Veeva Align

19R2.1 Release Notes

June 2019

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Introduction

Many new features can be enabled with Veeva Align 19R2.1. This document provides a brief explanation of each new feature and updates to existing features.

No new objects or fields were introduced in Veeva Align 19R2.1.

User Visible Changes

Targeting

- Search results now highlight when searching in Targeting Feedback
- Values of custom mc_cycle__aln fields are now included when cloning an MC Cycle
- All territories in a modeling project must now be in the Feedback Complete lifecycle state before the project can be approved. When changing the lifecycle state of the parent territory, all child territories inherit this state to enable approval of a project.

Targeting Enhancements

Feedback for Child Accounts

Align now enables users to provide feedback on territories using Child Accounts. This streamlines the planning process in these territories by allowing end-users to view and challenge changes to their territory directly on their device.

For example, Sarah Jones's territory uses Child Accounts when creating targets; accounts have different targeting statuses and goals depending on the location. When Sarah views changes to her territory using Targeting Feedback, she reviews changes made to each account and each location associated with that account.

Prerequisites

The following features must be configured to enable this feature:

- [Targeting Feedback](#)
- [Child Accounts in MCCPs](#)

Use

When a user's territory is configured to use Child Accounts for targeting, the Accounts tab in Targeting Feedback displays location specific information as rows associated with the account row.

The base account displays as a row with an empty Location field.

Searching for a location displays the account associated with the location and all locations associated with the matching account.

Users can display cycle channel and cycle product information for each individual location by enabling the **Show Target Details** toggle.

Challenging

Users can challenge the targeting status and interaction goals of individual locations associated with an account.

To challenge an alignment or targeting designation:

1. Select the appropriate **Location** row for the appropriate account. This displays the account card.
2. Select the appropriate location in the **Location** picklist. The value of this picklist automatically populates with the location selected in step 1.

   > Account-level challenges, for example, Add Account or Remove Account, do not need a location selected. Target-level challenges, for example, Add Target or Remove Target, only apply to the selected location.

3. Select the appropriate challenge.
4. Select the challenge reason.
5. Repeat steps 2-4 for all desired locations.
6. Select **Save**.

All challenges are checked against all existing approval rules with the following outcomes:

- Rejected – An error displays stating which challenge was rejected and why

  > If one challenge is rejected, none of the other submitted challenges are approved, even if they would otherwise be approved. The user must resolve the rejection and try again.

- Approved – The challenge was automatically approved

  > Approved Remove Account challenges remove all targets in the cycle plan associated with the account, regardless of location.

- Pending – A challenge did not match any Approval or Rejected-type rules and must be reviewed by the user's manager

Approved and Pending challenges display in the Accounts table based on the specific Location row.

Product Metric Combinations

Administrators can use the RECORD_AND logical operator on the product metrics section of the rules engine to require an account have two or more records matching each part of the product metric logic statement in order for the statement to evaluate as true. This enables administrators to configure logic filters that consider an account's value over a range of products rather than the metrics for individual products.

For example, the Align administrator wants to designate accounts as targets only if they are of a high enough segment for all three major products, rather than each product individually. The administrator configures the product metrics section of the rules engine to state an account must qualify as Segment A on three separate product metric records (one for Cholecap, one for Restolar, and one for Labrinone) in order for the logic filter to evaluate as true and designate the account as a target.

The RECORD_AND logical operator is available by default.

Use

To use the RECORD_AND operator:

1. Navigate to the **Product Metric Criterion** section of the appropriate Targeting Rule.
2. Select the **Add New Product Metric Section** button.
3. Enter the appropriate criteria for the new Product Metric section.
4. Select **Save**.

Figure 1: The New Product Metrics Section Button

Administrators can use the Align Data Loader to load Product Metric criteria with the RECORD_AND operator using the following format:

(PRODUCT_METRIC_1) RECORD_AND (PRODUCT_METRIC_2) RECORD_AND…

Example

For example, the administrator decides to determine the number of calls an account receives in a cycle based on a combination of the account's segment in two products, Cholecap and Restolar, rather than one of the products. Using Product Metric Combinations, accounts that are a high segment of both products receive a higher activity goal than accounts that are a high segment of one product, but not the other.

In this case, the administrator configures the product metrics section of the rules engine to assign different activity goals to targets based on the account's segment in two products: Cholecap and Restolar.

	Cholecap Segment A	Cholecap Segment B
Restolar Segment A	12	9
Restolar Segment B	10	8

Table 1: Product Metric Combinations Example

This is accomplished using the following four logical statements:

- (Product = Cholecap AND Segment = A) RECORD_AND (Product = Restolar AND Segment = A)
- (Product = Cholecap AND Segment = A) RECORD_AND (Product = Restolar AND Segment = B)
- (Product = Cholecap AND Segment = B) RECORD_AND (Product = Restolar AND Segment = A)
- (Product = Cholecap AND Segment = B) RECORD_AND (Product = Restolar AND Segment = B)