SeeBeyond ICAN Suite

Enterprise Data Manager User's Guide

Release 5.0.5

SeeBeyond®

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Chapter 1

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

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1.1 About eView Studio

1.1.1 Overview

eView™ Studio (eView) provides a flexible framework to allow you to create matching and indexing applications called enterprise-wide master indexes (or just *master indexes*). It is an application building tool to help you design, configure, and create a master index that will uniquely identify and cross-reference the business objects stored in your system databases. Business objects can be any type of entity for which you store information, such as customers, members, vendors, businesses, hardware parts, and so on. In eView, you define the data structure of the business objects to be stored and cross-referenced. In addition, you define the logic that determines how data is updated, standardized, weighted, and matched in the master index database.

The structure and logic you define is located in a group of XML configuration files that you create using the eView Wizard. These files are created within the context of an eGate Project, and can be further customized using the XML editor provided in the Enterprise Designer.

1.1.2 Features and Functions

eView provides features and functions to allow you to create and configure an enterprise-wide master index for any type of data. The primary function of eView is to

automate the creation of a highly configurable master index application. eView provides a wizard to guide you through the initial setup steps, and various editors so you can further customize the configuration of the master index. eView automatically generates the components you need to implement a master index.

eView provides the following features:

- **Rapid Development**—eView allows for rapid and intuitive development of a master index using a wizard to create the master index configuration, and using XML documents to configure the attributes of the index. Templates are provided for quick development of person and company object structures.

- **Automated Component Generation**—eView automatically creates the eView configuration files that define the primary attributes of the master index, including the configuration of the Enterprise Data Manager (EDM). eView also generates scripts that create the appropriate database schemas and an eGate Object Type Definition (OTD) based on the object definition you create and configure.

- **Configurable Survivor Calculator**—eView provides predefined strategies for determining which field values to populate in the single best record (SBR). You can define different survivor rules for each field, and you can create a custom survivor strategy to implement in the master index.

- **Flexible Architecture**—eView provides a flexible platform that allows you to create a master index for any business object. You can customize the object structure so the master index can match and store any type of data, allowing you to design an application that specifically meets your data processing needs.

- **Configurable Matching Algorithm**—eView provides support for both the SeeBeyond Match Engine and the Ascential™ INTEGRITY™ matching algorithm. In addition, you can plug in a custom matching algorithm to the master index.

- **Custom Java API**—eView generates a Java API that is customized to the object structure you define. You can call the methods in this API in the Collaborations of the eGate Project.

1.2 What's New in This Release

This release provides enhancements to the Enterprise Data Manager (EDM) and Query Manager. The following changes are included in this release.

- The ability to search by local ID and system was added to the History Search page of the EDM.

- The ability to search by local IDs on the Potential Duplicate Search page of the EDM was enhanced so existing local IDs are found (previously only the local IDs of the record that caused the potential duplicate were found).

- 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 Query **Manager** was enhanced to allow custom queries to be written using combinations of nested AND and OR operations. Previously, only AND operations were supported.

1.3 About This Document

This guide provides information and instructions for using the Enterprise Data Manager (EDM) for SeeBeyond® eView Studio (eView). eView is an application building tool used to create enterprise-wide master indexes of the objects about which you store information, linking information from different locations and computer systems. The EDM allows you to monitor and maintain the information stored in the master index database.

1.3.1 What's in This Document

This guide is divided into five chapters 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** **"Getting Started"** gives a general summary of the master index and the available functions in the EDM, as well as instructions for logging on and off the EDM.

- **Chapter 3** **"Searching for Object Profiles"** gives background information and instructions for searching for object information and viewing search results.

- **Chapter 4** **"Viewing Object Profiles"** gives background information about object profiles, transaction histories, and profile comparisons, along with instructions for viewing this information.

- **Chapter 5** **"Maintaining Object Profiles"** gives instructions for adding and updating object profiles, comparing profiles, resolving potential duplicate profiles, and merging and unmerging profiles.

1.3.2 Scope

This guide provides the information you need to quickly get started with the EDM. It includes navigational instructions, functional instructions, and background information about the application's features. This guide also provides step-by-step instructions for all of the functions of the EDM, such as adding and updating object profile information, identifying duplicate object profiles, merging and unmerging object profiles, and deactivating object profiles. It also includes information on searching for object profiles, viewing a transaction history, and comparing object profiles.

This guide does not include information or instructions on setting up security, configuring the master index, or working with eGate components. These topics are

covered in the appropriate user guide (for more information, see **"Related Documents" on page 13**).

1.3.3 Intended Audience

Any user who needs to review, monitor, or modify data in the the master index database should read this guide. Intermediate or advanced users who need a refresher on using some of the basic functions of the master index should also read this guide. A thorough knowledge of the master index is not needed to understand this guide. It is presumed the user is familiar with basic Web browser tools, and with the types of information stored in the the master index database.

1.3.4 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	▪ 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***.	`bootstrap -p` ***`password`***
Hypertext links	**Blue** text	**http://www.seebeyond.com**

1.3.5 Mouse Conventions

You can use either a single-button mouse or a multiple-button mouse with the EDM. If you use a multiple-button mouse, the left mouse button is the primary button, unless the mouse is configured differently.

The instructions in this guide may require you to use the mouse in a variety of ways:

- **Point** means to position the mouse pointer until the tip of the pointer rests on whatever you want to point to on the screen.

- **Click** means to press and then immediately release the left mouse button without moving the mouse.

- **Double-click** means to click the left mouse button twice in rapid succession.

- **Right-click** means to click the right mouse button once.

- **Drag** means to point and then hold down the mouse button as you move the mouse. **Drop** means to let go of the mouse button to place the dragged information where you want it to be moved.

- **Move** means to point to an object on the screen and then drag the mouse to move the object to a screen location of your choice.

- **Highlight** means to select an area of text by dragging the mouse over the desired portion of text that appears on a window.

- **Select** means to point to a list of information on an EDM page, and then click once to choose the data you want. The information becomes highlighted when selected.

- **Expand** means to double-click a row of information on an expandable list to display more details. The details appear on another row, below the row you double-click.

- **Collapse** means to double-click a row of information on an expandable list to hide the details that appear on the following row.

1.3.6 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.

1.4 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 using the EDM for the master index. In addition, complete documentation of the Java API is provided in Javadoc format.

- *eView Studio User's Guide*

- *eView Studio Configuration Guide*

- *eView Studio Reference Guide*

- *Working with Reports for eView Studio*

1.5 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

1.6   SeeBeyond Documentation Feedback

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

docfeedback@seebeyond.com

Getting Started

This chapter provides information about the master index and how the EDM helps to monitor and maintain object information. It also provides information about the design of the EDM and instructions for logging on to and off of the EDM.

What's in This Chapter

2.1 eView Studio

2.1.1 Overview

eView provides a flexible framework to allow you to create matching and indexing applications called enterprise-wide master indexes (or just *master indexes*). It is an application building tool to help you design, configure, and create a master index that will uniquely identify and cross-reference the business objects stored in your system databases. Business objects can be any type of entity for which you store information, such as customers, members, vendors, businesses, hardware parts, and so on. In eView, you define the data structure of the business objects to be stored and cross-referenced. In addition, you define the logic that determines how data is updated, standardized, weighted, and matched in the master index database.

2.1.2 The Master Index

The application created by eView is an enterprise-wide master index that maintains the most current information about the objects in your business enterprise. The master index creates a single, consistent view of all object data by providing an automatic, common identification process regardless of the location or system from which the data originates.Object records from various locations are cross-referenced using an enterprise-wide unique identifier (EUID) assigned to each profile by the master index. By creating EUIDs, the master index can identify many types of participants, such as customers, employees, contacts, and so on.

The identifying and general information for all objects is centralized in one shared index. The master index is designed specifically to support scattered business locations and disparate information systems across an enterprise, as well as various applications from multiple vendors. Maintaining a centralized database for multiple systems enables the master index to integrate data throughout the enterprise while allowing local systems to continue operating independently. The master index makes it easy to find information that was previously scattered among multiple systems.

2.1.3 Features of the Master Index

The master index is designed to uniquely identify, match, and maintain information throughout a business enterprise. The components of the master index are highly configurable, allowing the master index to be customized for your specific data processing needs. Primary features of the master index include:

- **Centralized Information**
  The master index maintains a centralized database, enabling the integration of data records throughout the enterprise while allowing local systems to continue operating independently. The index stores copies of local system records and the single best record (SBR), which represents the most accurate and complete data for each object. This database is the central location of all object information and identifiers, and is accessible throughout the enterprise. Records from various systems are cross-referenced using the EUID assigned by the master index to each object profile.

- **Configurability**
  Before deploying the master index, you can customize the components and processing capabilities of the system. The configurable components include:

  - The types of objects to index

  - The types of data stored in the master index

  - The standardization and match engines to use

  - Matching, standardization, and phonetic conversion rules

  - Survivorship and weighting rules for determining the SBR

  - The types of queries available

  - How queries are blocked, or grouped, for match processing

  - EDM appearance

  - Searches available to the EDM

  - Local ID validation rules

- **Cross-referencing**
  The master index is a global cross-indexing application, matching records across disparate source systems and simplifying the process of sharing data between systems. The master index uses the local identifiers assigned by your existing systems as a reference for cross-indexing, allowing you to maintain your current systems and practices.

- **Data Cleansing**
  The master index uses configurable matching algorithm logic to uniquely identify object profiles, and to identify duplicate and potential duplicate records. The master index provides the ability to easily merge or resolve duplicates, and can be configured to automatically merge records that are found to be duplicates of one another.

- **Data Updates**
  The master index provides the ability to add, update, deactivate, merge, and delete data in the database tables through messages received from external systems or the EDM. Records received from external systems and the EDM are checked for potential duplicates during processing. Data updates from external systems can occur in real time or as batch processes.

- **Identification**
  The master index employs configurable probabilistic matching technology. This technology uses a matching algorithm to formulate an effective statistical measure of how closely records match. Using a state-of-the-art algorithm in real-time mode and establishing a common method of locating records, the master index consistently and precisely identifies objects within an enterprise.

- **Integration**
  Relying on the eGate Integrator, the master index provides the power and flexibility to identify, route, and transform data to and from any system or application throughout your business enterprise. It can accept incoming transactions and distribute updates to any external system, providing seamless integration with the systems in your enterprise.

- **Matching Algorithm**
  The master index is designed to use the SeeBeyond Match Engine or the Ascential™ INTEGRITY™ matching algorithm to provide a matching probability weight between object records. Both algorithms provide the flexibility to create user-defined matching thresholds, which control how potential duplicates and automatic merges are determined. You can configure the master index to use the match engine of your choice.

- **Unique Identifier**
  The master index assigns an enterprise-wide unique identifier (EUID) to each object added to the database. The index uses the EUID to cross-reference the local IDs assigned to each object by the various computer systems throughout the enterprise.

2.2 Learning about the EDM

The Enterprise Data Manager (EDM) is a web-based interface that allows you to perform various actions against the master index database to monitor and maintain data. The EDM provides the ability to search for, add, update, deactivate, merge, unmerge, and compare object profiles. You can also view and correct potential duplicate profiles, view transaction histories, and view an audit log.

Using the EDM, you can perform the following functions.

▪ **View an Object's History**
The system provides a complete transaction history of each object profile by recording all changes to each object's data. This allows you to view before and after images of a profile for each change made. The table also records the user ID of the person who made the changes. This history is maintained for both the local system records and the SBR.

▪ **Search for Object Profiles**
Using the EDM, you can search for specific objects or sets of objects. The EDM allows you to perform different types of searches using different combinations of data elements, and returns a list of potential matches to your search criteria. For certain searches, the results are assigned a matching weight that indicates the probability of a match.

▪ **Maintain Object Data**
The EDM supports all the necessary features for maintaining object profiles. It allows you to add new profiles; view, update, deactivate, or reactivate existing profiles; and compare profiles for similarities and differences. You can also view each local system record associated with an SBR.

▪ **Compare Object Data**
The EDM allows you to compare two object profiles in a side-by-side comparison so you can evaluate the differences or similarities between the two profiles. You can also compare different objects within one object profile in the same comparison view. For example, you can compare the profile's SBR with a record from System A; or you can compare a profile's record from System A with its record from System B.

▪ **View and Resolve Potential Duplicates**
Using algorithm matching logic, the master index has the ability to identify potential duplicate records, and the EDM provides the functionality to correct the duplication. Profiles that are potential duplicates can be viewed online in a side-by-side comparison. Potential duplication is resolved by either merging the profiles in question or removing their potential duplicate flags.

▪ **Merge and Unmerge Profiles**
You can compare potential duplicate profiles and then merge the profiles if you find them to be actual duplicates of one another. Using the merge feature, you can determine which profile to retain as the active record. The EDM also allows you to merge system records between object profiles, and to specify which information from each system record to preserve in the resulting record. If two object profiles or system records are merged in error, you can unmerge them, returning the information to the original records. You can also view a history of merges for each record by viewing their merge tree.

▪ **Audit Log**
The system administrator can specify that a log be maintained of each instance that object data is accessed from the EDM. This log provides information such as the user ID of the user who accessed the data, the type of action that was performed against the data, and the date and time of access. From the audit log, you can also view a transaction history for each transaction that caused an audit log entry.

▪ **Security**
Security is provided through the integration or application server, and includes

basic access to the database through user logon IDs and passwords, as well as access to specific functions and actions of the master index. Access can be restricted by functions, actions within the functions, data element, and user ID.

2.3 Learning about Object Profiles

2.3.1 Object Profile Components

An object profile, also known as an *enterprise object*, is a set of information that describes characteristics of an individual object in the master index. Figure 1 illustrates an EUID tree for an object profile, which shows all components of a profile.

Figure 1   Object Profile Components
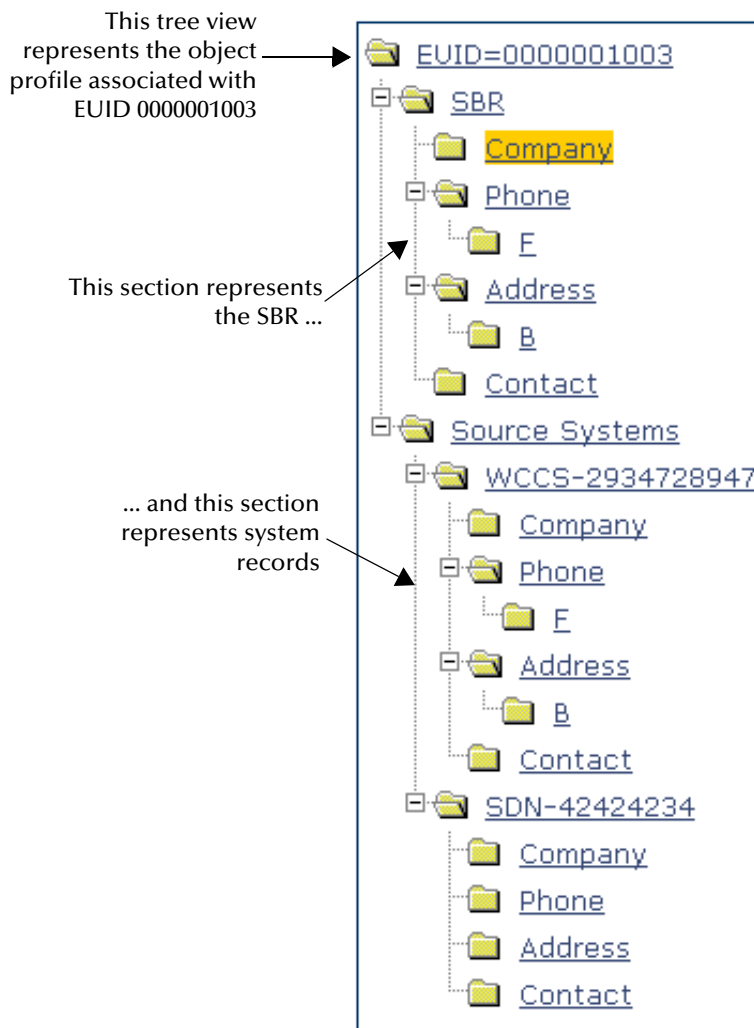
An object profile contains two types of records:

- **System Records**
  A *system record* is a set of information from an external system that shares data with the master index. An object profile may contain several system records.

- **Single Best Record**
  The *single best record* (SBR) is a set of information derived from the best information from each system record in an object profile (as determined by the survivor calculator). Each object profile has only one SBR.

System Records

System records are different from the SBR in that each system record contains a system and local ID pair and only contains data from a specific system. The information in the system records of an object profile is used to determine the best value for the SBR in that profile. If an object profile only contains one system record, the SBR will be identical to that system record. However, if an object profile contains multiple system records, the SBR may be identical to one system record but will more likely include a combination of information from all system records. Certain actions against a system record will cause the SBR to be updated, such as updating, deactivating, or merging a system record. Each active object profile must have at least one active system record. If all system records in a profile are deactivated, then the entire profile will also be deactivated.

Single Best Record

The single best record (SBR) for an object profile is made up of a combination of information from all active system records associated with that object profile. The SBR represents the information that is determined by the master index to be the most reliable and current of all system records in an object profile. The SBR is dynamic, and is recalculated each time an update is made to an associated system record, a merge or unmerge affects the object profile, or a system record in the profile is deactivated or reactivated. You can use the overwrite capability of the EDM to update the SBR directly, or you can update a system record and allow the survivor calculator to determine how to update the SBR (for more information, see **"Survivor Calculator"** below).

If you use the overwrite capability to update a field, that field remains locked and cannot be updated by changes to system records until the field is unlocked. For more information about the overwrite function and locked fields, see **"EDM Overwrite Capabilities" on page 67**.

Survivor Calculator

The survivor calculator determines which information from each system record in an object profile is stored in the SBR for that profile. The calculator uses information defined by the system administrator to calculate the SBR. By default, the survivor calculator uses a *weighted strategy* for most fields, using the relative reliability assigned to each system in combination with the reliability given to the most recently updated value.

For some fields, such as alias and auxiliary IDs, a union strategy is used. This means that all unique alias names and auxiliary IDs from all systems are included in the SBR.

For detailed information about the survivor calculator and configuring the survival strategy, see the *eView Studio User's Guide*.

2.3.2 Object Profile Indicators

In the master index, an object profile can have three different statuses: active, inactive, or merged. The EDM uses special characters in the EUID tree to indicate profiles that have a status other than active. The EDM also uses indicators in the EUID tree to denote the type of profile you are viewing when a side-by-side comparison of the same EUID is displayed. For example, when a transaction history is displayed, the previous image of the profile appears in parentheses. Table 2 lists and describes each indicator.

Table 2   Object Profile Indicators

Indicator	Status
No indicator.	The status of the profile is active.
Tilde (~)	The status of the profile is inactive or merged. For example, **EUID=~1001002135**. This indicator is also used with local IDs to indicate a merged or inactive system record.
Brackets ([])	Brackets indicate that the records displayed are the same version of the same profile. This is used on the Comparison page when comparing different components of the same profile. The EUID on the left appears in brackets. For example, **EUID=[1001002135]**.
Parentheses (())	When a transaction or merge history is displayed, the EUID representing the previous version of the displayed profile appears in parentheses. This profile represents the status of the profile before the transaction or merge occurred. For example, **EUID=(1001002135)**.

2.3.3 System Record and SBR Components

In the master index, each system record and SBR in an object profile contains a set of sub-objects that store different types of information about the object. Generally, a record contains a parent object and several child objects. A record can have only one parent object, but can have multiple child objects and multiple instances of each child object, with each instance being identified by a unique field. For example, in a master person index a record can only contain one person name and social security number (contained in the parent object), but could have multiple addresses and telephone numbers (contained in child objects). Each address must be of a different type, such as a home address, billing address, or mailing address.

2.3.4 Identification Numbers for each Object

Each object in the master index is assigned a unique identification number in addition to the local IDs assigned by individual systems. Each object has one unique

identification number throughout your organization, and a unique identification number within each system with which they are registered.

EUID

Every object in the master index system is assigned an enterprise-wide unique identification number. This number is the same for that object regardless of the system from which the object information originates. This number is called the enterprise-wide unique identifier (EUID), and is used to cross-reference object profiles in order to accurately identify the objects throughout your organization.

Local ID

A local ID is a unique local identification number that is assigned to an object in each system at which it is registered. These numbers are assigned using a numbering system unique to each local system, and are used internally by the systems to identify object profiles. The master index uses an object's EUID to cross-reference its local IDs in different systems. Note that the name of the Local ID field is configurable and might have been modified for your implementation.

2.4 Working with the Enterprise Data Manager

The EDM is a web-based application, which means you access the application through an internet browser. The EDM uses standard web-based features, such as hyperlinks, data fields, and action buttons, to help you enter information and navigate through the different EDM pages. This section provides basic information about the design of the EDM, logging on and off the EDM, and using online help.

2.4.1 Logging on to the EDM

Before you can use the EDM, you must first log on to the application by entering the correct URL in your Web browser, and then specifying your logon ID and password. Make sure you have a user ID and password for the master index before logging on. The integration server running the master index application must be started before you can log on to the EDM.

Important: *After a certain period of inactivity, the EDM will automatically log off. This value is specified in the file **web.xml** (located in <logicalhost_home>\stcis\catalina\conf). The default time is 30 minutes. If you are automatically logged off, you must re-enter the URL to log back on.*

Figure 2   EDM Logon Page
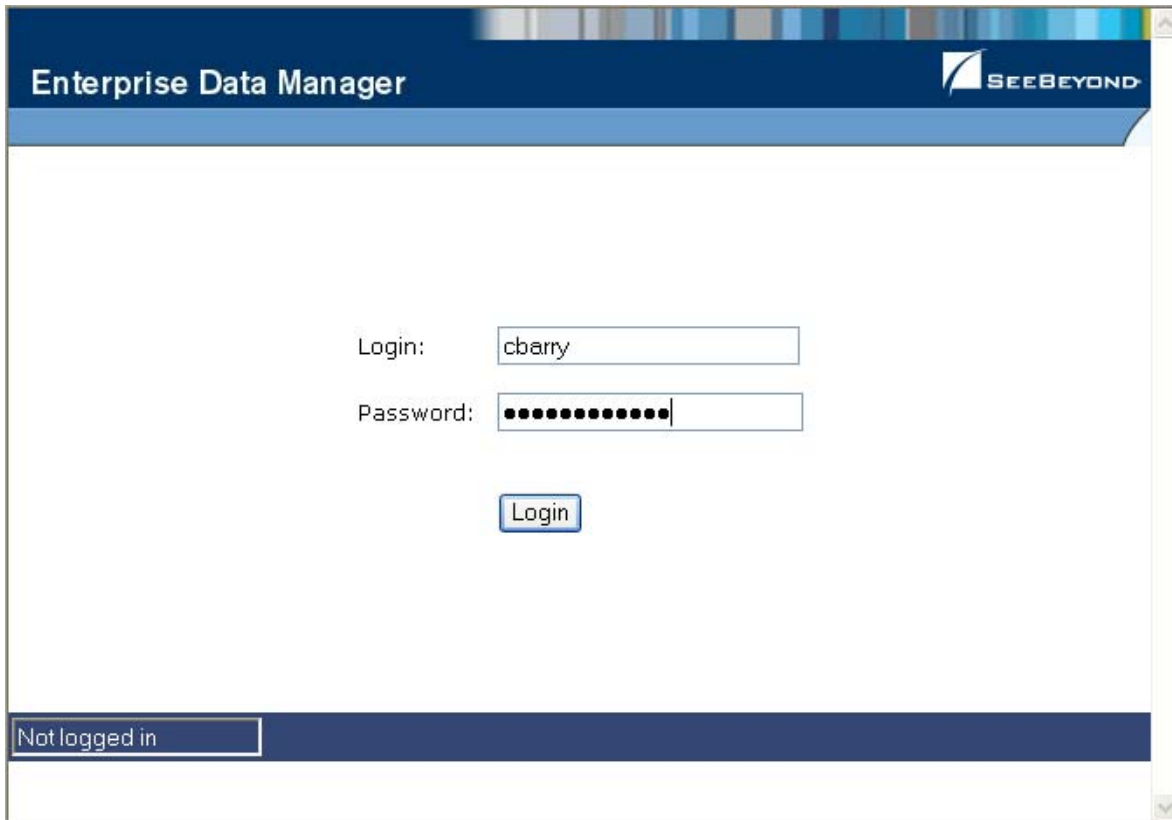
To log on to the EDM

1   Launch a Web browser (Internet Explorer 6.0 with SP1).

2   In the Address field, enter the appropriate URL.

The logon page appears.

Note: *The default URL is: http://**<host>**:**<port>**/**<app_name>**edm, where **<host>** is the name of the server machine, **<port>** is the port number used by the EDM (by default, this is 18004), and **<app_name>** is the name of the index application specified in the eView Project. See your system administrator for more information. (System administrators: The host and port values are listed in the **Web Container Configuration** section of the SIS **Properties** window in Enterprise Designer.)*

3   Enter your logon ID and password in the appropriate fields.

4   Click **Login**. The Search page appears.

2.4.2 Navigation Tips

The EDM provides hyperlinks and command buttons to help you access and move through the EDM pages.

Navigating the EDM Functions

The actions you can perform on the EDM are grouped into four primary functions: Search, Matching Review, History, and Create System Record. The main menu on all EDM pages provides hyperlinks to each of these functions, as shown in Figure 2. The first page to appear for each function, except the Create System Record function, is a search page. The names of these headings can be modified for your application.

Figure 3   Main Menu Navigation Tools

- **Search**
  The Search function allows you to perform a search for an object profile or set of object profiles in the master index. From the associated pages, you can compare two object profiles, compare records in one object profile, view all information for one object profile, update an object profile, view a transaction history of an object profile, view an object's potential duplicates, or merge object profiles or system records.

- **Matching Review**
  The Matching Review function allows you to perform a search for potential duplicate profiles or for any profiles that were updated by an assumed match. From the associated pages, you can compare, merge, or resolve potential duplicate profiles, and you can view and reverse assumed match transactions.

- **History**
  The History function allows you to perform a search for transaction histories or audit log entries. From the Transaction History pages, you can compare information about an object before and after a transaction occurred, select object profiles to unmerge, and view a merge history for an object profile. The audit log pages allow you to view information about transactions in which data about an object was accessed through the EDM.

- **Create System Record**
  The Create System Record function allows you to create new object profiles by creating a system record. When you save the information in the system record, the master index automatically generates the SBR using the survivor calculator.

Navigating the Search Pages

When you perform a search for object information using the Search, History, or Matching Review functions, information appears in three different pages. The *Search page* displays the fields you can use as search criteria, the *Search Result page* displays a list of search result profiles, and the *detail pages* display the object profiles you selected from the results list. Once you perform a search, you can navigate back through these pages using the hyperlinks provided in a secondary menu below the main menu, as

shown in Figure 4. The Matching Review page for potential duplicate searches, includes an additional results page called the *Associated Records* page.

Figure 4   Search Page Navigation Tools

The behavior of the commands on the secondary menu for Search, Matching Review, and History is described in Table 3.

Table 3   Secondary Menu Navigational Tools

Menu Option	Description
Search	Returns to the original search page with the search criteria filled in.
Search Result	Returns to the search results list.
<Detail Page Name>	This is the name of the current detail page. Clicking this menu option does not perform any action unless you perform a merge from the Comparison page. In this case the Comparison option becomes active and returns to the Comparison page.
Back to Search	This option becomes available when you select Transaction History or Potential Duplicate from the View/Edit page. It returns to the View/Edit page.

Navigating the Detail Pages

The detail pages display an EUID tree view of the object profile on the left, and the detailed information for the selected tree-view object on the right. If you are viewing a comparison of object profiles, the tree views appear in the outer sections of the page, with the detailed information in the center. Figure 5 illustrates a sample of the View/Edit page, and shows the tree view on the left with the parent object of the SBR selected. The detailed information displayed on the right is associated with the selected parent object. When you select a different object from the tree view, the detailed information in the right portion of the page changes accordingly.

Figure 5   Sample View/Edit Page
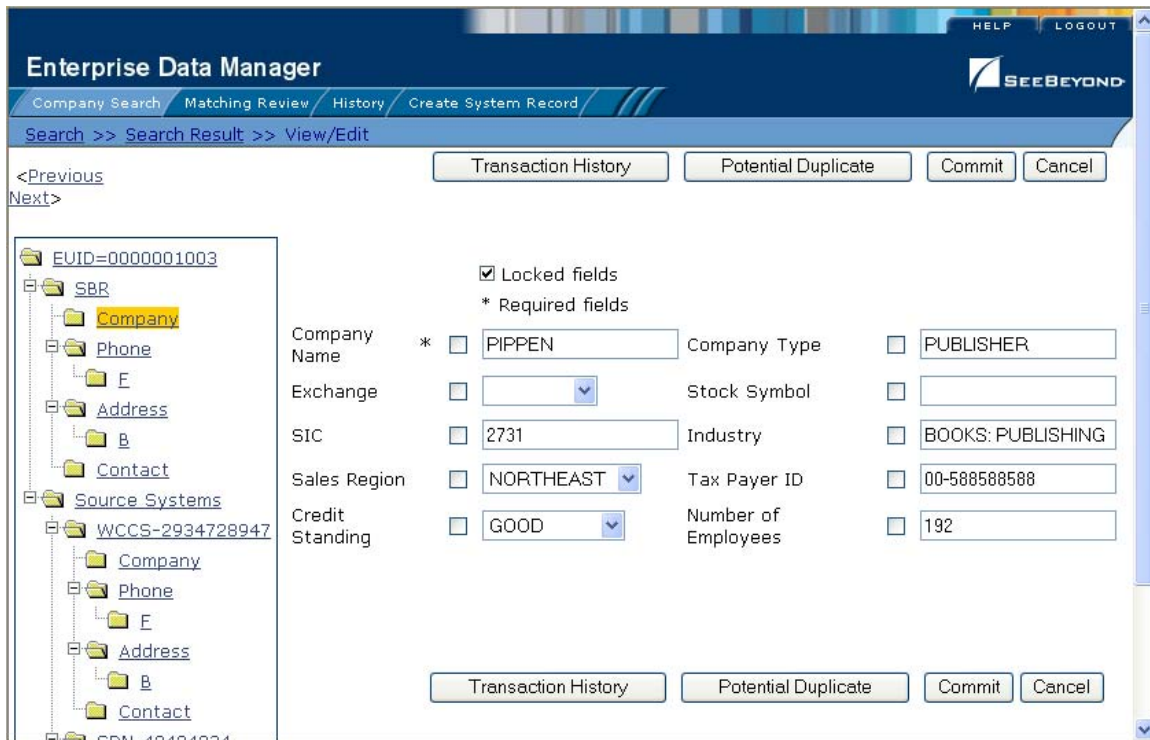
2.4.3 Logging Off the EDM

Before you exit the EDM, make sure you have saved any changes.

To exit the EDM

1   In the upper right corner of the page, click the **Log Off** button.

2   On the confirmation dialog that appears, click **Yes**.

Searching for Object Profiles

Before you can view or modify an object profile, you must perform a search for the profile using the search tools provided by the EDM. This chapter presents the background information and the step-by-step instructions you need to find object information using the EDM. This chapter does not describe the additional search capabilities provided on the History or Matching Review pages. The History searches are described in **Chapter 4**, and the Matching Review pages are described in **Chapter 5**.

The appearance of your EDM will vary from the illustrations depending on how your application is configured.

What's in This Chapter

- **Learning About Object Queries** on page 27
- **Searching for Object Profiles** on page 29
- **Working with Search Results** on page 35

3.1 Learning About Object Queries

Before you can view or update object information, you need to perform a search for the object. There are several different search capabilities within the EDM. You can perform lookups for specific object profiles using unique identifiers such as the EUID or local ID, and you can perform broader searches using data from the parent or child objects as criteria.

3.1.1 About the Search Function

By default, the Search tab includes three different search pages: Lookup, Search, and Comparison Lookup. The design of the search functionality provides flexibility in designing database queries. You can narrow a search for a specific object or a range of objects using various search fields located on the search pages. You can enter search criteria on the Advanced Lookup pages, and then view your search results on the Search Result page. When you select a specific object from the Search Result page, detailed information for that object appears on the View/Edit page.

The Lookup Page

The Lookup page of the Search function allows you to perform lookups using unique identifiers to find a specific object profile. By default, the unique identifiers you can use as search criteria include the EUID or local ID and system. When you perform this type of search, the Search Result page is generally bypassed and the View/Edit page appears displaying information about the matching profile

The Search Page

The Search page allows you to perform various types of searches against the database using a combination of fields as criteria. By default, you can perform three types of searches on this page. You specify the search type by selecting the appropriate option button in the upper portion of the Search page.

- **Alphanumeric Search**—This type of search is an exact match search, meaning it only returns profiles that exactly match the criteria you specify. Most fields in this search allow wildcard characters if the exact value is unknown.

- **Phonetic Search**—This type of search compares the phonetic values of certain fields entered as criteria. The object profiles returned by a phonetic search are assigned a matching probability weight to indicate how closely they match the search criteria. Phonetic searches are not exact match searches and allow for misspellings or data entry errors.

- **Blocker Search**—This type of search allows you to perform searches against the database using pre-defined combinations of fields as criteria. The object profiles returned by these searches are assigned a matching probability weight to indicate how closely they match the search criteria. For information about the pre-defined field combinations, see your system administrator.

The Comparison Lookup Page

The Comparison Lookup page of the Search function allows you to perform a search for multiple object profiles by entering their EUIDs. You can then select two of the resulting records to view on the Comparison page. Use this type of search if you want to compare object profiles and you know the EUIDs of the object profiles to compare.

The Search Result page

The Search Result page of the Search function displays a list of object profiles found in the database that closely match the search criteria you entered. The results list appears in a table, with the number of profiles returned for the search displayed above the table. This page displays information to help you identify the correct object profile, such as the EUID or address information. This page also displays a list of the search criteria entered for the search that returned the displayed list. For more information about search results and the Search Result page, see **"Working with Search Results" on page 35**.

3.1.2 Types of Searches

There are several different methods of searching for objects, depending on the search criteria you enter. The search pages of the Search function are organized into different sections that allow you to perform different types of searches based on specific categories of criteria. On the Simple Lookup page, you can only perform one type of search at a time, using the fields from only one search section.

Note: *The names of the search types are configurable. This section describes the searches by their default names and by their default search criteria. See your system administrator if you have questions about how your search pages are configured.*

EUID Lookup

You can perform an EUID Lookup using the field in the **Enterprise Unique ID** section of the Simple Lookup page. Enter the object's EUID number to perform an exact match search against the database.

Local ID Lookup

The Local ID section of the Simple Lookup page consists of two fields. The System and the Local ID fields are required to perform a local ID lookup. To increase search accuracy, you can only select a system listed in the drop-down list. The Local ID field is case-sensitive. The name of this section is configurable and might have been modified for your implementation. See your System Administrator for more information.

Advanced Search

The advanced search function allows you to perform three different types of searches: alphanumeric, phonetic, and blocking. The fields displayed on the Search page are configured by the system administrator. You can enter as much information as needed to narrow down the search appropriately.

Comparison Lookup

The Comparison Lookup function provides a simple way to search for two or more records to compare in a side-by-side comparison. You can enter up to five EUIDs as search criteria, and all records matching any of the specified EUIDs are returned.

3.2 Searching for Object Profiles

This section provides the step-by-step instructions you need to follow to perform the various types of searches available on the EDM. The search types include:

- EUID Lookup
- Local ID Lookup

- Advanced Alphanumeric Search

- Advanced Phonetic Search

- Advanced Blocker Search

- Comparison Lookup

Note: *To move from one field to another on the search pages without using the mouse, press the **Tab** key. The name of the Local ID section is configurable.*

3.2.1 Performing an EUID Lookup

To search for a an object profile using only an object's EUID, you need to enter the EUID number in the EUID Search section of the Lookup page. This type of search should result in only one matching profile.

Figure 6   Lookup Page

To perform an EUID lookup

1 On the Search page, select *<app_name>* **Lookup** from the **Search Type** drop-down list (where *<app_name>* is the name of the master index application).

2 In the Enterprise Unique ID section, enter the object's EUID.

3 Click **Search** or press **Enter** to initiate the search.

The View/Edit page appears, displaying detailed information about the object whose EUID you entered.

3.2.2 Performing a Local ID Lookup

To search for an object profile by its local ID in a specific system, you need to enter search criteria in the Local ID section of the Lookup page. This type of search should result in only one matching profile. If the Local ID field contains alphabetic characters, the criterion is case-sensitive.

Note: *The name of this section might have been modified for your implementation. See your System Administrator for more information.*

To perform a local ID lookup

1   On the Search page, select **<app_name> Lookup** from the **Search Type** drop-down list (where **<app_name>** is the name of the master index application).

2   Enter your search criteria in the Local ID section (for more information, see **"About Local ID Lookup Fields"** following this procedure).

3   Click **Search** or press **Enter** to initiate the search.

The Search Result page is bypassed, and the View/Edit page appears.

About Local ID Lookup Fields

The fields in the Local ID section of the Lookup page allow you to search for an object by its local ID. There are no defaults for these fields, and both fields are required for the search.

Table 4   Local ID Lookup Fields

In this field …	type or select …
System	The computer system, such as a registration system, for which the object's local ID is known.
Local ID	The object's unique identification code at the specified system. **Note:** *If alphabetic characters are entered in this field, the search is case-sensitive. This field name might have been modified for your implementation.*

3.2.3 Performing an Alphanumeric Search

To perform an alphanumeric search for an object profile, you need to specify identifying information for the object on the Alphanumeric Search page. This type of search may result in several matching profiles.

Figure 7 Alphanumeric Search Page

To perform an alphanumeric search

1 On the Search page, select **<app_name> Search** from the **Search Type** drop-down list (where **<app_name>** is the name of the master index application).

2 Select the option button next to **Alpha Search**.

3 Enter the search criteria for the object you want to find.

Note: *You should make your search as specific as possible. This type of search does allow wildcard characters. Use a percent sign (%) to indicate any unknown characters.*

4 Click **Search** or press **Enter** to initiate the search.

The Search Result page appears with a list of matching profiles. If only one matching profile is returned, the View/Edit page appears.

Important: *The system administrator can choose whether to display the EUID field or the local ID and system fields on this page. Any values entered into these optional fields take precedence over information entered into other search fields. For example, if an invalid EUID is entered but valid first and last names are entered, no results are returned due to the invalid EUID. The EUID field takes precedence over the local ID and system fields.*

3.2.4 **Performing a Phonetic Search**

To perform a phonetic search for an object profile, you need to specify identifying information for the object on the Phonetic Search page. This search may return several profiles.

Figure 8 Phonetic Search

To perform a phonetic search

1 On the Search page, select **<app_name> Search** from the **Search Type** drop-down list (where **<app_name>** is the name of the master index application).

2 Select the option button next to **Phonetic Search**.

3 Enter the search criteria for the object you want to find.

4 Click **Search** to initiate the search.

The Search Result page appears with a list of matching profiles.

Important: *The system administrator can choose whether to display the EUID field or the local ID and system fields on this page. Any values entered into these optional fields take precedence over information entered into other search fields. For example, if an invalid EUID is entered but valid first and last names are entered, no results are returned due to the invalid EUID. The EUID field takes precedence over the local ID and system fields.*

3.2.5 Performing a Blocker Search

To perform a blocker search for an object profile, you need to specify identifying information for the object on the Blocker Search page. This search may return several profiles.

Figure 9 Blocker Search

To perform a blocker search

1   On the Search page, select **<app_name> Search** from the **Search Type** drop-down list (where **<app_name>** is the name of the master index application).

2   Select the option button next to **Blocker Search**.

3   Enter the search criteria for the object you want to find.

4   Click **Search** to initiate the search.

The Search Result page appears with a list of matching profiles.

Important: *The System Administrator can choose whether to display the EUID field or the local ID and system fields on this page. Any values entered into these optional fields take precedence over information entered into other search fields. For example, if an invalid EUID is entered but valid first and last names are entered, no results are returned due to the invalid EUID. The EUID field takes precedence over the local ID and system fields.*

3.2.6 Performing an EUID Comparison Lookup

To perform a search by EUID for multiple profiles to compare, you need to specify each EUID on the Comparison Lookup page. You can enter from two to five EUIDs to compare in the search results list, and then select one or two of the resulting profiles to compare their information.

Figure 10 Comparison Lookup Page
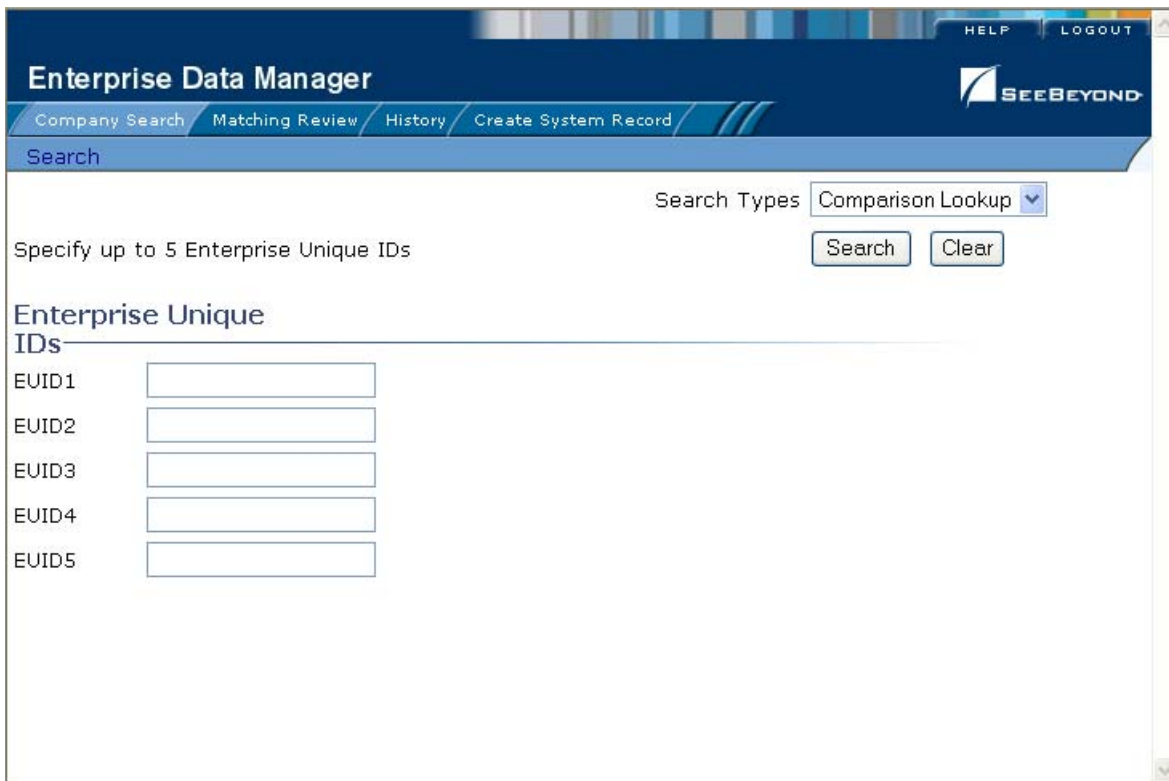
To perform an EUID comparison lookup

1 On the Search page, select **Comparison Lookup** from the **Search Type** drop-down list.

2 Enter at least two, and up to five, EUIDs.

3 Click **Search** or press **Enter** to initiate the search.

The Search Result page appears with a list of matching profiles.

3.3 Working with Search Results

This section of the chapter describes the Search Result page and how to sort and select the profiles that match the searches you perform. The criteria that you entered for a search appear above the results list table on the result page.

3.3.1 Viewing the Results of a Search

The matching profiles that result from an object search appear in table format on the Search Result page. The table displays a limited number of fields contained in the SBR of the object profile.

Figure 11 Search Results List

To view the profiles on the Search Result page

1 Perform a search for the object whose profile you want to access.

If more than one record matches the criteria, the Search Result page appears.

2 In the results list, view the information presented for each returned profile to determine which profile you want to view.

3 If an address or telephone number field is included in the results list and contains an ellipsis ("..."), you can click the ellipsis to view additional address or telephone information, as shown in Figure 12 and Figure 13.

Figure 12   Address Information Page
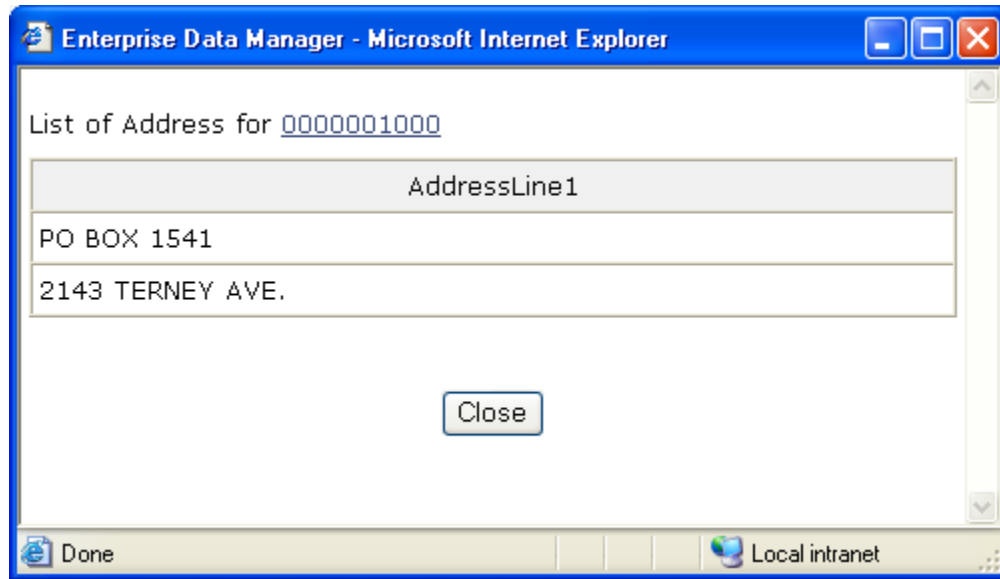
Figure 13   Telephone Information Page
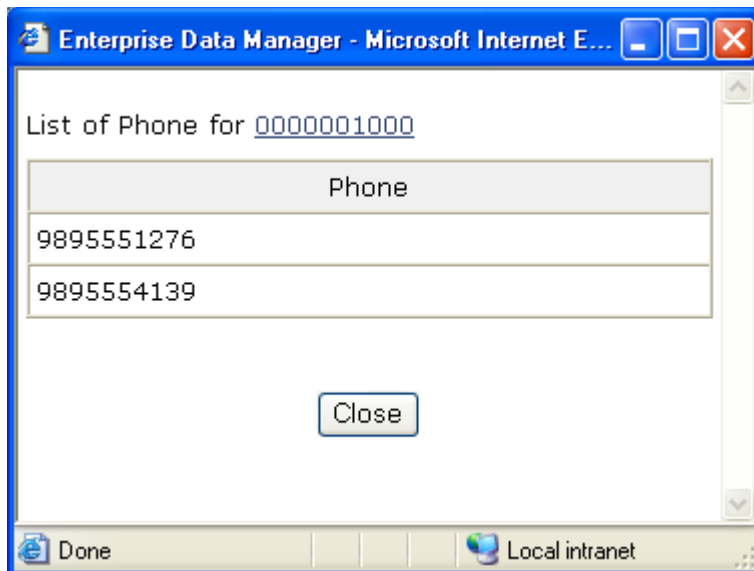
4   When you are finished viewing the additional address or telephone information, click **Close**.

5   To view the following page of results, click **Next>**.

6   To return to the previous page of results, click **<Previous**.

7   To select a profile to display on the View/Edit page, click the EUID of that profile.

8   To perform a new search, click **New Search** in the upper portion of the page.

3.3.2 Sorting the Results of Your Search

The matching profiles that result from an object search appear in table format on the Search Result page. By default, the results are sorted by EUID, but you can sort the results by any column in the table.

To sort the profiles on the Search Result page

1 Perform an advanced search for the object whose profile you want to access.

2 In the results list that appears on the Search Result page, click the column heading of the column by which you want to sort the results.

3.3.3 Selecting a Profile from the Results List

From the search results list, you can select one object profile to view detailed information for that profile, or you can select two object profiles to compare the information in both profiles.

To select a profile to view

1 Perform an advanced search for the object profiles you want to view.

2 To view detailed information for one object profile, click the EUID of that profile.

The View/Edit page appears, displaying the parent object for that profile.

3 To compare two object profiles, select the check boxes to the left of each profile you want to compare, and then click **Compare Records**.

The Comparison page appears, displaying a side-by-side comparison of the two profiles.

4 To compare different components of one object profile, select the check box to the left of the profile you want to view, and then click **Compare Records**.

The Comparison page appears, displaying a side-by-side comparison of two instances of the same object profile.

Note: *Note: Once a comparison check-box is selected in the search results list, it remains checked until you deselect it. If you return to the Search Result page from the Comparison page, deselect the selected check boxes before making another selection.*

Viewing Object Profiles

This chapter presents the background information and the step-by-step instructions you need to view and compare object information using the EDM. The information in this chapter is based on the default configuration for eView, and the appearance of your EDM may vary depending on how your system administrator configured eView.

What's in This Chapter

- **Object Profile Views** on page 39
- **Viewing Object Profiles** on page 43
- **Comparing Object Information** on page 45
- **Viewing a Merge History** on page 55
- **Viewing the Audit Log** on page 57

4.1 Object Profile Views

Before you can view object information, you need to perform a search for the object using one of the search techniques described under **"Searching for Object Profiles" on page 29**. Once you retrieve a search results list, you can view an object's detailed information, compare object profiles, view a merge transaction history for a profile, and view a history of all transactions for a profile.

4.1.1 The View/Edit Page

When you select a profile on the Search Result page, detailed information about the selected object appears on the View/Edit page. This page is divided into two sections. The left side of the page is a tree view that displays the EUID, the components of the SBR, and the components of each system record. You can select a component from the EUID tree to display detailed information about that component in the right portion of the page. The View/Edit page displays the selected object's information, and you can select any record component to view additional information. From the View/Edit page, you can perform several actions, such as viewing a transaction history for the object, viewing potential duplicate profiles, deactivating the profile, updating object information, and so on.

The Tree View

A tree view on the left side of the View/Edit page displays an outline of the profile, including the SBR and any associated system records. This is called the EUID tree.

Figure 14   Object Profile Tree View
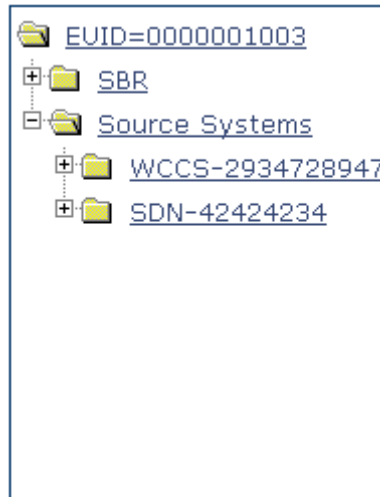
You can expand this tree view to view the different types of information contained in the SBR and in each system record. A plus sign (+) to the left of an item indicates that the item contains additional information. For certain components, a code appears in the tree to indicate a record. For other components, a description appears in the tree. For example, an address or telephone number might have a type code that appears in the tree; but for an alias name, the entire name might appear.

Figure 15 Expanded Object Profile Tree View
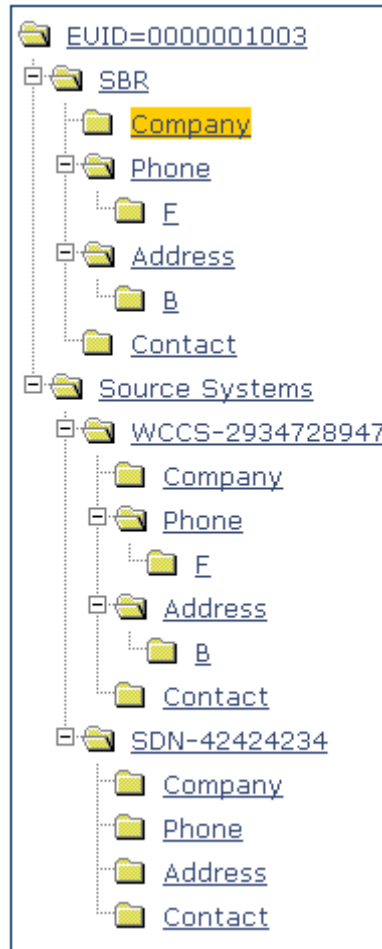
Information Fields

The right side of the View/Edit page displays detailed information about the item that is selected in the EUID tree. For example, if you have a master company index, selecting the parent object (Company) might display information about the company's name, industry type, tax ID number, and so on. Selecting a specific address type displays information about a specific address for the company. For more information about object profiles, see **"Learning about Object Profiles" on page 19**.

4.1.2 Object Profile Comparisons

You can compare two different object profiles by selecting the profiles to compare from a search results list. You can also compare different components of one object profile. The Comparison page allows you to view the selected profiles or components of one profile in a side-by-side comparison. Like the View/Edit page, the Comparison page displays an EUID tree for each profile, from which you can select the type of information you want to compare. This design allows you to compare one object's SBR

with another's SBR, one object's system records with another's system records, or one object's SBR with another's system records. You can also compare a profile's SBR with one of its own system records or two system records from one profile. This gives you a complete comparison between object profiles and between the different records in an object profile.

From the Comparison page, you can merge object profiles or system records if they are found to represent the same object.

4.1.3 Object Profile Transaction Histories

You can view a history of all transactions performed against object profiles either by performing a search as described in **"Searching for Object Profiles" on page 29**, or by performing a Transaction History search on the History page. The second type of search is described in this chapter. You can trace the events that modified an object profile from the time the profile was added to the master index to the most previous transaction, including merged and deactivated profiles.

The Transaction History page allows you to view a side-by-side comparison of one object profile before and after a transaction occurred against that profile. Like the Comparison page, the Transaction History page displays an EUID tree for each profile, from which you can select the type of information you want to compare. For a true comparison, be sure the type of information you are viewing is the same on both sides of the page. You can also compare an SBR against an SBR, an SBR against a system record, or a system record against a system record.

4.1.4 Object Profile Merge Histories

On the Merge History page, you can display a history of the merges that have affected a specific object profile. The merge history appears in an EUID tree format on the left side of the page. The top level displays the EUID of the current active profile. The two profiles at the second level show you the EUIDs of the profiles that were merged to form the top-level profile. If there are profiles listed at the third level, they display the EUIDs of the profiles that were merged to form the profile above them. There may be several levels of merges displayed in an object's merge history.

The right side of the page displays information about the merge transactions that involved the EUID that is selected in the EUID tree on the left. You can select a specific transaction to view a transaction history comparison for that merge transaction.

4.1.5 The Audit Log

The audit log allows you to track and view all instances in which information about the objects in the master index was accessed through the EDM. If audit logging is enabled, an audit log entry is created each time the EDM accesses database tables that contain object information. The audit log keeps a record of each time the tables are accessed, along with the database function used to access the tables, the logon ID of the user accessing the tables, the date and time the tables were accessed, and the EUIDs of the object profiles that were accessed. The audit log is enabled and disabled in the Enterprise Data Manager file in the eView Project.

4.2 Viewing Object Profiles

Object profiles are displayed on the View/Edit page, with a series of pages you can select and view. You can view information associated with any of the SBR or system record components in an object profile. The SBR contains the information that is determined to be the most current and accurate information about that object from all local systems. By default, when the View/Edit page first appears, information in the SBR is visible.

The system records associated with a profile contain the information that is stored in the external systems that share information with the master index. The information in an object's system records might not match the information stored in the object's SBR.

Figure 16   View/Edit Page - SBR
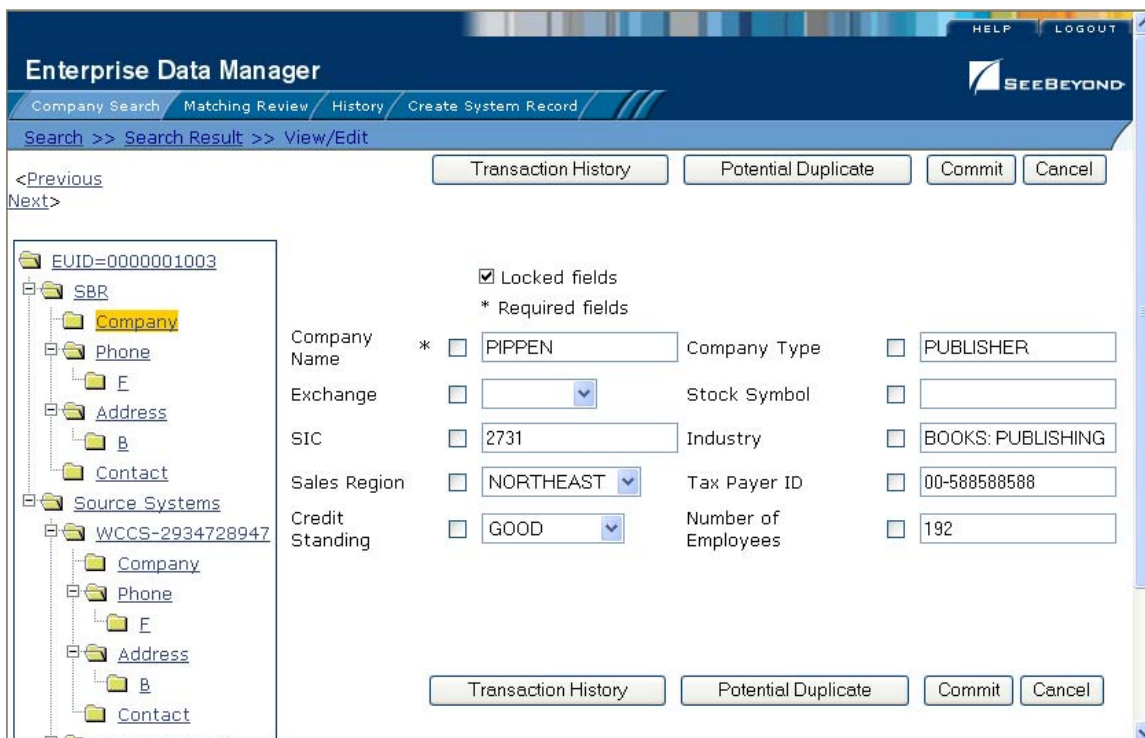
To view object information

1 Perform a search for the object whose information you want to view as described in **"Searching for Object Profiles"** in **Chapter 3**).

2 On the Search Result page, click the EUID of the object profile you want to view.

   The View/Edit page appears with the parent object of the SBR selected.

3 To view different types of information in the SBR for the displayed object:

   ◆ In the EUID tree in the left portion of the page, expand the SBR until you can see the child object type you want to view.

   ◆ To view the parent object in the SBR, select the first folder in the SBR tree.

   ◆ To view a child object in the SBR, expand the child object type you want to view and then select any of its sub-folders.

4   To view different types of information in a system object for the displayed object:

   ◆ In the EUID tree in the left portion of the page, expand **Source Systems**.

   ◆ Expand the system code and local ID you want to view.

   ◆ To view the parent object in the system record, select the first folder under the expanded system code and local ID.

   ◆ To view a child object in the system record, expand the child object type you want to view and then select any of its sub-folders, as shown in Figure 17.

Figure 17   View/Edit Page - System Records
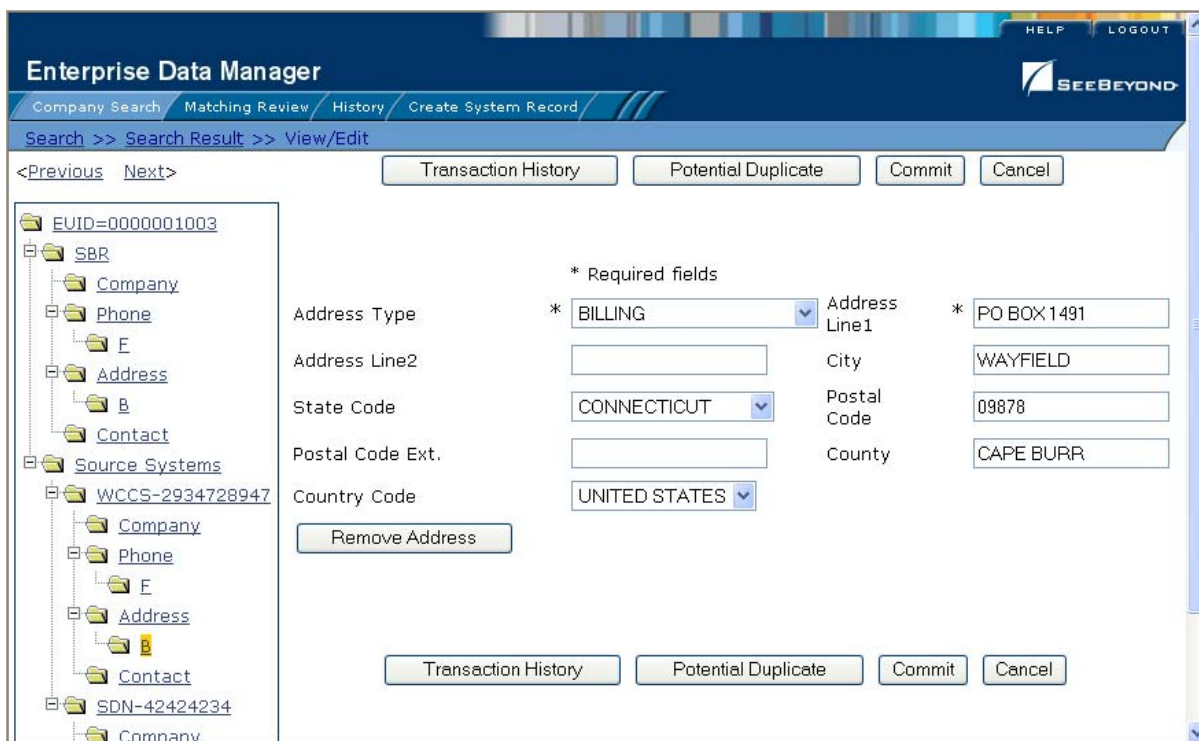
5   From the View/Edit page, you can do any of the following:

   ◆ To modify object information, follow the appropriate procedure under **"Maintaining Object Information" on page 72**.

   ◆ To view a history of transactions for the displayed profile, click **Transaction History** in the upper portion of the View/Edit page (for more information, see **"Viewing a Transaction History" on page 45**).

   ◆ To view potential duplicates of the displayed profile, click **Potential Duplicate** in the upper portion of the View/Edit page (for more information, see **"Handling Potential Duplicates" on page 66**).

   ◆ To view detailed information for the following object in the search results list, click **Next>** in the upper portion of the page.

♦ To view detailed information for the preceding object in the search results list, click **<Previous** in the upper portion of the page.

4.3 Comparing Object Information

This section provides the step-by-step instructions you need in order to compare object information in the master index. You can compare an object profile before and after a specific transaction occurred or you can compare two different object profiles. The procedures described in this section are:
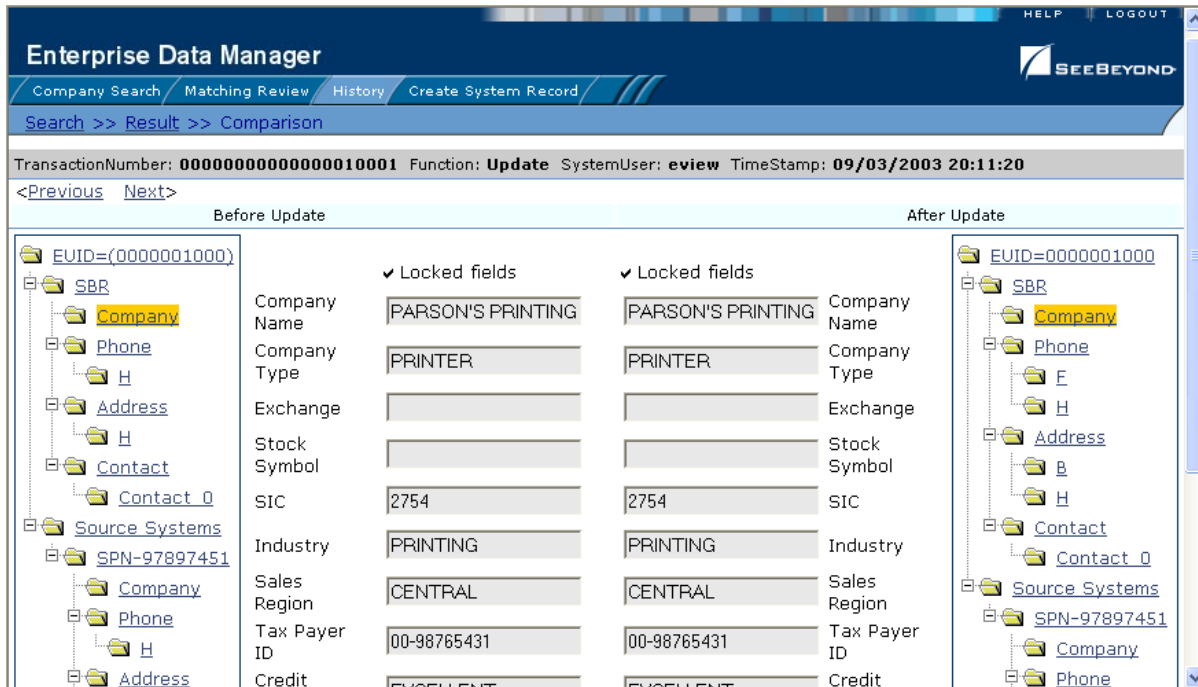
- Viewing a Transaction History
- Comparing Object Profiles

4.3.1 Viewing a Transaction History

Using the History function, you can view historical information for a specific object, and compare the object's profile before and after a specific transaction occurred to determine what information was modified as a result of the transaction. The Transaction History page contains an EUID tree for the before image and one for the after image. You can select the type of information to view, and whether to view SBR or system record information, from the EUID trees.

The image on the left side of the Transaction History Comparison page reflects the object's information before the transaction occurred. The image on the right reflects the object's information after the transaction occurred. If the displayed record has no historical data, then the message "**There is nothing to show in this area**." appears in the left side of the page.

Figure 18   Transaction History Comparison Page

To view a transaction history

1   Obtain information about the object, such as their EUID, a system in which they were registered, or a specific transaction performed against the object's profile.

2   To access a transaction history, you can perform a search for an object profile, display the profile on the View/Edit page, and then click **Transaction History**, or you can perform the following steps.

3   On the EDM main menu, click **History**.

    The Transaction History Search page appears.

Figure 19 Transaction History Search Page

4 Select **History Search** from the **Search Type** drop-down list.

5 Do one of the following:

▪ To search for a record by system and local ID, enter the system and local ID in the upper section of the window and then click **Lookup EUID**. If an EUID is found, it is populated into the EUID field in the Search Criteria section.

▪ To search by EUID or transactional information, enter the search criteria for the object you want to view.

Note: *For more information, see* **"About Transaction History Search Fields"** *following this procedure.*

6 On the Transaction History Search page, click **Search**.

The Transaction History Result page appears with a list of matching profiles (for more information, see **"About Transaction History Results Fields"** following this procedure).

Figure 20   Transaction History Results

7   On the Transaction History Result page, click the transaction number of the transaction you want to view.

The Transaction History Comparison page appears, displaying information in the SBR.

8   Select the type of information you want to view from the EUID trees on both sides of the page (for more information, review the instructions under **"Viewing Object Profiles" on page 43**).

9   If you are viewing a merge transaction, additional options appear in the upper left portion of the page. These allow you to view different images for the transaction. Select the first EUID to view the before image of the surviving profile; select the second EUID to view the before image of the non-surviving profile.

Figure 21   Transaction History for Merge

10 If you are viewing an unmerge transaction, additional options appear in the upper right portion of the page. These allow you to view different images for the transaction. Select the first EUID to view the after image of the surviving profile; select the second EUID to view the after image of the non-surviving profile.

Figure 22 Transaction History for Unmerge

About Transaction History Search Fields

The fields located on the Transaction History Search page allow you to specify search criteria for the transactions you want to view. The System field allows you to narrow the search to only the records within a specific entity of the organization. Note that the "Lookup By Local ID" section is customizable and may have been changed for your implementation.

Table 5 Transaction History Search Fields

In this field …	type or select …
Lookup By Local ID Section	
System	The system code of the system in which the local ID is known.
Local ID	The local ID corresponding to the record you want to find and the system code selected in the previous field. This field name may be different for your implementation.
Search Criteria Section	
EUID	The object's enterprise-wide unique global identifier assigned by the master index.
Function	The type of transaction that caused the object's profile to change. See **Table 7 on page 50** for more information about transaction types.
From Date	The beginning date for the search. The query is performed for transactions that fall between the **From Date** and **To Date**.
From Time	The beginning time for the search. The query is performed for transactions that fall between the **From Time** and **To Time** on the specified dates.
To Date	The ending date for the search.

Table 5 Transaction History Search Fields

In this field …	type or select …
To Time	The ending time for the search.
System User	The logon ID of the user who performed the transaction for which you are searching.

About Transaction History Results Fields

The fields located on the Transaction History Result page help you to identify a specific object profile and transaction to view. Additional fields may be added to this page by the system administrator.

Table 6 Transaction History Results Fields

This field …	displays this information …
Transaction No	The sequential identification code of the transaction that cause the transaction history record.
EUID1	The enterprise-wide unique identification number of the first object profile involved in the transaction.
EUID2	The enterprise-wide unique identification number of the second object profile involved in the transaction.
System	The name of the system in which the transaction that created the transaction history record occurred.
LID1	The local ID of the first system record involved in the transaction.
LID2	The local ID of the second system record involved in the transaction. This is only used for system record merges, unmerges, and transfers.
Function	The type of transaction that changed the object profile and caused the transaction history record to be written. See Table 7 for a description of each transaction type.
System User	The logon ID of the user who performed the transaction.
Timestamp	The date and time the transaction occurred.

Transaction History Transaction Types

Each transaction performed by the master index is assigned a transaction type, indicating the type of action that was performed. Table 7 lists and describes each transaction type.

Table 7 Transaction Type Descriptions

Transaction Type	Description
Add	This transaction type is assigned when a new object profile is added to the database, whether it is through a direct add or through reversing an assumed match.
EUID Activate	This transaction type is assigned when a deactivated object profile is reactivated.

Table 7   Transaction Type Descriptions

Transaction Type	Description
EUID Deactivate	This transaction type is assigned when an active object profile is deactivated.
EUID Merge	This transaction type is assigned when two object profiles are merged.
EUID Unmerge	This transaction type is assigned when two object profiles are unmerged.
System Record Merge	This transaction type is assigned when two system records are merged.
System Record Transfer	This transaction type is assigned when a system record is transferred from one object profile to another.
System Record Unmerge	This transaction type is assigned when two system records are unmerged.
Update	This transaction type is assigned when an object profile is modified in any way other than those described above. This includes such transactions as modifying an object profile, reversing an assumed match, deactivating or reactivating a system record, and adding or removing a child object (such as an address or telephone number).

4.3.2 Comparing Object Information

Using the Comparison function of the EDM, you can compare two object profiles side-by-side to check for similarities and differences. You can also compare different components of the same object profile. Select the type of information to view, and whether to view SBR or system record information, from the EUID trees.

Comparing two Object Profiles

To compare two different object profiles, you must perform a search for the profiles to compare and then select them from the results list. The Comparison page contains an EUID tree on each side of the page, one for each profile you are comparing.

**Figure 23**   Comparison Page - Two Object Profiles
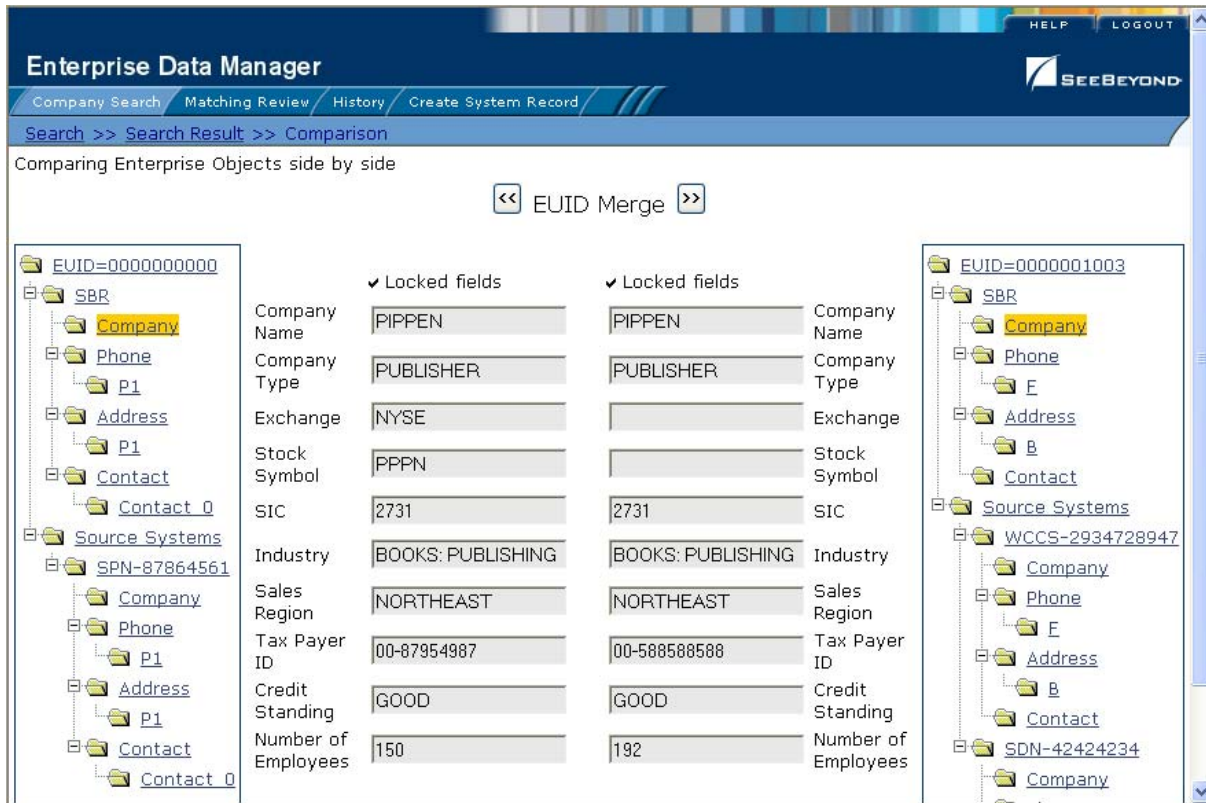
To compare two object profiles

1   Perform a search for the object profiles you want to compare, as described in
    Chapter 3, **"Searching for Object Profiles"**.

Note: *If you know the EUIDs of the object profiles to compare, use the Comparison Lookup
          to retrieve those profiles.*

2   On the search results list, select the check boxes to the left of the two object profiles
    you want to compare.

Figure 24 Selecting Two Profiles to Compare
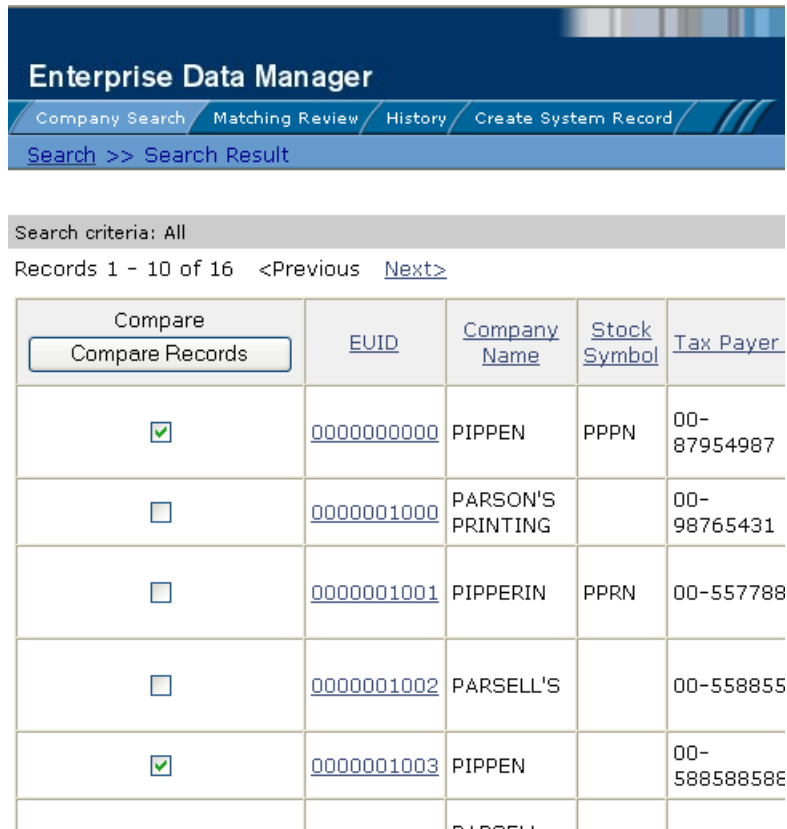
3 In the first cell of the results table, click **Compare Records**.

   The Comparison page appears with SBR information displayed.

4 To view and compare different types of information, select the type of information you want to view from the EUID trees on both sides of the page (for more information, review the instructions under **"Viewing Object Profiles" on page 43**).

5 To merge object information, do either of the following:

   ◆ To combine the two object profiles, see **"Merging Object Profiles" on page 93**.

   ◆ To combine two system records in the displayed object profiles, see **"Merging System Records" on page 94**.

Comparing Records in one Object Profile

To compare different components of one object profile, you must perform a search for that profile and then select it from the results list. The Comparison page contains an EUID tree on each side of the page, both containing the most current version of the profile you are comparing.

Figure 25   Comparison Page - One Object Profile
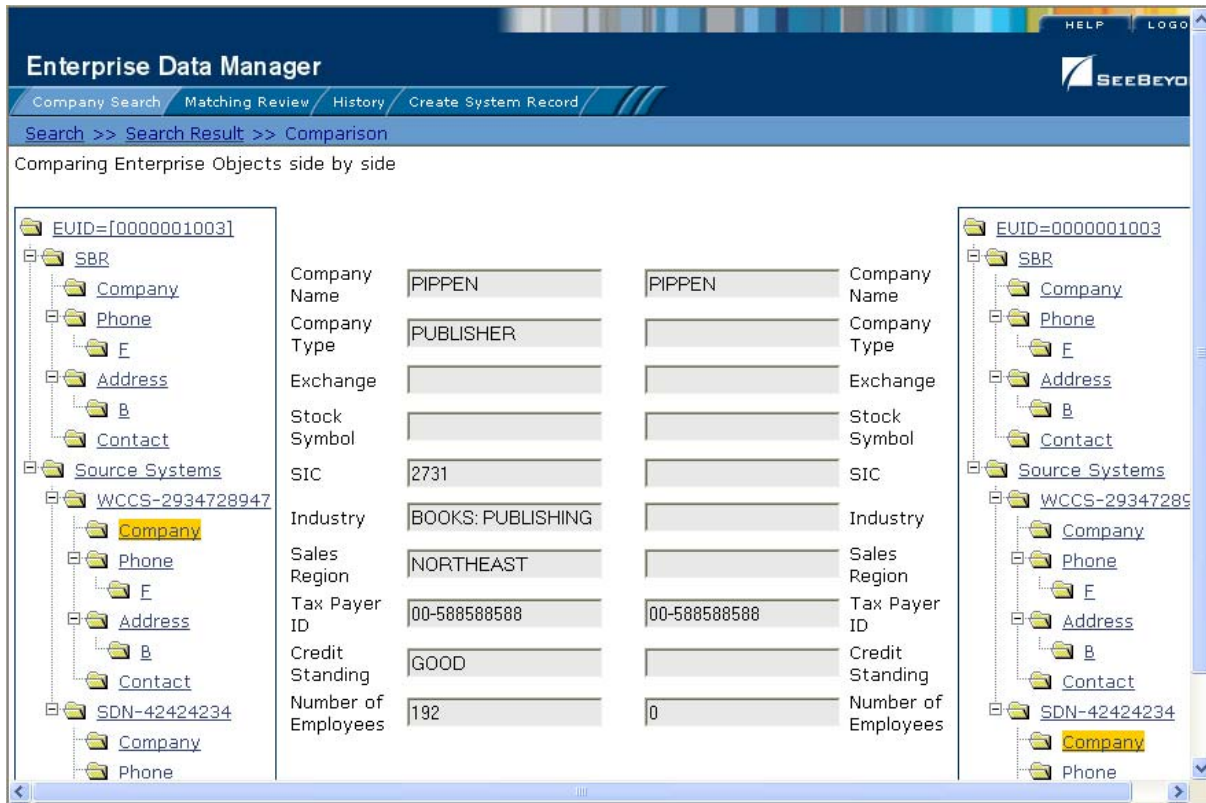
To compare records in one object profile

1   Perform a search for the object profile you want to view, as described in **Chapter 3**, **"Searching for Object Profiles"**.

2   On the search results list, select the check box to the left of the object profile you want to compare.

Figure 26   Selecting one Profile to Compare

3   In the first cell of the results table, click **Compare Records**.

The Comparison page appears with SBR information displayed.

4   To view and compare different types of information, select the type of information you want to view from the EUID trees on both sides of the page (for more information, review the instructions under **"Viewing Object Profiles" on page 43**).

5   To merge two system records in the displayed object profile, see **"Merging System Records" on page 94**.

4.4   Viewing a Merge History

When you have an object profile displayed on the Transaction History page, you can display a history of all merges performed against the profile, allowing you to trace the origin of certain information contained in the profile. You can view a history for each merge transaction in the merge history tree.

4.4.1 **Viewing a Merge History Tree**

The master index tracks all merges performed against each object profile in the database. You can view a history of merges that affect a specific object profile, and view each EUID that was merged to form the final merge result profile. The merge history appears in a tree structure in the left portion of the Merge History page, showing each pair of profiles that were merged under the displayed object profile. In the right portion of the page, transaction details are displayed for the EUID that is highlighted in the EUID tree.

Figure 27 Merge History Tree

To view an object's merge history

1 On the Transaction History Search page, perform a search for the object whose merge history you want to view (for more information, see **"Viewing a Transaction History" on page 45**).

2 On the Transaction History Result page, click the transaction number to the left of the EUID whose merge history you want to view.

The Transaction History page appears.

3 In the upper portion of the page, click **Merge Tree**.

The Merge History page appears with the merge tree on the left and transaction summaries in the right.

    4 To view a summary of merge transactions for a merged profile, select the EUID of that profile in the merge tree on the left.

       The transaction summary appears in the right portion of the page.

    5 To view transaction information for two merged profiles, click the profile above the merged pair.

       Transaction information appears in the right portion of the page.

4.4.2 Viewing an Object Profile From a Merge History Tree

When you view an object's merge history, you can also view a transaction history of any merged pair in the merge history list. The profiles you display from the merge history list contain the information about the profile before the merge occurred.

To view an object profile from a merge history tree

    1 Display a merge history tree, as described in **"Viewing a Merge History Tree"** earlier in this section.

    2 Expand the merge history tree in the left portion of the Merge History page until you see the EUID of the object profile you want to view, and then highlight that EUID.

    3 In the transaction list in the right portion of the page, click the transaction ID for the merge transaction you want to view.

       The Transaction History page appears, displaying transaction details for the transaction you selected.

4.5 Viewing the Audit Log

Using the Audit Log function, you can view a record of each instance an EDM user accessed information about any object in the master index database. The audit log includes instances in which an object profile appeared in a search results list; was viewed or compared; was added, updated, or deactivated; or was merged or unmerged.

Figure 28   Audit Log Detail page
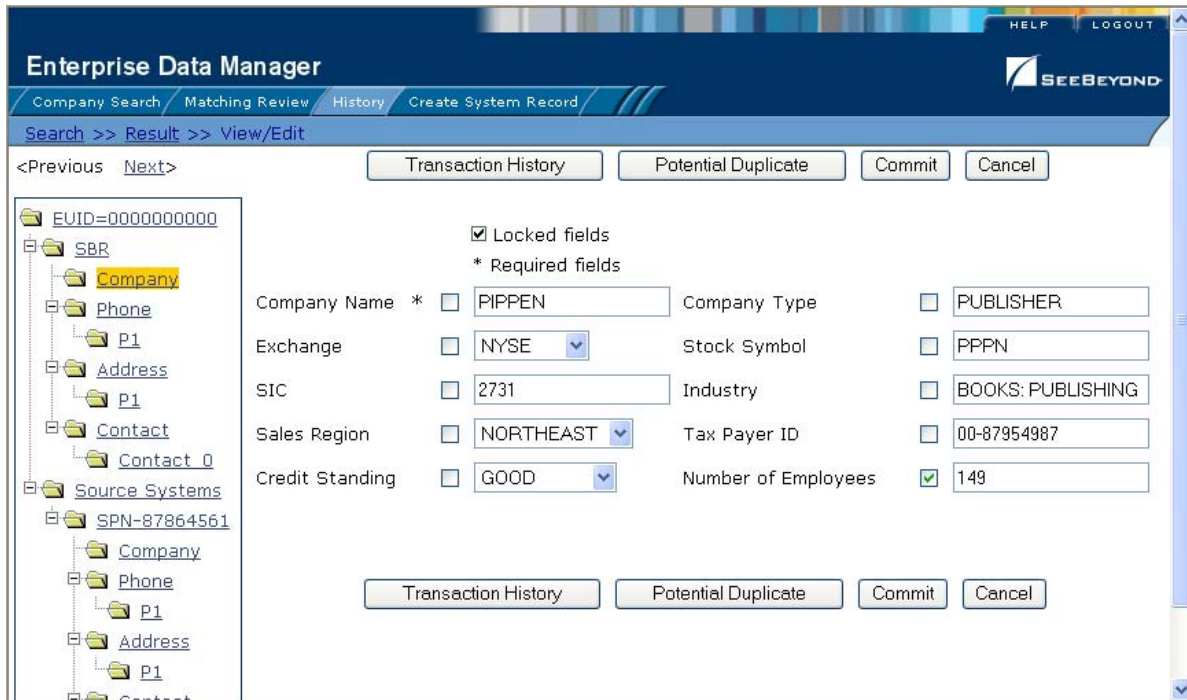
To view the audit log

1   Obtain information about the instances you want to view, such as the EUID, a time frame for when they occurred, the type of function that caused the audit log entries, the user who performed the functions, and so on.

2   On the EDM main menu, click **History**.

The History Search page appears with the Transaction History Search page displayed.

3   Select **Audit Log History** from the **Search Type** drop-down list.

Figure 29 Audit Log Search Page

4   On the Audit Log Search page, enter the search criteria for the audit log entries you want to view (for more information see **"About Audit Log Search Fields"** following this procedure).

5   In the right portion of the page, click **Search**.

The Audit Log Result page appears with a list of instances in which the data was accessed. For information about the fields displayed on this page, see **"About Audit Log Results Fields"** following this procedure.

Figure 30 Audit Log Result page

6 To view additional information about a specific Audit Log entry, click an EUID in the row containing the entry you want to view.

The View/Edit page appears.

7 To view details for the previous entry in the results list, click **<Previous**.

8 To view details for the following entry in the results list, click **Next>**.

About Audit Log Search Fields

The fields located on the Audit Log Search page allow you to enter search criteria about the audit log entries you want to view.

Table 8 Audit Log Search Fields

In this field …	type or select …
EUID	The object's enterprise-wide unique global identifier assigned by the master index.
Type	The category type for the records whose audit log entries you want to view.
Function	The type of transaction that created the audit log entries you want to view. For more information about transaction types, see **Table 10 on page 62**.
Create User	The logon ID of the user whose transactions you want to view.

Table 8   Audit Log Search Fields

In this field …	type or select …
From Date	The beginning date for the search. The query is performed for audit log entries that fall between the **From Date** and **To Date**.
From Time	The beginning time for the search. The query is performed for audit log entries that fall between the **From Time** and **To Time** on the specified dates.
To Date	The ending date for the search.
To Time	The ending time for the search.

About Audit Log Results Fields

The fields located on the Audit Log Result page display information about the instances in which object data was accessed, where those instances match the search criteria you entered.

Table 9   Audit Log Results Fields

This field …	displays this information …
Audit ID	The unique ID code in the audit log for the audit log entry.
EUID1	The EUID of the first object profile whose information was accessed.
EUID2	The EUID of the second object profile whose information was accessed in the same transaction (as would occur in the case of a profile comparison or merge).
Type	The category type of the object represented by the EUID.
Function	The primary transaction type that was used to access information. For more information about transaction types, see Table 10.
Detail	Specific information about the actions taken against the profile, such as the EDM page that was accessed or the type of function performed against a profile.
Create User	The logon ID of the user who accessed the information.
Create Date	The date and time that the information was accessed.

Audit Log Functions

The audit log creates an audit entry whenever data is accessed through the EDM. Table 10 lists and describes each audit log function. Some of these functions refer to the actual viewing of data on an EDM page; others refer to an action taken against that data, such

as clicking the merge or unmerge **Confirm** button or resolving a potential duplicate pair.

Table 10 Audit Log Function Descriptions

Audit Log Function	Description
Add	A user added a new object profile to the database from the Create System Record page or by reversing an assumed match.
Associated Potential Duplicates	A user viewed profile summaries on the Associated Records page of a potential duplicate search.
Assumed Match Comparison	A user viewed two assumed match profiles on the Assumed Match page.
Audit Log Search Result	A user viewed profiles on the Audit Log Search Result page after performing an Audit Log search.
Auto Resolve	A user permanently resolved two potential duplicate records on the Potential Duplicate Comparison page.
EO Comparison	A user viewed two object profiles on the Comparison page.
EO Search Result	A user viewed profile summaries on the Search Results page after performing a search for object profiles.
EO View/Edit	A user viewed an object profile on the View/Edit page.
EUID Merge Confirm	A user initiated a merge of two object profiles. This function refers to when the user views the merge result prior to clicking **Confirm**.
EUID Unmerge	A user finalized an unmerge of two object profiles.
EUID Unmerge Confirm	A user initiated an unmerge of two object profiles. This function refers to when the user views the unmerge result prior to clicking **Confirm**.
History Comparison	A user compared the before and after image of a object profile on the Transaction History Comparison page.
History Search Result	A user viewed the results of a transaction history search on the Transaction History Search Results page.
LID Merge - Selection	A user initiated a merge of two system records. This function refers to when the user has selected **LID Merge** but has not finalized the merge.
LID Merge Confirm	A user finalized a merge of two system records.
LID Unmerge	A user finalized an unmerge of two system records.
LID Unmerge Confirm	A user initiated an unmerge of two system records. This function refers to when the user views the unmerge result record prior to clicking **Confirm**.
Merge	A user finalized a merge of two object profiles or two system records.
Merge Tree Comparison	A user viewed a merge tree. This function appears for each object profile included in the merge tree.
Potential Duplicate Comparison	A user viewed two object profiles on the Potential Duplicate Comparison page.

Table 10 Audit Log Function Descriptions

Audit Log Function	Description
Resolve	A user resolved two potential duplicate records on the Potential Duplicate Comparison page.
Undo Assumed Match	A user reversed an assumed match.
Unmerge Comparison	A user initiated an unmerge of two system records or two object profiles. This function refers to when the user views the unmerge result record prior to clicking **Confirm**.
Unresolve	A user unresolved two object profiles on the Potential Duplicate Comparison page.
Update	A user modified a profile on the View/Edit window. Updates include any changes made to a profile, including activating and reactivating system records, adding or removing child objects, and so on.
View Merge Tree	A user viewed a merge tree.

Maintaining Object Profiles

The EDM allows you to monitor and maintain information in the master index database, including adding, updating, merging, and unmerging records. This chapter presents the background information and the step-by-step instructions you need to add and maintain information using the EDM.

The appearance of your EDM will vary from the illustrations depending on how your application is configured.

What's in This Chapter

- **Object Profile Maintenance** on page 64
- **Adding an Object Profile** on page 68
- **Maintaining Object Information** on page 72

5.1 Object Profile Maintenance

Object profile maintenance involves a number of tasks that you can perform to ensure that your database contains the most current and accurate information. The tasks you can perform include editing, adding, and deleting information, detecting and fixing profiles that are potential duplicates of each other, merging and unmerging object profiles or system records, and deactivating object profiles or system records that are no longer active.

5.1.1 Matching Probability Weights

When you add a new object profile to the master index, the new profile is automatically checked for any similarities between profiles that already exist in the database. A matching probability weight between existing profiles and the new profile is then calculated using matching algorithm logic. This weight indicates how closely two profiles match each other. If the matching probability weight for two profiles is above a specific number (defined in the eView configuration files), the profiles are considered to be potential duplicates. If the weight between two profiles is high enough, they might be automatically merged (for more information, see **"Assumed Matches" on page 66**).

5.1.2 # Merging Profiles

As described above, you can merge object profiles that are found to represent the same object, and you can merge system records between object profiles. During a system record merge, you can specify which fields from each record to retain in the final, merged system record. After an object profile merge, all information from all the system records involved in the merge are stored in the surviving profile. You may need to review the final merge result profile to determine which, if any, system records should be deactivated.

The SBR for the surviving profile is determined by the survivor calculator, taking into account all system records involved in the merge. If you merge two profiles that have duplicate child objects (for example, each profile has an Office address) and the union survivor calculator is used, then the most recently modified of the two child objects is stored in the SBR.

Surviving and Non-surviving Profiles

When you perform an object profile merge, you are working with two object profiles. The *non-surviving profile* is the profile that is not retained after the merge. The *surviving profile* is retained after the merge. During an object profile merge, the system records in the non-surviving profile are transferred to the surviving profile, and the non-surviving profile is given a status of "Merged". The SBR for the surviving object profile is recalculated based on the existing system records for that profile along with the newly merged system records. The EUID of the surviving profile is always retained. The information that is discarded during a merge is stored in the transaction table, making it possible to restore the profiles to their previous status if they were merged in error.

System Record Merges

You can merge two system records together if they originated from the same system. If you merge the only active system record in an object profile into another system record, that object profile will be deactivated (since there are no active system records remaining, there is nothing from which to create the SBR). The object profile from which the system record is merged is called the *merge from* profile. The object profile into which the system record is merged is called the *merge to* profile. During a system record merge, you can select fields from the non-surviving system record to be retained in the surviving system record.

Undoing a Merge

If you merge two object profiles or system records in error, you can unmerge the profiles or records, moving the information back into the original member profiles or system records. Any modifications that were made to the surviving object profile or system record after the merge are retained after the profiles or records are unmerged. If a system record merge caused the "merge from" object profile to be deactivated, unmerging the system records reactivates that profile.

Assumed Matches

If you add a new object profile and the master index determines that the object you are adding already exists in the database, the master index assumes the profiles are a match and updates the existing object profile. This is known as an *assumed match* or an *automatic merge*. An assumed match only occurs when the probability of a match between the new profile and the existing profile is above the match threshold specified by your system administrator.

5.1.3 Potential Duplicates

Potential duplicates are two object profiles that possibly represent the same object. If you add a new object and the master index determines that the object you are adding may already exist in the database, the two profiles are listed as potential duplicates of one another. Profiles are listed as potential duplicates if the probability of a match between the two profiles is above the duplicate threshold but below the match threshold. Because object information is entered from various sources, an object profile may have several potential duplicates. In this case, it is important to identify the potential duplicates, and to determine whether the profiles represent the same object.

5.1.4 Handling Potential Duplicates

The Matching Review function allows you to locate any profiles that are similar enough that they could represent the same object. You can compare potential duplicate profiles side-by-side to determine if they do represent the same object. Once you have determined whether the profiles are duplicates, you can use one of the following methods to correct the potential duplicate listing.

Merge

If you conclude that the profiles represent the same object, you need to determine which EUID to retain, and then merge the profiles. For a description of the merge process, see **"Merging Profiles" on page 65**.

Resolve

If you conclude that two potential duplicate profiles do not represent the same object, you can mark the profiles as being resolved. Doing this does not change any information for either profile, but it flags them as not being potential duplicates of one another. There are two methods of resolving potential duplicates.

- **Resolve**
  This type of resolution allows the profiles to be listed as potential duplicates again if one of the profiles is updated and, after its potential duplicates are re-evaluated, the profiles still have a matching weight above the duplicate threshold.

- **Resolve Permanently**
  This type of resolution marks the profiles as not being duplicates, and does not allow the pair to be listed as duplicates after any future updates to either record. This is a permanent resolution.

5.1.5 **Update Tips**

This section discusses special circumstances for updating object profiles, such as what happens when two users update the same profile at the same time and how the SBR is updated versus system records.

Concurrent Users

If you have the same object profile open for editing as another EDM user, only the user who commits their changes first will be able to save their changes. If you try to commit changes after the first user clicks **Commit**, the following error message appears and you will be unable to commit your changes.

Unable to update: Enterprise Object has been modified by another client.

In order to update the profile with your changes, you must reload the profile by performing a search for that profile. You can then edit the profile and commit your changes.

Updating the SBR versus System Records

Every time a system record is updated, the survivor calculator determines whether the new information should be populated into the SBR. This includes updates from the EDM and from local systems. Typically, when you update information in an object profile, you update the system record, which kicks off the survivor calculator. However, the EDM also allows you update the SBR directly by selecting an "overwrite" check box. Use this capability cautiously, since fields updated in the SBR cannot be overwritten by new information from local systems until the overwrite check box is deselected. You can only update an SBR, or select or clear the overwrite check box, if you have explicit security permissions to do so.

EDM Overwrite Capabilities

EDM overwrite capabilities allow you to override the survivor calculator's version of the SBR and update the SBR directly. The overwrite is accomplished by selecting the overwrite check box for each field you update in the SBR. If you update an SBR field, the overwrite check box is automatically selected so you can save the changes to the database (if you have SBR update permission).

When you update an SBR from the EDM and select the overwrite check boxes next to the updated fields, the fields are automatically updated in the SBR, regardless of the value specified by the survivor calculator. In addition, those fields become "locked" and cannot be updated by any system messages or the survivor calculator until the overwrite check boxes are cleared. When a field is unlocked, the survivor calculator immediately recalculates the best value for that field based on the system records in the object profile.

If a field in a child object, such as the Address or Phone object, is locked, then the key field (in this case, Address Type or Phone Type), is automatically locked. When you add a child object (such as a telephone number or address) directly to the SBR, all fields in that object are automatically locked and cannot be overwritten by the survivor calculator.

5.2 Adding an Object Profile

This section provides the step-by-step instructions you need in order to add object profiles to the master index database. When you add an object profile, you are actually creating a system record. The master index calculates the SBR portion of the object profile as you create the system record. Adding an object profile includes the following steps:

- **Step 1: Obtain Information about the Object** on page 68
- **Step 2: Specify a System and Local ID** on page 68
- **Step 3: Specify Parent Object Information** on page 70
- **Step 4: Specify Child Object Information** on page 70
- **Step 5: Save the Object Profile** on page 71

5.2.1 Step 1: Obtain Information about the Object

Before you begin to add a new object to the master index, you should obtain certain information about the object. If necessary, review the fields displayed on the pages of the EDM to learn what types of information you should know. You should provide as much information as is available for each object.

5.2.2 Step 2: Specify a System and Local ID

Each object profile is associated with at least one system record. Before you add data to an object profile, you must specify the object's local ID in a specific system. This creates the system record component of the object profile.

Figure 31 Create System Record - System and Local ID
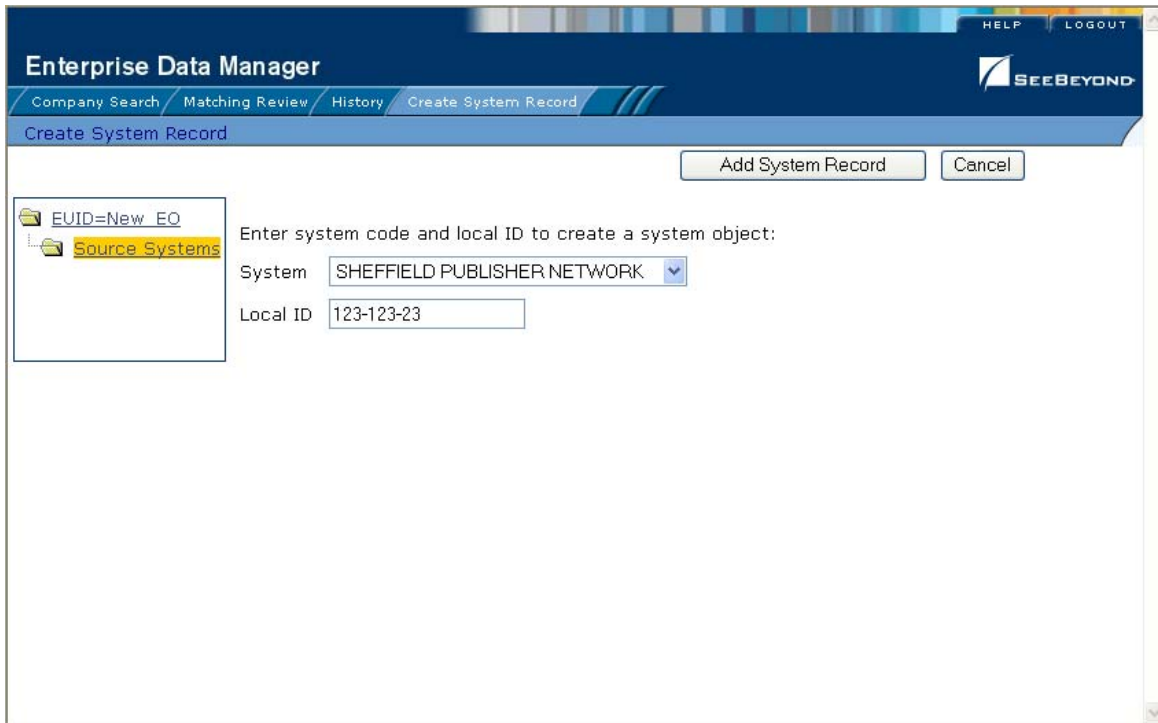
To specify a system and local ID

1 Complete **"Step 1: Obtain Information about the Object"**.

2 On the EDM main menu, select **Create System Record**.

The Create System Record page appears.

3 On the Create System Record page, enter system information for the new object (for more information, see **"About System Fields"** following this procedure).

4 Click **Add System Record**.

The page changes to display parent object fields.

5 Continue to **"Step 3: Specify Parent Object Information"**.

About System Fields

The fields located on the first page of the Create System Record page allow you to specify system information for the object you are adding.

Table 11 System and Local ID Fields

Field	Description
System	The name of the system that assigned a local ID to the object.
Local ID	The local ID assigned to the object by the system specified. Note that the name of this field might have been modified for your implementation.

5.2.3 **Step 3: Specify Parent Object Information**

When you add a new object profile to the master index database, you need to enter certain information about the object. The required information varies depending on the type of objects in the index and the configuration of the application.

Figure 32   Create System Record - Parent Object

To specify parent object information

1   Complete **"Step 2: Specify a System and Local ID"**.

The parent object of the system record should be displayed.

2   On the Create System Record page, fill in the open fields.

3   Continue to **"Step 4: Specify Child Object Information"**.

5.2.4 **Step 4: Specify Child Object Information**

After you specify information for the parent object in the object profile, you can add child objects to the profile.

Figure 33   Create System Record - Child Objects
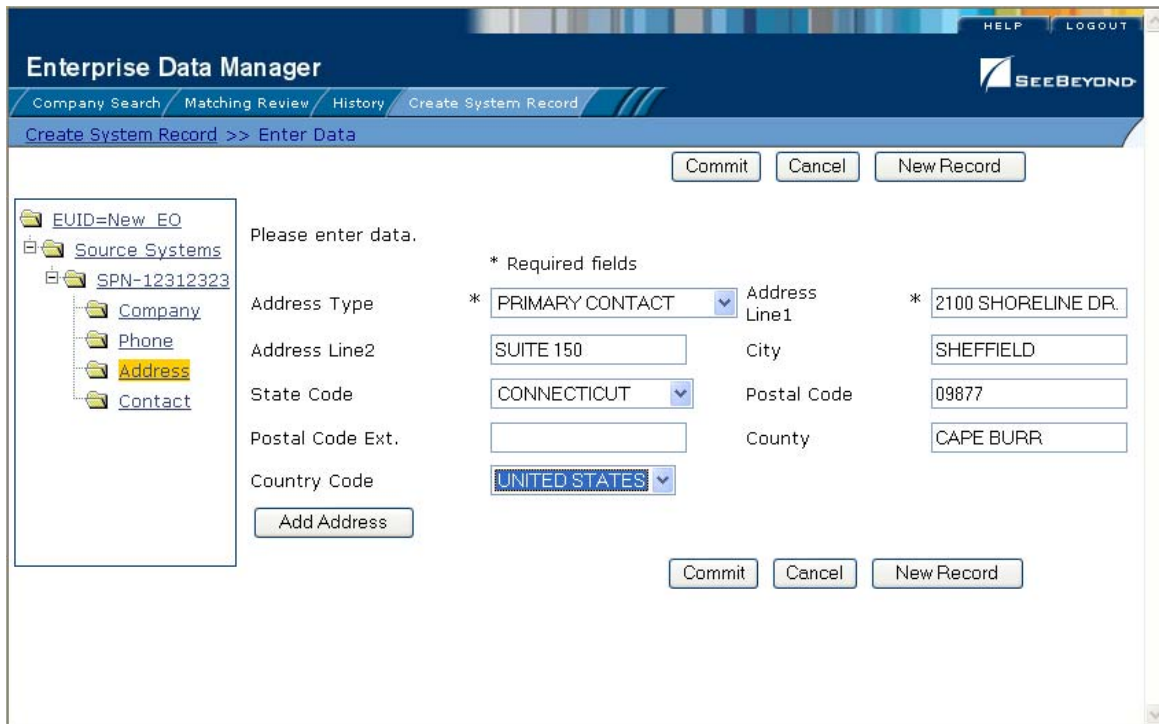
To specify information about an object

1   Complete **"Step 3: Specify Parent Object Information"**.

2   In the EUID tree, expand the **Source System** folder to display the type of child object you want to add.

    The page changes to display the fields associated with that child object type.

3   Fill in any open fields.

4   Click **Add <child_type>**, where *<child_type>* is the type of child object you are adding. For example, if you are adding an address, click **Add Address**.

5   Continue to **"Step 5: Save the Object Profile"**.

5.2.5   Step 5: Save the Object Profile

After you have specified all of the required information for an object profile, you must save the profile to the database or the information you entered will be lost.

To save the object profile

1   Complete **"Step 4: Specify Child Object Information"**.

2   Click **Commit**.

    A confirmation dialog appears.

> *Note:* *The confirmation dialog informs you whether a new profile was added to the database, a new profile was added and it has potential duplicates, or an existing profile was updated with the information you entered.*

3   On the confirmation dialog, click **OK**.

The new object profile is saved to the database.

4   To add another object profile, click **New Record**, and then repeat **"Step 1: Obtain Information about the Object"** through this step.

5.3   Maintaining Object Information

This section provides step-by-step instructions for maintaining up-to-date and accurate object information in your database. You can maintain information in both the SBR and the system records for an object profile. Data maintenance includes these procedures:

- Modifying parent objects
- Adding, modifying, and deleting child objects
- Adding, updating, deactivating, and reactivating system records
- Locking and unlocking SBR fields
- Deactivating and reactivating an object
- Finding, resolving, and merging potential duplicates
- Finding and reversing assumed matches
- Merging and unmerging object profiles or system records

5.3.1   Modifying Parent Object Information

If the parent object information for an object profile changes, you can update the information in either the SBR or the affected system record. If you update the system record, then the survivor calculator determines what changes, if any, should be made to the SBR. You must have overwrite permissions to update the SBR directly.

Figure 34 View/Edit Page - Parent Object
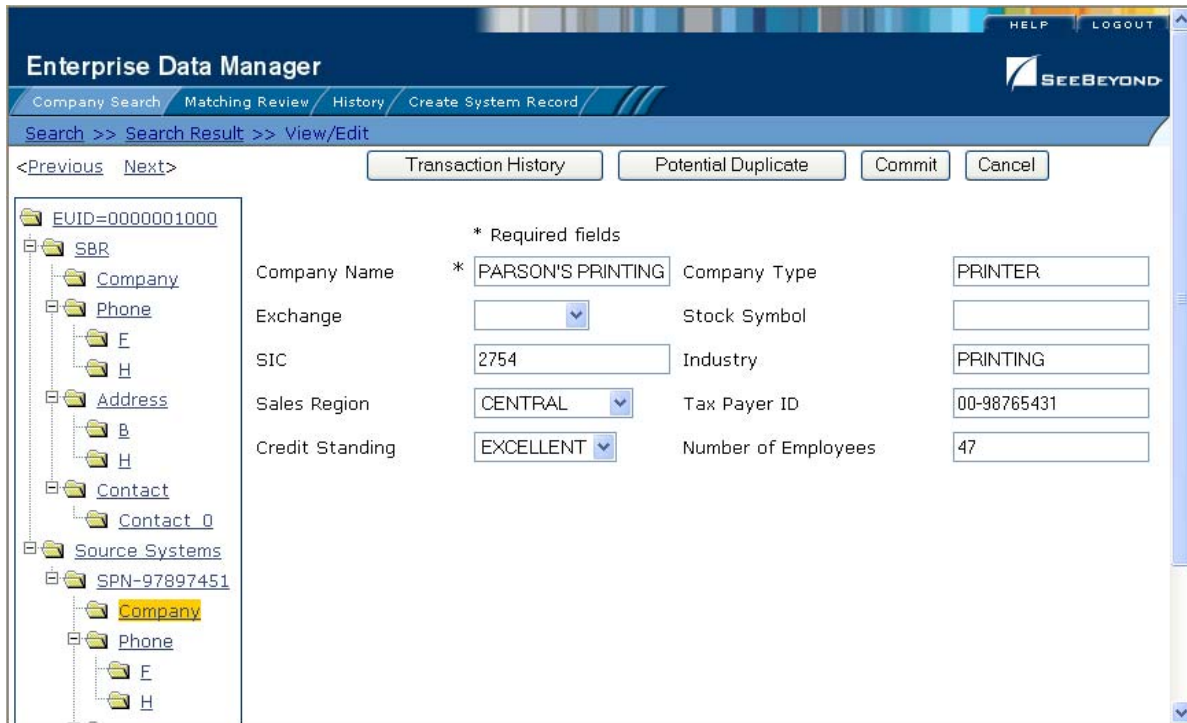
To modify parent object information
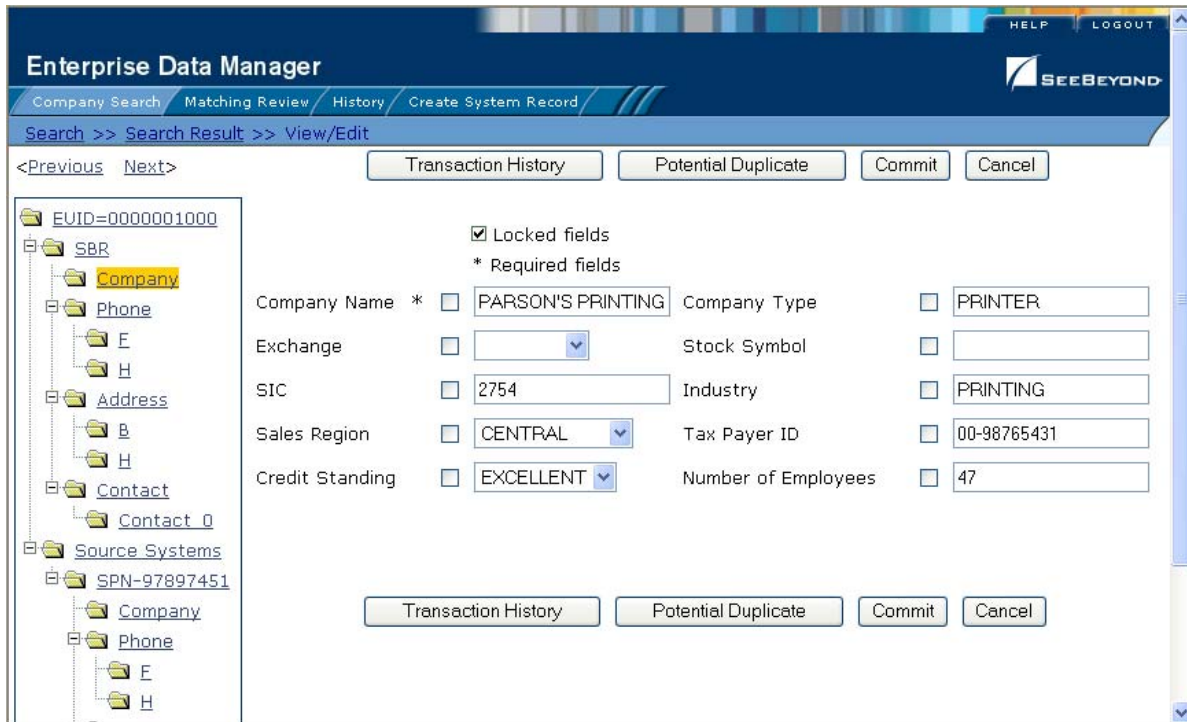
1 Using one of the search methods described in **Chapter 3**, display the object profile you want to modify on the View/Edit page.

2 Do one of the following:

  ◆ To modify the SBR, select the parent object folder under **SBR** in the EUID tree in the left portion of the View/Edit page.

  ◆ To modify a system record, select the parent object folder under that system record in the EUID tree in the left portion of the View/Edit page.

3 Modify any open fields in the right portion of the page.

4 If you are working in the SBR, make sure the overwrite check box to the left of the field is selected for each field you modify.

5 When you are done modifying information, click **Commit**.

The page refreshes, and, if you modified a system record, the SBR is recalculated based on the new information.

5.3.2 **Maintaining Child Object Information**

You can add, modify, and delete information for child objects, such as addresses or telephone numbers. If you make any of these modifications to the system record, the survivor calculator determines what changes, if any, should be made to the SBR. You can only modify this information in the SBR if you have overwrite permissions.

Figure 35   View/Edit Page - Child Objects
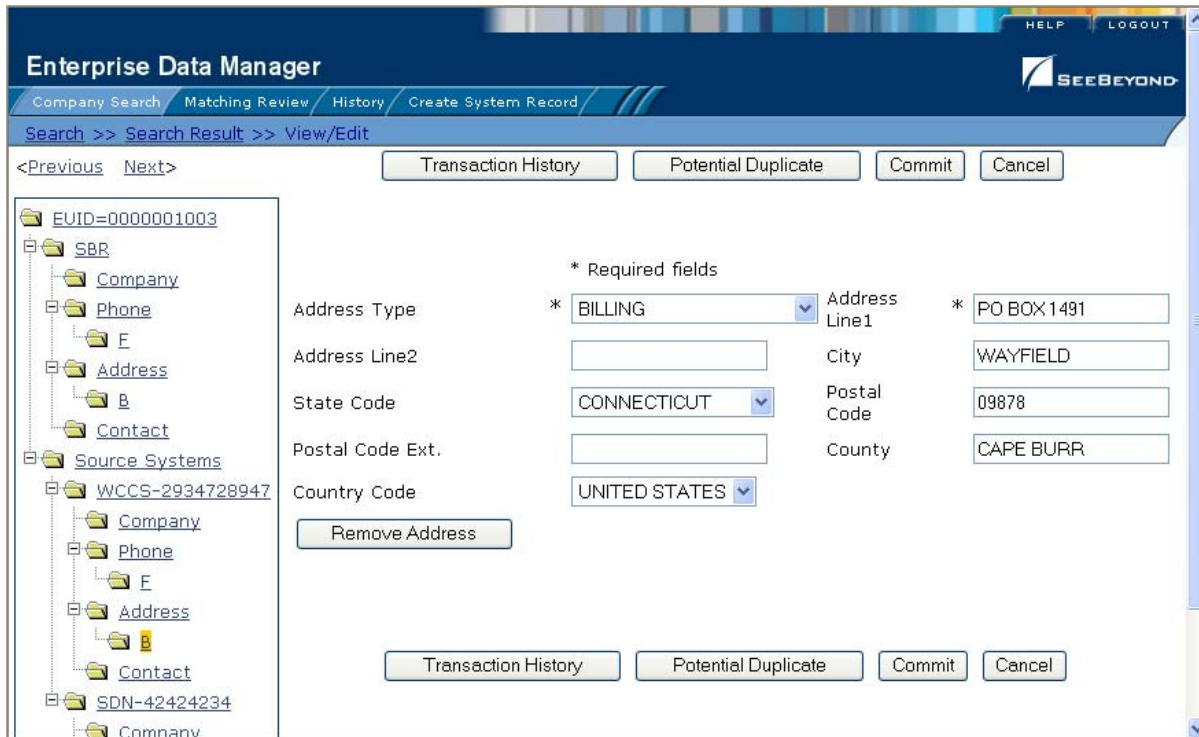
Adding a Child Object

If additional information becomes available about an object, you may need to add a new child object to the object profile. For example, if additional address information becomes available, you may need to add a new address record to the SBR or to the affected system record.

To add a child object

1   Using one of the search methods described in **Chapter 3**, display the object profile you want to modify on the View/Edit page.

2   Do one of the following:

- To add the child object to the SBR, select the child object type under **SBR** in the EUID tree in the left portion of the View/Edit page. (For example, to add an address record, select **Address**.)

- To add the child object to a system record, select the child object type under that system record in the EUID tree in the left portion of the View/Edit page.

3   Enter the new information in the fields in the right portion of the page.

4   In the lower left portion of the page, click **Add <*child_type*>** (where *<child_type>* is the type of child object you are adding).

5   Click **Commit**.

The page refreshes, and, if you modified a system record, the SBR is recalculated based on the new information.

Note: *If you added the information to the SBR, all fields in the new record are automatically locked, and will not be updated by incoming system messages until they are unlocked.*

Modifying Child Objects

If information about an object changes, you may need to modify information for an existing child object.

To modify a child object

1 Using one of the search methods described in **Chapter 3**, display the object profile you want to modify on the View/Edit page.

2 Do one of the following:

  ◆ To modify the SBR, under **SBR** in the EUID tree in the left portion of the View/Edit page, select the child object you want to modify.

  ◆ To modify a system record, under that system record in the EUID tree in the left portion of the View/Edit page, select the child object you want to modify.

3 Modify any open fields in the right portion of the page.

4 If you are working in the SBR, make sure the overwrite check box to the left of the field is selected for each field you modify.

5 When you are done modifying information, click **Commit**.

   The page refreshes, and, if you modified a system record, the SBR is recalculated based on the new information.

Deleting a Child Object

If a child object is entered incorrectly or becomes obsolete, you can delete the object from the affected system record. Child objects cannot be deleted from the SBR. Deleting a child object cannot be undone.
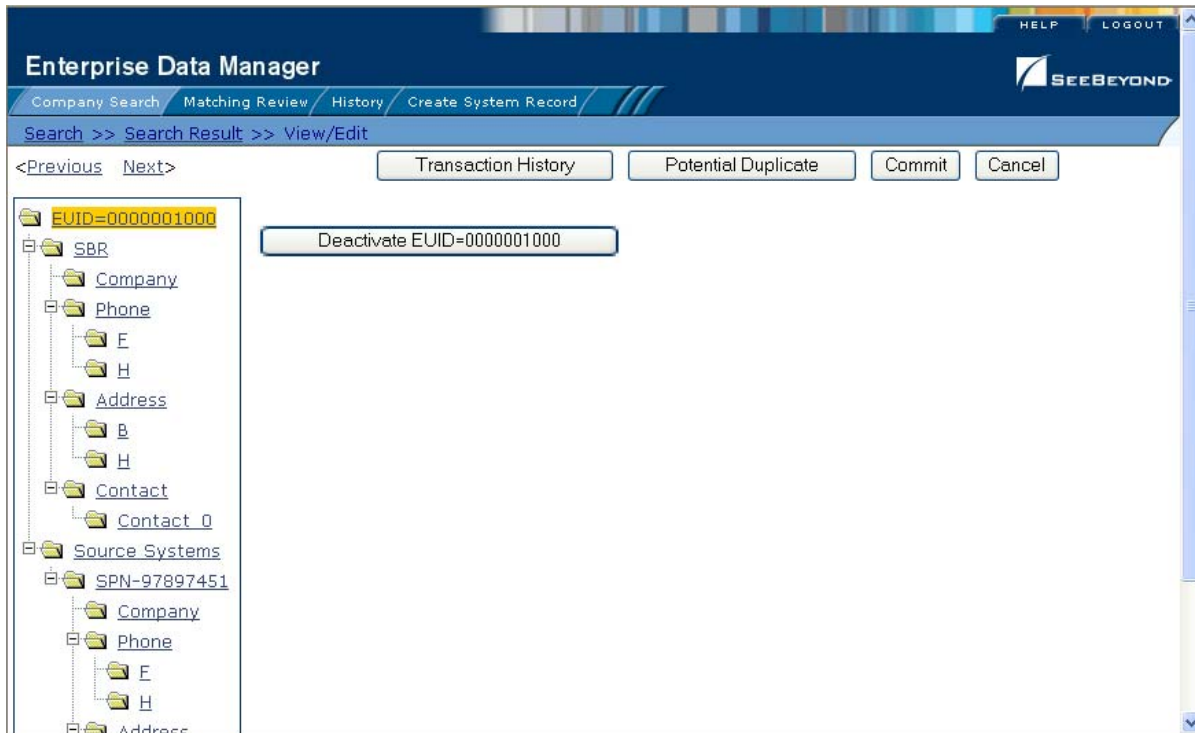
To delete a child object

1 Using one of the search methods described in **Chapter 3**, display the object profile you want to modify on the View/Edit page.

2 Under the affected system record in the EUID tree in the left portion of the View/Edit page, select the child object you want to remove.

3 In the lower left portion of the page, click **Remove <child_type>** (where *<child_type>* is the type of child object you are removing).

4 Click **Commit**.

   The page refreshes, and the SBR is recalculated based on the new information.

5.3.3 Locking and Unlocking SBR Fields

Unless a field in an SBR is locked for overwrite, the value for that field is recalculated by the survivor calculator each time the object profile is updated. If you determine that

a value in the SBR is the most accurate data and should not be updated, you can lock the field. If you unlock a locked field, the value of that field is automatically recalculated by the survivor calculator as soon as the unlock action is committed.

Locking an SBR Field

When you lock a field in an SBR, that field can only be updated through the EDM by a user who has overwrite permissions. Locking a field in the SBR removes the survivor calculator from the update process for that field, and any updates made to or by system records will not update the locked fields in the SBR.

Figure 36 Locked fields in an SBR
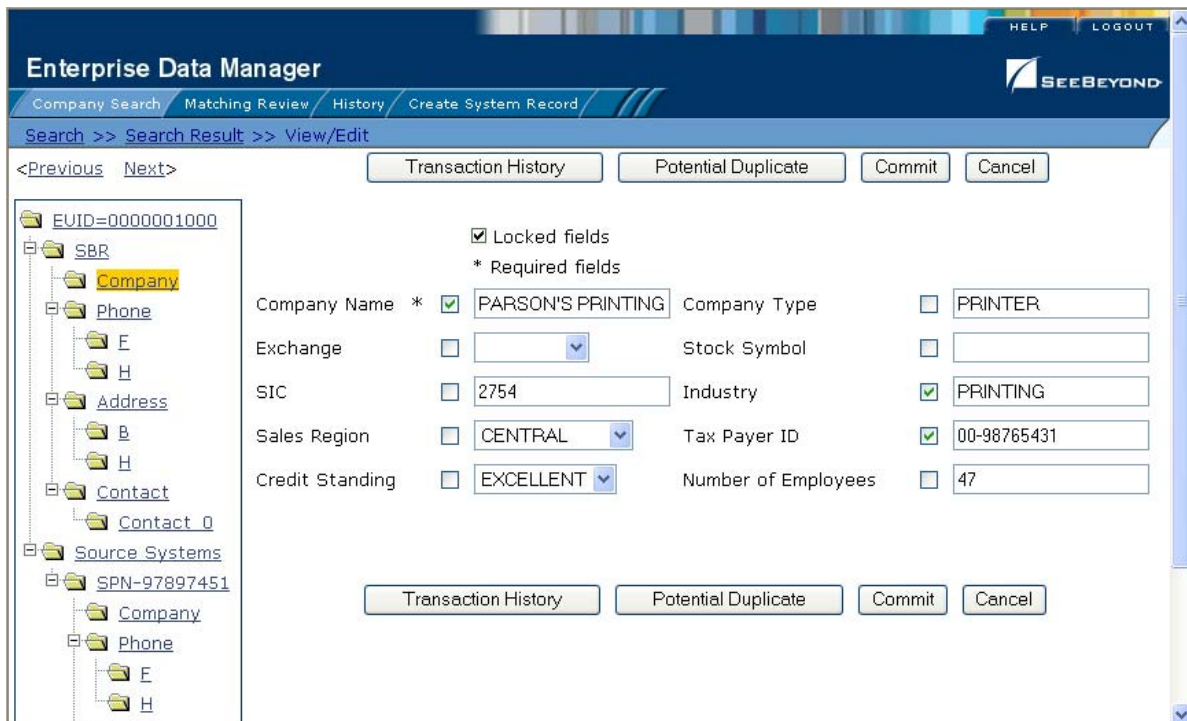
To lock a field in the SBR

1 Using one of the search methods described in **Chapter 3**, display the object profile containing the field you want to lock on the View/Edit page.

2 In the EUID tree, select the component in the SBR containing the field you want to lock.

3 If necessary, update the value of the field to be locked.

4 Select the overwrite check box to the left of the field.

5 **Commit**.

The field is now locked and cannot be edited by updates to system records until the lock is removed.

Unlocking an SBR Field

Once you unlock a field for overwrite in an SBR, the SBR is recalculated by the survivor calculator and the field can be updated by changes made to system records.

Figure 37   Unlocked Fields in an SBR

To unlock an SBR field

1 Using one of the search methods described in **Chapter 3**, display the object profile containing the field you want to unlock on the View/Edit page.

2 In the EUID tree, select the object in the SBR containing the field you want to unlock.

3 Clear the overwrite check box to the left of the field you want to unlock.

4 Click **Commit**.

The field is now unlocked and can be edited by updates to system records. The SBR is recalculated by the survivor calculator.

5.3.4 Maintaining System Record Information

You can add, modify, deactivate, and reactivate system records in an object profile. If you make any of these modifications, the survivor calculator determines what changes, if any, should be made to the SBR.

For instructions on modifying specific information in a system record, see the preceding sections, which describe how to maintain various types of information in an object profile.

Figure 38   View/Edit Page - System Records
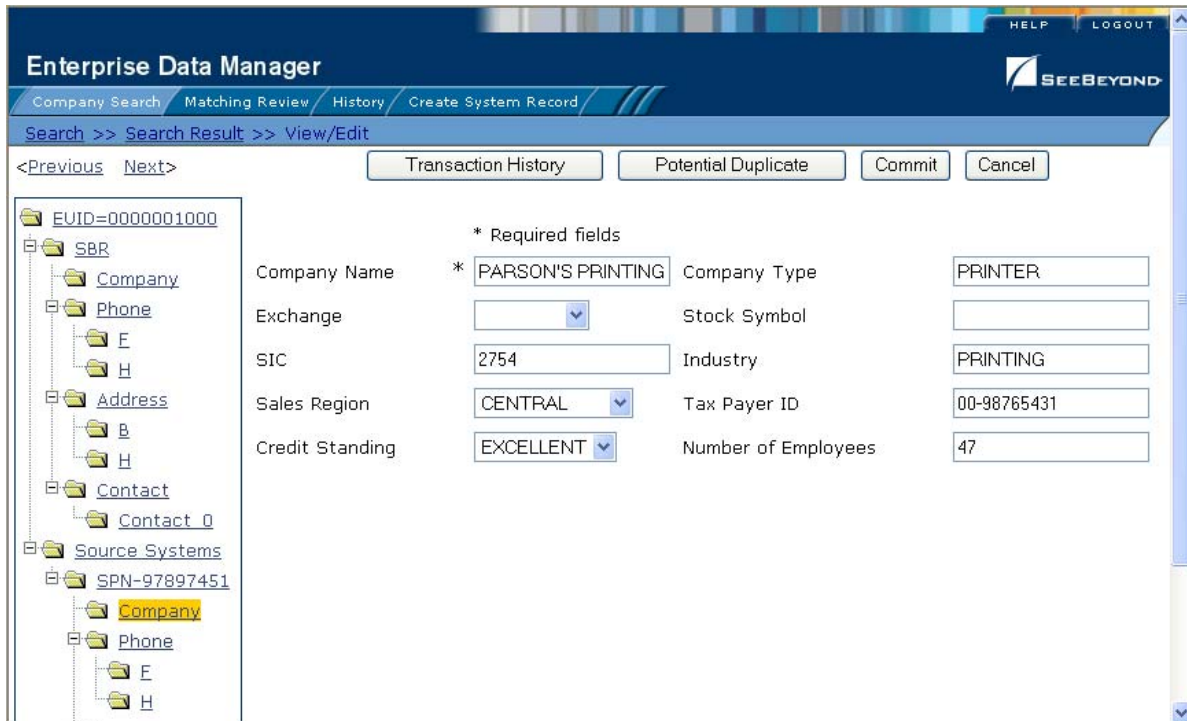
Adding a System Record to an Object Profile

If you find an object has local IDs in addition to those already recorded in the master index, you can add the local IDs to the object's profile by adding a system record to the profile. To add a local ID to an object profile, you need to specify information such as the system that assigned the local ID, certain parent-object information, and the local ID. When you add a system record to an object profile, the survivor calculator determines what changes, if any, should be made to the SBR.

You cannot add a new local ID and system pair to an object profile if that same local ID and system pair already exists in another object profile.

To add a system record to an object profile

1   Using one of the search methods described in **Chapter 3**, display the object profile you want to modify on the View/Edit page.

2   In the EUID tree in the left portion of the page, select **Source Systems**.

3   Follow **"Step 2: Specify a System and Local ID"** through **"Step 5: Save the Object Profile"** under **"Adding an Object Profile" on page 68**.

When you commit the changes, the page refreshes and the SBR is recalculated based on the new information.

Note: *You only need to enter required fields in order to save the new system record.*
           Required fields are indicated by an asterisk (*).

Deactivating a System Record

If an existing local ID for an object becomes obsolete, you can deactivate the system
record with that local ID for the object profile. An object profile must have at least one
active local ID; if you deactivate an object's last active system record, the entire profile
is deactivated. When you deactivate a system record from an object profile, the survivor
calculator determines what changes, if any, should be made to the SBR.

To deactivate a system record

1 Using one of the search methods described in **Chapter 3**, display the object profile
   you want to modify on the View/Edit page.

2 In the EUID tree in the left portion of the page, expand **Source Systems**, and then
   select the system code and local ID of the system record you want to deactivate.

3 Click **Deactivate <*system-ID*>**, where *system* is the system code and *ID* is the local
   ID number for the system record you want to deactivate.

4 Click **Commit**.

   The page refreshes and the SBR is recalculated based on the new information.

Reactivating a System Record

If a system record was deactivated in error or is no longer inactive, you can easily
reactivate the system record.

To reactivate a system record

1 Using one of the search methods described in **Chapter 3**, display the object profile
   you want to modify on the View/Edit page.

2 In the EUID tree in the left portion of the page, expand **Source Systems**, and then
   select the system code and local ID of the system record you want to reactivate.

3 Click **Activate <*system-ID*>**, where *system* is the system code and *ID* is the local ID
   number for the system record you want to reactivate.

4 Click **Commit**.

   The page refreshes and the SBR is recalculated based on the new information.

5.3.5 Changing Object Profile Status

You can change the status of an object profile from active to inactive, or from inactive to
active. Deactivating an object profile deactivates all system records associated with that
profile.

Figure 39 View/Edit Page - Deactivate

Deactivating an Object Profile

If an object profile is no longer active, you cannot delete the object profile, but you can deactivate that object profile. Deactivated profiles cannot be modified, and in some cases, cannot be viewed. If you deactivate a profile in error, you can reactivate it if needed.

To deactivate an object profile

1 Using one of the search methods described in **Chapter 3**, display the object profile you want to update on the View/Edit page.

2 In the EUID tree in the left portion of the page, highlight the EUID number of the object profile.

3 Click **Deactivate EUID=<*EUID_number*>**, where **<*EUID_number*>** is the EUID of the object profile to deactivate.

4 On the Deactivate Complete dialog, click **OK**.

The profile is deactivated in the database, and a tilde (~) appears next to this EUID when it is displayed on any of the EDM pages.

Reactivating an Object Profile

If an object profile is deactivated in error, or becomes active again, you can reactivate that profile. Reactivating a profile returns the profile to its status just prior to when it was deactivated.

Important: *When you reactivate an object profile, all system records associated with that profile are changed to active status, regardless of their prior status. Review each system record to verify that its status is correct after the reactivation.*

Figure 40   View/Edit Page - Reactivate
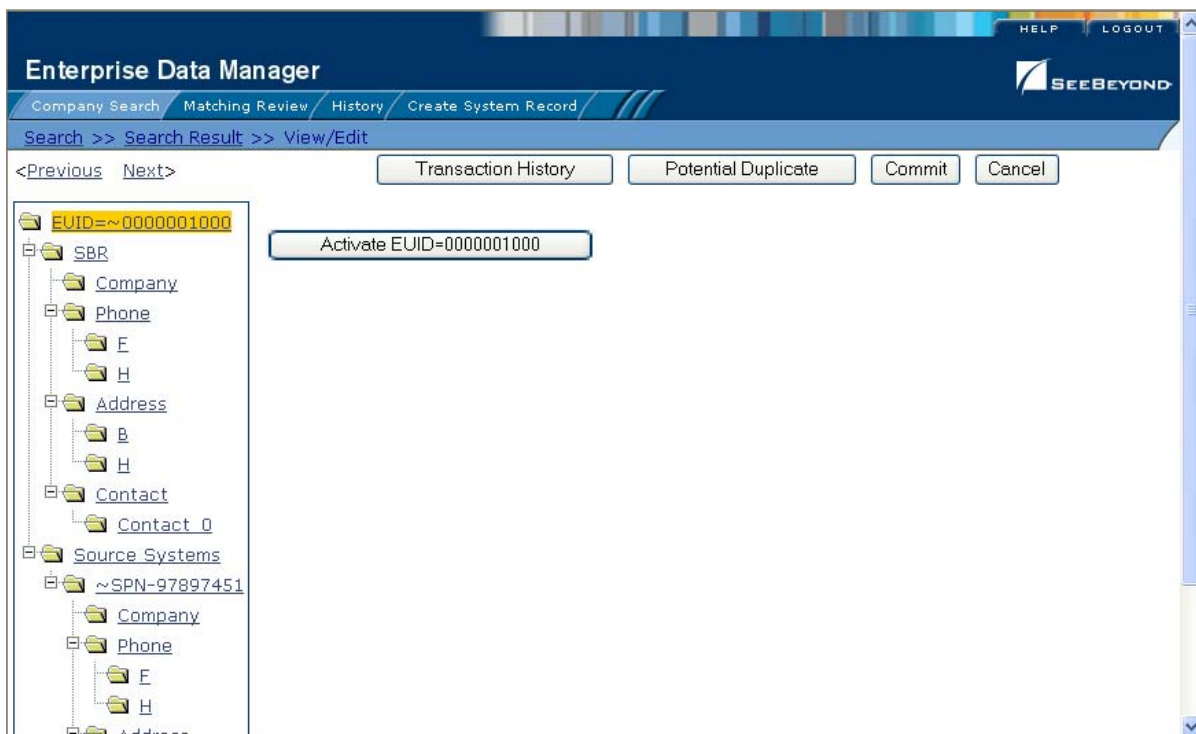
To reactivate an object profile

1   Using one of the search methods described in **Chapter 3**, display the object profile you want to update on the View/Edit page.

2   In the EUID tree in the left portion of the page, highlight the EUID number of the object profile.

3   Click **Activate EUID=<*EUID_number*>**, where **<*EUID_number*>** is the EUID of the object profile to deactivate.

4   On the Activate Complete dialog, click **OK**.

The profile is reactivated in the database, and the tilde (~) no longer appears next to the EUID when it is displayed on any of the EDM pages.

5.3.6 # Working with Potential Duplicates

The Matching Review function of the EDM allows you to view any object profiles that are marked as potential duplicates by the master index. You can also view potential duplicates that have been resolved. This section provides instructions for finding and viewing potential duplicate profiles and then fixing the potential duplication by either merging or resolving the two profiles.

Finding Potential Duplicates

You can easily find and compare potential duplicate profiles using the EDM. Potential duplicate profiles are located based on the matching probability weight that indicates how closely two profiles match.

Figure 41 Potential Duplicate Comparison Page
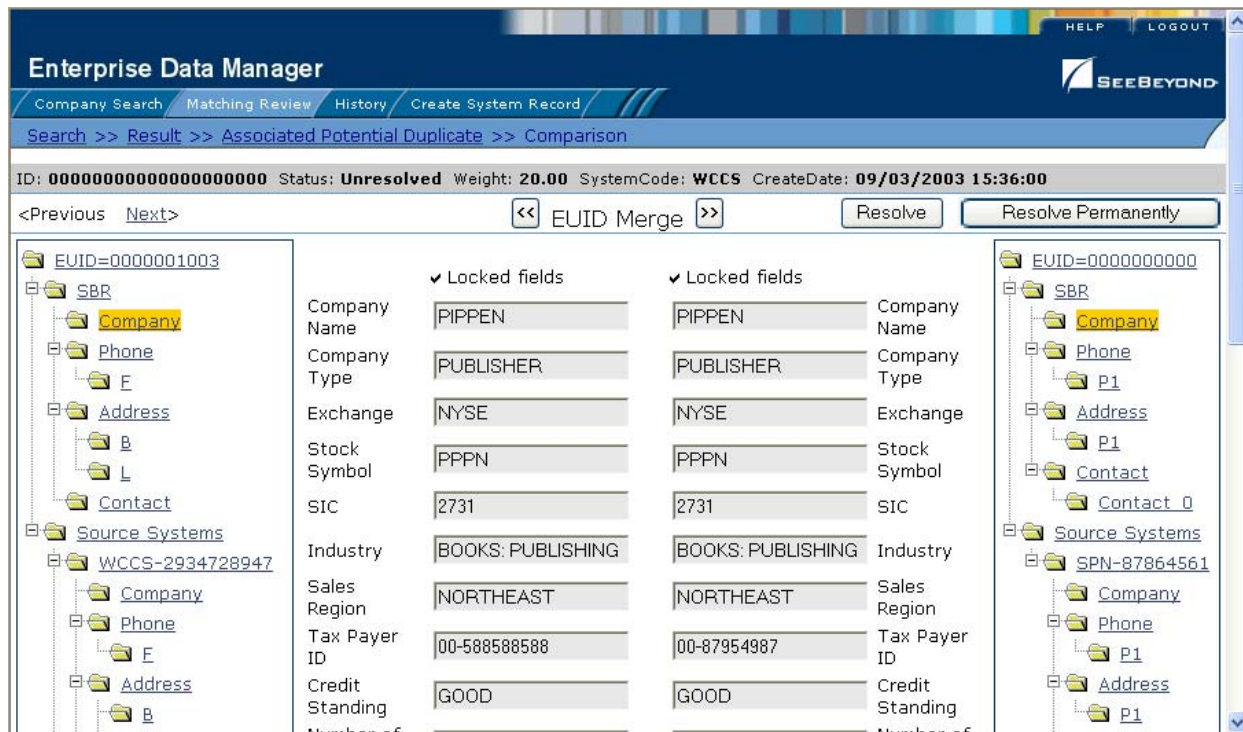
To find potential duplicates

1 Obtain information about the object whose potential duplicates you want to view, such as a system in which they are registered or the logon ID of the user who created the object profile.

2 On the EDM, select **Matching Review**. The Matching Review Search page appears.

Figure 42   Matching Review Search Page

3   On the Matching Review Search page, enter your search criteria (for more information, see **"About Matching Review Search Fields"** following this procedure).

4   In the upper portion of the page, click **Search for Potential Duplicate**. The Potential Duplicate Result page appears (for more information, see **"About Potential Duplicate Results Fields"** following this procedure).

Figure 43   Potential Duplicate Search Results List

5   To re-sort the object profiles in the results list, click the heading of the column by which you want to sort.

Note: *Clicking a header once sorts the profiles in ascending order; clicking the heading a second time sorts the profiles in descending order.*

6   In the Results list, click the ID of the pair of potential duplicate profiles you want to compare.

7   Do one of the following:

　　◆ If the profiles you selected have additional potential duplicates, then the Associated Records page appears. Continue to step 8.

Figure 44 Associated Records List

- ◆ If the profiles do not have additional duplicates, the Comparison page appears with the two profiles displayed side-by-side (see Figure 41). Skip to step 9.

8 On the Associated Records page, click the ID of the pair of profiles you want to compare. The Comparison page appears (see Figure 41).

The selected profiles appear side-by-side.

9 To compare child object information in the SBR:

- ▪ Under **SBR** in both the right and left EUID trees, expand the folder containing the type of child object you want to view.

- ▪ Select a specific child object to view from each EUID tree.

10 To compare child object information in system records:

- ▪ Under **Source Systems** in both the right and left EUID trees, expand the folder containing the source system you want to view, and then expand the folder containing the type of child object you want to view.

- ▪ Select a specific child object to view from each EUID tree.

11 To view the following entry in the potential duplicate results list, click **Next>**.

12 To view the previous entry in the potential duplicate results list, click **<Previous**.

13 To return to the potential duplicates results list, click **Result**.

About Matching Review Search Fields

The fields located on the Matching Review Search page allow you to specify information about the potential duplicate or assumed match profiles you want to view. The "Lookup By Local ID Section" is configurable, and the name may be different in your implementation.

Table 12   Matching Review Search Fields

In this field …	type or select …
EUID	The enterprise-wide unique identification number of one of the profiles you want to view.
Status	The potential duplicate status of the profiles you want to view. Possible values for this field are **Unresolved**, **Resolved**, or **Permanently Resolved**.
System	The system with which the object profile that caused the potential duplicate flag is associated (such as a registration system).
Local ID	The local ID associated with the object profile in the specified system. The name of this field may be different for your implementation.
Create Date From	A beginning create date for the profiles you want to view. The query is performed for transactions that fall between the **Create Date From** (and **Create Time From**) and the **To Create Date** (and **To Create Time**).
Create Time From	The beginning create time for the profiles you want to view.
To Create Date	The ending create date for the profiles you want to view.
To Create Time	The ending create time for the profiles you want to view.

About Potential Duplicate Results Fields

The fields located in the potential duplicate results list help you to identify a potential duplicate pair to display on the Comparison page.

Table 13   Potential Duplicate Results Fields

This field …	displays this information …
ID	The Potential Duplicate ID of the transaction that caused the potential duplicate pair.
EUID1	The enterprise unique identification number of the object profile whose addition to the database created the potential duplicate listing.
EUID2	The enterprise unique identification number of the object that was flagged as a potential duplicate with the profile identified by the EUID1.
Status	The potential duplicate status of the potential duplicate pair.
Reason	The reason that the profiles were listed as potential duplicates.

Table 13 Potential Duplicate Results Fields

This field …	displays this information …
Weight	The matching probability weight between the two profiles in each row.
System	The system with which the object profile identified by EUID1 is associated.
Create Date	The date and time that the transaction that caused the potential duplicate listing occurred.

Merging Potential Duplicates

When you compare two potential duplicate profiles, you might find that the object profiles represent the same entity, or that a system record from one profile actually belongs in the other profile. You can perform either an object profile merge or a system record merge to correct this.

To combine object profiles

1   Compare two potential duplicate profiles, as described in **"Finding Potential Duplicates" on page 82**.

2   Determine which of the two profiles you want to keep, and then click the **EUID Merge** arrows pointing toward that profile.

The merge result profile appears, allowing you to view the profile that will be saved after the merge.

3   Click **Confirm** to finalize the merge, or **Cancel** to return to the Comparison page and review the profiles again.

To combine system records

1   Compare the system records from two potential duplicate profiles, as described in **"Finding Potential Duplicates" on page 82**.

2   Determine which of the two system records you want to keep.

3   Highlight both system records to be merged, and then click the **LID Merge** arrows pointing toward the system record you want to keep.

4   To retain any fields from the non-surviving system record, select the check box next to the fields you want to keep.

5   To specify which child objects to retain:

  ◆ Compare the child objects to determine which to retain and which to remove.

  ◆ For each child object you do not want to save in the new system record, click **Remove <child_type>** beneath that child object (where *<child_type>* is the type of child object to remove).

Important: *If you do not specify which child objects to retain, the survivor calculator determines which to save in the surviving system record. By default, all unique child objects are retained, but any child objects with the same unique key value are retained according to survivor strategies. For example, if one system record has an office*

address and the other has a home address, both addresses are kept; but if both system records have a home address, the survivor calculator determines which is kept.

6   In the upper portion of the page, click **Merge**.

The merge result record appears, allowing you to view the information that will be saved in the SBR after the merge.

7   Click **Confirm** to finalize the merge, or **Cancel** to return to the Comparison page and review the profiles again.

Resolving Potential Duplicates

When you compare two potential duplicate profiles and determine that they do not represent the same object, you need to resolve the two profiles to flag the profiles as not being potential duplicates. There are two types of resolution. *Resolve* removes a potential duplicate flag, but if one of the resolved profiles is updated the records may be listed as potential duplicates again. *Resolve Permanently* flags the two profiles as being permanently resolved.

To resolve two potential duplicate profiles

1   Compare two potential duplicate profiles, as described in **"Finding Potential Duplicates" on page 82**.

2   Do one of the following:

   ◆ To flag the potential duplicate profiles as resolved but still allow the potential duplicate listing to be reinstated in the future, click **Resolved** on the Comparison page.

   ◆ To flag the potential duplicate profiles as resolved and never allow the potential duplicate listing to be reinstated, click **Resolve Permanently** on the Comparison page.

3   On the confirmation dialog that appears, click **OK**.

The potential duplicate flag is removed, and the profiles are no longer regarded as possible duplicates of one another.

5.3.7 Working with Assumed Matches

The Matching Review function of the EDM allows you to view any object profiles that were automatically updated by the master index as a result of an assumed match. You can reverse the assumed match if necessary. This section provides instructions for finding profiles updated by an assumed match and then reversing the update if necessary.

Finding Assumed Matches

You can easily find object profiles that were updated by an assumed match using the Matching Review function of the EDM. When you search for assumed matches, you can select an object profile to view from a results list.

Figure 45 Assumed Match Page
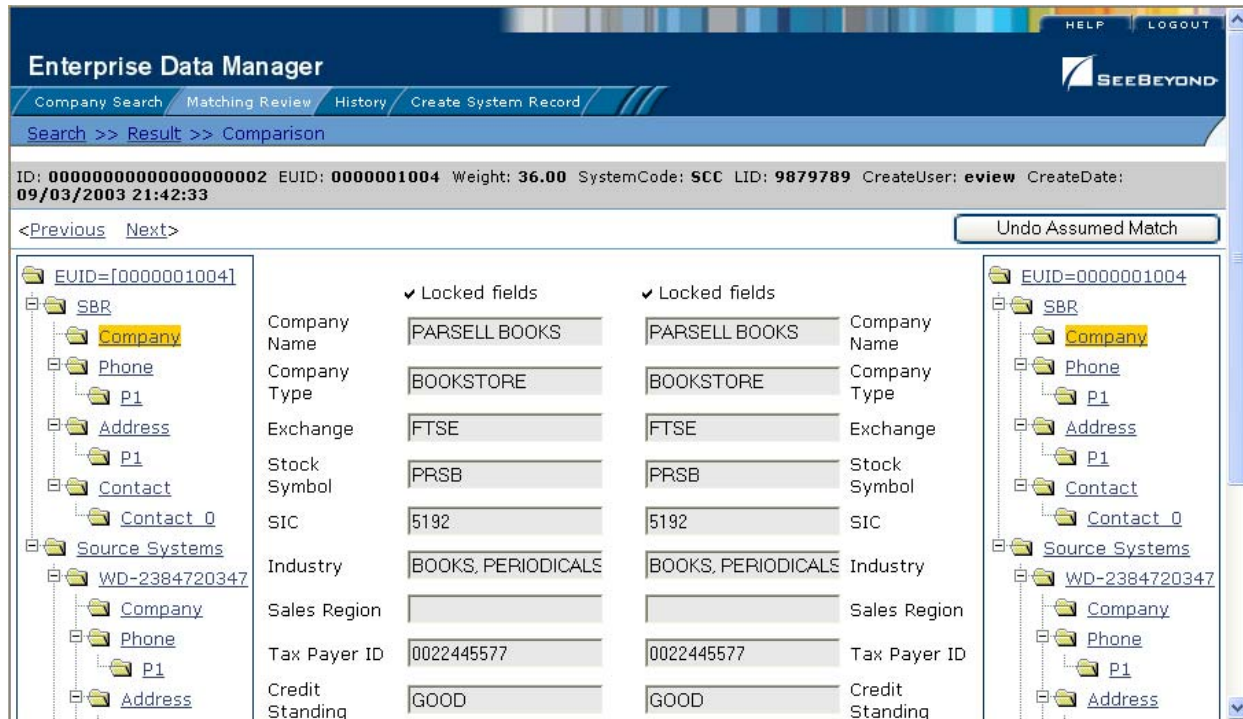
To find assumed matches

1 Obtain information about the object profile you want to view, such as their EUID, a system in which they are registered, or the logon ID of the user who added the record that caused the update.

2 On the EDM, select **Matching Review**. The Matching Review Search page appears.

Figure 46 Matching Review Search Page

3   On the Matching Review Search page, enter the search criteria (for more information, see **"About Matching Review Search Fields" on page 86**).

4   In the upper portion of the page, click **Search for Assumed Match**. The Assumed Match Result page appears (for more information, see **"About Assumed Match Results Fields"** following this procedure).

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Figure 47 Assumed Match Results List

5 To re-sort the object profiles in the results list, click the heading of the column by which you want to sort.

Note: *Clicking a header once sorts the profiles in ascending order; clicking the heading a second time sorts the profiles in descending order.*

6 In the Results list, click the ID of the assumed match profile you want to view.

The Assumed Match page appears with the parent object of the SBR displayed.

7 To view additional information about the object, review the instructions provided under **"Viewing Object Profiles" on page 43**.

8 To view the following entry in the assumed match results list, click **Next>**.

9 To view the previous entry in the assumed match results list, click **<Previous**.

10 To return to the assumed match results list, click **Result**.

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About Assumed Match Results Fields

The fields located in the assumed match results list help you to identify an assumed match transaction to display on the Comparison page.

Table 14   Assumed Match Results Fields

This field …	displays this information …
ID	The Assumed Match ID of the transaction that caused the assumed match.
EUID	The enterprise unique identification number of the object profile that was updated by the assumed match.
Weight	The matching probability weight between the updated profile and the record that caused the assumed match.
System	The system with which the record that cause the assumed match is associated.
Local ID	The local ID in the above system for the record that caused the assumed match. The name of this field may be different for your implementation.
Create User	The logon ID of the user who added the profile that created the assumed match.
Create Date	The date and time that the transaction that caused the assumed match occurred.

Reversing an Assumed Match

If you find that an assumed match was made in error, you can reverse the assumed match. This process returns the updated object profile to its status just prior to the assumed match update, and creates a new object profile for the record that caused the assumed match.

To reverse an assumed match

1   View the assumed match profile, as described in **"Finding Assumed Matches" on page 88**.

2   In the upper portion of the page, click **Undo Assumed Match**.

A confirmation dialog appears, providing the EUID number of the new profile that will be created as a result of reversing the match.

3   On the confirmation dialog, click **OK**.

The assumed match is undone, the updated profile is returned to its state prior to the assumed match, and a new object profile is created.

5.3.8 Combining Object Information

When you determine that two object profiles represent the same object, you need to merge the profiles to form one profile that contains the object's most current information. The resulting profile is known as the Merge Result Record. You can display the object profiles to merge using the Search function or the Matching Review

function. This section describes how to merge records using the Search function. For information about merging records using the Matching Review function, see **"Merging Potential Duplicates" on page 87**.

Merging Object Profiles

When you merge object profiles, all of the system records associated with the non-surviving object profile are transferred into the surviving object profile. The non-surviving profile is given a status of merged, and is no longer active. The SBR of the surviving profile is recalculated based on the new system records that were added to the profile due to the merge.

Figure 48 Comparison Page - Merging Object Profiles
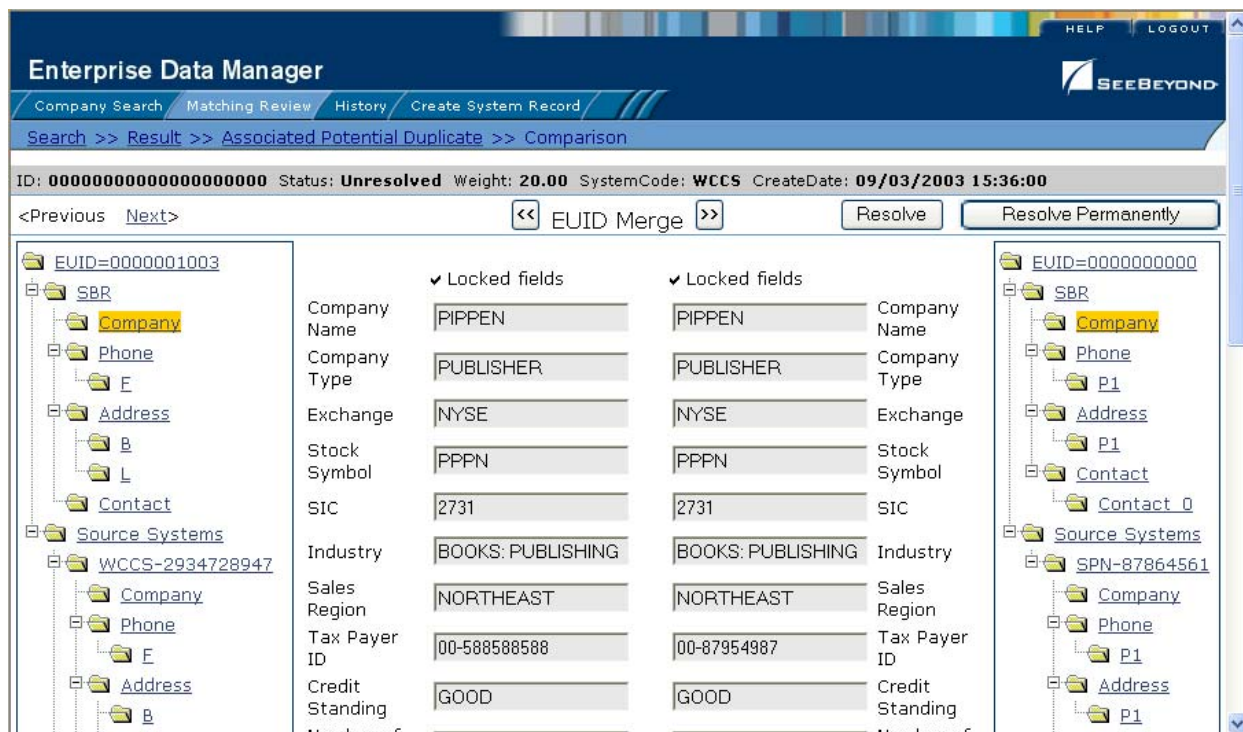
To merge object profiles

1 Perform a search for the object profiles you want to merge using any of the search procedures described in the section **"Searching for Object Profiles" on page 29**.

2 Select the check boxes to the left of the two profiles you want to merge in the results list.

3 In the first cell of the results table, click **Compare Records**.

The Comparison page appears.

4 Determine which of the two profiles you want to keep, and then click the **EUID Merge** arrows pointing toward that profile.

The merge result profile appears, allowing you to view the profile that will be saved after the merge.

5 Click **Confirm** to finalize the merge, or **Cancel** to return to the Comparison page and review the profiles again.

Merging System Records

You can merge a system record from one object profile into a system record from another object profile or two system records from one profile, as long as both system records originated from the same system. You can also specify which, if any, information to save from the non-surviving system record. When you merge system records, the non-surviving system record is transferred into the object profile of the surviving system record, and is given a status of merged.

Figure 49   Merging System Records
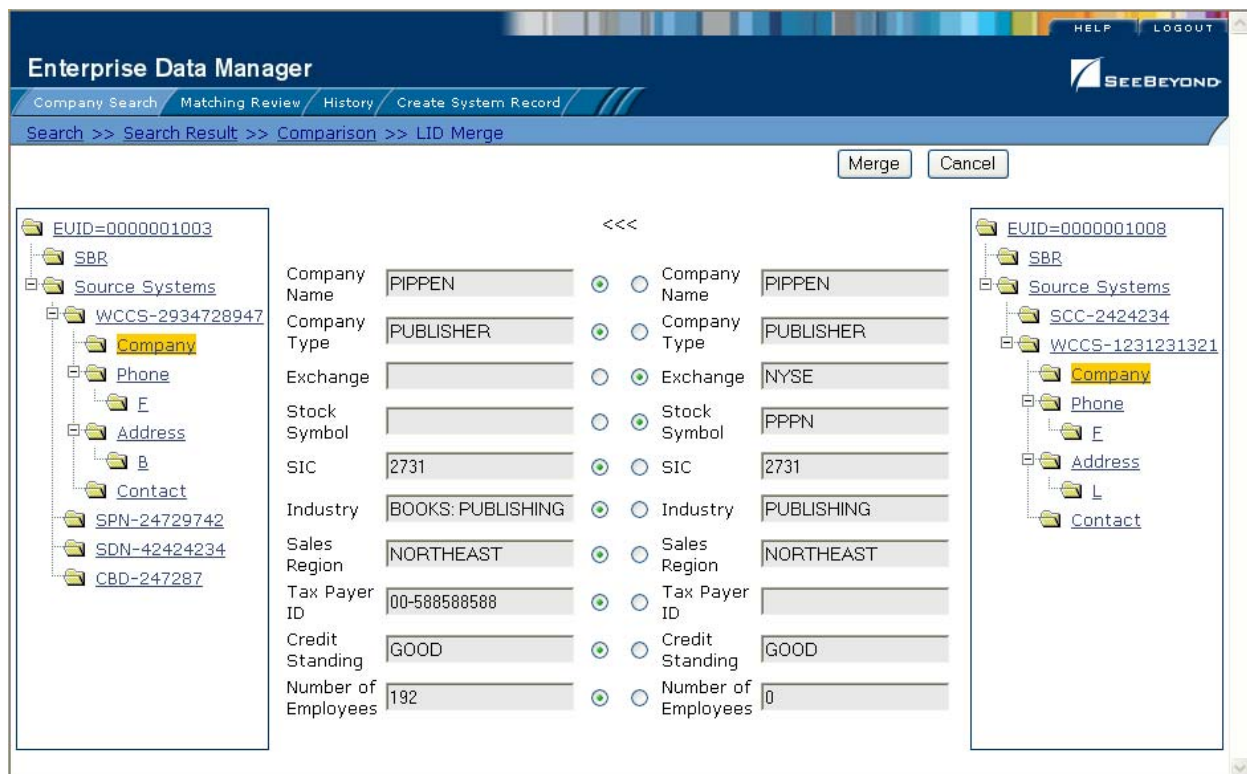
To merge system records

1 Perform a search for the object profiles whose system records you want to merge using any of the search procedures described in the section **"Searching for Object Profiles" on page 29**.

2 Select the check boxes to the left of the two profiles containing the system records you want to merge.

3 In the first cell of the results table, click **Compare Records**.

The Comparison page appears.

4   Determine which system record you want to keep, and highlight the parent object of the those system records in the EUID trees.

Two LID Merge arrow buttons appear at the top of the page.

5   Click the **LID Merge** arrows pointing toward the profile containing the system record that will be kept.

6   To retain any fields from the non-surviving system record, select the parent objects in the system objects to merge, and then select the check box next to the fields you want to keep.

7   To specify which child objects to retain:

   ◆ Compare the child objects to determine which to retain and which to remove.

   ◆ For each child object you do not want to save in the new system record, click **Remove <*child_type*>** beneath that child object (where <*child_type*> is the type of child object to remove).

Important: *If you do not specify which child objects to retain, the survivor calculator determines which to save in the surviving system record. By default, all unique child objects are retained, but any child objects with the same unique key value are retained according to survivor strategies. For example, if one system record has an office address and the other has a home address, both addresses are kept; but if both system records have a home address, the survivor calculator determines which is kept.*

8   In the upper portion of the page, click **Merge**.

The merge result record appears, allowing you to view the information that will be saved in the SBR after the merge.

9   Click **Confirm** to finalize the merge, or **Cancel** to return to the Comparison page and review the profiles again.

After you merge two system records, the surviving system record is updated, and the non-surviving system record is transferred to the "merge to" object profile and is marked as merged. The SBRs for both object profiles involved in the merge are recalculated. If the "merge from" object profile no longer has any system records, it is deactivated.

5.3.9 Unmerging Object Information

If two object profiles or system records are merged in error, you can unmerge the profiles or system records. The unmerge function is accessed from the Transaction History window.

Figure 50   Unmerge Page
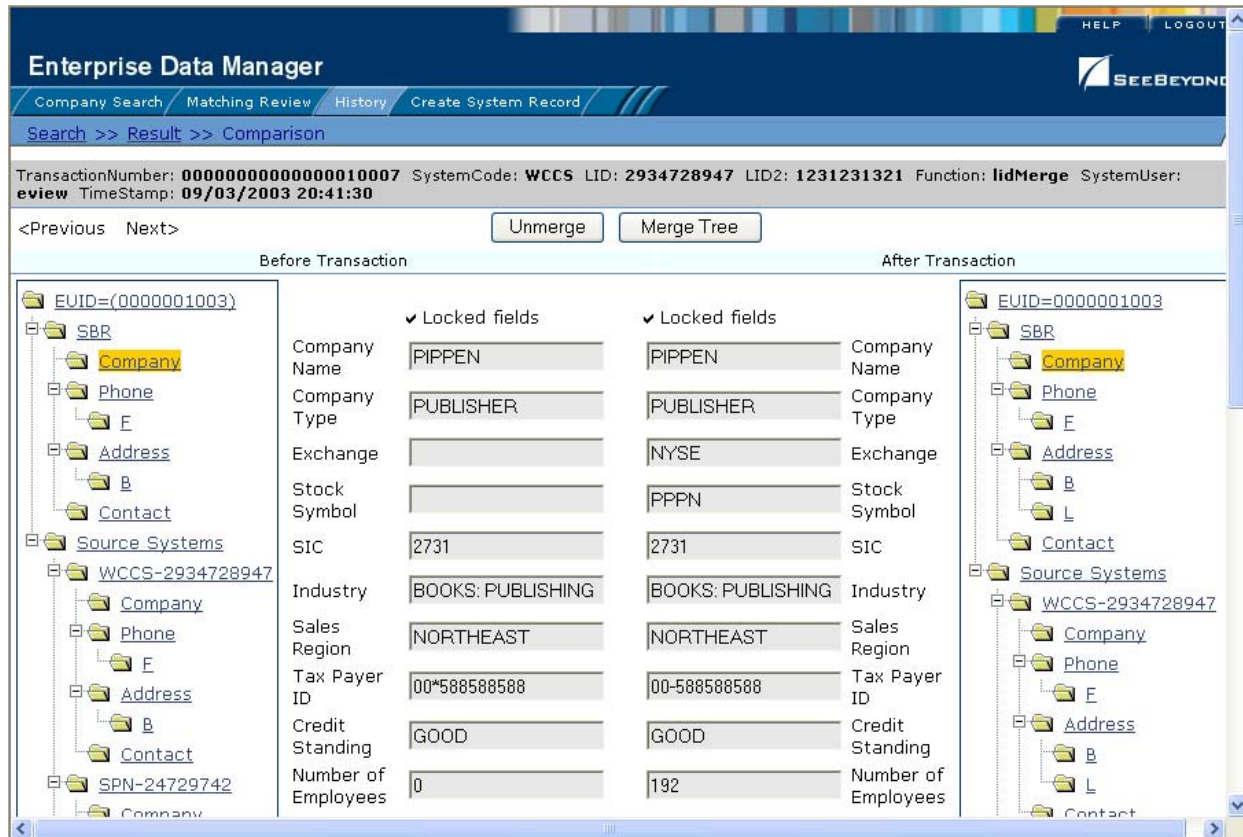
Unmerging Object Profiles

If two object profiles are merged in error, the profiles can easily be separated by unmerging the two profiles. When you unmerge two object profiles, the information is returned to the original profiles, the system records are returned to their original profiles, and any changes that were made after the merge are retained. Any system records that were added while the profiles were merged are associated with the profile that was active at the time.

To unmerge two merged object profiles

1   Obtain information about the object profile that is still active after the merge process, such as the EUID, the system that caused the merge, and so on.

2   Perform a search for the merge transaction, as described in **"Viewing a Transaction History" on page 45**.

Note: *You can also access the Transaction History Search Result page by displaying the active profile on the View/Edit page, and then clicking **Transaction History**.*

3   From the Results list, select the merge transaction you want to unmerge. This must be the most recent merge transaction for the profile, and must have a function of **EUID Merge**.

The Transaction History page appears.

Note: *The profiles that appear on the Transaction History page display the information contained in surviving object profile before and after the merge occurred. Select the option button next to the second EUID in the upper portion of the window to view a before image of the non-surviving profile.*

4   In the upper portion of the page, click **Unmerge**.

The page changes to display side-by-side images of how the records will appear after they are unmerged.

5   Do one of the following:

   ◆ To finalize the unmerge, click **Confirm** in the upper portion of the page.

   ◆ To cancel the unmerge and return to the Transaction Comparison page, click **Cancel** in the upper portion of the page.

Unmerging System Records

If two system records are merged in error, the records can easily be separated by unmerging the two system records. When system records are unmerged, the system record that became inactive is reactivated and, if the system record was merged from a different object profile, it is returned to its original profile. The SBR is recalculated for all affected object profiles. Any changes made to the surviving system record following the merge are retained after the unmerge transaction.

To unmerge two merged system records

1   Obtain information about either object profile involved in the merge, such as the EUID, the system that caused the merge, and so on.

2   Perform a search for the merge transaction, as described in **"Viewing a Transaction History" on page 45**.

Note: *You can also access the Transaction History Search Result page by displaying the active profile on the View/Edit page, and then clicking **Transaction History**.*

3   From the Results list, select the merge transaction you want to unmerge. This must be the most recent merge transaction for the system record, and has a function of **lidMerge**.

The Transaction History page appears.

Note: *The profiles that appear on the Transaction History page display the information contained in the object profile into which the system record was merged both before and after the merge occurred.*

4   In the upper portion of the page, click **Unmerge**.

The page changes to display side-by-side images of how the records will appear after they are unmerged.

5   Do one of the following:

◆ To finalize the unmerge, click **Confirm** in the upper portion of the page.

◆ To cancel the unmerge and return to the Transaction Comparison page, click **Cancel** in the upper portion of the page.

Glossary

alphanumeric search
A type of search that looks for records that precisely match the specified criteria. This type of search does not allow for misspellings or data entry errors, but does allow the use of wildcard characters.

assumed match
When the matching weight between two records is at or above a weight you specify, (depending on the configuration of matching parameters) the objects are an assumed match and are merged automatically (see "Automatic Merge").

automatic merge
When two records are assumed to be matches of one another (see "Assumed Match"), the system performs an automatic merge to join the records rather than flagging them as potential duplicates.

Blocking Query
The query used during matching to search the database for possible matches to a new or updated record. This query makes multiple passes against the database using different combinations of criteria. The criteria is defined in the Candidate Select file.

Candidate Select file
The eView configuration file that defines the queries you can perform from the Enterprise Data Manager (EDM) and the queries that are performed for matching.

candidate selection
The process of performing the blocking query for match processing. See *Blocking Query*.

candidate selection pool
The group of possible matching records that are returned by the blocking query. These records are weighed against the new or updated record to determine the probability of a match.

deactivate
When you deactivate an object profile or system record, that profile or record is no longer active and cannot be modified or merged.

drop-down lists
A list of options that you can use to enter information into certain fields in the Enterprise Data Manger (EDM). These fields have a down-arrow button on the right side that, when clicked, display a drop-down list of options for that field.

duplicate threshold
The matching probability weight at or above which two records are considered to potentially represent the same entity.

EDM
See *Enterprise Data Manager*.

Enterprise Data Manager
Also known as the EDM, this is the web-based interface that allows monitoring and manual control of the master index database. The configuration of the EDM is stored in the Enterprise Data Manager file in the eView Project.

enterprise object
See *object profile*.

EUID
The enterprise-wide unique identification number assigned to each object profile in the master index. This number is used to cross-reference objects and to uniquely identify each object throughout your organization.

local ID
A unique identification code assigned to an object in a specific local system. An object profile may have several local IDs in different systems. The name of the local ID field is configurable on the EDM, and might have been modified for your implementation.

main menu
The uppermost menu on the EDM pages. You can access all of the primary functions of the master index from this menu.

master index
A database application that stores and cross-references information on specific objects in a business organization, regardless of the computer system from which the information originates.

matching probability weight
An indicator of how closely two records match one another. The weight is generated using matching algorithm logic, and is used to determine whether two records represent the same object.

matching threshold
The lowest matching probability weight at which two records can be considered a match of one another.

matching weight *or* match weight
See *matching probability weight*.

merge
To join two object profiles or system records that represent the same entity into one object profile.

merge history
A tree structure that displays a history of the profiles that have been merged together to form the selected object profile.

non-surviving profile
An object profile that is no longer active because it has been merged into another object profile. Also called a *merged profile*.

object
A component of an object profile, such as a company object, which contains all of the demographic data about a company, or an address object, which contains information about a specific address type for the company.

object profile
A set of information that describes characteristics of one enterprise object. A profile includes identification and other information about an object and contains a single best record and one or more system records.

page
The portion of the browser window that displays the information for a specific function. For example, the Search page displays search criteria fields and is accessed by clicking the Search function.

phonetic search
A search that returns phonetic variations of the entered search criteria, allowing room for misspellings and typographic errors.

potential duplicates
Two different object profiles that have a high probability of representing the same object. The probability is determined using matching algorithm logic.

probabilistic weighting
A process during which two records are compared for similarities and differences, and a matching probability weight is assigned based on the fields in the match string. The higher the weight, the higher the likelihood that two records match.

probability weight
See *matching probability weight*.

SBR
See *single best record*.

single best record
Also known as the SBR, this is the best representation of an entity's information. The SBR is populated with information from all source systems based on the survivor strategies defined for each field. It is a part of an object profile and is recalculated each time a system record is updated.

survivor calculator
   The logic that determines which fields from which source systems should be used to populate the SBR.

survivorship
   Refers to the logic that determines which fields are used to populate the SBR. The survivor calculator defines survivorship.

system
   A computer application within your company where information is entered about the objects in the master index and that shares this information with the master index (such as a registration system). Also known as "source system" or "external system".

system record
   A component of an object profile that contains the object's information as it appears in an external system. The information in an object's SBR is a combination of data from each system record in that profile.

tab
   A heading on an application window that, when clicked, displays a different type of information. For example, click the Create System Record tab to display the Create System Record page.

Threshold file
   An eView configuration file that specifies duplicate and match thresholds, EUID generator parameters, and which blocking query defined in the Candidate Select file to use for matching.

transaction history
   A stored history of an object's profile. This history displays changes made to an object's information as well as merges, unmerges, and so on.

unmerge
   To unmerge two previously merged object profiles or system records. When you perform an unmerge, each profile or system record is returned to its status prior to the merge.

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