

SeeBeyond ICAN Suite

Working with Reports for eIndex

Release 5.0.5



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Contents

Chapter 1

Introduction	5
About Reports	5
About This Document	6
What's in This Document	6
Scope	6
Intended Audience	6
Document Conventions	6
Screenshots	7
Related Documents	7
SeeBeyond Web Site	7
SeeBeyond Documentation Feedback	8

Chapter 2

About eIndex Reports	9
Report Overview	9
About Production Reports	9
About Activity Reports	9
Configuring Reports	10
Creating Custom Reports	10
Standard Production Reports	10
Assumed Match Report	10
Deactivated Record Report	11
Potential Duplicate Report	11
Merge Transaction Report	11
UnMerge Transaction Report	11
Update Report	12
Standard Activity Reports	12
Weekly Activity Report	12
Monthly Activity Report	13
Yearly Activity Report	13

Chapter 3

Running Reports	14
Before you Begin	14
Setting up the Reports	14
Copy the Generated eIndex Client File	14
Set up the Environment	15
Configuring the Reports	15
Define the Report Configuration	15
Configure Each Report	16
Running the Reports	18

Appendix A

Sample Production Reports	20
Production Reports	20
Assumed Match Report	20
Potential Duplicate Report	22
Deactivated Record Report	24
Merge Transaction Report	26
Unmerge Transaction Report	28
Update Report	30
Activity Reports	32
Weekly Activity Report	32
Monthly Activity Report	34
Yearly Activity Report	36
Index	38

Introduction

This chapter provides an overview of this guide and the conventions used throughout, as well as a list of supporting documents and information about using this guide.

What's in This Chapter

- [About Reports](#) on page 5
- [About This Document](#) on page 6
- [Related Documents](#) on page 7
- [SeeBeyond Web Site](#) on page 7
- [SeeBeyond Documentation Feedback](#) on page 8

1.1 About Reports

The SeeBeyond® eIndex™ Single Patient Identifier Composite Application (eIndex) provides a set of production and activity reports that are generated using the *report client*. The production reports provide information about the current state of the data in eIndex, helping you monitor stored data and determine how that data needs to be updated. Report information also helps verify that the matching logic and weight thresholds are defined correctly. Activity reports provide statistical information for eIndex transactions over specific periods of time.

The eIndex reports are written in Java and run as a Java command. In order to run these reports, you must have the Java Runtime Environment (JRE) 1.4.1 or later installed on the machine where the report files reside. For additional reporting needs, the database is accessible using any commercially available ODBC-compliant reporting tool. You can also define reports using Java or the PL/SQL scripting language.

1.2 About This Document

This guide provides comprehensive information on working with the reports generated for eIndex. These reports help you monitor the integrity of the eIndex database and to find patterns in automatic matching and potential duplication. This guide explains how to run the standard reports.

1.2.1. What's in This Document

This guide is divided into three chapters and one appendix that cover the topics shown below.

- **Chapter 1 “Introduction”** gives a general preview of this document—its purpose, scope, and organization—and provides sources of additional information.
- **Chapter 2 “About eIndex Reports”** gives an overview of the reports that are generated by default for eIndex.
- **Chapter 3 “Running Reports”** gives instructions for running the standard reports provided with eIndex.
- **Appendix A “Sample Production Reports”** gives a sample of each report provided with eIndex.

1.2.2 Scope

This guide provides step-by-step instructions for working with the standard reports provided with eIndex. It includes navigational information, functional instructions, and background information where required. This guide does not include information or instructions on using eIndex, the Enterprise Data Manager (EDM), or eGate Integrator components. These topics are covered in the appropriate user guide (for more information, see [“Related Documents” on page 7](#)).

1.2.3. Intended Audience

Any user who will customize, run, or analyze any of the standard reports should read this guide. A good knowledge of eIndex is helpful in understanding this guide. It is presumed that the reader of this guide is familiar with the Oracle database administration, PL/SQL, and the eIndex database structure. The intended reader must have a good working knowledge of his or her company's current business processes and information system (IS) setup.

1.2.4 Document Conventions

The following conventions are observed throughout this document.

Table 1 Document Conventions

Text	Convention	Example
Button, file, icon, parameter, variable, method, menu, and object names.	Bold text	<ul style="list-style-type: none"> ▪ Click OK to save and close. ▪ From the File menu, select Exit. ▪ Select the logicalhost.exe file. ▪ Enter the timeout value. ▪ Use the getClassname() method. ▪ Configure the Inbound File eWay.
Command line arguments and code samples	Fixed font. Variables are shown in bold italic .	<code>bootstrap -p password</code>
Hypertext links	Blue text	http://www.seebeyond.com

1.2.5 Screenshots

Depending on what products you have installed, and how they are configured, the screenshots in this document may differ from what you see on your system.

1.3 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 Enterprise Data Manager User's Guide*
- *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*
- *Implementing the SeeBeyond Match Engine with eIndex*
- *Implementing Ascential INTEGRITY with eIndex*
- *eGate Integrator User's Guide*

1.4 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>

1.5 SeeBeyond Documentation Feedback

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

docfeedback@seebeyond.com

About eIndex Reports

This chapter provides an overview of the activity and production reports that are provided with eIndex.

What's in This Chapter

- [Report Overview](#) on page 9
- [Standard Production Reports](#) on page 10
- [Standard Activity Reports](#) on page 12

2.1 Report Overview

2.1.1 About Production Reports

Production reports should be run daily and provide information about the transactions that are processed through the eIndex database. These reports provide lists of potential duplicate records, merge transactions, unmerge transactions, assumed matches, updates, and deactivated records for a specified time period. The information you find in these reports helps you analyze your matching threshold configuration, and provides valuable information about how data is being processed in your current configuration. In addition to running the production reports daily, you should run them against any data that has been loaded from existing systems into the eIndex database in batch format.

2.1.2 About Activity Reports

Activity reports should be run weekly, monthly, and yearly to obtain statistical data about the transactions that are processed through the eIndex database. These reports give the number of each type of transaction performed for the specified week, month, or year. They also provide cumulative information for the week to date, month to date, or year to date. The information you find in these reports helps you analyze your matching threshold configuration and the condition of your data by giving you the number of potential duplicates created, the number of assumed matches, and so on.

2.1.3 Configuring Reports

The report files are configured by an XML file, `eIndexPersonReport.xml`, located in the report home directory in the `config\eIndex` subdirectory. The configuration file allows you to specify which reports to run, the time period of the transactions to include in each report, and the name and location of the report files. You can also define various report details, such as the name of each report, which fields to include, and the names and sizes of the report columns. Most of these changes should only need to be made one time, before you first run the reports.

2.1.4 Creating Custom Reports

If the standard reports provided with eIndex do not provide you with all the information you need, you can create custom reports. You can create custom reports using PL/SQL or Java (using the “lookup” methods in the `MasterController` class). You can also access the database using any ODBC-compliant report writer (such as Crystal Reports), providing you with the flexibility to report on any information contained in the eIndex database.

2.2 Standard Production Reports

This section describes each standard production report provided with eIndex. The standard production reports help you to monitor and analyze the data in the eIndex database. You can view information about the transactions processed and about any potential duplicates or assumed matches that result from these transactions.

Each report has certain fields that are always displayed and certain fields that are configured to display. You can customize the configured fields that appear on each report as needed. By default, all reports are configured to include the first name, last name, date of birth, SSN, and address line 1 and 2 fields. The fields that are always displayed are described for each report in the following sections.

Production reports can be run for the current day, the previous day, or for a date range you specify. If you run your daily reports in the evening, you should run the current day's reports. If you run your daily reports in the morning, you should run the previous day's reports.

2.2.1 Assumed Match Report

This report displays information about any profiles that were automatically updated by incoming data during the specified time period. The information in this report, in combination with data from the potential duplicate reports, helps you determine if your matching threshold for assumed matches is accurate. You should review this report daily to ensure that no assumed matches were made in error. eIndex provides the ability to undo an assumed match that was made in error.

The assumed match report always includes the following information about the profile that was updated: enterprise-wide unique identifier (EUID), system code, local ID, and

matching weight. The report provides the same information for the incoming record that updated the existing record with the exception of the EUID. You can configure the report to include any additional fields from the defined object structure (in the Object Definition file in the eIndex Project). For a sample of the assumed match report, see [“Assumed Match Report” on page 20](#).

2.2.2 Deactivated Record Report

This report displays a list of all records that were deactivated during the specified time period. Review this report daily to ensure that no profiles were deactivated in error. eIndex provides the ability to reactivate any deactivated profile. The deactivated record report always includes the EUID of the deactivated profile, and you can configure the report to include any additional fields from the defined object structure (in the Object Definition file in the eIndex Project). For a sample of this report, see [“Deactivated Record Report” on page 24](#).

2.2.3 Potential Duplicate Report

This report displays information about member profiles that were marked as potential duplicates of one another during the specified time period. The information provided on this report can help you determine whether the matching threshold and the duplicate threshold are configured accurately. The information for each profile on the potential duplicate report always includes the EUIDs of both profiles, the system code, and the matching weight between each potential duplicate pair. You can configure the report to include any additional fields from the defined object structure (in the Object Definition file in the eIndex Project).

If same system matching is not enabled and two duplicate profiles from the same system on this report have a matching weight above the match threshold, it is an indication that the profiles most likely represent the same person. Review the potential duplicate report daily to determine if two profiles need to be merged or if they can be resolved. For a sample of this report, see [“Potential Duplicate Report” on page 22](#).

2.2.4 Merge Transaction Report

This report displays a list of all records that were merged during the specified time period. Review this report daily to ensure that no profiles were merged in error. eIndex provides the ability to unmerge any merged profiles. The merge transaction report always includes the EUID of each record affected by the merge. You can also configure the report to include any additional fields from the defined object structure (in the Object Definition file in the eIndex Project). For a sample of this report, see [“Merge Transaction Report” on page 26](#).

2.2.5 UnMerge Transaction Report

This report displays a list of all records that were unmerged during the specified time period. This report always includes the EUIDs of both records involved in the unmerge transaction, and you can configure the report to include any additional fields from the defined object structure (in the Object Definition file in the eIndex Project). The

unmerge transaction report is sorted by the login ID of the users who performed the unmerge transactions. For a sample of this report, see [“Unmerge Transaction Report” on page 28](#).

2.2.6 Update Report

This report displays member profiles whose information was updated on the day designated by the report. Review this report daily to verify the updates made in a given day. This report can help explain why a resolved potential duplicate listing was reinstated to the potential duplicate list. The update report always includes the following information about the profile that was updated: EUID, system code, and local ID. You can configure the report to include any additional fields from the defined object structure (in the Object Definition file in the eIndex Project). For a sample of the update report, see [“Update Report” on page 30](#).

2.3 Standard Activity Reports

This section describes each standard activity report provided with eIndex. These reports help you to monitor and analyze the transactions in the eIndex database by providing statistical data about each transaction type. Unlike the production reports, the information displayed on the activity reports is not configurable. The information displayed on these reports is described for each report in the following sections. Activity reports can be run for any week, month, or year you specify.

2.3.1 Weekly Activity Report

This report displays a summary of transactions that occurred against the database on each day for the specified calendar week (always Sunday through Saturday). The information provided in this summary includes the number of each of the following transactions performed each day.

- Add
- Update
- EUID Deactivate
- EUID Merge
- EUID Unmerge
- LID Merge
- LID Unmerge
- LID Transfer

For a sample of the weekly activity report, see [“Weekly Activity Report” on page 32](#).

2.3.2 Monthly Activity Report

This report displays a summary of transactions that occurred against the database during the specified month. You can run this report for any calendar month. The information provided in this summary includes the number of each of the following transactions that were performed for the month:

- Add
- EUID Deactivate
- EUID Merge
- EUID Unmerge
- LID Merge
- LID Unmerge
- Unresolved Potential Duplicates
- Resolved Potential Duplicates

For a sample of the monthly activity report, see [“Monthly Activity Report” on page 34](#).

2.3.3 Yearly Activity Report

This report displays a summary of transactions that occurred against the database for the specified calendar year. You can run this report for any calendar year. The information provided in this report includes a summary of each transaction listed for the monthly activity report above. For a sample of the yearly activity report, see [“Yearly Activity Report” on page 36](#).

Running Reports

This chapter provides information about configuring and running the production and activity reports for eIndex.

What's in This Chapter

- **Before you Begin** on page 14
- **Setting up the Reports** on page 14
- **Configuring the Reports** on page 15
- **Running the Reports** on page 18

3.1 Before you Begin

Before you begin working with the reports, make sure they have been installed as described in chapter 3 of the *eIndex Single Patient Identifier Composite Application User's Guide*. You must also have the JRE or Java Software Development Kit (SDK) version 1.4.1 or later installed on the machine from which the reports are run. Finally, be sure you have configured the database connection in the eIndex Project, either through an Oracle eWay or a JDBC connection pool in the Integration Server. This is also described in the *eIndex Single Patient Identifier Composite Application User's Guide*.

3.2 Setting up the Reports

Before running the eIndex reports, you must set up the report environment.

3.2.1 Copy the Generated eIndex Client File

The reports rely on one file, **stc_eindex_client.jar**, that is generated in the eIndex Project in the Enterprise Designer. You need to export this file to the reports directory. If the Project is regenerated at any time, the file should be exported to the reports directory again when the generate process is complete,

To copy the generated file

- 1 In the Project Explorer of Enterprise Designer, expand the eIndex server Project.

- 2 Select, and then right click, the file **Person_stc_eindex_client.jar**.
- 3 On the context menu that appears, click **Export**.

The **Save** dialog appears.

- 4 In the **Save In** field, enter, or navigate to, the **lib** subdirectory in the reports home directory.
- 5 Click **Save**.
- 6 In Windows Explorer, navigate to the **lib** subdirectory and rename the file to **stc_eindex_client.jar**.

3.2.2 Set up the Environment

If the report files are not located on the SeeBeyond Integration Server machine, you must have the JRE 1.4.1 or later installed on the machine where the files reside. Make sure you set up all Java variables as specified in the Java documentation. In addition, create one variable, `JAVA_HOME`, and set it to the home directory of the JRE installation.

If you will run the reports using the Java command and not the supplied batch file, you need to modify the `CLASSPATH` variable before running the reports for the first time (the batch file sets the `CLASSPATH` for the instance each time it is run). Add the absolute path and filename of all of the files in the **lib** subdirectory of the reports home directory to the `CLASSPATH` variable.

3.3 Configuring the Reports

Before running any reports, you must customize the XML configuration file. This file is located in the reports directory in the eIndex subdirectory and is named **eIndexPersonReport.xml**. The default eIndex XML file can be modified for use with your production and activity reports. Report configuration includes two steps: defining the overall report configuration and configuring the individual reports.

3.3.1 Define the Report Configuration

The first section of the report configuration file is indicated by the **DOCTYPE** and the **report** tags and tells the report client how to connect to the Integration Server, which application to run the reports against, and where to output the report files. Modify any of the elements described in Table 2 to define the general report configuration.

Table 2 General Report Configuration Elements

Element	Description
DOCTYPE	The type of document being generated. Do not change this value.

Table 2 General Report Configuration Elements

Element	Description
SYSTEM	The location of the DTD file for the reports. By default, this file is named report.dtd , and is located in the config directory. You should not need to modify this attribute unless you move report.dtd .
appserver	The JNDI address for the Integration Server. This must be in the format java://<hostname>:<port> , where <hostname> is the name of the server for the IS and <port> is the JNDI port number. (The port number is found on the Integration Server Properties window of the Enterprise Designer in the Integration Server Configuration folder. It is the value of the Initial JNDI Port property).
application	The name of the primary object used by the eIndex application. For eIndex, this is "Person".
output-folder	The location in which the generated reports will be placed. If an output directory is specified in the command line, that directory overrides the one specified here. If the output directory already exists, the report client issues a warning that any existing report files will be overwritten and gives you the option of cancelling the reports.

3.3.2 Configure Each Report

A configuration section is defined for each of the five report templates. Use these sections to configure each report to display information as you want to view it. You can also specify which reports to run.

To configure individual reports

For each report, make the following modifications before running the reports. Each element or attribute mentioned in the following instructions is defined in Table 3. There are five stanzas for you to modify, one for each report.

- 1 In the **eIndexPersonReport.xml** file, scroll to the **report** element.
- 2 Name the report in the report **name** attribute.
- 3 Specify whether or not to run the report in the **enable** element.
- 4 Define the name of the output file in the **output-file** element.
- 5 Specify a time period for the report by modifying the **type** element and, optionally, the **from-date** and **to-date** elements.
- 6 Define the fields to include on the report by modifying the elements in the **fields** element.
- 7 When you have finished configuring each report, save and close the file.

Table 3 Individual Report Configuration Elements

Element	Description
report	Defines each report run by the batch file. Each report is defined by a report element.
name	The descriptive name of the report. This can be any string, and will appear as the title in the specified report.
template	<p>The template to use for the type of report being generated. You should not need to modify this element, but you can specify any of the following templates.</p> <ul style="list-style-type: none"> ▪ Assumed Match ▪ Potential Duplicate ▪ Deactivated ▪ Merged ▪ Unmerged ▪ Update ▪ Weekly Activity ▪ Monthly Activity ▪ Yearly Activity
enable	Specifies whether to run the report for the current run. Specify “true” to run the report; specify “false” to disable the report. This option allows you to run one report at a time if preferred.
output-file	The name of the file generated by the report client . This file is created in the output directory defined earlier in the file or in the output directory specified in the command line (the command line output directory overrides the configuration file output directory).
criteria/dates	Defines the date range for the report.
type	<p>Indicates the type of date range to use for the report. Specify “today” to report on transactions with today’s date; specify “yesterday” to report on transactions with yesterday’s date; or specify “range” to enter a specific range of dates. If you specify “range”, you must enter the date range in the from-date and to-date elements.</p> <p><i>Note: If you enter a type of “today” or “yesterday” and you enter a date range, only the type will be used. For the activity reports, entering “today” runs the report for the current week, month, or year. Entering “yesterday” only runs the previous week’s report if yesterday was a Saturday.</i></p>

Table 3 Individual Report Configuration Elements

Element	Description
from-date	The starting date when using a date range for the report. Enter the starting date for the report transactions in YYYYMMDD format. If you enter a date in this element, you must enter a later date in the to-date element and specify “range” in the type element. <i>Note: For the activity reports, you can enter the range for the week, month, or year (depending on the type of activity report) on which you want to report. If the dates you specify do not fall within one calendar week, month, or year, the report client creates a report for the calendar week, month, or year containing the from-date and ignores the to-date value.</i>
to-date	The ending date when using a date range for the report. Enter the ending date for the report in YYYYMMDD format.
fields/field	A list of fields to display on the report in addition to those that are displayed automatically. This element should be empty for the activity reports. If a list of fields is supplied for these reports, it is ignored.
path	The ePath to a field you want to include in the report. For more information about ePaths, see “Field Notations” in the <i>eIndex Single Patient Identifier Composite Application User’s Guide</i> . <i>Note: You cannot use the asterisk option in the ePaths you specify here.</i>
label	The column label for the specified field in the report.
width	The width of the column for the specified field in the report. If a field value is larger than the width specified, that value will be truncated in the report.

3.4 Running the Reports

Once you have configured the reports, you can run them by either running the batch file provided with the reports or using the Java command.

Note: The Integration Server must be running in order to generate the reports.

To run the reports using the batch file

- 1 From the command line, navigate to the location of the report files.
- 2 Type the following all on one line:

```
report.bat -f <config_file> -d <output_directory>
```

where

- ♦ <config_file> is the name of the report configuration file to use.

- ♦ **<output_directory>** is the location to which the reports will be written. (This value overwrites the value specified in the configuration file. If this option is not specified, the configuration file value is used.)

Note: The *report.bat* file must in the reports home directory at the same level as the *lib* and *config* subdirectories in order for the environment variables to be set up correctly.

- 3 To view the reports, navigate to the location you specified as your output path, and open the files in any text editor.

To run the reports using a Java command

Important: Before running the reports for the first time, set up the environment variables as described in [“Set up the Environment” on page 15](#).

- 1 At the command prompt, type the following all on one line:

```
java com.stc.eindex.report.ReportClient -f <config_file>  
-d <output_directory>
```

where

- ♦ **<config_file>** is the name of the report configuration file to use.
- ♦ **<output_directory>** is the location to which the reports will be written. (This value overwrites the value specified in the configuration file. If this option is not specified, the configuration file value is used.)

Note: An additional option, *-h*, can be used to obtain help information for the report client.

- 2 To view the reports, navigate to the location you specified as your output path, and open the files in any text editor.

Appendix A

Sample Production Reports

This appendix shows samples of each report provided with eIndex. The sample reports were created using the default configuration with only the title of the reports modified.

- **Production Reports** on page 20
- **Activity Reports** on page 32

A.1 Production Reports

This section describes and shows samples of each of the production reports provided with eIndex.

A.1.1 Assumed Match Report

The assumed match report lists each transaction that occurred in the specified time period in which eIndex automatically merged two records because their matching weight fell above the match threshold. Each transaction consists of two lines; the first line is the existing record in the eIndex database that was updated by the incoming message, and the second line is the system record that updated the existing record. The sample on the following page illustrates the report in its default configuration, which includes the following information:

- SystemCode (for the existing record only)
- Local Id (for the existing record only)
- Weight (this appears only in the first line for each transaction)
- EUID (for the existing record only)
- First Name
- Last Name
- SSN
- DOB
- AddressLine1
- AddressLine2

You can configure this report to display any of the fields in the object structure defined in the Object Definition file.

Assumed Match
ASSUMED MATCH REPORT FOR DECEMBER 12, 2003

SystemCode	Local Id	Weight	EUID	First Name	Last Name	SSN	DOB	AddressLine1	AddressLine2
WHC	2324809	50.0	0000001007	JOSEPH	WARDELL	888447477	1958-12-06		
				JOSEPH	WARDELL	888447477	1958-12-06	1401WAYFIELD ROAD	
WHC	6579809	50.0	0000001000	BETH	WARNER	555444777	1968-12-14	1330 BLOSSOM STREET	
				BETH	WARNER	555444777	1968-12-14	32871 SHORELINE DRIVE SUITE 15	
WHC	2394809	45.0	0000001006	BETH	WARDELL		1972-12-06		
				BETH	WARDELL	555447477	1972-12-06	12903 SHORELINE DRIVE	
CBMC	997414109	45.0	0000001006	BETH	WARDELL	555447477	1972-12-06	12903 SHORELINE DRIVE	
				LIZBETH	WARDELL		1972-12-06	12903 SHORELINE DRIVE	
SLH	98648109	38.437	0000001004	ELIZABETH	WARREN		1960-05-31		
				ELIZABETH	WARREN		1960-05-14	23487 WAYFIELD ROAD	BUILDING 10
WHC	2952249	30.267	0000001002	ELIZA	WARNER	555444477	1976-12-06	2347 FLOWER STREET	
				ELIZA	WARNER		1976-02-06		
CBMC	558497842	45.0	0000001101	MARCUS	WARING	555444477	1954-01-31	1449 PAULA AVENUE	
				MARCUS	WARING		1954-01-31	1449 PAULA AVENUE	
SLH	13422245	50.0	0000001130	GEOFF	MILLER	224442222	1974-06-15	12129 MARTINDALE RD	APT. 5
				GEOFF	MILLER	224442222	1974-06-15	12129 MARTINDALE RD	

A.1.2 Potential Duplicate Report

The potential duplicate report lists each record pair that were listed as potential duplicate of each other during the specified time frame. These records have matching weight above the duplicate threshold, and, in some cases, above the match threshold. Each transaction consists of two lines in the report. The first line is the record that already existed in the database, and the second line is the record that caused the potential duplicate listing.

The sample on the following page illustrates the report in its default configuration, which includes the following information:

- SystemCode (this appears only on the first line for each transaction)
- Weight (this appears only on the first line for each transaction)
- EUID
- First Name
- Last Name
- SSN
- DOB
- AddressLine1
- AddressLine2

You can configure this report to display any of the fields in the object structure defined in the Object Definition file.

Potential Duplicate
POTENTIAL DUPLICATE REPORT FOR DECEMBER 12, 2003

SystemCode	Weight	EUID	First Name	Last Name	SSN	DOB	AddressLine1	AddressLine2
WHC	45.0	0000001017	LIZBETH	WARRIN	1965-02-06		21109 SHORELINE DRIVE	SUITE 12
		0000001009	LIZ	WARRIN	1965-02-06		21009 SHORELINE DRIVE	SUITE 12
SLH	45.0	0000001018	LIZ	WARES		1965-05-31		
		0000001010	ELIZABETH	WARES	1965-05-31			
CBMC	29.0625	0000001011	LIZ	WARNER		1976-12-16	21347 FLOWER STREET	
		0000001000	BETH	WARNER	555444777	1968-12-14	1330 BLOSSOM STREET	
CBMC	26.25	0000001001	MARCUS	WARING	555444555	1960-05-14	1492 WAYFIELD ROAD	APT. 12
		0000001005	MARCUS	WARING		1960-12-14		
CBMC	26.25	0000001011	LIZ	WARNER		1976-12-16	21347 FLOWER STREET	
		0000001002	ELIZA	WARNER	555444477	1976-02-06	2347 FLOWER STREET	
WHC	21.66666	0000001002	ELIZA	WARNER	555444477	1976-02-06	2347 FLOWER STREET	
		0000001000	BETH	WARNER	555444777	1968-12-14	1330 BLOSSOM STREET	
SLH	18.145834	0000001004	ELIZABETH	WARREN		1960-05-14	23487 WAYFIELD ROAD	BUILDING 10
		0000001009	LIZ	WARRIN		1965-02-06	21009 SHORELINE DRIVE	SUITE 12
WHC	18.145834	0000001017	LIZBETH	WARRIN		1965-02-06	21109 SHORELINE DRIVE	SUITE 12
		0000001004	ELIZABETH	WARREN		1960-05-14	23487 WAYFIELD ROAD	BUILDING 10

A.1.3 Deactivated Record Report

The deactivated record report lists each transaction in which a record was deactivated and that occurred in the specified time period. Each transaction consists of one line in the report. The sample on the following page illustrates the report in its default configuration, which includes the following information:

- EUID
- First Name
- Last Name
- SSN
- DOB
- AddressLine1
- AddressLine2

You can configure this report to display any of the fields in the object structure defined in the Object Definition file.

Deactivated
DEACTIVATED RECORD REPORT FOR DECEMBER 12, 2003

EUID	First Name	Last Name	SSN	DOB	AddressLine1	AddressLine2
1000154489	ELIZABETH	MILLER	555775555	1966-06-06	13887 MARTINDALE ROAD	APT. 101
1000048897	VICTORIA	WARING		1943-08-14	234 FLOWER STREET	
1000000024	MARTIN	WARDEN	447744774	1978-01-24	2111 SONORA AVENUE	UNIT 5
1000124800	SARAH	WARINGTON	112211221	1958-09-11		
1000130054	BETHANY	MARTIN			121 LAKE STREET	
1000004577	BERT	WARNER		1932-05-02		
1000025487	TONIA	FLEMING	115511551	1950-12-13	13332 RIVERSIDE	APT. 511
1000058878	GREGORY	TORANCE	444554444		5515 JONES STREET	

A.1.4 Merge Transaction Report

The merge transaction report lists each merge transaction that occurred in the specified time period. Each transaction consists of two lines in the report. The first line is the record that was kept after the merge transaction, and the second line is the record that was not kept.

The sample on the following page illustrates the report in its default configuration, which includes the following information:

- EUID
- First Name
- Last Name
- SSN
- DOB
- AddressLine1
- AddressLine2

You can configure this report to display any of the fields in the object structure defined in the Object Definition file.

Merged
MERGE TRANSACTION REPORT FOR DECEMBER 12, 2003

EUID	First Name	Last Name	SSN	DOB	AddressLine1	AddressLine2
0000001019	MARCUS	WARING	555444555	1960-05-14	1492 WAYFIELD ROAD	APT. 12
0000001025	MARCUS	WARING		1960-12-14		
0000001022	ELIZA	WARNER	555444477	1976-02-06	2347 FLOWER STREET	
0000001029	LIZ	WARNER		1976-12-16	21347 FLOWER STREET	
0000001027	LIZ	WARRIN		1965-02-06	21009 SHORELINE DRIVE	SUITE 12
0000001024	ELIZABETH	WARREN		1960-05-14	23487 WAYFIELD ROAD	BUILDING 10
0000001028	ELIZABETH	WARES		1965-05-31		
0000001036	LIZ	WARES		1965-05-31		
0000001035	LIZBETH	WARRIN		1965-02-06	21109 SHORELINE DRIVE	SUITE 12
0000001027	LIZ	WARRIN		1965-02-06	21009 SHORELINE DRIVE	SUITE 12

A.1.5 Unmerge Transaction Report

The unmerge transaction report lists each unmerge transaction that occurred in the specified time period. Each transaction consists of two lines in the report. The first line is the record that was kept after the merge transaction that was unmerged, and the second line is the record that was not kept.

The sample on the following page illustrates the report in its default configuration, which includes the following information:

- EUID
- First Name
- Last Name
- SSN
- DOB
- AddressLine1
- Phone

You can configure this report to display any of the fields in the object structure defined in the Object Definition file.

Unmerged
UNMERGE TRANSACTION REPORT FOR DECEMBER 12, 2003

EUID	First Name	Last Name	SSN	DOB	AddressLine1	Phone
0000001019	MARCUS	WARING	555444555	1960-05-14	1492 WAYFIELD ROAD	9895551739
0000001025	MARCUS	WARING	882288228	1960-12-14	1330 ROSEDALE DRIVE	9895557113
0000001022	ELIZA	WARNER	555444477	1976-02-06	2347 FLOWER STR	9895553474
0000001029	LIZ	WARNER		1976-12-16	21347 FLOWER ST	9895554471
0000001027	LIZ	WARRIN		1965-02-06	21009 SHORELINE	9895557373
0000001024	ELIZABETH	WARREN		1960-05-14	23487 WAYFIELD ROAD	9895551346
0000001028	ELIZABETH	WARES		1965-05-31		
0000001036	LIZ	WARES		1965-05-31		
0000001035	LIZBETH	WARRIN	999889999	1965-02-06	21109 SHORELINE DRIVE	9895557373
0000001027	ELIZABETH	WARREN	111221111	1960-05-14	23487 WAYFIELD ROAD	9895551346

A.1.6 Update Report

The update report lists each transaction in which a record was updated and that occurred in the specified time period. Each transaction consists of two lines in the report. The first line in each transaction is the original record that was updated; the second line shows the changes to the record. The sample on the following page illustrates the report in its default configuration, which includes the following information:

- System Code
- Local ID
- EUID
- First Name
- Last Name
- SSN
- DOB
- AddressLine1
- AddressLine2

You can configure this report to display any of the fields in the object structure defined in the Object Definition file.

Updated
UPDATED RECORD REPORT FOR DECEMBER 12, 2003

System	Local ID	EUID	First Name	Last Name	SSN	DOB	AddressLine1	AddressLine2
SLH	23948109	0000012893	LIZ	WARNER	555222999	1976-12-16	21347 FLOWER STREET	
			ELIZA	WARNER	555222999	1976-12-06	2347 FLOWER STREET	
CBMC	239400209	0000003721	ELIZABETH	WARREN		1960-05-14	23487 WAYFIELD ROAD	BUILDING 10
			ELIZABETH	WARREN	555444555	1960-05-14	2347 SHORELINE DRIVE	UNIT 3
WHC	2394809	0000013742	LIZBETH	WARDELL		1972-12-06	12903 SHORELINE DR	
			BETH	WARDELL	555447477	1972-12-06	12903 SHORELINE DR	
SLH	29837149	0000013742	BETH	WARDELL	555447477	1972-12-06	12903 SHORELINE DR	
			BETH	WARDELL	555447477	1970-12-06	12903 SHORELINE DR	
WHC	2324809	0000000003	JOSEPH	WARDELL	888447477	1960-12-06	1401 WAYFIELD ROAD	
			JOSEPH	WARDELL	888447477	1958-12-06	1401 WAYFIELD ROAD	
CBMC	239414109	0000000004	BETHANY	WARNER		1968-04-12		
			BETH	WARNER		1968-04-12	1209 MARSTONS PLACE	
SLH	29597149	0000009878	JONATHON	WARDELL		1958-12-06	5532 BLOSSOM STREET	
			JOSEPH	WARDELL	888447477	1958-12-06	5532 BLOSSOM STREET	
CBMC	295224009	0000001011	BOB	WARWELL	777000001	1964-12-06		
			ROBERT	WARWELL	777000001	1964-12-06		
CBMC	874129037	0000001004	BEVERLY	WARING	444992222	1964-12-06	14231 PAULA ST	
			BEVERLY	WARING	444999222	1964-12-06	14321 PAULA ST	

A.2 Activity Reports

This section describes and shows samples of each of the activity reports provided with eIndex. Unlike the production reports illustrated earlier, the weekly, monthly, and yearly activity reports cannot be configured to display additional information.

A.2.1 Weekly Activity Report

The weekly activity report provides a count of the number of times each type of transaction was processed through the eIndex database in the course of one week. This report always displays information from Sunday through Saturday for the specified week. The totals for the following types of transactions are listed:

- Add
- Update
- EUID Deactivate
- EUID Merge
- EUID Unmerge
- LID Merge
- LID Unmerge
- LID Transfer

Weekly Activity
Transaction Audit

Functions	SUNDAY 03/14/04	MONDAY 03/15/04	TUESDAY 03/16/04	WEDNESDAY 03/17/04	THURSDAY 03/18/04	FRIDAY 03/19/04	SATURDAY 03/20/04	Weekly Total
ADD	58	78	73	49	81	45	45	429
UPDATE	76	94	114	78	74	88	32	556
EUID DEACTIVATE	0	3	0	1	3	0	0	7
EUID MERGE	4	12	17	9	14	0	2	58
EUID UNMERGE	0	1	0	0	3	0	1	5
LID MERGE	2	0	6	8	1	0	1	18
LID UNMERGE	0	0	0	2	1	0	0	3
LID TRANSFER	1	0	3	0	0	1	0	5
Daily Totals	141	188	213	127	177	123	81	1081

A.2.2 Monthly Activity Report

The monthly activity report provides a count of the number of times each type of transaction was processed through the eIndex database in the course of one month. This report always displays information for a single calendar month. If you run the report with a date in the middle of the current month, the report displays the cumulative numbers for the month. The totals for the following types of transactions are listed:

- Add
- EUID Deactivate
- EUID Merge
- EUID Unmerge
- LID Merge
- LID Unmerge
- Unresolved Potential Duplicates
- Resolved Potential Duplicates

Monthly Activity
Transaction Summary
for March 2004

Add Transactions	EUID Deactivate Transactions	EUID Merge Transactions	EUID Unmerge Transactions	LID Merge Transactions	LID Unmerge Transactions	Unresolved Potential Duplicates	Resolved Potential Duplicates
1520	17	129	12	87	3	47	117

A.2.3 Yearly Activity Report

The yearly activity report provides a count of the number of times each type of transaction was processed through the eIndex database in the course of one year. This report always displays information for a single calendar year. If you run the report with a date in the middle of the current year, the report displays the cumulative numbers for the year. The totals for the following types of transactions are listed:

- Add
- EUID Deactivate
- EUID Merge
- EUID Unmerge
- LID Merge
- LID Unmerge
- Unresolved Potential Duplicates
- Resolved Potential Duplicates

Yearly Activity
Transaction Summary
for 2004

Add Transactions	EUID Deactivate Transactions	EUID Merge Transactions	EUID Unmerge Transactions	LID Merge Transactions	LID Unmerge Transactions	Unresolved Potential Duplicates	Resolved Potential Duplicates
18240	114	2916	128	2411	98	177	1404

Index

A

activity reports
 about 9, 12
 application element 16
 appserver element 16
 assumed 9
 assumed match report
 about 10
 fields 10, 20
 sample 21
 assumed matches 9, 10

B

batch file 18

C

CLASSPATH 15
 configuration 15
 configuration file 10, 15
 criteria element 17
 custom reports 10

D

database connection 14
 dates element 17
 deactivated record report
 about 11
 fields 11, 24
 sample 25
 deactivated records 9
 DOCTYPE element 15
 document
 conventions 6
 document conventions 6
 duplicate threshold 11

E

eIndexPersonReport.xml 10, 15, 16
 enable element 17
 Enterprise Designer 14

environment variables 15
 ePath 18

F

field element 18
 fields element 18
 from-date element 18

I

Integration Server 15

J

Java command 19
 Java Runtime Environment 5, 15
 Java Software Development Kit 14
 JDBC 14
 JRE
 see Java Runtime Environment

L

label element 18

M

MasterController 10
 matching threshold 9, 10, 11
 merge 9
 merge transaction report
 about 11
 fields 11, 26
 sample 27
 merge transactions 9
 monthly activity report 9
 about 13
 fields 13, 34
 sample 35

N

name element 17

O

Object Definition file 11
 Oracle 6
 output-file element 17
 output-folder element 16

P

- path element 18
- PL/SQL 5, 6, 10
- potential duplicate report
 - about 11
 - fields 11, 22
 - sample 23
- potential duplicates 9, 10, 11
- production reports
 - about 9, 10

R

- report
 - update 30
- report client 5
- report element 17
- report.bat 18
- report.dtd 16
- reports
 - assumed match 10, 20
 - configuring 10, 15, 16
 - custom 10
 - date ranges 10
 - deactivated record 11, 24
 - environment variables for 15
 - fields 10
 - installing 14
 - merge transaction 11, 26
 - monthly activity 13, 34
 - potential duplicate 11, 22
 - running with the batch file 18
 - running with the Java command 19
 - setting up library files 14
 - unmerge transaction 11, 28
 - update 12
 - weekly activity 12, 32
 - yearly activity 13, 36
- running reports
 - with the batch file 18
 - with the Java command 19

S

- same system matching 11
- Screenshots 7
- SDK
 - see Java Software Development Kit
- SeeBeyond Integration Server 15, 16, 18
- stc_eindex_client.jar 14
- SYSTEM element 16

T

- template element 17
- to-date element 18
- type element 17

U

- unmerge transaction report
 - about 11
 - fields 11, 28
 - sample 29
- unmerge transactions 9
- update report
 - about 12
 - fields 12, 30
 - sample 31
- updates 9

W

- weekly activity report 9
 - about 12
 - fields 12, 32
 - sample 33
- width element 18

Y

- yearly activity report 9
 - about 13
 - fields 13, 36
 - sample 37