

SeeBeyond ICAN Suite

eIndex Single Patient Identifier Composite Application Release Notes

Release 5.0.5



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Version 20041217104725.

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Introduction

This document summarizes new features and changes to the SeeBeyond® eIndex Single Patient Identifier Composite Application (eIndex™) since release 4.5.3. The eIndex Single Patient Identifier Composite Application was previously known as e*Index Global Identifier.

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1.1 Overview

The 5.0 release of eIndex changed the underlying architecture of the product, providing a more configurable and flexible master person index. eIndex is tightly integrated with the SeeBeyond Integrated Composite Application Network (ICAN) Suite and exists within a Project of the ICAN Suite environment. eIndex 5.0 takes advantage of eGate's new J2EE-compliant integration platform and framework GUIs. The configuration and application files for eIndex are stored in the Repository and accessed through the Enterprise Designer.

The components of eIndex are designed to work within the Enterprise Designer to configure the eIndex application, and to define connectivity between external systems and eIndex. eIndex consists of several components, each acting independently of the others, but working together to provide accurate data maintenance and identification. These components interact with other SeeBeyond ICAN products, such as eGate Integrator and external eWays, and through them with the external data processing products and systems used by an organization.

eIndex also provides a sample of how data can be processed through the master index using an eInsight Business Process instead of, or in addition to, the standard Java Collaborations.

1.1.1 Where to Find More Information

The complete set of eIndex and ICAN Suite documentation can be uploaded to the Repository and then accessed from the DOCUMENTATION tab of the Enterprise Manager. These guides are provided in PDF format and require Adobe Acrobat Reader (available free over the Internet at <http://www.Adobe.com>). In addition, the Enterprise Designer and Enterprise Data Manager include online help, and the eIndex API is documented in a set of Javadocs.

1.2 Installation and Upgrade Changes

eIndex is no longer installed using a standard InstallShield Wizard. Instead, eIndex is uploaded directly into the ICAN Suite Repository and then installed through the Enterprise Designer. This installation includes all of the files you need for eIndex, including configuration files, application files, database scripts, sample Connectivity Maps, and the complete Java API. For information about installing eIndex, see the *eIndex Single Patient Identifier Composite Application User's Guide*; for information about upgrading eIndex from version 4.5.3, see the *eIndex Single Patient Identifier Composite Application Upgrade Guide*.

1.3 Operating Systems

eIndex is available on the following operating systems.

- Windows 2000 SP3 and SP4, Windows XP SP1a, and Windows Server 2003
- HP Tru64 V5.1A with patch 5 and V5.1B with required patches
- HP-UX 11.0, 11i (PA-RISC), and 11i v2.0 (11.23) with required patches and parameter changes
- IBM AIX 5.1L and 5.2 with required Maintenance level patches
- Red Hat Enterprise Linux AS 2.1 (Intel x86)
- Red Hat Linux 8 (Intel x86)
- Sun Solaris 8 and 9 with required patches

Important: *Linux is not supported for implementations using the Ascential INTEGRITY matching algorithm.*

The client workstations used to access the Enterprise Data Manager can run on the following platforms. These workstations must have Internet Explorer 6.0 SP1 installed.

- Windows 2000 SP2 or later
- Windows XP SP1a or later

1.4 System Requirements

eIndex requires the following software from SeeBeyond and other vendors.

1.4.1 SeeBeyond Products

eIndex now requires the following versions of eGate and add-ons. This version of eIndex does not require a database eWay.

- eGate Integrator 5.0 or later (along with the Enterprise Designer and a Logical Host)
- File eWay 5.0 or later (to install the Projects)
- Oracle eWay 5.0 or later (only if using the eWay for database connectivity). If you plan to connect to the database using the OCI driver, you must install the Oracle eWay version 5.0.3 or later.

1.4.2 Database Software

eIndex 5.0 supports Oracle 8.1.7 or 9i, but does not support Microsoft SQL Server or Sybase at this time.

1.4.3 Matching Algorithms

In addition to continued support of the Ascential INTEGRITY matching algorithm, eIndex provides the option of using SeeBeyond's propriety matching algorithm, the SeeBeyond Match Engine.

1.5 Terminology Changes

Some common terms used in e*Index 4.5.3 were changed in version 5.0. Table 1 outlines these changes.

Table 1 Modified Terminology

e*Index 4.5.3 Term	eIndex 5.0 Term
e*Index Global Identifier	eIndex Single Patient Identifier Composite Application
Unique Global Identifier (UID)	Enterprise-wide Unique Identifier (EUID)
e*Index Global Identifier GUI	Enterprise Data Manager (EDM)
Non-unique IDs	Auxiliary IDs

Table 1 Modified Terminology

e*Index 4.5.3 Term	eIndex 5.0 Term
Audit Trail	Transaction History
Configurable Query	Blocking Query

1.6 Related Documents

SeeBeyond has developed a suite of user's guides and related publications that are distributed in an electronic library. The following documents may provide information useful in creating your customized index. In addition, complete documentation of the eIndex Java API is provided in Javadoc format.

- *eIndex Single Patient Identifier Composite Application User's Guide*
- *eIndex Single Patient Identifier Composite Application Configuration Guide*
- *eIndex Single Patient Identifier Composite Application Reference Guide*
- *eIndex Enterprise Data Manager User's Guide*
- *Implementing the SeeBeyond Match Engine with eIndex Studio*
- *Implementing Ascential INTEGRITY with eIndex Studio*
- *eIndex Single Patient Identifier Composite Application Upgrade Guide*

1.7 SeeBeyond Web Site

The SeeBeyond Web site is your best source for up-to-the-minute product news and technical support information. The site's URL is:

<http://www.seebeyond.com>

1.8 SeeBeyond Documentation Feedback

We appreciate your feedback. Please send any comments or suggestions regarding this document to:

docfeedback@seebeyond.com

eIndex Single Patient Identifier Composite Application 5.0

This chapter provides a general overview of the changes between e*Index 4.5.3 and eIndex 5.0.

What's in This Chapter

- [Changes to the eIndex GUIs](#) on page 9
- [Changes to the eIndex Database](#) on page 15
- [Changes to the eGate Components for eIndex](#) on page 18

2.1 Changes to the eIndex GUIs

The greatest change to the eIndex GUI is the move to a web-based GUI. In addition, the e*Index Administrator and e*Index Security GUIs have been removed. Security functions are now handled by the Integration Server. Administrative functions are performed by modifying a set of configuration files located in the eIndex Project in the Enterprise Designer.

For complete information about the new Enterprise Data Manager GUI, see the *eIndex Enterprise Data Manager User's Guide*.

2.1.1 The eIndex Single Patient Identifier Composite Application GUI

The primary GUI for the eIndex Single Patient Identifier Composite Application, now known as the Enterprise Data Manager, has been redesigned and is accessed through your Web browser.

The Search Function

The search functions are similar between versions 4.5.3 and 5.0. In version 5.0, additional search types can be defined, and the phonetic search, alphanumeric search, and ID lookups now appear on separate windows.

Search Types

In 5.0, there are four types of search: Simple Person Lookup, Advanced Person Lookup (Alpha), Advanced Person Lookup (Phonetic), and EUID Comparison Lookup. Additional search types can be created as needed. The Simple Person Lookup page includes EUID lookups, local ID and system lookups, and SSN lookups. The Advanced Person Lookup (Alpha) replaces the Demographic Alphanumeric Search and incorporates address fields. The Advanced Person Lookup (Phonetic) replaces the Demographic Phonetic Search and also incorporates address fields. With the addition of address fields to these two types of searches, the Address Search function from 4.5.3 was removed.

General Search

The System Administrator can configure the Advanced Person Lookup (Alpha) to include any fields needed for alphanumeric searches or new search pages can be created that include any fields for searching. This replaces the General Search from version 4.5.3 (which included all fields). Like the General Search, the Advanced Person Lookup (Alpha) allows wildcard characters in the search criteria. The wild card characters allowed in the search have changed; the asterisk and question mark are no longer used, but a percent sign can be used to represent one or more unknown characters.

Alphanumeric Searches

Previously, Demographic Alphanumeric Searches were weighted; in eIndex 5.0, Advanced Person Lookup (Alpha) searches are not weighted by default (they can be configured to be weighted). With the removal of the LNEXCTRSRCH control key, you cannot enter a partial last name as search criteria. To duplicate this functionality, type the partial last name and add the wildcard character (%) to the end.

Search Results

The SEEMERGED or SEEDEACTIV control keys have been removed, changing the viewing options for merged and deactivated records in search results. Once a profile has been merged, it is no longer included in the search results set. Merged profiles can only be viewed through the Transaction History function. Deactivated profiles are always included in the search results set, but are not displayed in colored text to indicate the deactivated status. You can include the status field in the results list to differentiate deactivated profiles from active profiles.

Updating Records

e*Index 4.5.3 stored a single record for each member, which contained the information determined to be the most current and accurate information about the member. This record could be modified directly. eIndex 5.0 stores both the “single best record” (SBR) and each external system record for a member. eIndex evaluates the information in all system records for a member to determine the values for the SBR. The SBR can only be modified directly by users with the appropriate access permissions. When a system record is modified, the SBR is recalculated using user-defined logic.

Potential Duplicates

The Potential Duplicate function is now accessed through the Matching Review function. The Potential Duplicate search fields no longer include Source, but now include Status and Local ID. Previously, the Comparison function also provided the ability to resolve potential duplicate records. In the current version, they can only be resolved using the Matching Review function.

Transaction History

An audit trail is now known as a transaction history, and can be accessed through the History function. The search fields no longer include Person Category or Source. Previously a record's history was stored as complete images of each version in the history tables. In the current version, only the changes made to a record for each transaction are stored in the database. These changes are stored in the `sbyn_transaction` table.

Local Identifiers

The structure of local ID and system records has been changed. Previously, system and local ID pairs could be added directly to a member profile. In version 5.0, a system and local ID pair is added in the form of a system record, which also includes demographic data, addresses, telephone numbers, and so on.

Changing the status of system records has also changed. Previously, a system and local ID pair could be manually assigned a status of active, merged, or deactivated. In the current version, a system record cannot manually be assigned a merged status, but the record can be deactivated and reactivated. The current version provides the added ability to merge a system record from one member profile into a system record in the same or a different member profile.

Merging and Unmerging

The merge function has been expanded to allow merging of both member profiles and system records. The field level merge only applies to system records. During a member profile merge, the system records from the non-surviving profile are all transferred to the surviving profile. The SBR of the surviving profile is then recalculated based on the new system information. You may need to deactivate or merge system records in the surviving profile. The merge function can now only be accessed through the Potential Duplicate Search on the Matching Review page.

In previous versions, the Unmerge function was accessed through the main menu of e*Index. In version 5.0, the Unmerge function is accessed through the History Search function. You can view transactions in the History Search results list, and then select the merge transaction you want to unmerge. The merge history tree is also viewed through the record's transaction history. When you view a merge transaction, a before and after image of the surviving profile is displayed. Clicking "Unmerge" displays the profiles as they will appear after they are unmerged.

Assumed Matches

eIndex 5.0 provides a new function that allows you to search for and view a log of all assumed matches that were performed by eIndex. If you find that an assumed match was made in error, you can now reverse the match and create a new member profile containing the new information.

Comments

Pre-defined and system-generated comments are obsolete in version 5.0. When you add a comment to a member profile, you add it specifically to a system record or to the SBR, and you must enter a comment code that is unique for the member profile in order for all comments to appear in the SBR.

2.1.2 e*Index Administrator

With the removal of the e*Index Administrator GUI, several administrative functions are now being handled by the configuration files for eIndex. These files are located in the eIndex Project in the Enterprise Designer.

Table 2 Administrator Functions in Version 5.0

e*Index Administrator Component	5.0 Equivalent
Control keys	Several control keys are obsolete in the current version of eIndex, but some of the functions are handled in the configuration files. See Table 3 on page 13 for more information.
Configurable query	This is defined by the blocker query in the Candidate Select file.
Extensive searching	This is defined by the basic and blocker queries in the Candidate Select file. You need to modify each query used by eIndex in order for all types of searches to search the alias table.
Rule set files	Rule set files are now modified in a standard text editor and are stored on the Integration Server machine. This information is no longer stored in the database.
System maintenance	Systems are now added to the database during installation via SQL statements in the Systems database script. You can also add and modify system information using standard SQL.
Assigning a system to a region	eIndex 5.0 does not support region-specific security.
Predefined comments	eIndex 5.0 does not support predefined comments.
Non-unique ID type maintenance	Auxiliary (non-unique) IDs are added via SQL statements when creating the database. These statements are defined in the Create User Codes database script.
Zip Code maintenance	Zip codes are not validated in eIndex 5.0.

Table 2 Administrator Functions in Version 5.0

e*Index Administrator Component	5.0 Equivalent
System message maintenance	System message maintenance is obsolete in eIndex 5.0.
Display options for the GUI	Display options are defined in the Enterprise Data Manager file in the eIndex Project.
Address parsing rules	Address parsing rules are defined in the Match Field file in the eIndex Project.
Country-specific field formats	Field formats are defined in the Object Definition file and the Enterprise Data Manager file in the eIndex Project.
Search types and search labels	The types of searches available to the EDM are defined in the Enterprise Data Manager file. Group labels and field groupings for the different types of searches are also defined in this file.
Tabbed page labels	Page headings on the EDM are defined in the Enterprise Data Manager file.
Common maintenance tables	This information is loaded into the database when you install the eIndex tables. You can modify the Code List database script to customize this information. Once the common maintenance tables have been populated, you can modify the data using SQL statements.

Control Keys

Control keys are not used in eIndex 5.0. Most of the configuration is now handled in the configuration files provided in the eIndex Project. Control key functionality differences between version 4.5.3 and 5.0 are outlined in Table 3.

Table 3 Control Key Functions in Version 5.0

Control Key	5.0 Equivalent
ALLOWNUM	This is automatically enabled.
ALSRCHLMT	This is not configurable in eIndex 5.0, which sets a permanent limit of 1,000 on search results.
ASSMTCH	This is automatically enabled.
ATSRCHLMT	This is configured in the GUI definition section of the Enterprise Data Manager file.
AUDITONOFF	This control key is obsolete.
BLNKONUPDT	This is now configured by the clearFieldIndicator node in the systemPerson variable of the ProcessPerson Collaboration.
COUNTRY	This control key is obsolete.
DATEFRMT	This is configured in the dateformat element of the Object Definition file.

Table 3 Control Key Functions in Version 5.0

Control Key	5.0 Equivalent
DEBUGLVL	This is now specified in the implementation details of the Enterprise Data Manager file.
DEBUGSQL	This is not supported in eIndex 5.0.
DEMOSRCLMT	This is configured in the GUI definition section of the Enterprise Data Manager file.
DOBYREQ	This is not supported in eIndex 5.0. If the date is required, the year is also required.
DUPCHK	This is now handled by the update-mode element in the Threshold file in the eIndex Project.
ENCOUNTER	The encounters module is not supported in eIndex 5.0.
ENDTIME	This control key is obsolete.
EXTNSVSRCH	This is configured in the queries defined in the Candidate Select file.
LNEXCTRSRCH	This is not supported in eIndex 5.0, but you can use wildcard characters in alphanumeric searches to perform the same function.
MAXPROB	This control key is obsolete.
MIXEDCASE	All information can be entered in mixed-case format in eIndex 5.0, and phonetic searches are case-insensitive. Alphanumeric searches are case-sensitive, but name fields can be made case-insensitive by storing the standardized versions of the names on which you want to search.
PDSRCHLMT	This is configured in the GUI definition section of the Enterprise Data Manager file.
SEDEACTIV	All searches now automatically include deactivated records.
SEEMERGED	Searches no longer include merged records.
SEEMSGCODE	This control key is obsolete.
SHORTID	This control key is obsolete since all field lengths and most field requirements are configurable.
SMARTCARD	Smart card technology is not supported in eIndex 5.0.
SNDXSRCH	This control key is obsolete.
SRCHDOB	This control key is obsolete.
STARTTIME	This control key is obsolete.
THRESHOLD	This control key is obsolete.
UVAUDITLOG	This is configured in the GUI definition section of the Enterprise Data Manager file.

Configurable Query

The configurable queries define fields to block for matching and the combinations of fields allowed for a phonetic search. Previously, the configurable queries were modified

through e*Index Administrator, and the information was stored in the database. In version 5.0, the configurable queries (now called “blocking queries”) are customized in the Candidate Select file, and the information is stored in that file. eIndex 5.0 does not provide the ability to include constants in the “where” clause of the SQL statements, but it provides greater flexibility in choosing fields on which to block. You can also define a custom blocking query.

Extensive Searching

Extensive searching was previously defined in the configurable queries for matching and phonetic searches, and was defined by a control key for alphanumeric GUI searches. In version 5.0, it is defined by the queries contained in the Candidate Select file. By default, the blocking query and phonetic search are set up for extensive searching, and you can modify the query configuration if needed.

The Match String

The new query provides more flexibility in selecting fields on which to block. Previously, you could only select fields from the person table for the configurable query, and the fields included in the configurable query were the only fields you could include in the match string (the fields that are sent to the match engine). Now you can select any field for the blocking query and specify any field for the match string regardless of how the blocking query is defined.

INTEGRITY Rule Set Files

Rule set information is no longer stored in the database, making the Rule Set Maintenance function obsolete. The rule set files can be modified using any text editor (for Unix, make sure no end-of-line characters (^M) are included in the files). The files must be stored on the Integration Server machine and the required environment variables must be defined in the Integration Server properties.

2.1.3 e*Index Security

Security is now handled through the Integration Server, making the e*Index Security GUI obsolete. Security is still provided at the logon, function, and action levels, but user groups are no longer supported. For information about security user roles, see the *eIndex Single Patient Identifier Composite Application User’s Guide*. Event notification is no longer handled through eIndex, but can be handled through the e-mail eWay.

2.2 Changes to the eIndex Database

With both system records and the single best record (SBR) for each person being stored in eIndex, the basic structure of the database has been modified. This chapter describes the changes to the eIndex database between versions 4.5.3 and 5.0.

2.2.1 Overview

Several changes were made to the eIndex database for this release to accommodate the underlying data structure and the configurability of that structure. The database tables are based on the object structure defined in the Object Definition file of the eIndex Project and can be modified as needed. If you are upgrading from e*Index 4.5.3, you must use the predefined object and database structures. To see a diagram of the default database, see the *eIndex Single Patient Identifier Composite Application Reference Guide*.

2.2.2 Structural Changes

This section describes the database tables that were changed, removed, or are new for this release.

Modified Tables

Several tables are similar between releases 4.5.3 and 5.0, but have been modified slightly to accommodate data structure changes. Table 4 lists the 4.5.3 to 5.0 mapping of database tables. The structure of several of the tables listed has changed. For more information about the new database structure, see the *eIndex Single Patient Identifier Composite Application Reference Guide*.

Table 4 Table Mapping from Version 4.5.3 to 5.0

Data in this 4.5.3 table...	is stored in this 5.0 table...
ui_person	sbyn_personsbr and sbyn_person
ui_address	sbyn_addresssbr and sbyn_address
ui_alias	sbyn_aliassbr and sbyn_alias
ui_auxid	sbyn_auxidsbr and sbyn_auxid
ui_comment	sbyn_commentsbr and sbyn_comment
ui_phone	sbyn_phonesbr and sbyn_phone
ui_*_history	sbyn_transaction
ui_transaction	sbyn_transaction
ui_assumed_match	sbyn_assumedmatch
ui_aux_id_def	sbyn_user_codes
ui_duplic	sbyn_potentialduplicates
ui_facility	sbyn_systems
ui_local_id	sbyn_enterprise
ui_mrg_tran	sbyn_merge
ui_seq_no	sbyn_seq_table
stc_appl	sbyn_appl
stc_audit	sbyn_audit
stc_common_detail	sbyn_common_detail
stc_common_header	sbyn_common_header

History information is no longer stored as complete person records in the history database tables. This information is now stored in one table, `sbyn_transaction`, which stores a history of only the changes made in each transaction rather than a complete before image of each transaction.

New Tables

The following tables have been added for this release. The system tables store information about the local ID and system records for each system record and each SBR. The overwrite table stores information about fields that are locked for overwrite in any of the SBRs in the database.

- `sbyn_systemsbr`
- `sbyn_systemobject`
- `sbyn_overwrite`

Obsolete Tables

The structure of eIndex 5.0 simplifies the database, and several tables are now obsolete. Most of the information previously stored in these tables is now stored in the configuration files in the eIndex Project. The history tables have been consolidated into a single delta table, and the functions handled by both the security tables and the outbound event tables have been transferred to eGate. Rule set information is now only stored in the rule set files, and is no longer stored in the database. The following tables are obsolete:

Table 5 Obsolete Tables

Obsolete Tables	Reason
Rule set tables	Rule set information is only stored in the rule set files in version 5.0.
Configurable query tables	The blocking queries are defined in the Candidate Select file.
Country configuration tables	Some of this information is defined in the Enterprise Data Manager file. Address parsing is defined in the Match Field file.
Display configuration tables	Display configuration is defined in the Enterprise Data Manager file.
Case-insensitive search tables	This is handled through standardization of search fields (in the data structure and the Match Field file).
Security tables	Security is handled through the Integration Server.
Outbound queue tables	Outbound messages are published to a JMS Topic.

Table 5 Obsolete Tables

Obsolete Tables	Reason
ui_canned_msg	Predefined comments are no longer supported.
ui-config	Schema levels are no longer required for upgrades.
ui-control	Most of the control key functionality is handled through the Project configuration files.
ui_dept	This table is obsolete.
ui_message	eIndex 5.0 does not support modifying system messages.
ui_monthly_stat	Monthly statistics are not stored in eIndex 5.0.
ui_zip	A zip code list is not stored in version 5.0 (but zip code lists can be added to the sbyn_user_code table).

2.2.3 Reports

Reports are now provided through a Java command. The following daily reports are available: assumed match, potential duplicate, merge, unmerge, deactivated records, and update. Periodic activity reports are also available. You can modify your existing PL/SQL reports to create additional reports as needed, or you can use any ODBC-compliant report writer, such as Crystal Reports, to create new reports. For more information, see *Working with Reports for eIndex*.

2.3 Changes to the eGate Components for eIndex

The structure of the eGate components of eIndex have changed in accordance with the new structure of the SeeBeyond ICAN Suite. This chapter describes the changes to the e*Index Schema. For more information about general Schema component changes, see the *eGate Integrator Release Notes*.

2.3.1 Overview

eIndex 5.0 provides a sample Project that processes data in the same manner as the e*Index 4.5.3 sample schema. You can customize the new Project just as the 4.5.3 sample Schema could be customized. For complete information about eGate Projects, see the *eGate Integrator User's Guide*. For information about the eIndex Projects, see the *eIndex Single Patient Identifier Composite Application User's Guide*.

In eIndex 5.0 Collaborations, Java methods are used rather than Monk functions to customize how data is processed. In addition, a set of custom Java methods is generated for use in Business Processes for eInsight Integration. Broadcast messaging

has changed as well, with outbound messages being stored in a JMS Topic rather than the database.

2.3.2 Changes to the eIndex API

All e*Index 4.5.3 Monk API functions have been replaced with Java methods in version 5.0. Many of the eIndex classes and methods are dynamic, based on the defined object structure in the eIndex Project. The methods designed for use in Collaborations are provided in a method OTD. Additional methods are provided for integration with eInsight Business Processes.

Updated Functions

Table 6 lists Monk functions from version 4.5.3 along with the Java functions that replaced them in version 5.0.

Table 6 Java Method Equivalents to Monk Functions

4.5.3 Functions	Corresponding 5.0 Function	Notes
ui-deactivate-local-id	deactivateSystemRecord	
ui-delete-address	delete<child>	<child> indicates the type of child object to drop.
ui-delete-aux-id	delete<child>	<child> indicates the type of child object to drop.
ui-get-id-system	getLIDs getLIDsByStatus	getLIDsByStatus allows you to specify the status of the records to retrieve.
ui-get-alias	get<child>	<child> indicates the type of child object to find.
ui-get-aux-id	get<child>	<child> indicates the type of child object to find.
ui-get-person	getEnterpriseRecordByEUID getSystemRecordsByEUID getSystemRecordsByEUIDStatus	The new functions allow you to retrieve either the enterprise record or the system record. Searching by status is an option for system records.
ui-get-uid	getEUID	
ui-insert-address	get<child>[i]	<child> indicates the type of child object to add. The "i" indicates the occurrence of the child object array to which the child object is added.
ui-insert-alias	get<child>[i]	See ui-insert-address .
ui-insert-aux-id	get<child>[i]	See ui-insert-address .

Table 6 Java Method Equivalents to Monk Functions

4.5.3 Functions	Corresponding 5.0 Function	Notes
ui-insert-local-id	addSystemRecord	In version 4.5.3, only the local ID and system were added to the record; in 5.0, the complete system record is added to the enterprise record.
ui-local-id-merge	mergeSystemRecord	In version 4.5.3, this results in two enterprise records being merged; in 5.0, only the system records are merged.
ui-lookup-local-id	lookupLIDs	The lookupLID search includes the status of the local ID.
ui-merge	mergeEnterpriseRecord	
ui-process-person	executeMatch	Unlike ui-process-person , executeMatch cannot be modified.
ui-update-person	updateEnterpriseRecord updateSystemRecord	The new functions allow you to update either the enterprise record or the system record.

New Functions

The following methods in the method OTD are unique to eIndex 5.0 and do not have corresponding functions in version 4.5.3. Additional methods are generated for each object defined in the Object Definition file.

- activateEnterpriseRecord
- deactivateEnterpriseRecord
- getEnterpriseRecordByLID
- getSBR
- getSystemRecord
- searchBlock
- searchExact
- searchPhonetic

Obsolete Functions

The following functions from version 4.5.3 are obsolete in version 5.0, due to either processing differences or data structure differences. Some of these functions are replaced by the dynamic API functions in the parent class, which are described in the *eIndex Single Patient Identifier Composite Application Reference Guide*. These include the functions for retrieving, adding, or updating child objects.

- db-get-error-str
- ui-poll-startup

- make-connection-handle
- ui-address-search-close
- ui-address-search-next
- ui-commit-transaction
- ui-config
- ui-delete-queue-msg
- ui-delete-unresolved-duplicates
- ui-dequeue
- ui-exists-aux-id
- ui-get-all-local-id
- ui-get-assumed-match-enabled
- ui-get-db-date-time
- ui-get-demographic-changed
- ui-get-dupchk-enabled
- ui-get-error-string
- ui-get-local-id
- ui-get-transaction-date-time
- ui-get-vip
- ui-insert-assumed-match
- ui-insert-person
- ui-local-id-status
- ui-lookup-address-id
- ui-lookup
- ui-poll
- ui-poll-neg-ack
- ui-poll-pos-ack
- ui-process-address
- ui-process-phone
- ui-rollback-transaction
- ui-search-close
- ui-search-get-exact-match-score
- ui-search-get-exact-match-uid
- ui-search-insert-duplicate
- ui-search-local-id
- ui-search-open
- ui-set-dup-threshold
- ui-set-match-threshold
- ui-set-queue-id
- ui-start-transaction
- ui-stdver-conn-estab
- ui-stdver-conn-shutdown
- ui-stdver-conn-ver
- ui-stdver-data-exchg-stub
- ui-stdver-init
- ui-stdver-neg-ack
- ui-stdver-pos-ack
- ui-stdver-proc-outgoing
- ui-stdver-proc-outgoing-stub
- ui-stdver-shutdown
- ui-stdver-startup
- ui-update-address
- ui-update-aux-id

2.3.3 eInsight Integration

A new feature provided by eIndex 5.0 is the ability to integrate eIndex with eVision and eInsight. The eIndex Project includes a set of Java methods that can be incorporated into eInsight Business Processes and in eVision Web services. These methods are a subset of those defined for use in the eIndex Collaboration, and provide the ability to view, retrieve, and match information in the eIndex database.

2.3.4 Outbound Queue

eIndex 5.0 implements a new method of transmitting data back to external systems. Previously, outbound messages were written to a database table (the “outbound queue”) from which the Polling eWay retrieved messages to transmit. In the current version, eIndex includes an outbound OTD based on the object structure defined in the

Object Definition file. This OTD is used for distributing information that has been added or updated in the eIndex database to external systems. This OTD includes the objects and fields defined in the Object Definition file plus additional SBR information (such as the create date and create user) and additional system object information (such as the local ID and system code). If you plan to use this OTD to make eIndex data available to external systems, you must define a JMS Topic in the eIndex Connectivity Map to which eIndex can publish the outbound transactions.

What's New in This Release

This chapter summarizes new features and changes in eIndex release 5.0.5.

What's in This Chapter

- [Enterprise Data Manager History Search](#) on page 23
- [Potential Duplicates](#) on page 23
- [Configurable Local ID Labels](#) on page 24
- [Merge Changes](#) on page 24
- [Query Manager Changes](#) on page 24
- [Standardization Engine Changes](#) on page 24
- [Match Engine Changes](#) on page 24

1.1 Enterprise Data Manager History Search

The ability to search by local ID and system was added to the History Search page of the Enterprise Data Manager (EDM). Two new fields, System and Local ID, allow you to perform the new search. If a matching record is found, the EUID field is populated, allowing you to search for the transaction history of that EUID. For more information about the new search function, see “Viewing a Transaction History” in chapter 4 of the *eIndex Enterprise Data Manager User's Guide*.

1.2 Potential Duplicates

Searching

The ability to search by local IDs on the Potential Duplicate Search page of the EDM was enhanced so the local IDs that already existed in the master index prior to the potential duplicate listing are found. Previously only the local IDs of the record that caused the potential duplicate listing were found.

Evaluating

Potential duplicate handling in the EDM modified to re-evaluate potential duplicates when key fields in child objects are modified (when running in pessimistic update mode only). Previously, changes to child objects did not trigger potential duplicate re-evaluation, regardless of key fields or update mode.

1.3 Configurable Local ID Labels

The local ID field, column, and screen area labels on the EDM are now configurable, and can be changed to a name more appropriate for your organization. The labels are configured in the Enterprise Data Manager configuration file using two new XML tags, **local-id** and **local-id-header**. For more information, see "Defining Local ID Labels" in chapter 9 of the *eIndex Single Patient Identifier Configuration Guide*.

1.4 Merge Changes

The merge functionality was enhanced to better handle instances where a record is merged and unmerged several times.

1.5 Query Manager Changes

The Query Manager was enhanced to allow custom query builders to be written using combinations of nested AND and OR operations. Previously, only AND operations were supported. The default blocker query still joins each field in a block by an AND operator in the "where" clause, and joins each block by a UNION operator.

1.6 Standardization Engine Changes

The standardization engine was enhanced to provide improved normalization of first and middle names that contain hyphens.

1.7 Match Engine Changes

The match engine was modified to regenerate matching weights for a record when the key fields of the record's child objects are modified. This allows the potential duplicate re-evaluation described under [Evaluating](#) on page 24.