# Veeva NETWORK

## Contents

## About these Release Notes

These Release Notes describe all features included in Veeva Network 7.0.

## Browser requirements

The following are the minimum browser requirements:

- Internet Explorer 9
- Google Chrome 20+

## Summary

This release includes the following key enhancements:

### REPORTING

The following features are summarized in these Release Notes. For more detailed information, see the *Network Reporting White Paper*.

- **Ad hoc queries –** Query customer master data, change requests, and reference data. Filter on any field in your data model including custom fields and combine filters using AND/OR operators. Includes counts and summaries mode that enables users to quantify and group their query results.
- **Advanced Queries –** System administrators and data managers can construct SQL queries for complex, in-depth analysis.
- **Report viewer –** View report results by bar chart, pie chart, or table and download the full results to a file for offline analysis. Hover actions enable you to view additional information for the report.
- **Data visibility and security –** Restrict access to customer data, change requests, and suspect matches through data visibility profiles and inbox groups.
- **Saved reports –** Save and schedule reports, control access to reports by sharing them for viewing or editing with selected users. Notifications can be enabled so that an email is sent each time a report is run.
- **Simplified query for field sets –** Use single field set names to represent multiple fields in a query.
- **Increased report results limit –** Reports can now return up to 10 million rows.
- **Cancel ad hoc queries –** End an in-progress ad hoc query request.
- **Report list filter  –** Enables quick filtering of the report list.
- **Report email –** Go to the report viewer directly from a report email notification. Report notification emails have been updated for style and layout.
- **Style updates –** Various updates have been made for icons, buttons, and tables styling.

### MATCH

- **Simplified match UI –** Enables administrators to perform match configuration using enhanced match configuration UI.

- **Improved source de-duplication –** More complete match results when source de-duplication is enabled during the match process.
- **Ad hoc match export –** Includes all fields from the global data model, as well as two parent HCO records, where applicable.

## CANDIDATE RECORDS

- **Candidate record creation –** Enables the creation of temporary candidate records on data load for data steward review.

## THIRD-PARTY MASTER

- **Third-party master configuration –** Specify third-party master data sources, change request-enabled fields, and change request routing behavior.

## VEEVA OPENDATA SUBSCRIPTION

- **Veeva OpenData subscription –** Enable and configure the Veeva OpenData subscription, filters, and schedule for each country to which you are subscribed. Previously named Master Subscriptions.

## WORKFLOW

- **Auto-approve settings –** Enables selection of specific entity types for automatic approval, after an add or change request.
- **Review rejection settings –** Enables automatic review of specific entity types after Veeva master steward rejection.

## RECORD PROFILES

- **Enhanced profile page –** Profile page includes summary information at the top of the profile so that essential information is available at a glance.

## NAME FORMATTING

- **Country-specific formatting –** Support for country-specific name formats.

## PRIMARY AFFILIATION

- **Primary affiliation –** Enables selection of a primary affiliation for a record.

## PRIMARY ADDRESS

- **Primary address persistence –** The primary address on the winning record is persisted for the merged record.

## ADDRESS ORDINALS AND SORTING

- **Address sorting –** The sorting process has been updated for addresses. Previously, any address with an ordinal of 99 was not included in any sorting rules so the value of 99 would never be updated. In addition, Veeva OpenData addresses will be sorted using the same rules as are applied to customer-owned addresses (excluding US Veeva OpenData, where ordinals are determined outside of Network).

## ADDRESS CLEANSING

- **Address provider upgrade –** The address cleansing database used by Network has been upgraded.

## SEARCH

- **Search on Veeva ID –** When searching by Veeva ID, Network now navigates the user directly to the profile page.
- **Export from search** – Includes all fields from the global data model, as well as two parent HCO records, where applicable.
- **Search facets –** Search facets now display an approximate count and the exact result when you hover over them.

## OPT-OUT

- **Opt-out visibility –** Enables administrators to hide visibility of opted-out records.

## SINGLE SIGN-ON

- **Country mappings –** Assigns data visibility profiles to automatically created users based on country.

## USER PROFILES

- **Data Manager –** The data manager role includes data steward and some administrator capabilities.
- **Inactive users –** Inactive user profiles are not displayed in drop down lists.

## DATA LOAD

- **Bulk merge –** Merge records in bulk through a source subscription.
- **Invalidate function –** Enables the invalidation of objects under file preparation rules during data loads.
- **Drop function for child objects –** Enables the dropping of child objects under post-merge rules during data loads.

## REFERENCE DATA

- **Reference code descriptions** – Exported reference data now includes descriptions, where specified, for reference codes.

## COMPLIANCE REPORTING

- **US Compliance subscription –** Subscription excludes candidate records and opted-out HCPs.

## GENERAL ENHANCEMENTS

- **Adaptive UI –** The Network UI displays pages optimally for larger resolutions.
- **Email templates –** Network email templates have been updated for style and layout.
- **Recent items –** Displays most recently visited profiles, tasks, or reports from any page.

## LOCALIZATION

- **Brazilian Portuguese –** The Network UI has been localized for Brazilian Portuguese.

- **Other languages –** Network now supports reference data localization for Greek and Russian.

## API

- **US Compliance Target Subscription –** Includes API to create, retrieve, and cancel the US Compliance Target Subscription.
- **External custom keys** – Include external custom key information in responses for Change Request Search, Retrieve Change Request, and Batch Retrieve Change Request APIs.
- **Third-party systems** – The Retrieve Systems Metadata API includes a flag to indicate third-party sources in its response data.
- **Task types** – Include task type and original task type information in responses for Batch Retrieve Change Request, Retrieve Change Request, and Change Request Search APIs.
- **Search filter for third-party sources** – Search API filters non-third party fields out of results for third party data sources.

### DATA GOVERNANCE

Specific updates for fields and reference data are provided in the *Veeva Network Data Governance* release notes.

## Introduction

Veeva Network includes Network Customer Master, and for applicable countries, Veeva OpenData Customer Data.

*Veeva OpenData* provides identity, demographic, and licensure data about Healthcare Professionals and Healthcare Organizations.

*Network Customer Master* is a SaaS Master Data Management (MDM) application that is populated with a subset of the data from Veeva OpenData, according to each pharmaco's contract with Veeva.
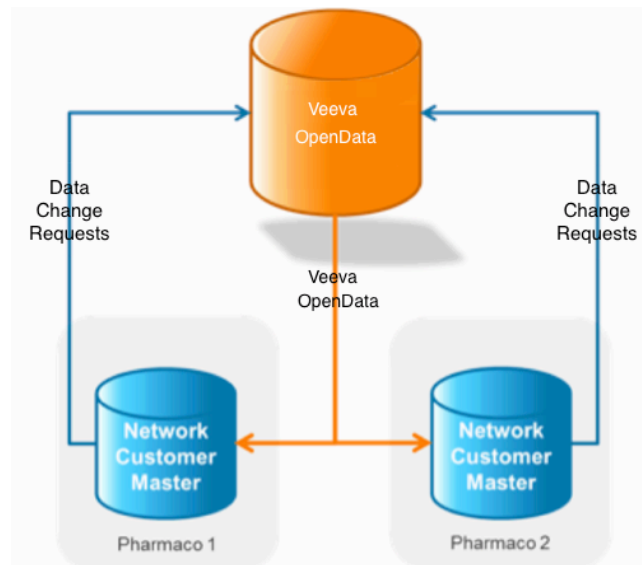


## Network Customer Master

Veeva Network Customer Master is a multi-tenant SaaS Master Data Management (MDM) application. Each pharmaco that subscribes to Veeva Network has its own Network Customer Master tenant (often referred to as a *Network org* similar in concept to a Veeva CRM or Salesforce.com org).

Where Veeva OpenData is enabled, each Network org comes pre-populated with data from the Veeva OpenData databases to which the pharmaco has subscribed. Veeva Network automatically keeps the data in each production Network org up-to-date and in sync with the data in Veeva OpenData.

Pharmacos can also load their own data into their Network org and match and merge it with the Veeva OpenData data. Veeva is responsible for stewarding the quality of the Veeva-provided data as well as any new records added in the Network org that can be shared with Veeva OpenData.

Records that do not match Veeva records will be loaded as customer-stewarded records and updates on those records will not be shared with Veeva OpenData.

## Reporting

In addition to the ability to run and edit predefined reports in Network, Network now provides the ability to create ad hoc queries and save them to the Reports list. Network Reporting provides controls to quickly and easily create queries for analyzing data in your Network org.

Administrators and data managers can also create queries using SQL in the Advanced query editor. This option offers tools for auto completion, as well as easy access to quick lists of available keywords, tables, fields, and operators.

You can use Network Reporting for the following:

- **Analyze data quality issues**; for example, report on HCPs without an active address or those missing a primary specialty.
- **Define a customer dataset** by identifying a subset of Veeva OpenData records for a customer instance; for example, identify all pulmonology-related HCPs and HCOs for a specific region.
- **Perform task reporting and management activities** by identifying and analyzing task throughput; for example, identify day-to-day change request resolution rates by data steward.

The content summarizes some of the key reporting functionality introduced in this release. For detailed information on Network Reporting, refer to *Reporting* in the online help.

### DATA VISIBILITY AND SECURITY

Data visibility and inbox groups play a significant role in controlling the data that can be viewed in report results. To summarize the key points of data visibility:

- Data visibility profiles restrict access to customer data.
- Inbox groups restrict access to change requests and suspect matches.
- Advanced queries can only be used by data managers and administrators.
- Saved reports respect the report creator's permissions:
    - All report viewers see the same information.
    - Viewers and editors are configurable for each saved report.

Standard ad hoc queries are available for all users; data visibility profiles control who can download the results.

## Data type restrictions

Advanced query results are limited by data type restrictions.

| Data Type | Rules |
|---|---|
| HCPs and HCOs | Data visibility profiles – Country, HCP/HCO type. Fields not restricted in Advanced queries. |
| Change requests | Inbox groups – Change request country in one or more inbox groups. Not available to standard users. |
| Suspect matches | Inbox groups – Suspect match country in one or more Inbox groups. Not available to standard users. |
| Reference | Data visibility profiles – Country |

**Note:** As of V7, system administrator and data manager roles are able to view Suspect match and Change request report types, but cannot select them.

The following example shows restrictions by data visibility profile. Note that users running advanced queries can access any field records that they have permission to access.

| DCR for | US Standard User | CN Standard User |
|---|---|---|
| US HCPs | | 🔓 |
| US HCOs | | 🔓 |
| US HCOs, Contract Org Type | 🔓 | 🔓 |
| CN HCPs | 🔓 | |
| CN HCOs | 🔓 | |

The following example shows restrictions by inbox group for change requests and suspect matches:

| Change request for | US Standard User | US Data Steward | CN Standard User |
|---|---|---|---|
| US HCPs | 🔓 | | 🔓 |
| US HCOs | 🔓 | | 🔓 |
| CN HCPs | 🔓 | 🔓 | |
| CN HCOs | 🔓 | 🔓 | |

## Saved reports

Saved reports are run with the role and permissions of the report creator; the creator controls who can view or edit the report. If another user edits the report definition, the report will run with the editor's permissions from thereon in. By default, reports are only visible to the creator. Regardless of permissions, all editors and viewers see the same report results.

## Auditing

All ad hoc queries and reports are included in Network auditing. Administrators can access the audit logs from the admin console in **Logs > Reporting Audit History**.

When users download reports, that action is logged in the system audit history along with the number of records downloaded.



### CREATING AD HOC QUERIES

Network provides two ways for administrators to create queries within Reports: Using standard or advanced query options. Data stewards and standard users can create queries using the standard method only.

## Ad hoc queries

The standard method of creating an ad hoc query, available to all users, enables you to use controls to select entities you want to query, apply filters, and specify sort criteria for the query. Using this method, you can build queries on entities, change requests, suspect matches, and reference data. You can also create reports that quantify query results.

You create standard ad hoc queries under **REPORTS > Ad Hoc Queries**. The **Record Details** tab enables you to query detailed information on records based on the criteria and filters you provide.

You create queries for counts and summaries under **REPORTS > Ad Hoc Queries**, under the **Counts & Summaries** tab. This option enables you to quantify your data and then chart the results.

## Advanced mode

Advanced Query mode enables administrators and data managers to run SQL queries directly in an editor. This editor provides functionality to find and auto complete keywords, tables, fields, reference data, and operators. As you construct your query, the editor automatically validates it, indicated by an icon in the lower left corner of the editor. After you construct your query, you can preview it and save it as a report.

You cannot perform any operations that impact data, such as DELETE, ALTER, or UPDATE. The syntax of Advanced Query mode is based on PostgreSQL 8.0.

You create advanced queries under **REPORTS > Ad Hoc Queries**, under the **Advanced** tab. This option enables you construct and validate SQL, and chart the results

**Note:** Performing a SELECT * in an advanced query will only return fields that are enabled in the user's profile layout.

### SIMPLIFIED QUERY ACROSS FIELD SETS

In basic ad hoc queries, you can select a single field to represent all fields in a set by selecting it in the **Field** drop down list in the **Filters** section for the query. Each field set includes an item in the list prefixed by "All" to represent all fields in the set; for example, **All Specialties**, **All Emails**, and so on.



In Advanced queries, you can specify a single field to represent fields that include multiple field sets such as specialties (for example, specialty_1__v, specialty_2__v, and so on), degrees, credentials, phone, or email.

When you specify a single field, for example, specialties, the results will include values from all fields in the set.

```
select specialties
from hcp
where specialties in ('FM')
```

This example will return results that include FM (Family Medicine) in any field in the set (that is, from specialty_1__v, specialty_2__v, through specialty_10__v).

You can use the following field set names to represent multiple fields:

| Object | Valid field set names |
|--------|----------------------|
| HCP | credentials |
| | emails |
| | focus_area |
| | medical_degrees |
| | phones |
| | specialties |
| | URLs |
| HCO | alternate_names |
| | emails |
| | faxes |
| | focus_areas |

| Object | Valid field set names |
|--------|----------------------|
| | phones |
| | specialties |
| | urls |
| Address | address_lines |
| | delivery_address_lines |
| | faxes |
| | phones |
| ParentHCO | emails |
| | faxes |
| | phones |

## ABOUT QUERY RESULTS

Note that where query results include objects such as an address, license, or parent HCO, the object used in the results is dependent on the best result that meets the filter criteria.

The result is based on attributes such as the status of the object, its ordinal, the best state license (for the license object), primary affiliation (for parent HCO), primary address, and so on.

For example, an active object is used over an inactive object, or a primary address would be used over other existing addresses for the entity.

### Result limits

Reports have no row limit. Previously, report results were limited to 1 million rows. The file limit is still 100Mb.

## CANCEL A QUERY

You can cancel an ad hoc query in progress by clicking the **x** at the top right of the report status message.
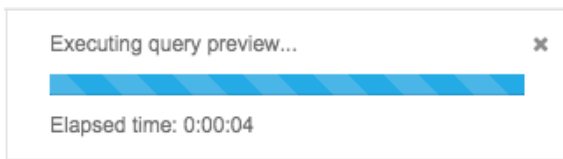


## PREVIEWING RESULTS

From the list of query results, you can get additional information by hovering or clicking on items in the table.

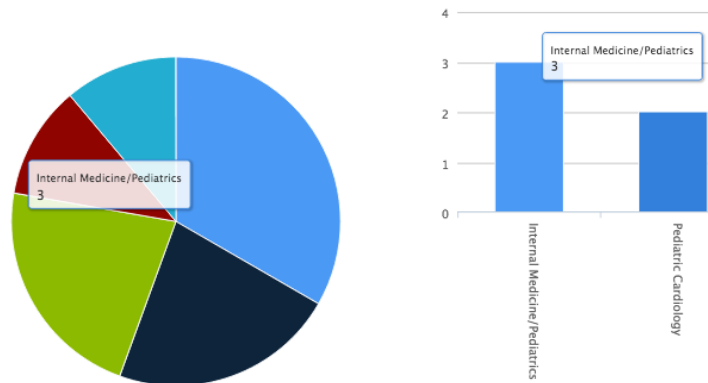Hover on a column title to see the specific field name for that column.

Hover over reference values, for example, specialties, to see their corresponding reference code.



As with tabular results, you can also hover over areas of your pie chart or graph to see detailed values.



You can also click on the Network ID for a row (if selected in the report criteria) to go directly to that profile in a separate browser tab.



## DOWNLOADING RESULTS

If the data visibility profile specified for your user profile does not have report download enabled, you will no longer see a **Download** icon above the results list. This affects previous as well as new users.

In situations where old report results have been deleted from the FTP server, the **Download File** and **View** links are not displayed; a message indicates that the report results are unavailable.

## SAVING A QUERY AS A REPORT

After you have refined all of the criteria for your report, you can save it to the **All Reports** list.

Click the **Save** button at the top right of the page, type a name and description for the report, and click the **Save** button in the dialog. The edit page opens for the report.

### Schedule

By default, the schedule is disabled. Click the **Enabled** check box to enable the report and set a schedule based on the following values:

- **Day –** Hour, and minute for the report to run each day.
- **Week –** Day of the week, hour, and minute for the report to run each week.
- **Month –** Numeric day of the month, hour, and minute for the report to run each month.
- **Year –** Month, day of the month, hour, and minute for the report to run each year.

### Share report

By default, the report is not shared with anyone and will not appear in the reports list, except for administrators. To share the report, define the following:

- **Viewers –** Click the text field or begin typing to add users for viewing permission only. You can add multiple users.
- **Editors –** Click the text field or begin typing to add users who can edit the report. You can add multiple users.
- **Send Email Notifications –** Click the check box to enable email notifications for the selected users when this report is run.

### Report data

The Report Data section enables you to modify the report criteria (or add or change code, for advanced query users) directly in the report.

### Save the report

Click the Save button at the top right of the report page to save the report to the reports list. You can now edit, scheduled and run the report just like any other. Specified users can view, edit, and run the report, depending on their permissions.

## SORTING AND SEARCHING REPORTS

The reports list now includes multiple controls to easily sort and find reports.

At the top left of the reports list, click the **Sort by** drop down list to sort the reports by report name, creator, creation date, or by the last time each report was run.

At the top right of the reports list, click the search field and begin typing a search term. The reports list automatically updates to display reports containing that term in their title.



## REPORT OPTIONS

For reports that are editable by you, you can click the pencil icon to the right of the report title to edit the report. The gear icon enables you to download, run, delete, or copy the report, depending on permissions.



## ADDING REPORTS

You can click the **Add Report** button at the top right of the reports list to create a new report. In the dialog box that appears after, type a report name and description, and then click the **Add** button.

The new report page enables you to set the schedule, share the report, enable email notifications, and define the report data. For information on updating scheduling and sharing properties, refer to the online help.

Note that the tabs in the **Report Data** section match those available through Ad Hoc Queries. Refer to those sections in the online help for details on defining report data.



## REPORT SCHEDULING

Report scheduling no longer includes an option to run reports on an hourly basis.
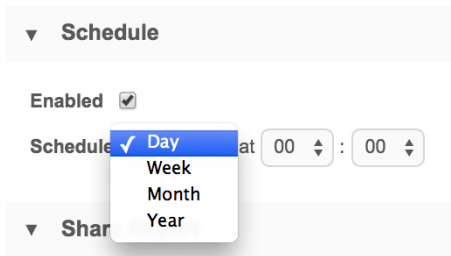
## REPORT EMAIL

When email notifications are turned on, report email recipients can click the link provided in the email to go directly to the results viewer for the corresponding report. In previous releases, this link went to the report result list, rather than the most recent results.

The look and feel of Reporting email notifications has been updated with a new layout and style, including layouts for mobile devices. For samples of the Reporting email notifications, see Email templates in this document.

## GENERAL ENHANCEMENTS

The Reports page and output have been updated with various styling:

- The **Export to CSV** button is now called **Download File**.
- The icon used in the reports list has been updated.
- The report result viewer buttons now include icons.
- The report result viewer table headings are now bold.



# Matching

## AD HOC MATCH

Ad hoc match export now includes all fields from the global data model, as well as two parent HCO records, where applicable; Previously, two addresses and two licenses were exported.

## SOURCE DE-DUPLICATION

Previously, records that were matched based on key did not go through the source de-duplication process. This resulted in occasional missed duplicates that existed in the source. Those duplicates are now matched and merged.

This change results in improved, more comprehensive matching during data loads when source de-duplication is enabled.

## MATCH CONFIGURATION

Network now provides comprehensive enhancements for match configuration through the user interface. When configuring match rules from within a source subscription, ad hoc match configuration, or default match configuration, administrators can define data groups (previously referred to as blockers) and match rules (previously referred to as classifiers) for HCOs and HCPs.

Administrators can still configure match rules in XML using the **Advanced** option when creating or updating a source subscription, configuring ad hoc match rules, or setting the default match configuration.

### CONFIGURING MATCH RULES

Administrators define match configurations from the following areas under **System Interfaces** in the admin console:

- **Adhoc Match Configuration** – Match configuration used only for ad hoc matching.
- **Match Default Configuration** – Default match configuration that can be used by any subscription in a Network instance.
- **Source Subscriptions** – Includes match configuration to be used by that specific subscription.

In a source subscription, match settings appear in the **Match Configuration** section of the subscription.

### *Select a country or group*

When you configure ad hoc match or default match configuration, you first select the country for which those rules apply. For ad hoc match or default match, you select a country from the Country **drop down** list.

In a source subscription, you must select a country group, consisting of one or more countries:



If no country group appears when you select the **Country Group** drop down list, you can click **Create a new country group** to create one.

In the **Create New Country Group** dialog box, type a name for the group, a country or countries to include in the group, and select the country to use as the template for the group. The contents of the template are then used as the starting point for all other countries in that group.

As you type country names in the **Countries** field, autocomplete options appear if matching countries exist.



## About default configurations

When you view any of the match configurations for the first time, radio buttons indicate that the configuration is the default. When it is set to **Default**, the configuration will be updated automatically when Veeva introduces enhancements to it.



When you begin updating the match configuration, the radio button automatically switches to **Override** to indicate that the configuration is solely customer-maintained; Veeva will not apply enhancements to the configuration. Once a configuration is customized and is no longer using the Veeva default, it cannot be reset to the default configuration.

## Define data groups

Data groups (or blocks) streamline the matching process by grouping similar items for comparison. The data groups you define, along with incoming data, determine the contents of each group from a customer instance. Data groups are created independently for HCP entities and for HCO entities.

To update data groups:

1. To the right of the data group list header, click the **Entity** drop down list and select **HCP** or **HCO** to work with the data group for that entity type.
2. Click the **Add Data Group** link at the bottom of the list (or the **+** at the top right of the list) to add more items to the group.
3. Type an optional descriptive name for the new group.
4. Type fields to include in the group. As you type, autocomplete options appear.
5. Click the **Allow null fields** field and select any fields in the group for which empty fields are allowed. (Fields in the data group that are not listed here will not allow null field values.)
6. Click the Enabled check box to include this data group in the matching process.
7. Type optional descriptive comments for the data group and click the Done button to add the new data group.
8. Click **Save** at the top of the page to save these changes to the subscription.

*Define match rules*

Match rules (or classifiers) determine how the actual matching is performed between incoming records and existing records within the defined data groups (or blocks). Individual data elements such as first, middle, and last name, are the key elements for final match rules, and are used to create features.

Features are combined in one or more ways to create feature sets and ultimately are assigned confidence levels that determine how Network treats record pairs that meet the rules for the feature set. You define feature sets and features for both the HCP entity and the HCO entity.

Feature sets are categorized by those that should result in an ACT (automatically merge) or an ASK (create a suspect match) result.

*Define feature sets*

| Data Groups | Match Rules |
|---|---|

The Match Rules dictate how matching is performed between incoming records and those in the Network instance, within each Data Group. For instructions on setting up Match Rules, please refer to the online help.

▼ **HCP Feature Sets**          ◯ Default ❶   ⦿ Override ❶   Entity  [ HCP  ▼ ]  [ + ]

| NAME | FEATURES | ENABLED |
|---|---|---|
| **Auto-Merge - ACT** ❓ | | |
| ☰ names are identical and l… | names are identical, licenses match | ✅ |
| ☰ names are identical and … | names are identical, address matches | ✅ |
| ☰ names are identical with … | names are identical with middle initial, licenses match | ✅ |
| ☰ names are identical with … | names are identical with middle initial, names are identical, address matches | ✅ |
| ☰ names are identical and … | names are identical, address line 1 is the same | ✅ |
| ☰ concatenated full names … | concatenated full names are identical, address matches | ✅ |
| ☰ **Suspect Match - ASK** ❓ | | |
| ☰ names are similar and ad… | names are similar, address line 1 is the same | ✅ |
| ☰ full names are similar an… | full names are similar, city is the same | ✅ |

+ Add Feature Set

To update feature sets:

1. Click the **Match Rules** tab to view the current match rules configuration.
2. To the right of the match rules header, click the **Entity** drop down list and select **HCP** or **HCO** to work with the match rules for that entity type.

3.   Click the **Add Feature Set** link at the bottom of the list (or the **+** at the top right of the list) to add more feature sets.
4.   Type a descriptive name for the new feature set.
5.   Type feature names to include in the feature set. As you type, autocomplete options appear.
6.   Click the Enabled check box to include this feature set in the matching process.
7.   Type optional descriptive comments for the feature set and click the **Done** button to add the new feature set.



8.   Click the handle to the left of the feature set and drag it to the position and category (ACT or ASK) that it belongs to. This position indicates its treatment order within the list of feature sets.
9.   Click **Save** at the top of the page to save these changes to the subscription.

## Define features

To update features:

1. Click the **Match Rules** tab to view the current match rules configuration.
2. To the right of the match rules header, click the **Entity** drop down list and select **HCP** or **HCO** to work with the match rules for that entity type.
3. Click the **Add Feature** link at the bottom of the list (or the **+** at the top right of the list) to add more features.
4. Type a descriptive name for the new feature.
5. Type fields to include in the feature. As you type, autocomplete options appear.
6. In the **Comparison method** drop down list, select the comparison method to use for the feature. You can hover over the **?** icon to see examples.
7. In the **Null value options** drop down list, select the method of treatment to use for null values. Refer to the online help for information on the different values.
8. In the **Success criteria** section, select an algorithm to use for the matching process. Refer to the online help for information on algorithms and their associated settings. You can click **Add Algorithm** at the bottom of this section to add more.
9. Click the Enabled check box to include this feature in the matching process.
10. Type descriptive comments for the feature and click the **Done** button to add the new feature.

| | |
|---|---|
| ⓘ Name * | Feature 19 |

| | |
|---|---|
| Fields * | administrative_area__v (Address) ✖  | |
| Comparison method ❓ | Sets of fields ▾ |
| Null value options ❓ | Neutral ▾ |
| Success criteria | ⦿ One ◯ All |

| | |
|---|---|
| Algorithm | Jaro-Winkler ▾ |
| Include Winkler portion of algorithm | ☐ |
| Names should match (HCPs in Latin languages only) | ☐ |
| Threshold | 0.7 |

+ Add Algorithm

+ Add Field

| | |
|---|---|
| Enabled | ☑ |
| Comments | |

Cancel  **Done**

**Note:** If a feature does not appear in any feature set defined in the previous section, an information icon appears next to the feature name to indicate its exclusion.



## Candidate records

Candidate records are temporary records created to enable data stewards to verify data quality before promoting a record as a valid record. They are created through data load only, and are not pushed to downstream systems.

**Note:** You cannot search candidate records in Network from CRM.

### ENABLE THE CANDIDATE RECORD FEATURE

To enable the use of candidate records, perform the following actions in the admin console:

1.  On the General Settings page, near the bottom, select **Enable Candidate Record Data Model Field**.
2.  Click the **Save** button.

This action creates and enables the candidate_record__v field in the data model. You must also enable the use of candidate records for corresponding data visibility profiles.

### ENABLE CANDIDATE VISIBILITY

After an administrator has enabled the use of candidate records, they must also be enabled for corresponding data visibility profiles.

1.  In the admin console, click **Users** and select **Data Visibility Profile** in the left navigation.

2.    At the bottom of the profile, click the **Edit** button.

## US Data

Primary Information

| | |
|---|---|
| Profile Name* | US Data |
| Description | Page layouts for US Data fields |
| Default (When Creating New User) | True |
| Last Modified By | customer.admin@network.com |
| Last Modified At | 2015-04-27 13:06:06 |

Permissions

| | |
|---|---|
| Country | United States |
| HCP Visibility | All HCPs are visible. Use filter to control visibility for HCPs    Add Filter |
| HCO Visibility | All HCOs are visible. Use filter to control visibility for HCOs    Add Filter |
| Read-only access | True ✓ False |
| Candidate Visibility | |
| HCP Opt Out Visibility | False |

Page Layout

| | |
|---|---|
| HCP Page Layout | USStandard |
| HCO Page Layout | USStandard |

Search

| | |
|---|---|
| Can search Master Instance | True |
| Can download/sync records from Master Instance to this Network Instance | True |
| Can export from Search | True |
| Can Search Contract Organizations | False |

Cancel    Save

3.    At the bottom of the profile, click the **Save** button.

Within a profile, a gray icon with a question mark badge denotes a candidate record.

### UPDATE SOURCE SUBSCRIPTIONS FOR CANDIDATE RECORDS

If you intend on creating candidate records on data load, you must update the corresponding source subscription to specify that candidate records should be created on unmatched or suspect match records.

In the **Details** section of the source subscription, in the **Action for Unmatched & Suspect Match** drop down list, select **Create Candidate Records**.



**Note:** The resulting candidate records will be searchable locally, but will not be synchronized with or searchable from downstream systems.

If the candidate records feature is not enabled, then the **Action for Unmatched & Suspect Match** drop down list will have only two options: **Create Valid Records** (which is the current behavior) and **No Action** (do not load unmatched records).

## UPDATE TARGET SUBSCRIPTIONS FOR CANDIDATE RECORDS

In a target subscription, select **All** in the **Record Type** field to export all records, including candidate records. You can also select **Candidate** to export only candidate records, or Non-candidate to exclude candidate records.



Note that the **Record State** label has been updated in this release. Selecting **Valid & Under Review** only exports records with a record state of **Valid** or **Under Review**.

## VIEW AND PROMOTE CANDIDATE RECORDS

If candidate record visibility is enabled, and candidate record creation is enabled in the source subscription, users will see candidate records in search results. To filter for candidate records, in the **Quick Filters** section in the left navigation, select **Is Candidate** and **Yes/True**, and then click the **Filter** button.

To promote a candidate record to a valid record, open the record profile and click the **Promote** button at the top right of the record. Promoted records will be pushed to downstream systems on export.



To soft delete a record, click the **Delete** button at the top right of the profile.

**Note:** Only data stewards can delete or promote a candidate record, if their data visibility profiles grant them access.

## Third-party data sources

When you create or edit a data source, you can now specify whether that source is a third-party master data source, and configure change request routing behavior and specify change request-enabled fields for the system.

Third-party systems are data sources that send records *to* Network, and process add or change requests that come *from* Network. Records that belong to third-party master sources never interact or mix with Veeva OpenData records.

The setting for each data source appears on the Systems page:

## Systems
Add System

| NAME ▲ | DESCRIPTION | THIRD PARTY MASTER | PROPRIETARY |
|---|---|---|---|
| change_request | Network Change Requests | ☐ | ☐ |
| customer | Customer Data | ☐ | ☐ |
| TP_master_src | Third Party Master | ☑ | ☐ |

**Note:** You can only configure one master per country: either a third-party master or Veeva OpenData master. If a master is already configured for a country, that country appears grayed out when you are configuring the data source.

### CONFIGURE A THIRD-PARTY DATA SOURCE

From **Admin > System Interfaces**, click the **Add System** button to create a data source. Type a name and description for the system, and select the **Yes** radio button next to **Third Party Master**. When you select **Third Party Master**, the **DCR Routing Criteria** section appears.

## New System

Cancel  Save

▼  **Details**

**Name**  TP_master_src

**Description**  Third-party data source.

**Third Party Master**  ◉ Yes  ○ No

**Unmerge Ability**  Do not unmerge

▼  **DCR Routing Criteria**

**Countries** ❓  Select an option

**HCP Type**  All ✕

**HCO Type**  All ✕

⌄  **DCR Enabled Fields**

| Available Fields 🔍 | | Selected Fields 🔍 |
|---|---|---|
| *No available fields* | » › ‹ « | *No selected fields* |

*Select which fields are DCR enabled for a particular third party data provider.*

**Note: Unmerge Ability** is always set to **Do not unmerge** for third-party systems.

## CONFIGURE CHANGE REQUEST ROUTING BEHAVIOR

In the **DCR Routing Criteria** section, type one or more countries to include in the routing process. Entries auto-complete as you type them. After you select at least one country, available fields appear in the **DCR Enabled Fields** section.



In the **HCP Type** and **HCO Type** fields, **All** is selected by default to include all types. You can delete it and begin typing to select one or more specific types to include.



## Enable fields for change requests

The **DCR Enabled Fields** section enables you to specify which fields cannot be updated locally through change requests for this system. To include fields, expand each entity in the **Available Fields** pane and click the **>** button to add them to the **Selected Fields** pane. To include all fields, click the **>>** button.

## Veeva OpenData subscription

The Veeva OpenData Subscriptions page enables administrators to see all countries for which Veeva OpenData is provided.

| COUNTRY | SUBSCRIPTION ENABLED | | SCHEDULE | LAST JOB TIME | LAST JOB STATUS |
|---|---|---|---|---|---|
| Australia | ○ Yes | ● No | Manual | | |
| Austria | ○ Yes | ● No | Manual | | |
| Belgium | ○ Yes | ● No | Manual | | |
| China | ○ Yes | ● No | Manual | | |
| Czech Republic | ○ Yes | ● No | Manual | | |
| Denmark | ○ Yes | ● No | Manual | | |
| Finland | ○ Yes | ● No | Manual | | |
| France | ● Yes | ○ No | Manual | | |
| Germany | ○ Yes | ● No | Manual | | |
| Hungary | ○ Yes | ● No | Manual | | |
| Iceland | ○ Yes | ● No | Manual | | |
| Ireland | ○ Yes | ● No | Manual | | |
| Italy | ○ Yes | ● No | Manual | | |

### Enable or disable a Veeva OpenData subscription

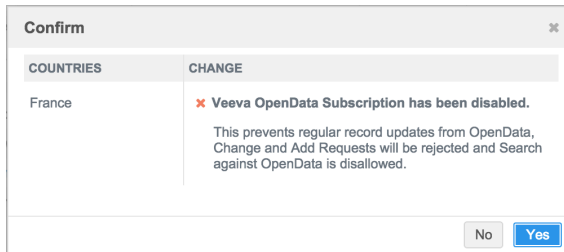To enable or disable a subscription for a particular country:

1. In the admin console, select **System Interfaces**.
2. In the left navigation, select **Veeva OpenData Subscriptions**.
3. On the Veeva OpenData Subscriptions page, select one or more countries to enable or disable. If the selections are grayed out, the Veeva OpenData subscription has not been enabled by Veeva.

| COUNTRY | SUBSCRIPTION ENABLED | | SCHEDULE | LAST JOB TIME | LAST JOB STATUS |
|---|---|---|---|---|---|
| Australia | ○ Yes | ● No | Manual | | |
| China | ○ Yes | ● No | Manual | | |
| Denmark | ○ Yes | ● No | Manual | | |
| Finland | ○ Yes | ● No | Manual | | |
| France | ● Yes | ○ No | Manual | | |
| Ireland | ○ Yes | ● No | Manual | | |
| Italy | ○ Yes | ● No | Manual | | |
| Japan | ○ Yes | ● No | Manual | | |
| Norway | ○ Yes | ● No | Manual | | |
| Sweden | ○ Yes | ● No | Manual | | |
| United Kingdom | ● Yes | ○ No | Manual | | |
| United States | ○ Yes | ● No | Manual | | |

4. At the top left of the page, click the **Save** button. A confirmation dialog appears.



5. Click **Yes** to enable or disable the subscription or **No** to cancel the change.

## Update a Veeva OpenData subscription

To update a subscription for a particular country:

1. In the admin console, select **System Interfaces**.
2. In the left navigation, select **Veeva OpenData Subscriptions**.
3. On the Veeva OpenData Subscriptions page, click the country name for the Veeva OpenData subscription you want to update. The country name appears as a hyperlink only if the subscription has been enabled. When you click the country link, the Veeva OpenData subscription page appears for that country.

4.  Review and update the following sections for the subscription:
    - **Details –** The name, system, and description for the subscription. You cannot edit these fields.
    - **Working Set –** The FTP path to the working set for the subscription. You cannot edit the path.
    - **Schedule –** The schedule for the subscription (if not set to **Manual**). You can set a schedule for the subscription similarly to other source subscriptions in Network. See the online help for more information on setting schedules.
    - **Veeva OpenData License –** Data filters that enable you to download additional records based on the criteria you provide (specialties and types). All filter criteria must be satisfied for a record to be included.
5.  To use data filters, in the **Veeva OpenData License** section, click the radio button for the entity specialty or type you want to include.
6.  In the text field for the specialty or type, begin typing to see auto-complete options, and select one or more specialties and types for the corresponding entity.



7.  At the top right of the subscription page, click the **Save** button.

Note that you can also run the subscription manually from this page, or perform an ad hoc download for selected entities.

To perform an ad hoc download, click the **Adhoc Download** button at the top of the page and specify one or more entity IDs for the records you want to download.

### JOB HISTORY

The job history for the Veeva OpenData Subscription may not be visible after release deployment. This will be fixed in the next Network release. Please reach out to support if you need faster access to job history.

## Workflow

The Workflow Settings page has been enhanced to allow more specific auto-approve and review configuration. The **Strong Match**, **Skip Address Verification**, and **Create Unverified** options are available and function the same as previous releases.

### AUTO-APPROVE SETTINGS

The Workflow Settings page enables administrators to determine behavior for auto-approving new or changed customer-owned records.

To update behavior for these options, in the corresponding sections, click the entity field you want to update and select or type a value you want to enable for automatic approval. If **None** appears in the field, you must first click the **x** to remove it, before adding one or more values to the field.



At the bottom of the Workflow Settings page, click **Save** when you are done.

### REVIEW MASTER REJECTION SETTINGS

You can update the behavior for automatic review of master rejections similarly. By default, review of master rejections is set to **None**.

To update this behavior to allow data stewards to review master rejection of specific entity creations, click the entity field you want to update and select or type a value to enable for review. If **None** appears in the field, you must first click the **x** to remove it, before adding one or more values to the field.



At the bottom of the Workflow Settings page, click **Save** when you are done.

## CREATING COUNTRY EXCEPTIONS

You can create exceptions to the workflow settings by country. To add an exception, click the **+** icon to the left of the **Exceptions** section on the Workflow Settings page.

In the **Countries** field, begin typing or click and select a country from the list. You can include more than one country in this field.



Update the general workflow settings and auto-approve and review rejection behavior as before, and click **Save**.

## Record profiles

The record profile page now includes summary information to make it easier to see key details about the record you're viewing.

Information provided at the top of the profile page now includes the following:

- A larger icon representing the HCO or HCP and the record state.
- The HCO or HCP name and Network ID.
- Alternate keys.
- The primary specialty.
- The primary address (address with smallest address_ordinal__v).
- The best phone number (if there are phone numbers on the HCP/HCO and the address/parenthco then the HCP/HCO number will be displayed).
- The best license, based on the license status and best state license flag.
- The HCO or HCP type and degree.
- The date the record was last modified.

For HCOs, it appears as follows:



**Note:** The information in the summary area is not editable; it is only provided to display information that already exists in each corresponding section.

Empty fields do not appear in the new profile summary.

## Name formatting

This release introduces support for country-specific name formatting. These formats are applied whenever a record is loaded from the system for display or export purposes, including change requests, profile pages, target export subscriptions, search, REST APIs, and so on.

The following table outlines the format used for various countries and regions.

| Country | HCP | HCO |
|---------|-----|-----|
| UK | prefix + space + first name + space + first letter(s) of middle name(s) + space + last | Corporate name |

| | name + space + suffix | |
|---|---|---|
| France, German, Italy, Spain | prefix + space + first name + space + last name | Corporate name |
| Japan | last name + space + first name | Corporate name |
| China | last name + fist name (without space) OR full name | Corporate name |
| Australia | prefix + space + first name + space + last name | Corporate name |

## Primary affiliation

Administrators can now create a primary affiliation custom field so that data stewards can manage the relationship between multiple affiliations on a profile.

Data stewards update the primary affiliation from either an add or a change request, by selecting a value from the Primary Affiliation drop down list.



### ENABLING PRIMARY AFFILIATION SELECTION

Before data stewards can manage primary affiliations, an administrator must create and enable the primary field.

In the admin console, on the Data Model page, click the **Create Custom Field** button. On the Create Custom Field page, type a name for the field and select **Primary Affiliation** in the **Type** drop down list.

Ensure that the **Enabled?** box is checked. Select one or more countries to enable the field for in the **Countries** section, and specify locale-specific labels in the **Labels** section.

If specified, the primary affiliation now appears in the **Parent Affiliations** section header when the **Parent Affiliations** section is collapsed. This enables you to see which affiliation is set as primary without expanding the section.



## DATA LOADING AND SURVIVORSHIP

Survivorship of affiliations during data load or change requests involving primary affiliation updates depends on the status (active, inactive) of the record, the source system rankings, and timestamp information.

Primary affiliations cannot be inactive or invalid. If multiple primary affiliations are defined, the entity is not loaded.

If an existing primary affiliation is marked as no longer primary through a change request, the affiliation will be excluded while auto-computing. However, if a similar change is applied through a data load, the affiliation will be included while auto-computing.

## AUTO-COMPUTE RULE FOR PRIMARY AFFILIATIONS

A primary affiliation is auto-computed if there are no affiliations found on an HCP. Inactive and invalid affiliations are filtered out. The affiliation or affiliations that came from the highest ranking source are considered as potential candidates.

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If there are multiple affiliations in the highest ranking source, the affiliation on which the primary affiliation field was updated most recently is set to primary. If the timestamp on the primary affiliation field is the same for all affiliations, then no affiliation is set to primary.

### MERGE AND UNMERGE

For merged HCP records, if a primary affiliation exists in the winning record, it will carry over to the merged record. If a primary affiliation exists in the losing record and there is no primary affiliation on the winning record, the primary affiliation from the losing record will be persisted for the merged record.

If no primary affiliation exists in both the winning and losing record, a primary affiliation is automatically computed for the merged HCP record.

During unmerge, primary affiliations are recovered (if set) for both the winning and losing HCP records. If no primary affiliations existed, a primary affiliation is automatically computed for each record.

## Primary address

For merged HCP records, if a primary address exists in the winning record, it will carry over to the merged record. If a primary address exists in the losing record and there is no primary address on the winning record, the primary address from the losing record will be persisted for the merged record. If no primary address exists in both the winning and losing record, a primary address is automatically computed for the merged HCP record.

During unmerge, primary addresses are recovered (if set) for both the winning and losing HCP records. If no primary addresses existed, a primary address is automatically computed for each record.

## Address ordinals

Previously, for customer-owned addresses on customer-owned and Veeva OpenData records, address ordinals with a value of 99 were excluded from sorting and the value of 99 would never change. All address ordinal values are now included in address sorting rules; when changes are made to address ordinal values for a particular customer-owned address, all ordinal values including the value of 99 are re-evaluated and updated as needed.

If a new address is submitted without an ordinal value, a default value of 99 is assigned. Once the change request has been processed, all ordinal values for that record, including the new one, are re-evaluated and updated if required.

Ordinals for client-owned addresses on Veeva OpenData records are numbered immediately after the highest ordinal value for Veeva OpenData addresses.

In addition, Veeva OpenData addresses are now also sorted within each master instance using the same rules that are applied to customer-owned addresses. Moving forward, Veeva OpenData customers will benefit from unique and sequential address ordinals for Veeva

OpenData addresses. This change applies to all Veeva OpenData addresses except for US Veeva OpenData addresses, which are sorted and ranked outside of Network.

## Address cleansing

The address database used by Network has been upgraded to a new version.

## Search

When you perform a search in Network, you now see an approximate value next to the facet even when there are more than 90 000 results. You can hover over the approximate value to view exact values for large result counts.
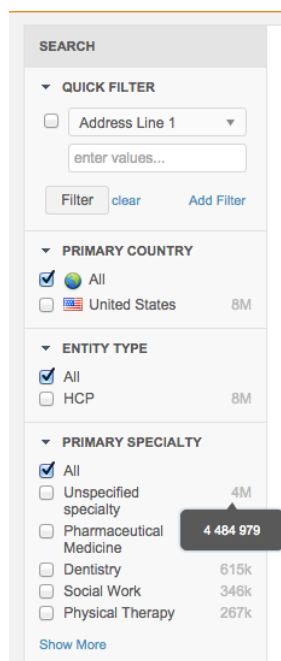


When you perform a search by Veeva ID, Network displays the profile of the relevant record; the search list is not displayed, as only one record is returned.

Export from search now includes all fields from the global data model, as well as two parent HCO records, where applicable; Previously, two addresses and two licenses were exported. The export file name no longer includes a timestamp.

## Opt-out

Data visibility profiles now include an option to hide opted-out records. This ensures that records intended to be opted out are hidden from standard users.

1.   To hide opted-out records, from the admin console, click **Users**.
2.   In the left navigation, click **Data Visibility Profile**.

3. On the Data Visibility Profile page, select a profile.
4. Click the **Edit** button at the bottom right of the profile.
5. Click the drop down list next to **HCP Opt Out Visibility** and select **True**.



6. At the bottom right of the profile, click the **Save** button.


## Single Sign-On

Single sign-on configuration now enables administrators to define mappings between countries and data visibility profiles for automatically created users.

For example, if a mapping exists for the US to the data visibility profiles for the US and China, automatically created users will have both data visibility profiles.

1. To define mappings, in the admin console, click Settings and select SSO Settings in the left navigation.
2. At the bottom of the Single Sign-On Settings page, click the Edit button.
3. Under **Country and Data Visibility Profile Mapping**, click the **Add Mapping** link.
4. Select a country from the **Country** drop down list. You can begin typing a value to see auto-complete options in this field.

5.  Select one or more data visibility profiles from the **Profile** drop down list. You can begin typing to see auto-complete options in this field. Click **Done**.



6.  At the bottom of the Single Sign-On Settings page, click the **Save** button.

## User profiles

### INACTIVE USER PROFILES

Inactive user profiles are no longer displayed in drop down lists; for example, when re-assigning a task the drop down list for the assignee only displays active users.

### DATA MANAGER ROLE

This release introduces the data manager role. This user role provides all of the functionality of the data steward role, along with the following functionality formerly only available to administrators:

- Ability to view the data model and add or update custom fields and reference types.
- Access to the **System Interfaces** section to add or update source and target subscriptions, systems, match configurations, update source rankings, and perform data migration.

When you log into Network as a data manager, the admin console appears with a list of pages accessible to the role.

## Data load

### BULK MERGE

On data load, you can merge records in bulk through a source subscription by providing the losing and surviving Network Entity IDs in the source file feed.

#### *Specify surviving records*

You provide the Network Entity ID of the surviving record in the merge_survivor_vid column; for example:

| vid__v | corporate_name__v | merge_survivor_vid |
|---|---|---|
| 462313821042639872 | University Health Centre | 462313820975531008 |

### Enable bulk merge

You enable bulk merge for a particular source subscription by clicking the **Advanced** button in the source subscription and enabling the following property in the **Module Properties**:

```
"job.merge.allowSourceMerge": "true"
```

### Bulk merge behavior

By default, merge does not run full survivorship; it performs the following:

- Updates record states
- Moves custom keys
- If the surviving record has no value for a particular field, it takes the corresponding value from the losing record.

You can run merge to use full survivorship by updating the following property in the **Module Properties** for the source subscription:

```
"job.merge.mergeInstruction": "InclusiveMerge"
```

### Considerations

A single source subscription can process additions, updates, merges, and invalidations.

The surviving record does not to be in the data feed; however, it must have a Network Entity ID (vid__v).

You should ensure that no circular merges exist. For example, a merge of A > B > C > D will work properly, but a merge of A > B > C > A results in an error. The latter merge operations will not be processed, but all other updates and merges will be unaffected.

### INVALIDATE FUNCTION

In rule expressions for a source subscription, you can now use the INVALIDATE function which will update the following:

- The record state is set to INVALID, effectively removing it from Network.
- The record status is set to INACTIVE.
- All custom keys are inactivated.
- If performed against an HCO or HCP, invalidate also affects all related licenses, addresses, and affiliations for the record.

The INVALIDATE function is valid for all entities. The following are examples of its use on the source subscription page for HCO (invalidating based on status) and address (invalidating based on address type).

## DROP FUNCTION

In rule expressions for a source subscription, you can now use the DROP function to drop child objects (including address, license, and parenthcos) under the post-merge rule point. For example:



**Note:** The DROP function discards the record without a warning message in the job details UI. If you require a message, use the REJECT function instead.

## Reference data

Reference data now includes a column containing descriptions, where specified, for reference codes.

When you export reference data from **Data Model > Reference Data**, the resulting spreadsheet includes a column for reference code descriptions. You can provide descriptions directly in the spreadsheet in the new **Definition** column for non-Veeva OpenData codes only.

## Inbox and My Requests filters

In the My Requests and Inbox items, filter by entity name now works properly for tasks created in this (and later) releases.

## Compliance reporting

The US Compliance Target subscription excludes candidate records and opted-out HCP records.

The Network API includes the ability to create, retrieve, and cancel the US Compliance target subscription. See US Compliance target subscription in this document for more details.

## General enhancements

The following general enhancements have been applied in this release.

### ADAPTIVE UI

The Network UI layout now adjusts depending on the size of a user's display. This enables you to view more details on pages that would normally require scrolling; for example, the inbox.

The following example shows the inbox in low resolution:



This example shows the same inbox in high resolution:

**Note:** The Network UI is not optimized for mobile devices and resolutions less than 960px in width.

## EMAIL TEMPLATES

The look and feel of Network email notifications has been updated with a new layout and style, including layouts for mobile devices.

The following is the standard email notification template for Reporting:
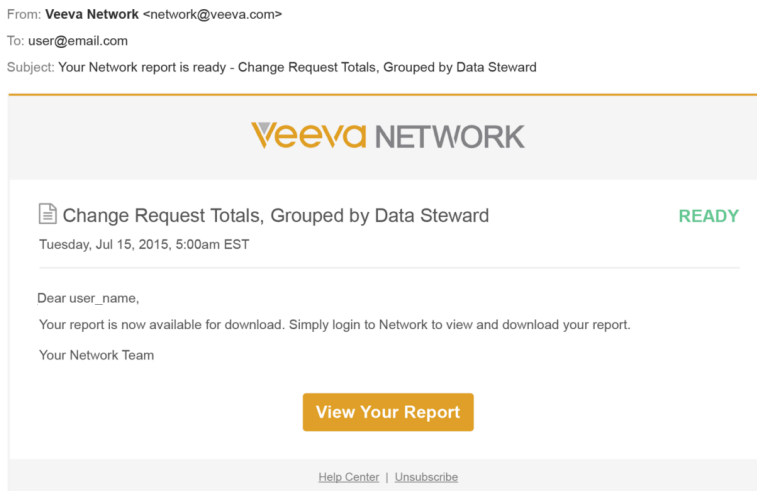


The following is the standard Welcome email:
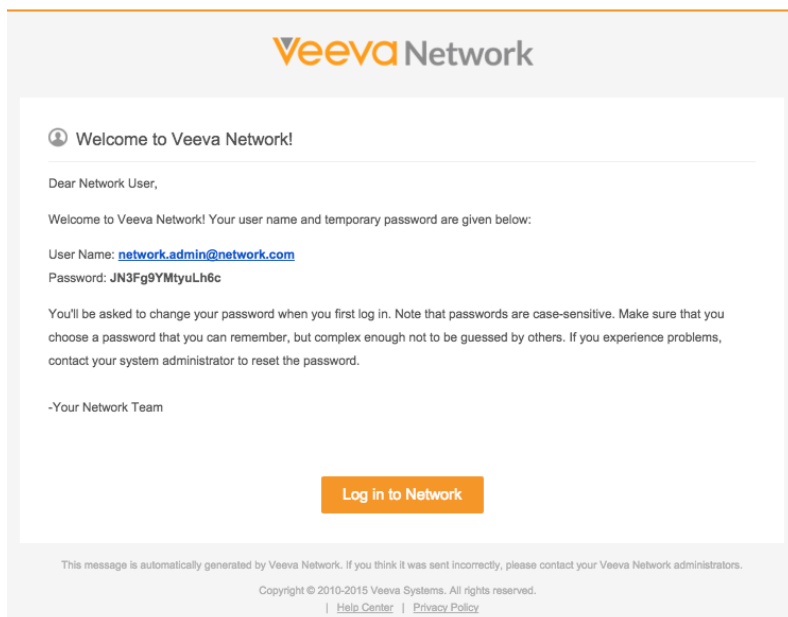
The following is the standard Password Reset email:
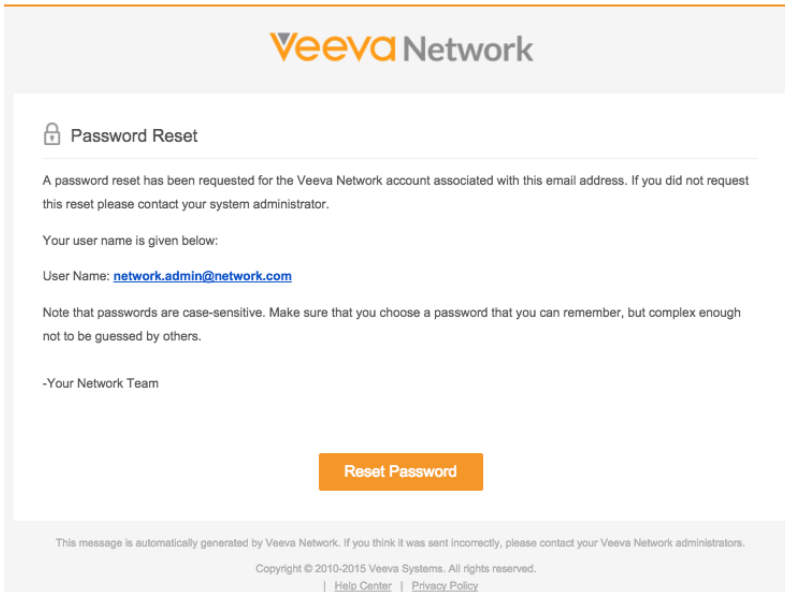


The following formats illustrate the look and feel for Reporting notifications on mobile devices. The Welcome and Password Reset emails use the same format.
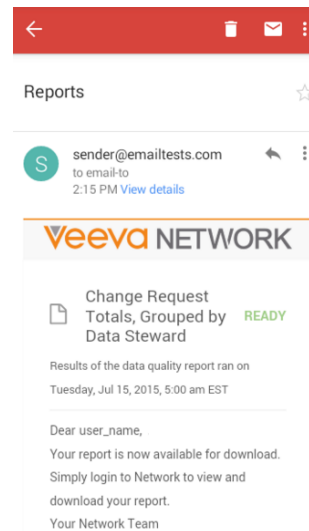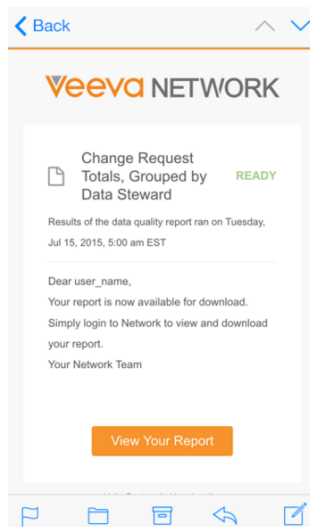


## RECENT ITEMS

You can now view and revisit your recent history in Network, including profiles, tasks, and reports. To view recent items, select the **Recent** drop down list at the top right of the Network UI.
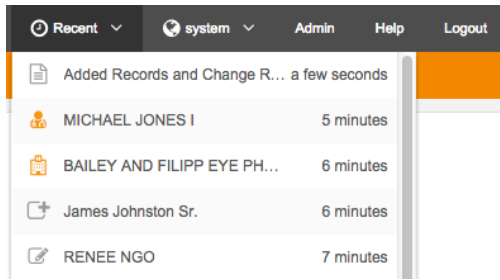
You can scroll through the recent items to view more; The list refreshes as you scroll.

## Localization

This release includes localization for Brazilian Portuguese, as well as localization support for Greek and Russian reference data.

## API

The following updates have been introduced for Network APIs in this release.

### US COMPLIANCE TARGET SUBSCRIPTION

You can now access the US Compliance target subscription from the API, including the ability to create, retrieve, or cancel the subscription.

#### Create compliance subscription job

The Create Compliance Subscription API enables you to create a US Compliance target subscription. The endpoint URL is as follows:

```
https://{dns}/api/{version}/systems/compliance_subscriptions/
   {subscription_name}/job
```

where:

- *dns* is the URL for the customer API service
- *version* is the API version
- *subscription_name* is the unique name for the compliance subscription (currently only umd_us__v)

#### Parameters

None.

#### Sample request

```
POST https://my.veevanetwork.com/api/v7.0/systems/compliance_subscriptions/
   umd_us__v/job
```

#### Sample response

```
{
   "responseStatus": "SUCCESS",
```

```
    "job_id": 254
}
```

where:

- `responseStatus` indicates the success of the reception
- `job_id` is the unique ID of the job generated for the compliance subscription

## Cancel compliance subscription job

The Cancel Compliance Subscription API enables you to cancel a US Compliance target subscription. The endpoint URL is as follows:

```
https://{dns}/api/{version}/systems/compliance_subscriptions/
    {subscription_name}/job/{job_id}
```

where:

- *dns* is the URL for the customer API service
- *version* is the API version
- *subscription_name* is the unique name for the compliance subscription (currently only umd_us__v)
- *job_id* is the unique ID of the job

### Parameters

None.

### Sample request

```
DELETE https://my.veevanetwork.com/api/v7.0/systems/compliance_subscriptions/
    umd_us__v/job/254
```

### Sample response

```
{
    "responseStatus": "SUCCESS"
}
```

where:

- `responseStatus` indicates the success of the cancellation

## Retrieve compliance subscription job

The Retrieve Compliance Subscription API enables you to retrieve details for a US Compliance target subscription. The endpoint URL is as follows:

```
https://{dns}/api/{version}/systems/compliance_subscriptions/
    {subscription_name}/job/{job_id}
```

where:

- *dns* is the URL for the customer API service
- *version* is the API version

- *subscription_name* is the unique name for the compliance subscription (currently only umd_us__v)
- *job_id* is the unique ID of the job

*Parameters*

None.

*Sample request*

```
GET https://my.veevanetwork.com/api/v7.0/systems/compliance_subscriptions/
   umd_us__v/job/254
```

*Sample response*

```
{
     "responseStatus": "SUCCESS",
     "subscriptionId": 12,
     "subscriptionName": "umd_us__v",
     "durationInMilliseconds": 2000,
     "type": "COMPLIANCE",
     "errorCount": 0,
     "badRecordCount": 0,
     "crossReferenceDetails": [
         {
             "object": "HCO",
             "source": "NPI",
             "count": 2819,
             "matched": false
         },
         {
             "object": "HCP",
             "source": "SLN",
             "count": 1835,
             "matched": false
         },
         {
             "object": "HCP",
             "source": "SLN",
             "count": 13881,
             "matched": false
         },
         {
             "object": "HCO",
             "source": "CMS_TEACHING_HOSPITAL",
             "count": 826,
             "matched": false
         },
         {
             "object": "HCO",
             "source": "DEA",
             "count": 30,
             "matched": false
         },
         {
             "object": "HCP",
             "source": "NPI",
```

```
            "count": 6578,
            "matched": false
        },
        {
            "object": "HCP",
            "source": "DEA",
            "count": 106,
            "matched": false
        },
        {
            "object": "HCP",
            "source": "DEA",
            "count": 6263,
            "matched": false
        },
        {
            "object": "HCO",
            "source": "CMS_TEACHING_HOSPITAL",
            "count": 5532,
            "matched": false
        },
        {
            "object": "HCO",
            "source": "NPI",
            "count": 5730,
            "matched": false
        },
        {
            "object": "HCP",
            "source": "NPI",
            "count": 494,
            "matched": false
        },
        {
            "object": "HCO",
            "source": "DEA",
            "count": 44,
            "matched": false
        }
    ],
    "job_id": 350,
    "job_status": "COMPLETE",
    "created_date": "2015-10-16T08:14:57.000-07:00",
    "export_package_path": "outbound/US_Compliance_Target_Subscription
        /source_data_150715T205219904_job_0000010C.zip",
    "completed_date": "2015-10-16T08:14:59.000-07:00"
}
```

where:

- `responseStatus` indicates the success of the cancellation
- `job_id` is the unique ID of the job generated for the compliance subscription
- `job_status` is the status of the job created for the compliance subscription
- `created_date` is the date the job was created in GMT time
- `subscriptionId` is the ID of the subscription

- `subscriptionName` is the name of the subscription
- `completed_date` is the time the subscription was completed
- `durationInMilliseconds` is the duration of the job in milliseconds
- `type` is the type of the subscription (always COMPLIANCE)
- `errorCount` is the number of errors for the subscription
- `badRecordCount` is the number of bad records in the subscription
- `export_package_path` is the export file location (including the file name)
- `crossReferenceDetails` is an array of reference counts:
  - `object` is the type of object, either HCP or HCO
  - `source` is the compliance source
  - `matched` is true if `count` is the number of matched records, false if `count` is the number of unmatched records
  - `count` is the number of objects returned

## THIRD-PARTY SYSTEMS

The Retrieve Systems Metadata API now includes the following flag in its response data:

`isThirdParty` – Indicates whether the system is a third-party data source (true or false).

## RETURN EXTERNAL CUSTOM KEY

The Change Request Search, Retrieve Change Request, and Batch Retrieve Change Request API now include external_custom_keys in the response, if a system name (systemName) is provided in the request parameters.

```
"external_custom_keys": [
     "TPPD_Source:HCP:Test123Key"  ]
```

## RETURN TASK TYPE

The Retrieve Change Request and Change Request Search API now include task_type and original_task_type in the response. Possible values for these types are:

- **ADD_REQUEST** – A change request submitted on an existing record in Network.
- **CHANGE_REQUEST** – An add request for a new record in Network.

```
{

  "responseStatus":"SUCCESS",

  "change_requests":[{


    ...


    "taskCountry":"TR",

    "task_type":"ADD_REQUEST",

    "original_task_type":"ADD_REQUEST",
```

```
        . . .
    }

  ]

}
```

### SEARCH ON THIRD PARTY DATA

When you use the Search API with the masterSystemNames or pendingMasterSystemNames parameters, all non-third-party data fields are excluded from the results.

### CHANGE REQUEST API

Changes issued using  the Change Request API in the following scenarios are rejected with an error in the response.

- multiple affiliations are set to primary
- an inactive or invalid affiliation is set to primary