Veeva Network

Veeva Network 24R1.1.1 Release Notes

June 2024

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About these Release Notes

These Release Notes describe all features that will be included in Veeva Network 24R1.1.

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

The following enhancements have been added since the Sandbox Release Notes were published.

- **Cluster Management** – Updated cluster codes from IQVIA™ are available for the Czech Republic and Slovakia.

The following enhancements have been added since the Early Release Notes were published.

- **Key Networks** - Search results and record profiles are updated to display only the key network's alias and icon on affiliated HCPs and HCOs; the corporate name no longer displays.
- **Data Privacy** – OpenData now manages HCP opt outs for 23 countries in the Latin America region.

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 24R1.1 minor release.

		ST	DS	DM	AD
General					
Deprecated features	The Data Migration, System Summary, and Merge Sync features have been removed from Network.	●	●	●	●
Affiliation Widget					
Text setting	Administrators can control the ability to add text to the influence map canvas.	●	●	●	●
Key networks					
Key network search	To condense search results, only the key network's alias and icon display affiliated HCPs and HCOs; the corporate name is removed.	●	●	●	●
Data change requests					
DCR attachments	Several enhancements have been added to support image attachments on DCRs.	●	●	●	●
OpenData DCRs	DCRs containing inactive or custom reference codes are no longer auto-rejected.	●	●	●	●
Matching					
Conditional matching	Subscription-level match filters can be applied to all match rules for an entity.			●	●
Match counts	Counts display on all tabs in the match configurations.			●	●
Filtering on individual match rules	A message displays to inform users that filters are supported for Direct Field match comparisons only.			●	●

		ST	DS	DM	AD
Data Privacy					
HCP opt out	OpenData now manages opt outs for 23 countries in the Latin America region.			●	●
Data Model					
New language	Ukrainian (UK) is now supported for reference data.			●	●
Cluster Management	Updated cluster codes from IQVIA™ are available for Belgium, Czech Republic, and Slovakia.			●	●
Primary custom fields	New primary fields support Unique Checkbox configurations only.			●	●
Custom Domains					
Global entities	Custom objects that do not have a primary country can be created.			●	●
Network Expressions					
New operators	NEX rules now support UNION, UNION ALL, and INTERSECT operators.			●	●
Systems					
Viewing systems	The sort order on the Systems page is retained for each user.			●	●
Transformation rules					
Network widget support	Transformation rules can now be used to transform data that is downloaded from the Search widget and Profile DCR widget.			●	●
Network API	Rules can be applied to the Search and Retrieve API for a system.		Developers		
Exporting configurations	Transformation rules can be exported from source environments to target environments.				●
Vault CRM					
Vault CRM Bridge	The Bridge now supports updating multiple object types in Vault CRM.			●	●
DCR enhancements	Administrators can monitor the status of DCR updates using the Task Audit Log.				●

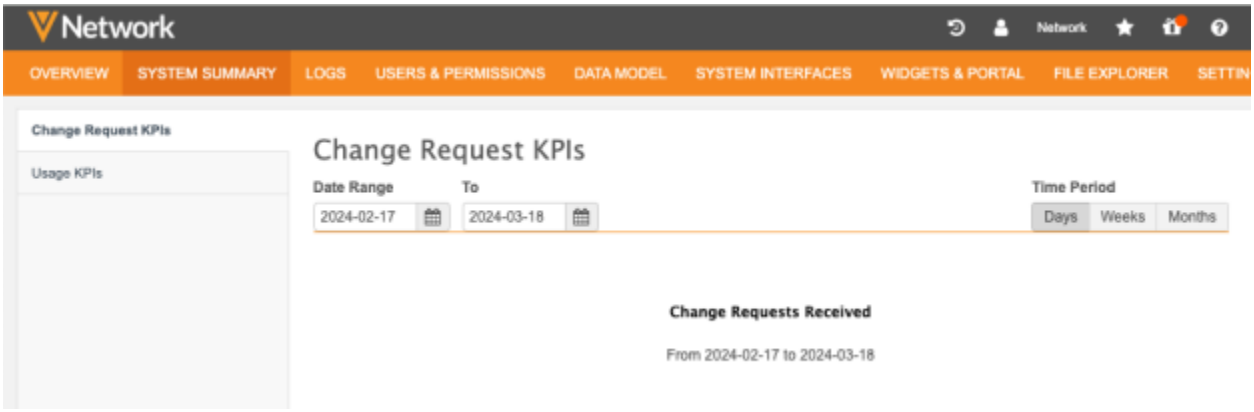
Note: The System and Data Admin user has all the capabilities of the System Administrator and Data Steward users. Features and enhancements that apply to those users also apply to the System and Data Admin user.

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.

Deprecated features

The following features have been removed from the Network UI:

- **Data Migration** (System Interfaces)
- **System Summary** (Admin console) - This includes the Change Request KPIs and Usage KPIs pages.



- **Merge Sync** - (OpenData Subscriptions) This feature was available only for China.

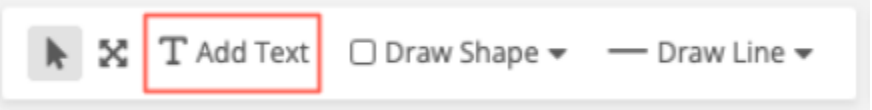
Affiliation widget

TEXT SETTING

Administrators can choose to allow users to add text to the Influence Map. A new setting, **Add Text**, is added to the Affiliation widget configuration.

By default, the **Add Text** setting is on.

If Administrators turn off the **Add Text** setting, any current text remains on the influence map but users will no longer be able to add text. The **Add Text** option will be hidden on the **Edit Canvas** toolbar on the Influence Map.



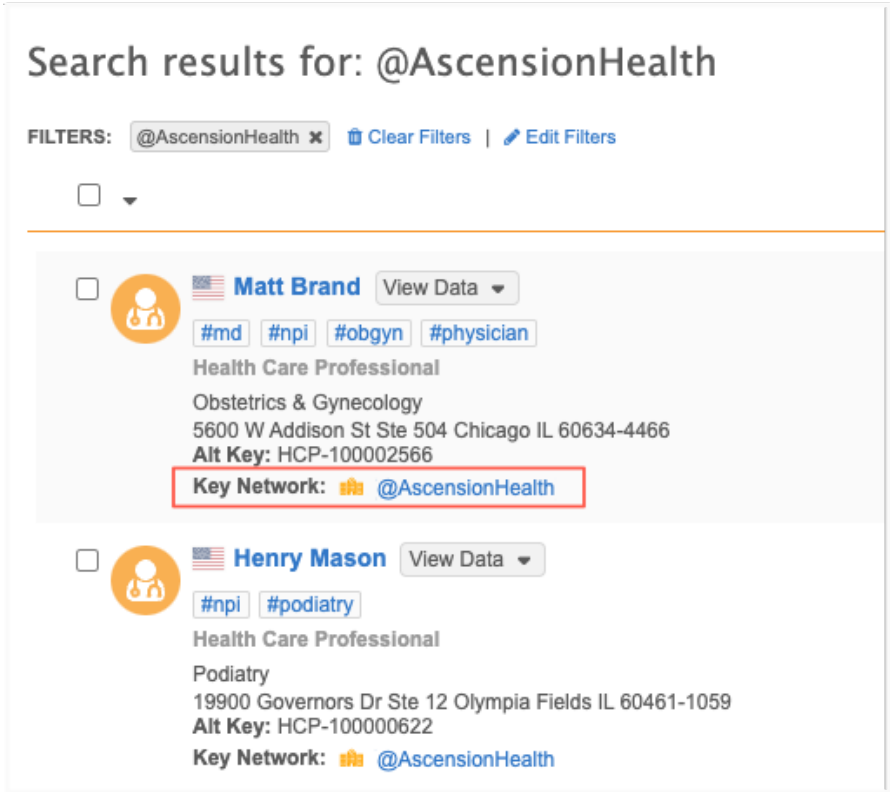
This enhancement is enabled by default in your Network instance.

Key networks

SEARCH AND PROFILES

Search results and record profiles are updated to display only the alias (for example, @AscensionHealth) and icon of the key network on affiliated HCPs and HCOs. Previously, the corporate name also displayed.

This change reduces the details users need to scan on the search results and provides additional room to display more key networks if they exist for a record.



This enhancement is enabled by default in your Network instance. Searching for key networks is supported for US and UK OpenData records by default.

For details about this feature, see Key HCO network search in the *Veeva Network Online Help*.

Data change requests

DCR ATTACHMENTS

Attachments can be added to add and change requests to provide supporting information or evidence that Data Stewards can use to quickly validate the requests.

In this release, the enhancements have been added to support users that submit data change requests (DCRs) and for Data Stewards that process the requests.

Enhancements for users submitting DCRs

- Increase in maximum file size
- Support for more detailed image captions
- General guidelines for safe DCR attachments

Enhancements for Data Stewards

- Support for previewing .heif/.heic images on browsers
- Previewing captions and images

Most of these enhancements are enabled by default in your Network instance. To increase the file size supported for attachments, contact Veeva Support.

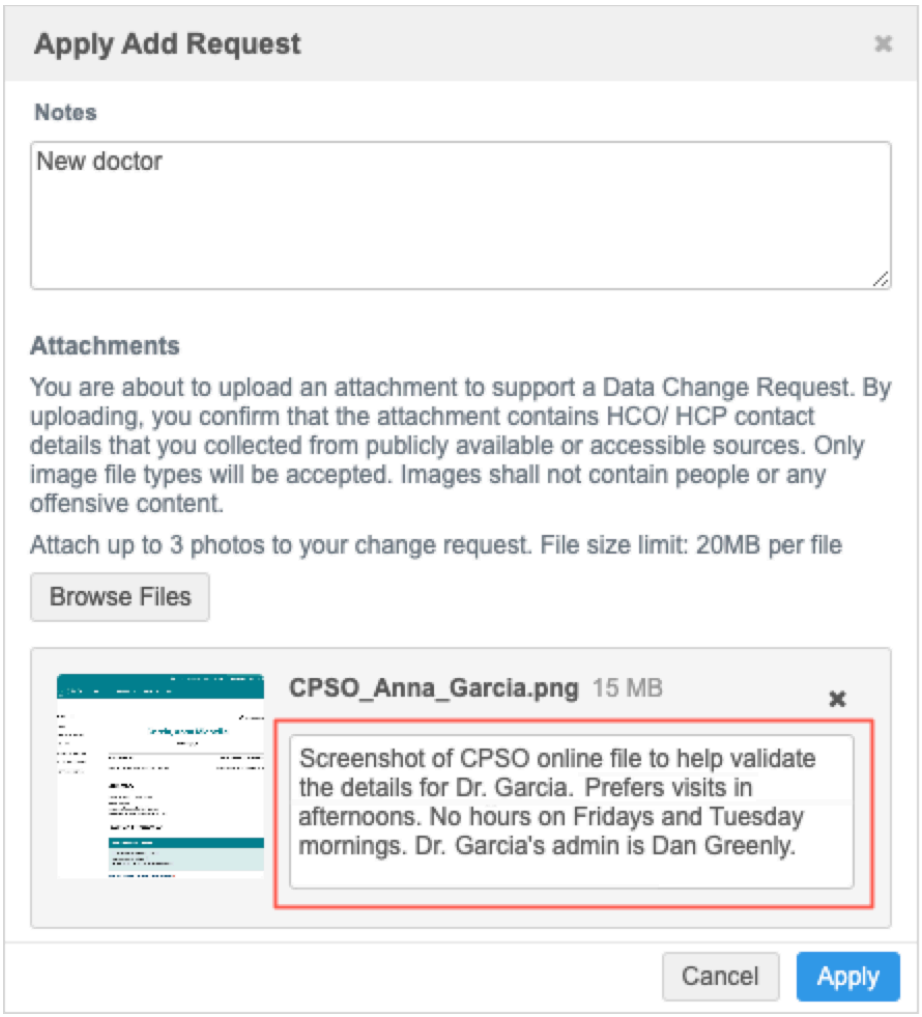
Maximum file size

Images that are included on DCRs can be increased to a maximum of 20MB. By default, the maximum supported image size is 10MB for all Network instances.

To increase the maximum attachment file size for your Network instance, contact Veeva Support.

Image captions

Users can provide supporting details when they include attachments on DCRs. These details display as captions on DCRs. Captions can now support a maximum of 1000 characters so users can include additional details. Previously, the limit was 255 characters.

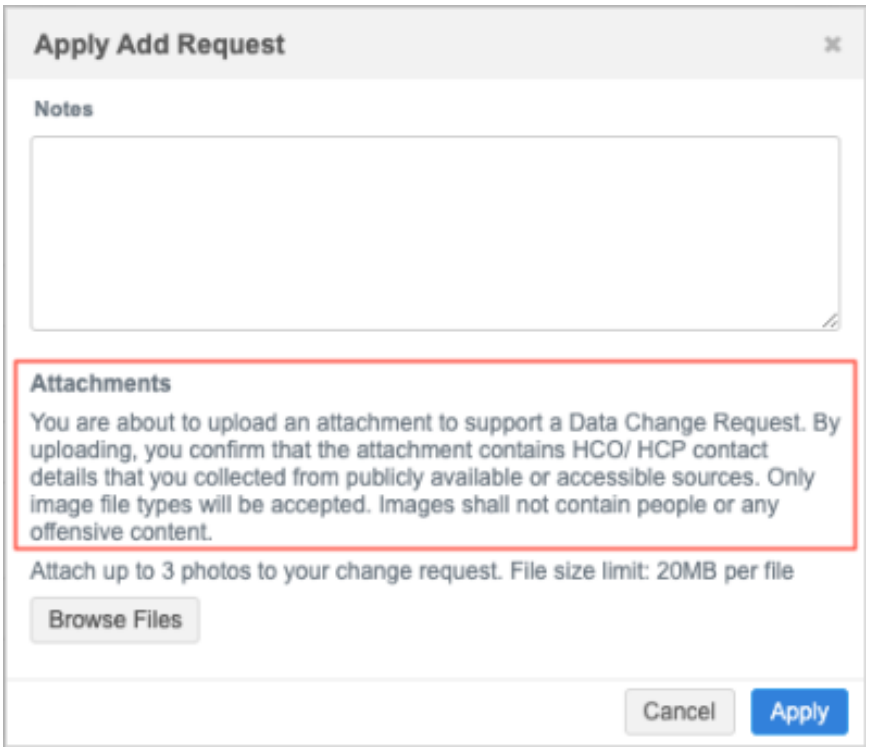


General guidelines for safe DCR attachments

The **Apply Add Request** dialog is updated to include guidance for images that can be attached to DCRs.

Ensure that attachments follow these guidelines:

- Contain contact details from publicly available and accessible sources
- Do not contain pictures of people
- Do not contain offensive content



Support for HEIF image files

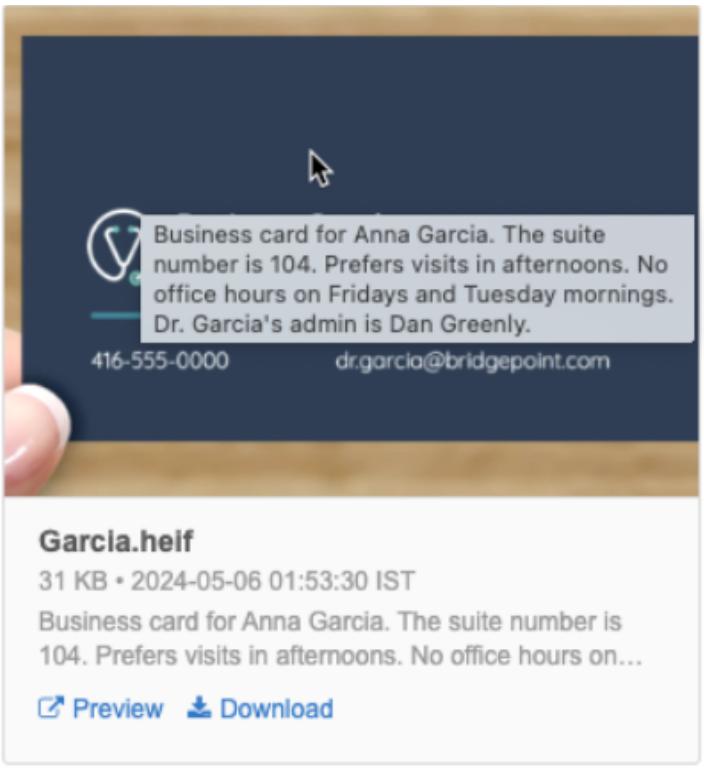
Data Stewards can now preview .heif and .heic files that are a maximum of 8MB when they are processing DCRs on the browser.

Previously, .heif and .hiec image the attachments had to be downloaded from the **Attachments** tab and then viewed in another application.

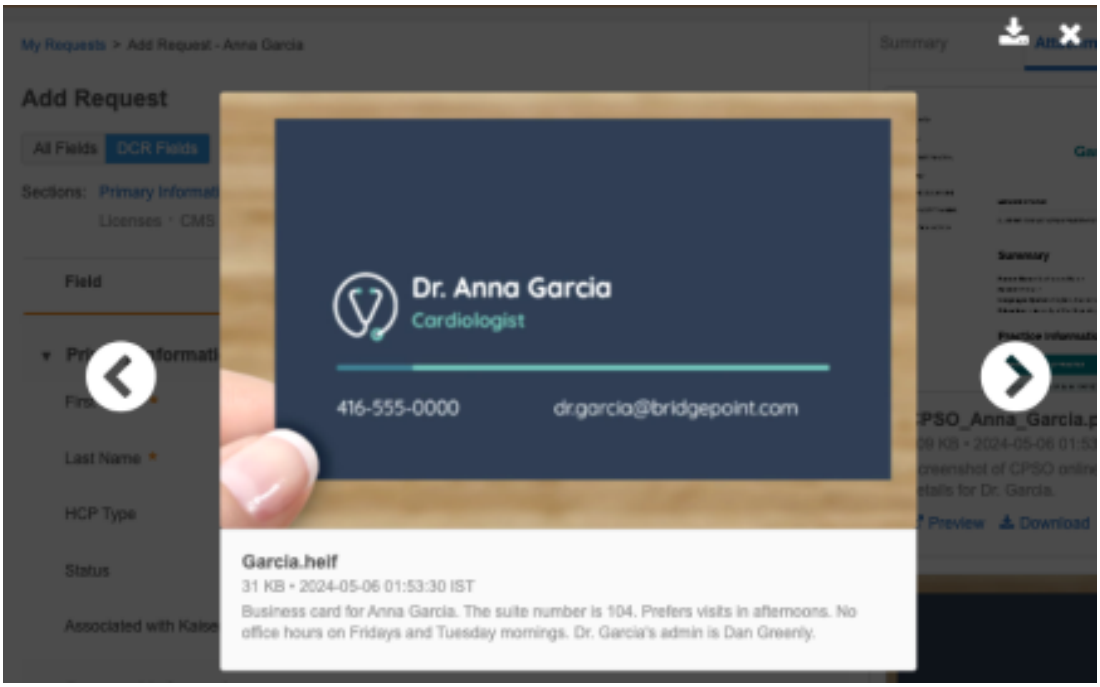
Note: When users attach .heif and .heic files from the Profile page, a thumbnail image does not display

Preview captions and images

When Data Stewards hover over an image on the **Attachments** tab on the DCR, the full image caption now displays.



Data Stewards can now click the image on the **Attachments** tab to quickly open the preview.



The full caption displays on the image preview.

OPENDATA DCRS

Data change requests (DCRs) on Veeva OpenData records are no longer automatically rejected if they contain inactive or custom reference codes.

DCRs are now routed to OpenData data stewards to review. Data Stewards can edit the request and replace the reference code with a code that is active for that OpenData country.

This enhancement is enabled by default in your Network instance.

Data privacy

DATA PRIVACY OPT OUT

Veeva OpenData now manages HCP opt outs for the following 23 countries in the Latin America region:

- Argentina (AR)
- Bahamas (BS)
- Barbados (BB)
- Bermuda (BM)
- Bolivia (BO)
- Cayman Islands (KY)
- Chile (CL)
- Colombia (CO)
- Costa Rica (CR)
- Curacao (CW)
- Dominican Republic (DO)
- Ecuador (EC)
- El Salvador (SV)
- Guatemala (GT)
- Honduras (HN)
- Jamaica (JM)
- Mexico (MX)
- Nicaragua (NI)
- Panama (PA)
- Paraguay (PY)
- Peru (PE)
- Trinidad and Tobago (TT)
- Uruguay (UY)

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

- `data_privacy_opt_out__v`
- `data_privacy_opt_out_date__v`

Records that are opted-out by Veeva OpenData do not display and cannot be accessed in downstream systems. This ensures data privacy for opted-out HCPs to satisfy regional regulatory requirements.

This enhancement is enabled by default in your Network instance.

Opted-out countries

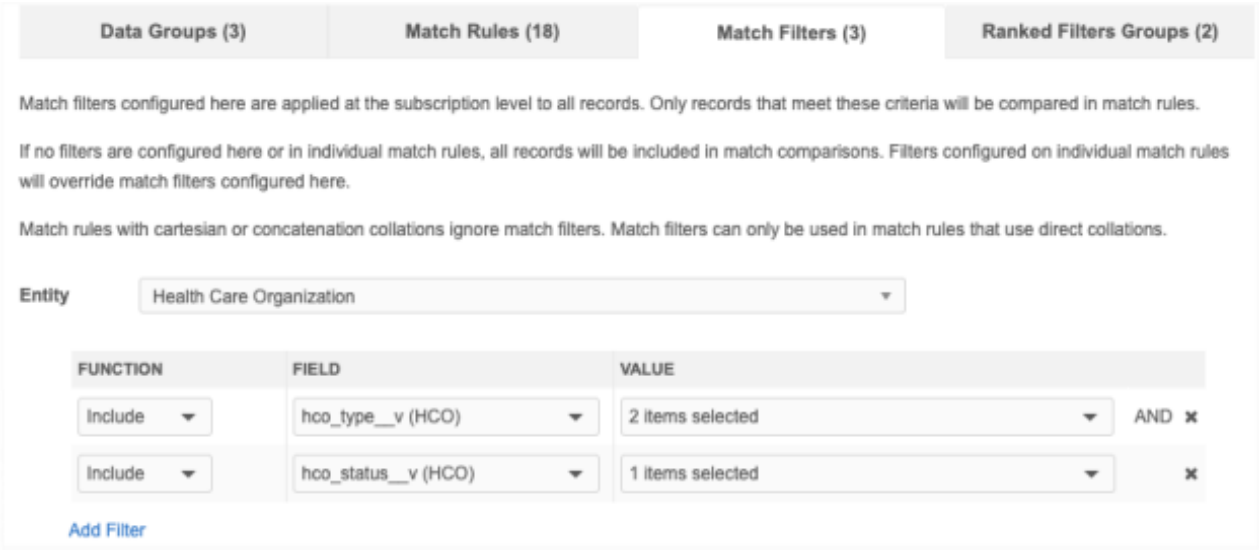
To review the list of opted-out countries, in the Admin console:

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

Match

CONDITIONAL MATCHING ON MATCH RULES

Administrators and Data Managers can create match filters that apply to all match rules in the match configuration. These subscription-level match filters can include or exclude specific records from being considered for match pairs. For example, you can create match filters for HCOs so the subscription match rules apply only to active HCO records that are hospitals.



This feature is enabled by default in your Network instance.

Supported match configurations

Match filters can be applied at the match configuration or subscription-level.

- Default Match Configuration
- Source Subscriptions
- Ad Hoc Match Configuration
- Add Request Match Configuration
- Match Rule Collections
- Data Deduplication data maintenance subscriptions

Available filter methods

There are three types of filters that can be applied on match configurations:

Existing filter types

- **Filters on individual match rules** - Conditions created on a specific rule on the **Match Rules** tab.

  These filters override Match Filters.

- **Ranked filter groups** - A series of conditions that are applied after the typical match process. The conditions are prioritized so they are applied in a specific order to find the highest ranking match pair.

New filter type

- **Match Filters** - Conditions that are applied to all applicable match rules during the match process.

  Create the conditions on the **Match Filters** tab to include or exclude specific records from consideration.

Match Filter highlights

A new tab called **Match Filters** is added to all match configurations. Filters that are created on this tab will apply to all match rules in the configuration for the defined entity and its child objects and country group.

Key details

- Subscription-level filters are applied to the rules on the Match Rules tab.
- Filters apply to the defined entity and country group.
- Filters on individual match rules override filters on the **Match Filters** tab.
- Filters can include or exclude records.
- Filters can be applied to incoming records that do not have a value in a filtered field.

How match filters work

Match filters are applied to the existing match configuration to include or exclude specific records for consideration. ACT and ASK matches are determined based on the resulting record pairs and confidence values.

If filters are applied to individual match rules in the configuration, these subscription-level match filters are ignored when that match rule is processed.

Example use cases

Use subscription-level match filters to immediately include or exclude specific records from consideration during the match process.

- Only match on active HCOs; do not include non-active HCOs.
- Only match on active hospitals; do not include any HCOs that are not active and HCOs that are not hospitals
- Only match on pharmacies; do not include HCOs that are not pharmacies

Create match filters

To create a subscription-level filter to apply to all defined match rules:

1. Open a match configuration and select a country group.
2. Click the **Match Filters** tab.
3. Expand the **Entity** list and choose the object for the match filter.
4. Click **Add Filter**.
5. Expand the **Function** list and choose one of the following:
    - **Include** - Choose to define the records that the match rule will apply to.
    - **Exclude** - Choose to define the records that match rules will not apply to.
6. Choose the **Field** to filter match rules on.

    Supported fields

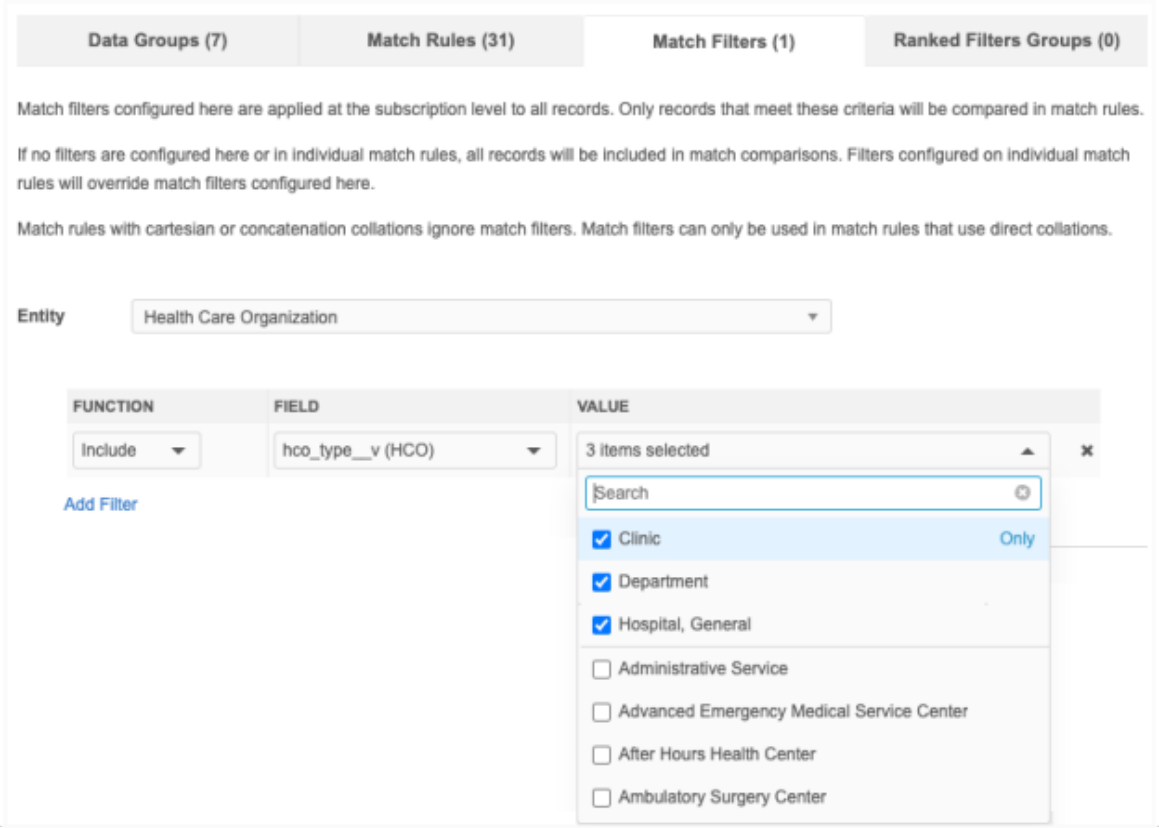
    - Active fields for the selected country and entity type.
    - Reference and text fields
    - Veeva standard fields and custom fields
7. Select the **Value** to filter match rules on. One or more values are supported.

    If you select multiple values for a filter, the match rule considers all values.

    Example

    - **Function**: Include
    - **Field**: HCO Type (hco_type__v)
    - **Values**: Hospital, Department, Clinic

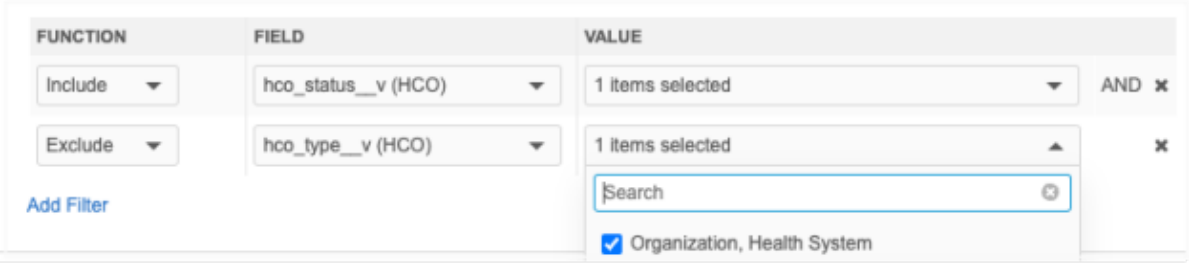
    Result: The match rule considers records that are Hospitals, or Departments, or Clinics.



8. To include another filter, click **Add Filter**.

   When multiple filters are defined, the filters are combined as an AND operation.

   Example



   - Filter 1: Include active HCO records
   - Filter 2 Exclude HCOs that are health systems

   Result: Match rules will consider all active HCOs *and* all HCOs except health systems.

9. **Save** your changes.

The filter will now be applied to all match rules for that entity and country group.

Applying filtered match rules to incoming records

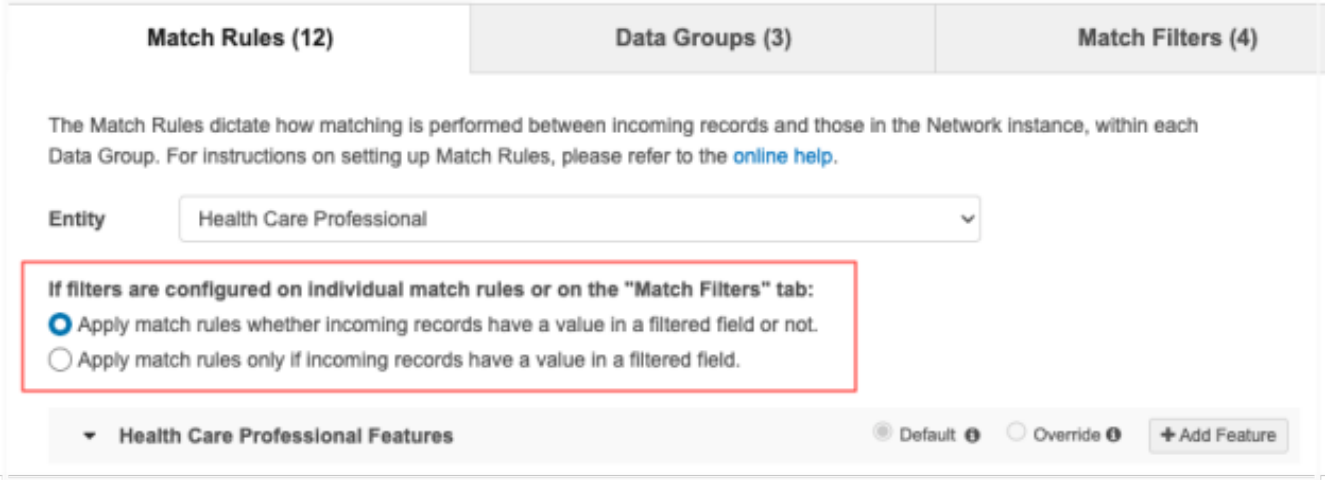
When filters are applied to individual match rules or all match rules, the rules can consider incoming records even if they are missing the field value of the filter.

Previously, for match filters to work, the fields and values on filters had to exist on both the existing data in your Network instance and on the incoming data. Often, the incoming data is not as robust as the data in your instance, so records were skipped if they didn't contain the filtered field and value.

Set record options

The options to allow incoming records with empty values to be considered for match display on the **Match Rules** tab.

It applies to any filters on individual match rules on the Match Rules tab and to filters defined on the Match Filters tab.



- **Apply match rules whether incoming records have a value in a filtered field or not.**

  This is the default option for all new match rules.
- **Apply match rules only if incoming records have a value in a filtered field.**

  This is the default for existing match rules.

To allow incoming records with empty or missing field values to be considered for match rules, select the first option on the **Match Rules** tab.

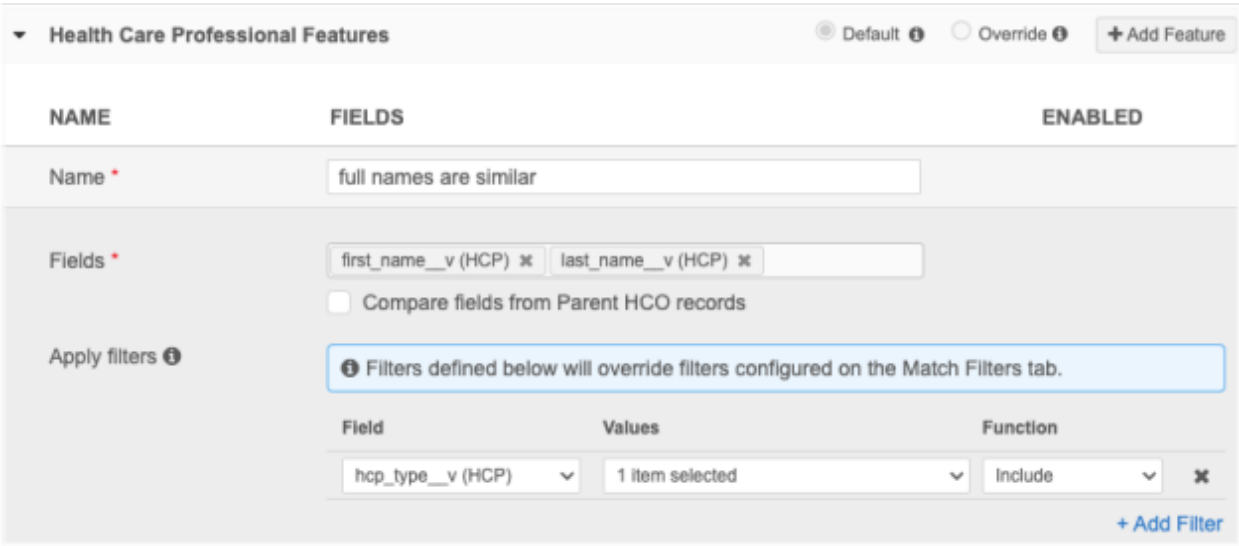
If the incoming data is robust and has values in filtered fields, the second option can be selected.

This is supported when the filter function is **Include**. **Exclude** functions require the records to have the specified field and value.

Filters on individual match rules

Filters on individual match rules override any filters defined at the subscription level (Match Filters, Ranked Group Filters).

On the **Match Rules** tab, a message displays when a filter is added to a rule and if filters are configured on the **Match Filters** tab.



Logging filters

A new column, **Match filters in use**, is added to the Match + Data Group Analysis log to indicate if a match filter was used when the match pair was found.

Rule Name	Features	Advice	Match filters in use	Rank Group	Mode
NPI is identical	NPI is identical	ACT	Yes	Hospital HCO type	Local Network Link
Corporate names are identical	Corporate names are identical	ACT	Yes	Exclude Departments	Local Network Link
Corporate names are similar and addresses match	Corporate names are identical Addresses match	ASK	Yes		Local Network Link

Column values

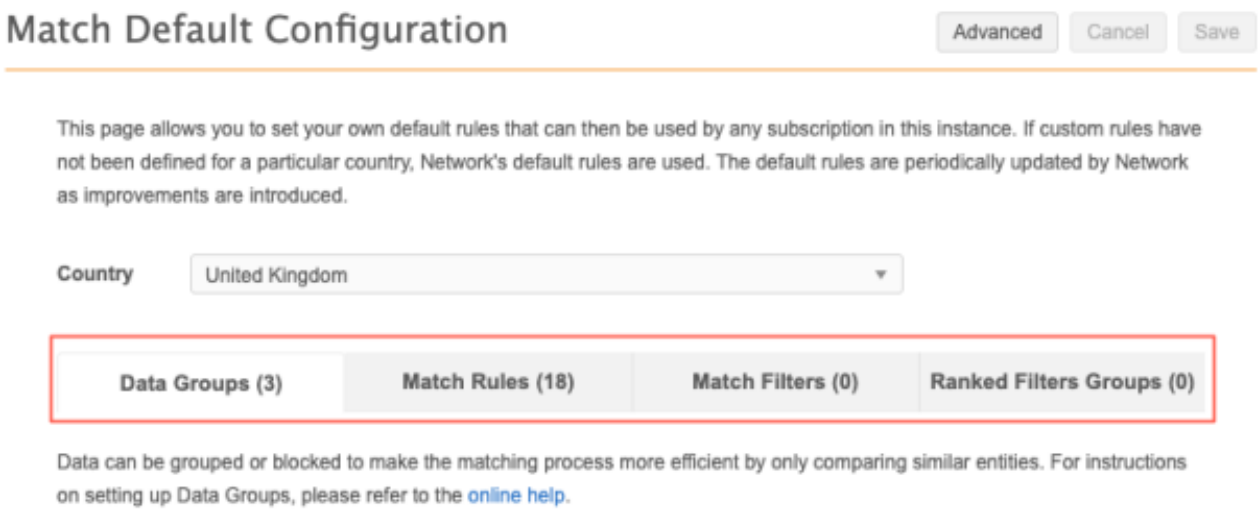
- **Yes** - At least one subscription-level filter is enabled and used.

  Note: Filters are applied to one object. Some matches might be found using rules that aren't filtered. The value will still be **Yes** to indicate that filters were in use.

- **No** - No subscription-level filters exist or were used to find the match pair.

MATCH COUNTS

Match configurations are updated to display a count of items on each tab. The count applies to the country and selected entity. If you change the entity, the count updates to reflect the new entity.



This enhancement is enabled by default in your Network instance.

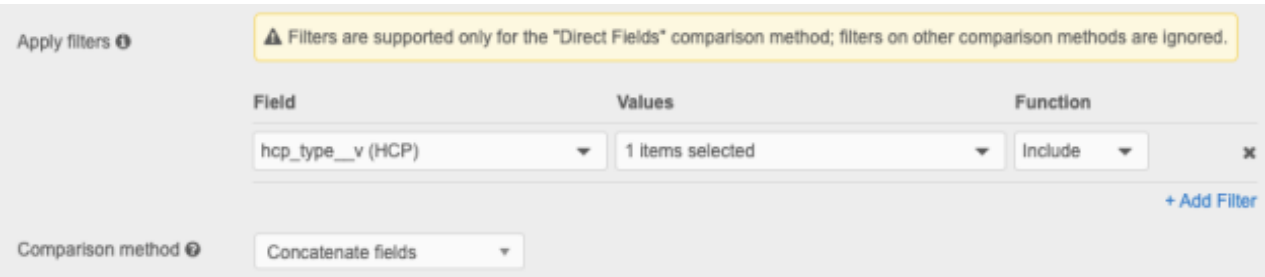
FILTERING INDIVIDUAL MATCH RULES

Filters are supported on individual match rules that use the **Direct Fields** comparison method only. If the match rule uses any other comparison method, the filters are ignored.

This is existing behavior.

A message now displays when a filter is created on a match rule that uses the **Concatenated fields** or **Sets of fields** comparison methods:

```
Filters are supported for the "Direct Fields" comparison method;
filters on other comparison methods are ignored.
```



This enhancement is enabled by default in your Network instance.

Data model

NEW LANGUAGE

Ukrainian (UK) is now supported for reference data.

This enhancement is enabled in your Network instance by default.

Select the language for reference codes

To view reference codes in this language:

1. On the Network menu bar, click **My Profile**.
2. In the **Settings** section, expand the **Language** list and select **Ukrainian**.
3. **Apply** your changes.

Note: Ukrainian is not supported for data model fields and the Network UI.

CLUSTER MANAGEMENT

Updated cluster codes from IQVIA™ are available for the following countries:

- Belgium
- Czech Republic
- Slovakia

The new cluster version for these countries is Version 2.0.

The new cluster version is available by default if you have the IQVIA country/provider combination enabled in your Network instance.

To update addresses with the latest cluster codes:

1. In the Admin console, click **Data Model > Cluster Management**.
2. Select the Belgium / IQVIA cluster configuration.
3. In the **Cluster Management Details** section, expand **Cluster Version** and choose **Version 2**.
4. **Save** your changes.
5. Click **Refresh Addresses** to run a data maintenance job to ensure that all addresses for Belgium have the latest cluster codes.

PRIMARY FIELD CONFIGURATIONS

New primary custom fields are now supported for Unique Checkbox types only. The **Network Calculated** option will be disabled for new primary field configurations for all sub-objects including addresses and parent HCO objects.

Network Calculated primary field logic is available using the Unique Checkbox configurations.

This enhancement is enabled by default in your Network instance.

Benefits of Unique Checkbox fields

Unique Checkbox configurations contain the same functionality as Network Calculated configurations but are more robust and include these added benefits:

- **Supported objects** - Unique Checkbox is supported for all sub-objects and relationship objects.

  Network Calculated was supported for Address and Parent HCO objects only.

- **Multiple primaries** - You can create more than one primary field for each object. This enables you to have one primary per therapeutic area.

  Only one field per object is supported for Network Calculated configuration.

- **Customizations** – Use the standard Network logic to recalculate primary or customize the logic and define for specific conditions.

Allow Network to calculate Unique Checkbox primary fields

The Network Calculated primary configuration was used to ensure that a record always has an active and valid primary defined.

Network Calculated primary behavior

Network would automatically calculate a primary for the following conditions:

- **No primary** - The record does not contain a primary or a primary was removed.
- **Inactive primary** - The current primary is inactive.
- **Invalid or Deleted primary** - The current primary is invalid or deleted.

These options can also be set on the Unique Checkbox primary configuration.

Configure Unique Checkbox as Network Calculated

To set the Network Calculated behavior on the Unique Checkbox configuration, select the following settings:

When to Calculate Primary section:

- **The record DOES NOT HAVE a primary**
- **The status of the primary is INACTIVE**
- **The record state of the primary is INVALID or DELETED**

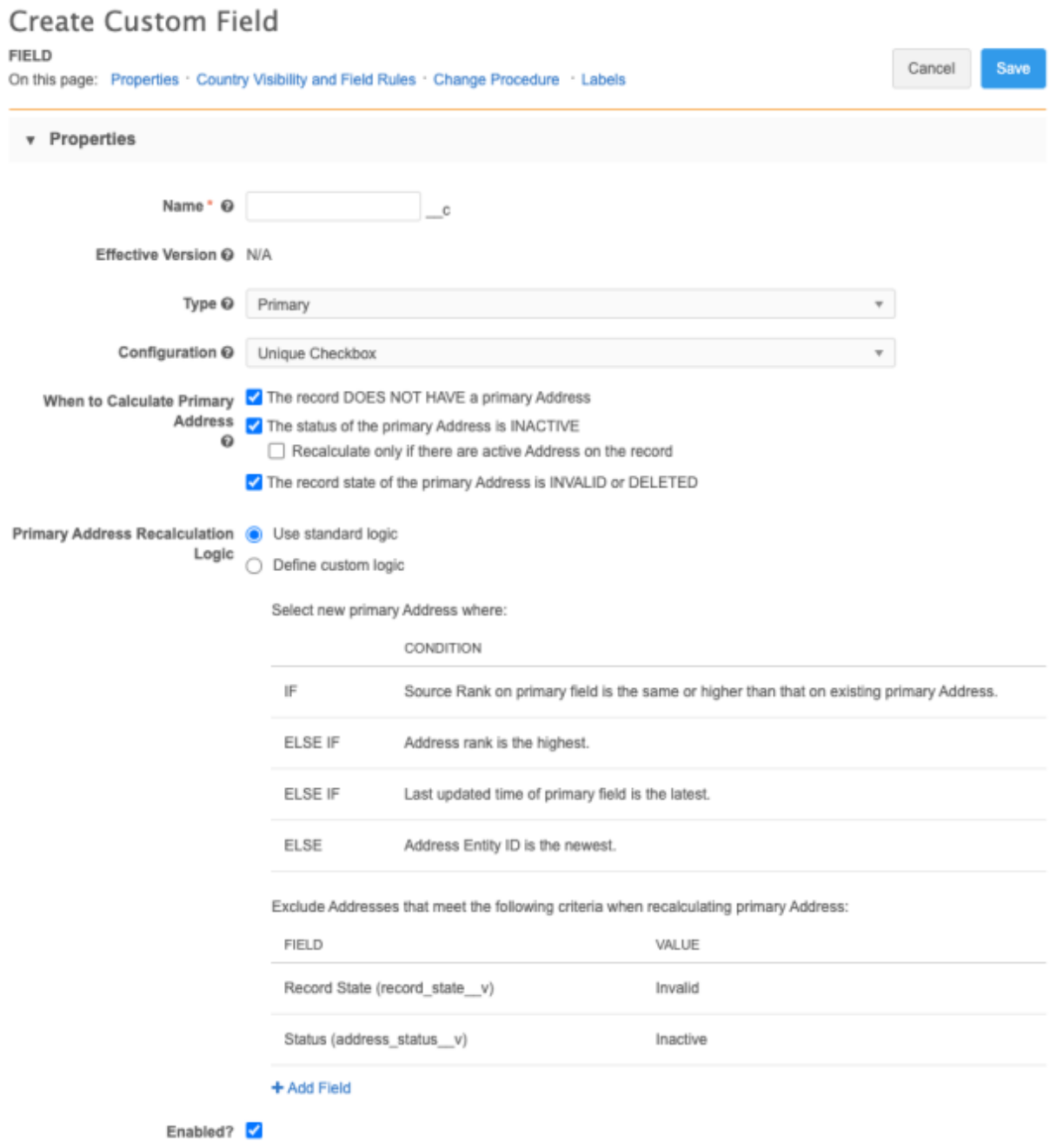
Primary Recalculation Logic:

- **Use standard logic**

These settings will use the same business rules and logic to ensure that records have a primary defined.

For more information, see Create a Unique Checkbox primary in the *Veeva Network Online Help*.

Example Unique Checkbox configuration



Support for existing Network Calculated primary fields

Existing Network Calculated primaries are not impacted by this change. They will continue to work as expected.

You can change an existing Network Calculated configuration to Unique Checkbox by changing the primary type from the Data Model page.

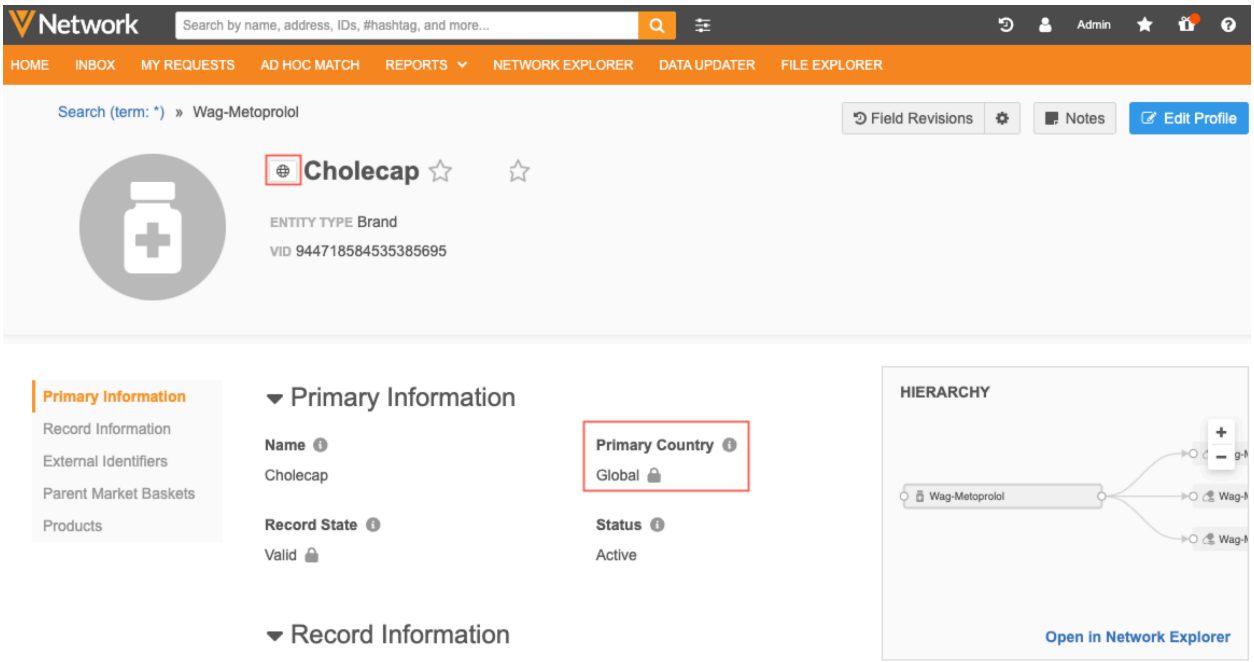
Custom domains

GLOBAL ENTITIES

Administrators and Data Managers can now load and manage top-level entities that do not belong to a specific country.

Some custom objects, like Products and Brands, are not country-specific. For example, Cholecap, is a global brand, but it has country-specific package configurations.

A primary country called `Global` is now available to assign to these entities so you can manage them in Network.



This enhancement is available by default in your Network instance.

Supported objects

Use the Global primary country for custom objects only. Do not use the Global country for Veeva standard objects. HCPs and HCOs depend on country-specific data models.

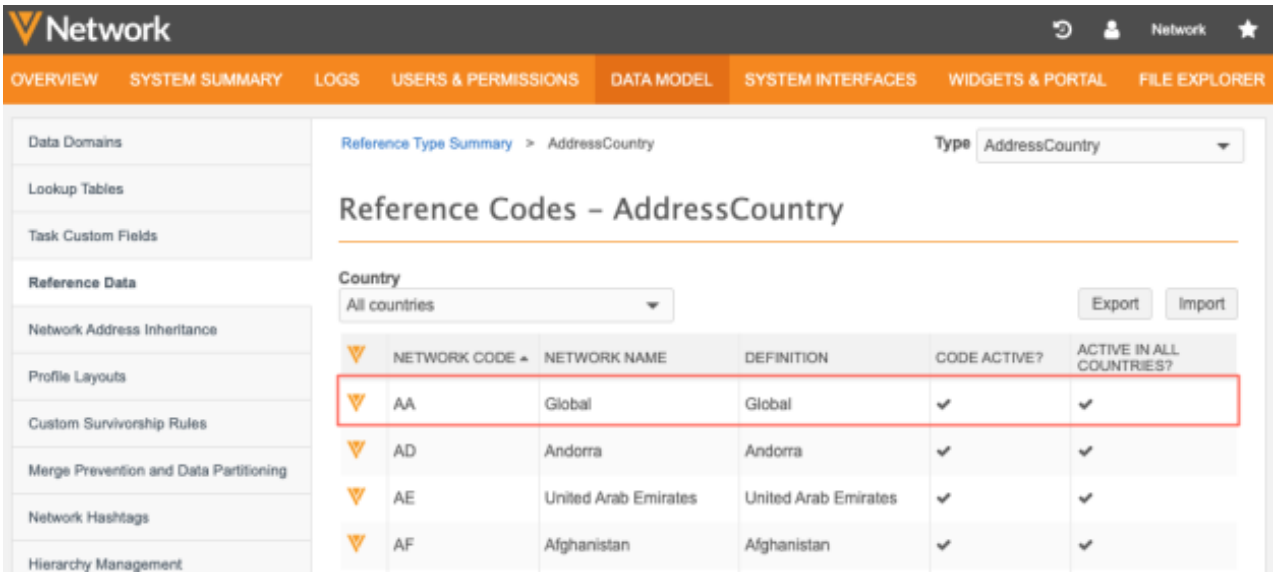
Global country code

All country codes are defined in the `AddressCountry` reference type (**Data Model > Reference Data**).

The **AA** country code definition is now *Global*.

Note: The Global country code represents a "virtual" country to designate entities that do not have a specific country; it does not mean *all* countries.

Use this reference code for custom objects that do not belong to a specific country.



Create a data visibility profile

To view global entities in Network, there must be a data visibility profile assigned to the Global primary country.

Create a data visibility profile (DVP) and then assign it to users that should have permission to view and access these entities.

1. In the Admin console, click **Users > Data Visibility Profile**.
2. Click **Add New Profile**.
3. Type a **Name** and **Description**.
4. Expand the **Country Specification** list and choose **Global**.

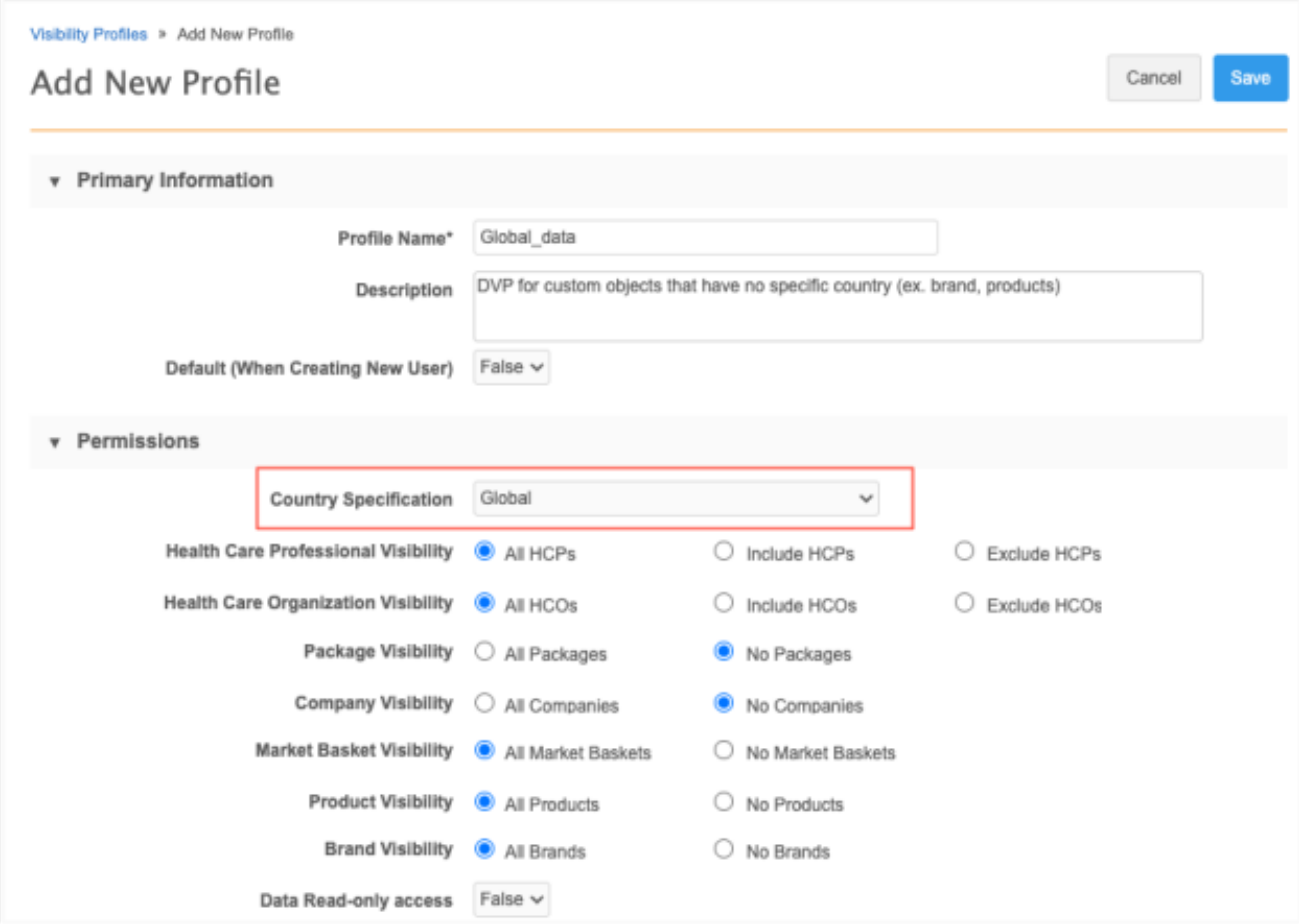
   Important - Global does not mean that users can view records for all countries. It means that users can view the records that use the **AA** country code.

5. For each custom object listed, specify **All** or **No** visibility. Select **All** so users can view records that use the **AA** country code.

   Note: HCP and HCO visibility is **All** by default but a DVP for the Global primary country does not apply to these objects: HCP and HCO records should never use the **AA** country code.

6. Define the additional permissions and assign profile layouts for each object. For more details see Working with data visibility profiles in the *Veeva Network Online Help*.
7. Assign the DVP to any Network user that requires access to the global entities (**Users & Permissions > Users**).

Example DVP

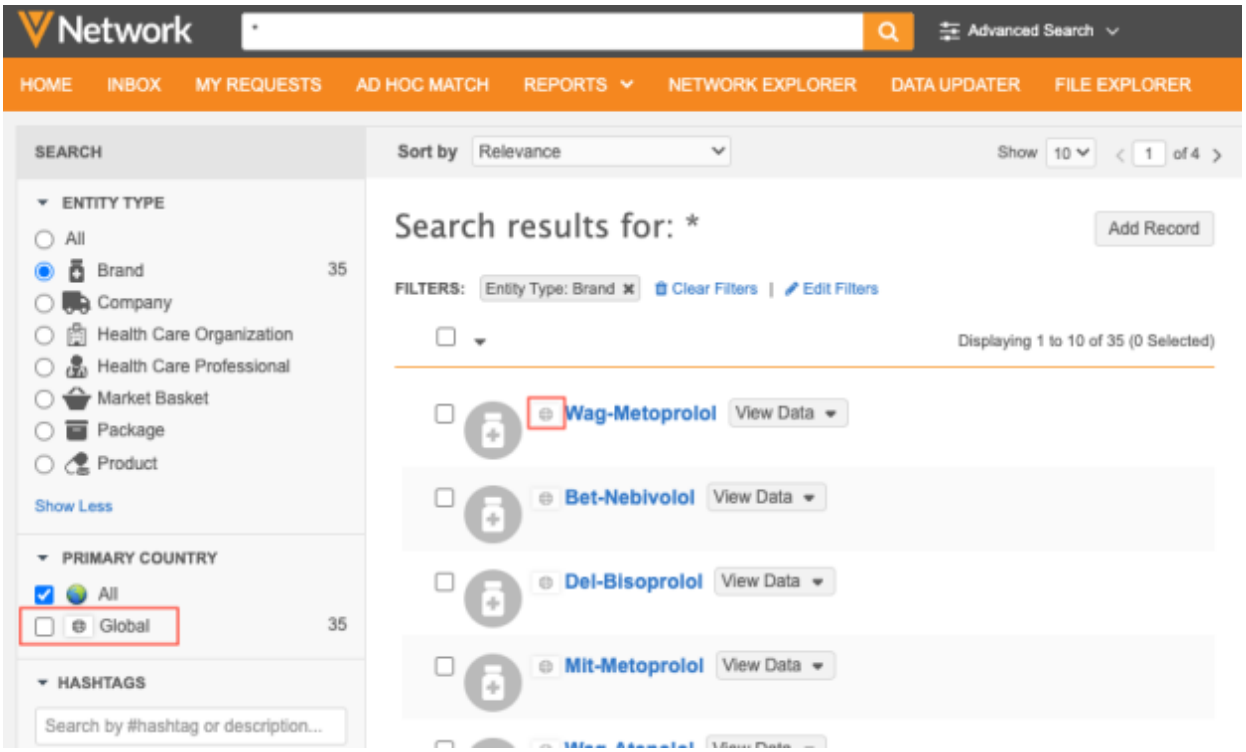


Search for global entities

Users that have access to global entities through the data visibility profile can search for these objects.

The Global country flag displays beside records in the search results.

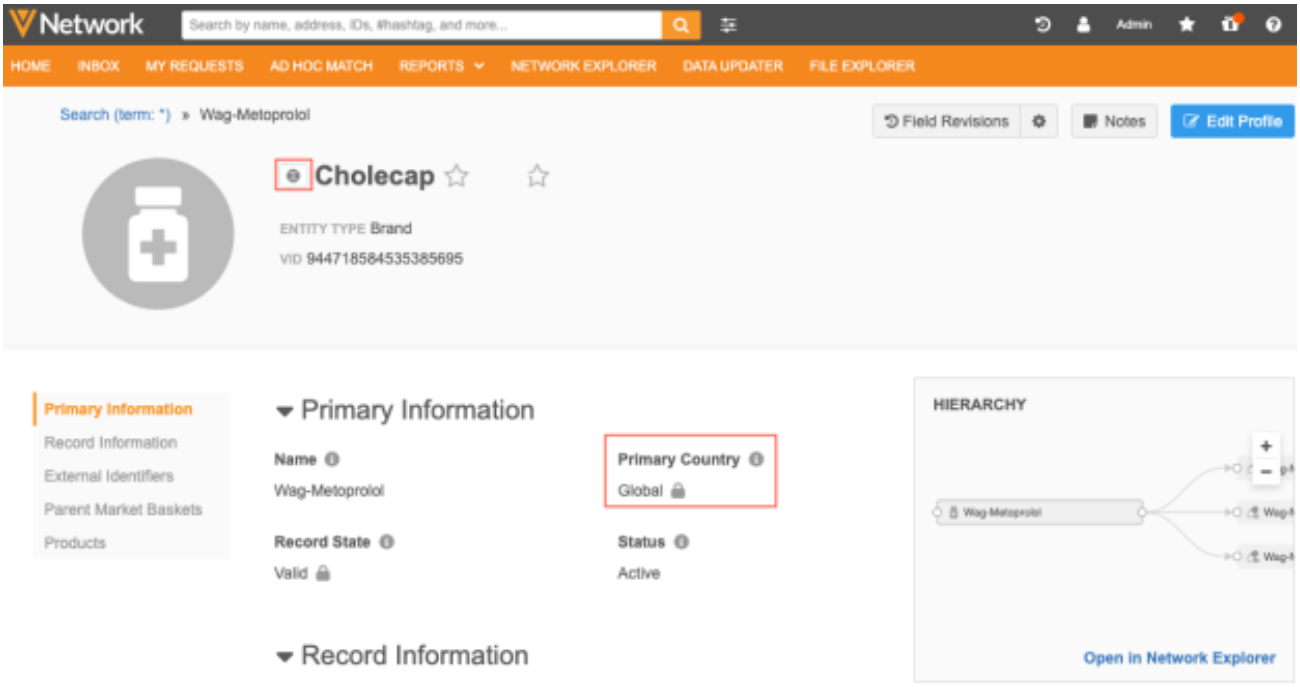
You can also use the **Primary Country** facet to filter the search results for objects with the Global primary country.



Global entity profiles

Records that are loaded into Network using the **AA** country code display the Global country flag beside the object name.

The **Primary Country** field value is **Global**.



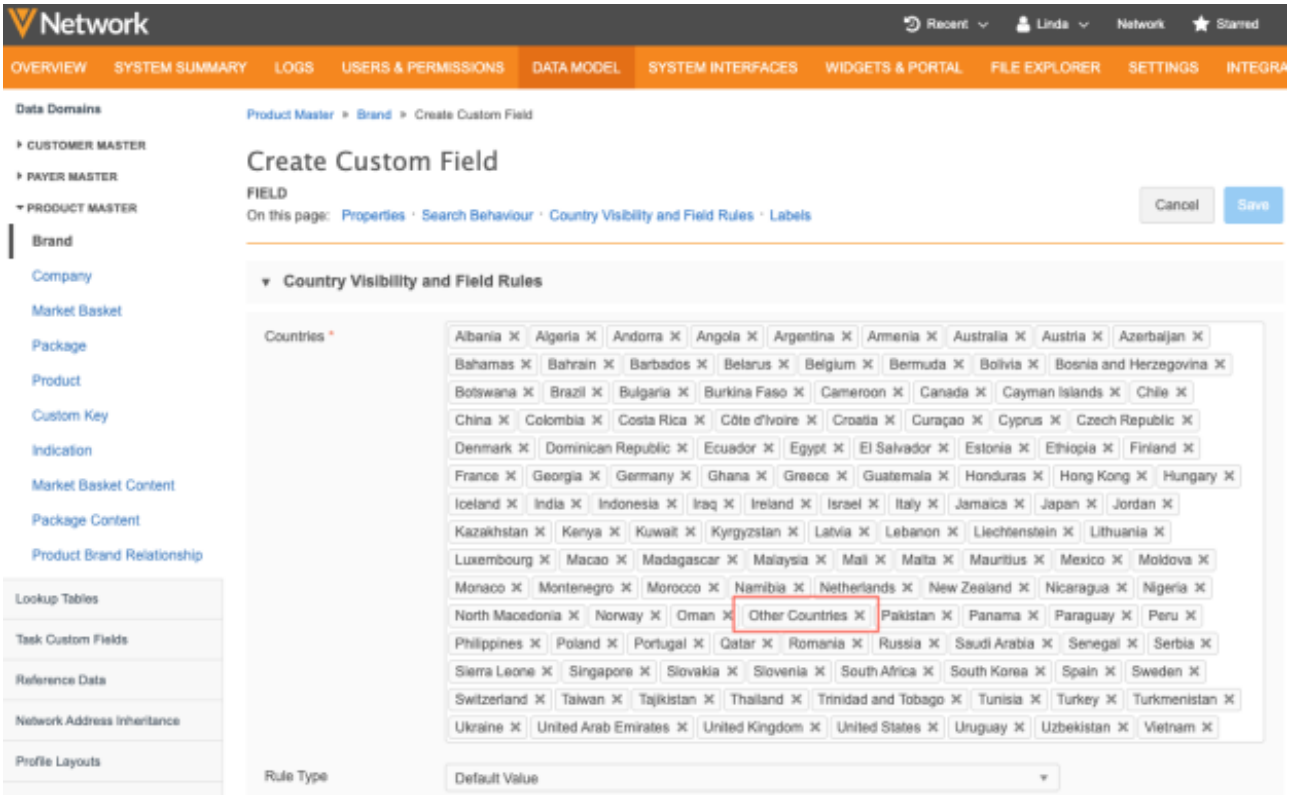
Data model for global entities

The Global primary country uses the Other Countries (ZZ) data model. This data model determines the fields and values that are available to use for global entities in Network.

Custom fields

When you add custom fields to a global entity, the custom field configuration must specify the Other Countries data model.

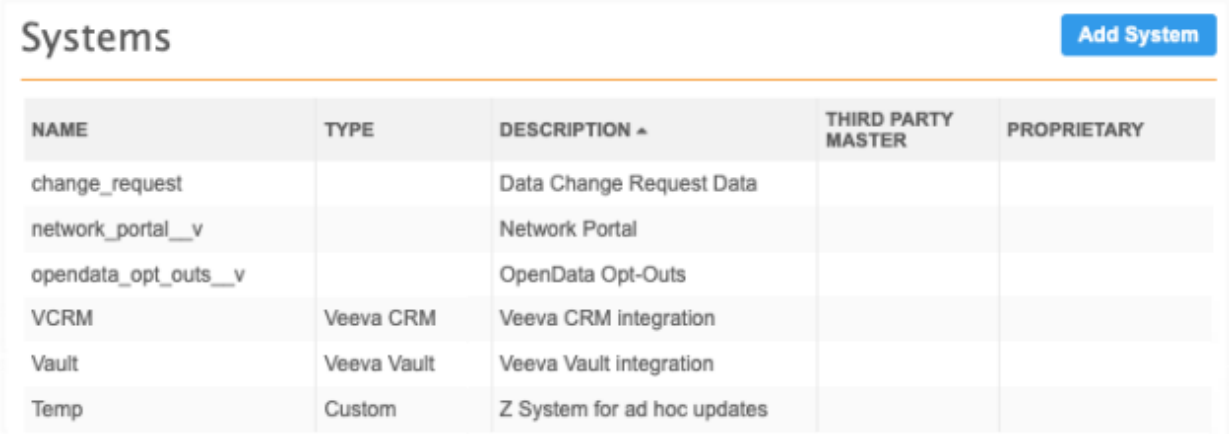
In the **Country Visibility and Field Rules** section, ensure that `Other Countries` is listed.



Systems

VIEWING SYSTEMS

The sort order of systems is now retained for each user on the Systems page. The defined systems can be sorted using any of the columns in the table. If you sort the systems, the order will be preserved the next time you access the page.



Tip: For systems that are rarely or no longer used, assign a "Z" to the description so those systems remain at the bottom of the list.

This enhancement is enabled by default in your Network instance.

Network expressions

NEW OPERATORS

In this release, the following operators are now supported:

- UNION
- UNION (ALL)
- INTERSECT

These functions provide Data Managers with more flexibility to combine and filter data collections, enabling them to tailor data for specific use cases.

This enhancement is enabled by default in your Network instance.

UNION operator

UNION operator is used to combine the result set of two or more collections.

Usage

```
<collection> UNION <collection>
```

Example

```
[ "foo", "star", "ball", "app" ] UNION [ "foo", "bar", "fox", "app" ]
```

Result

```
[foo, star, ball, app, bar, fox]
```

The UNION operator selects only distinct values by default. To allow duplicate values, use UNION ALL.

UNION ALL

Use to combine all result sets of two or more collections.

Usage

```
<collection> UNION ALL <collection>
```

Example

```
[ "foo", "star", "ball", "app" ] UNION ALL [ "foo", "bar", "fox", "app" ]
```

Result

```
[foo, star, ball, app, foo, bar, fox, app]
```

INTERSECT

Use to combine values in the result set that are common to both collections.

Usage

```
<collection> INTERSECT <collection>
```

Example

```
[ "foo", "star", "ball", "app" ] INTERSECT [ "foo", "bar", "fox", "app" ]
```

Result

```
[foo, app]
```

Transformation rules

The following enhancements are added for transformation rules in this release. They are enabled by default in your Network instance.

NETWORK WIDGET SUPPORT

Transformation rules can now be used to transform data that is downloaded from Network widgets. For example, you can use rules to limit type of addresses that display on downloaded records.

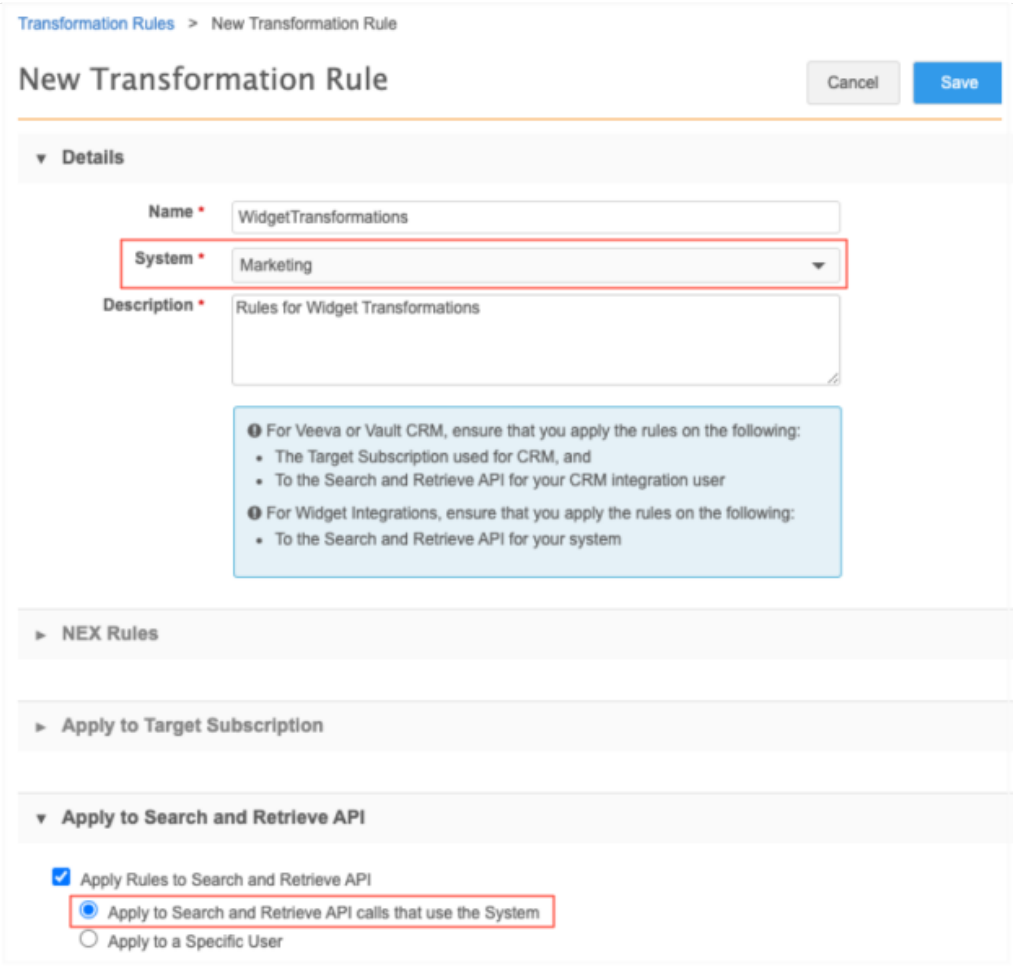
Transformation rules are supported for Search widgets, and the Profile DCR widget.

Note: Transformation rules are not applied to the data displayed in the widget.

Configure transformation rules for widgets

To support Network widgets, transformation rules can be applied to Search and Retrieve API calls for a system. This enables the rules to be applied for any user that uses the widget. Previously, rules could be applied to the API calls for individual integration users only.

This can be specified in the rule configuration.



On the transformation rule configuration, you can apply rules to the Search and Retrieve API calls that use the defined system.

1. Select **Apply to Search and Retrieve API**.
2. Choose **Apply to Search and Retrieve API calls that use the System**.

This will apply the rules to the system defined in the transformation rule configuration.

The system is applied to the API call when widget users download records.

Example widget scenario

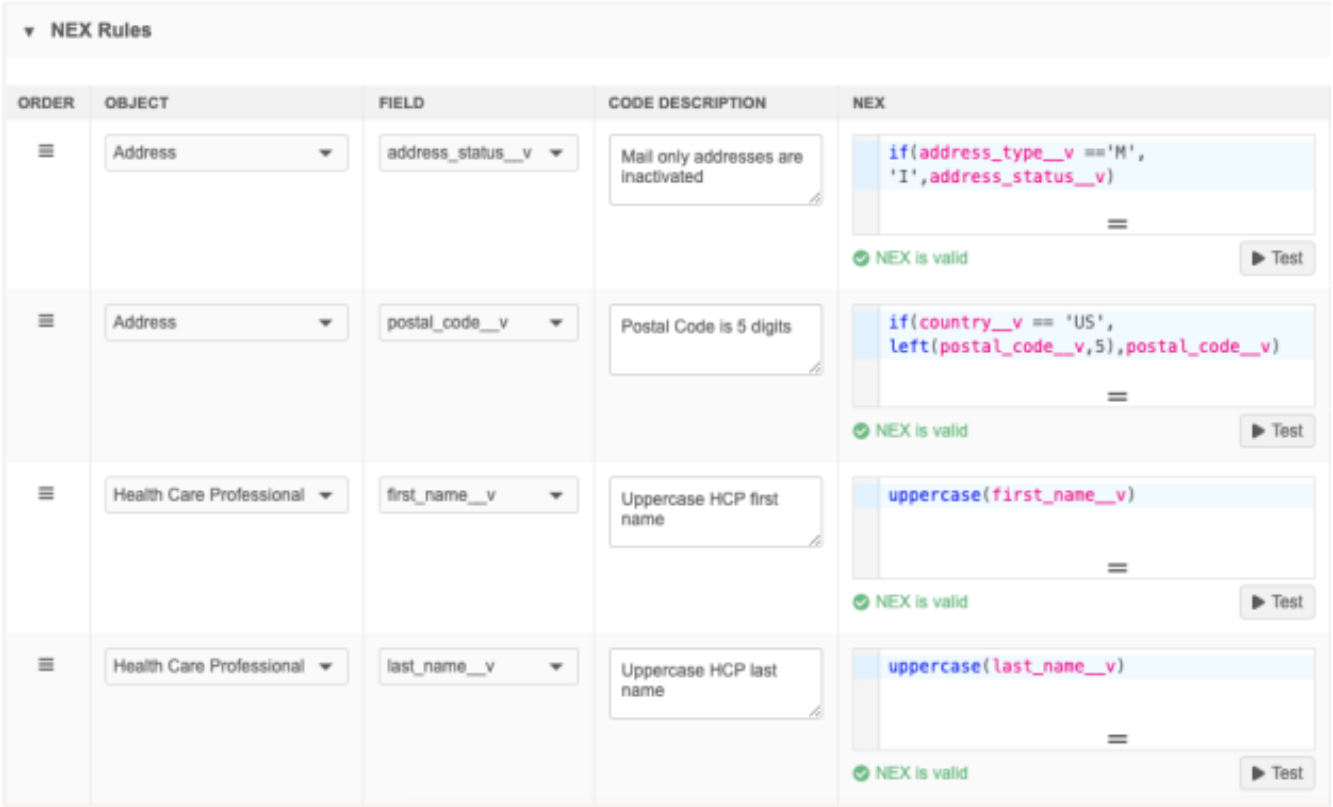
The following transformation rules are applied to the system used for a Search widget.

Address rules

- Set Mail Only address types to Inactive
- Limit postal codes to 5 characters

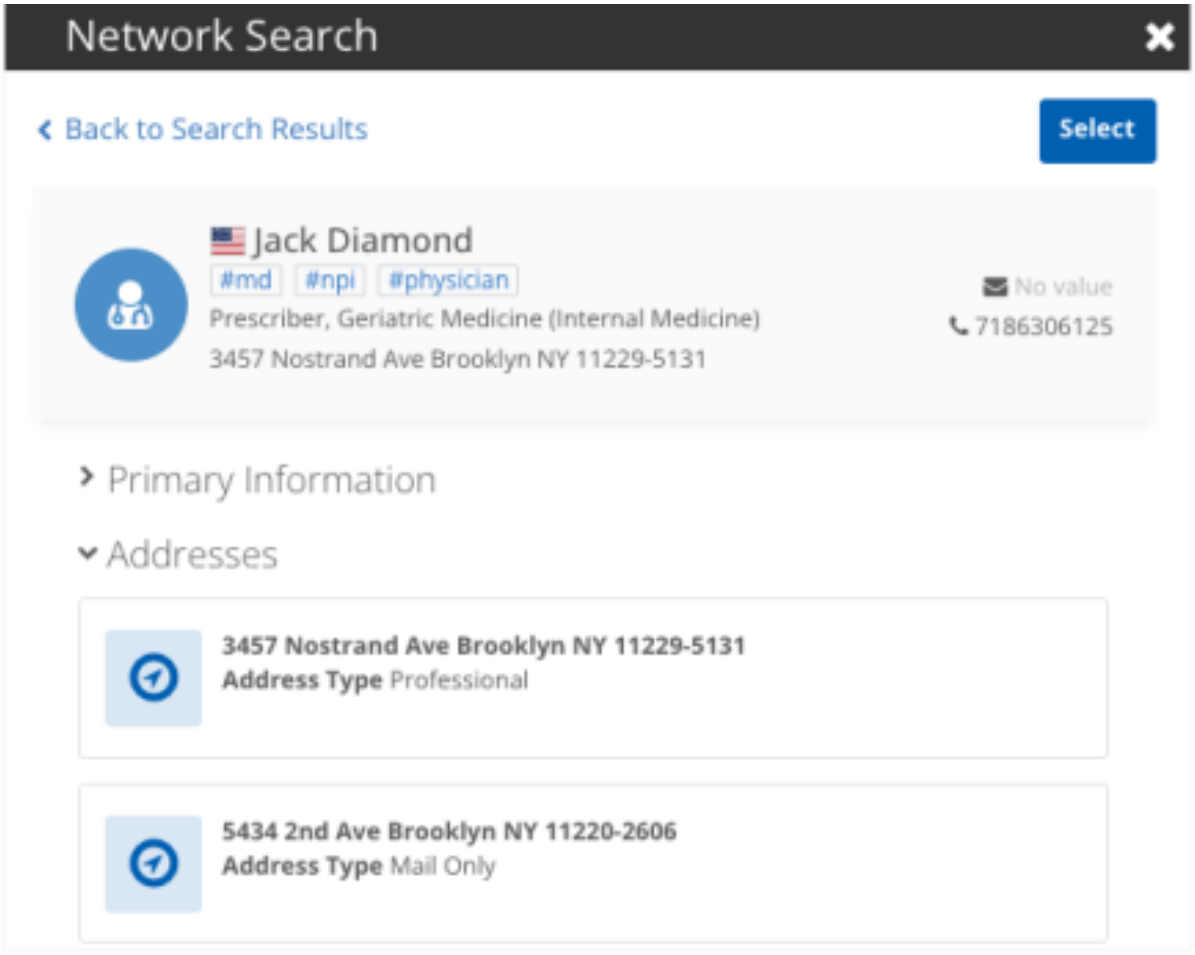
HCP rules

- Uppercase HCP first name
- Uppercase HCP last name



A user searches for an HCP account, Jack Diamond, in the Search widget.

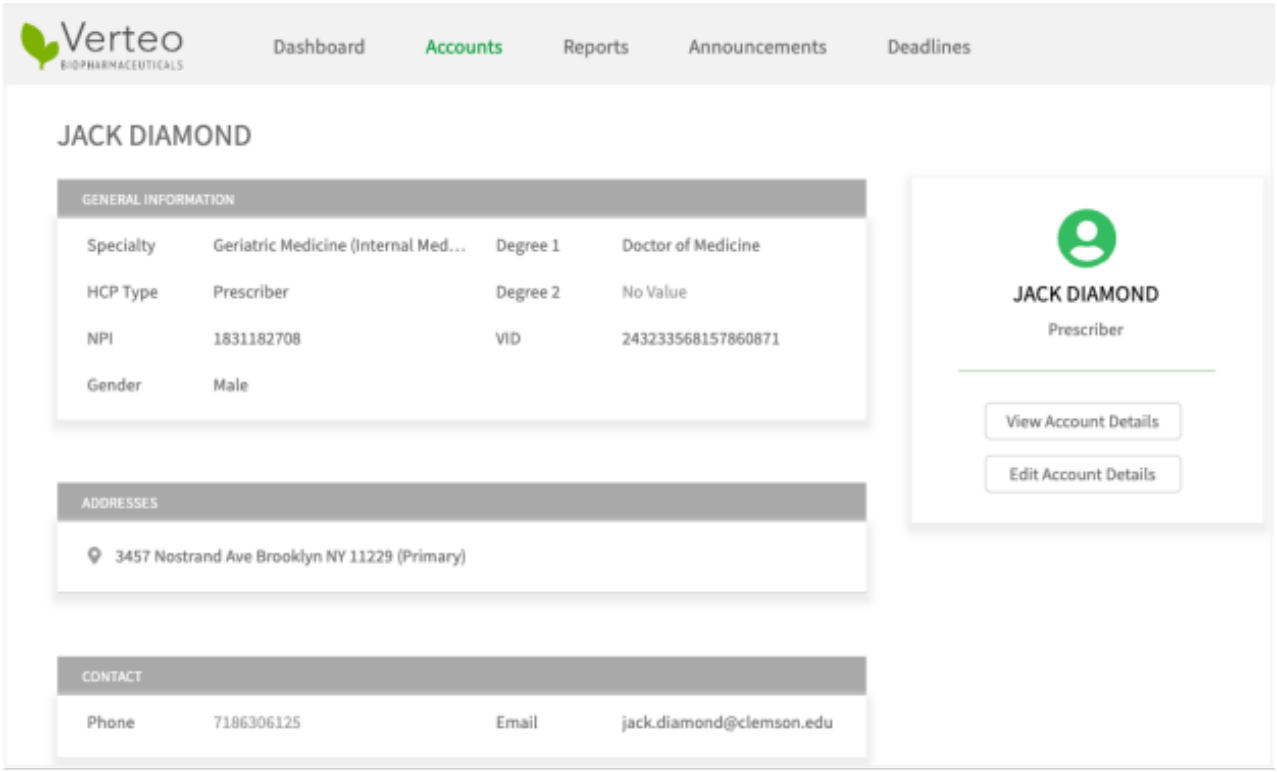
Jack Diamond has two addresses: one Professional address and one Mail Only address.



When the user downloads the record, the data is transformed in the downstream application and in the JSON that is returned.

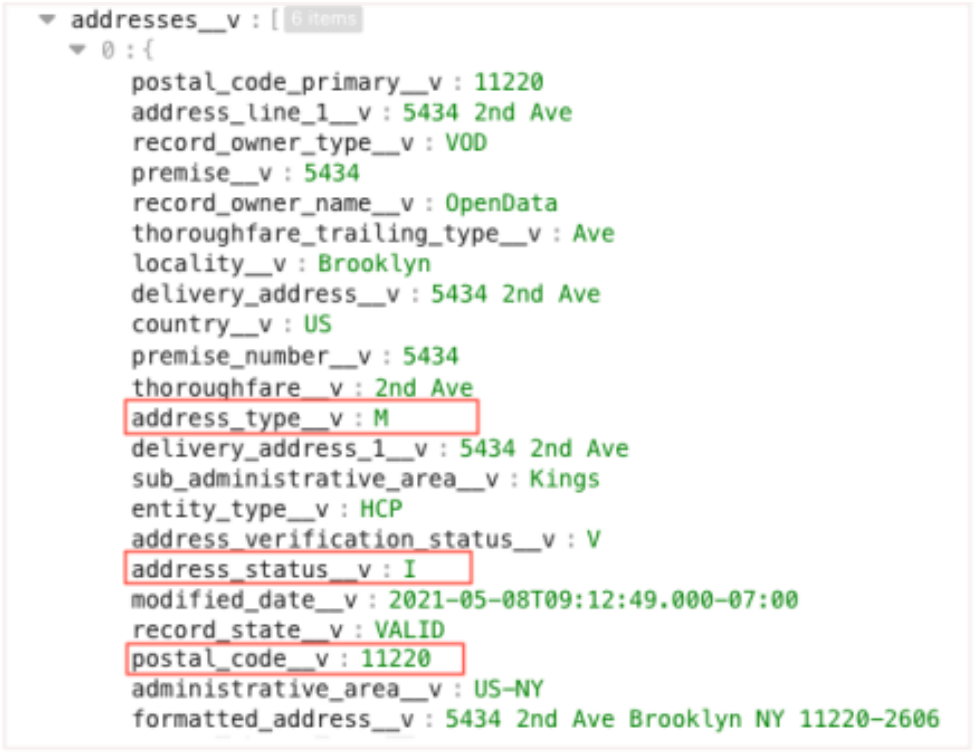
- HCP first and last name is uppercase
- Postal code is limited to 5 characters
- Mail only address is inactive so it does not display to end users

Downstream application



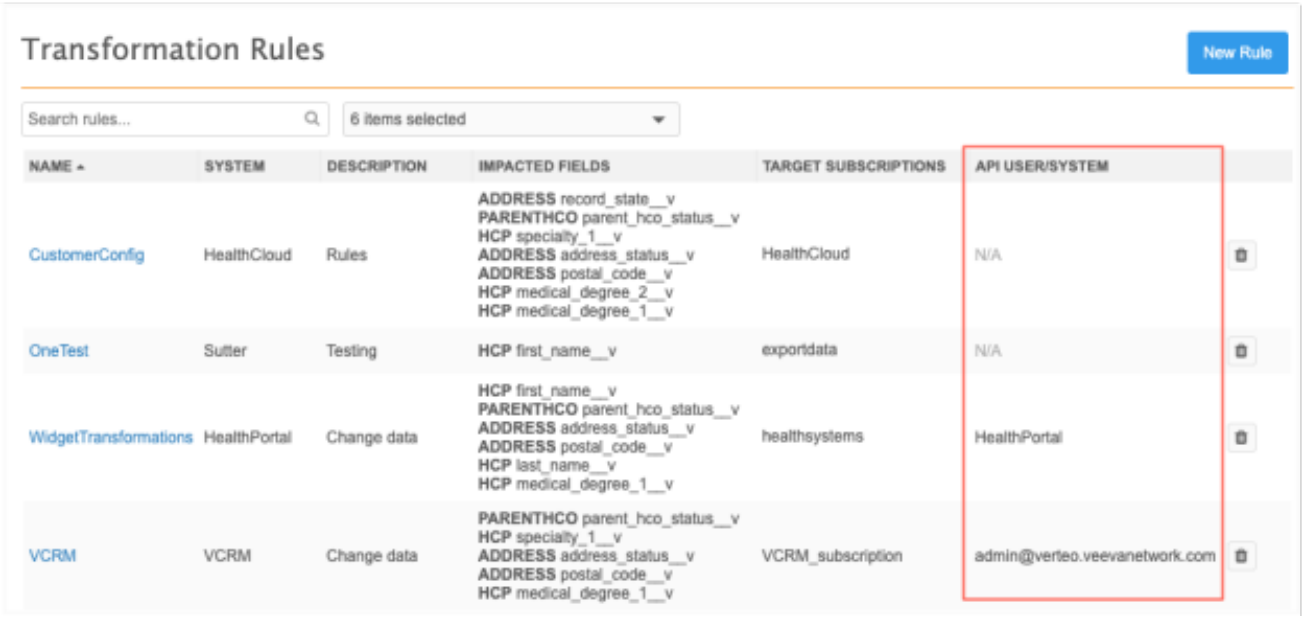
JSON results


```
▼ entity : {
    gender__v : M
    years_in_progress__v : 0
    birth_year__v : 1947
    knipper_id__v : 900256611
    record_owner_type__v : VOD
    first_name__v : JACK
    education_level__v : RESIDENCY
    grad_training__v : Y
    npi_num__v : 1831182708
    specialty_3__v : IM
    record_delta_id__v : 940865729203503103
    record_owner_name__v : OpenData
    grad_trg_end_date__v : 1976-06-30
    place_of_employment__v : 4
    last_name__v : DIAMOND
    formatted_name__v : Jack Diamond
```



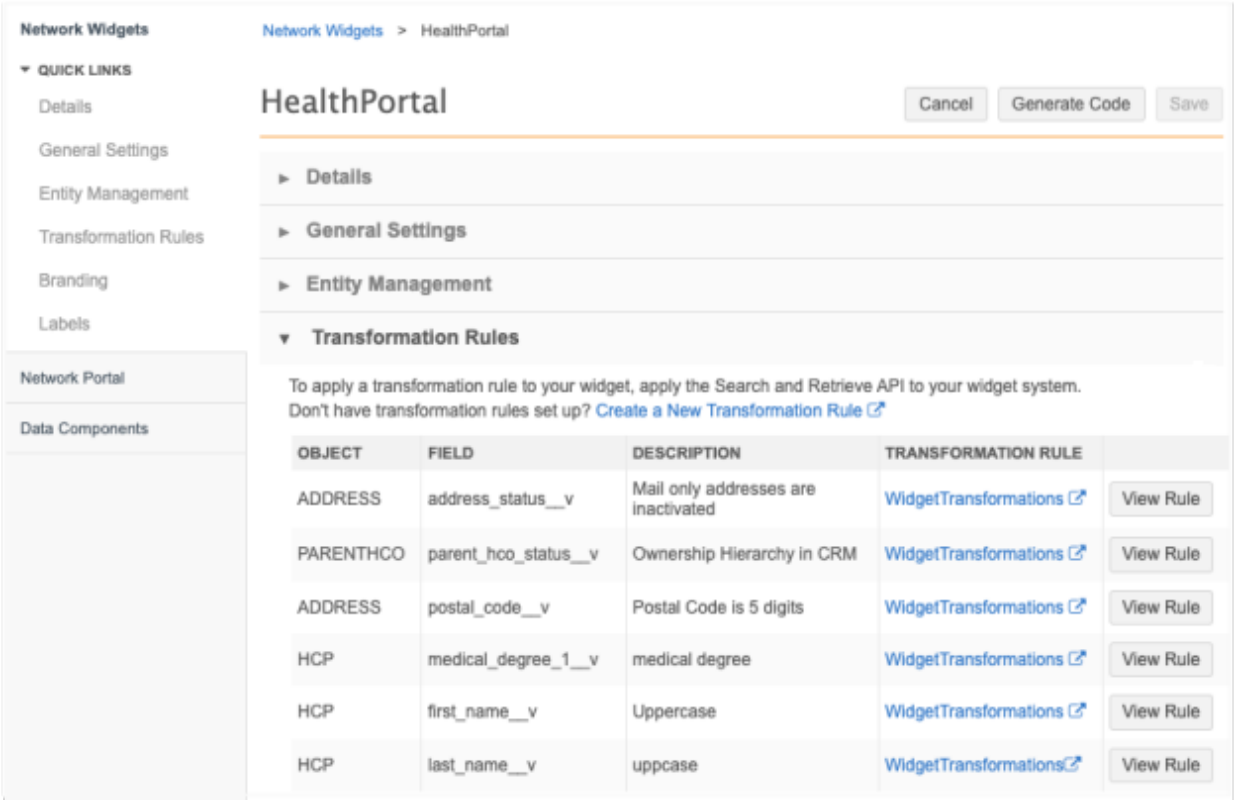
Transformation rules list

The Transformation Rules page is updated to display any systems that are applied to the Search and Retrieve API calls for the rules (**API User/System** column).



Widget configurations

A **Transformation Rules** section is added to Search widget and Profile widget configurations so Administrators can see the rules that are applied. This section is read-only.



Available actions:

- **Create a rule** - Click **Create a New Transformation Rule** to navigate to the Transformation Rules page.
- **Edit a rule** - Click the rule name in the **Transformation Rule** column to open the rule configuration page.
- **View rule** - Click **View Rule** to open a pop-up that displays the object, field, description, and rule name.

NETWORK API

Transformation rules can be applied to the Search and Retrieve calls for your system.

Supported API calls

Example system name = HealthPortal

API	Request
Search API	https://{DNS}/api/version/search?q=john&systemName=HealthPortal
Search API + Supplemental	https://{DNS}/api/version/search?q=john&supplemental={ONE,ALL}&systemName=HealthPortal
Retrieve Entity API	https://{DNS}/api/{version}/entity/{vid_key}?systemName=HealthPortal
Retrieve Child Entity	https://DNS/api/version/child/vid_key?systemName=HealthPortal
Batch Retrieve Entity	https://{DNS}/api/{version}/entities/batch?systemName=HealthPortal
Batch Retrieve Child Entity	https://DNS/api/version/children/batch?systemName=HealthPortal
Retrieve HCO	https://DNS/api/version/hcos/vid_key?systemName=HealthPortal
Retrieve HCP	https://{DNS}/api/{version}/hcps/{vid_key}?systemName=HealthPortal
Retrieve Change Request (IncludeEntity=True)	https://{DNS}/api/{version}/change_requests/{change_request_ids}?systemName=HealthPortal
Batch Retrieve Change Request (IncludeEntity=True)	https://DNS/api/version/change_requests/batch?systemName=HealthPortal

EXPORTING CONFIGURATIONS

Transformation rules can now be included in export packages. Add the rules to export package so you can import them on the target environment.

Dependencies

Most of the rule dependencies are added to the export package. This includes the system, custom fields, and custom objects. Integration users that are specified in the rules cannot be included in the export package.

Target subscriptions

When target subscriptions are added to an export package, any applied transformation rules are also included.

Vault CRM

The following enhancements for the Vault CRM integration are added in this release.

VAULT CRM BRIDGE - OBJECT TYPES

The Vault CRM Bridge now supports updating multiple object types in Vault CRM. Previously, the Vault CRM Bridge supported only one object type for HCOs and HCPs.

This enhancement is enabled by default in your Network instance. Administrators can map the Network fields to the Vault CRM object type.

Configuration requirements

To support multiple object types, map a Network field to the Vault CRM object type field.

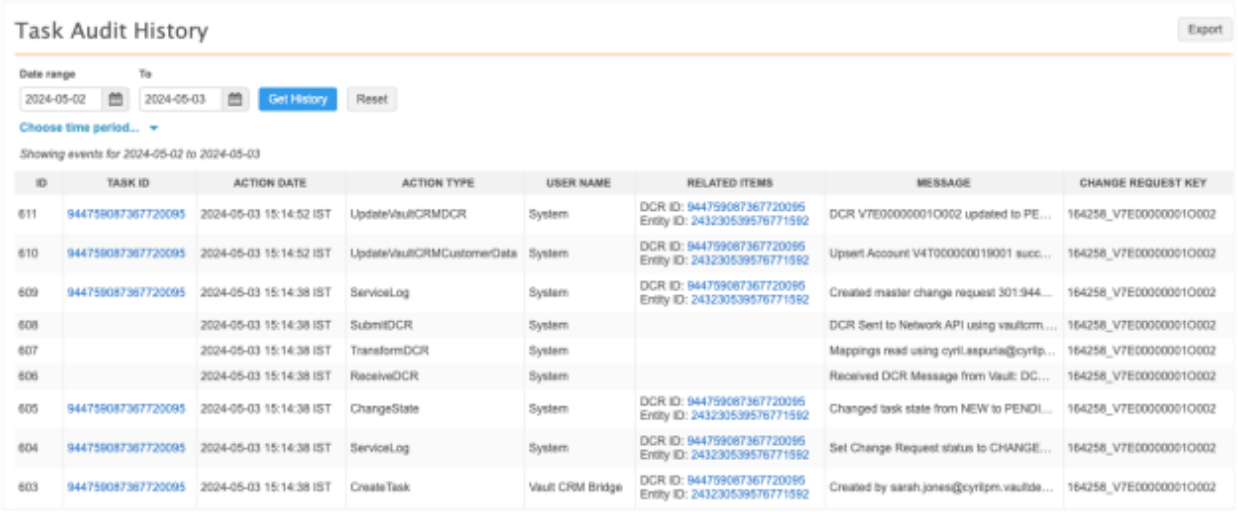
Example mapping

If your Vault CRM has different object types for HCPs, you can map them to Network field values.

Vault Object Type	Network hcp_type__v field value
Prescriber	Prescriber
Prescriber	Resident
Non-Prescriber	Non-Prescribing Health Care Professional
Non-Prescriber	Business Professional
Non-Prescriber	Student

DCR ENHANCEMENTS

Network Administrators can monitor the status of data change request (DCRs) in Vault CRM using the Task Audit History.



This enhancement is enabled by default in your Network instance.

DCR events

All data change request events are logged in the Task Audit History.

An action type is assigned to each event.

Action Type	User Name	Details
CreateTask	VaultCRM	A task was created by <user> in Vault CRM.
ServiceLog	System	A log is generated by Network to indicate a change in the task state.
ChangeState	System	The DCR state was changed.
ReceiveDCR	System	The DCR data was received was Vault CRM.
TransformDCR	System	Mappings were read using <integration user>.
SubmitDCR	System	A DCR was sent to Network API using the Vault CRM Bridge.
UpdateVaultCRMCustomerData	System	The account was upserted to Vault CRM.
UpdateVaultCRMDCR	System	The DCR status was updated in Vault CRM.
Receive Notification	System	A notification of task state change has been resolved.
ResolveTask	System	Task was resolved.
CompleteTask	System	Task was closed.

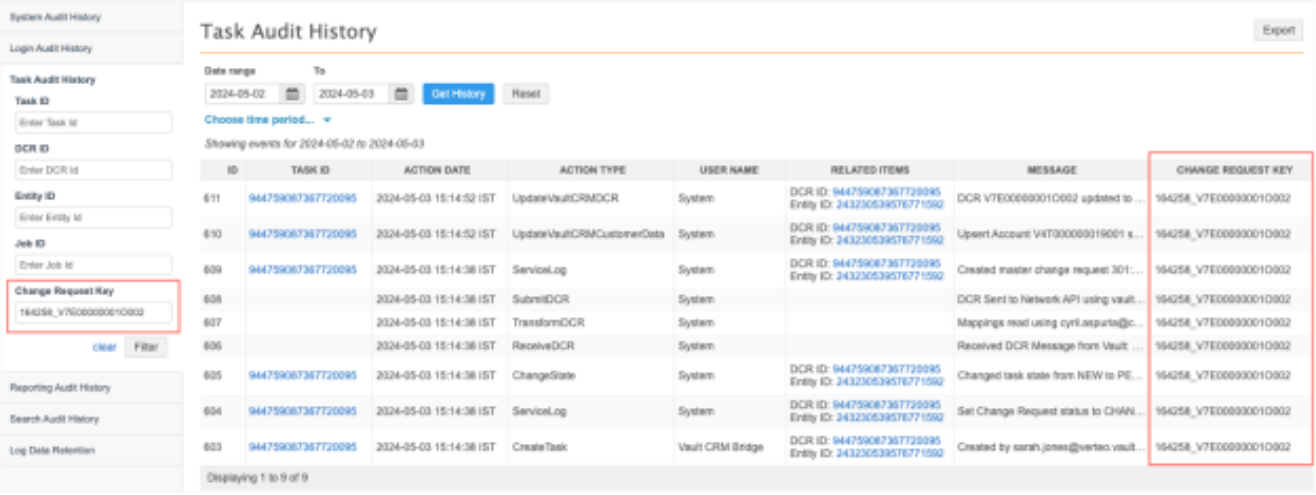
Event errors

Any errors that occur during the DCR process are also logged in the appropriate events. For example, if an account import to Vault CRM fails during the process, the error displays in the `UpdateVaultCRMDCR` event.

Task IDs

The Task ID column is blank when the DCR is first received from Vault CRM.

Change request key

The **Change Request Key** column and **Change Request Key** filter are added to the log. A change request key is the global DCR ID that is assigned to each event.

Add the change request key to the filter to view all events for a DCR.