

Veeva Network

Veeva Network 23R1.1.1 Release Notes

June 2023



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About these Release Notes

These Release Notes describe all features that are included in Veeva Network 23R1.1.

SUBSCRIBE TO RELEASE NOTIFICATIONS

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

Software releases and maintenance

• Veeva Trust Site

At the top of the page, click **Subscribe to Veeva Trust Site** and subscribe to the Veeva Network component.

Release Notes and Data Governance documents

The documents are posted in the following locations:

• Veeva Connect - Join the Network Community.

To be notified as soon as the Release Notes are posted, go to your Veeva Connect profile and click **Settings**. On the Email Frequency page, expand the list and choose **Immediate**. Other notification options are **Daily** and **Weekly**.

• Veeva Product Support Portal

Follow the Network Release Notes section to be notified when release documents are posted.

For more information, see About Network Releases in the Veeva Network Online Help.

Browser requirements

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

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

Veeva Network is not supported on mobile devices.



Release Note updates

Changes have been made to the following enhancement since the Sandbox Release Notes were published:

• **Password management** – Administrators can now unlock user accounts and reset passwords for individual users.

Note: The ability for users to unlock their own accounts will not be available in Network version 23R1.1.

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

• **Inactivating fields** – Before a field is inactivated, the confirmation dialog displays any impacted Network hashtags that will also be inactivated because the field is used in the hashtag rule.

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

What's new

The following key enhancements comprise the Veeva Network 23R1.1 minor release.

		ST	DS	DM	AD
Network widgets					
Hierarchy Explorer widget	Ancestors and rollup counts on the Summary View are now clickable so you can easily move through the hierarchy and explore the data.	•	•	•	•
Profiles					
Relationship owner	Affiliation badges display on relationships to identify if the relationship is locally managed, owned by OpenData, or owned by a third party provider.	•	•	•	•
Send to OpenData	Add requests that are sent to OpenData contain the default message, OpenData Takeover Request, in the Requester Notes.		•	•	
Data model					
Inactivating fields	Before fields are inactivated, the confirmation dialog displays any impacted Network hashtags that will also be inactivated.			•	•
Users					
Password management	Administrators can now unlock user accounts and reset passwords for individual users.				•
Integrations					
Hashtags in Veeva CRM	Network hashtags can be stored in an alternate field in CRM if the Account Identifier is already in use.			•	•



		ST	DS	DM	AD
API					
Custom fields on OpenData search results	Custom fields that contain default or calculated values can now display in the Search API for OpenData search results.	Admi	n and [Develop	ers
Match API	Reference value labels and reference aliases are now supported in Match API results.		Develo	opers	

Note: The System and Data Admin user has all 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.



SUMMARY VIEW

All of the ancestors and rollup counts on the Summary View are now clickable so you can easily move through the hierarchy and explore the data. The rollup counts open a popup to display a detailed view of the HCOs or HCPs in that grouping.

These enhancements are enabled by default in your Network instance.

Summary view focus

The Summary View can focus on any HCO in your hierarchy. Click an ancestor HCO to quickly change the focus of the view to that HCO. This enables you to quickly move up and down the hierarchy and view the rollup counts on different HCOs.

Example

On the Summary View for Alamance Regional Medical Center, click the Cardinal Health Inc Corporate Office ancestor (HCO).



The Summary View updates to focus on Cardinal Heath so you can see the HCO and HCP rollup counts for that HCO.



ctive Filters						
	Level 1 867 合 HCOs 49 本 HCPs	Level 2 8311 ① HCOs 331273 & HCPs	Level 3 3992 ① HCOs 24665 & HCPs	Level 4 25 ① HCOs 6669 & HCPs	Level 5 1 1 HCOs 243 & HCPs	Leve 0 (1) 9 (4)
Cardinal Health Inc Corporate Office 13196 (b) Total HCOs 852 (b) Hospital 17 (b) Admin Ordy Location 4100 V2 PHS 3428 2837 V2 Group Practice 150 # Pharmacy 65 (b) Induson Center 2467 (f), Hospital Department 35 # Industan 2649 (Loberatory 8 (c) Group Practice 267 (c) Construct Agency 8 (c) Group Practice 150 # Office HCD 34394 (c) Total HCPs 199073 (c) Physician 61137 (c) Mid Level 3461 (c) Physician 61137 (c) Mid Level 3461 (c) Physician 61137 (c) Mid Level 3461 (c) Physician 61137 (c) Other HCD 34594 (c) Other Prescriber 4468 (c) Other Prescriber 4468 (c) Other Prescriber 4420 (c) Business professional	BSB B Hospitals	³) ☐ Hospitaits 17	1 ¹ / ₂ PHS 3408 2 ¹ / ₂ Group Practices 4 ² / ₂ Hospital Department 10 ⁴ / ₂ Laboratories 1 ¹ / ₂ Extended Care 439 ⁴ / ₂ Physicians 100 ⁴ / ₂ Mid Levels 7 ⁴ / ₂ Pharmaciets 25 ⁴ / ₂ Nurses (Non NP) 3 ⁴ / ₂ Other Prescribers 7 ⁴ / ₂ Business Profession 9 ⁴ / ₂ Other HCPs	 B Physicians B Physicians B Physicians Characteris Chara	A Physicians	

Rollup count details

All rollup counts on the Summary View are now links. Click the count to open a popup that displays the entity details for that group.

Example

On the Summary View, there are 862 Hospitals in the Cardinal Health HCO.

🚔 Explore HCOs (Direct 867 Total 13196)	& Explore HCPs (Di	rect 49 Total 343364)	- Summary View	
T Active Filters				
	Level 1	Level 2	Level 3	Level 4
	867 創 HCOs 49 畫 HCPs	8311 🖞 HCOs 331273 🌡 HCPs	3992 📋 HCOs 24665 🚢 HCPs	25 🖗 HCOs 6689 🎄 HCPs
Cardinal Health Inc Corporate Office 13196 ① Total HCOs 862 ② Hospital 17 ② Admin Only Location 4109 ½ PHS 340B	858 I Hospitals	3 Hospitals	1 UPHS 3408 2 Up Group Practices	8 ▲ Physicians 2 ▲ Mid Levels 1 ▲ Pharmacist

In the HCO breakdown section, click the Hospital (862) count.

A dialog opens to display all the accounts for the hospitals grouping for Cardinal Health.

(All 862 Hospitals in Cardinal Health Inc Corporate Office								
		Hospitals		Roll	Ups		НСО Туре	Major Class Of Trade	Specialty
•	A	Abbeville Area Medical Center	۵H	łco	4	ICP	Organization, Hospital	Hospitals	Multi Specialty P
	#hospital #npi 420 Thomson Cir Abbeville SC 29620-5656 US	DIRECT 5	TOTAL B	DIRECT 88	TOTAL 93				
		Acadia Hospital	⊕ HCO		畫 HCP		Organization, Hospital	Hospitals	Mental Health Pr
•	Phospital Phoi Ppsych 268 Stillwater Ave Bangor ME 04401-3945	DIRECT	TOTAL	DIRECT 194	TOTAL 194				
	• 🖪	Adair County Memorial Hospital #hospital #npi 609 SE Kent St Greenfield IA 50849-9454	y Memorial Hospital 🔹 HCO		& HCP		Organization, Hospital	Hospitals	Multi Specialty P
			DIRECT	TOTAL 4	DIRECT 34	total 34			
		Advanced Diagnostics Hospital East @hospital 12950 East Fwy Houston TX 77015-5710	⊜ HCO		畫 HCP		Organization, Hospital	Hospitals	Multi Specialty P
ŕ	0		DIRECT 1	TOTAL 1	DIRECT 35	TOTAL 37			
	A	Adventist Health Bakersfield	۵H	łco	±.	ICP	Organization, Hospital	Hospitals	Multi Specialty P
ŕ	0	#hospital #npi 2615 Chester Ave Bakersfield CA 93301-2014	DIRECT	TOTAL 17	DIRECT 414	TOTAL 465			
	A	Adventist Health Castle	th Castle 🗇 HCO		击 HCP		Organization, Hospital	Hospitals	Multi Specialty P
	0	Øhospital Ønpi 640 Ulukahiki St Kailua HI 96734-4454	DIRECT 5	TOTAL 6	DIRECT 299	TOTAL 300			

To view the HCO or HCP rollups for a specific level, click the count in a hierarchy level. For example, in Level 2, click the **3** count beside Hospitals.

The dialog displays only the hospitals on this level of the hierarchy.

	3 Hospitals on Level 2 in Cardinal Health Inc Corporate Office * Parent Organization: THospitals (858)						
۵	Hospitals	Roll	Ups		HCO Type	Major Class Of Trade	Specialty
	Carolinas Healthcare Blue Ridge	🖞 нсо	åн	ICP	Organization, CMS Teaching Hospital	Hospitals	Multi Specialty Practice
	Valdese #hospital #npi #sales #VCRM 720 Malcolm Blvd Valdese NC 28690	т тотац. 7	DIRECT 30	TOTAL 32			
• 田	Lawrence General Hospital	₫нсо	走 H	ICP	Organization, CMS Teaching Hospital	Hospitals	General Surgery
	#hospital #npi 1 General St Lawrence MA 01841-2961	T TOTAL	DIRECT 539	TOTAL 543			
•	Two Twelve Medical Center	₫ HCO	志 H	ICP	Organization, Hospital	Hospitals	Multi Specialty Practice
	Hospital 111 Hundertmark Rd Chaska MN 55318-1110	T TOTAL	DIRECT 9	TOTAL 9			

The left column in the group popups remains fixed as you scroll through the columns to view field details.

Tip: Any Active Filters that are applied to the hierarchy are also applied to entities in the rollup popups.



HCO count popup

When you click an HCO rollup count on the Summary View, the popup displays the following information:

• **Header** - Includes the HCO type and a count of the HCOs in the rollup and identifies the HCO that is the focus of the Summary View.

The location in the hierarchy and the parent organization (and count) also displays when you click the rollup count in hierarchy levels.

Example



858 Hospitals on Level 1 in Cardinal Health Inc Corporate Office Parent Organization: The Cardinal Health Inc Corporate Office

• HCO details - All the HCOs for the selected HCO type are listed in alphabetical order.

The details for each HCO include:

- HCO name and primary address Click the HCO name to close the popup and change the Summary View to focus on that HCO.
- Network hashtags
- Rollup counts for HCOs and HCPs Clicking a rollup closes the popup and opens the **Explore HCO** or **Explore HCP** tab with that HCO in focus.
- Child affiliations Click the **Caret** icon to expand the HCO and view child affiliation details.
- HCO fields All of the fields that display on the **Explore HCO** tab in the Hierarchy Explorer.

HCP count popup

Click an HCP rollup count on the Summary View to view details about the entities in the hierarchy.

۶.	430 Physicians on Level 3 in Cardinal Health Inc Corporate Office Parent Organization: II Hospitals (3)							
٤	Physicians	НСР Туре	Specialty	Medical Degree	Parent Organiza			
	Abbie James [#md] [#npi] [#physician] 26 Tamarac PI Aliso Viejo CA 92656-3307	Prescriber	General Surgery	Doctor of Medicine	Lawrence Genera			
	Abner Weir #md #npi #orthosurg #physician 575 Turnpike St Ste 11 North Andover MA 01845-5987	Prescriber	Orthopedic Surgery	Doctor of Medicine	Lawrence Genera			
	Adam Craig #md #npi #oto #physician 1511 Great Pond Rd North Andover MA 01845-1216	Prescriber	General Surgery, Otolaryngology	Doctor of Medicine	Lawrence Genera			
	Adam Stevens Øgastro Ørnd Ørnpi Øphysician Øprimarycare 260 Merrimac St Ste 1 Newburyport MA 01950-2192	Prescriber	Gastroenterology, Internal Medicine	Doctor of Medicine	Lawrence Genera			
	Allan Alnez and anp approximation approximation and approximation approximation and approximation a	Prescriber	Family Medicine (Formerly FP)	Doctor of Medicine	Lawrence Genera			



The popup displays the following information:

• **Header** - Includes the HCP type and a count of the HCPs in the rollup and identifies the HCO that is the focus of the Summary View.

The location in the hierarchy and the parent organization (and count) also displays when you click the rollup count in hierarchy levels.

Example



1 Physician on Level 1 in Cardinal Health Inc Corporate Office Parent Organization: Security Cardinal Health Inc Corporate Office

• HCP details - All the HCPs of the selected HCP type are listed in alphabetical order by first (given) name.

The details for each HCP include:

- Name and primary address of the HCP
- Network hashtags
- Parent Organizations Click the parent organization name to close the popup and change the focus of the summary view to that HCO.
- HCP fields All of the fields that display on the **Explore HCP** tab in the Hierarchy Explorer.



Profiles

Record owner for relationships

Relationship objects now contain Affiliation badges to identify if the relationship is locally managed, managed by OpenData, or managed by a third party data provider.

This is helpful for understanding who owns the affiliation data for troubleshooting purposes.

	 Parent Affiliations (3 active) 					
This relation	nship is mar	Palo Alto County Health System C maged locally. MERCENTER Provide a constraint of the constraint of th				
	H	CLASS OF WORK No Value Santa Clara Valley Medical Center 751 S Bascom Ave San Jose CA 95128-2604				
	0	RELATIONSHIP TYPE Individual to Organization Anniation CLASS OF WORK No Value Stepford Healtheare Heapital [7]				
	(H) ©	300 Pasteur Dr Palo Alto CA 94304-2203 HIERARCHY TYPE Individual to Organization Affiliation RELATIONSHIP TYPE CMS Hospital Claims CLASS OF WORK No Value				

This enhancement is enabled by default in your Network instance.

Supported objects

Affiliation badges are supported for Veeva relationship objects (Parent HCOs) and custom relationship objects.



Badges on Veeva relationship objects

Badges display below the HCO icon on **Parent Affiliation** and **Child Affiliation** summary cards on the Profile page and on profile previews.

The badges indicate the following:

- **Record owner** The badge color identifies the relationship owner.
 - Gray Locally managed records (not in China).
 - Green Locally managed records that are in China.
 - Orange Veeva OpenData managed records.
 - Blue Third-party managed records.
- Relationship status and state The badge is dimmed if the relationship status (parent_hco_status_v) is not Active or the relationship record state (record_state_v) is not Valid or Under Review.

Related entity

The record state and status of related entity (HCO) can be different from the relationship's state and status.

Example

The related entity in this parent affiliation is inactive, but the relationship is active and valid. In this case, only the HCO icon is dimmed.

Gateway Family and Urgent Care #crm #neuro-target 751 S Bascom Ave San Jose CA 95128-2604 HCO TYPE Organization, Group Practice HIERARCHY TYPE Operating/Ownership Hierarchy RELATIONSHIP TYPE Ownership	O Inactive
---	----------------------

Tip: When the **Inactive** badge displays on summary cards, it identifies that either the related entity or the relationship is not active.



Examples of badges

In these examples, the related entity (HCO) is managed by Veeva OpenData and the Parent HCO relationship is locally managed.

Related Entity	Relationship	Object Icon and Affiliation Badge
Record status = Active and Record state = Valid/Under Review	Relationship status = Active and Record state = Valid/Under Review	(H) ©
Record status = Active and Record state = Valid/Under Review	Relationship status = not Active or Record State = not Valid/Under Review	(H)
Record status = not Active or Record State = not Valid/Under Review	Relationship status = Active and Record state = Valid/Under Review	(H) ©
Record status = not Active or Record State = not Valid/Under Review	Relationship status = not Active or Record State = not Valid/Under Review	

Tooltips

Relationship owner

Hover over the badge to quickly understand the owner of the relationship.



Relationship status and state

If the relationship is not Active or is not Valid/Under Review, the tooltip explains why the Affiliation badge is dimmed.



The relationship state or status does not display in the tooltip if the relationship is Active and Valid/Under Review.



Badges on custom relationship objects

Custom object relationships are always managed locally. The Affiliation badge can help you to easily identify which objects on the Profile page are relationship objects.

You can also use the badge to identify which relationships are not Active or Valid/Under Review.

Badges display below the custom object relationship icon on summary cards on the Profile page and on profile previews.

 Pack 	 Packages (2 active) 					
— ©	Cholecap 0.5 mg Bottle - 30 Tablets C ENTITY TYPE Package					
0	Cholecap 0.5 mg Bottle - 60 Tablets C ENTITY TYPE Package					
➡ Bran	➡ Brands (1 active)					
•	Cholecap C ENTITY TYPE Brand					

SEND TO OPENDATA

Add requests that are sent to OpenData now retain the default message, OpenData Takeover Request, in the Requester Notes.

Local Data Stewards can add comments to the Requester Notes to help OpenData verify the add request. Comments are now appended after the default message so OpenData Data Stewards can easily identify these types of requests.

This enhancement is enabled by default in your Network instance.



Data model

INACTIVATING FIELDS

Inactivating a data model field can impact Network hashtags. If the field is used in hashtag rules, those hashtags will also be inactivated. To ensure that Administrators and Data Managers are aware that hashtags will be inactivated, the list of affected hashtags now displays in the confirmation dialog before a field is inactivated.

Confirm: Inactivate 340B_eligiblev	×
Inactivating this field will result in the following actions:	
★ To be inactivated HASHTAGS #340B	
▲ To be impacted GENERAL This field will no longer appear on profile pages and data stored in the field will not be retrievable in reporting.	
Are you sure you want to inactivate this field?	
Cancel Yes, Inactivate This Fie	ld

This enhancement is enabled by default in your Network instance.

Inactivated hashtags

When a field is inactivated, hashtags that use the field in a rule are inactivated and the modified date for those hashtags is updated (**Data Model > Network Hashtags**).

Network Hash	itags				Add Hashtag
Search by #hashtag or des	scription Q Show of	lisabled hashtags	All Entities 🔻	All Countries 👻	Reset filters
HASHTAG A	DESCRIPTION	LAST MODIFIED	ENTITY TYPE	COUNTRY	STATUS
#340B	The HCO is 340B eligible.	May 26, 2023	HCO	Australia, Belarus	DISABLED



PASSWORD MANAGEMENT

For security, users are locked out of Network after five consecutive login attempts. To regain access to Network, Network Administrators can now unlock your account or reset your password. Previously, resetting your own password was the only option.

These new options are supported for active users that do not use single sign-on.

This enhancement is enabled by default in your Network instance.

Managing accounts from the user page

When you become locked out of your account, Administrators can now unlock your account so you can continue using your current password, or they can reset your password if you have forgotten it.

john.smith@verted	Cancel	Reset Password	Unlock	Save		
Primary Information						
Status	Active		•			
Username	john.smith	@verteo.com				
Email	john.smith@verteo.com					
User type	Data Steward		•			
Inbox Task Groups	Data Stewards 🛛 🗏					
Last Login	2023-05-04 21:07:04 IST					

To manage a user's password:

- 1. In the Admin console, click Users & Permissions > Users.
- 2. Select the user to open their account page.
- 3. Click Unlock or Reset Password on the user page.
 - Unlock Allow the user to regain access Network using their current password.

Note: The Unlock button displays only if an active user is locked out.

A message displays to indicate that the user has been unlocked.

			Unlocking user successfu	ul. 🤊 Recent 🗸	🛔 PM 🗸 Neb	vork 🌟 Starr	red 🕈 What's Ne	sw 🕜 Help
ogs	USERS & PERMISSIONS	DATA MODEL	SYSTEM INTERFACES	WIDGETS & PORTAL	FILE EXPLORER	SETTINGS	INTEGRATIONS	PRODUCTION
jo	ers » john.smith@verteo.com hn.smith@verte	eo.com			Cano	el Reset Pa	assword Unioc	k Save



• **Reset Password** - The user will receive an email to reset (change) their password so they can regain access to Network. This button displays on all user account pages by default.

After you click the button, confirm that you want to reset the password for this user.

Reset Password	ж
Are you sure you want to reset this user's password?	
The user will be required to enter a new password to login to Veeva Network.	1
No	s

A message displays to indicate that the password reset is complete.

Users will receive an email to notify them that their password has been reset. The email is sent from network-emails@veevanetwork.com.

Veeva Network
Password Reset
A password reset has been requested for the Veeva Network account associated with this email address. If you did not request this reset please contact your system administrator.
Your user name is given below:
User Name: cyril.standard@verteo.com lev.com
Instance URL: verteo.com
Note that passwords are case-sensitive. Make sure that you choose a password that you can remember, but complex enough
not to be guessed by others.
This link expires in 24 hrs.
-Your Network Team
Reset Password

Users can click **Reset Password** to change their password and regain access to Network.

The link to reset the password can be used once and expires after 24 hours.

Tracking password management

Login Audit History

Administrators can view the Login Audit History to see when user has been locked out.

Login Audi	t Histor	y							Expor
Date range	То	U	ser Name			User Type			
2023-05-04	2023-05-05	m 5	Select a us	ser name	*	Select a u	ser type	🔻 🛛 Get H	story Reset
Choose time period 👻									
TIMESTA	MP	USER NAME	E	USER TYPE	SOUR	RCE IP	TYPE	STATUS	BROWSER
2023-05-05 00:20:39	IST john.smi	th@verteo.o	com Da	ata Steward	142.188.8.4	47	User Locked Out	User Locked	Chrome 112.0.0.0
2023-05-05 00:20:39	IST john.smi	th@verteo.o	com Da	ata Steward	142.188.8.4	47	User Login	Invalid Password	Chrome 112.0.0.0
2023-05-05 00:19:42	IST john.smi	th@verteo.o	com Da	ata Steward	142.188.8.4	47	User Login	Invalid Password	Chrome 112.0.0.0
2023-05-05 00:19:33	IST john.smi	th@verteo.o	com Da	ata Steward	142.188.8.4	47	User Login	Invalid Password	Chrome 112.0.0.0
2023-05-05 00:19:10	IST john.smi	th@verteo.d	com Da	ata Steward	142.188.8.4	47	User Login	Invalid Password	Chrome 112.0.0.0
2023-05-05 00:19:03	IST john.smi	th@verteo.o	com Da	ata Steward	142.188.8.4	47	User Login	Invalid Password	Chrome 112.0.0.0

System Audit History

The System Audit History tracks the user who unlocked the user or reset the password.

Unlock

System Audit History								Export
Date range To Object Types Properties								
2023-05-04	2023-05-05	Select an option	Selec	Select an option Get History				Reset
Choose time period 💌								
EVENT ID	TIMESTAMP	USER NAME	ITEM	EVENT DES	SCRIPTION	OBJECT TYPE	PROPERTY	NEW VALUE
942694768613461151	2023-05-05 01:31:12 IST	pm.admin@verteo.com	john.smith@verteo.com (Joh User unlock	ed	User	unlockUser	true

Password reset

Syste	System Audit History								Export
Date rang	e	Тө	Object Types	Propert	os				
2023-05	-04 🟥	2023-05-05	Belect an option	Select	an option	Get History	Reset		
Choose 1	time period.	. •							
et id	TIN	IESTAMP	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE	PROPERTY	NEW VALUE	OLD VALUE
79087263	2023-05-05	5 18:17:54 IST	pm.admin@verteo.com	john.smith@verteo.com (John S	Property *Must change password	User	changePassword	true	faise



Network integrations

HASHTAGS IN VEEVA CRM

Network hashtags are stored in the **Account Identifier** field by default in Veeva CRM. If you already have data in that field, you can choose to store hashtags in an alternate .

To support an alternate field for hashtags in CRM, Network has a new field called CRM Hashtags (crm_hashtags ___v). You can map this Network field to your custom field in CRM. When the Network Bridge runs, hashtags are calculated in the Network field and are pushed to CRM to display in the custom field.

This feature is disabled by default. To enable it for your Network instance, contact Veeva Support.

Field details

When the feature is enabled in your Network instance, the **CRM Hashtags** field is available for HCP and HCO objects (**Data Model**). The field is read-only; it cannot be edited by submitting a data change request.

The field value is empty in target subscriptions and throughout the Network application (for example, Network Reporting) because hashtags are dynamically calculated.

Edit Field – CRM Hashtags FIELD On this page: Properties · Search Behaviour · Country Visibility and Field Rules · Labels · Source Rankings							
 Properties 							
Name 😡	crm_hashtagsv						
Effective Version @	23R2.1						
Туре 😡	Text						
Length 😡	255						
Enabled?							
Description *	Network Bridge use only. Field should only be enabled if Network cannot be used to manage CRM Account Identifier or if CRM hashtags need to be stored in a different CRM field. Field exports empty values for target subscription and reporting.						
Restricted	Field is Not Restricted. C Add Field Restriction						
▶ Search Behavlour							
Country Visibility and Field Rules							
Countries	Network Objects						
114 out of 114 countries	Health Care Organization, Health Care Professional						
▶ Labels							



Veeva CRM configuration

To use the crm hashtags v field, configure CRM to accept the field from the Network Bridge.

The following configuration is required in Veeva CRM:

• Field mapping - Map the crm_hashtags __v field between CRM and Network.

CRM Field API Name	Network Field API Name
Network_Hashtagsc	crm_hashtagsv

For details, see Network field mapping in the Veeva CRM Online Help.

• Network Managed Account Identifier Network Setting- The setting value must be set to 1 or 2.

Setting value 1

If the **Network Managed Account Identifier** Network Setting is set to 1, only the alternate field, Network hashtags ______ c is populated with hashtags in CRM.

Veeva ID field	Network_hashtagsc
942356340136150623	#md #npi #physician #salesdata #targetAllergy #targetOncology #targetNeurology #targetUrology
942356333379585631	#nurse

Example – Hashtags in Network Account Search

Hashtags display in the custom field on the account. In the **Outside Territory** search results, the hashtags display in the **Account Identifier** only for the UI.



				My A	ccounts	~			
		Table		Мар					
ľ	Cance	9		S	earch			New Acc	ount
Before creating a new account, you must search				for possible existing a	iccounts. 1	Try using Network Ha	ashtags (e.g. #md #	#hospital #healthsys	stem)
h Goldlake #md City, S			itate or Address of HCP/HCO				✓ Search		
Inside Territory (1) Tsao, Mary @ Gwynn Goldlake Medical XYZ-ABC 175 High St Sap Direct CA 82101					Tsao, Ma	ry @ Gwynn Gold	dlake Medical Ce	View Ac	count
ŀ	Outside Territory (19+) () Robert Goust @ Atlanticare Regional #md #npi #physician #urology 150 Midlantic Dr Ste 10 Mount Laurel NJ 08054-1573 Robert Goust @ Atlanticare Regional #md #npi #physician 103 Main Laurel NJ 08054-1573 Robert Goust @ Atlanticare Regional Image: State of the state o		i) nal	Account Identifier	XYZ-ABC	Professio	nal		
l				Primary Parent					
l			Med	Medical Degree	MD), CA 92101			
			Medic re	Specialties Endocrinology, Diabetes, & Metabolism					
ŀ	CA 92101 Chau Wan @ Gwynn Goldlake Medie		lic	Alt Key	PMCYAS5	YK0-858-Z9B			
	(1)	#md #npi #phsymed #physician 11 E 20th St San Diego CA 92101		Network Hashtags	#choleca	oSales #endo #md #	npi #physician		
		Beto Toson @ Gwynn Goldlake Me	dic	Address (2)					

Setting value 2

If the Network Managed Account Identifier Network Setting is set to 2, the Account_Identifier_vod_c field and the alternate field, Network_hashtags_c are populated with hashtags in CRM.

Note: There is no maximum length for Network_hashtags___c field so additional hashtags might display.

Account_Identifier_vodc (max length: 80)	Network_hashtagsc
#md #npi #physician #salesdata #targetAllergy #targetOncology #targetNeurology	#md #npi #physician #salesdata #targetAllergy #targetOncology #targetNeurology #targetUrology
#nurse	#nurse
	Account_Identifier_vodc (max length: 80) #md #npi #physician #salesdata #targetAllergy #targetOncology #targetNeurology #nurse



Example – Hashtags in Network Account Search

Hashtags display in the Account Identifier field and the custom field for Outside Territory results.



For details about this setting, see Network hashtags in CRM in the Veeva CRM Online Help.

Network Bridge

When the Network Bridge runs, it validates that the crm_hashtags_v field is enabled in Network and that the CRM configuration is complete to determine if the hashtag values should be updated in CRM.

The field is supported for:

- CRM Windows
- CRM Online
- CRM for iPad



API

CUSTOM FIELDS IN OPENDATA SEARCH RESULTS

Custom fields that contain default or calculated values can now display in the Search API for OpenData search results.

Custom fields can be created to store calculated (formula) fields in Network. For example, you can use a lookup table in a NEX rule to populate restricted products into a custom field. These fields can use OpenData values as part of the formula, however, custom fields do not display in search results for records still in the OpenData instance.

Administrators can use a new setting on custom fields to display the default or calculated field values on search results to help end users select the relevant entity to download in Veeva CRM.

Sustomer Master > Health Care Profession	nal > Edit Field - Restricted Products		
dit Field – Restricte	ed Products		
IELD In this page: Properties · Search Beh	aviour * Country Visibility and Field Rules * Change Procedure * Labels * Source Rankings	Cancel	Save
▶ Properties			
▶ Search Behaviour			
 Country Visibility and Field 	Rules		
Countries	Network Objects		
Countries *	United States ×		
Network Objects *	Health Care Professional ×		
Rule Type	NEX Rule	٣	
NEX Rule	<pre>join(LOOKUPN('spec_matrix_t', 'dtl_prdct_nm', 500, spclty_id: specialty_1v, prmntl_dsgntn_id: 'Exclude from Promotion'),";;")</pre>		
Required / Update 😡	Verify		
Calculate for search results from Open	iData 🛛 🗾		
		Remove	Done

This enhancement is not available by default. To enable it for your Network instance, contact Veeva Support.

After the enhancement is enabled, Administrators and Data Managers can enable the setting on custom fields.

Note: This setting displays default or calculated fields on search results for Veeva OpenData records in the Search API and in Veeva CRM.

It does not display the field values when you are previewing OpenData records to download in the Network UI or in Network Widgets.



Enable the field setting

The **Calculate for search results from OpenData** setting is available on custom fields for all Veeva standard objects.

To enable the setting:

1. Open a custom field (Data Model) on a Veeva object.

Note: This setting is not supported for the following custom field types: Primary (Network Calculated or Unique Checkbox) and Alternate Key.

2. In the **Country Visibility and Field Rules** section, select the **Calculate for search results from OpenData** setting.

The setting is available for NEX Rule and Default Value rule types.

Support for NEX rule expressions include Lookup functions.

3. Save your changes.

When you search for a record, the field with the default or calculated (NEX rule) value displays on OpenData records that have not yet been downloaded to your Network instance.

Important: The default or calculated value cannot be used to filter for records in Veeva OpenData. The values are calculated for search results only.

Example

When a sales rep searches for an HCP in Veeva CRM, the **Restricted Products** custom field displays with the calculated value so the rep can decide if they should download the record from OpenData.

					My A	ccounts	×			1	÷
	List		Table		Мар						
Select		Cance	al		S	earch			New Account		
•	Adven 601 E Rel	Before Search Acks	creating a new account, you mus Terms erman #md	Location	for possible existing a	ccounts.	Account Type	~	Search	D	
•	Adven 1509 Will	Inside 1	Ferritory (1) Ackierman, Clinton						Add Account	3	-
	Akbik, 18101 Lor	Outside	mailergy and aphysician 1111 S Figueroa St Los Angeles, CA 90015 • Territory (11) Jessica Ackerman		Account Identifier	ëmd ëpec	Clinton Acken	man		3	
8	Alvare	8	#md #oncology #pediatrics #phy 4650 W Sumet Blvd Los Angeles CA 90027-6062 Redd Ackerman	sician	Specialties	Pediatrics				B	
		find #orthosurg #physician 3551 Trousdale Pkwy Los Angeles CA 90089			Credentials	MD					
8	200 W 1s	8	Tommy Ackerman #cardio #md #physician 1000 Vin Scully Ave Los Angeles CA 90090-1112		Primary Parent	Rady Chile 3030 Chil	drens Hospital Of San I drens Way San Diego (Diego CA 92123-4232		Ð	
	Ander: 810 Cour	8	Patricia Ackerman #md #physician #primarycare 1111 S Figueroa St Los Angeles CA 90015-1300		Address (1)	RESTOLA	R;;NATEVBA;;CHOLEC/	AP,;LUNESTA		B	
8	Ander: 2500 Cor		Clinton Ackerman #md #pediatrics #physician 3030 Childrens Way San Diego CA 92123-4232		3030 Childrens Wa	y San Dieg	o CA 92123-4232			B	



Search API

When Integration Users search for records, custom fields with the **Calculate for search results from OpenData** setting enabled will display the default or NEX rule calculated value in the Search API response.

Example response

The Calculate for search results from OpenData setting is indicated by the resultIsFromMaster value.

```
"responseStatus": "SUCCESS",
"entities": [
       "entityId": "942733982759126623",
       "entityType": "HCP",
       "metaData": {
           "highlights": { ____},
           "vid_v": "942733982759126623",
           "canDownloadFromMaster": true,
           "highlightTerms": [
           "resultIsFromMaster": true,
           "fromMasterInstance": 301,
           "relevance": 122.82719
        },
       "entity": {
           "gender__v": "M",
           "specialty_1__v": "PD",
           "hcp_type_v": "P",
           "first_name__v": "Clinton",
           "master_vid_v": "942733982759126623",
           "record_owner_type__v": "VOD",
           "record_delta_id__v": "942733982817222655",
           "last_name__v": "Ackerman",
           "record_owner_name__v": "OpenData",
           "medical_degree_1__v": "MD",
           "kaiser__v": "N",
           "formatted_name__v": "Clinton Ackerman",
            "primary country v": "US"
           "restricted_products__c": "RESTOLAR;;NATEVBA;;CHOLECAP;;LUNESTA",
           "hcp_status__v": "A",
           "vid_v": "942733982759126623",
           "is_externally_mastered__v": false,
           "specialty_1_rank__v": 1,
           "created_date__v": "2023-05-11T15:43:53.000-07:00",
            "pdrp_optout__v": "N",
           "is_veeva_master__v": true,
```



MATCH API

Reference value labels and reference aliases are now supported in Match API results.

API version

The parameters are supported for Network API version 29. If the parameters are used in earlier API versions, they are ignored.

Parameters

New optional parameters:

- enrichedResults Specifies whether or not to display labels for reference type fields in the results.
- resultLanguage Specifies the language to use if the enriched results option is enabled. Uses the IETF BCP 47 language standard.
- systemName When provided, Network returns target alias values defined for reference codes for this system. Otherwise, Network returns default reference code values.

Display reference value labels

Use the following parameters to display the reference value labels in the Match API:

- enrichedResults
- resultLanguage

Example request

Return reference value labels in English (en).

```
POST
https://{{DNS}}/api/{{version}}/match/?enrichedResults=true&resultLanguage=
en
```

Note: Language labels are indicated by value u fields.



```
{
     "responseStatus": "SUCCESS",
     "results": {
         "matchSetup": {...},
         "sourceEntity": {...},
         "matchedEntities": [
             {
                 "metaData": {...},
                 "matchResult": {...},
                 "entityType": "HCP",
                 "entityId": "940676573928359999",
                 "entity": {
                      "addresses v": [
                         {
                              "address line 1 v": "7777 Southwest Fwy Ste
540",
                              "locality v": "Houston",
                              "premise v": "7777",
                              "thoroughfare v": "Southwest Fwy",
                              "administrative area v": "US-TX",
                              "administrative area v value u": "Texas",
                          }
                      ],
                      "email 1 v": "cooper.lopez@gmail.com",
                      "vid v": "940676573928359999",
                      "first name v": "Cooper",
                      "last_name v": "Lopez",
                     "specialty_1__v": "GS",
"specialty_1__v_value__u": "General Surgery",
                      "primary_specialty_group__v": "G-SURG",
                      "primary specialty group v value u": "Surgery",
                      "medical degree 1 v": "MD",
                      "medical degree 1 v value u": "Doctor of Medicine",
                      . . .
                 }
             },
             . . .
        ]
    }
}
```



Display reference alias names of reference values

Use the following parameters to display the reference value labels in the Match API:

- systemName
- enrichedResults

Reference aliases

Reference aliases can be defined in **System Interfaces > Reference Aliases** for any source system defined in your Network instance.

Example reference alias

Reference Aliases	> demo Reference Aliases - S	pecialty	System: demo	▼ Type: Specialty ▼			
demo Reference Aliases – Specialty Import Export							
TARGET ALIAS	TARGET ALIAS NAME	NETWORK CODE +	NETWORK NAME	SOURCE ALIAS(ES)			
Peds Alias	Peds Alias Name	PD	Pediatrics	Peds Alias			
			Sho	w 50 💙 < 1 of 1 >			

Example request

Return the target alias names from the system called *demo*.

POST
https://{{DNS}}/api/{{version}}/match/?enrichedResults=true&systemName=demo

Note: Target system alias names are indicated by value u fields.



```
{
     "responseStatus": "SUCCESS",
     "results": {
         "matchSetup": {...},
         "sourceEntity": {...},
         "matchedEntities": [
              {
                  "metaData": {...},
                  "matchResult": {...},
                  "entityType": "HCP",
                  "entityId": "940676573928359519",
                  "entity": {
                      "addresses v": [
                          {
                              "address line 1 v": "7777 Southwest Fwy Ste
540",
                              "locality v": "Houston",
                              "premise v": "7777",
                              "thoroughfare v": "Southwest Fwy",
                              "administrative area v": "US-TX",
                              "administrative area v value u": "Texas",
                          }
                      ],
                      "email 1 v": "astrid.gonzales@gmail.com",
                      "vid v": "940676573928359519",
                      "first name v": "Astrid",
                      "last name v": "Gonzales",
                      "specialty_1__v": "Peds Alias",
"specialty_1__v_value__u": "Peds Alias Name",
                      "primary_specialty_group__v": "G-PD",
                      "primary specialty group v value u": "Pediatrics",
                      "medical degree 1 v": "MD",
                      "medical degree 1 v value u": "Doctor of Medicine",
                      . . .
                 }
             },
              . . .
        ]
    }
 }
```



Display reference aliases

Use the following parameter to display the reference aliases for reference values in the Match API:

• systemName

Example request

Display reference aliases for the source system called *demo*.

POST https://{{DNS}}/api/{{version}}/match/?systemName=demo

```
{
     "responseStatus": "SUCCESS",
     "results": {
         "matchSetup": {...},
         "sourceEntity": {...},
         "matchedEntities": [
             {
                 "metaData": {...},
                 "matchResult": {...},
                 "entityType": "HCP",
                 "entityId": "940676573928359519",
                 "entity": {
                      "addresses v": [
                          {
                              "address line 1 v": "7777 Southwest Fwy Ste
540",
                              "locality__v": "Houston",
                              "premise v": "7777",
                              "thoroughfare v": "Southwest Fwy",
                              "administrative area v": "US-TX",
                          }
                     ],
                      "email_1__v": "astrid.gonzales@gmail.com",
                      "vid v": "940676573928359519",
                     "first name v": "Astrid",
                      "last name v": "Gonzales",
                      "specialty 1 v": "Peds Alias",
                      "primary specialty group v": "G-PD",
                      "medical degree_1__v": "MD",
                      . . .
                 }
             },
             . . .
         ]
     }
 }
```



Submit reference aliases

Use the following parameter to submit a Match API request using source aliases:

• systemName

Example request

POST https://{{DNS}}/api/{{version}}/match/?systemName=demo

```
{
    "entity_type": "HCP",
    "entity": {
        "first_name_v": "Astrid",
        "last_name_v": "G",
        "primary_country_v": "US",
        "specialty_1_v": "Ped Alias"
        "addresses_v": [{
            "administrative_area_v" : "TX"
        }]
    }
}
```