April 2021



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## About these Release Notes

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These Release Notes describe all features that will be included in Veeva Network 21R1.0.

### SUBSCRIBE TO RELEASE NOTIFICATIONS

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

- **Software releases and maintenance** - Go to [trust.veeva.com](https://trust.veeva.com). 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** - PDF files are posted on the [Veeva Support](#) website. To be notified when new documents are published, click the **Follow** button on that page or the [Announcements](#) section in the Network Community.

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

## Browser requirements

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These are the minimum browser requirements for Veeva Network:

- Google Chrome™ (most stable version at Network release)
- Safari® 10+
- Microsoft Edge™

Veeva Network is not supported on mobile devices.

## Release Note updates

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### Enhancements - Added

The following enhancement has been added to this release since the Early version was published:

- **Geo Subdivision subscriptions** - The Geo Subdivision 2 subscription is available for France and Monaco.

### Enhancements - Removed

The following enhancement has been removed from this release since the Early version was published:

- **Loading relationships** - Parent HCOs will be dropped or rejected in source subscriptions if the related entity is not Valid record state.

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 21R1.0 major release.

			ST	DS	DM	AD
<b>General updates</b>						
Performance improvements	The page loading times have been improved in several areas of the Admin console.	21R1.0			●	●
HCO icons	New icons have been added for HCOs to help you easily differentiate the HCO types.	20R3.1	●	●	●	●
<b>Network Portal and widgets</b>						
My Request widget	Business users can use the My Request widget in the Network Portal to track the status of requests that they've submitted.	21R1.0	●	●	●	●
Affiliation widget branding	The Affiliation widget now provides the ability to customize the Influence Map branding so you can distinguish object types and highlight relationship details.	21R1.0	●	●	●	●
Search widget	Record profile sections that contain no field values are automatically collapsed.	21R1.0	●	●	●	●
Network Portal	The Network Portal provides a way for business users to access Network data through an easy and intuitive user experience.	20R3.1	●	●	●	●
Affiliation widget availability	The Affiliation widget is now generally available.	20R3.1	●	●	●	●
Affiliation widget views	The Affiliation widget now supports creating multiple views to provide more control and flexibility for your Influence Maps.	20R3.1	●	●	●	●
Affiliation widget relationship details	You can provide additional details about HCP-HCO and HCO-HCO relationships.	20R3.1	●	●	●	●
Affiliation widget HCO metrics	You can now see metrics displayed for HCO objects.	20R3.1	●	●	●	●
Search widget	Administrators can define specific layouts for add requests.	20R3.1	●	●	●	●



			ST	DS	DM	AD
<b>Profiles</b>						
View additional affiliations	The profile page now displays affiliations that haven't been downloaded from OpenData.	21R1.0	●	●	●	●
Data privacy opt out date	A field has been added to capture the date that the HCP record was opted-out.	20R3.1	●	●	●	●
<b>Inbox</b>						
Add requests	Add requests now contain a link to a related suspect match task.	21R1.0		●	●	
Suspect match	Field value buttons will be hidden or dimmed on tasks that do not need to be processed for specific scenarios.	21R1.0		●	●	
<b>Data model</b>						
Geocodes	Geocodes are now available for addresses in Spain.	21R1.0			●	●
Cluster management	This feature now supports IQVIA cluster data for Spain.	21R1.0			●	●
New country	A data model has been added for Singapore (SG).	20R3.1			●	●
Formatted name	The formatted name formula is updated for several European countries.	20R3.1			●	●
<b>Data maintenance</b>						
Delete custom object records	Custom object records can be deleted from your Network instance.	21R1.0			●	●
Restrict access to unsubscribed HCPs from Search against OpenData	Administrators can now prevent users from searching and downloading HCPs that have been unsubscribed from OpenData.	20R3.1			●	●
<b>Source rankings</b>						
Network Portal	The Network Portal system cannot be included in the source rankings.	21R1.0			●	●



			ST	DS	DM	AD
<b>Veeva OpenData subscriptions</b>						
Update all existing records	A new option enables you to reset your subscription by downloading all records that you have subscribed to.	21R1.0			●	●
Request targeted record updates	Veeva OpenData can now export updates for specific HCPs or HCOs to your Network instance	21R1.0			●	●
Geo Subdivision subscriptions	The Geo Subdivision 2 subscription is available for France and Monaco.	21R1.0			●	●
<b>Match</b>						
Match to opted-out records	Administrators can now choose to include opted-out HCP records in matching for incoming records from add requests and source subscriptions.	21R1.0			●	●
<b>Target subscriptions</b>						
Export all objects	Administrators can choose a new setting that automatically exports all objects.	21R1.0			●	●
DCR exports	DCR exports can now include the master key of the parent HCO.	21R1.0			●	●
<b>Users</b>						
Integration User	Administrators can now provide Integration Users with additional permissions for the metadata API.	21R1.0			●	●
Users page	Administrators can now quickly find user profiles by filtering the Users page by status or user type.	20R3.1			●	●
New user type	A new user type, Portal User, enables administrators to provide access to the Network Portal only.	20R3.1			●	●
System managed groups	Network now provides a number of system managed groups based on user type, status, and security policy.	20R3.1			●	●
User group improvements	Enhancements have been made to user groups to help you find and select groups.	20R3.1			●	●
<b>Admin settings</b>						
External Credentials	The Test Connection button provides more information about the credential environments.	20R3.1				●



			ST	DS	DM	AD
<b>Network integrations</b>						
Veeva Connector - CRM Upsert	Custom keys can now be generated when new records are created in Salesforce™ using the CRM Upsert Connector.	21R1.0				●
Network Bridge	Merged_Into addresses that were associated to DEA licenses are now deleted in Veeva CRM.	20R3.1				●
<b>API</b>						
Version update	The Network API is updated to v23.0.	21R1.0		Developers		
Metadata API	A new value for the countries parameter enables Integration users to retrieve metadata access to all enabled fields for all countries.	21R1.0		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.



## General updates

### PERFORMANCE IMPROVEMENTS

21R1

Administrators and Data Managers will see noticeable improvements in the page loading times for the following Network UI pages:

- List of Job Triggers page
- Target subscription page and individual configuration pages
- Network Bridge page and individual configuration pages

In addition, the **Job Triggers** sections on subscription configurations now load more quickly.

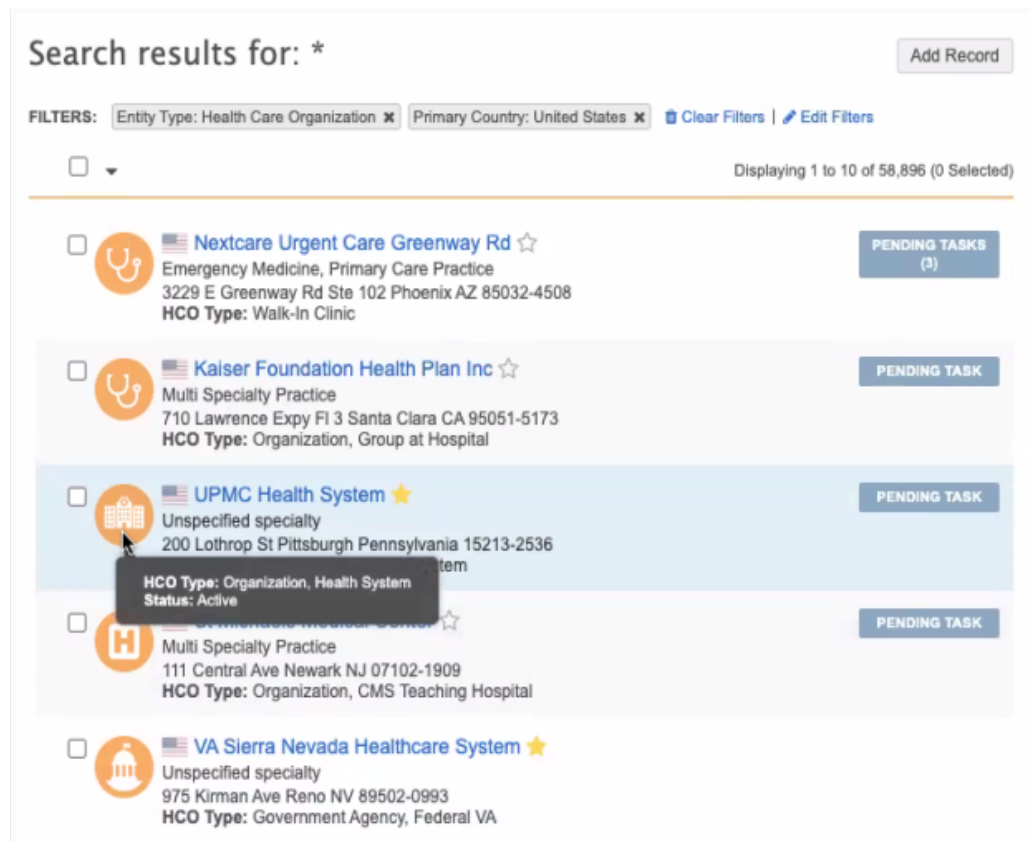
These enhancements are enabled by default in your Network instances.

### HCO ICONS

20R3.1

Ten new icons have been added for HCOs to help you easily differentiate HCO types. For example, the new icons will help you to identify an HCO from search results when HCOs have the same name but different types. The icons are used for all record owner types (local, Veeva OpenData, third party data providers) and all record states.

These new specific HCO icons will be used throughout the Network UI, the Network Portal, and Network widgets. They are enabled by default.











### Icon mapping to HCO type

For consistency, the new icons are the same icons that are used in Veeva CRM. Only the new Health System icon is different because it is specific to Network.

HCO Type		HCO Type Name	Reference Code
<b>Distributor</b>		Distributor, Medical Equipment	6:2
		Distributor, General	6:1
<b>Extended Care</b>		Organization, Nursing Home / Long Term Care	4:8
		Organization, Residential Facility	4:31
		Organization, Hospice	4:41
		Organization, Other Residential Long-Term Care Facilities	4_95
<b>Government Agency</b>		Government Agency, General	26:1
		Government Agency, Health Department	26:4
		Government Agency, Federal Military	26:9
		Government Agency, Federal VA	26:13
		Government Agency, Federal Indian Health Service	26:12
		Government Agency, EMS Department	26:7
		Government Agency, State Medicaid Program	26:2
<b>Group Practice</b>		Walk-In Clinic	4:44
		Organization, Clinic	4:5
		Organization, Dept at Clinic	4_55
		Organization, Group Practice	4:4
		Organization, Group at Hospital	4:2
		Organization, PHS Outpatient	4:42
		Organization, Chiropractic Group	4:25
		Organization, Podiatry Group	4:27
		Ambulatory Surgery Center	45_1
		Organization, Alternative Medicine Group	4:26
		Organization, Occupational Therapy Group	4:28
<b>Health Systems</b>		Organization, Health System	4:37



HCO Type	HCO Type Name	Reference Code
<b>Hospital</b> 	Organization, Hospital	4:6
	Organization, CMS Teaching Hospital	4:35
	Hospital, Mental Health	32_23
	Hospital, General Hospitals	32_22
	Mental Health Hospital	1_7
	Children's Hospital	1_3
<b>Hospital Department</b> 	Organization, Dept at Hospital	4:1
<b>Institution</b> 	Education Establishment	4:12
	Residency Program, Residency	15:1
	Medical School, General	14:1
	Medical School, Other	14:98
<b>Laboratory</b> 	Organization, Lab	4:10
	Imaging Center	4:88
<b>Pharmacy</b> 	Pharmacy, Retail	11:1
	Pharmacy, Other	11:98
	Pharmacy, Home Health	11:3
	Pharmacy, Hospital	11:2
	Pharmacy, Long Term Care Pharmacy Provider	11:5
	Pharmacy, Specialty Pharmacy	11:10
	Pharmacy, Compounding Pharmacy	11:12
	Pharmacy, Mail Order Pharmacy	11:4
	Pharmacy, Other Specialty Clinic	11:97
	Pharmacy, Pharmacy Benefit Mgmt Org	11:6
	Pharmacy, Oncology Specialty Pharmacy	11:7
	Pharmacy, Retail Sellers and Suppliers	11:96
	Pharmacy, Corporate Office	11:99
<b>Other</b> 	All other HCO types will retain the current Network HCO icon.  This includes custom HCO types and HCO's that have no HCO type value.	





### HCO icon use in the Network UI

The HCO type icons display wherever icons are used in the Network UI; for example, on record profiles, search results, the inbox, Network Explorer, Recent items, and so on.

**Note:** Any HCOs that were in your **Recent Items** before this release will continue to display the standard HCO icon until you reopen the record.

### Examples

#### Record profiles

The HCO type icon is visible on the header, the Hierarchy preview box, and the Parent HCO affiliation and Child Affiliation sections of HCO profiles. These icons help provide more information about the record. These HCO type icons are also available on HCP profiles in the Parent Affiliations section.

**Sutter Health** ☆  
FULL ADDRESS 2200 River Plaza Dr Sacramento CA  
Organization, Health System, Unspecified specialty

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

▼ Child Affiliations (153)

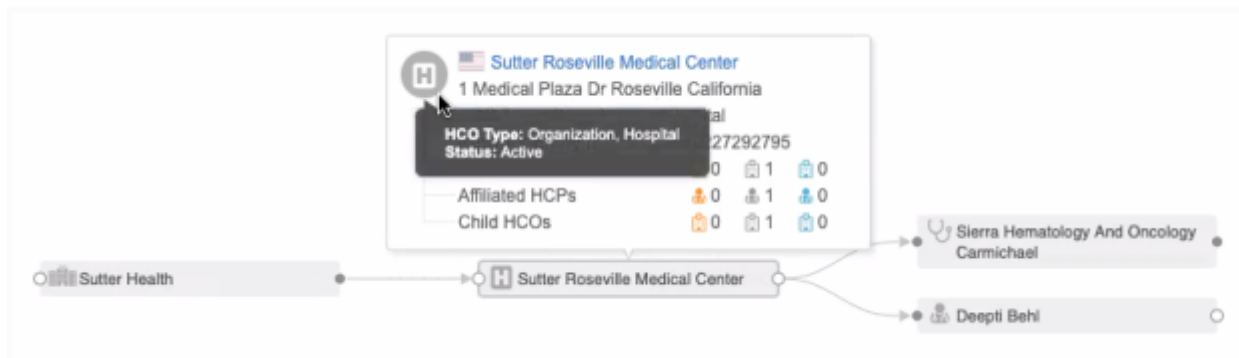
HEALTHCARE ORGANIZATIONS (HCO)

- Acute Care Surgery Medical Group Inc** [↗](#)  
2800 L St Ste 200 Sacramento CA  
HCO TYPE Organization, Group Practice  
HIERARCHY TYPE Operating/Ownership Hierarchy
- Alice Reier MD Office** [↗](#)  
3300 Webster St Ste 900 Oakland CA  
HCO TYPE Organization, Group Practice  
HIERARCHY TYPE Operating/Ownership Hierarchy
- Alta Bates Summit Medical Center** [↗](#)  
350 Hawthorne Ave Oakland CA 94609  
HCO TYPE Organization, Hospital  
HIERARCHY TYPE Operating/Ownership Hierarchy
- Alta Bates Summit Medical Center Alta Bates Campus** [↗](#)  
2450 Ashby Ave Berkeley CA  
HCO TYPE Organization, Hospital  
HIERARCHY TYPE Operating/Ownership Hierarchy
- Alta Bates Summit Medical Center Hematology Oncology** [↗](#)  
350 Hawthorne Ave Oakland CA  
HCO TYPE Organization, Dept at Hospital  
HIERARCHY TYPE Operating/Ownership Hierarchy



## Network Explorer

The HCO type icons can help you to see the hierarchy.



### HCO icon use in Network widgets

The new icons are supported in the widgets that are used in the Network Portal and widgets that are embedded in other applications.

### Example

#### Search widget

Using the icons, you can differentiate between different types if your results include many HCOs with the same name.

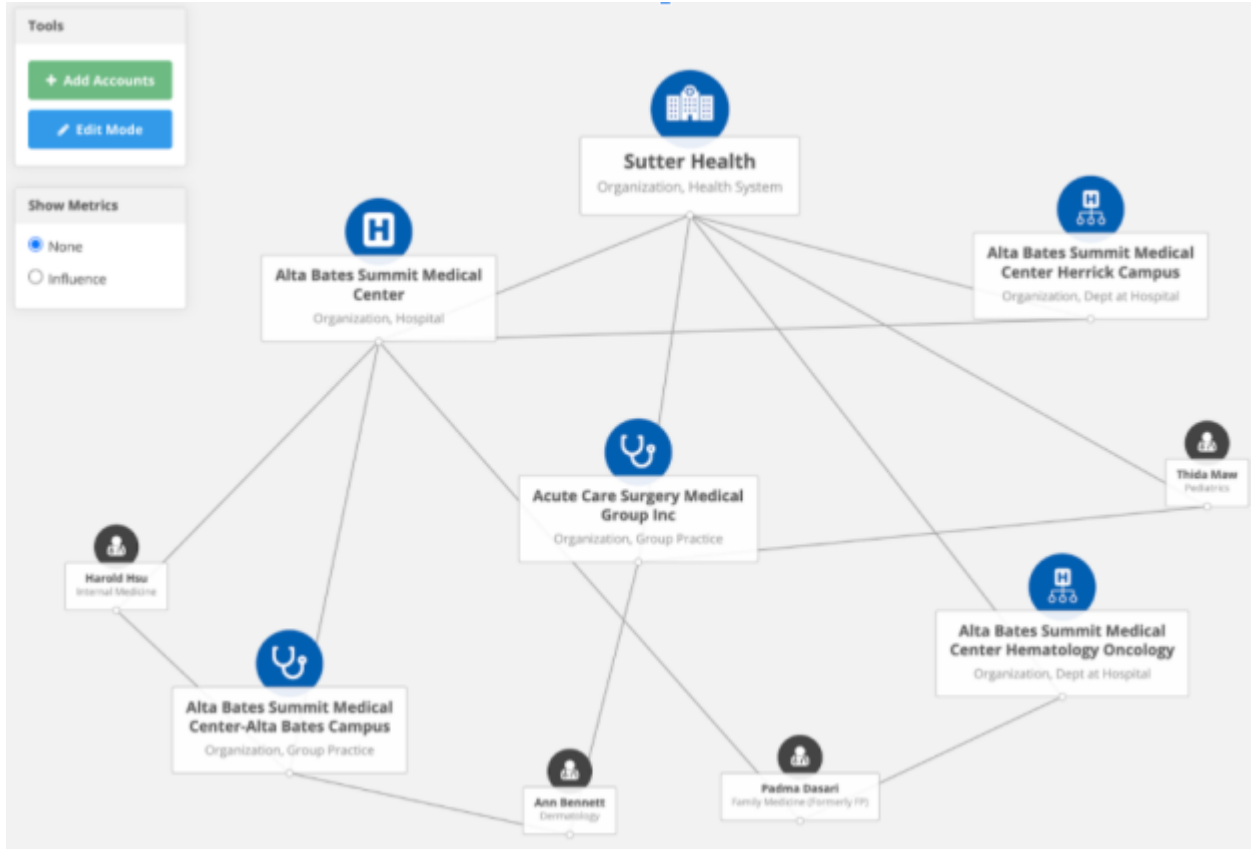
The screenshot shows a 'Search Accounts' widget. It displays 17 search results for Health Care Organizations. Filters are set to 'Country: United States' and 'Corporate Name: alta bates'. The results list includes:

- Alta Bates Summit Medical Center Alta Bates Campus (Organization, Hospital) - 2450 Ashby Ave Berkeley CA
- Alta Bates Summit Medical Center-Alta Bates Campus (Organization, Group Practice) - 1000A Magnolia Ave Larkspur CA 94939-1016
- Alta Bates Summit Medical Center Alta Bates Campus (Organization, Hospital) - 2450 Ashby Ave Berkeley CA 94705-2067
- Alta Bates Summit Medical Center-Alta Bates Campus (Organization, Group Practice) - 100 Park Pl Ste 200 San Ramon CA 94583-4416



### Affiliation widget

The icons are used in the Affiliation widget to help visualize the HCO types on the Influence Map, add accounts, and profile page.



### Tooltips

Hovering over the icon displays the HCO type and the record state or status to match the badge displayed on the icon. This could include the Privacy Opt-Out or Candidate Record indication.

### Examples



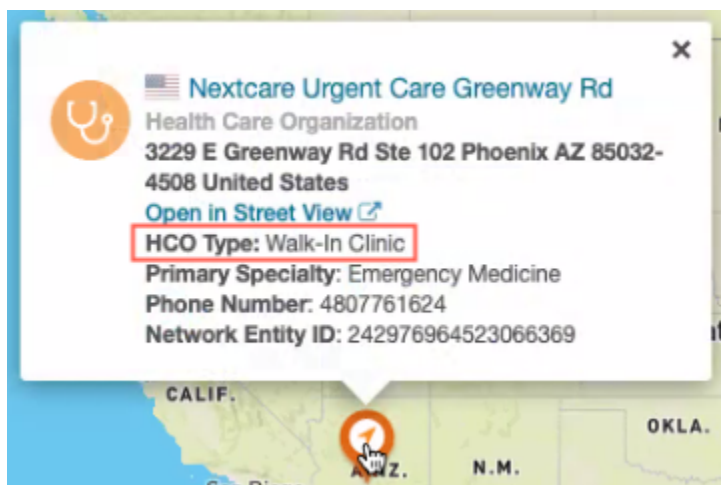


### *Displaying the HCO type*

The HCO type now displays on record profiles, in search results, and in business cards throughout the Network UI.

#### **Example**

The HCO type displays on the business card on the search map by default.





## Network Portal and widgets

### MY REQUEST WIDGET

**21R1**

A new Network widget is available so business users can view the data change requests that they've submitted. Administrators can configure the My Request widget in their Network instance and add it to a Network Portal application so all users, except Integration Users, can check the status of their requests without logging into Network.

The screenshot shows the 'My Request Status' widget in the Network Portal. The widget has a search bar and filters for 'All Types' and 'All Statuses'. The table below shows the following data:

NAME	TYPE	REQUESTER COMMENTS	SUBMIT DATE	STATUS
Alai Alvarez	Change	changing primary address	March 5, 2021	Pending Review
John Middle	Add	new doc	March 5, 2021	Pending Review
John New	Change	New address	March 5, 2021	Pending Review
Newie Nurse	Change	New Nurse Practitioner in HCO	March 5, 2021	Partially Accepted
Francis Ferenz	Add	adding Dr Ferenz from my hospital	March 3, 2021	Pending Review
Jefferson Hills Surgical Associates PC	Change	new work place	March 3, 2021	Pending Review
New Doc	Add	add new boston doc. he just graduated from boston u	February 26, 2021	Pending Review
John New	Change	test	February 23, 2021	Accepted
New Person	Add	adding new person	February 1, 2021	Rejected
John New	Change		February 1, 2021	Pending Review

Displaying 1 - 10 of 27 Results. Show 10 / 1 / 3

The My Request widget configuration is available by default in Network instances. Administrators can create a widget and add it to a Network Portal application.

### Viewing requests

The main page of the My Request widget displays all of your submitted requests.

Each request displays the following information:

- **Type** - Add or Change request
- **Requester Comments** - Notes that you added to the request.
- **Submit Date** - The date you sent the request
- **Status** - The task status (Accepted, Partially Accepted, Pending Review).

The list can be filtered by the **Type** and **Status** columns or you can click **Sort by Date** to sort the list by the **Submit Date** column. Use the search field to search for a specific request.

**Note:** Requests submitted through the Affiliation widget do not display.



## Request details

Click a request to view details about the status, requester comments, and resolution notes.

My Requests

[← Back to My Requests](#)

Add Request

✔ Processed

**Paula Brown**

VID 936424174734083679

DCR ID 936379682335886495

DATE CREATED 2020-04-14T10:41:43.000-07:00

DATE RESOLVED 2020-04-22T07:20:34.000-07:00

**REQUESTER COMMENT** Paula is new HCP

**RESOLUTION NOTES** [1] Accepted 10, modified 0 and rejected 0 of 14 changes.  
[2] System rejected - You

	Requested Value	Final Value	
<b>First Name</b>	Paula	Paula	✔ Accepted
<b>Last Name</b>	Brown	Brown	✔ Accepted
<b>HCP Type</b>	Prescriber	Prescriber	✔ Accepted
<b>Degree 1</b>		Acupuncture Detoxification Technician	✔ Added
<b>Specialty 1</b>		Acupuncture	✔ Added
<b>Gender</b>		Female	✔ Added
<b>Address (211 Tomkin Road New Jersey)</b>			
<b>Address Line 1</b>	211 Tomkin Road		✘ Rejected
<b>City</b>	New jersey		✘ Rejected
<b>Address Line 3</b>			✘ Rejected
<b>Address Line 2</b>			✘ Rejected
<b>Zip/Postal Code</b>			✘ Rejected
<b>Country</b>			✘ Rejected
<b>Super Admin Area</b>			✘ Rejected

On processed requests, you can review the results of the DCR line items. You can see your original requested value and any values that were changed by Data Stewards.



## My Requests

[← Back to My Requests](#)

### Change Request ✓ Processed

<b>John New</b> <b>VID</b> 936828960076990047 <b>DCR ID</b> 937443282569006239 <b>DATE CREATED</b> 2020-10-19T06:49:15.000-07:00 <b>DATE RESOLVED</b> 2020-10-19T06:54:46.000-07:00	<b>REQUESTER COMMENT</b> added place of employment	<b>RESOLUTION NOTES</b> [1] HCP added as requested
---	--	--

	Previous Value	Requested Value	Final Value
Place of Employment		Federal Government-Hospital Air Force	Federal Government-Hospital Air Force <span>✓ Accepted</span>

### Matched records

If you submit an add request and it matches to an existing record, a message displays at the top of the request to advise that your add request has become a change request.

## My Requests

[← Back to My Requests](#)

### Change Request ✓ Processed

**i** The record you added has been matched with an existing record. Your add request has been changed to a change request.

<b>Newie Nurse</b> <b>VID</b> 938220205799835231 <b>DCR ID</b> 938220109596789919 <b>DATE CREATED</b> 2021-03-05T10:26:35.000-08:00 <b>DATE RESOLVED</b> 2021-03-05T10:51:14.000-08:00	<b>REQUESTER COMMENT</b> New Nurse Practioner in HCO	<b>RESOLUTION NOTES</b> [1] HCP added as requested [2] System Rejected - You are trying to ..
--	--	--

	Requested Value	Final Value	
AMA Do Not Contact?	No/False	No/False	<span>✓ Accepted</span>
AOA ID	21314	21314	<span>✓ Accepted</span>
Test Field	default value test	default value test	<span>✓ Already Applied</span>
Fellow	No/False	No/False	<span>✓ Accepted</span>
First Name	New	Newie	<span>🔄 Modified</span>
Gender	Male	Male	<span>✓ Accepted</span>
Grad Training?	No/False	No/False	<span>✓ Accepted</span>
Status	Active	Active	<span>✓ Accepted</span>



### View a record profile

If a processed request has become a record, you can click the name on the record to open the profile.

The screenshot shows the 'My Requests' interface. On the left, a request card for Paula Brown is shown with a 'Processed' status. The card includes fields for VID, DCR ID, DATE CREATED, and DATE RESOLVED. Below the card is a table of 'Requested Value' with columns for field names and values.

Requested Value	
First Name	Paula
Last Name	Brown
HCP Type	Prescriber
Degree 1	
Specialty 1	
Gender	

On the right, the profile for Paula Brown is displayed. It includes a header with her name and role, followed by a 'Primary Information' section with various fields and values.

Primary Information	
Name	OpenData Data Privacy Opt Out Date
Paula Brown	No value
HCP Type	Degree 1
Business Professional	Acupuncture Detoxification Technician
Degree 2	Primary Specialty
No value	Acupuncture
Other Specialties	Primary Specialty Group
No value	No value
Status	Gender
Active	Female

**Tip:** To display only the relevant information for business users, administrators can configure the widget to use a reduced profile layout by defining a custom layout in the widget configuration.

### Configure the My Request widget

To add a My Request widget:

1. In the Admin console, click **Widgets & Portal > Network Widgets**.
2. Click **Add Network Widget**.
3. In the **New Network Widget** dialog, select **My Request Widget** from the list.
4. Click **Create Widget**.  
The New My Widget page displays.
5. In the **Details** section, define the following information
  - a. **Name and Description**.
  - b. **System** - Select a source system.
  - c. **Type** - **My Request Widget** is selected by default.
  - d. **Widget Enabled** - **Yes** is selected by default.





## MyRequests

[Cancel](#) [Generate Code](#) [Save](#)

▼ **Details**

Name  System

Code  Type

Widget Enabled  Yes  No

Description

▼ **General Settings**

**AUTHENTICATION**

List the domain names of the external web sites that will host this widget.

Domain

[+ Add Domain](#)

6. In the **General Settings** section, define the domain and behavior for your widget.
  - a. **Authentication** - Domain name for the internal website that will host the widget. To use the widget in the Network Portal, add `*.veevanetwork.com`.
  - b. **Languages** - Any languages that should display in the widget. English is defined by default.
  - c. **Profile Layout** - Determine which layout to use for viewing profiles.

Typically, the layouts assigned to the user's data visibility profile contain all of the fields in the Network data model. You can override this default behavior and assign specific profile layouts for each country to the widget. For example, you can use custom profile layouts to limit the number of fields so widget users only see the essential fields.

**Choose one of the following options:**

- **Use the DVP of the user** - Typically, the layouts assigned to the DVP contain all of the fields in the Network data model.
- **Override the DVP and assign a specific profile layout** - Use a custom profile layout.

If you choose this option, define the **Country** and profile layouts for HCPs and HCOs.



**PROFILE LAYOUT**

Manage the profile layout used for viewing profiles. To create or edit an existing layout, go to the [Profile Layouts](#) page.

Use the Data Visibility Profile (DVP) of the user to determine the profile layout  
 Override the Data Visibility Profile (DVP) and assign a specific profile layout

Country	HCP Profile Layout	HCO Profile Layout	
2 items selected	WidgetLayoutHCP	WidgetsLayoutHCO	X
2 items selected	NAStandard	NAStandard	X

[+ Add Country Layout](#)

**Important:** If you override the layout to display a limited set of fields in record profiles, it also impacts that fields that display in their requests. If the field isn't included in the layout, it will not display in the request.

- d. Use the **Branding** section to customize the look of the widget.
  - a. **Widget header**- Choose whether your widget should display a header. For the Network Portal, a header is not required.  
  
By default, a header is not included so the widget displays seamlessly into your internal portal. If you include a header, you can add a custom logo and title.
  - b. **Images** - If you choose to include a header, upload a logo to add to the widget.  
  
Image files in .JPG and .PNG formats are supported. The image name cannot contain spaces. The image file will be automatically resized to fit in the appropriate space. The maximum height and width is 24px by 24px.  
  
The uploaded image displays in the **Preview** section.
  - c. **Fonts** - Choose the font family to be used in the widget. By default, **Open Sans** is selected.
  - d. **Colors** - Customize the colors for your widget.
    - **Link Color** - Used for all links. Default, #3A78BB
    - **Icon Color** - Used inside the HCP and HCO icons. Default, #FFFFFF
    - **HCP Icon Color** - The default icon color for HCPs when a metric is not selected. Default, #444444
    - **HCO Icon Color** - The default icon color for HCOs when a metric is not selected. Default, #005FB1
7. In the **Labels** section, define the **Widget Title** -The languages that you defined for the widget are listed. If you chose to have a widget header, type the **Widget Title** label for each language.  
  
By default, the title is **Network My Request**. It can be a maximum of 80 characters.
8. **Save** your changes.

The My Request widget can be added to a new or existing application in your Network Portal so users with access to the Network Portal can view their DCR requests. For detailed instructions, see [Network Portal administration](#) in the *Veeva Network Online Help*.



## AFFILIATION WIDGET BRANDING

21R1

The Affiliation widget now provides the ability to customize the Influence Map branding so you can distinguish object types and highlight relationship details. This enables you to visualize specific business information; for example, to differentiate HCO types and business professionals from other HCP types, or to better understand the patient journey in the health system.

These enhancements enable you to do the following:

- Override existing icon mappings and color branding.
- Customize relationship details such as labels and colors
- Use new Influence Map tools to filter on relationships

These enhancements are not enabled by default. To add custom branding for objects and relationships, contact Veeva Support.



### Custom branding examples

Review the following example to see how you can customize the objects and relationships to your specific business purposes. The examples provide the type of mapping details that will be required by Veeva for creating the custom branding.



### Customize icons and colors for HCOs

Custom HCO branding can be created for the Affiliation widget where the icon and color can be configured.

You might want to customize the HCOs that display in the Influence Map for the following reasons:

- The standard HCO types are too broad for your business purposes. In this branding example, you can use labels, colors, and icons to identify specific HCO types on the Influence Map.
- To extend the current HCO type icon mappings to HCO types that do not have an icon defined or to define custom HCO types.
- To define specific color mappings for HCOs based on the HCO type; for example: department icons are green and Dialysis and Infusion center icons are blue.

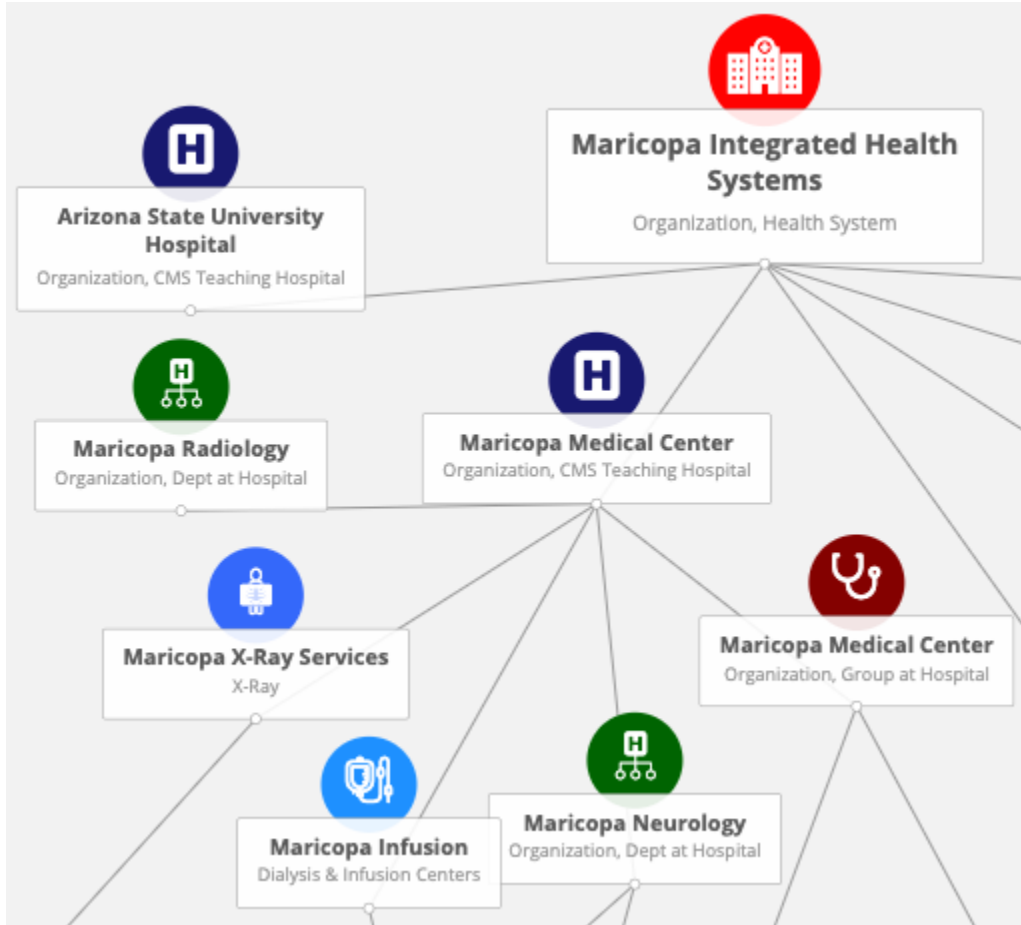
#### Example mapping details

To extend the HCO type mappings, we can use the `hco_type__v` field as the branding field with the following mappings:

- **Object:** HCO
- **Branding field:** `hco_type__v`
- **Mapping**

Reference Value	Color/Icon	Icon
Organization, Health System	Red - Health System	
Organization, Dialysis & Infusion Center	Blue - Infusion Bag	
X-Ray (Custom Reference Value)	Blue - X-ray	
Organization, Group at Hospital	Maroon - Stethoscope	
Organization, Dept at Hospital	Green	
Organization, CMS Teaching Hospital	Purple	

Using this mapping, HCOs with the reference values defined in the `hco_type__v` field use the mapped color and icon defined. If a reference value isn't mapped for custom branding, the default HCO icon mappings are used.



### Customize HCP icons

You might want to distinguish business professionals from other HCPs (for example, prescribers). To do this, you can create a mapping between the reference value for Business Professional to a new icon.

#### Example mapping details

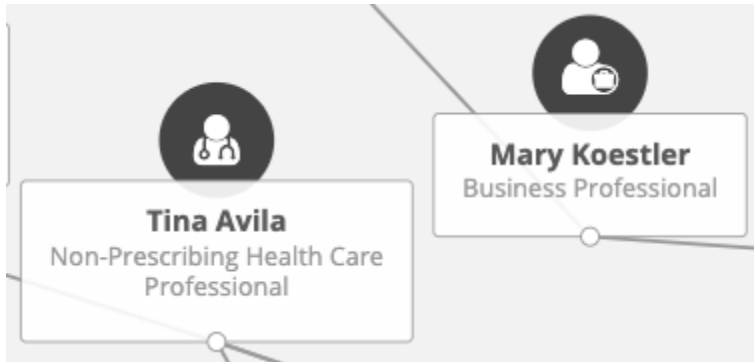
The mapping details use the `hcp_type__v` field and reference values for the custom branding.

- **Object:** HCP
- **Branding field:** `hcp_type__v`
- **Mapping**

Reference Value	Icon
O (Business Professional)	



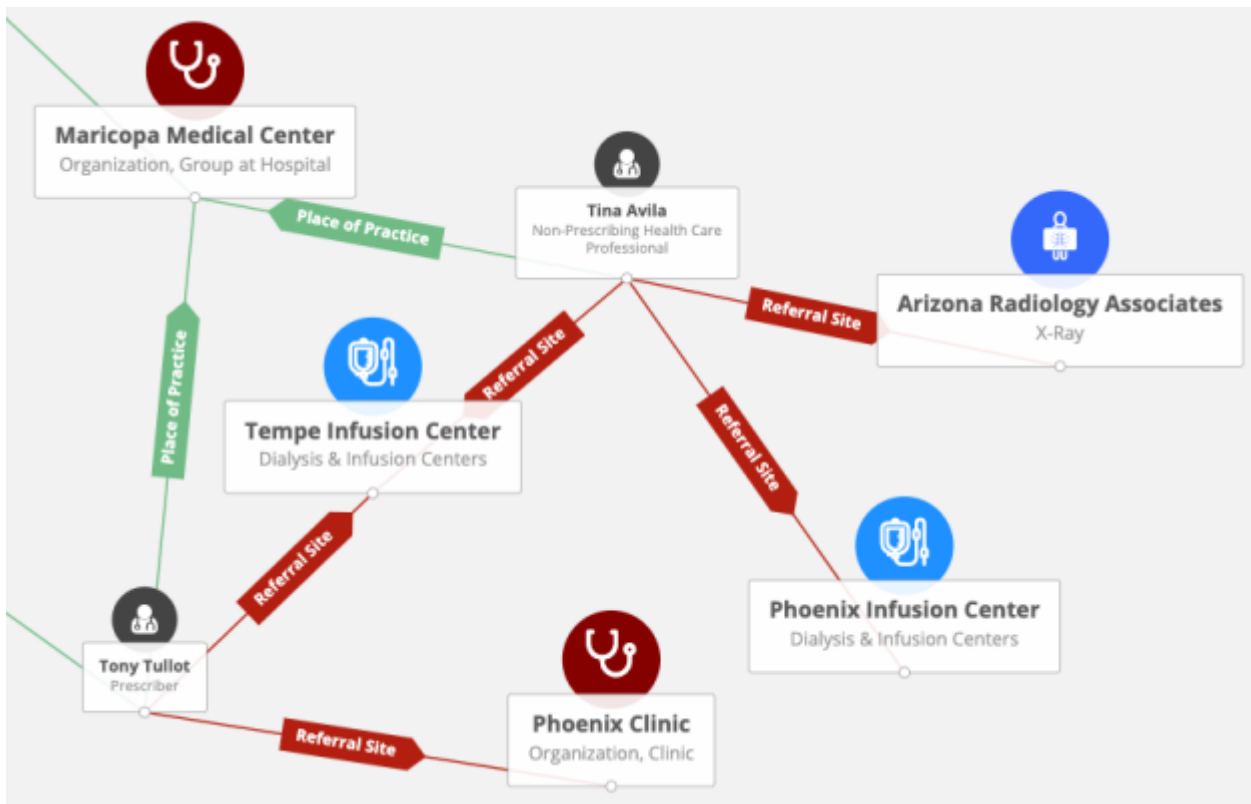
In this example, HCPs that have the Business Professional HCP type will be assigned the Business Professional icon. All other HCP types will default to the standard HCP icon. The Business Professional icon and standard HCP icon will use the default colors defined in the widget configuration.



### Parent HCO relationship branding

You can define color and label branding for HCP-HCO and HCO-HCO relationships. Using colors and labels on the relationships can help you to understand the relationships between accounts from the Influence Map itself. For example, from our Influence Map below, we can understand the patient flow within Maricopa Health System, where patients are being referred to outside the health system.

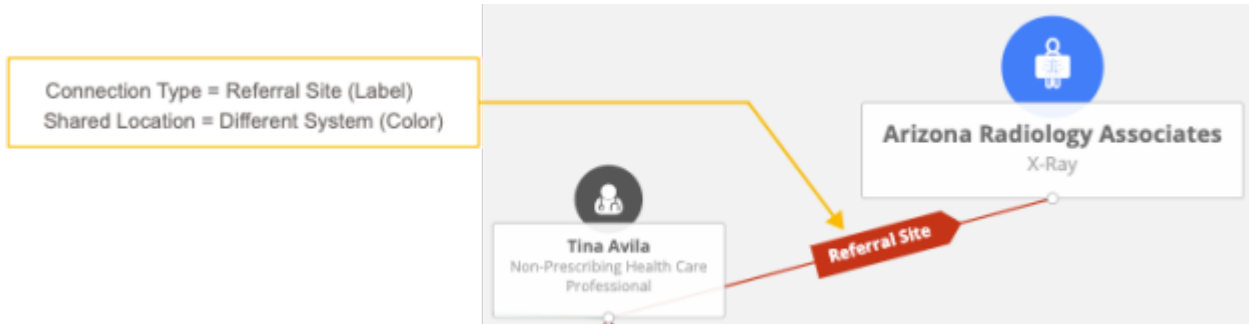
### Example 1 - HCP-HCO relationships





For our example, we will have the following set up for relationships between HCP-HCOs:

- **Line Color** - Represents whether the relationship between the HCO and HCP is within the same system or not. This help users understand quickly from the Influence Map whether patients are being referred to outside the system.
- **Line Label** - Represents the connection between an HCP and an HCO. Either the HCP practices at the location or the HCP refers their patients to the location.



For this custom branding, the following mapping details are required:

- **Object:** Parent HCO
- **Type:** HCP-HCO
- **Label:** hcp\_hco\_connection\_type\_\_c (custom field)

### Reference Codes – PHCOConnectionTypeHCPHCO\_\_c

Country: All countries Export Import

NETWORK CODE ▲	NETWORK NAME	DEFINITION	CODE ACTIVE?	ACTIVE IN ALL COUNTRIES?
POP	Place of Practice	Place of Practice	✓	✓
RS	Referral Site	Referral Site	✓	✓

Show 50 < 1 of 1 >

- **Branding Field:** system\_difference\_\_c (custom field)

### Reference Codes – SameSystem\_\_c

Country: All countries Export Import

NETWORK CODE ▲	NETWORK NAME	DEFINITION	CODE ACTIVE?	ACTIVE IN ALL COUNTRIES?
DIFF	Different System	Different System	✓	✓
SAME	Same System	Same System	✓	✓

Show 50 < 1 of 1 >



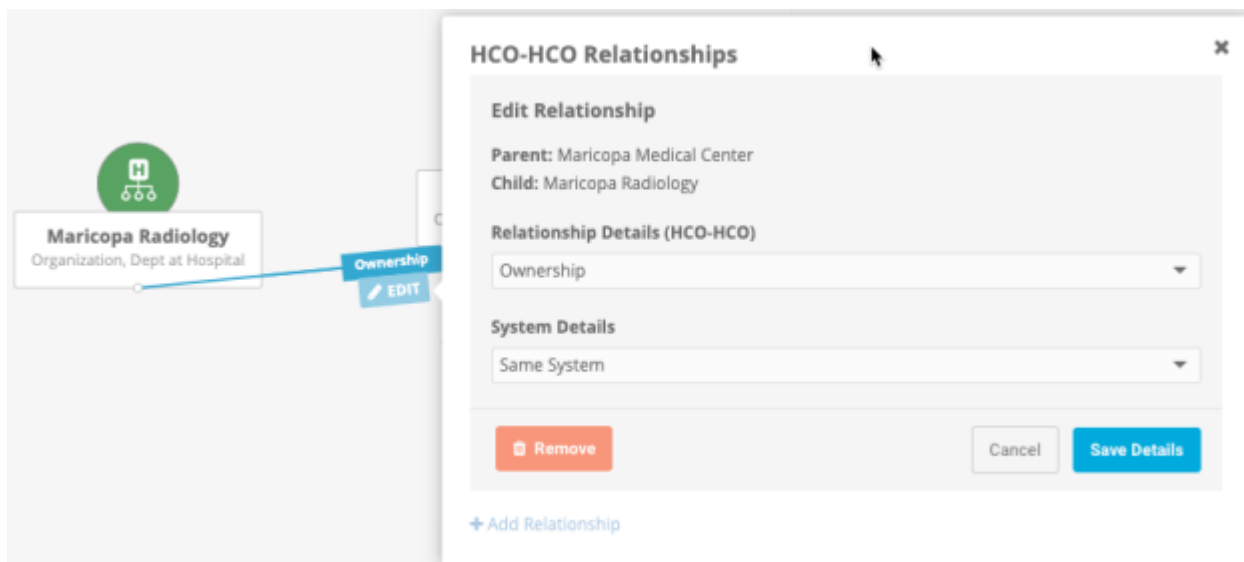
- **Mapping**

Reference Value	Icon
Same System	Green
Different System	Red

In this example, if a parent HCO is Referral Site relationship using the `hcp_hco_connection_type__c` field, it can be identified as being in the Same System or Different System on the Influence Map using the `system_difference__c` field.

### Editing relationships

If the branding field and label field are displayed in the parent hco fields to edit, after a change is made, the relationship will be updated right away.



These labels (fields) are defined in the Affiliation widget configuration.





**Define Fields to be Populated for ParentHCO Relationships**

**HCO TO HCO RELATIONSHIPS**  
Define the additional fields to be filled out when creating HCO to HCO relationships.

☰ Relationship Details (HCO-HCO) ✕

☰ System Details ✕

[+ Add Field](#)

---

**HCP TO HCO RELATIONSHIPS**  
Define the additional fields to be filled out when creating HCP to HCO relationships.

☰ Connection Type (HCP-HCO) ✕

☰ System Details ✕

[+ Add Field](#)

The **Tools** pane contains a new **Relationship** section that you can use to filter and highlight relationships if you have customized the branding.

**Tools**

[+ Add Accounts](#)

[Edit Mode](#)

**Relationships**

Show Relationship Labels

Highlight Shared Location

Same system, different address

Different system, different address

Same system, same address

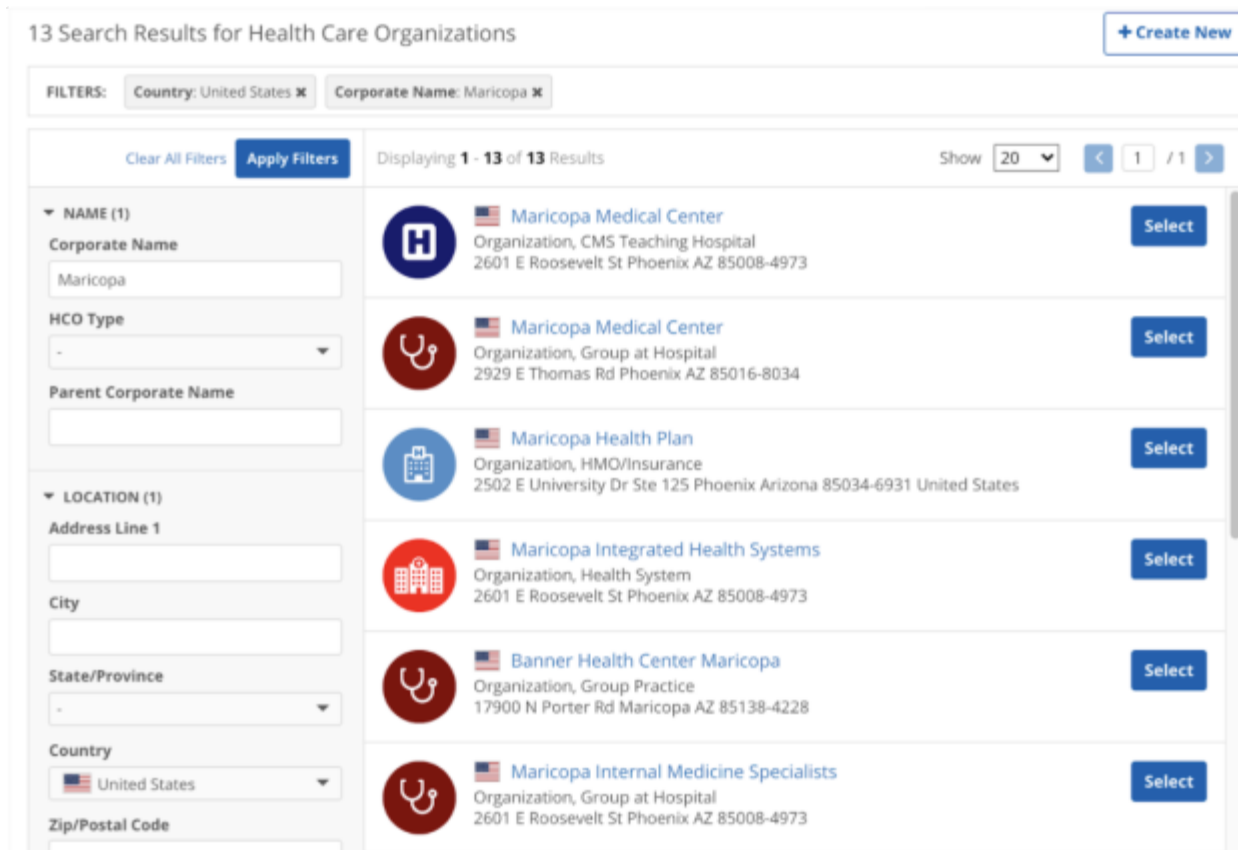
- **Show Relationship Labels** - Choose to display labels and arrows on the connecting lines that represent parent HCO relationships.
- **Highlight Shared Location** - Highlight the connecting lines with color for HCP-HCO and HCO-HCO relationships that are in the same system but different locations to understand the patient journey.

The same type of custom branding can be defined for HCO-HCO relationships.



### Support for custom branding

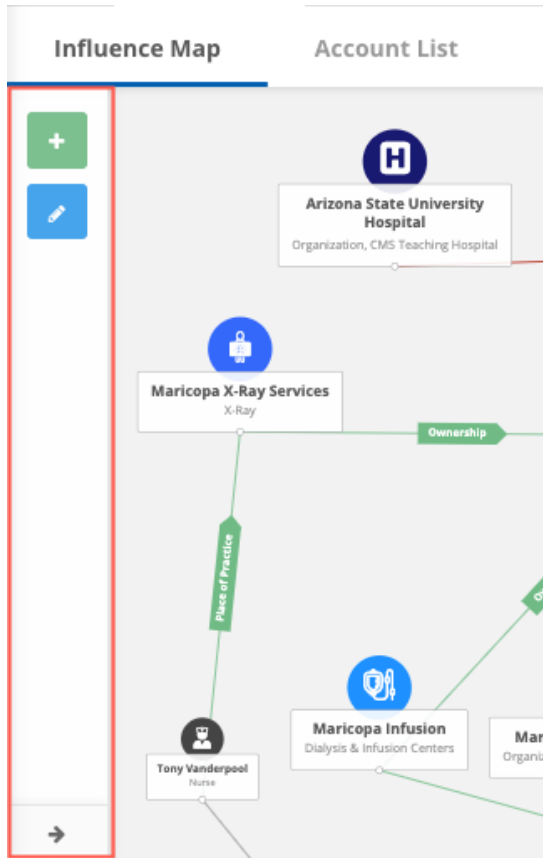
Custom branding is applied to the Affiliation widget and the Search widget. For example, if you search for and add an account to the Influence Map, the search results and record profiles contain the branding that you have customized.



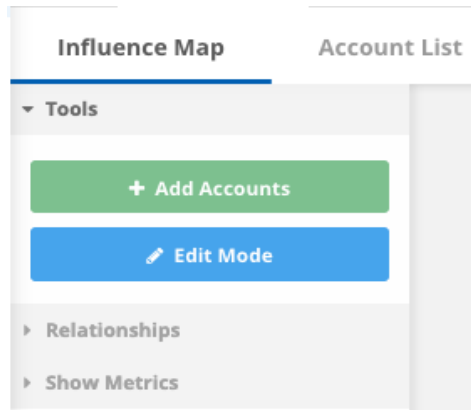
### Show or hide the toolbar

In addition to the branding enhancements, the Tools pane has been updated.

Users can hide the **Tools** pane to create more space for the Influence map. By default, the **Tools** pane displays. When the pane is hidden, only the **Add Accounts** and **Edit Mode** options display. To display the pane again, expand it from the bottom corner.



You can now collapse the sections in the toolbar.



### SEARCH WIDGET - PROFILE ENHANCEMENTS

21R1

#### *Empty sections are collapsed*

Record profile sections that contain no field values are automatically collapsed so users can more easily scan for relevant data.

You can manually collapse or expand any sections on the record profiles.



## NETWORK PORTAL

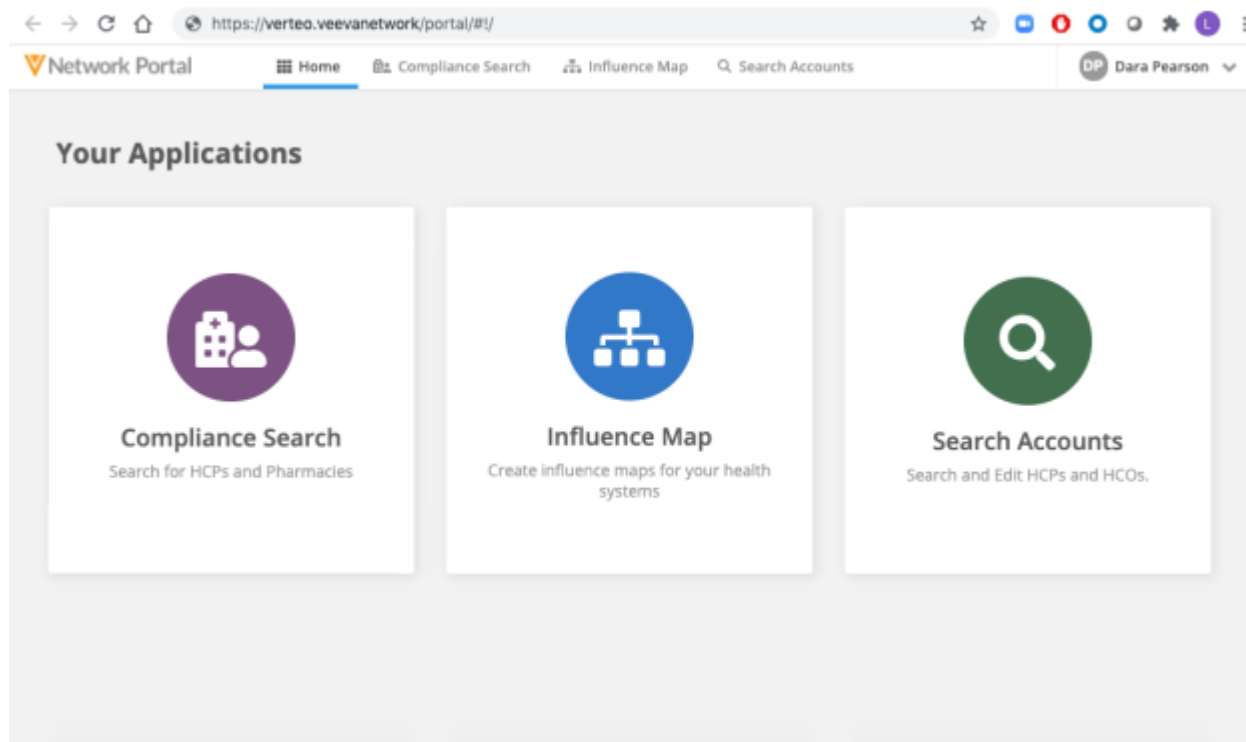
20R3.1

The Network Portal provides a way for business users to access Network data through predefined or custom applications. Network is generally focused on Data Stewardship and Data Management processes and activities. Some users (compliance, marketing, or other front office/back office users) might find the Network UI too technical for their purposes. Using the Network Portal, these users can access Network data through an easy and intuitive user experience.

The Network Portal includes a predefined search application, Search Accounts, so users can find and edit HCP and HCO accounts in Veeva OpenData and your Network instance.

### Network Portal benefits:

- Easy and intuitive user experience for business users to access MDM data
- No coding effort required (contains a drag and drop user interface to update the configuration)
- Create multiple applications that use the Network widgets
- Controlled access to applications using user groups and user permissions
- Quickly implement - users can immediately start using the Network Portal to search HCO and HCP accounts
- Supports single sign-on (SSO) users



The Network Portal is available in all Network instances, but it is disabled by default. System Administrators and System and Data Admin users can enable the Network Portal. See the "Enable the Network Portal" section below.



## *Network Portal videos*

Videos are available to provide an overview for using the Network Portal and for creating an application. To watch the videos, go to the [Network Videos](#) page in the *Veeva Network Online Help*.

## **USING THE NETWORK PORTAL**

### *Access to the Network Portal*

The Network Portal is available to the following users:

- **Portal Users** - A new Network user type that has access to the Network Portal but no access to the Network UI.

These users can sign-in using their Portal Username and password.

For more information about this new user type, see the "Portal User" topic in these *Release Notes*.

- **Network Users** - Standard Users, Data Stewards, Data Managers, System Administrators, and System and Data Admin users. Integration Users do not have access to the Portal; they have access only to the Network API.

These users can sign in using their regular Network username and password.

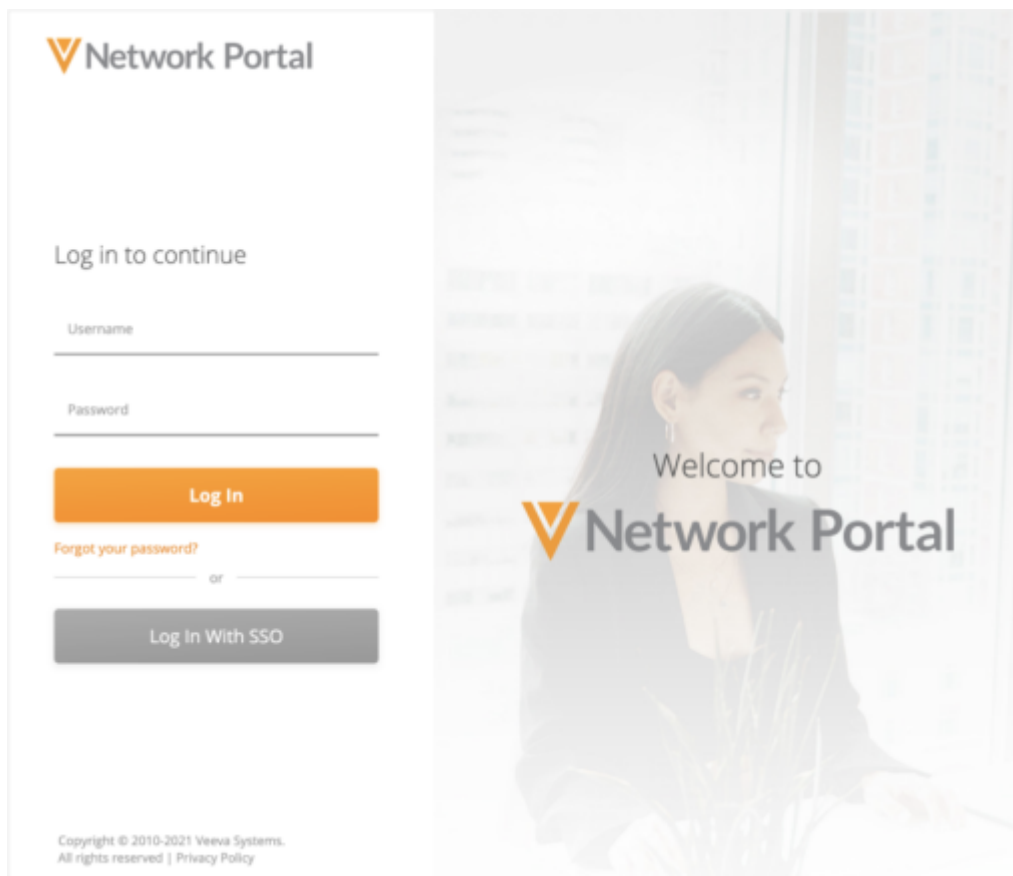
### *Logging into the Network Portal*

You can log into the Network Portal using the following methods:

- Login page (unique URL)
- Network UI
- Single sign-on (SSO)

#### **Login page**

Business users can log into the Network Portal using their Network username, a Portal Username (for non-SSO customers), or through single sign-on (SSO).



Portal Users and Network users can reset their password on the Network Portal login page. Click **Forgot your password**.

### Network UI

When the Network Portal is enabled, Network users can access it from their Network instance if they have been granted access to the Network Portal.

On the Network menu bar, click **Network Business Portal**.



Some user types can also access the Network Portal from their Home or Overview page.

- Standard users and Data Stewards - Click the **Network Business Portal** link on the Home page.
- System Administrators and System and Data Admin users - Click the **Launch the Network Portal button** under the **Widgets and Portal** heading on the Admin Overview page.

The Network Portal will open in a new browser tab.



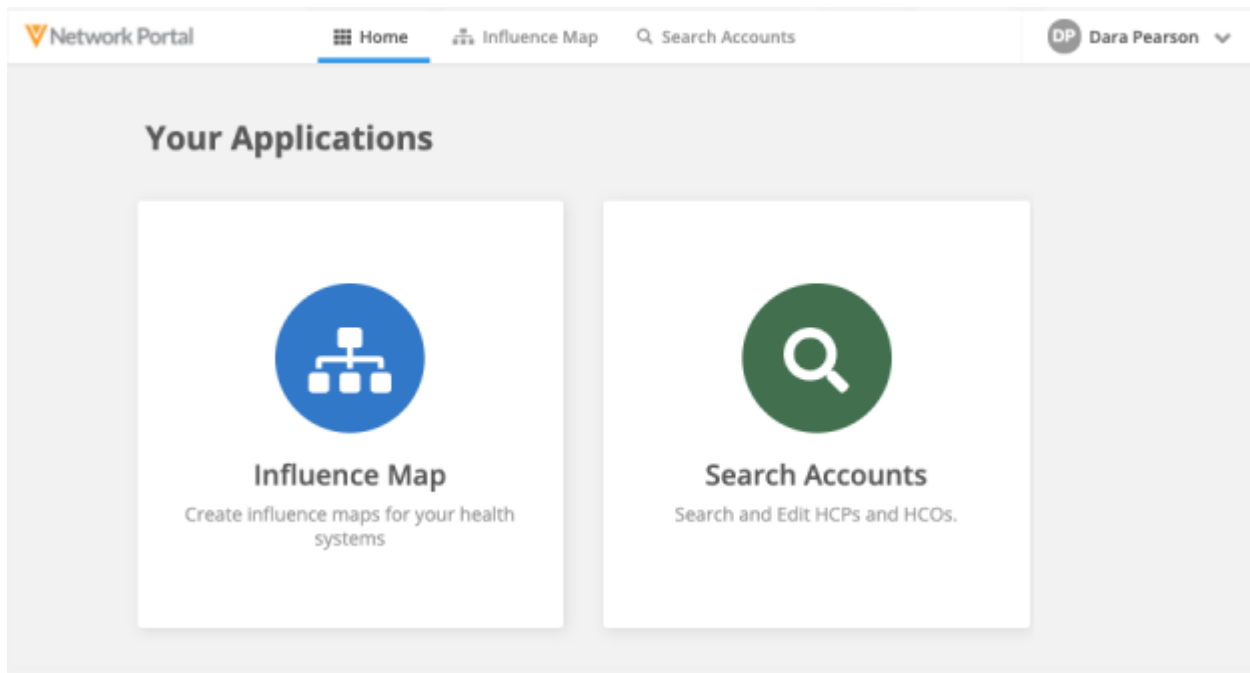
## Single sign-on (SSO)

Users can access the Network Portal using SSO through the following methods:

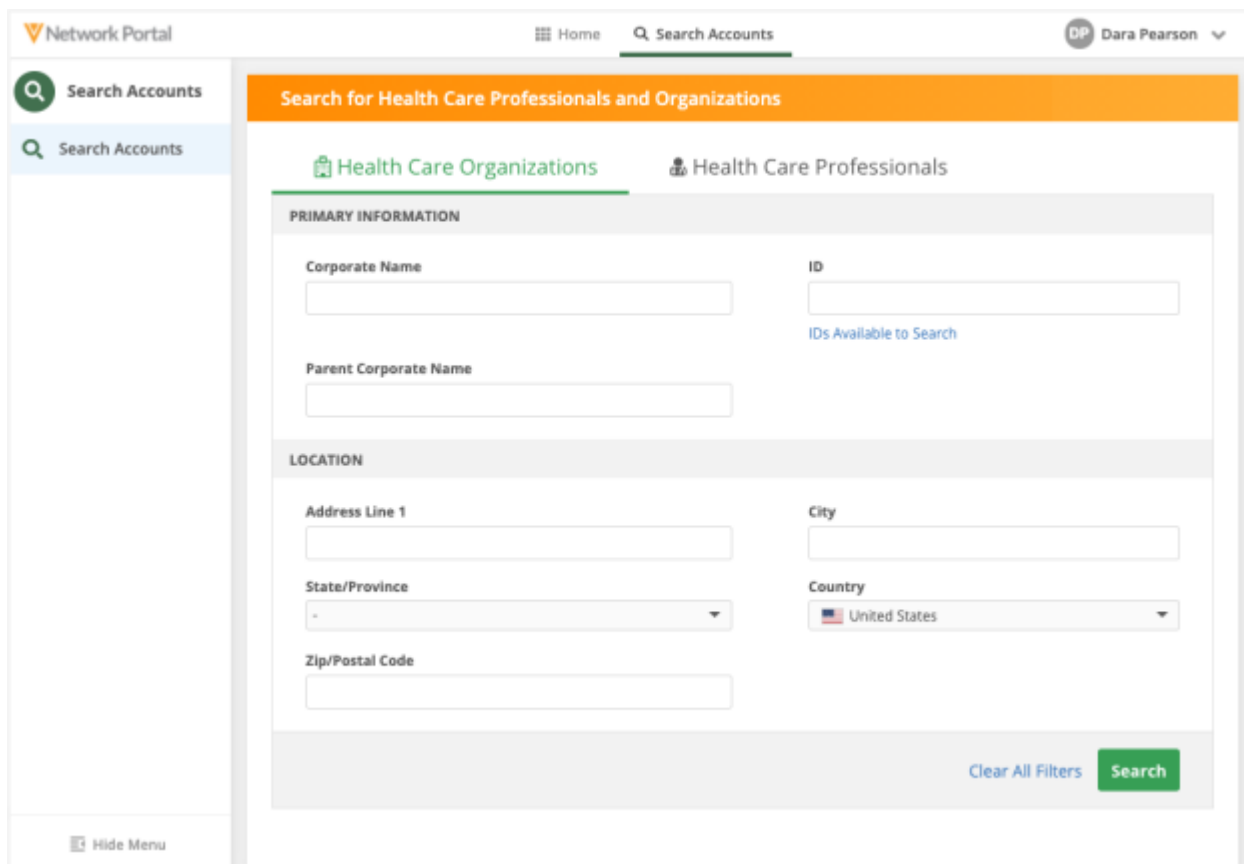
- SSO dashboard (for example, a Network Portal tile on an Okta® Dashboard) that is optionally configured by your SSO admin
- Bookmarked Portal SSO URL
- Network Portal login page using the SSO button

## Viewing the Network Portal

When the Network Portal opens, the default view is the **Home** page. This page contains all of the enabled applications that you have access to in the Network Portal.



If there is only one app available in the Network Portal, the app will be open by default. For example, when you log in, the **Search Accounts** application will be open.

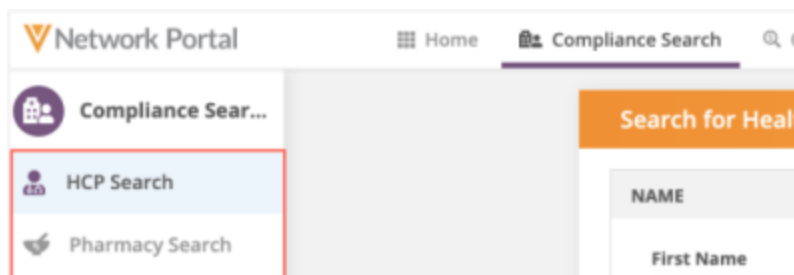


### Navigation

Use the navigation bar at the top to navigate to another application or to go to the Network Portal **Home** page to view all applications. The logo in the top left corner will also navigate to the Network Portal Home page.

### Multiple widgets

An application can contain multiple Network widgets. Use the tabs in the left panel to switch between widgets. Each tab (widget) has its own unique URL so you can bookmark the page.



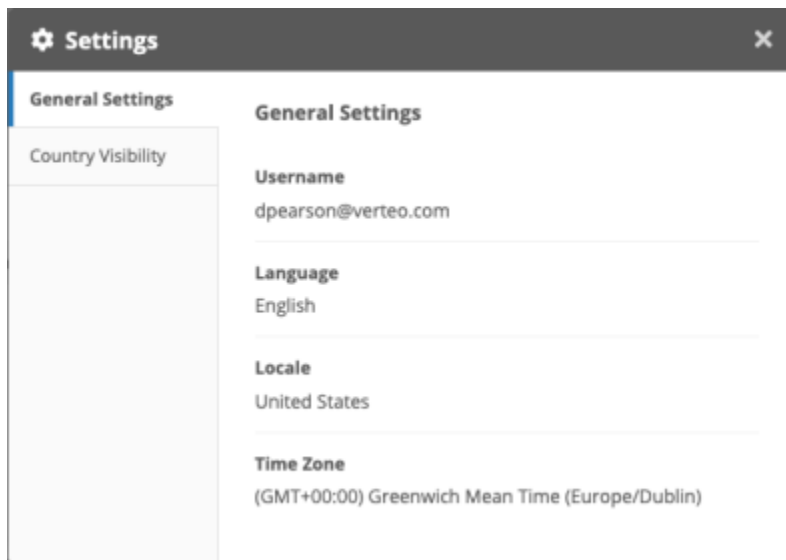




## User settings

You can view your Network Portal user settings. The settings are read-only but can be helpful to Veeva Support for troubleshooting issues.

1. In the top-right corner, expand the arrow beside your user name.
2. Click **Settings**.
3. On the **General Settings** tab, view your user name, language, locale, and timezone.



SSO users can view their language and time zone.

4. Click **Country Visibility** to view the countries that you have access to view records for. This is helpful to troubleshoot issues where you cannot access records from specific countries.

## Log out of the Network Portal

1. In the top-right corner, expand the arrow beside your user name.
2. Click **Logout**.

**Note:** When Network users log out of the Network Portal, they are also logged out of the Network UI if they were signed in.

## Search Accounts application

The **Search Accounts** application is available by default when the Network Portal is enabled. This application uses the Network Search widget. You can search for HCO and HCP accounts, edit records (if you have edit access through your data visibility profile), and create new records.

**Note:** There is no option to download records from Veeva OpenData. If you click **Edit** to make a change to a record, the record will be downloaded from OpenData.



### Search for accounts

Use the widget to search for HCP and HCO accounts. Click the **Health Care Organizations** and **Health Care Professionals** tabs at the top of the application to toggle between the two search forms.

**Search for Health Care Professionals and Organizations**

Health Care Organizations     Health Care Professionals

**PRIMARY INFORMATION**

First Name <input type="text" value="John"/>	Last Name <input type="text" value="smith"/>
ID <input type="text"/>	Parent Corporate Name <input type="text"/>

[IDs Available to Search](#)

**LOCATION**

Address Line 1 <input type="text"/>	City <input type="text"/>
State/Province <input type="text" value="Arizona"/>	Country <input type="text" value="United States"/>
Zip/Postal Code <input type="text"/>	

[Clear All Filters](#)   

The search results display the accounts that matched the field values that you specified. You can continue to change or filter the results using the fields in the left panel.

**Search for Health Care Professionals and Organizations**


[← Back to Search](#)

1 Search Results for Health Care Professionals

**FILTERS:**

[Clear All Filters](#)        Displaying 1 - 1 of 1 Results    Show      1 / 1

**PRIMARY INFORMATION (2)**

First Name <input type="text" value="john"/>	 <b>James Smith</b> Non-Prescribing Health Care Professional 450 White Spar Rd Prescott Arizona 86303-4626
Last Name <input type="text" value="smith"/>	

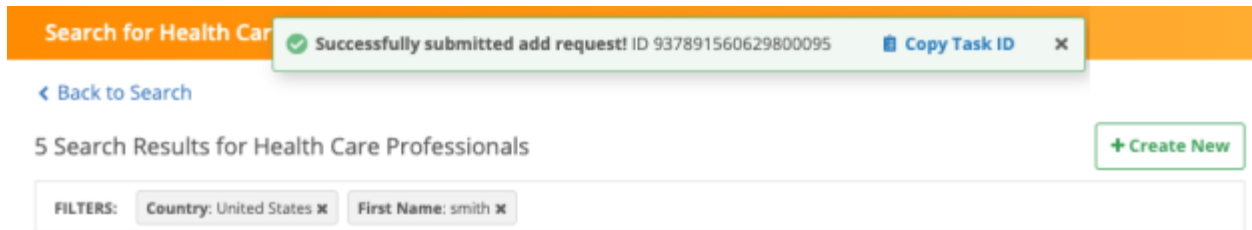
For more information about searching for records, see [Using the search widget](#) in the *Veeva Network Online Help*.



## Create a new account

If you cannot find an existing account that matches your search criteria, you can create a new one. On the search results page, click **Create New**.

When you submit the request, a confirmation message displays and includes the Network entity ID of the new account. Click **Copy Task ID** if you want to store your request somewhere locally for reference. Click the **x** icon to remove the message.



For information about adding accounts, see [Creating add requests](#) in the *Veeva Network Online Help*.

## NETWORK PORTAL ADMINISTRATION

System Administrators and System and Data Admin users can customize the Network Portal and its applications and widgets.

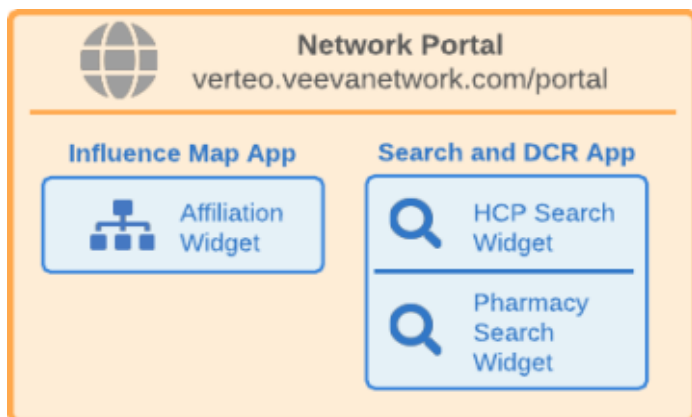
The Network widgets and Network Portal configurations are located on a new tab called **Widgets & Portal** in the Admin console.



This new tab does not display for Data Manager users; the access to configure Network widgets has been removed for this user type.

### *About the Network Portal*

The Network Portal contains applications that are connected to Network widgets. Only applications that you have access to will be displayed in the Network Portal. Access to the Network Portal and each application is controlled by user and user group permissions. The Search Accounts application is available by default for all users except Integration Users.



### *Launching the Network Portal*

The Network Portal can be quickly configured and available for your users in four steps:

1. **Define settings and permissions** - Configure the Network Portal so users can access it. By default, a system managed user group is assigned to give access to all users except Integration Users.
2. **Configure applications** - Create new applications for the Network Portal. Define the name, permissions, and widgets associated with the application. This includes customizing the associated widgets and profile layouts.
3. **Preview and enable** - Explore the Network Portal and its full functionality and then enable it for your users.

**Note:** The Network Portal is not enabled by default.

4. **Provide access to users** - Distribute the Network Portal URL to users and optionally create bookmark applications in your SSO.

Information about each activity is available below.

### *Define settings and permissions*

System Administrators and System and Data Admin users can customize the Network Portal settings and user permissions.

To customize the settings:

1. On the Admin console, click **Widgets & Portal > Network Portal**.
2. On the Network Portal page, click **Settings and Permissions**.
3. In the **Details** section, you can update the following settings:
  - **Status** - By default, the Network Portal is disabled. Toggle the button to enable it; all applications can be enabled. If you disable the Network Portal, the applications will also be disabled.

**Important:** The associated widgets will not be disabled because they might be used in your other downstream integrated systems.



- **Portal SSO URL** - If single sign-on is configured for your Network instance, the read-only URL displays.  
This can be used to provide a link in an internal website to the Network Portal where users can be signed in automatically through SSO. It can also be used to set up a bookmark application for your SSO provider.
- **Logo** - The Network Portal logo displays by default. Click **Select Logo** to add your custom branding.  
The logo displays on the login page and in the Network Portal.

Network Portal Settings & Permissions

Back Launch Portal Save

Details

Status  Enabled

Portal SSO URL [https://dev-832131.oktapreview.com/app/veevasystemsdev832131\\_pmpush4\\_1/exkumt047tAlp9rML0h7/sso/saml?RelayState=https%3A%2F%2Fpmpush4-307.vdmdev.com%2Fportal%2F](https://dev-832131.oktapreview.com/app/veevasystemsdev832131_pmpush4_1/exkumt047tAlp9rML0h7/sso/saml?RelayState=https%3A%2F%2Fpmpush4-307.vdmdev.com%2Fportal%2F)

Logo   
Recommended size (254 x 40px)

4. Use the **Permissions** section to grant access to the Network Portal. By default, **All Users Except Integration Users** is selected. This is a system managed user group that includes all active users in your Network instance except Integration Users. Integration Users cannot access the Network UI or Network Portal UI.

To provide more granular access to the Network Portal, click **Specific Users / User Groups**. The **User Groups** and **Users** sections become active so you can configure user access.

Permissions

Who can use the Network Portal?  All Users Except Integration Users  Specific Users / User Groups

**USER GROUPS**  
Select which user groups you want to give access to the Portal, or [create a new group here](#).

Search selected user groups ...

<input type="checkbox"/>	GROUP NAME	DESCRIPTION	TYPE	ACTIVE USERS	STATUS
<input type="checkbox"/>	Portal Users	All active users with the Portal user type.	System Managed Group	6	Active
<input type="checkbox"/>	SSO Users	All active Single Sign-on (SSO) users. An SSO user is <a href="#">...more</a>	System Managed Group	1	Active
<input type="checkbox"/>	Standard Users	All active users with the standard user type.	System Managed Group	3	Active

Displaying 1 to 3 of 3 Show 25 1 of 1



- In the **User Groups** section, choose the user groups that should have access to the Network Portal. You can choose system managed groups or existing custom groups in your Network instance.

**Note:** The **All Users** and **Integration Users** user groups will not be available in the list.

To define a new group for this application, click **Create a new group here** to open the User Groups page in a new browser window.

When a group is added, a group **Description**, **Type**, count of **Active Users** in the group, and **Status** displays in the list.

- In the **Users** section, choose the users that should have access to the Network Portal.

When a user is added, their **User Type**, **Status**, **Security Profile**, **Profile** (data visibility profile), and **Inbox Task Groups** display in the table.

The screenshot shows a web interface titled "USERS" with the instruction "Select which users you want to give access to the Portal." Below this is a search bar for "Search selected users ..." and two buttons: "Remove Users" and "Add Users". A table lists users with the following columns: NAME, USERNAME, USER TYPE, STATUS, SECURITY POLICY, and PROFILE. One user is listed: "Admin, NetOps" with username "netops.admin@verteo.vdmdev.com", user type "System Admin", status "Active", security policy "Classic", and profile "AD Data, AU Data, BE D". At the bottom, it says "Displaying 1 to 1 of 1" and "Show 25" with a dropdown arrow and "1 of 1" with navigation arrows.

<input type="checkbox"/>	NAME	USERNAME	USER TYPE	STATUS	SECURITY POLICY	PROFILE
<input type="checkbox"/>	Admin, NetOps	netops.admin@verteo.vdmdev.com	System Admin	Active	Classic	AD Data, AU Data, BE D

You can remove users and user groups if necessary.

If a user or user group is disabled, they will no longer have access to the Network Portal. If the Network Portal is disabled and becomes enabled again, users with previous access will regain functionality; the same settings will be retained.

- In the **Login Page Settings** section, choose to add the SSO button on the Network Portal login page. You can also define your own label for the SSO button. By default, the English label is `Login With SSO`. This is available if SSO is enabled in your Network instance.
- Save** your changes.

Click **Launch Portal** to open the Network Portal.

### *Managing applications*

All of the applications configured in your Network instance are listed on the Network Portal configuration page. The list is sorted by name.

Each application contains the following information:

- **Icon** - The icon that will display in the Network Portal.
- **Name** - The application name.
- **Description** - The description of the application.
- **User Access** - The user groups and individual users that have access to the application. If there is only one active group or user, the name displays. If there are multiple active groups or users, a count displays.
- **Status** - Indicates if the application is enabled or disabled.



You can open each application to edit these details.

## Network Portal

Settings and Permissions

[Launch the Network Portal](#) <https://verteo.veevanetwork.com/portal/> ENABLED

[Create App](#)

APPLICATION NAME	USER ACCESS	STATUS
<b>InfluenceMap</b> Influence Map for our KAM teams to manage health systems for Cholecap.	4 user groups	<span>ENABLED</span>
<b>PharmacySearch</b> Application to search pharmacies only.	3 user groups and NetOps Admin	<span>ENABLED</span>
<b>SearchAccounts</b> Application to support business users and compliance users to search, view, and edit HCP and HCO Profiles. If a record cannot be found users can create a new record through the search app.	All Users Except Integration Users	<span>ENABLED</span>

### Creating an application

You can create applications to your Network Portal.

1. On the Network Portal page, click **Create App**.
2. In the **Details** section, provide the following information:
  - **Application Name** - The name for your app for the Network Portal configuration page. This is not the name that displays in the Network Portal.
  - **Application Identifier** - The identifier is used in the unique Network Portal URL for the app. When you click the field, it is populated with the **Application Name** by default.

#### Example

When the application is launched from the Network Portal, it has a unique URL.

```
https://verteo.veevanetwork.com/portal/#!/app/{applicationidentifier}/{widgetidentifier}
```

**Important:** Changing the **Application Identifier** after it has been set might break any bookmarked or saved links.

- **Description** - A description of the application for the Network Portal configuration page. This description does not display in the Network Portal.
- **Color** - The color for the app. The default color is a color that has not been previously used for an app. Colors can be reused.



- **Icon** - The icon that represents your application. Choose an icon from the library. Icons can be reused.
- **Status** - Enable or disable the app. The app is enabled by default.

**▼ Details**

**Application Name**  
This name will be used in other Network pages.

**Application Identifier**  
The application identifier will be used to generate the unique Portal URL for this application.

**Description**

**Color**

**Icon**

**Icon Preview** Rx

**Status**  **Enabled**

3. The **Permissions** section defines the users that can access the app in the Network Portal. By default, the **All Users Except Integration Users** user group is selected.  
To provide more granular access to the application, choose **Specific Users / User Groups**.
4. In the **User Groups** section, choose the user groups that should have access to the application. You can choose system managed groups, existing custom groups in your Network instance, or you can create a new user group for this application.  
When a group is selected, a group **Description**, **Type**, count of **Active Users** in the group, and **Status** displays in the list.
5. In the **Users** section, choose the users that should have access to the application.  
When a user is selected, their **User Type**, **Status**, **Security Profile**, **Profile** (data visibility profile), and **Inbox Task Groups** display in the table.





**Permissions**

Who can use the application?  All Users Except Integration Users  
 Specific Users / User Groups

---

**USER GROUPS**  
Select which user groups you want to give access to the application, or [create a new group here](#).

Search selected user groups ...

<input type="checkbox"/>	GROUP NAME	DESCRIPTION	TYPE	STATUS
<input type="checkbox"/>	▼ Portal Users	All active users with the Portal user type.	System Managed Group	Active
<input type="checkbox"/>	▼ SSO Users	All active Single Sign-on (SSO) users. An SSO user is a user... <a href="#">more</a>	System Managed Group	Active
<input type="checkbox"/>	▼ Standard Users	All active users with the standard user type.	System Managed Group	Active

Displaying 1 to 3 of 3 Show 25 1 of 1

---

**USERS**  
Select which users you want to give access to the application.

Search selected users ...

<input type="checkbox"/>	NAME	USERNAME	USER TYPE	STATUS	SECURITY POLICY	PROFILE
<input type="checkbox"/>	Admin, Ops	ops.admin@verteo.com	System Admin	Active	Classic	EU - DE Data, EU - ES Data, EU - FF

Displaying 1 to 1 of 1 Show 25 1 of 1

You can remove users and user groups if necessary.

If a user or user group is disabled, they will no longer have access to the application or the Network Portal. If the Network Portal is disabled and becomes enabled again, users with previous access will regain functionality; the same settings will be retained.

- 6. The **Application Labels** section defines the application **Name** and **Description** that the user will see in the Network Portal.

By default, the English language is selected. You can change the language or add more languages.

- 7. In the **Widget Configuration** section, define the widgets that will be used in the application.

Provide the following information:

- **Widget Type** - Select the type of widget. Search widgets and Affiliation widgets are supported.

**Note:** The Affiliation widget is available if it is enabled in your Network instance.

- **Widget** - Choose the specific widget to use from your Network instance. The list is filtered by the type that you selected.
- **Widget Identifier** - The identifier that is included in the unique Network Portal URL.



**Example**

When the application is launched from the Network Portal, it has a unique URL. If you have multiple widgets in the app, the URL will be unique for each widget.

```
https://verteo.veevanetwork.com/portal/#!/app/{applicationidentifier}/{widgetidentifier}
```

**Important:** Changing the **Widget Identifier** after it has been set might break any bookmarked or saved links.

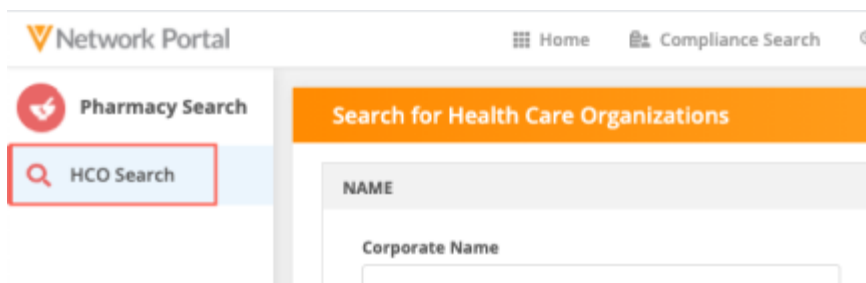
- **Icon** - Choose the icon that will display in the application.
- **Section Labels** - The widget label that displays in the application beside the icon.

The screenshot shows the configuration page for the 'HCOSearchWidget'. It includes the following fields and options:

- Widget Type:** A dropdown menu set to 'Search'.
- Widget:** A dropdown menu set to 'HCOSearchWidget'.
- Widget Identifier:** A text input field containing 'HCOSearch'. Below it is a note: 'The widget identifier will be used to generate the unique Portal URL.'
- Icon:** A 'Choose Icon' button and a preview box showing a magnifying glass icon.
- Section Labels:** A table with two columns: 'LANGUAGE' and 'SECTION NAME'. The first row shows 'English' and 'HCO Search'.

**Example - Search widget**

The **Section Label**, HCO Search, displays beside the defined icon in the Network Portal.



8. In the **Advanced Settings** section, the settings depend on the type of widget.



## Search widget

The following optional settings display:

- **Background Search Filter** - Add a filter to automatically narrow the search results to meet specific criteria. The filters require API syntax, so an example filter to limit search results for active records displays as a suggestion in the field.

The following syntax rules apply for this filter:

- Use an ampersand (&) to separate the fields used for filtering.
- To separate multiple reference codes, you must use a comma (,).
- Fields must be prefixed with their object (for example, **hco.hco\_status\_\_v=A**)
- Only reference fields and checkbox fields are supported for filters.
- Only fields on main objects (HCPs and HCOs) can be used for filtering.

### Example

Define a filter to limit the HCO search results to active pharmacies only.

```
hco.hco_status__v=A&hco.hco_type__v=11:3,11:4,11:1,11:2,11:11,11:12,11:9,11:10,11:7,11:8,11:5,11:6,13:3,11:99,11:97,11:98,6:3,14:10
```

The filter includes all of the reference values for pharmacies for the `hco_type__v` field.

The screenshot shows the 'Advanced Settings' section with three configuration items:

- Background Search Filter**: A text input field containing the filter syntax: `hco.hco_status__v=A&hco.hco_type__v=11:3,11:4,11:1,11:2,11:11,11:12,11:9,11:10,11:7,11:8,11:5,11:6,13:3,11:99,11:97,11:98,6:3,14:10`
- Background Parent HCO Filter**: A text input field containing the filter syntax: `hco.hco_status__v=A`
- Create Unverified for New Records**: A dropdown menu currently set to 'Use Workflow Settings'.

- **Background Parent HCO Filter** - Define a filter to limit the parent HCOs that are returned in the search results. A filter to limit search results for active records displays as an example of the required syntax. The syntax rules that apply to the Background Search Filter also apply to this filter.

### Example

If you want to only see those parent HCOs that are active Health Systems, you can change the Background Parent HCO filter to the following:


```
hco.hco_status__v=A&hco.hco_type__v=4:37
```



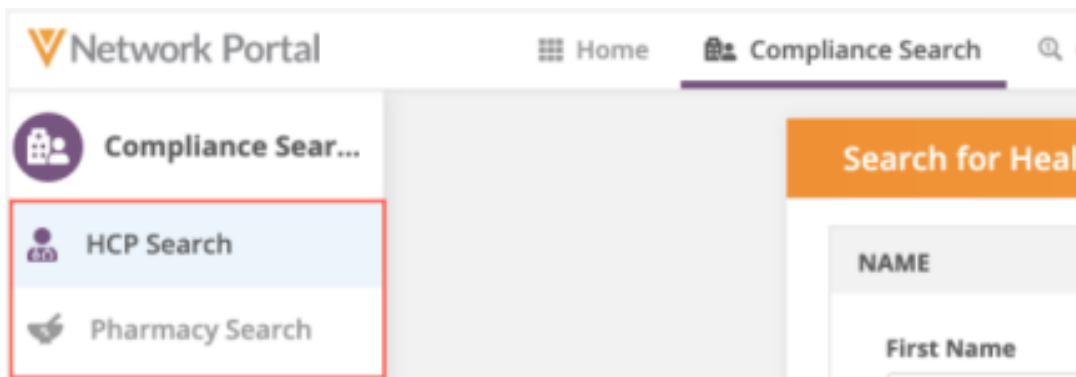
- **Create Unverified for New Records** - Define the behavior for new records that are created in the application.
  - **Yes** - Create unverified records. This enables users to submit a new record and immediately make changes to the record. This might override the existing workflow settings. New records will have an `Under Review` record state.
  - **No** - New record requests must be reviewed by data stewards before changes can be made. This might override the existing workflow settings.
  - **Use Workflow Settings** - Use the existing **Create Unverified** setting (**Settings > Workflow Settings**) to determine the behavior for add requests in the application. This value is defined by default.

### Affiliation widget

The following optional setting displays:

- **Ready Only Mode** - Select to display the Affiliation widget in read-only mode; users will not be able to add or edit affiliations.
9. **Add Widget** - Add another widget to the application. If you have multiple widgets, use the handle  to change the order that the widgets display in the application.

For example, if you include two Search widgets (one for HCPs and one for pharmacies), you can define their display order in the application.



Widgets can be removed after they have been added to the application. Click **Remove Widget**. An application must have one widget defined.

10. **Save** your changes.

The application now displays in the list on the Network Portal page. It is enabled by default.



### Managing the Search Accounts application

The Search Accounts application is predefined and ready to use as soon as the Network Portal is enabled in your Network instance. This application includes a series of configurations that have been implemented to support the application.

The following new configurations are included in your Network instance:

- **System** - network\_portal\_\_v
- **Search widget** - NetworkPortalSearch
- **Profile layouts** - NetworkWidgetsLayoutHCP and NetworkWidgetsLayoutHCO

The configurations are predefined so the application can be used immediately. The search widget and profile layouts can be customized.

### Customize the NetworkPortalSearch widget

A search widget, **NetworkPortalSearch**, is predefined and associated to the Search Accounts application. It is enabled by default.

To view or edit the widget, in the Admin console, click **Widgets & Portal > Network Widgets**.

**NetworkPortalSearch** [Cancel] [Generate Code] [Save]

▼ Details

Name: NetworkPortalSearch      System: network\_portal\_\_v

Code: networkportalsearch\_\_c      Type: Search Widget

Widget Enabled:  Yes  No

Description: Network Portal Search

▼ General Settings

**AUTHENTICATION**

List the domain names of the external web sites that will host this widget.

Domain: \*.veevanetwork.com

+ Add Domain



## Widget settings

The following settings have been applied:

- **System:** `network_portal__v` (a new system that is created in your Network instance for the widget)
- **Domain:** `*.veevanetwork.com`
- **Languages:** All supported languages
- **Add Requests:** Yes, allows users to send add requests
- **Generate Custom Keys:** No, keys are not generated
- **Search Style:** Advanced Search Only
- **Enabled Entities:** Health Care Organizations, Health Care Professionals
- **Profile Layout** - Overrides data visibility profiles and uses the predefined **NetworkWidgetsLayoutHCO** and **NetworkWidgetsLayoutHCP** layouts.
- **Branding** - A header that includes the widget title, Search for Health Care Professionals and Organizations. Colors and fonts are predefined.

### Customize the NetworkWidgets profile layouts

Two custom profile layouts are provided and apply to all countries. These are simplified layouts that are associated to the **NetworkPortalSearch** widget. The profiles contain a minimal number of fields so users have fewer fields to complete when they create a record. You can add fields that are essential to your business purposes.

- **NetworkWidgetsLayoutHCO**
- **NetworkWidgetsLayoutHCO**

To view or edit the layouts, in the Admin console, click **Data Model > Profile Layouts**.

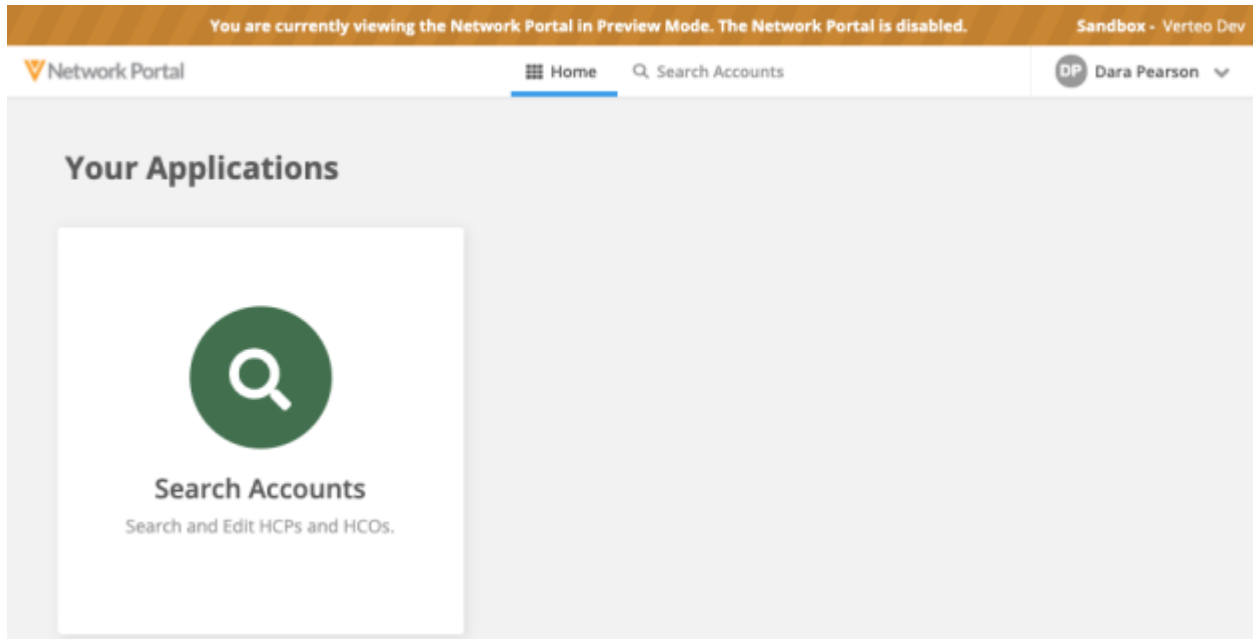
### *Preview the Network Portal*

Before the Network Portal is enabled, you can preview it and the Search Accounts application with full functionality (for example, you can search for accounts and create data change requests). This gives you an opportunity to try out the Search Accounts app without enabling or configuring anything. Preview Mode is only available when the Network Portal is disabled.

To access the Network Portal in Preview Mode:

- On the Network Overview page, click **Preview the Network Portal** under the **Widgets and Portal** heading.
- On the Network Portal page (**Portal & Widgets > Network Portal**), click **Preview the Network Portal**.

A banner displays at the top of the Network Portal to remind you that you are in Preview Mode.



If other applications have been configured for the Network Portal, they display in Preview Mode only if you have permission to the application. The status (Enabled or Disabled) of the application is ignored for Preview Mode.

### *Enable the Network Portal*

Each Network Sandbox and Production instance has its own Network Portal. A unique Network Portal URL is assigned for each Network instance.

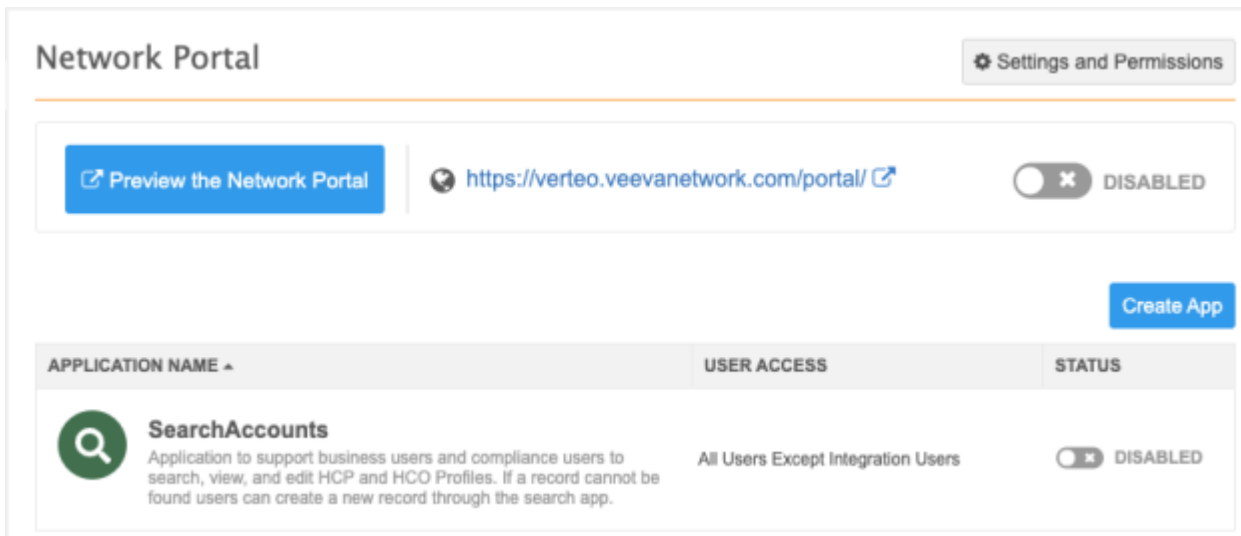
```
<instance name>.veevanetwork.com/portal
```

For example, `verteo.veevanetwork.com/portal`.

When you enable the Network Portal for your Network instance, the **Search Accounts** application is available to all users except Integration Users by default.

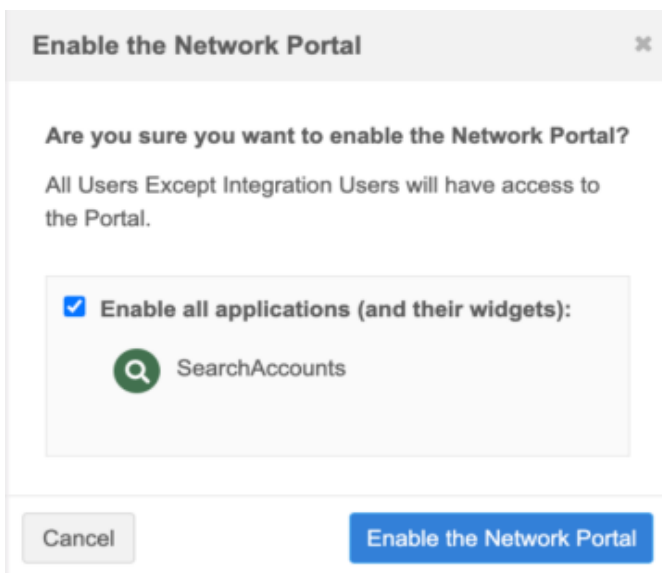
To enable the Network Portal:

1. In the Admin console, click **Widgets & Portal**.
2. Click the **Network Portal** tab.
3. Beside the Network Portal URL, toggle the **Disabled** button so it displays the **Enabled** status.



- On the **Enable the Network Portal** dialog, confirm that you want to enable the Network Portal for the defined users and user groups.

The **Search Accounts** default application and any other applications that have been created are listed and will be enabled if the checkbox is selected. If the checkbox is not selected, the previous application statuses will not change.

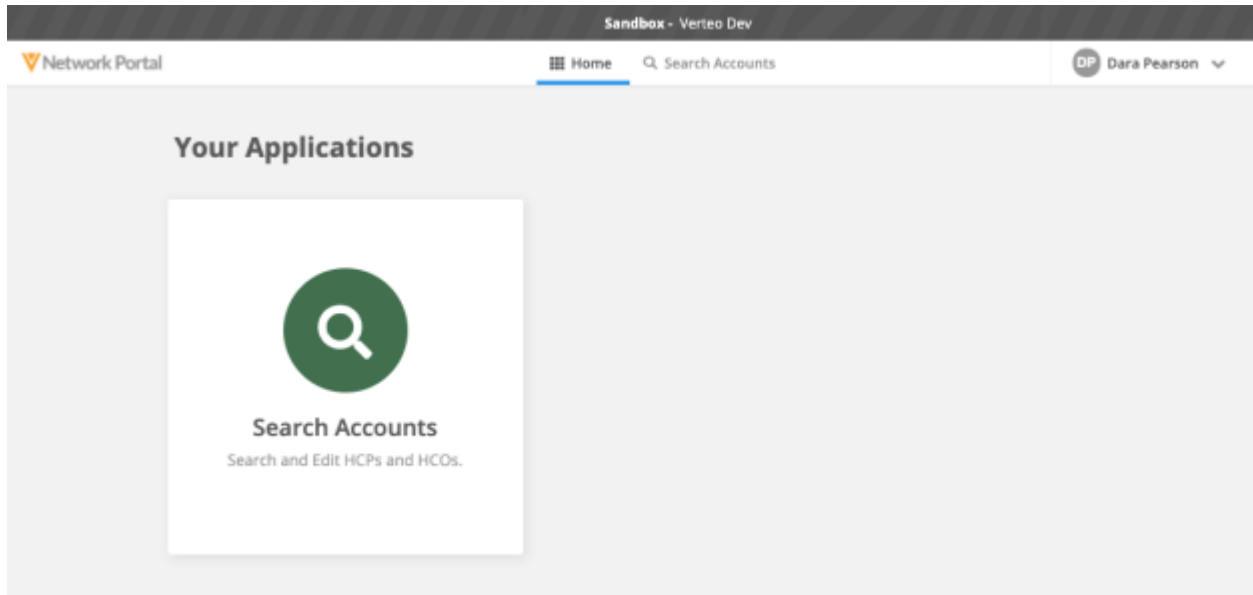


- Click **Enable the Network Portal**.

The Network Portal and the **Search Accounts** application are enabled. To open the Network Portal, click the URL or **Launch the Network Portal**.

**Note:** When you use the Network Portal for a Sandbox instance, the tag and instance name display in a banner to identify the environment you are using.



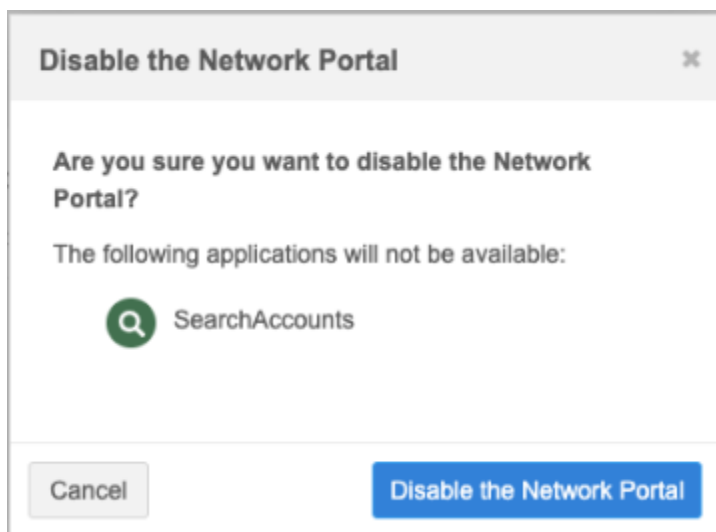


### Disable the Network Portal

If you disable the Network Portal, all of the applications will be disabled also. The widgets that are connected to the applications are not disabled because they might be used in other downstream integrated systems.

### Example

If you disable the Network Portal, the **Search Accounts** application will also be disabled. The application is connected to the `NetworkPortalSearch` widget; the search widget will not be disabled because you might also be using it in another system.





### *Provide access to users*

Three types of users can access the Network Portal:

- **Network Portal users** - Can sign into the Network Portal login page using their Portal Username.

This is a new user type that can access only the Network Portal and Network Widgets. This user is also useful if your organization doesn't use single sign-on. Portal Users will access the Network Portal directly from the login page.

For more information about this new user type, see the "Users" section in these Release Notes.

- **SSO users** - Sign in using the SSO button (managed by the identity provider (IdP)) on the Network Portal login page or through your SSO dashboard.  
Any user that signs into Network or the Network Portal using SSO is automatically added to the `SSO Users` user group.
- **Network users** (Standard Users, Data Stewards, Data Managers, System Administrators, and System and Data Admins) - Sign into using the Network Portal login page or through the Network UI.

Integration Users do not have access to the Network Portal; they have access only to the Network API. Integration Users can be added to user groups that have access to the Network Portal, but these users will be unable to sign in.

### *Support for single sign-on*

Single sign-on users can log into the Network Portal using the SSO button on the login page. With some SSO providers, such as Okta® and Microsoft® Azure® AD®, IT admins can create a bookmark application for users to sign into the Network Portal directly.

For more information about using SSO, see the following topics in the *Veeva Network Online Help*:

- [Configuring single sign-on in Network](#) (general guide)
- [Configuring single sign-on with Okta](#)
- [Configuring single sign-on with Microsoft Azure AD](#)

### **SSO URL**

If single sign-on is configured for the Network instance, an SSO URL displays on the Network Portal settings page. You can bookmark and provide links to this URL to allow users to sign into the Network Portal automatically via SSO.



**Network Portal Settings & Permissions**

Back Launch Portal Save

Details

Status  Enabled

Portal SSO URL `https://dev-832131.oktapreview.com/app/veevasystemsdev832131_pmpush4_1/exkumt047tAip9rML0h7/sso/saml?RelayState=https%3A%2F%2Fpmpush4-307.vdmdev.com%2Fportal%2F`

Logo  Recommended size (254 x 40px)

Network Portal

The **Identity Provider Login URL** in your SAML settings must be configured (**Settings > SSO Settings**) for the SSO URL to display.

SAML for Single Sign-On

Enable SAML for Single Sign-On

SAML Version \* 2.0

SAML User ID Type \* Federation ID

Issuer \* `http://www.okta.com/exkfi8zpxwlK9gIK70h7`

Identity Provider Certificate \*  Existing Certificate

Identity Provider Login URL \* `https://dev-832131.oktapreview.com/app/veevasystemsdc`

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

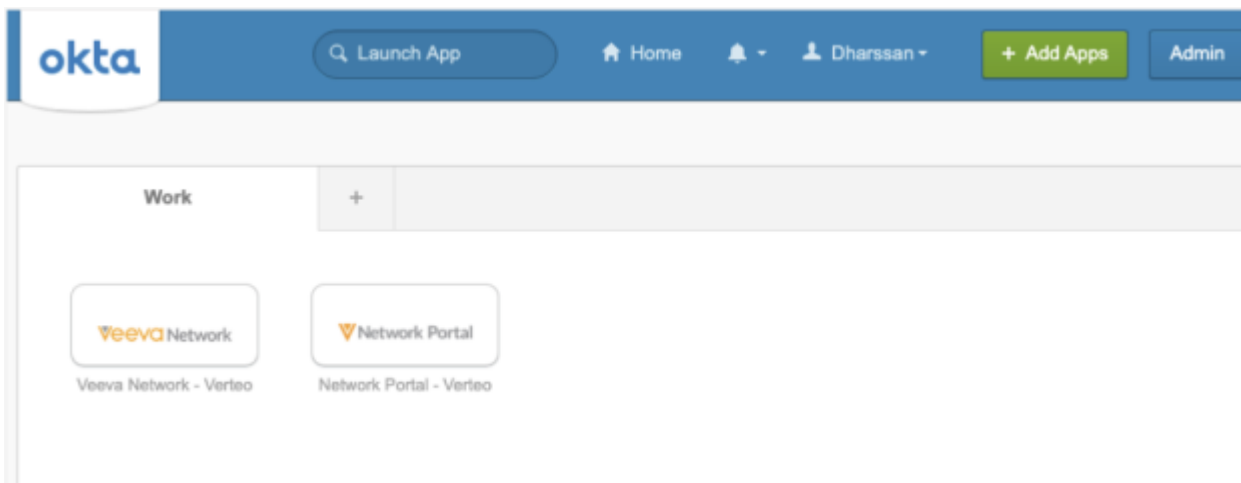


### Creating an Okta bookmark

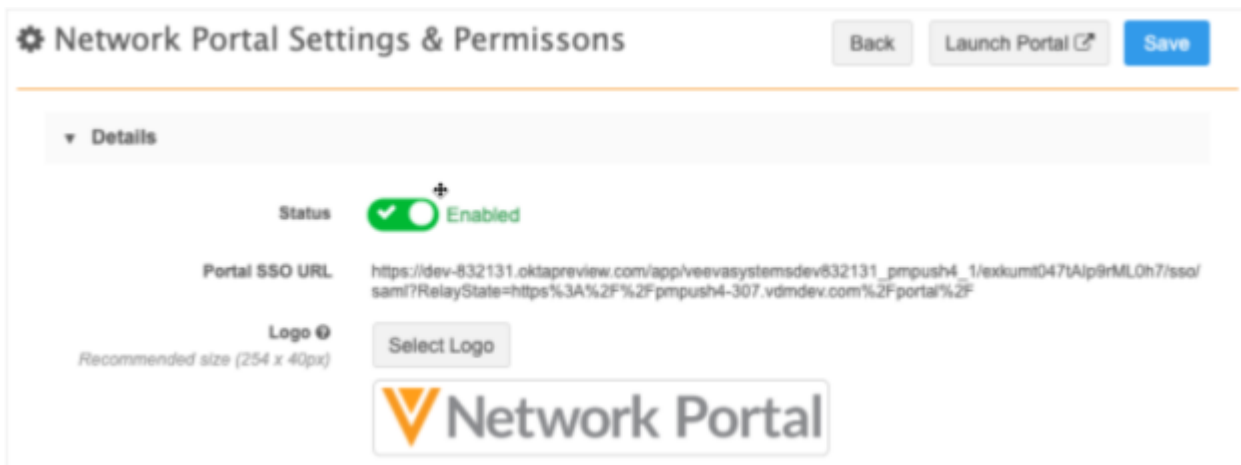
From Okta, Okta admins can create a tile for users to sign directly into the Network Portal via SSO.

#### Example

Users can click on the "Network Portal - Verteo" application to log into the Network Portal directly from Okta.

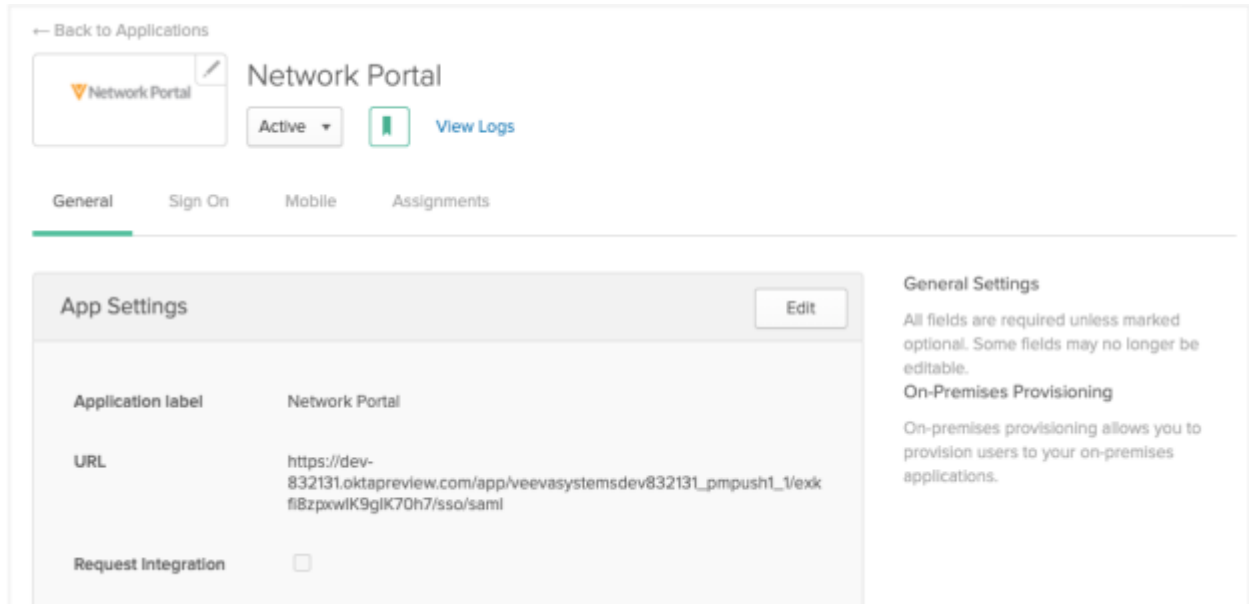


For the bookmark URL, use the SSO URL on the Network Portal settings and permissions page.





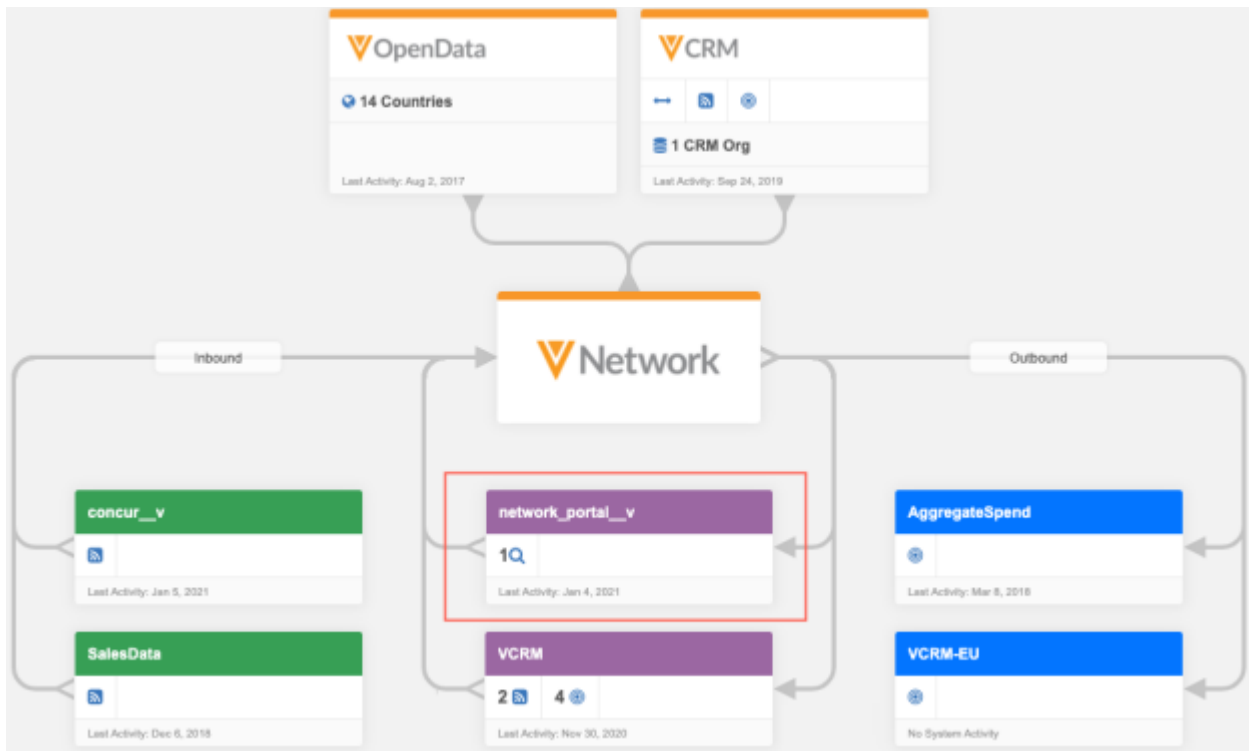
### Example Okta bookmark configuration



For more information, see [How to Create a Bookmark App](#) in the Okta Help Center.

### Integration dashboard

The Integration Dashboard is a single-view of all of your Network instance's integration activities. The Network Portal displays in the bi-directional list under the system name, `network_portal__v`.





### Audit details

Administrators can use the audit logs to track logins and changes to the Network Portal and its applications.

### Logins

The Login Audit History tracks all user log ins to the Network Portal.

### Network Portal configuration changes

The System Audit Log displays any changes that are made to the Network Portal:

- Status of applications and the Network Portal
- Network Portal settings
- Application settings

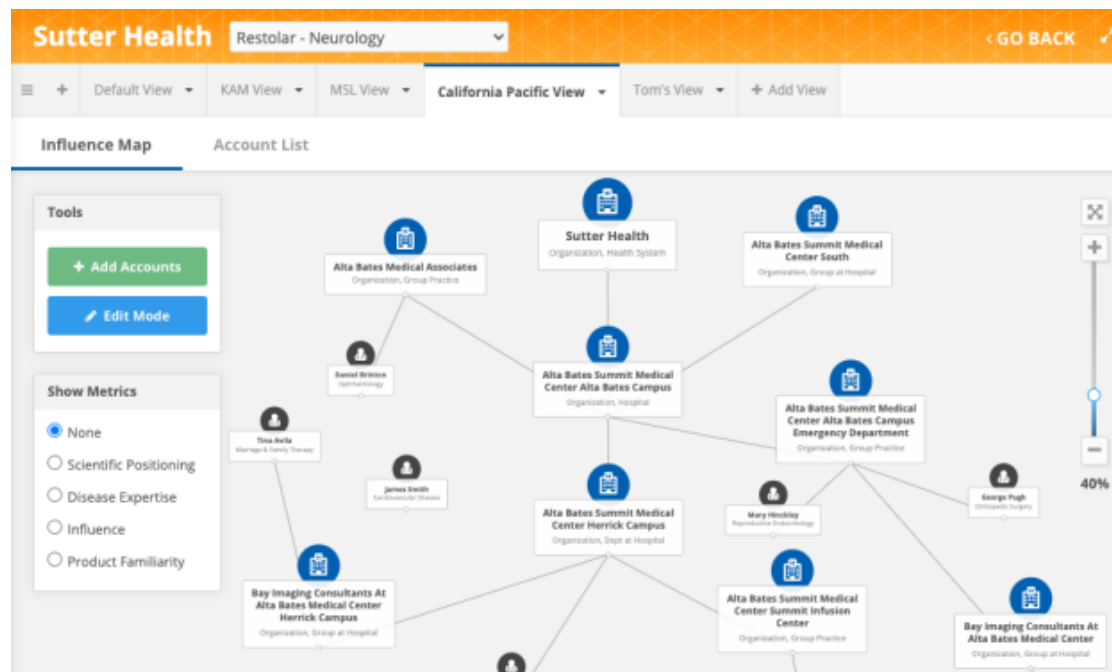
### Configuration Management

Network widgets and applications cannot be exported to a target environment.

### AFFILIATION WIDGET AVAILABILITY

20R3.1

The Affiliation widget is now generally available. It was introduced in version 19R3.0 for early adopters. Use the widget to create influence maps for your health systems.



The widget is not available by default. Contact Veeva Support to enable the widget configuration for your Network instance.

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



## AFFILIATION WIDGET VIEWS

20R3.1

The Affiliation widget now supports creating multiple views to provide more control and flexibility for your Influence Maps. Creating different views of your health care system enables you to customize your view without limiting other users.

Views can be used for the following purposes:

- **Team Views** - Create a view for each team that is focused on a different part of the health system so they can manage their views separately from each other. For example, for a given health system, you might have an MSL View, a KAM View, and a Reimbursement Manager view.
- **Segmented Views** - Create views for each of the smaller hospitals or geographical area within a health system.
- **User views** - Each user can create a view for their own purpose. For example, Mary can create a view called Mary's View.

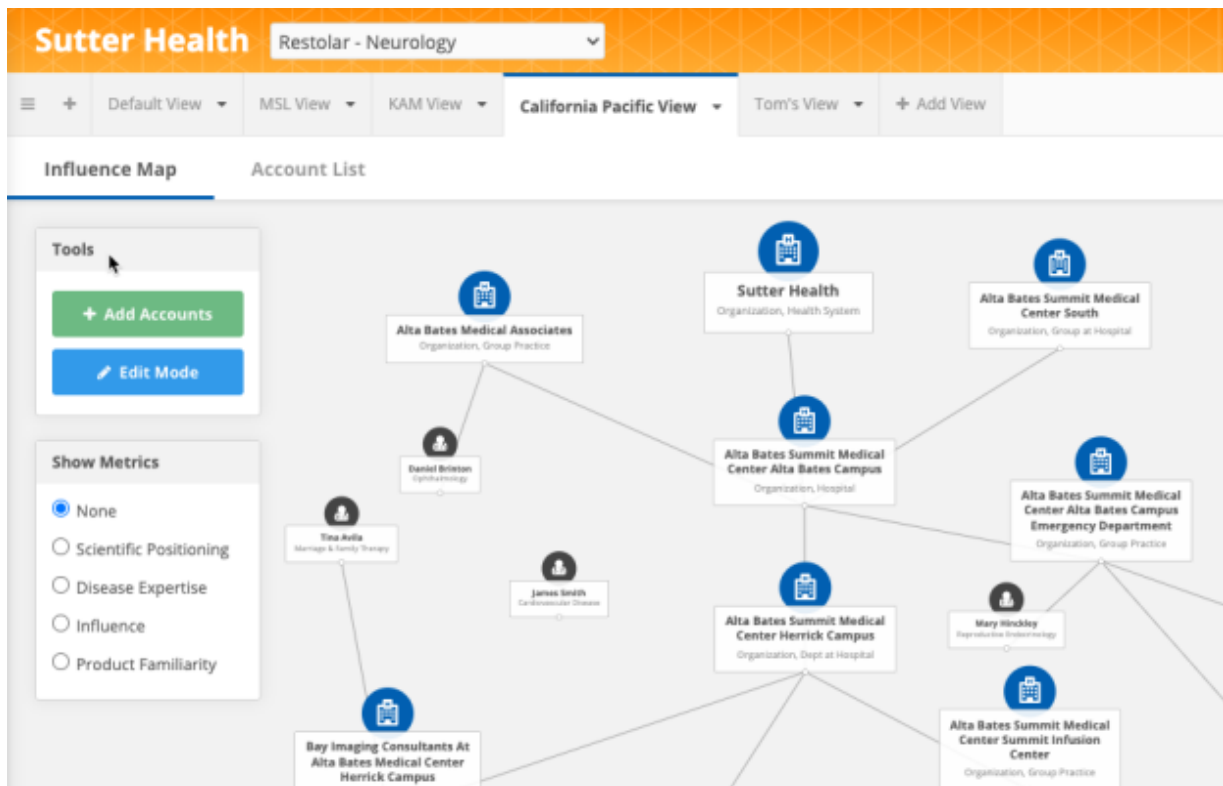
This enhancement is enabled by default if the Affiliation widget is enabled in your Network instance.

### About views

Views are specific to each health system and product/therapeutic area combination. All views are available to all users that have access to the affiliation widget.

### Example

The health system, Sutter Health, has several views created for the **Restolar - Neurology** product/therapeutic area combination. All users can view and edit these views.

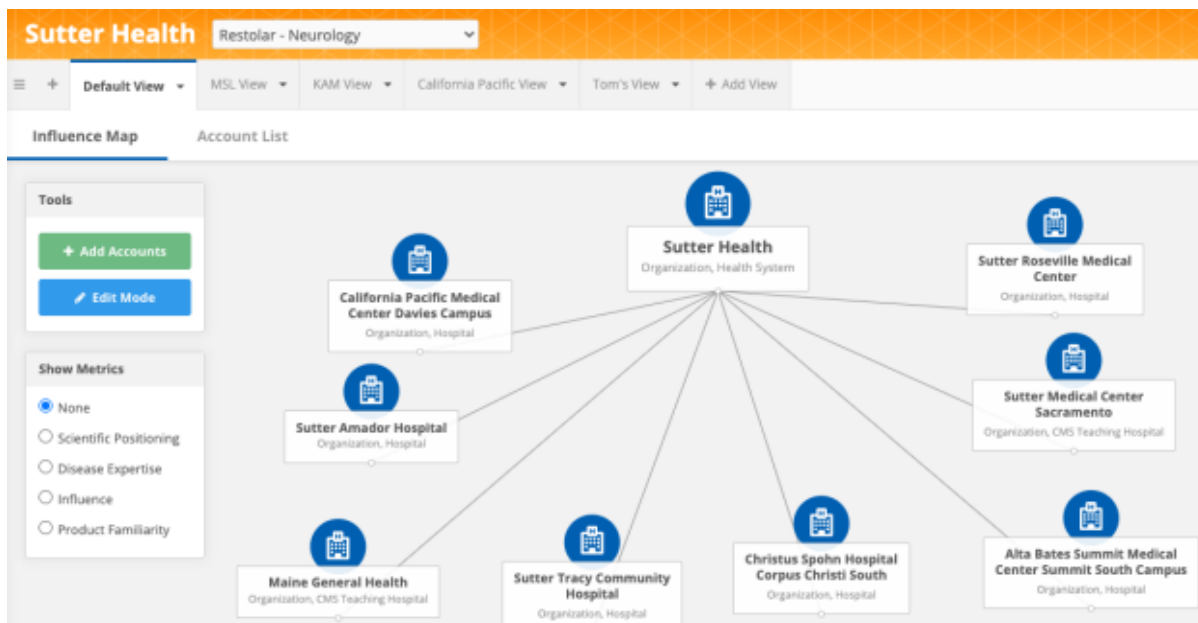




### Different types of views

- **Default view** - The existing influence map canvas is the default view and the only view that HCO and HCP data can be loaded into.

For existing customers, your influence map will become a default view to preserve your current map.



The name of the view cannot be changed in the widget. To change the view name, contact Veeva Support.

- **Standard views** - Veeva can create standard views for each of your health systems; for example, a KAM view and MSL view. These views cannot be changed by users. Submit a ticket to Veeva Support to help you to create these views. Each standard view is pre-populated with the health system.
- **Custom views** - Users can create views for the health system that are specific to their own needs.

### Summary of behavior for different types of views

Action	Default View	Standard Views	Custom Views
<b>Create View</b>	This view is created by default.	Contact Veeva Support. Standard views can be created for product / therapeutic areas.	All users can create custom views in the widget.
<b>Rename view</b>	Contact Veeva Support. The view cannot be renamed in the widget.	Contact Veeva Support. The names cannot be changed in the widget.	Users can change the name in the widget.



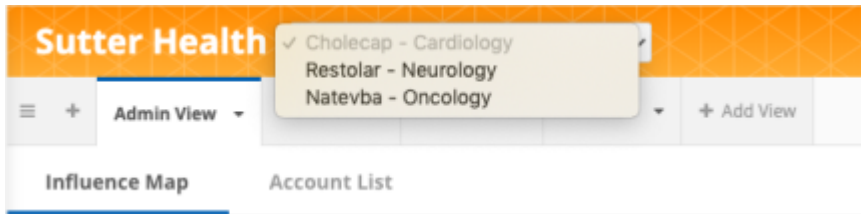


Action	Default View	Standard Views	Custom Views
<b>Add Records</b>	Data Loading - Load Account Link objects and have the records display on the influence map.  Search widget - Creating add requests	Search widget - Creating add requests.	Search widget - Creating add requests.
<b>Add Relationships</b>	Data Loading - The relationship filter in the widget configuration is applied for new relationships (existing behavior)  Draw relationships on the Influence Map.	Data Loading - The canvas filters decide which relationships are loaded.  Draw relationships on the Influence Map.	Data Loading - The canvas filters decide which relationships are loaded.  Draw relationships on the Influence Map.
<b>Delete view</b>	All views can be deleted by users in the widget.		

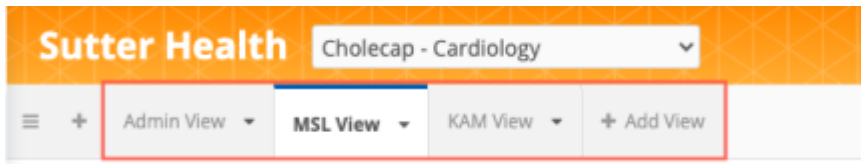
### Accessing views

Views are specific to each product / therapeutic area combination for a health system.

1. When you open a health system, the product / therapeutic area displays beside the name. Choose a product/therapeutic area from the list.



2. The list of active views are located in tabs under the health system name. The views display in the order that they were created, but the order can be rearranged.



The view that you had open last will display. If that view has been removed, the first tab in the product/therapeutic area opens.

3. Click a tab to open a different view.



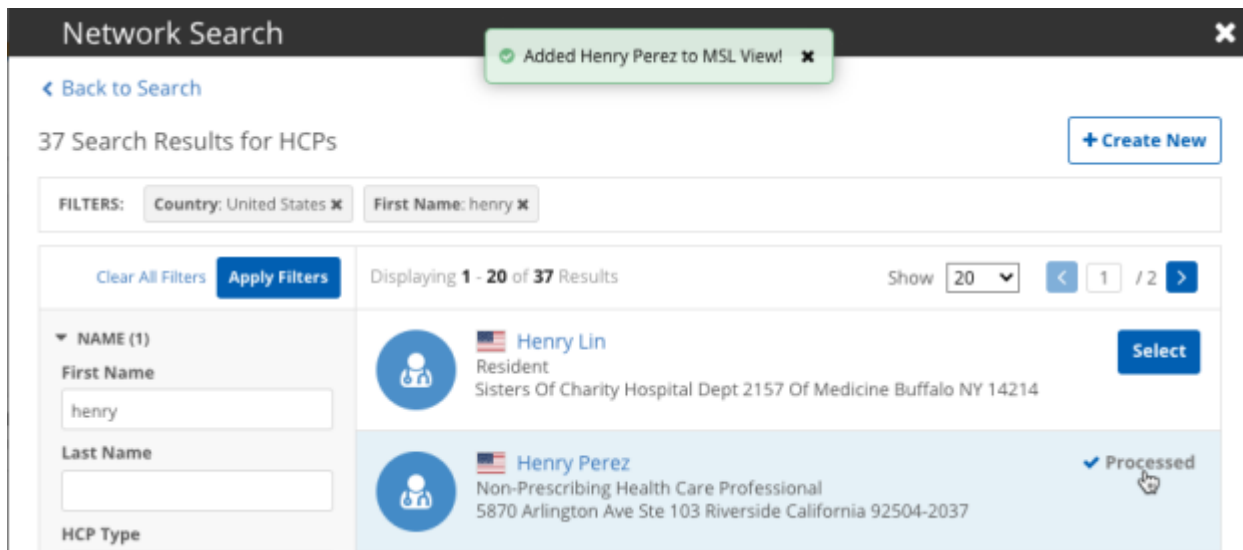
### Editing views

When you make changes to a view, the change occurs only to the current view; the other views are not updated.

You can make the following changes:

- **Adding and removing HCPs and HCOs**

If you add an account using the search widget, the account is added to the current view only.



Similarly, removing an account removes it from the current view only. It does not create a data change request to permanently remove the account.

- **Removing the health system**

Users can remove the health system from the current view. Previously, the health system could not be removed.

If it is added back to the view using the search widget, a new position is generated for the health system on the Influence Map. Create a relationship to existing accounts.

- **Moving nodes**

The position of each node is now saved to the Influence Map canvas. If a user moves a node, its position is saved for that view.

- **Adding and removing relationships**

Relationships between HCP-HCO, HCO-HCO, and HCP-HCP can be added to or removed from your view. When a relationship is added, a data change request is created and the current view is updated.

- **Viewing the account list**

The Account List applies to the current view; only the HCPs in the view display in the list.



Account	Affiliations	Scientific Positio...	Disease Expertise	Influence	Product Familiar...
<b>Francis Charlton Jr</b> 1 Shrader St Ste 640 San Francisco CA 94117-1018	No Affiliated HCPS	High	High	High	Very High
<b>Gauri Kelekar</b> 3838 California St Ste 707 San Francisco CA	No Affiliated HCPS	Neutral	High	Very High	Neutral
<b>James Smith</b> 96 Jonathan Lucas St Ste 803 Charleston SC 29425-8900	No Affiliated HCPS	High	Very Low	Very High	Low
<b>John Duffy</b> 640 12th St SE Salem OR 97301-4001	No Affiliated HCPS	Very High	High	High	Low
<b>John Rackley</b> 5950 Saratoga Blvd Corpus Christi TX 78414-4100	No Affiliated HCPS	Low	Very High	Very Low	Very High

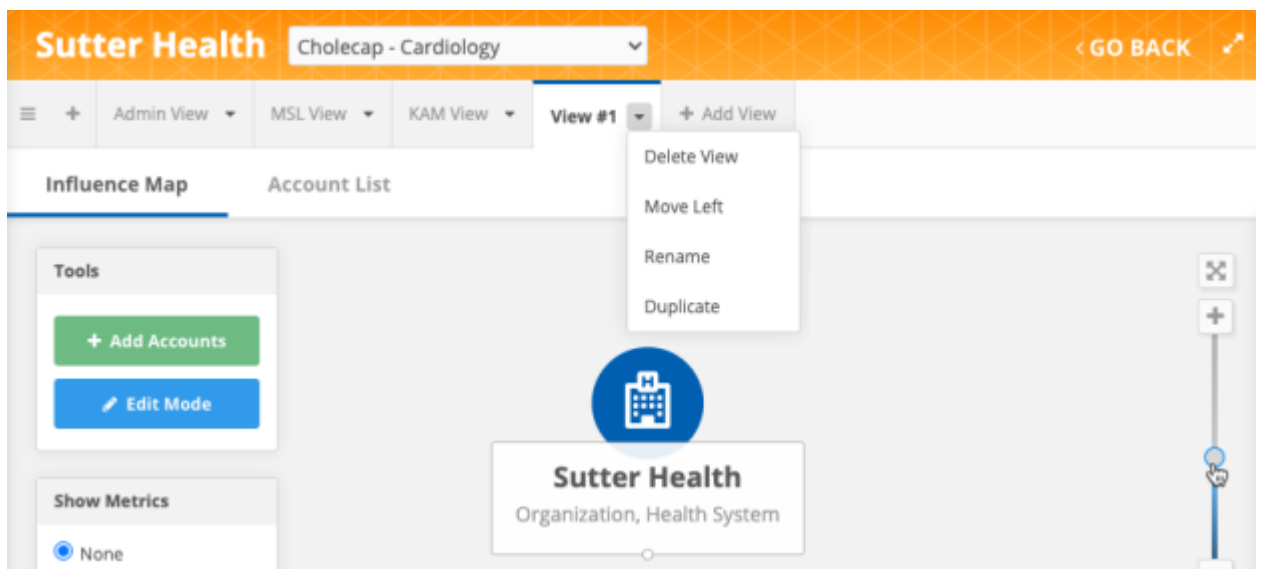
### Creating a view

You can have unlimited views. There is no security or permission rules for views; all users can see the views for each product/therapeutic area.

To add a view

1. Open a health system and choose the product/therapeutic area from the list.
2. Click **+ Add View**.

A new tab is created with the default name **View #<1>**. The health system is added by default.



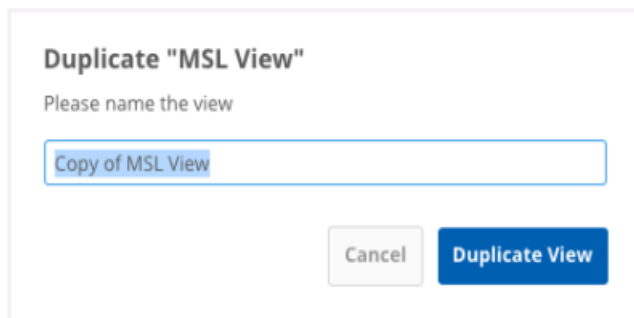


3. Click the arrow beside the view name to see the options:

The following actions are available:

- **Delete View** - The view will become inactive and will no longer display. Default, standard, and custom views can be deleted as long as there are two views available within the health system and product/therapeutic area. If there is only one active view, the **Delete View** option is dimmed.  
Deleting the view does not impact the entities or relationships.
- **Move Left / Move Right** - Reorder the views by moving the current view. Tabs can also be dragged to different positions.  
The view position is not user-specific. All users have the
- **Rename a view** - Supported for custom views only.  
Name have the following rules:
  - Can contain a maximum of 50 characters.
  - Can contain spaces, letters, numbers, and some symbols.
  - Must be unique for the health system and product/therapeutic area.
- **Duplicate** - Clone a view as a custom view with a new name. The cloned view includes all of the accounts, relationships, and account positions.

In the dialog, type a name for the cloned view.



**Loading data to your default view**

A new data model field, `account_link_load_to_default_view__v`, has been added for the Account Link object so records can continue being loaded into your default view. The field is enabled by default if you have the Account Link object in your Network instance.

Include the field with a **Yes/True** value in your source subscription file. If the account link record matches the health system, product /therapeutic area, the HCPs and HCOs will display in your default view.



## AFFILIATION WIDGET - RELATIONSHIP DETAILS

**20R3.1**

Users can now capture more information about HCP-HCO and HCO-HCO relationships when they are created or edited in the Influence Map. Previously, only HCP-HCP relationships could be edited. This provides more information for users and enables you to report on connection types using Network reporting.

**Create HCO-HCO Relationship**

Select a Parent Account  
The parent account can not be changed later.

Dekalb Regional Health System  
 Bascom Palmer Eye Institute At Anne Bates Leach Eye Hospital

Connection Type \*

Comments

Cancel Create Relationship

This enhancement is available by default. Administrators can update the widget configuration to define custom fields that display when users create or edit relationships in the Influence Map.

### *Adding relationship fields*

Administrators can add relationship criteria to the Affiliation widget configuration.

1. In the Admin console, click **Widgets & Portal**.
2. Create a new widget or edit an existing one.
3. In the widget configuration, find the new section called **Define Fields to be Populated for ParentHCO Relationships**.
4. In each section (**HCO to HCO** and **HCP to HCO**) choose the custom fields that you want users to complete when they add or edit a relationship. There is no limit to the number of fields that you can add.



**Define Fields to be Populated for ParentHCO Relationships**

**HCO TO HCO RELATIONSHIPS**  
Define the additional fields to be filled out when creating HCO to HCO relationships.

☰	KAM Connection Type	✕
☰	Connection Type	✕
	<input type="text"/>	+ Add Field
HCP T	Connection Type	
Define	Important Account	
	KAM Connection Type	
☰	Oncology?	✕
☰	Referral Outside of Health System?	✕
	Referral Strength	
		+ Add Field

**Supported field types**

The fields must be custom fields so the changes can be auto-approved.

The following types are supported:

- Reference - The reference values that display in the widget will be filtered based on the HCP's country.
- Boolean Checkbox
- Text
- Integer / Number

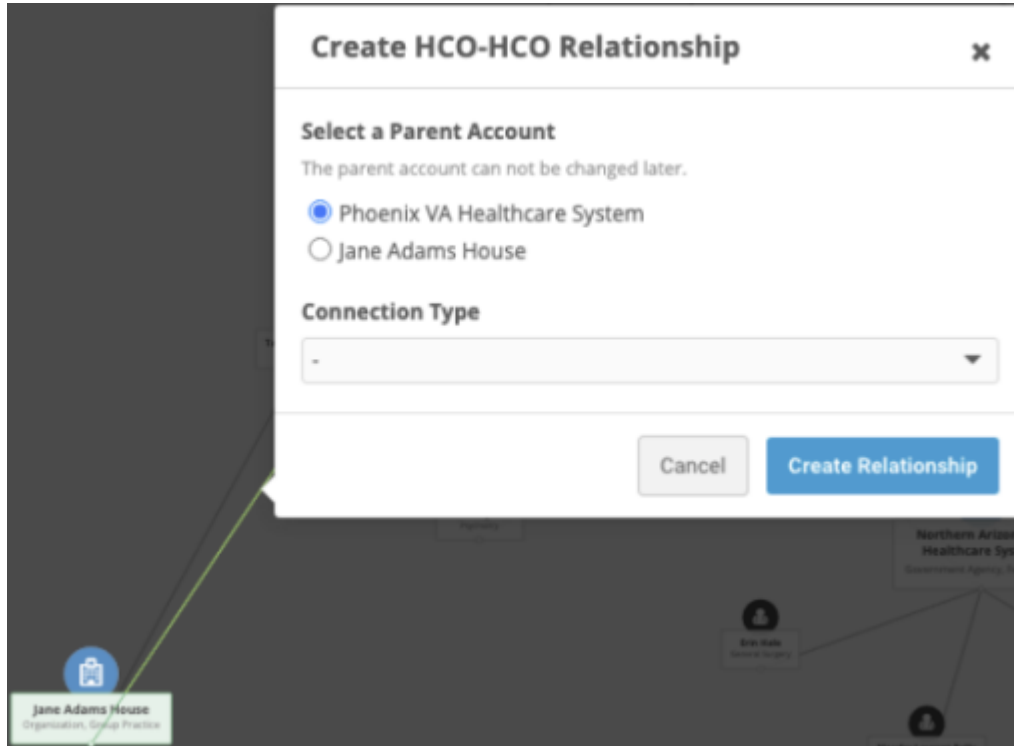
Primary fields and system fields are not supported.

5. **Save** your changes.



### Add or edit relationships

When users add or edit HCP-HCO or HCO-HCO relationships in the Affiliation widget, the fields display so users can add details.



When HCO-HCO relationships are created, the **Select a Parent Account** setting is automatically added to the dialog.

When you click **Create Relationship**, a data change request (DCR) is submitted with the additional fields. The relationship is automatically approved as a local relationship; the DCR is not routed to Veeva OpenData.

Fields display if the following criteria is met:

- The field is enabled
- It is available for the HCP/HCO's country. When you create an HCO-HCO relationship, the fields must be available for both countries.
- The field is not read-only.
- The field is not a restricted field for the user.

If no fields display, define the parent account and create the relationship.

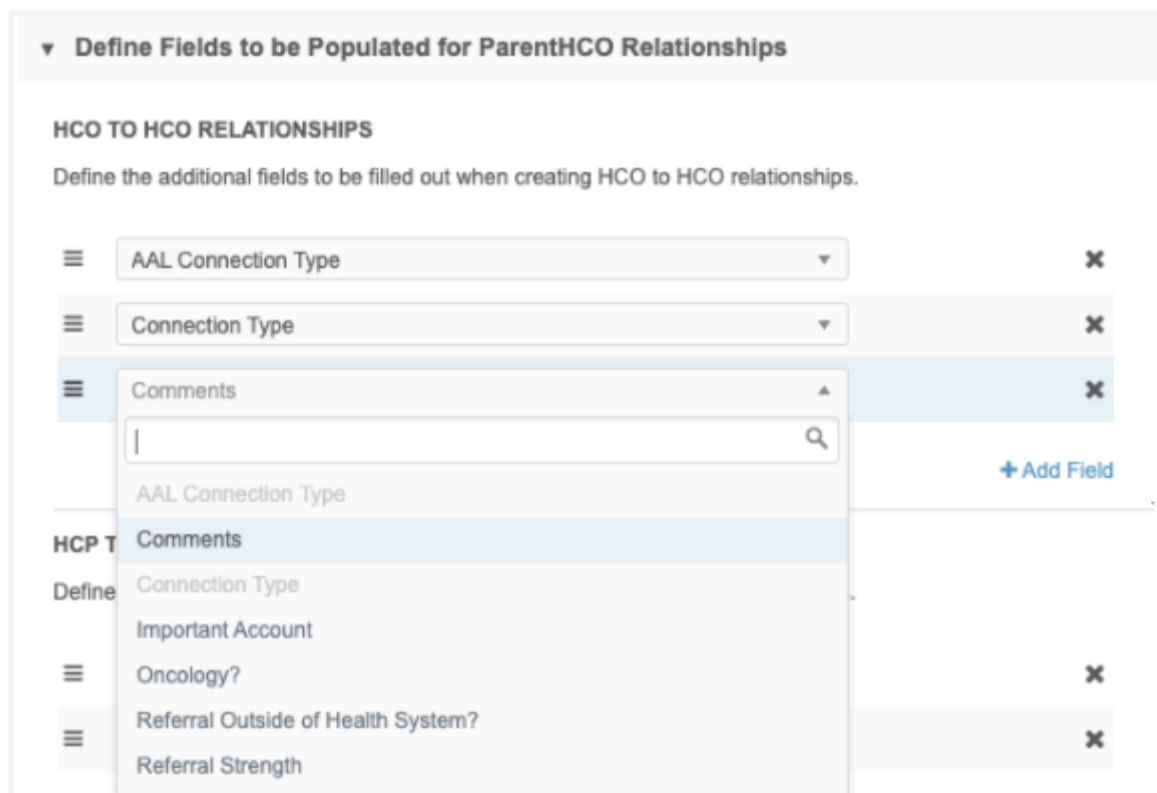


## Edit a relationship

Relationships can also be added when you edit a relationship.

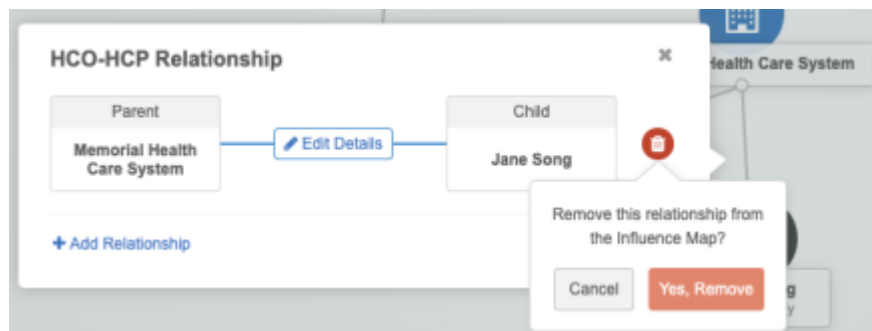
- To edit a relationship, click the **Edit** icon on the line between the nodes.
- On the pop-up that displays, click **Edit Details**.

The **Edit Relationship** dialog displays the fields so you can add more information about the relationship.



## Delete relationships

You can delete a relationship from the **Edit** dialog or using the **Remove** button on the **Edit Relationship** dialog.



When you delete relationships, they are only removed from the Influence Map; they are not inactivated.

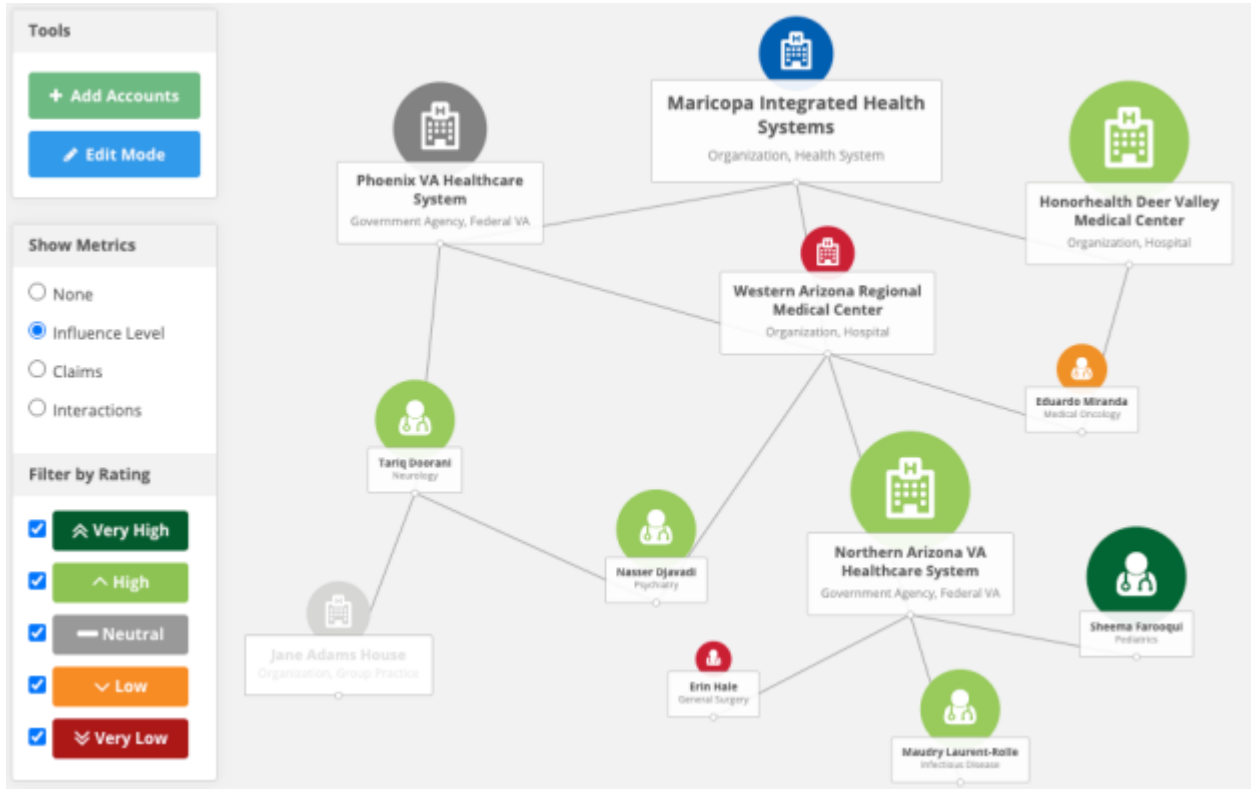




## AFFILIATION WIDGET - HCO METRICS

20R3.1

You can now see metrics displayed for HCO objects in the Affiliation widget. Previously, metrics displayed only for HCPs. Using metrics enables you to visually understand custom defined metrics for HCOs.



This enhancement is not enabled by default. Developers can enable the HCO metrics by including a property in the widget code.

### Viewing metrics

The metrics are applied to the following areas in the widget:

- Metrics menu in the Influence Map
- Profiles
- Edit metrics

**Note:** Metrics do not display for the main health system.

### Enable HCO metrics

To see HCO metrics in your Affiliation widget, add the following to the widget code that was automatically generated by Network.



```
display-hco-metrics = "true"
```

This code was added to the <body> of your internal application.

```
<body>
  <div id="widgetContainer">
    <veeva-network-affiliation-widget
      id="widgetEl"
      auth-domain="https://pmpush6-307.vdmdev.com"
      widget-name="InfluenceMap"
      display-hco-metrics="true"
      widget-id="MzA30zs7aW5mbHVlbmNlbWFWX19j"></veeva-network-affiliation-widget>
    </div>
```

### SEARCH WIDGET

20R3.1

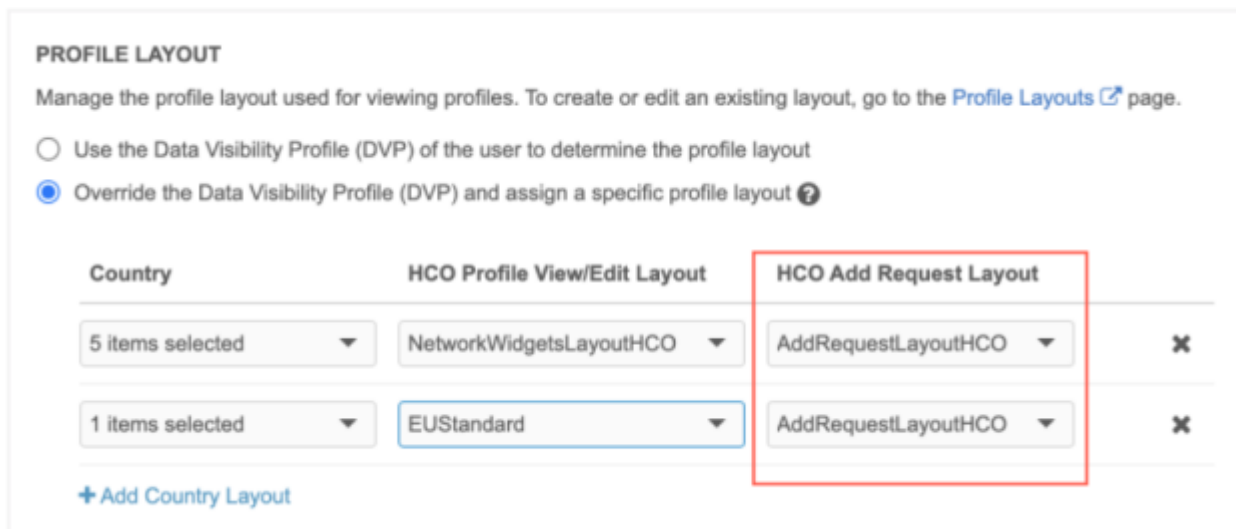
Administrators can configure search widgets to use a specific profile layout for add requests that can be different than record profiles and change requests. This gives you more flexibility over the forms that display for users. Using a limited profile layout can generate better add requests because you can include only the fields that are essential for creating a new record.

This enhancement is enabled by default in your Network instance.

#### Define a profile for add requests

System Administrators and System and Data Admin users can update the search widget configuration to specify a profile layout.

1. On the Network menu bar, click **Widgets & Portal**.
2. Open an existing widget or create a new search widget.
3. In the **Entity Management** section, find the **Profile Layout** section on the **HCO** and **HCP** tabs and ensure that the **Override the Data Visibility Profile and assign a specific layout** option is selected.





4. Expand the **Add Request Layout** list and choose a layout. This is a required field, but can be set to the same layout as the **Profile View/Edit Layout** field.  
All of the standard and custom profile layouts in your Network instance display.
5. **Save** your changes.

For information about creating custom profile layouts, see [Configuring profile layouts](#) in the *Veeva Network Online Help*.

When users create an add request in the search widget, they will see the layout that you defined. If a country isn't defined, the profile layout defined in the user's data visibility profile displays.

### New Health Care Organization Save

---

#### Primary Information

Corporate Name * <input type="text"/>	HCO Type Organization, Other ▼
Primary Country United States	Major Class of Trade Organization ▼
Primary Specialty - ▼	Other Specialties No options selected ▼
Status Active ▼	NPI <input type="text"/>

#### Addresses

No active Addresses available.

[+ New Address](#)



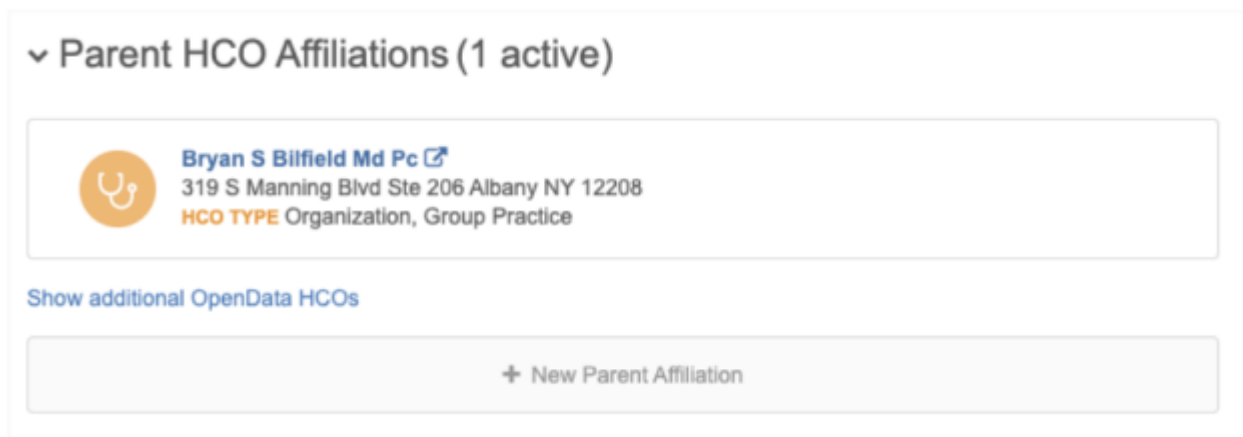
## Profiles

### VIEW ADDITIONAL AFFILIATIONS

**21R1**

On an OpenData record profile, you can now view affiliations that have not yet been downloaded to your Network instance. You can download the HCOs using the **Show additional OpenData HCOs** link. Additional HCOs can display in the **Parent HCO Affiliations** section on HCP profiles and the **Parent HCO Affiliations** and **Child Affiliations** sections on HCO profiles.

This feature is supported only on OpenData record profiles that are downloaded in your Network instance.



This feature is not enabled by default. Administrators can enable this feature for their Network instance.

### *Enable the feature*

The feature is not enabled by default in existing Network instances.

1. In the Admin console, click **Settings > General Settings**.
2. Click **Edit**.
3. In the **Search** section, select **Show Additional OpenData HCOs**.

**Note:** This feature cannot be enabled if the **Search OpenData** feature is not enabled.

For new Network instances, the feature is enabled by default; however, administrators must enable the **Search OpenData** feature before additional HCOs are available to view.

### *View additional HCOs*

When you are viewing an OpenData record, a link displays at the bottom of the **Parent HCO Affiliations** (HCPs and HCOs) and **Child Affiliations** (HCOs) sections. Click the link to display the list of related HCOs that have not yet been downloaded to your Network instance.

**Note:** The link displays on full record profiles only, it does not display on profile previews that are available in some Network features (for example, Network Explorer and profile layouts).



A pop-up displays the missing related HCOs in alphabetical order. A count of the HCOs displays in the pop-up.

The screenshot shows a pop-up window titled "Additional OpenData HCOs" with a close button in the top right corner. Below the title is a header "HCO RECORDS (8)". The main content is a list of five HCO records, each with a circular icon, a title, a description, an address, and a download icon. The records are:

- Community Care Physicians Interventional Radiology At Albany ...**  
Organization, Group at Hospital  
Dept Of Radiology 47 New Scotland Ave Albany NY 12208-3412
- Emergency Medicine Physicians Of Albany County Pllc**  
Organization, Group at Hospital  
600 Northern Blvd Albany NY 12204-1004
- Lasik Plus Vision Center**  
Organization, Clinic  
12 Corporate Woods Blvd Albany NY 12211-2524
- Price Chopper Operating Co Inc**  
Pharmacy, Retail  
920 Lark Dr Albany NY 12207-1300
- Prime Care Physicians Pllc John M Bashant Md**  
Organization, Group Practice  
5 Palisades Dr Ste 200 Albany NY 12205-6433

At the bottom right of the list, it says "8 Records in OpenData".

Considerations for HCOs that display:



- HCOs must have an Active record state and be related to the entity with Active relationships.
- Unsubscribed records will display if they are Valid and Active.
- HCOs that are candidate records do not display.
- HCOs can be for any country; they don't have to be for the same country as the related entity.

If there are no additional HCOs to download, the pop-up displays the following message: There are no additional OpenData HCO records to download for this record.



### Download the HCO

You can download the record to your Network instance.

1. On the **Additional OpenData HCOs** pop-up, click the **Download from OpenData**  icon.  
If you want to view the record before you download, click the HCO name to open the record in a new browser window. On the record profile, click the **Download from OpenData**  icon.
2. In the pop-up, confirm that you want to download the record.  
When the download is complete, the **Download from OpenData** icon is removed from the record.
3. Refresh the original record profile to update the list of affiliations.

### User requirements

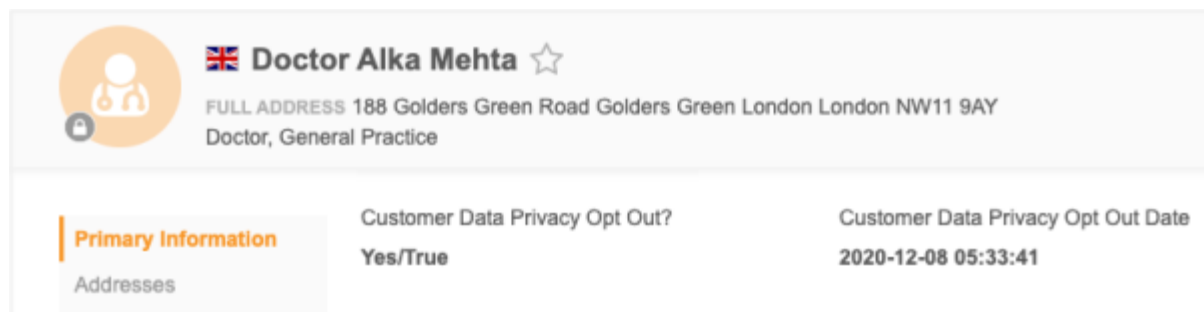
To view additional HCOs, you must have the following data visibility profile permissions:

- Access to the HCO records through your country permissions
- **Can Search OpenData Instance** permission
- **Can download/sync records from OpenData instance** permission

### DATA PRIVACY OPT OUT DATE

20R3.1

The date that the data privacy opt out flag is set to **True** is now captured in a new field so you can easily see the date in record profiles and use it in reporting queries. Previously, the date was only set in the revision history. Now, the date is explicitly captured and available in the new HCP field.



The screenshot shows a patient profile for Doctor Alka Mehta. The profile includes a name, a star icon, and a full address: 188 Golders Green Road, Golders Green, London, NW11 9AY. Below the address, there is a section for 'Primary Information' with a sub-section for 'Addresses'. This section contains two fields: 'Customer Data Privacy Opt Out?' with the value 'Yes/True', and 'Customer Data Privacy Opt Out Date' with the value '2020-12-08 05:33:41'.

This enhancement is enabled by default in your Network instance.

### Opt out date fields

Two new data model fields are added to the HCP object:

- `data_privacy_opt_out_date__v` - Opt out date for OpenData -managed opt-outs.
- `data_privacy_opt_out_date__c` - Opt out date for customer-managed opt-outs

The fields are populated with the date whenever a record is opted-out through a change request (on the profile page or using the API) or through a source subscription.



### Standard field for OpenData opt-outs

The `data_privacy_opt_out_date__v` has the following behavior:

- Automatically enabled for every country that uses the `data_privacy_opt_out__v` flag.
- Captures the date that the opted-out flag was set to **True** by Veeva OpenData.
- Automatically added to standard profile layouts so it displays on record profiles. It can be added to custom profile layouts.

**Note:** The label for the `data_privacy_opt_out_date__v` field has been changed to **OpenData Data Privacy Opt Out**. Previously, the label was **Data Privacy Opt Out**.

### Custom field for local opt-outs

The `data_privacy_opt_out_date__c` field has the following behavior:

- Not enabled by default. It can be enabled for any countries that already use the data privacy opt-out flag, `data_privacy_opt_out__c`. If you enable the opt-out flag for a country, you should enable the `data_privacy_opt_out_date__c` field as well.
- Captures the date that the opted-out flag is set to **True** in your Network instance.
- Can be added to custom profile layouts so it displays on record profiles; it is not automatically added.
- Can be updated using source subscriptions.
- Date value will be blanked-out if the `data_privacy_opt_out__c` flag is changed from **Yes/True** to **No/False** or **No Value**,

### *Backfilling the date for locally managed opt-outs*

The date can be added for locally managed HCP records that you have previously flagged as opted-out in your Network instance. The opted-out date is contained in each record's revision history. Run a query to retrieve the date and use a source subscription to add the date to the opted-out records. The Data Updater cannot be used for this process because system fields cannot be updated using that feature.

**Note:** Please complete the backfill process in a timely manner; it will not be available indefinitely. The standard and custom `data_privacy_opt_out_date` fields can be updated through source subscriptions now, but they will become system managed fields (not editable) in a future release.



## SQL query

Use this query to retrieve the opt-out date from the revision history. The date from the revision history will be used to backfill the `data_privacy_opt_out_date__c` field.

```
SELECT
    DISTINCT hcp_vid,
    record_state,
    opt_out_switch_to_Y_date
FROM
    (
        SELECT
            h.vid__v AS hcp_vid,
            h.record_state__v AS record_state,
            LEFT( hr.created_at, 10 ) || 'T' || RIGHT(
hr.created_at, 8 ) || 'Z' AS opt_out_switch_to_Y_date,
            rank (
                ) over (
                    partition BY h.vid__v
                    ORDER BY
                        created_at DESC
                ) AS rank
        FROM
            hcp h LEFT JOIN hcp_revision hr
                ON h.vid__v = hr.vid__v
        WHERE
            h.data_privacy_opt_out__c = 'Y'
            AND hr.data_privacy_opt_out__c = 'Y'
    ) t
WHERE
    rank = 1 ;
```

**Important:** Use this query so the time is returned in GMT (example date format with timezone: 2016-01-12T23:13:17Z). If you create your own query, ensure that the timezone is returned in this format (includes 'Z') so the source subscription identifies the time as GMT.

To backfill the opted-out date in records:

1. Run a report to retrieve the opted-out date from the revision history.
  - On the Network menu bar, click **Reports > SQL Query Editor**.
  - Add the query to the query box and run the report.
  - Download the report results as a .csv file.
  - Save the file on your FTP server so it can be used in the source subscription.

The file should have two columns only and must contain the field names as the column header.

1	vid__v,data_privacy_opt_out_date__c
2	932585026924446091,2016-03-17T18:13:12Z
3	618948255232836635,2016-03-17T18:13:12Z
4	





2. Create a system to use for the source subscription.
  - In the Admin console, click **System Interfaces > System**.
  - Click **Add System**.
  - Type a **Name**. For example, call the system `opt_out_date_backfill`.
  - Type a **Description** and accept the remaining default values.
  - **Save** the new system.
  - In the **Confirm Edit System** dialog, click **OK**.

**Note:** A new custom key will be added for this source system on the records that you backfill.

3. Create a source subscription to update the opted-out records with the date.
  - In the Admin console, click **System Interfaces > Source Subscription**.
  - Click **Add Subscription** and choose **Use Classic Mode** or **Use Wizard Mode**.  
These instructions include examples for Classic Mode.
  - Type a **Name** and **Description** for the subscription.
  - In the **System** field, choose the system that you just created.

**Details**

Name: Backfill\_opted\_out\_dates

System: opt\_out\_date\_backfill

Code: opt\_out\_date\_backfill\_c

Description: Opt Out Date Backfill

Status:  Enabled  Disabled

**Settings**

**GENERAL SETTINGS**

Allow File Reprocessing  Apply Updates & Merge

Job Error Log

- In the **General Settings** section, select the **Job Error Log**.
- In the **Match Settings** section, set the **Action for Unmatched & Suspect Match** to **No Action**.

This ensures that new records are not created; this subscription is for updating existing records only.



- Accept the default values for the remaining settings.
- In the **Source Files** section, define the **FTP path** where you saved the report results (.csv file).

**Source Files**

FTP Path ?

---

**File Definitions** ?

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

[Add File](#)

- In the **Modelling & Normalization** section, add a model map. Field normalizations are not required.

```
[
  {
    "entity": "HCP",
    "from": "HCP",
    "attributes": [
      "HCP.* AS *"
    ],
    "customkeys": [
      {
        "value": "HCP.vid__v"
      }
    ]
  }
]
```

- **Network Expression Rules** and **Match Configuration** are not required for this backfill subscription.
- In the Job Schedule section, choose to schedule the subscription or manually run it.
- **Save** the subscription.

Manually run the subscription or wait until it is scheduled to run. The specified records will be updated with the opted-out date.



### Backfilling Veeva OpenData opt outs

Veeva OpenData will backfill the date for previously opted-out records. The updates will be included in your Veeva OpenData country subscription when it runs. The date will be available in reporting and it will be included in target subscriptions (for example, when opted out records are exported to Veeva CRM).

### Locally managed records that were converted from OpenData opt outs

If you have records that were opted-out in OpenData and converted into locally managed records, the opted-out date is not included in the OpenData subscriptions because updates to the converted record are blocked.

To backfill the Veeva OpenData opted-out date for any converted records that you may have in your Network instance, contact Veeva Support . They can provide the opted-out date for the Network entity IDs that you identify. You can use your source subscription to add the dates to your converted record for reference.

**Doctor Sirfraz Hussain** ☆  
 FULL ADDRESS Monton Street Moss Side Health Centre Moss Side Manchester Lancashire M14 4GP  
 Doctor, General Practice

<b>Primary Information</b>	Medical Practice Start Date	No value	<b>OpenData Data Privacy Opt Out Date</b> 2021-01-14 09:37:15
	Record State	<b>Valid</b>	Status <b>Active</b>
	Customer Data Privacy Opt Out?	No value	Customer Data Privacy Opt Out Date No value
	Addresses		
	Parent Affiliations		
	E-Contacts		
Phone Test			
Educational Information			

### Timezone considerations

The date and time that displays on the record profile might be different from the date and time that was loaded into the source subscription. This is expected.

The date and time that displays on record profiles uses the timezone of your local computer. The source subscription loads the opt out date using the GMT timezone - the provided SQL query intentionally specifies the timezone using 'Z' (GMT). So, all users (except users whose computer is in GMT timezone) will see an offset between the date/time that was loaded and the date/time that displays on the record profile.



## Inbox

### ADD REQUESTS

21R1

Add requests that have created a suspect match task now contain a link to that task. Data Stewards can click the task ID link in the **Status** section to open the suspect match's task.

This enhancement is enabled by default. The suspect match task links display only on requests created after this enhancement is released.

The screenshot displays the 'Add Request' form and a 'REQUEST SUMMARY' sidebar. The form includes fields for First Name, Last Name, HCP Type, Status, AMA Do Not Contact?, PDRP Opt Out?, and Associated with Kaiser?. The sidebar shows details for a request, including Task ID, Subject, Creator, Date Created, and a Status section with a link to a suspect match result.

### SUSPECT MATCH

21R1

Enhancements have been made to suspect match tasks to remove the ability to make field value choices that do not need to be processed for specific scenarios.

These enhancements are enabled by default in your Network instance.

#### *Hide field buttons for Under\_Review records*

Suspect match tasks that originate from add requests now only display the option to match or not match. Previously, the suspect match task displayed the options to accept field values on the Under\_Review record from the add request. These radio buttons no longer display so Data Stewards are only required to make decisions about field values on the subsequent change request page after the match is confirmed.

#### *Dim field buttons for HCP opt outs*

If an opted-out HCP record is the winner of a suspect match, the only field value that can be actioned is the Customer Data Privacy Opt Out? field. The buttons to accept all other field values will be dimmed. Opted-out records are read-only, so the Customer Data Privacy Opt Out? field is the only field that should be available to update.



Suspect Match Re

---

Fields	Suspect Match Record	Select the surviving record to merge into:
<input type="radio"/> All <input type="radio"/> Summary	<b>Furje Furje</b> Network ID: 939674730634772511 <a href="#">Select All</a>	<b>Surviving Record</b> <input checked="" type="radio"/> <b>Natan Natan</b> Network ID: 937170990543796303

← How were these matched? →

These records were manually matched.

Creator: data.steward.3.1@network.com  
Date Created: 2021-02-10 14:59:54 EST

---

▼ Primary Information

First Name	<input type="radio"/> Furje	<input checked="" type="radio"/> Natan
------------	-----------------------------	--

## Data model

### GEOCODES

**21R1**

Latitude and longitude fields are now populated and persisted for addresses in Spain.

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

The **Latitude**, **Longitude**, and **GeoAccuracy** fields are available using the **Extended Info** link on an address in a record profile.

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

### CLUSTER MANAGEMENT

**21R1**

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

- Spain - IQVIA™

A TPA must be signed with the third party cluster provider to use the cluster management feature. For more information, see the topic called [Managing clusters](#) in the *Veeva Network Online Help*.



## NEW COUNTRY SUPPORTED

**20R3.1**

A data model has been added for Singapore (SG).

The reference data is based on the Other Countries (ZZ) data model. The data model also includes the `alternate_last_name__v` field.

To view the data model for Singapore:

1. In the Admin console, click **Data Model** and choose the **Customer Master** data domain.
2. Select an object.
3. In the **Fields** section, expand the **Country** list and choose Singapore.
4. Repeat for the other objects.

Alternatively, click **Export Data Model** and filter the downloaded file to review the fields enabled for Singapore.

## Localization

English translations will be used for the reference data in the Network UI.

## FORMATTED NAME

**20R3.1**

The formula for the HCP formatted name is updated for some countries in Europe. Whenever records are loaded in your Network instance or DCRs are submitted, if there isn't a value for the `formatted_name__v` field, Network calculates the value using the available name fields. Internal rules are defined to identify the fields that are used to calculate the formatted name for a specific country. For example, most countries use the first name and last name but some countries also include a middle name, prefix (Hr.), or medical degree for an HCP.

These changes are enabled in your Network instance by default.

## Updates to formatted names

The updates to the formatted name include the following enhancements:

- Language-appropriate translations for prefixes and medical degree
- Middle Name is used in countries where this field is captured
- The Academic Title is replaced with the Medical Degree in countries where the Academic Title was migrated to the Medical Degree in the Veeva OpenData 20R2.0 release.



### Formatted name formula for countries

A change to any of the fields in the formula will automatically update the `formatted_name__v` field.

Fields Used in Formula	Country
<code>prefix__v + first_name__v + middle_name__v + last_name__v</code>	Belgium, Czech Republic, France, Ireland, Luxembourg, Monaco, Poland, Slovakia, United Kingdom
<code>prefix__v + first_name__v + last_name__v</code>	Andorra, Italy, Portugal, Spain
<code>first_name__v + middle_name__v + last_name__v</code>	Denmark, Finland, Norway, Sweden
<code>prefix__v + medical_degree_1__v + first_name__v + middle_name__v + last_name__v</code>	Austria, Bulgaria, Germany, Liechtenstein, Switzerland
<code>prefix__v + last_name__v + first_name__v + middle_name__v</code>	Hungary
<code>first_name__v + last_name__v</code>	Netherlands, Turkey

## Data maintenance

### DELETING CUSTOM OBJECT RECORDS

**21R1**

Administrators and data managers can soft-delete custom object records using a data maintenance job. When records are deleted, the associated sub-objects and relationship objects are also deleted or inactivated. The data maintenance job soft-deletes the records, so you can update downstream systems if records were previously exported before you hard delete them in Network. The data maintenance job deletes custom object records by object type.

This feature is enabled by default in your Network instance.

#### Delete behavior

When you delete custom object records, the following behavior occurs:

- Record state of the main object is set to DELETED.
- Record state of associated sub-objects and relationship objects are set to DELETED.

If the relationship object is owned by the other main object in the relationship, its record state is set to INVALID.

- All custom keys are inactivated.
- Pending tasks will be rejected and removed from the inbox.

Pending tasks on Merged\_Into records remain in the inbox until Data Stewards click the task.

Deleted objects cannot be reversed.



### *Supported custom object records*

All main custom object records can be deleted. Sub-objects and relationship object records cannot be deleted on their own.

#### **Exceptions**

Main objects cannot be deleted if the record state is MERGE\_INTRO or PARENT\_MERGED.

### *Create a data maintenance job*

To create a job to delete custom object records:

1. In the Admin console, click **System Interfaces > Data Maintenance Subscriptions**.
2. Click **Add Subscription**.
3. In the **Add Subscription** dialog, expand the list and choose **Delete Custom Object Records**.  
The subscription page displays.
4. In the **Details** section, provide the following:
  - **Name** - Type a meaningful name for the subscription.
  - **Action** - Identifies the job that you chose. This cannot be changed.
  - **Delete Records for Object** - Expand the list and select a custom object. All of the enabled custom objects in your Network instance display.  
The affected sub-objects and relationship objects display below the selected object.
  - **Description** - Provide a meaningful description.
  - **Status** - New subscriptions are **Enabled** by default. They can be disabled when they are no longer needed.
5. In the **Settings** section, select the job options for the subscription.
  - **Allow File Reprocessing** - Process the feed again, even if the files in the feed were previously processed. When this option is set, all files in the source folder will be loaded, regardless of whether or not they have previously been loaded. This setting is enabled by default.
  - **Job Error Log** - Export the error log for the source subscription to your FTP server.
6. In the **Record Deletion** section, choose the records that you want to delete for the custom object:
  - **Delete all records for the selected object** - All records for the custom object will be deleted.

If you choose this option, a table displays the objects that will be deleted by the subscription job. A count of the records that will be impacted and the update to the `record_state__v` field displays.





▼ **Record Deletion**

Delete all records for the selected object

OBJECT	RECORD COUNT	TO UPDATE RECORD_STATE__V
Market Basket (MARKETBASKET_V__C)	5	DELETED
Market Basket Content (MARKETBASKET_CONTENT_V_REL__C)	9	DELETED
Market Basket Content (MARKETBASKET_CONTENT_V_REL__C)	1	INVALID

Delete records from file

- **Delete records from file** - Specific records that are defined in a .csv file will be deleted.

When you select this option, create a .csv file that contains a one-column list of Network entity IDs (VIDs) that you want to delete. Network entity IDs and object type are validated during the delete job.

Store the file on your FTP server so it can be retrieved during the job.

In the fields, type the FTP path and .csv file name.

▼ **Record Deletion**

Delete all records for the selected object

Delete records from file

Enter the path and file name of a one column CSV file that contains the vid\_\_v of records to be soft-deleted

?

7. In the **Job Trigger Configuration** section, you can create a job or email trigger. For example, when the job complete, you could trigger a target subscription to update your downstream systems.
8. **Save** your data maintenance configuration.
9. Click **Start Job** to run the subscription.

### Job details

When the job completes, the **Job History** section is updated. Click the **ID** column to open the Job Details page.

The Job Details displays the counts of all main object, sub-object, and relationship object records that were deleted, invalidated, and inactivated (custom keys).



## Job Details (ID: 6) Cancel Job

---

**▼ Overview**

<b>Subscription</b> DeleteCustomRecords	<b>Action</b> Delete Custom Object Records
<b>Start Time</b> 2021-02-10 18:06:00 GMT	<b>Job ID</b> 6
<b>Duration</b> a few seconds	<b>Percent Complete</b> 100.00%
<b>Current Stage</b> FinalStage	<b>Outcome</b> COMPLETE
<b>Started By</b> PM Admin	

**▼ Data Load Summary**

ENTITY	ROWS READ FROM FILE	ROWS PARSED
MARKETBASKET_V__C	1	1

**▼ Entitles Updated Summary**

ENTITY	RECORDS DELETED	RECORDS INVALIDATED	RECORDS INACTIVATED
MARKETBASKET_V__C	0	0	0
CUSTOMKEY	0	0	2

### Change requests

When you delete objects, any pending tasks are automatically rejected and removed from the inbox and the My requests page.

### RESTRICTING ACCESS TO UNSUBSCRIBED HCPs FROM SEARCH AGAINST OPENDATA

20R3.1

Administrators can now prevent users from downloading HCPs that have been unsubscribed from OpenData. When records are unsubscribed, they are no longer available in your Network instance. However, if the Search against OpenData feature is enabled, the records display in the search results and include the **Download from OpenData** icon; users can unknowingly subscribe to HCPs again. You can now specify a reason when you unsubscribe HCPs and then those records can be filtered from OpenData search results based on that reason using data visibility profile permissions.

HCP records can be resubscribed in your local Network instance using search or if an incoming record from an add request matches a Veeva OpenData record. Records can also be resubscribed through other applications that integrate with Network using the API; for example, Veeva CRM (Network Account Search), Network search widget, and Veeva Concur Connector. Using this feature, users can be restricted from unsubscribed HCPs so they cannot be resubscribed through any of these ways.



## Enable this feature

This feature is not enabled by default. Administrators must enable the feature for your Network instance.

To enable the feature:

1. In the Admin console, click **Settings > General Settings**.
2. At the top of the page, click **Edit**.
3. Select the **Enable Option to Filter Unsubscribed HCPs from Search Against OpenData** setting.
4. In the pop-up window, confirm that you want to enable the feature.

**Important:** The feature cannot be disabled after it is enabled.

5. **Save** your changes.

Enabling the feature makes the following changes in your Network instance:

- **Data model updates** - A new data model field, `data_removal_reason__v`, is enabled. The field identifies the reason why the HCP is unsubscribed.
- **Data maintenance job** - A mandatory setting is added to the Unsubscribe from Veeva OpenData job configuration to identify the reason the HCPs are being unsubscribed.

**Note:** HCP records that have been unsubscribed to before this feature was available cannot be back-filled with a reason. These records cannot be filtered because they do not include the data removal reason.

- **Data visibility profiles (DVPs)** - DVPs include a new permission to restrict users from searching for and downloading HCP records from OpenData that were previously unsubscribed. The permissions are based on the reason an HCP was unsubscribed.

To learn more about these changes, see the sections below.

## Data model updates

### New field

When you enable the feature, a new reference type field, `data_removal_reason__v`, is automatically enabled in your Network instance. This field is a system field that is locally managed; change requests for this field are never sent to Veeva OpenData or third party data provider.

The field can only be updated using the Unsubscribe from OpenData Records data maintenance job. It cannot be disabled after it is enabled.

### New reference type

The new reference type, `DataRemovalReason`, is assigned to the `data_removal_reason__v` field. The reference codes are predefined and are used in the new data visibility setting and data maintenance job. The reference type is read-only and can only be extended by Veeva. It can be exported, but new codes cannot be added; the **Import** button is dimmed.



Reference Type Summary > DataRemovalReason Type DataRemovalReason

### Reference Codes – DataRemovalReason

Country: All countries Export Import

▼	NETWORK CODE ▲	NETWORK NAME	DEFINITION	CODE ACTIVE?	ACTIVE IN ALL COUNTRIES?
▼	DRR_01	HCP requested data removal	"Right to be forgotten" as defined by GDPR, CCPA etc.	✓	✓
▼	DRR_02	HCP is no longer targeted	Data storage period limitation (e.g. defined by GDPR), Company changes its therapeutic area	✓	✓
▼	DRR_03	HCP was added unintentionally	HCP added unintentionally to the working set, HCP downloaded unintentionally by sales rep or Network user	✓	✓
▼	DRR_04	HCP was removed for other reason	Any reason other than the ones listed above	✓	✓

Show 50 < 1 of 1 >

### Data visibility profiles setting

A new data visibility profile permission can prevent users from searching and downloading HCPs that have been unsubscribed from Veeva OpenData. The permission enables you to choose any of the predefined reasons for unsubscribing an HCP. HCPs that have been unsubscribed for those reasons will be filtered from search for all of the users assigned to the data visibility profile.

▼ Search

Can search OpenData Instance True ▼

Prevent search/download for HCPs unsubscribed from OpenData Instance

Can download/sync records from OpenData Instance True ▼

Can export from Search True ▼

Can Search Contract Organizations True ▼

The new permission does not display if this feature is not enabled in the Network instance.

This setting only applies to HCPs that have been unsubscribed from Veeva OpenData for the specified reasons.



## Set the permission

To filter access to unsubscribed HCPs for specific user types:

1. In the Admin console, click **Users & Permissions > Data Visibility Profiles**.
2. Open a data visibility profile.
3. In the **Search** section, expand the list beside **Prevent search/download for HCPs unsubscribed from OpenData Instance**.
  - **None** (default) - The user can search for and download any HCP that has been unsubscribed from OpenData.
  - **HCP requested data removal** - Use for data privacy. For example, the HCP has requested to be removed from your Network instance.
  - **HCP is no longer targeted** - Use for data storage period limitations, or if the HCP is no longer an active target.
  - **HCP was added unintentionally** - Use if the HCP was added by mistake through the OpenData subscription's working set or downloaded by a user.
  - **HCP was removed for other reasons** - Use for any reason other than the ones listed.

You can select multiple options; however, if **None** is selected, that can be the only option.

### Example

On a data visibility profile for sales reps, choose the **HCP requested data removal** reason to restrict those users from searching or downloading HCPs that were unsubscribed for data privacy compliance. This prevents sales reps from accidentally resubscribing the HCP without their consent.

Alternatively, on data visibility profiles for Data Manager users, do not choose this reason so Data Managers have access to search and download these HCPs in case the HCP provides consent to store and use their data again.

### *Updates to the unsubscribe data maintenance job*

The Unsubscribe from OpenData Records job now requires you to select the reason for unsubscribing HCPs. The **Reason for Unsubscribing HCPs** field value is applied to all of the HCP records in the job. The data visibility profile permission is then able to restrict users from searching and downloading the unsubscribed records that are flagged for that reason.

**Important:** The reason must apply to all of the HCPs that you have in your .csv file. If you are unsubscribing HCPs for other reasons, create a separate .csv file and create a different job for those records.

HCOs that are included in the file are not impacted; those records will be skipped when the reason is assigned to the record.



### unsubscribe\_job Details

Clone Start Job Cancel Save

▼ Details

**Name**

**Code** unsubscribe\_job\_\_c ?

**Action**  ▼  
 Unsubscribe from selected OpenData records.

- Sets the record state of HCOs and HCPs and all associated sub-objects to 'DELETED'
- Removes data from all custom fields
- Inactivates custom keys

**Reason for Unsubscribing HCPs**  ▼

This setting applies to all HCPs included in the uploaded file. On the Data visibility Profile you can prevent users from searching/downloading HCPs, if they were unsubscribed from OpenData for a specific reason.

The **Reason for Unsubscribing HCPs** setting displays only if this feature is enabled in your Network instance.

#### Reusing a configured unsubscribe job

If you reuse a previous unsubscribe job configuration for a new job, the configuration cannot be saved until you select the reason for unsubscribing HCPs.

#### Add requests for unsubscribed HCPs

The data visibility profile permission also prevents users from adding records that have been unsubscribed from OpenData.

If an add request matches with an HCP in OpenData that was unsubscribed for a specific reason, it will be automatically rejected if it was submitted by a user who does not have permission to search and download unsubscribed HCPs for that reason.

Users can view the resolution note to understand why the add request was rejected.



**My Requests > Add Request - Susana Morris**

### Add Request

<b>Add Request</b>	
First Name *	Susana
Last Name *	Morris
Primary Country	United Kingdom
HCP Type	Doctor
> ADDRESS (NEW)	
Country	United Kingdom
State/Province	No Value

**REQUEST SUMMARY**

**Task ID**  
937460446751034527

**Subject**  
New Record Request

**Creator**  
integration@verteo.vdmdev.com

**Source**  
Verteo

**Date Created**  
2020-10-22 15:34:19 IST

**Requester Comments**  
Test

**Assignee**

**Resolution Notes**  
(1) System Rejected - Unsubscribed record match is found. You do not have permissions to re-subscribe/download the record.  
(2) Request Approved

**Status**  
✔ Processed

### *Resubscribing to HCP records*

When users have permission to resubscribe to an HCP record from OpenData, the `data_removal_reason__v` field value is updated and set to No Value/Null.

### *Anonymizing unsubscribed records*

When unsubscribed HCP records are included in the Anonymize Deleted HCP records jobs, the `data_removal_reason__v` field value is retained; it is not masked or blanked during the anonymization job.

### *Reporting on data removal reason*

Unsubscribed records can be reported on; for example, a data manager can create an overview of all of the HCPs removed from their Network instance, including the data removal reason. The data removal reason can be accessed from reporting as long as the record has not been anonymized; anonymized records are removed from reporting.

### *Exporting data removal reasons*

You can export a list of all HCPs removed from your Network instance, including the data removal reason for each HCP. Anonymized HCPs are included in target subscriptions.

### *Network API*

This feature also supports the Network API. Unsubscribed HCPs are excluded from the Search API if a user's DVP prevents them from searching for the records. Similarly, the Retrieve API will prevent a user from downloading an unsubscribed record based on the user's DVP.



## More information

For detailed information about the data maintenance job, see [Unsubscribing from Veeva OpenData records](#) in the *Veeva Network Online Help*.

## Source rankings

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### NETWORK PORTAL SYSTEM

21R1

The Network Portal system, `network_portal__v`, can no longer be selected in the **Source Rankings**. The system does not apply to source rankings, so it has been removed from the list of available sources.

## Veeva OpenData subscriptions

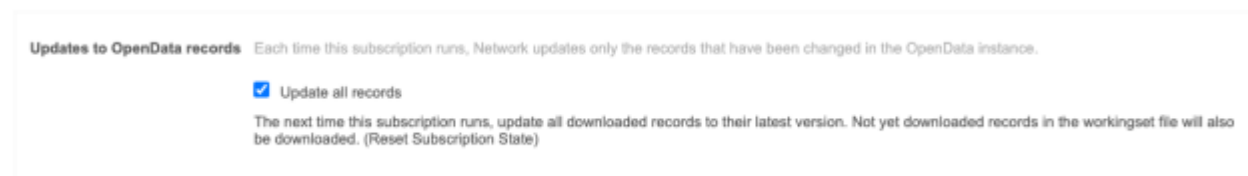
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### UPDATE ALL EXISTING OPENDATA RECORDS

21R1

Veeva OpenData country subscriptions now contain an option to update all of your records. Each time your subscription runs, only the records that have been changed in OpenData since the last time the subscription ran are included. This means that records in your working set will trickle into your Network instance as they are changed by OpenData, so some of them might not be downloaded to your Network instance. Using this new option, all of the records in your working set are forced to be downloaded and any records that you have already downloaded will be updated to their latest version.

This option is available in your OpenData country subscriptions. It is not enabled by default.



### Enable updates to all records

- In your OpenData country subscription (**System Interfaces > Veeva OpenData Subscriptions**), select the **Update all records** option.

The next time the subscription runs (manually, triggered, or on a schedule) it will look at the most recent full export from OpenData records for that country. Any entity IDs (VIDs) in the working set file that haven't already been downloaded will be downloaded. If any records in your Network instance have an older version number on a record, that record is updated to the version in the full export.

### Considerations for updates

If the version number for the record in your Network instance and the full export is the same, no updates occur even if the record in your Network instance doesn't have the latest data. For example, if you enable the email subscription for a country, emails will only be exported as OpenData makes changes to records.





To receive the updates when you subscribe to new data subscriptions, you can now request updates for specific records from Veeva OpenData. During the targeted job, all available updates for the record are pushed to your Network instance. To learn more about this feature, see the "Request targeted record updates" topic in these *Release Notes*.

## REQUEST TARGETED RECORD UPDATES

**21R1**

You can now request updates for specific HCP or HCO records from Veeva OpenData. This enables OpenData to ensure that you have the most current version of a record. It's also helpful when you subscribe to new record components. For example, if you subscribe to emails or enable an existing OpenData field, the data is only included in the OpenData delta export if the record has been changed by OpenData.

Using this feature, you can provide a list of entity IDs (VIDs) to the OpenData team. When your OpenData country subscription runs, the updates will be included in a separate export. The counts for records in the targeted export will be included in the subscription counts on the job page.

This feature is controlled by Veeva OpenData. To request updates for specific records, contact Veeva OpenData.

### *Request updates*

To specify the records that you need updated, create a .csv file for Veeva OpenData

#### **File requirements**

- The file must be a one-column list of entity IDs (VIDs)
- Records must already be downloaded in your Network instance. Entity IDs for records that are not yet downloaded will be ignored (even if they exist in your working set but haven't been downloaded yet).
- All records must apply to one country. Create a separate file for each country.
- The file cannot contain more than 50,000 rows.

When the file is complete, provide the list to Veeva OpenData.

### *Considerations for record updates*

- Records that have a record state that is DELETED will not be updated. This ensures that unsubscribed records are not resubscribed and downloaded to your Network instance again.
- If your file includes a merge loser, the merge winner will be included in the update for completeness. This is the only situation that a new record will be downloaded to your Network instance.
- Invalid records will be updated if they are included in the target file and updates exist.
- Updates could opt out a record if it has been opted out in OpenData.
- If you have applied a customer opt out on an OpenData record and the entity ID was in the targeted file, the opted out record will be updated.
- If no updates occur to a record, a revision will be noted on the record in the Revision History, but no changes will display.



### Targeted job

When your OpenData subscription runs, if there is a targeted update, it will be exported with a separate job ID. When the targeted update completes, the regular delta update runs with its own job ID.

After the job runs, the **Job History** displays the job ID and the counts of the targeted VIDs in the **Processed HCPs/HCOs** columns. Regular delta updates and targeted updates are both listed in Job History as CS\_IMPORT jobs and aren't distinguishable from each other.

ID	START TIME	DURATION	PROCESSED HCPs	PROCESSED HCOs	RUN TYPE	OUTCOME	JOB TRIGGERS?
22702	2021-03-09 16:46:56 GMT	a minute	47	21	CS_IMPORT	COMPLETE	Yes
22701	2021-03-09 16:46:33 GMT	a few seconds	10	6	CS_IMPORT	COMPLETE	No

On the Job Details page, the **Job Results Summary** section displays the record counts in the **Updated** or **Merged** column.

If the targeted update included records that have not yet been downloaded to your Network instance, those records are rejected. The **Overview** section displays a count for the **Number of Rejected Records**.

**Note:** This count is different from the **Rejected** column in the **Job Result Summary**. A count in the **Overview** section reflects records that do not exist in your Network instance. A count in the **Job Result Summary** reflects records that couldn't be updated by the job.

## Job Details (ID: 22701)

Cancel Job

### Overview

<b>System</b> cs_import	<b>Subscription</b> cs_import_v
<b>Start Time</b> 2021-03-09 16:46:33 GMT	<b>Job ID</b> 22701
<b>Duration</b> a few seconds	<b>Percent Complete</b> 100.00%
<b>Current Stage</b> FinalStage	<b>Outcome</b> COMPLETE
<b>Started By</b> Sara Roper	<b>Number of Bad Records</b> 0
<b>Number of Rejected Records</b> 2	

### Job Result Summary

ENTITY	TOTAL	ADDED	CANDIDATES ADDED	UPDATED	MERGED	INVALID
Health Care Organization	0	0	0	6	0	
Health Care Professional	1	0	0	10	0	
Address	0	0	0	3	0	
License	0	0	0	0	0	
Parent HCO	0	0	0	0	0	
Custom Key	1	0	0	21	0	



### Updates to Job Details for OpenData subscriptions

The Job Details page for all cs\_import subscriptions is updated to include only the **Job Result Summary** and **Job Trigger Summary** sections.

The following sections have been removed because they do not contain data for these OpenData subscription jobs.

- **Data Load Summary**
- **Processed Data Summary**
- **Match Summary**

### Report on the updated records

To identify the number of HCPs and HCOs that were updated by a job in your Network instance, you can run a report (**Reports > SQL Query Builder**).

Use the following query:

```
SELECT job.job_id, start_time, metric, counter, subscription, status
FROM job_stats, job
WHERE metric IN ('hcp.updated', 'hco.updated')
AND status = 'COMPLETE'
AND subscription = 'dfb_import_v' and (datediff
('day', start_time, CURRENT_DATE) < 7)
AND job.job_id = job_stats.job_id
ORDER BY job.job_id, metric ASC
```

### Example report

The screenshot shows the SQL Query Builder interface. At the top, there are tabs for 'Sample Queries' and 'My Recent Queries', and a 'Query Helper' section with 'Keywords', 'Operators', and 'Format Query' options. The main area contains a SQL query with line numbers 1 through 7. Below the query is a green checkmark icon and a checkbox labeled 'Include only VALID and UNDER\_REVIEW records in results.' with an information icon. The 'Report Results' section shows '2 records' and a 'View Full Screen' button. Below this are two tabs: 'Table' (selected) and 'Chart'. The table has six columns: JOB ID, START TIME, METRIC, VALUE, SUBSCRIPTION, and OUTCOME. It contains two rows of data for job ID 18051. At the bottom, it says 'Displaying 1 to 2 of 2' and 'Show 25' with a dropdown arrow, followed by '1 of 1' and navigation arrows.

JOB ID	START TIME	METRIC	VALUE	SUBSCRIPTION	OUTCOME
18051	2021-02-05 10:15:29	HCO Updated	0	dfb_import_v	COMPLETE
18051	2021-02-05 10:15:29	HCP Updated	3	dfb_import_v	COMPLETE



## GEO SUBDIVISION SUBSCRIPTIONS

21R1

The Geo Subdivision 2 subscription is now available for France and Monaco. The subscription contains sales data that is organized into small geographic areas.

If the subscription is added to your OpenData subscription for France or Monaco, the following fields are automatically enabled on the address object:

- geo\_subdivision\_2\_\_v
- geo\_subdivision\_2\_label\_\_v

For more information, see the [Geo Subdivision](#) topic in the Veeva Network Online Help.

## Match

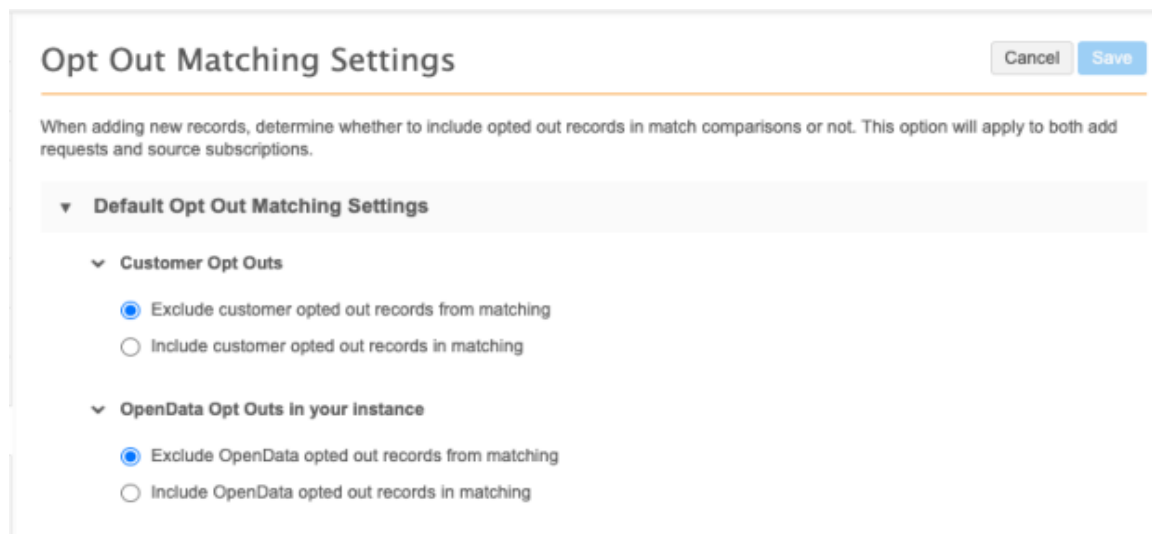
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### INCLUDE OPTED-OUT RECORDS IN MATCHING

21R1

Administrators can now choose to include opted-out HCP records in matching for incoming records from add requests and source subscriptions. By default, opted out records are excluded from matching.

This feature supports records that you have opted out in your Network instance (customer opt outs) and records that have been opted out from Veeva OpenData and have previously been downloaded to your Network instance. You can determine the opt out setting by country.



This feature is available by default in your Network instance.



## Enable this feature

Administrators can manage the match behavior for opted out records for their Network instance.

To configure match behavior:

1. In the Admin console, click **Settings > Opt Out Matching Settings**.

On the configuration page, the **Default Opt Out Matching Settings** section contains options for Customer and OpenData opt outs.

2. In the **Customer Opt Outs** section, choose an option:
  - **Exclude opted out records from matching** (default) - This is the default setting.
  - **Include opted out records in matching** - Allow records that you have opted out to be included in the matching process for add requests and source subscriptions.

These settings apply to all countries unless you add a country exception.

**Note:** If this section does not display, the `data_privacy_opt_out__c` field is not enabled or the Candidate Records feature is not enabled, or both. These must be enabled to match against customer opted-out records.

3. In the **OpenData Opt Outs** section, choose an option:
  - **Exclude opted out records from matching** - This is the default setting and represents the current behavior (no matching).
  - **Include opted out records in matching** - Allow opted-out records to be included in the matching process.

If you select this option, choose one of the following:

- **Review new incoming records that match OpenData opt outs** - Incoming records will be sent to the local inbox for review. If they are approved, they become valid and active locally managed records. Custom keys will be assigned to the records, as usual.

The record will include feedback that it initially matched with an opted out record.
- **Reject new incoming records that match OpenData opt outs** - Incoming records that match are rejected. On the rejected add request or source subscription job details, feedback displays so you know that the incoming record matched with an already downloaded OpenData opted out record.

These settings apply to all countries unless you add a country exception.

4. To define a different option for specific countries, click **Add Exception**.
5. **Save** your changes.

For more details about the match behavior, see the sections below.



### Match to customer opted out records

You can opt out any HCP record (local, Veeva OpenData, and third party mastered records) in your Network instance. Customer opted out records are visible in your Network instance depending on your data visibility profile permissions. Incoming records can be merged with customer opted out records if a match is found.

#### Match options

- **Exclude** - When you choose not to match with opted-out records, the present behavior for incoming unmatched records occurs (a valid record, a candidate record, or no record is created).  
Duplicate records could be created because the add request or source subscription cannot find the record that it should be matched to.
- **Include** - The match process will consider opted out records.
  - If a match is not found, the present behavior for incoming unmatched records occurs (a valid record, a candidate record, or no record is created).
  - If the incoming record matches, the outcome depends on the type of match that is found.

#### Summary of behavior for customer opt outs

	Match Option	Behavior
Add Requests	Exclude	Duplicate records could be created.
	Include	Add requests can become change requests or be created as candidate records and included in suspect match tasks.
Source subscriptions	Exclude	Duplicate records could be created.
	Include	Incoming records can match and update records or be created as candidate records and included in suspect match tasks.

### Matching to OpenData opted out records

When records that you have previously downloaded are opted out in Veeva OpenData, they can no longer be accessed in your Network instance. Using this feature, incoming records in add requests and source subscriptions can still match to the records because even though they're not visible, they're still there. Incoming records cannot be merged with opted-out OpenData records, but new locally managed records can be created.

#### Summary of behavior for OpenData opt outs

	Match Option	Behavior
Add Requests	Exclude	Customer cannot retain a copy of an opt out
	Include - Reject	Record matches and is automatically rejected with a note.
	Include - Review	Add request is sent to the local inbox with a note.
Source subscriptions	Exclude	Duplicate records could be created.
	Include - Reject	Record matches and is automatically rejected with a note.
	Include - Review	Add request is sent to the local inbox with a note.



## Match options

You can choose one of these options to match to OpenData opted out records:

- **Exclude** - When the matching process does not occur, the present behavior for incoming unmatched records occurs (a valid record, a candidate record, or no record is created).  
Duplicate records could be created because the add request or source subscription cannot find the record that it should be matched to.
- **Include** - The match process will consider opted-out records.

### Behavior for including opted out records

Match type	Outcome
No match is found	The present behavior for incoming unmatched records occurs (a valid record, a candidate record, or no record is created).
Key matches	If an incoming record matches using custom keys or entity IDs (VIDs), the opted out record is updated with the data from the incoming record (present behavior).
ACT and ASK matches	<p>When strong matches or fuzzy matches are found, Network recognizes that the match is with an opted out record and will not update it with the incoming record.</p> <p>The option that you choose in the configuration (<b>Reject</b> or <b>Review</b>) determines what happens to the incoming record.</p> <p><b>Reject</b> - If a match is found, the incoming record is auto-rejected and discarded.</p> <p><b>Review</b> - When a match is found, an add request is routed to the local inbox. If the add request is accepted, a locally managed record is created.</p>

### Rejecting and reviewing matches

#### Reject matches

If a match is found, the incoming record is auto-rejected and discarded.

**Note:** Because ASK and ACT matches are treated the same, some records might really be duplicates of opted out records, while other records are not. Rejecting records could result in the loss of data for records that are not actually a duplicate of the opted out record.



- **Add requests** - A resolution note displays in the request so the user knows why the request was rejected.

My Requests > Add Request - Darren Hanks

### Add Request

	Add Request	
First Name *	Darren	✓ ✕ ✎
Last Name *	Hanks	✓ ✕ ✎
HCP Type	Prescriber	✓ ✕ ✎
Status	Active	✓ ✕ ✎
AMA Do Not Contact?	No/False	✓ ✕ ✎
PDRP Opt Out?	No/False	✓ ✕ ✎
Associated with Kaiser?	No/False	✓ ✕ ✎
NPI	11110182	✓ ✕ ✎

▼ REQUEST SUMMARY

**Task ID**  
937925285403689023

**Subject**  
New Record Request

**Creator**  
system.admin.3.1@network.com

**Source**  
Entity Profile Editor

**Date Created**  
2021-01-12 11:48:54 EST

**Requester Comments**

**Assignee**

**Resolution Notes**  
System rejected - HCP has opted-out and cannot be updated. If this is an OpenData record, ask your Network administrator to contact the HCP to cancel his/her opt-out and email [privacy@veeva.com](mailto:privacy@veeva.com) with "Cancellation of opt-outs with the full HCP details" in the subject line. Otherwise, please create the HCP in your local instance.

**Status**  
✔ Processed

- **Source subscriptions** - A job warning displays in the **Job Error Log** so you can identify the record that was not processed.

▼ Job Error Log

EXTERNAL ID	STAGE	RULE	MESSAGE
0	Dry-Merge		An incoming record <TEST1:12185 TEST1:2> that was matched to the opted out master record <HCP:847328901477696512> was rejected as a configured action. <a href="#">less</a>

The entity ID displays, but opted-out OpenData records are not accessible in the Network UI. In this example, TEST1 : 12185 | TEST12 is the key for the record from the incoming file. TEST1 : 2 means that rejected record was in the second row of the feed called TEST1.

### Review matches

When a match is found, an add request is routed to the local inbox. If the add request is accepted, a locally managed record is created.

**Note:** An ASK match cannot be created as a suspect match task because the opted-out OpenData record is not visible in Network.

The resolution note explains that the record matched to an opted out record.





- **Add requests** - If the original add request was created by a Data Steward and it matches to an opted out record, the request is automatically approved, as usual. If it was created by another user, Data Stewards can review and process the request.

**Resolution Notes**  
System Info - Request is matched to an opted out record

---

**Status**  
🟡 Pending Review

- **Source subscriptions** - When an add request is created for the matched record, the Requester Comments in the add request explain that the record was matched in a source subscription.

▼ **REQUEST SUMMARY**

**Task ID**  
938232006405262495

---

**Subject**  
New Record Request

---

**Creator**  
Dataflow

---

**Source**  
Test system

---

**Date Created**  
2021-03-07 20:52:05 GMT

---

**Requester Comments**  
Suspect Match found in Dataflow Job 33423

---

**Assignee**  
sara.data.admin@verteo.com

---

**Resolution Notes**  
(1) System Info - Request is matched to an opted out record  
(2) System approved - Workflow settings, auto approval is enabled.

**Note:** Add requests will follow the rules you have defined in your workflow settings. For example, add requests from matched records will be automatically approved if you have set your workflow setting to do this for new customer owned records.



## Target subscriptions

### EXPORT ALL OBJECTS

21R1

Administrators and data managers can configure target subscriptions to automatically export all objects and fields. This ensures that any new objects and enabled fields are included in the export job; you do not have to update each target subscription configuration when new objects are added to your Network instance.

This enhancement supports the integration with Nitro's Veeva Network Intelligent Sync Connector to reduce configuration issues and implementation time. For information about this integration, see the [Nitro Online Help](#).

### Enable the setting

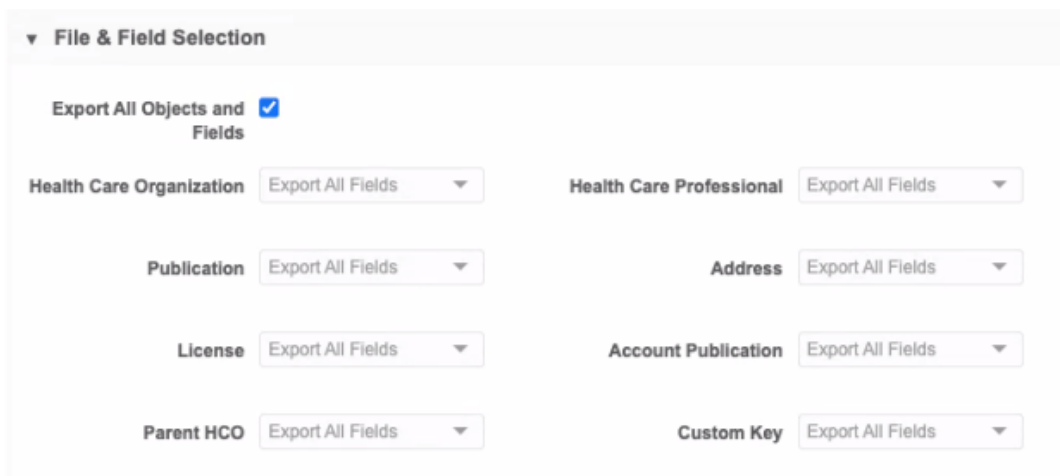
This new setting is not selected by default in your target subscription configurations.

To export all objects and field:

1. Open your target subscription (**System Interfaces > Target Subscriptions**).
2. In the **File & Field Selection** section, choose **Export All Objects and Fields**.

When the setting is selected, the options for each of the objects are dimmed and set to **Export All Fields**. This ensures that if an object is added to your Network instance, you do not need to update the target subscription; it is added to this section and will be set to **Export All Fields**.

If **Export All Objects and Fields** is not selected, new objects are added to this section and are set to **Do Not Export** by default.





### Export options

If you had previously defined export options for an object, those options are preserved. For example, if you have set the Health Care Organization Export Options to export records only when the primary country is the United States, that will not be changed. If no options had been previously defined, the object is set to **All Records**.

**Health Care Organization Export Options**

All Records  
 Select Records

Records exported will match at least ONE of the following condition groups.

FIELD	CONDITION	VALUE	
Primary Country	In	United States	x

+ Add Condition

Add Group

**Health Care Professional Export Options**

All Records  
 Select Records

3. **Save** your changes.

New custom objects added to your Network instance will be exported automatically when the subscription runs.

### DCR EXPORT

21R1

DCR exports can now include the master key of the parent HCO when a DCR with a relationship is exported. Previously, the exported file included only the Veeva ID of the parent HCO and the custom key of the object (HCP or HCO) that owned the relationship. Now, the custom key can be included so third party masters can easily identify the parent HCO and process the DCR.

This option is available in DCR export target subscriptions, but it is disabled by default. Administrators and data managers can enable it in the subscription configuration.

#### DCR export file

When the option to export the parent HCO custom key is enabled, three additional columns are appended to the end of the DCR export file:

- PARENT\_ENTITY\_CUSTOM\_KEY\_SOURCE
- PARENT\_ENTITY\_CUSTOM\_KEY\_TYPE
- PARENT\_ENTITY\_CUSTOM\_KEY\_VALUE



These new columns contain the active custom key of the related parent HCO object for the selected third party system. If there are no active custom keys on the parent HCO object, or if the ENTITY\_TYPE of the row is not "RELATION", these columns are empty.

**Export the parent HCO custom key**

To enable the option to include the parent HCO custom key:

1. Open a DCR export target subscription (**System Interfaces > Target Subscriptions**).
2. In the **General Export Options** section, click **Include Parent HCO Master Key**.
3. **Save** your changes.

**▼ General Export Options**

**TARGETED RECORD OPTIONS**

Full Data Extract  Full  Delta

DCR Status Pending Only ▼

Save Delta State

Include Parent HCO Master Key

The next time the subscription runs, the custom key will be included in the exported file.

DCR_BATCH_5616283002953						
IT_CREATOR	CREATOR_NOTE	RESOLUTION_NOTES	COUNTRY	PARENT_ENTITY_CUSTOM_KEY_SOURCE	PARENT_ENTITY_CUSTOM_KEY_TYPE	PARENT_ENTITY_CUSTOM_KEY_VALUE
admin@verteco.com			GB			
admin@verteco.com			GB			
admin@verteco.com			GB	tpm	HCO	887322909836248071
				tpm	HCO	887322909819470854

DCR exports are supported only for third party data providers. For more information, see [Exporting DCRs](#) in the *Veeva Network Online Help*.



## Users

### INTEGRATION USER

21R1

Administrators can now provide Integration Users with additional permissions for the target subscription and metadata API. This enhancement supports Nitro's Veeva Network Intelligent Sync Connector. For more information about this integration, see the [Nitro Online Help](#).

#### *Metadata permissions*

With the new permissions, Integration Users will have the following access:

- Visibility to all fields in the Metadata API regardless of their data visibility profile.  
Users can use the new ALL countries option in the metadata fields API with this permission. For more information, see the "API " section in these *Release Notes*.

The permission is not enabled by default.

#### *Enable the permission*

1. Open an Integration User's account (**Users & Permissions > Users**).
2. In the **Additional Permissions** section, select **Full Access** for the **Metadata Access** permission. By default, the permission is set to **Limited by Data Visibility Profile**.

▼ Additional Permissions

API Access	Allow All Systems
FTP Access	Allow
Metadata Access	Full Access

3. **Save** your changes.

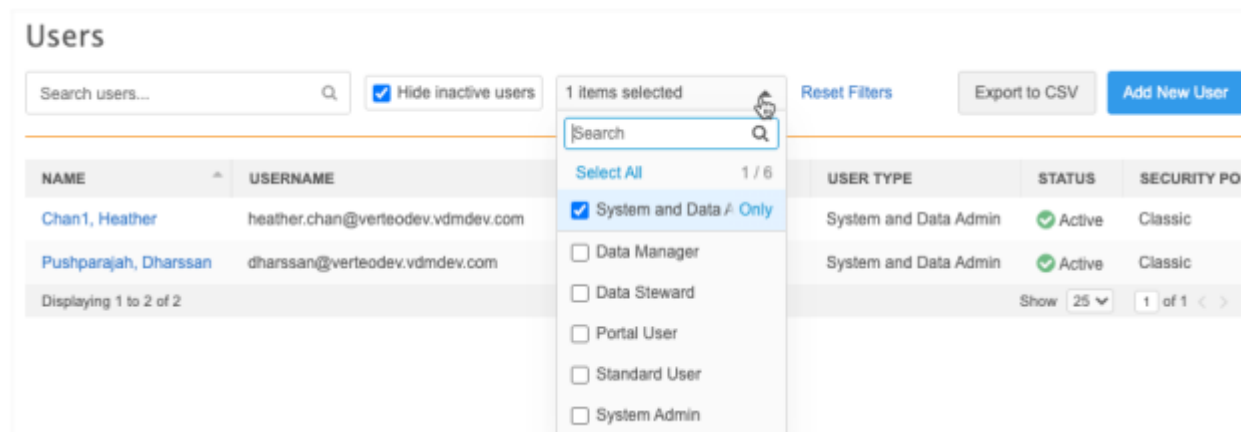
When the permission is assigned, an Integration User will have access to view and export all objects and fields to support Nitro Intelligent Sync.



## MANAGING USERS

20R3.1

Administrators can now quickly find user profiles by filtering the Users page by status or user type. Now, only active users display by default.



Performance improvements have been made to load users to list faster.

These enhancements are enabled in your Network instance by default.

## PORTAL USER

20R3.1

A new user type called Portal User enables you to create users that have access only to the Network Portal and Network Widgets. This user is also useful if your organization doesn't use single sign-on. Portal Users will access the Network Portal directly from the login page.

This user is available in your Network instance by default.

### Create a Portal User

To configure a Portal User:

1. On the Users page (**Users & Permissions > Users**), click **Add New User**.
2. In the **User type** list, select **Portal User**. The settings in the Primary Information section will update.
3. Type the **Username** - This field is required, but it will not be used by the Portal User. For other user types, this is the username that the user logs into the Network UI with.
4. Type the user's **Email** address. The welcome email for the Network Portal will be sent to this address.
5. In the **User type** list, select **Portal User**.
6. Define a **Portal Username** - This is the username for accessing the Network Portal only. The username must be unique. It cannot be the same as any other Network Username or Portal Username. This enables you to log into the Portal using a Portal Username or your Network Username if you have both.

**Tip:** For the best experience, use the user's corporate email address as their **Portal Username**.



▼ Primary Information

Status: Active

Username: emily.baines @verteo.veevanetwork.com

Email: emily.baines@verteo.com

User type: Portal User

Portal Username: ebaines@verteo.com

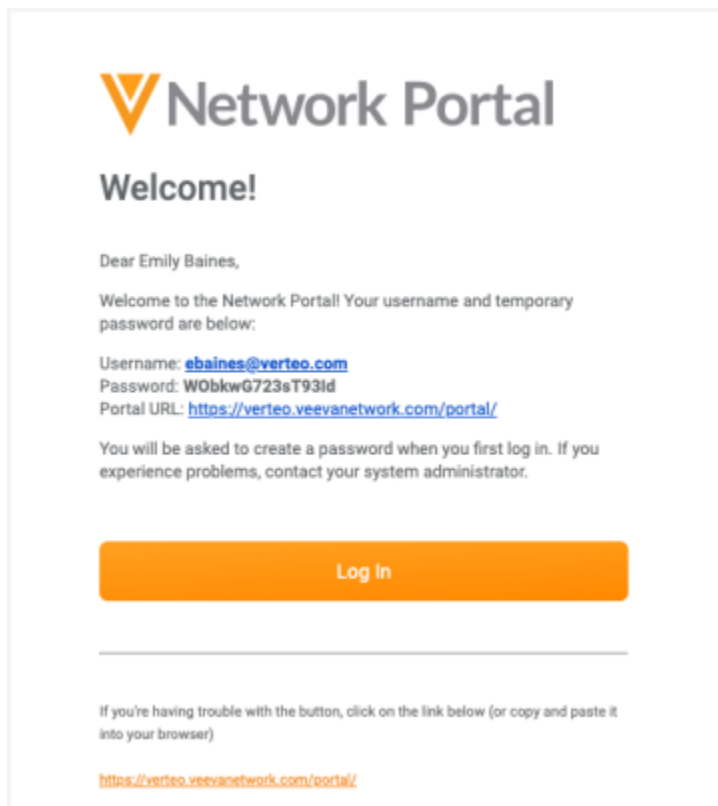
7. Complete the Contact Information section, as usual. The **First Name** and **Last Name** fields are mandatory.
8. In the Password section, the **Password the Generate temporary password and notify user** setting is selected by default. This ensures that the user receives an email with their username and temporary password. The email includes a link to their Network Portal.
9. Assign the appropriate **Data Visibility Profiles** to the user so they will have access to records in the Network Portal.
10. In the **User Groups** section, you can add the user to any custom user groups. The user will be assigned to several system managed user groups by default: **All Users, All Users except Integration Users, Portal Users, and SSO Users** (if the user is an SSO user) .
11. Accept the default **Settings** or make any required changes.
12. **Save** your changes.

**Note:** When you create a Portal User, the **Additional Permissions** section does not display because those permissions apply to the Network UI.



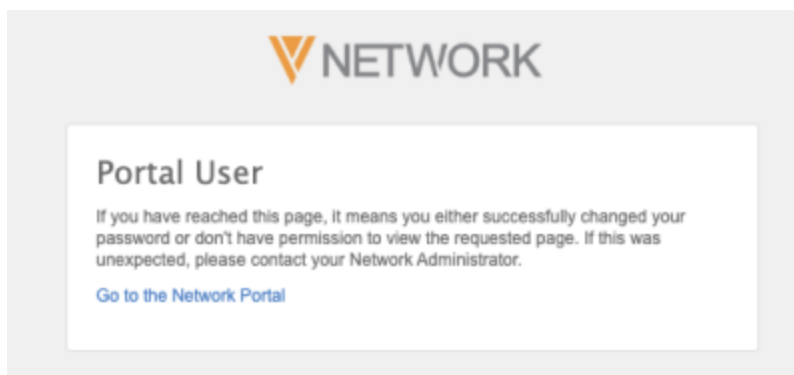
### Welcome email

Portal Users will receive a welcome email from Veeva Network that includes their (Portal) username and temporary password. Use the link in the email to navigate directly to the Network Portal .



### Access to the Network UI

Portal Users cannot access the Network UI. If a Portal User attempts to log into a Network instance, an error displays. Portal Users can click on the link to navigate to the Network Portal.







## SYSTEM MANAGED USER GROUPS

**20R3.1**

To help you easily manage and maintain user groups, Network now provides a number of system managed groups.

Custom user groups must be manually maintained, so managing them for larger Network instances with many users can be time-consuming. The system managed user groups are read-only; Network dynamically adds and removes users based on their user type, status (active or not active), and security policy. You can use the system managed user groups to easily assign permission to the Network Portal and its applications.

These system managed user groups are enabled in your Network instance by default.

### *New user groups*

Several new predefined user groups have been added to your Network instance. They are managed by Veeva and they are read-only.

User Group Name	Description	User Types and Criteria
<b>All Users</b>	All active Network users.	All of the following active user types: System Admins, Data Managers, Data Stewards, Standard Users, System and Data Admins, Portal Users, Integration Users.
<b>All Users Except Integration Users</b>	All active Network users except Integration Users.	All of the following active user types: System Admins, Data Managers, Data Stewards, Standard Users, System and Data Admins, Portal Users.
<b>Data Managers</b>	All active Data Manager users.	All active users with the Data Manager user type.
<b>Data Stewards</b>	All active Data Steward users.	All active users with the Data Steward user type.
<b>Portal Users</b>	All active Portal Users.	All active users with the Portal user type.
<b>SSO Users</b>	All active users with single sign-on (SSO).	All users with SSO security policy. Any user that logs in using single sign-on is automatically added to this group.  The security policy in the Security Settings must be <b>Single Sign-on with SAML</b> .
<b>Standard Users</b>	All active Standard users.	All active users with the Standard user type.
<b>System Admins</b>	All active System Admin users.	All active users with the System Admin user type.
<b>System and Data Admin</b>	All active System and Data Admin users.	All active users with the System and Data Admin user type.

These groups can be used for dynamic access control, field restrictions, and the Network Portal.



### *Add users to system managed groups*

Network automatically adds users to system managed groups based on their user type, status (active only) and security policy. If your user type changes, you are removed from the previous group and added to the group for your new user type. If the status of a user is no longer active, the user is removed from all system managed user groups. These changes are dynamic.

### *View user group details*

To view more information and see a list of users included in the user group, select the group on the Users Group page. All system managed groups are read-only.

**System and Data Admins (Read Only)**

**Details**

- Name:** System and Data Admins
- Description:** All active users with the system and data admin user type.
- Type:** System Managed Group
- Status:** Active

**Users**

Search selected users ...

NAME	USERNAME	USER TYPE	STATUS	SECURITY POLICY	PROFILE	INBOX TASK GROUPS
Burn, Linda	linda.burn@verteo.vdmdev.com	System and Data Admin	Active	Classic	US Data	<a href="#">Data Loading Jobs</a>
Chan, Heather	heather.chan@verteo.vdmdev.com	System and Data Admin	Active	Classic	US Data	<a href="#">Data Loading Jobs, Data</a>
Pushparajah, Dharsan	dharsan@verteo.vdmdev.com	System and Data Admin	Active	Classic	US Data	<a href="#">Data Loading Jobs</a>

Displaying 1 to 3 of 3

Show 25 1 of 1

## USER GROUP IMPROVEMENTS

**20R3.1**

Enhancements have been made to custom user groups so you can easily add and remove users in bulk. Usability enhancements have been made to user groups on the User Groups page, the Dynamic Access Control feature, and the Field Restrictions feature to help you find and select groups.

These enhancements are enabled in your Network instance by default.

### *Custom user groups*

Updates have been made to custom user groups to make it easier to add and remove users in bulk.

#### **Add users**

To add users, select the group from the User Groups page and click **Add Users**.



The **Add Users** pop-up is redesigned and includes filters so you can sort the list by user type, status, and data visibility profile. You can also use the search box to find specific users. The users that are not already included in the user group display in the list. Only active users display by default.

The count of users displays; for example, **14 results**. The count updates if you filter or search for specific users.

<input type="checkbox"/>	USER	USER TYPE	STATUS	PROFILE	INBOX TASK GROUPS
<input type="checkbox"/>	<b>Hakobyan, Irina</b> irina.hakobyan@verteo.com	System Admin	✓ Active	US Data	Data Loading Jobs
<input type="checkbox"/>	<b>Milicevic, Miki</b> miki.milicevic@verteo.com	System Admin	✓ Active	US Data	Data Loading Jobs
<input type="checkbox"/>	<b>Milicevic, Miki</b> Miki.Milicevic1@verteo.com	Standard User	✓ Active	US Data	
<input type="checkbox"/>	<b>Pushparajah, Dharssan</b> dharssan.portal@verteo.com	Portal User	✓ Active	US Data	
<input type="checkbox"/>	<b>Burn, Linda</b> linda.burn@verteo.com	System and Data Admin	✓ Active	US Data	Data Loading Jobs
<input type="checkbox"/>	<b>Pushparajah, Dharssan</b> dharssan.app4@verteo.com	Portal User	✓ Active	US Data	

- **Add users individually** - Select the checkbox beside the user name.
- **Add users in bulk** - Select the checkbox beside **User**. This selects all of the users that currently display.

**Tip:** To add most, but not all users, click the checkbox beside **User** to select all of the users and then clear the checkbox beside any user names that should not be added.

The count of selected users displays in the **Add Users** button; for example, **Add 3 Users**. The users will be added to the group when you save your changes.



### Example

You can search for users assigned to the Data Loading Jobs inbox task group. Click the checkbox beside **User** to select all of the users that match your search and add them to the group.

**Add Users** ✕

Search for, and select users to add to the user group.

✕
  Hide inactive users
  ▼
  ▼
 [Reset Filters](#)
3 Results

<input checked="" type="checkbox"/>	USER	USER TYPE	STATUS	PROFILE	INBOX TASK GROUPS
<input checked="" type="checkbox"/>	<b>Hakobyan, Irina</b> irina.hakobyan@verteo.com	System Admin	✓ Active	US Data	Data Loading Jobs
<input checked="" type="checkbox"/>	<b>Milicevic, Miki</b> miki.milicevic@verteo.com	System Admin	✓ Active	US Data	Data Loading Jobs
<input checked="" type="checkbox"/>	<b>Burn, Linda</b> linda.burn@verteo.com	System and Data Admin	✓ Active	US Data	Data Loading Jobs

### Remove users

Users are removed directly from the user group configuration page.

- **Remove individual users** - Select the checkbox beside the user name and click **Remove Users**.
- **Remove multiple users** - Select the checkbox beside **Name**. All users will be selected. Clear the checkbox beside any users that you want to remain in the group and click **Remove Users**. The users are immediately removed from the table. The users will be removed from the group when you save the User Groups page.

**Users**

Search selected users ...

	NAME	USERNAME	USER TYPE	STATUS	SECURITY POLICY	PROFILE
<input type="checkbox"/>	Admin, NetOps	netops.admin@verteo.com	System Admin	✓ Active	Classic	EU - DE Data, EU - f
<input type="checkbox"/>	Pushparajah2, Dharssan	dharssan2@verteo.com	System Admin	✓ Active	Classic	US Data
<input checked="" type="checkbox"/>	Pingitore, Fernando	fernando.pingitore@verteo.com	System Admin	✓ Active	Classic	EU - DE Data, EU - f
<input checked="" type="checkbox"/>	Chan, Heather	heather.chan@verteo.com	System and Data Admin	✓ Active	Classic	US Data
<input type="checkbox"/>	Chan, Heather	Heather.Chan1@verteo.com	Standard User	✓ Active	SSO	US Data



### User details page

User groups are listed on each user's User page. The table displays the system managed groups that the user is automatically assigned to, based on their user type. It also displays any custom groups that the user has been manually added to. A count of the active users in each group also displays in the table.

▼ User Groups

Users will automatically be added to the applicable system managed groups when this page is saved. Remove User Groups Add User Groups

<input type="checkbox"/>	GROUP NAME	DESCRIPTION	TYPE	ACTIVE USERS	STATUS
<input checked="" type="checkbox"/>	All Users	All active users with the following user types: System Admin, System and Data... <a href="#">more</a>	System Managed Group	53	Active
<input checked="" type="checkbox"/>	All Users Except Integration Users	All active users with the following user types: System Admin, System and Data... <a href="#">more</a>	System Managed Group	51	Active
<input checked="" type="checkbox"/>	Data Stewards	All active users with the data steward user type.	System Managed Group	7	Active
<input checked="" type="checkbox"/>	SSO Users	All active Single Sign-on (SSO) users. An SSO user is a user assigned to a SA ... <a href="#">more</a>	System Managed Group	6	Active
<input type="checkbox"/>	US data stewards	User group for data stewards in the US only	Custom Group	20	Active

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### Remove user from a custom group

To remove the user from a custom group, click the checkbox beside the custom user group name and click **Remove User Groups**. The group is immediately removed from the table. The user will be removed from the group when you save the user page.

### Add user to custom groups

You can add a user to a user group directly from the user detail page. Click **Add User Groups**. The pop-up displays any custom groups that the user is not already assigned to.

To add the user to multiple groups, click the checkbox beside **Group Name** to select all of the groups.

**Add User Groups** ✕

Search for, and select user groups to add this user to.

Hide inactive user groups
 [Reset Filters](#)
2 Results

<input type="checkbox"/>	GROUP NAME	DESCRIPTION	ACTIVE USERS	STATUS
<input type="checkbox"/>	US Sales Reps	Sales reps in the United States.	20	Active
<input type="checkbox"/>	Employee Object	Users with access to the Employee custom object.	8	Active












Cancel Add User Groups



### User Groups page

The User Groups page is updated to include the **Type** column and the **Active Users** column so you can see a count of active users in each system managed and custom user group. If there are no users for a specific user type, the user group still displays on the User Groups page.

The system managed groups also include the Veeva icon beside the group name so you can quickly identify the system managed groups.

GROUP NAME	DESCRIPTION	TYPE	ACTIVE USERS	STATUS
 All Users	All active users with the following user types: System Admin, Sys... <a href="#">more</a>	System Managed Group	32	Active
 All Users Except Integration Users	All active users with the following user types: System Admin, Sys... <a href="#">more</a>	System Managed Group	31	Active
 Data Managers	All active users with the data manager user type.	System Managed Group	3	Active
 Data Stewards	All active users with the data steward user type.	System Managed Group	4	Active
 Integration Users	All active users with the integration user type.	System Managed Group	1	Active
 Portal Users	All active users with the Portal user type.	System Managed Group	6	Active
 SSO Users	All active Single Sign-on (SSO) users. An SSO user is a user assi... <a href="#">more</a>	System Managed Group	4	Active
 Standard Users	All active users with the standard user type.	System Managed Group	7	Active
 System Admins	All active users with the system admin user type.	System Managed Group	8	Active
 System and Data Admins	All active users with the system and data admin user type.	System Managed Group	3	Active
 US data stewards	User groups for data stewards in the US only.	Custom Group	21	Active

### Dynamic access control

You can add custom and system managed user groups in bulk to your dynamic access control rules. Use the search field to find a specific group.

- **Add user groups individually** - Select the checkbox beside the user group name.
- **Add user groups in bulk** - Select the checkbox beside **Group Name**. This selects all of the user groups that currently display.



**Add User Groups**

Search for, and select user groups to add to the rule.

Search user groups...  Hide inactive user groups [Reset Filters](#) 10 Results

<input type="checkbox"/>	GROUP NAME	DESCRIPTION	TYPE	ACTIVE USERS	STATUS
<input type="checkbox"/>	▼ All Users	All active users with the following user types: System Admin, System ... <a href="#">more</a>	System Managed Group	19	Active
<input type="checkbox"/>	▼ All Users Except Integration Users	All active users with the following user types: System Admin, System ... <a href="#">more</a>	System Managed Group	19	Active
<input type="checkbox"/>	▼ Data Managers	All active users with the data manager user type.	System Managed Group	2	Active
<input checked="" type="checkbox"/>	▼ Data Stewards	All active users with the data steward user type.	System Managed Group	3	Active
<input type="checkbox"/>	▼ Integration Users	All active users with the integration user type.	System Managed Group	0	Active
<input type="checkbox"/>	▼ Portal Users	All active users with the Portal user type.	System Managed Group	6	Active

### Field restrictions

The system managed user groups can be added to your field restriction permissions. When you expand the user group list, the system managed groups can be easily identified by the Veeva icon beside the group name.

▼ **Field Restriction Permissions**

Define the users and user groups that can access the field.  
**Note:** Field Restrictions do not apply to the DCR page.

▼ **User groups**

Search user groups...

GROUP NAME	PERMISSION
Select a user group	Read-only
<input type="text" value="Search"/>	
▼ All Users (19 Users)	
▼ All Users Except Integration Users (1...)	
▼ System Admins (3 Users)	
▼ Data Managers (2 Users)	
▼ Data Stewards (3 Users)	
▼ Standard Users (3 Users)	
▼ Portal Users (6 Users)	
▼ System and Data Admins (2 Users)	
▼ SSO Users (1 Users)	
▼ Integration Users (0 Users)	

**PERMISSION**

No users selected [Add User](#)



## Audit

All changes made to custom user groups are tracked in the System Audit Log.

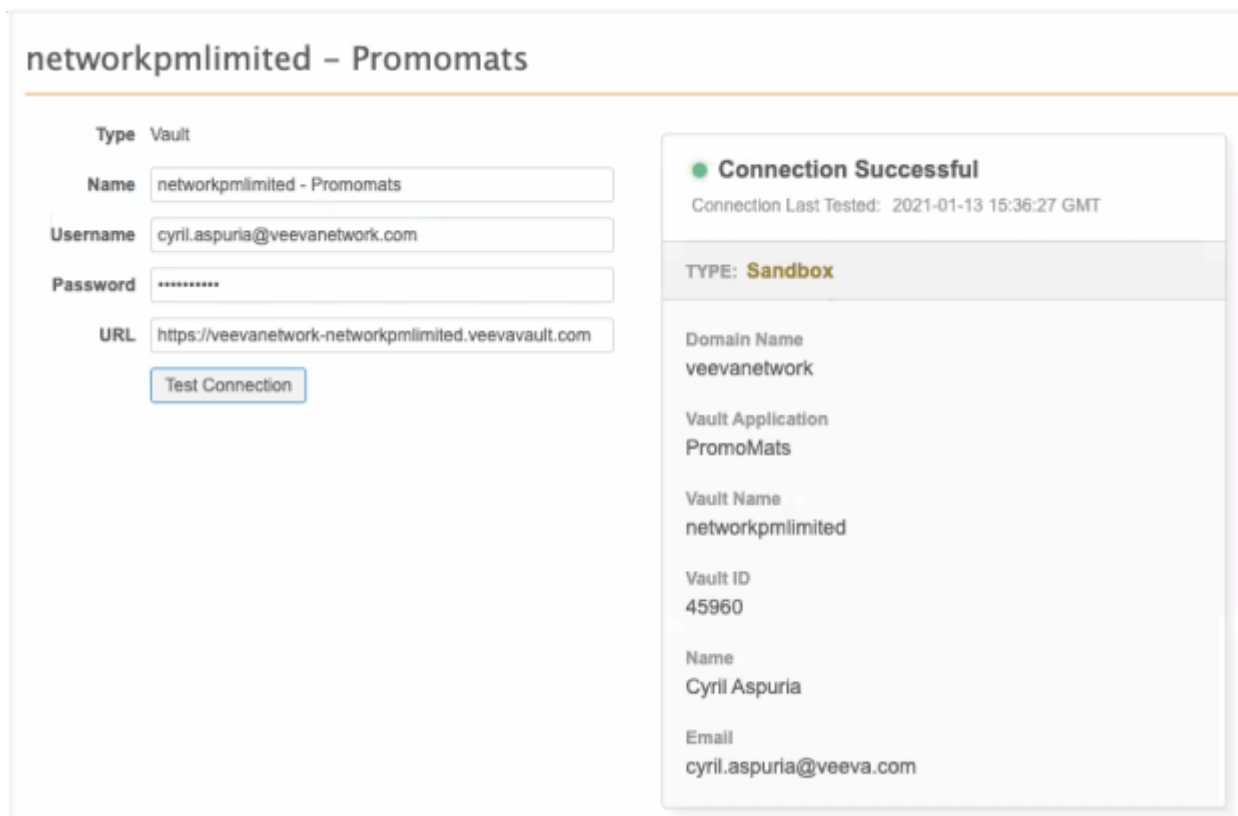
## Admin settings

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### EXTERNAL CREDENTIALS IMPROVEMENTS

20R3.1

The External Credentials feature is enhanced to provide more information about the environment that the external credential is linked to. It also provides warnings if you are potentially connecting to the wrong environment; for example, if the credentials connect your Sandbox Network instance to a Production CRM org.



This enhancement is enabled by default in your Network instance.

### Testing credentials

Credentials can be stored for several integrations (**Settings > External Credentials**).

The enhanced details are supported for the following credential types:

- Salesforce - Details include the Salesforce organization and Integration User.
- CRM - Org ID - Details include the CRM org and Integration User.
- Vault - Details include the Vault instance and Integration User.

When you add a credential and click **Test Connection**, additional details display in a panel.

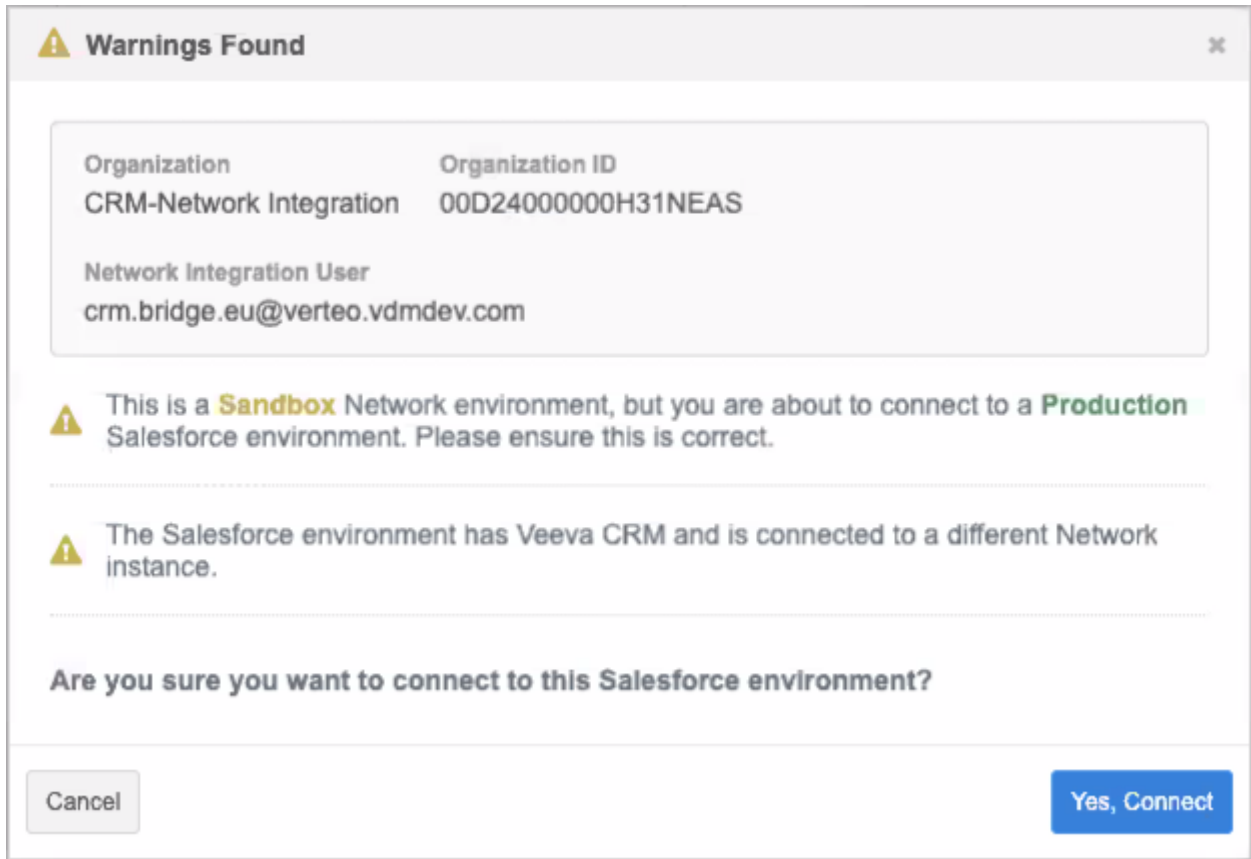




### Example - Warnings

In this example, there are two warnings:

- The credential is connecting to a Sandbox environment from a Production environment.
- The credential is potentially connecting to a Salesforce environment that has a different Network instance through the Network Bridge.



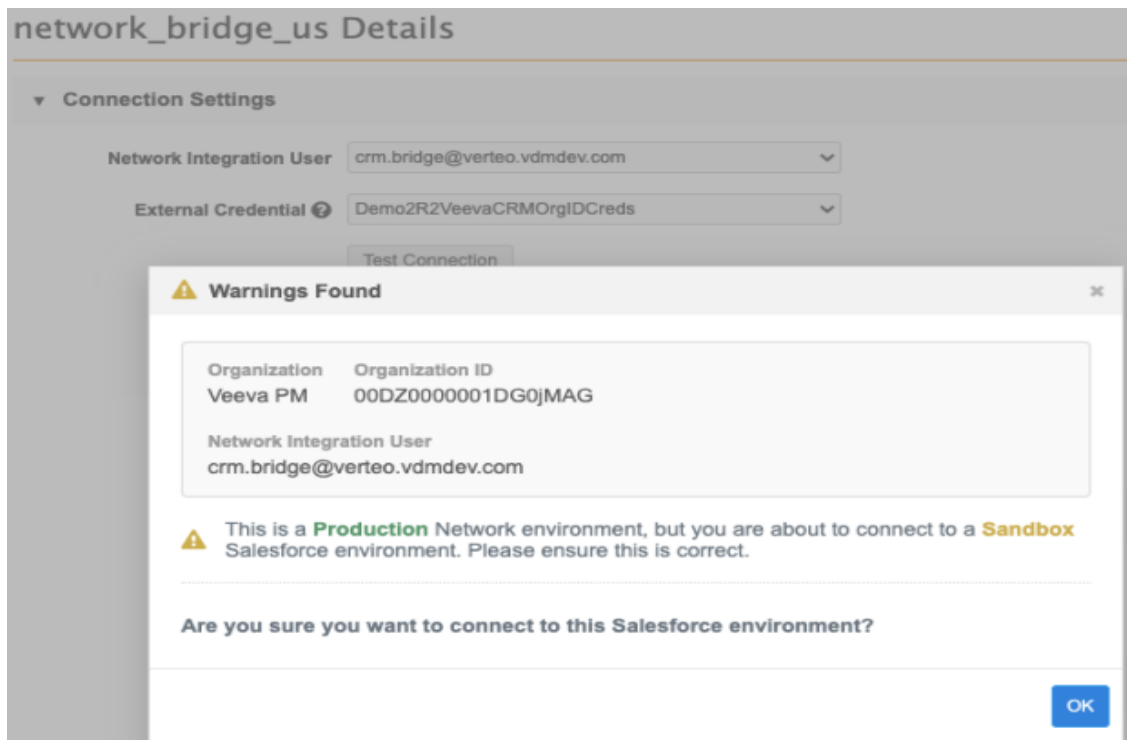
You can cancel the connection and correct the credentials or you can choose to connect to the environment

### Integrations

This behavior also occurs on the Network Bridge and Veeva Connector configurations when you click **Test Connection**.



### Example - Network Bridge



Click **OK** to connect or click the **x** icon to close the dialog and update the credential.

### External Credentials list

On the External Credential page, you can see if the credential is linked to a Production or Sandbox Environment. For some credentials, the **Environment** column is blank because it does not apply to the credential: for example, Nitro FTP credentials.

CREENTIAL NAME ^	USERNAME	URL	TYPE	ENVIRONMENT
networkclinical	cyril.aspuria@veevanetwork.com	https://veevanetwork-clinical.veevavault.com	Vault	Sandbox
networkpmlimited - Pro...	cyril.aspuria@veevanetwork.com	https://veevanetwork-networkpmlimited.veevavault...	Vault	Sandbox
NitroAPI	ftp_network_ftp_prod__v	https://cdw-02-app-us.veevanitro.com	Nitro API	Not Available
NitroFTP	ftp_network_ftp_prod__v	cdw-02-sftp-us.veevanitro.com	Nitro FTP	Not Available
ProdCRMOrg	cyril@crm-network.integration	https://login.salesforce.com	Salesforce	Production
veeva.pm.network	cyril@veeva.pm.network	https://test.salesforce.com	Salesforce	Sandbox
veeva.pm.network-org	00DZ000001DG0JMAG		Veeva CRM - Org ID	Sandbox

For existing credentials, this information will display after you save a credential.

### Audit

Updates to external credentials are tracked in the System Audit Log.

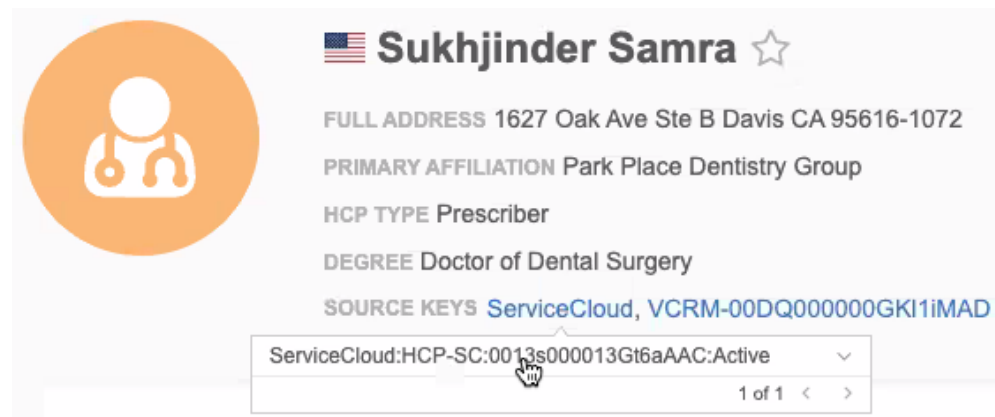


## Network Integrations

### CRM UPSERT CONNECTOR

**21R1**

Custom keys can now be generated when new records are created in Salesforce™ using the CRM Upsert Connector. Previously, the keys of Salesforce records were not stored in Network so it was difficult to track the records in Salesforce. Also, if you used the Export by VID feature with custom key filters for the target subscription, the newly created records were not regularly updated because there was no custom key. Now, the key can be stored when records are created, just as it is stored when records are created through the Network Bridge and Network widgets.



This enhancement is available by default in your Network instance.

#### Create custom keys

The object mapping in CRM Upsert Connector (**System Interfaces > Veeva Connector**) configurations contains the option to generate custom keys.

To enable the option:

1. In the **Upsert Settings** section, select **Generate Custom Keys for Newly Added Records** for each object configuration.

Custom keys are not generated for sub-objects or relationship objects.

2. Define the following key values:
  - **Custom Key Source** - The source; for example, `ServiceCloud`.
  - **Custom Key Item Type** - The object; for example, `HCP`.
  - **Veeva ID File Column Header** - The **File Column Header** field name that contains the Network Entity ID (VID). For example, `vid__v`.



**Generate Custom Keys for Newly Added Records**

**⚠ Custom Keys cannot be generated for sub-objects (e.g. Address) or relationship objects (e.g. Parent HCO).**

**Custom Key Source**

**Custom Key Item Type**

**Veeva ID File Column Header**

3. **Save** your changes. The next time the upsert job runs, custom keys will be generated for that object in Network when new records are created in Salesforce.

### Upsert logs

After the job completes, the Job Details contains a new log file that includes information about the objects where custom keys were successfully created, or failed.

The log file name has the following format:

```
customkey_job_<job_ID>_<object_name>.csv
```

**Upsert Logs**

FTP PATH	Download File
/logs/veeva_connector__v/ServiceCloudWidgetConnector/success_job_2351_account.csv	Download File
/logs/veeva_connector__v/ServiceCloudWidgetConnector/error_job_2351_account.csv	Download File
/logs/veeva_connector__v/ServiceCloudWidgetConnector/customKey_job_2351_account.csv	Download File
/logs/veeva_connector__v/ServiceCloudWidgetConnector/success_job_2351_Address_vod__c.csv	Download File
/logs/veeva_connector__v/ServiceCloudWidgetConnector/error_job_2351_Address_vod__c.csv	Download File

Download the log file to view the details. The log includes the Salesforce ID and the new custom key that was created.



## NETWORK BRIDGE

20R3.1

Addresses with the record state, `Merged_Into`, that were associated to DEA licenses are now deleted in Veeva CRM. Previously, addresses associated to DEA licenses were not deleted.

### *Enable Merged\_Into address deletion*

The CRM setting, `NETWORK_ADDRESS_DELETION_PROCESS_vod__c`, must be set to is set to 1 or 2.

When `NETWORK_ADDRESS_DELETION_PROCESS_vod__c` is set to 2, the last address or primary address on the account is not deleted.

For more information, see [Handling Inactive Network Records](#) in the *Veeva CRM Online Help*.

## API

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### VERSION UPDATE

21R1

The Network API is updated to v23.0.

As with all version updates, integration users should continue to use v22.0 until there is a change for v23.0 that they want to apply.

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

### METADATA API

21R1

To support Nitro's Veeva Network Intelligent Sync Connector, a new value is available for the `countries` parameter. The `ALL` value enables Integration Users to retrieve metadata access to all enabled fields for all countries. For example, if an Integration User has access to US data only, using this option allows them metadata access to all fields for all countries.

This option is supported in v23.0 of the Network API.

Value	Required?	Description
ALL	False	All fields are included in the response regardless of the countries that the Integration User has access to through their data visibility profile.

### *Sample request*

```
GET
{{URL}}/api/v23.0/metadata/fields?objectTypes=HCP&details=full&countries=ALL
```



**Note:** The Integration User's user account must have the **Metadata Access** permission set to **Full Access**. If the setting is not enabled, the user will see an error when they use the ALL option for the `country` parameter. For more information, see the "Users" section in these *Release Notes*.

For information about Nitro's Veeva Network Intelligent Sync Connector, see the [Nitro Online Help](#).