*e*Index Global Identifier Product Suite*

Working with Reports for e*Index Global Identifier

Version 4.5.2

SEEBEYOND

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Chapter 1

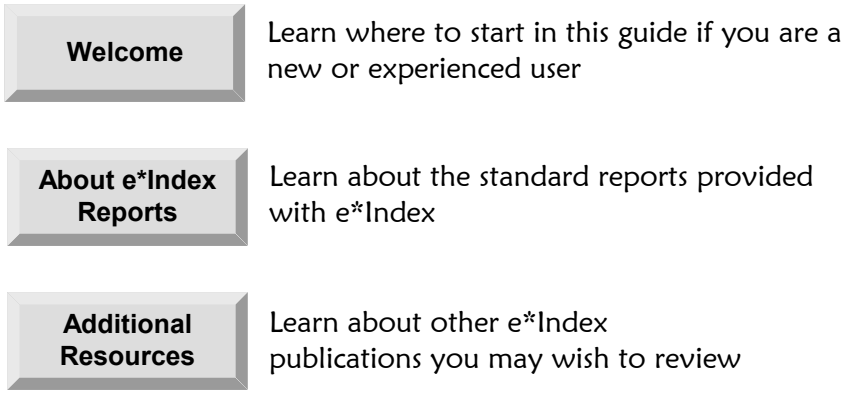
Introduction

About this Chapter

Overview

This introduction provides an overview of the standard reports provided with e*Index Global Identifier.

The following diagram illustrates the contents of each major topic in this chapter. For the page numbers on which specific topics appear, see "What's Inside" on the following page.



What's Inside

This chapter provides background information and instructions related to the topics listed below.

Introduction 1-3
About e*Index Reports 1-6
Additional Resources 1-8

Introduction

Welcome

Welcome to e*Index, SeeBeyond's enterprise-wide master person index. This document describes the reports provided with e*Index, how to run the reports, and how to analyze the information provided in these reports. This chapter of the document provides background information about the standard e*Index reports.

Whether you are a new or established user, you should read through this guide before you run any e*Index reports. Please pay particular attention to the overview sections provided at the beginning of each chapter and at the beginning of each section within a chapter. The overview sections are designed to provide background and explanatory information you may need to understand. After reading the overview information, you will be ready to perform specific tasks using the step-by-step instructions provided in each chapter.

What is the Scope of this Guide?

This guide provides background information about the data included in each e*Index report, and step-by-step instructions for running each report. It also includes appendixes with samples of each standard report.

This guide does not include information or instructions on using any of the e*Index applications or working with e*Index e*Ways. These topics are covered in the appropriate user guide (for more information, see "Additional Resources" on page 1-8).

Who Should Use this Guide?

Any user who will be running and analyzing e*Index reports should read this guide. A thorough knowledge of e*Index is not needed to understand this guide, but it is presumed that the reader of this guide is familiar with the GUI and functionality of e*Index, as well as the information stored in the e*Index database. Readers who will modify the e*Index reports must have a working knowledge of PL/SQL and Oracle database administration. It is also helpful to be familiar with specific data maintenance issues that need to be addressed within your organization.

How Should this Guide be Used?

For best results, you should skim through the guide to familiarize yourself with the locations of essential procedures you need to perform. Each chapter begins with a simple graphic that identifies the information contained in the chapter. The second page of each chapter contains a list of topics and instructions included in the chapter and the associated page numbers.

How is this Guide Organized?

This guide is divided into three chapters and two appendixes that cover the topics shown below.

Chapter	Topics
Chapter 1, Introduction	■ Introduction ■ About e*Index Reports ■ Additional Resources
Chapter 2, Working with GUI Reports	■ Working with GUI Reports ■ Running GUI Reports
Chapter 3, Working with Production Reports	■ Learning About Production Reports ■ Running Production Reports
Appendix A: GUI Report Samples	
Appendix B: Production Report Samples	

What Conventions are Used in this Guide?

Before you start using this guide, it is important to understand the icon and special notation conventions used.

Icon and Special Notation Conventions

The following conventions are used in this and other e*Index publications to identify special types of information.

Icon or Notation	Type of information
Note	Supplemental information that is helpful to know, but not essential to completing a particular task.
Tip	Information that helps you to apply techniques and procedures described in the text to your specific needs. May also suggest alternative methods.
Important!	Information that is essential to the completion of a task.
Caution!	Advises you to take specific action to avoid loss of data.
	Indicates the beginning of a step-by-step instruction.
	Specifies a task to perform before you begin a step-by-step instruction.
	Indicates a cross-reference to other sections of the guide or to other publications.

About e*Index Reports

Overview

e*Index provides reporting capabilities through both the GUI and through database scripts written in PL/SQL (known as production reports). From the GUI, you can print images of the member profiles displayed on the window. The production reports provide additional information about the current state of the data in the e*Index database, and can be scheduled and automatically delivered through a variety of means. For additional reporting needs, the database is accessible using any commercially available ODBC-compliant reporting tool.

About GUI Reports

The e*Index GUI provides the ability to print reports for the member profiles currently displayed on the e*Index window. From the GUI, you can print information about member profiles including audit trail reports, potential duplicate reports, person detail reports, search results reports, and comparison reports. These reports only display information about the member profiles that are currently displayed on the active e*Index window.

About Production Reports

Production reports are run daily, weekly, monthly, and yearly, and provide information about the daily transactions that are processed through the e*Index database. These reports provide lists of potential duplicate records (for both same and different systems), records with duplicate social security numbers, updates, merges, unmerges, deactivated records, and so on. The information you find in these reports helps you to continue to analyze your matching threshold configuration, and provides invaluable information about how data is being processed in your current configuration. Production reports can be automatically scheduled in Unix using a cron job that SeeBeyond can create for you. You should also run production reports against any data that has been converted from existing systems into the e*Index database using the initial load program.

Modifying Reports

This document describes specific changes that you may need to make to the standard report scripts before you run them against the e*Index database. Most of these changes should only need to be made one time, before you first run the reports. The standard reports are written in the PL/ SQL scripting language. If you have a working knowledge of PL/ SQL and the e*Index

database structure, you can further customize these reports as needed, however reports that are customized beyond the modifications described in this guide are not supported by SeeBeyond.

Creating Custom Reports

If the standard reports provided with e*Index don't provide you with all the information you would like to see, you can create custom reports. If you are experienced using PL/SQL, you can use the existing reports as a basis for any new reports you would like to create. You can also access the e*Index database using any ODBC-compliant report writer (such as Crystal Reports), providing you with the flexibility to report on any information contained in the e*Index database.

Additional Resources

SeeBeyond has developed a suite of e*Index user guides and related publications that are distributed in an electronic library.

- *e*Index Global Identifier User's Guide*
  Helps e*Index quality workstation users to perform database maintenance tasks, such as merging and unmerging records, finding and resolving potential duplicates, adding and updating records, and viewing the audit trail.
- *e*Index Administrator User's Guide*
  Helps system administrators configure the system parameters for e*Index to meet your business requirements. This guide also describes how to maintain the information in the database that is used to populate the drop-down lists in the e*Index.
- *e*Index Security User's Guide*
  Helps system administrators add users and user groups to e*Index applications, to grant security permissions to users and user groups, to maintain user and user group information, and to configure certain system parameters.
- *e*Index Global Identifier Technical Reference*
  Describes message processing for e*Index, as well as database tables and e*Index Monk APIs. This guide also provides a complete listing of e*Index Monk APIs and functions, along with a description, parameters, syntax, return values, and examples for each.
- *e*Index Initial Load User's Guide*
  Provides the background information and instructions that system and database administrators need in order to load legacy data into the e*Index database, including a description of the expected data format and the schema files included with the load program.
- *e*Index Global Identifier Installation Guide*
  Helps system and database administrators install a new e*Index environment for the current release, including e*Index schema files, the e*Index GUI, and database installation.
- *e*Index Global Identifier Upgrade Guide*
  Helps system and database administrators upgrade an existing e*Index environment to the most current release, including e*Index schema files, the e*Index GUI, and database upgrades.
- *e*Index 4.1.1 to 4.5.1 Upgrade Guide*
  Helps system and database administrators upgrade an existing e*Index 4.1.1environment to version 4.5.2, including e*Index schema files, the e*Index GUI, database, and report upgrades.

Chapter 2

Working with GUI Reports

About this Chapter

Overview

This chapter presents the background information and the step-by-step instructions you need to print reports from the e*Index GUI.

The following diagram illustrates the contents of each major topic in this chapter. For the page numbers on which specific topics appear, see the next page of this chapter.

What's Inside

This chapter provides background information and instructions related to the topics listed below.

Learning about GUI reports 2-3
Running GUI reports 2-5
- To run a Person Search Results Report 2-5
- To run a Person Detail Report 2-6
- To run a Person Compare Report 2-6
- To run an Audit Trail Report 2-7
- To run a Potential Duplicate Report 2-7
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Learning About GUI Reports

Overview

This section of the chapter provides background information about reports you can print from the e*Index GUI. You can print reports from the GUI with a simple mouse-click on the **Print Report** tool.

Available GUI Reports

The reports that you can print from the GUI generally print information about one or two member profiles that are displayed on the current active window. Printing reports from any of the comparison windows allows you to view the entire comparison in one view. The reports that are available from the GUI include:

- **Person Search Result Report**
  This report displays a list of all of the profiles returned from a search. You can print this report from the Search Results window of the Search and View Persons function. For a sample of this report, see page A-3 of "Appendix A: GUI Report Samples".
- **Person Detail Report**
  This report lists all of the demographic and identifying information for the displayed member profile. You can print this report from the View/Edit Person window. For a sample of this report, see page A-4 of "Appendix A: GUI Report Samples".
- **Person Compare Report**
  This report displays all of the demographic and identifying information for both profiles displayed on a comparison window. You can print this report from the Potential Duplicate Compare window or the Comparison window. For a sample of this report, see page A-6 of "Appendix A: GUI Report Samples".
- **Audit Trail Report**
  This report prints an image of the member profile that appears on the Audit Trail window. The Audit Trail report provides an image of the profile before and after changes were made to the profile. You can only print this report from the Audit Trail window. For a sample of this report, see page A-10 of "Appendix A: GUI Report Samples".
- **Potential Duplicate Report**
  This report prints a list of member profiles that are returned for a potential duplicate search. You can only print this report from the Result page of the Potential Duplicate Search window. For a sample of this report, see page A-15 of "Appendix A: GUI Report Samples".

- **Potential Duplicate Associated Records Report**
  This report prints a list of member profiles that appear on the Associated Records dialog when you select a profile from the results list on the Potential Duplicate Search window. This report is very useful to review member profiles that are linked by duplicate flags, and to determine the order in which they should be resolved or merged. You can only print this report from the Associated Record dialog. For a sample of this report, see page A-16 of "Appendix A: GUI Report Samples".

- **Miscellaneous**
  You can print an image of any window in e*Index by clicking the **Print Active Screen** button. This prints the current active e*Index window, but only prints the visible member information.

Printer Setup

Unless you specify otherwise, the reports automatically print to the printer that you have designated as the default printer on the Quality Workstation. You can modify the default printer by clicking **Start** on your Windows desktop, pointing to **Settings**, and then clicking **Printers**. Right-click the printer name that you want to be your default printer, and select **Set as Default Printer**.

You can also change the printer through the **File | Printer Setup** option on the e*Index Main Menu. This will only change the printer settings for the current session.

Running GUI Reports

Overview

You can perform any of the following reporting activities from the e*Index GUI:

- Running a Person Search Result Report
- Running a Person Detail Report
- Running a Person Compare Report
- Running an Audit Trail Report
- Running a Potential Duplicate Report
- Running a Potential Duplicate Associated Records Report

Note: *See "Appendix A: GUI Report Samples" for examples of each of these reports.*

Running a Person Search Results Report

The Search Result Report displays a list of all of the profiles returned from a search performed on the Search and View Persons window. You can use this report to maintain a listing of all records that closely match your specified criteria. For a sample of this report, see page A-3 of "Appendix A: GUI Report Samples".

▶ To run a Search Results Report

Before you begin:

- ✓ Make sure you are printing to the correct printer (see "Printer Setup" earlier in this chapter)
- ✓ If necessary, review information about performing searches in Chapter 3 of the *e*Index Global Identifier User's Guide*

1 From the Search window, perform a search for the member profile you want to display.

Print Report tool

2 When the Search Results page appears, click **Print Report**. The report prints to the specified printer.

Running a Person Detail Report

The Person Detail Report displays all of the demographic and identifying information for the member profile displayed on the View/Edit Person window. For a sample of this report, see page A-4 of "Appendix A: GUI Report Samples".

▶ To run a Detail Report

Before you begin:

- ✓ Make sure you are printing to the correct printer (see "Printer Setup" earlier in this chapter)
- ✓ If necessary, review information about viewing member profiles in Chapter 3 of the *e*Index Global Identifier User's Guide*

1 Perform a search for the member profile you want to display, and select the appropriate profile from the results list. The View/Edit Person window appears.

Print Report tool

2 On the View/Edit Person toolbar, click **Print Report**. The report prints to the specified printer.

Running a Person Compare Report

The Person Compare Report displays all of the demographic and identifying information for both profiles displayed on a comparison window, one after the other. You can print member comparisons from the Potential Duplicate Compare and Comparison windows. For a sample of this report, see page A-6 of "Appendix A: GUI Report Samples".

▶ To run a Person Compare Report

Before you begin:

- ✓ Make sure you are printing to the correct printer (see "Printer Setup" earlier in this chapter)
- ✓ If necessary, review information about comparing member profiles in Chapter 4 of the *e*Index Global Identifier User's Guide*

1 Display the members you want to compare on one of the following windows:

- Comparison window
- Potential Duplicate Comparison window

Print Report tool

2 When the member profiles appear, click **Print Report** on the application window toolbar. The report prints to the specified printer.

Running an Audit Trail Report

The Audit Trail Report prints an image of the displayed member's profile before and after changes were made to the profile. You can only print this report from the Audit Trail window. For a sample of this report, see page A-10 of "Appendix A: GUI Report Samples".

▶ To run an Audit Trail Report

Before you begin:

- ✓ Make sure you are printing to the correct printer (see "Printer Setup" earlier in this chapter)
- ✓ If necessary, review information about viewing audit trails in Chapter 4 of the *e*Index Global Identifier User's Guide*

1 Display a member profile on the Audit Trail window (as described in "Viewing an Audit Trail" in Chapter 4 of the *e*Index Global Identifier User's Guide*).

Print Report

2 On the Audit Trail toolbar, click **Print Report**. The audit trail comparison is printed to the specified printer.

Running a Potential Duplicate Report

The Potential Duplicate Report prints a list of potential duplicate profiles returned from a potential duplicate search. You can only print this report from the Result page of the Potential Duplicate Search window. For a sample of this report, see page A-15 of "Appendix A: GUI Report Samples".

▶ To run a Potential Duplicate Report

Before you begin:

- ✓ Make sure you are printing to the correct printer (see "Printer Setup" earlier in this chapter)
- ✓ If necessary, review information about searching for potential duplicates in Chapter 4 of the *e*Index Global Identifier User's 's Guide*

1 Perform a search for potential duplicate profiles (as described in "Finding Potential Duplicates" in Chapter 4 of the *e*Index Global Identifier User's 's Guide*).

Print

2 On the Potential Duplicate Result page toolbar, click **Print**. The potential duplicate list is printed to the specified printer.

Running a Potential Duplicate Associated Record Report

The Potential Duplicate Associated Record report provides a list of all member profiles that are associated with the profile you selected from the Potential Duplicate result list. You can only print this report from the Associated Record dialog. For a sample of this report, see page A-16 of "Appendix A: GUI Report Samples".

▶ To run a Potential Duplicate Associated Record Report

Before you begin:

- ✓ Make sure you are printing to the correct printer (see "Printer Setup" earlier in this chapter)
- ✓ If necessary, review information about searching for potential duplicates in Chapter 4 of the *e*Index Global Identifier User's Guide*

1 Perform a search for potential duplicate profiles (as described in "Finding Potential Duplicates" in Chapter 4 of the *e*Index Global Identifier User's 's Guide*).

2 Select a member profile from the Potential Duplicate result list that is associated with multiple profiles.

3 In the Associated Record dialog, click the **Print** button. The potential duplicate list is printed to the specified printer.

Chapter 3

Working with Production Reports

About this Chapter

Overview

This chapter presents the background information and the step-by-step instructions you need to print the daily, weekly, monthly, and yearly reports provided with e*Index.

The following diagram illustrates the contents of each major topic in this chapter. For the page numbers on which specific topics appear, see the next page of this chapter.

About Production Reports — Learn about the reports that you can run on a daily, weekly, monthly, and yearly basis

Run Production Reports — Learn how to run the reports that provide information about the daily transactions against the e*Index database

Report Tools — Learn how to use standard SQL scripts to modify the data in the e*Index database

What's Inside

This chapter provides background information and instructions related to the topics listed below.

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Running production reports 3-7
- To run the Daily Update Report 3-7
- To run the Duplicate Social Security Report 3-9
- To run the Assumed Match Report 3-11
- To run the Daily Cross Entity Potential Duplicate Report 3-12
- To run the Daily Potential Duplicate Report 3-14
- To run the Daily Merge Report 3-16
- To run the Daily UnMerge Report 3-18
- To run the Weekly Transaction Audit Report 3-19
- To run the Monthly Management Summary Report 3-20
- To run the Yearly Management Summary Report 3-22

Learning About Production Reports

Overview

This section of the chapter provides background information about the standard production reports that are provided with e*Index. If you would like to report on additional information, you can create new reports using PL/SQL, or you can use any ODBC-compliant report writer.

Available Production Reports

The standard reports included with e*Index help you to monitor and analyze the data in the e*Index database. You can view information about the transactions processed (such as merges, updates, and inserts) and about any potential duplicates or assumed matches that result from these transactions. There are several daily reports, one weekly report, two monthly reports, and one yearly report. The production reports should be located on the e*Index database server in the database path in **/uireports/production**, although they may have been moved during installation.

Daily Reports

SeeBeyond provides several of the daily reports in two separate files, one for the current day and one for the previous day. The files that you need to use depend on whether you run the reports in the evening or morning. If you run the reports in the evening, you should run the current day's reports (these are designated by "_t.sql" at the end of the file name). If you run the reports in the morning, you should run the previous day's reports (designated by "_y.sql" at the end of the file name). You can customize the reports as needed.

The available daily reports include:

- **Daily Update Report**
  This report displays member profiles whose key information was updated on the day designated by the report. You can run this report for either the current or the previous day. The Daily Update Report includes the member's UID, local ID and system name, last and first name, middle name or initial, gender, date of birth, and address information. This report checks the transaction table for any transactions with an update function code of "UPD". In order to appear on this report, an updated profile must have an address type of **H** (home address) and must be associated with a local ID from the updating system.
  For samples of this report, see pages B-3 and B-4 in "Appendix B: Production Report Samples".

- **Duplicate Social Security Report**
  This report displays each member profile that has the same social security number (SSN) as another member profile, and you can use this report to reveal the over-use of default SSNs. You can run this report for profiles that were inserted or updated on either the current or the previous day. The information displayed on this report for each member includes the SSN, member last and first name, middle name or initial, date of birth, gender, UID, and all associated local ID and system pairs (up to four pairs). For samples of this report, see pages B-5 and B-6 in "Appendix B: Production Report Samples".

- **Assumed Match Report**
  This report displays information about any profiles that were automatically updated, and can be run for either the current or the previous day. The information in this report, in combination with data from the potential duplicate reports, helps you determine if your matching threshold for assumed matches is accurate. You should review this report daily.

  This report includes the following information about the updated profiles: UID, member name, date of birth, SSN, address information, and mother's and father's name. The report provides the same information for the incoming record that updated the existing record except the system and local appear instead of the UID. The report also displays the matching probability weight between the two records. For samples of this report, see pages B-7 and B-8 in "Appendix B: Production Report Samples".

- **Daily Cross Entity Potential Duplicate Report**
  This report displays information about member profiles that are potential duplicates of one another, and that are associated with different systems. The information provided on this report can help you determine whether the matching threshold and the duplicate threshold are accurate. This report only displays information about profiles with a status of **Active**.

  The information for each profile on this report includes the UID, local ID and system pair, member name, date of birth, gender, address, SSN, reason for the duplicate flag, and matching probability weight. You can run this report for potential duplicates created on either the current or the previous day. For samples of this report, see pages B-9 and B-10 in "Appendix B: Production Report Samples".

- **Daily Potential Duplicate Report**
  This report displays information about member profiles that are potential duplicates of one another, and that are associated with the same system. The information provided on this report can help you determine whether the matching threshold and the duplicate threshold are accurate. If two duplicate profiles on this report have a matching probability weight above the match threshold, it is an indication that the profiles most likely represent the same person. This report only displays information about profiles with a status of **Active**.

The information for each profile on this report includes the UID, local ID and system pair, member name, date of birth, gender, address, SSN, reason for the duplicate flag, and matching probability weight. You can run this report for potential duplicates created on either the current or the previous day. For samples of this report, see pages B-11 and B-12 in "Appendix B: Production Report Samples".

- **Daily Merge Report**
  This report displays a list of all records merged on either the current day or the previous day, depending on the report file you use. The information on this report includes the UID of the kept record and the UID of the merged record, and the member name, date of birth, gender, address, city, and SSN. This report sorts records by the login ID of the users who performed the merges. For samples of this report, see pages B-13 and B-14 in "Appendix B: Production Report Samples".

- **Daily UnMerge Report**
  This report displays a list of all records unmerged on either the current day or the previous day, depending on the report file you use. The information on this report includes the UIDs of the unmerged records, the member name, date of birth, gender, address, city, and SSN. This report is sorted by the login ID of the users who performed the unmerge transactions. For samples of this report, see pages B-15 and B-16 in "Appendix B: Production Report Samples".

- **Weekly Transaction Audit Report**
  This report displays a summary of transactions that occurred against the database on each day for the current week. The information provided in this summary includes the number of each of the following transactions performed each day.
  - ADD-B: Member profiles inserted from external systems
  - UPD-B: Member profiles updated from external systems
  - DEA-F: Member profiles deactivated from the e*Index GUI
  - ADD-F: Member profiles inserted from the e*Index GUI
  - MRG-B: Member profiles merged from external systems
  - MRG-F: Member profiles merged from the e*Index GUI
  - UMRG-F: Member profiles unmerged from the e*Index GUI

  For a sample of this report, see page B-17 in "Appendix B: Production Report Samples".

- **Monthly Management Summary Report**
  This report displays a summary of transactions that occurred against the database during the specified month. You can run this report for either the current or the previous month. The information provided in this summary includes the number of each of the following transactions that were performed for the month:
  - UIDs assigned through interface transactions

- UIDs assigned through the GUI
- Merges performed through the interface
- Merges performed through the GUI
- Unmerge transactions
- Deactivate transactions
- Unresolved potential duplicates
- Resolved potential duplicates

For samples of this report, see pages B-18 and B-19 in "Appendix B: Production Report Samples".

- **Yearly Management Summary Report**
  This report displays a summary of transactions that occurred against the database for a one-year period. You can only run this report for the current year. The information provided in this report includes a summary of each transaction listed for the monthly summary report above. For a sample of this report, see page B-20 in "Appendix B: Production Report Samples".

Production Report Tools

The directory containing the report files also contains several supporting files that help create the reports. Be sure to run the following SQL scripts against the e*Index database before running any reports.

- **install_rep_view.sql**
  You must run this script before running any of the e*Index production reports. This script creates the views that are required to extract the information for the e*Index reports. You only need to run this file once against the e*Index database.
- **install_monthly.sql**
  This script calls **monthly_table.sql**, **monthly_proc.sql**, and **yearly_proc.sql** to create the monthly status table (*ui_monthly_stats*) along with the stored procedures for monthly and yearly reporting. The table and procedures are created when you install the e*Index database, so you may not need to run this file.

Running Production Reports

Overview

You can perform any of the following reporting activities using the standard production report files provided with e*Index:

- Run the Daily Update Report
- Run the Duplicate Social Security Report
- Run the Assumed Match Report
- Run the Daily Cross Entity Potential Duplicate Report
- Run the Daily Potential Duplicate Report
- Run the Daily Merge Report
- Run the Daily UnMerge Report
- Run the Weekly Transaction Audit Report
- Run the Monthly Management Summary Report
- Run the Yearly Management Summary Report

Notes:

- *Before you run any reports, make sure to run the SQL scripts* ***install_rep_view.sql*** *and* ***install_monthly.sql****.*
- *Before you begin, you should locate the* ***/uireports/production*** *directory. This is where the production report files are located. Depending on how the files were installed, they should either be on the database server or on the client workstation in the e*Index home directory.*
- *See "Appendix B: Production Report Samples" for examples of each of these reports.*
- *We can help you automate many of these reports. See your SeeBeyond representative for more information.*

Running the Daily Update Report

Run the Daily Update Report to obtain a list of member profiles whose key information was updated on the day designated by the report (either today or yesterday). For samples of this report, see pages B-3 and B-4 in "Appendix B: Production Report Samples".

To run the Daily Update Report

Before you begin:

- ✓ Determine whether you need to run the report against today's transactions or yesterday's
- ✓ Determine where the report files are located, and the path in which you want to store the completed reports

1. If this is the first time you are running the report, continue to step 2. If you have run this report before and have already made the necessary modifications, skip to step 8.
2. If you have a working knowledge of PL/SQL, you can modify this file to customize the report for your organization's specific requirements. To customize the report, do one of the following:

   To modify the report for today's transactions, open the file **rep_daily_update_t.sql** in any text editor.

   To modify the report for yesterday's transactions, open the file **rep_daily_update_y.sql** in any text editor.
3. You can comment out the first line of text, however Oracle ignores this line even if you do not comment it out.
4. The first section of the file defines the format of the report. You can modify the length of each line or field, the name of the column headings, and so on.
5. The second section is the SELECT clause of the SQL statement. Only modify this section if you want to change the information included on the report. If you add or delete fields in this section, be sure to make the corresponding changes to the column definitions in the previous section.
6. The final section of the file is the WHERE clause of the SQL statement. By default, there are two conditions in the WHERE clause that restrict the updated profiles that appear on the report:
   - The member profile must be associated with the system from which the update originated in order to appear on this report. This is especially important to keep in mind when reporting on updates from the GUI, because the GUI can be associated with any system.

     Tip: *In the e*Index database, the field name for system is* ***facility****, and the field name for the updating system is* ***update_facility_id****.*
   - The member profile must have an address type of **H** (for home address) both before and after the update in order to appear on this report.

7 When you complete your modifications to the report file, save and close the file.

8 Open an MS-DOS or Unix command line, and navigate to the directory where the report files are located.

9 Do one of the following:

To print today's transactions, type the following at the command prompt:

sqlplus <un>/<up>@<SID> @rep_daily_update_t <output>

where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, and <output> is the location in which you want to store the report.

To print yesterday's transactions, type the following at the command prompt:

sqlplus <un>/<up>@<SID> @rep_daily_update_y <output>

where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, and <output> is the location in which you want to store the report.

10 To view the report, navigate to the location you specified as your output path, and open the file in any text editor. The report file has an .LST extension.

Running the Duplicate Social Security Report

Run the Duplicate Social Security Report to obtain a list of member profiles that have the same social security number as another member profile. This report displays the profile pairs one under the other so you can view the differences between the two profiles. You need to modify two files to run this report. For samples of this report, see pages B-5 and B-6 in "Appendix B: Production Report Samples".

▶ To run the Duplicate Social Security Report

Before you begin:

- ✓ Determine whether you need to run the report against today's transactions or yesterday's
- ✓ Determine where the report files are located, and the path in which you want to store the completed reports

1 If this is the first time you are running the report, continue to step 2. If you have run this report before and have already made the necessary modifications, skip to step 10.

2 If you have a working knowledge of PL/SQL, you can modify this file to customize the report for your organization's specific requirements. To customize the report, do one of the following:

To modify the report for today's transactions, open the file **rep_dupssn_t.sql** in any text editor.

To modify the report for yesterday's transactions, open the file **rep_ dupssn _y.sql** in any text editor.

3 You can comment out the first line of text, however Oracle ignores this line even if you do not comment it out.

4 The first section of the file defines the format of the report. You can modify the length of each line or field, the name of the column headings, and so on.

5 The second section is the SELECT clause of the SQL statement. Only modify this section if you want to change the information included on the report. If you add or delete fields in this section, be sure to make the corresponding changes to the column definitions in the previous section.

6 In the final section of the file, you can customize the WHERE clause of the SQL statement.

7 When you complete your modifications to the report file, save and close the file.

8 To specify whether to run the report on today's transactions or yesterday's transactions, you need to modify **ui_rep_dupssn.sql**. Open this file in any text editor.

9 Do one of the following:

To print today's transactions, comment out the following lines:

```
start rep_dupssn_py.sql;
start rep_dupssn_y.sql;
```

To print yesterday's transactions, comment out the following lines:

```
start rep_dupssn_pt.sql;
start rep_dupssn_t.sql;

delete from t_local_id;
```

10 Open an MS-DOS or Unix command line, and navigate to the directory where the report files are located.

11 Type the following at the command prompt:

sqlplus <un>/<up>@<SID> @ui_rep_dupssn <output>

where <un> is your user login ID, <up> is your login password, <SID> is

the Oracle SID name of the database, and <output> is the location in which you want to store the report.

12 To view the report, navigate to the location you specified as your output path, and open the file in any text editor. The report file has an .LST extension.

Running the Assumed Match Report

Run the Assumed Match Report to obtain a list of entries in the *ui_assumed_match* table. This table lists member profiles that were automatically merged, and you can use the Assumed Match Report to verify that the records should have been merged. For samples of this report, see pages B-7 and B-8 in "Appendix B: Production Report Samples".

▶ To run the Assumed Match Report

Before you begin:

- ✓ Determine whether you need to run the report against today's transactions or yesterday's
- ✓ Determine where the report files are located, and the path in which you want to store the completed reports

1 If this is the first time you are running the report, continue to step 2. If you have run this report before and have already made the necessary modifications, skip to step 8.

2 If you have a working knowledge of PL/SQL, you can modify this file to customize the report for your organization's specific requirements. To customize the report, do one of the following:

To modify the report for today's transactions, open the file **rep_match_t.sql** in any text editor.

To modify the report for yesterday's transactions, open the file **rep_ match _y.sql** in any text editor.

3 You can comment out the first line of text, however Oracle ignores this line even if you do not comment it out.

4 The first section of the file defines the format of the report. You can modify the length of each line or field, the name of the column headings, and so on.

5 The second section is the SELECT clause of the SQL statement. Only modify this section if you want to change the information included on the report. If you add or delete fields in this section, be sure to make the corresponding changes to the column definitions in the previous section.

6 The final section of the file is the WHERE clause of the SQL statement. By default, there are two conditions in the WHERE clause that restrict the assumed matches that appear on the report:

- The new member profile must be associated with the system from which the assumed match originated in order to appear on this report. This is especially important to keep in mind when reporting on matches that occur in the GUI, since the GUI can be associated with any system.

Tip: *In the e*Index database, the field name for system is* ***facility****, and the field name for the updating system is* ***update_facility_id****.*

- The member profile must have an address type of **H** (for home address) in order to appear on this report.

7 When you complete your modifications to the report file, save and close the file.

8 Open an MS-DOS or Unix command line, and navigate to the directory where the report files are located.

9 Do one of the following:

To print today's transactions, type the following at the command prompt:

sqlplus <un>/<up>@<SID> @rep_match_t <output>

where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, and <output> is the location in which you want to store the report.

To print yesterday's transactions, type the following at the command prompt:

sqlplus <un>/<up>@<SID> @rep_match_y <output>

where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, and <output> is the location in which you want to store the report.

10 To view the report, navigate to the location you specified as your output path, and open the file in any text editor. The report file has an .LST extension.

Running the Daily Cross Entity Potential Duplicate Report

Run the Daily Cross Entity Potential Duplicate Report to obtain a list of entries in the *ui_duplic* table with local IDs from different systems. These records are potential duplicates of one another, and are associated with different systems. Duplicate pairs are displayed one under the other so you

can see the differences between the potential duplicate profiles. For samples of this report, see pages B-9 and B-10 in "Appendix B: Production Report Samples".

To run the Daily Cross Entity Potential Duplicate Report

Before you begin:

- ✓ Determine whether you need to run the report against today's transactions or yesterday's
- ✓ Determine where the report files are located, and the path in which you want to store the completed reports

1. If this is the first time you are running the report, continue to step 2. If you have run this report before and have already made the necessary modifications, skip to step 8.
2. If you have a working knowledge of PL/SQL, you can modify this file to customize the report for your organization's specific requirements. To customize the report, do one of the following:

   To modify the report for today's transactions, open the file **rep_pot_dup_cross_t.sql** in any text editor.

   To modify the report for yesterday's transactions, open the file **rep_pot_dup_cross_y.sql** in any text editor.
3. You can comment out the first line of text, however Oracle ignores this line even if you do not comment it out.
4. The first section of the file defines the format of the report. You can modify the length of each line or field, the name of the column headings, and so on.
5. The second section is the SELECT clause of the SQL statement. Only modify this section if you want to change the information included on the report. If you add or delete fields in this section, be sure to make the corresponding changes to the column definitions in the previous section.
6. The final section of the file is the WHERE clause of the SQL statement. By default, there are two conditions in the WHERE clause that restrict the potential duplicate profiles that appear on the report:
   - The profiles must be associated with the system from which the potential duplicate flag originated in order to appear on this report. This is especially important to keep in mind when reporting on potential duplicates that occur from GUI transactions, since the GUI can be associated with any system.

     Tip: *In the e*Index database, the field name for system is* ***facility****, and the field name for the updating system is* ***update_facility_id****.*

- The member profiles must both have an address type of **H** (for home address) in order to appear on this report.

7 When you complete your modifications to the report file, save and close the file.

8 Open an MS-DOS or Unix command line, and navigate to the directory where the report files are located.

9 Do one of the following:

To print today's transactions, type the following at the command prompt:

sqlplus <un>/<up>@<SID> @rep_pot_dup_cross_t <output>

where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, and <output> is the location in which you want to store the report.

To print yesterday's transactions, type the following at the command prompt:

sqlplus <un>/<up>@<SID> @rep_pot_dup_cross_y <output>

where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, and <output> is the location in which you want to store the report.

10 To view the report, navigate to the location you specified as your output path, and open the file in any text editor. The report file has an .LST extension.

Running the Daily Potential Duplicate Report

Run the Daily Potential Duplicate Report to obtain a list of entries in the *ui_duplic* table with local IDs from the same system. These records are potential duplicates of one another, and are associated with the same system. Duplicate pairs are displayed one under the other so you can see the differences between the potential duplicate profiles. You need to run one report for each system that assigns local IDs in the e*Index system. For samples of this report, see pages B-11 and B-12 in "Appendix B: Production Report Samples".

▶ To run the Daily Potential Duplicate Report

Before you begin:

✓ Determine whether you need to run the report against today's transactions or yesterday's

- ✓ Determine where the report files are located, and the path in which you want to store the completed reports
- ✓ Determine the systems for which you want to run this report

1 If this is the first time you are running the report, continue to step 2. If you have run this report before and have already made the necessary modifications, skip to step 9.

Important! *Perform the following steps for each system for which you want to run same system potential duplicate reports.*

---

2 If you have a working knowledge of PL/SQL, you can modify this file to customize the report for your organization's specific requirements. To customize the report, do one of the following:

If you are using the report for today's transactions, make a copy of the file **rep_pot_dup_same_t.sql** and rename the file by replacing "same" with the system code of the system whose data you want to view.

If you are using the report for yesterday's transactions, make a copy of the file **rep_pot_dup_same_y.sql** and rename the file by replacing "same" with the system code of the system whose data you want to view.

3 Open the new file in any text editor.

4 You can comment out the first line of text, however Oracle ignores this line even if you do not comment it out.

5 The first section of the file defines the format of the report. You can modify the length of each line or field, the name of the column headings, and so on.

6 The second section is the SELECT clause of the SQL statement. Only modify this section if you want to change the information included on the report. If you add or delete fields in this section, be sure to make the corresponding changes to the column definitions in the previous section.

7 The final section of the file is the WHERE clause of the SQL statement. By default, there are three conditions in the WHERE clause that restrict the potential duplicate profiles that appear on the report:

- The member profiles must be associated with the system from which the potential duplicate flag originated in order to appear on this report. This is especially important to keep in mind when reporting on duplicates that occur from GUI transactions, since the GUI can be associated with any system.

  Tip: *In the e*Index database, the field name for system is* ***facility****, and the field name for the updating system is* ***update_facility_id****.*

- The member profile must have an address type of **H** (for home address) in order to appear on this report.
- The updating system must be the system you specify, and the member profiles that appear on the report must have local IDs associated with the system you specify. To specify these systems, modify the following lines of code by replacing **FACILITYID** with the identification codes of the appropriate systems.

```
and t.update_facility_id = 'FACILITYID'
...
and l1.facility = 'FACILITYID'
and l2.facility = 'FACILITYID'
```

8 When you complete your modifications to the report file, save and close the file.

9 Open an MS-DOS or Unix command line, and navigate to the directory where the report files are located.

10 Do one of the following:

To print today's transactions, type the following at the command prompt:

sqlplus <un>/<up>@<SID> @rep_pot_dup_<fac>_t <output>

where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, <fac> is the system code for the system against which you are reporting, and <output> is the location in which you want to store the report.

To print yesterday's transactions, type the following at the command prompt:

sqlplus <un>/<up>@<SID> @rep_pot_dup_<fac>_y <output>

where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, <fac> is the system code for the system against which you are reporting, and <output> is the location in which you want to store the report.

11 To view the report, navigate to the location you specified as your output path, and open the file in any text editor. The report file has an .LST extension.

Running the Daily Merge Report

Run the Daily Merge Report to obtain a list of member profiles that were merged. You can run this report for either the current or previous day's transactions. The merged pairs are displayed one under the other so you can see their differences. For a merge transaction to appear on this report, both profiles must be associated with a home address. For samples of this report, see pages B-13 and B-14 in "Appendix B: Production Report Samples".

To run the Daily Merge Report

Before you begin:

- ✓ Determine whether you need to run the report against today's transactions or yesterday's
- ✓ Determine where the report files are located, and the path in which you want to store the completed reports

1. If this is the first time you are running the report, continue to step 2. If you have run this report before and have already made the necessary modifications, skip to step 8.
2. If you have a working knowledge of PL/SQL, you can modify this file to customize the report for your organization's specific requirements. To customize the report, do one of the following:

   To modify the report for today's transactions, open the file **rep_merge_t.sql** in any text editor.

   To modify the report for yesterday's transactions, open the file **rep_merge_y.sql** in any text editor.
3. You can comment out the first line of text, however Oracle ignores this line even if you do not comment it out.
4. The first section of the file defines the format of the report. You can modify the length of each line or field, the name of the column headings, and so on.
5. The second section is the SELECT clause of the SQL statement. Only modify this section if you want to change the information included on the report. If you add or delete fields in this section, be sure to make the corresponding changes to the column definitions in the previous section.
6. The final section of the file is the WHERE clause of the SQL statement. In this section, you can customize the conditions by which records are selected for this report. By default, a member profile must have an address type of **H** (for home address) in order to appear on this report.
7. When you complete your modifications to the report file, save and close the file.
8. Open an MS-DOS or Unix command line, and navigate to the directory where the report files are located.
9. Do one of the following:

   To print today's transactions, type the following at the command prompt:

   sqlplus <un>/<up>@<SID> @rep_merge_t <output>

where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, and <output> is the location in which you want to store the report.

To print yesterday's transactions, type the following at the command prompt:

sqlplus <un>/<up>@<SID> @rep_merge_y <output>

where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, and <output> is the location in which you want to store the report.

10 To view the report, navigate to the location you specified as your output path, and open the file in any text editor. The report file has an .LST extension.

Running the Daily UnMerge Report

Run the Daily Un-Merge Report to obtain a list of member profiles that were unmerged. You can run this report for either the current or previous day's transactions. The merged pairs are displayed one under the other so you can see their differences. For an unmerge transaction to appear on this report, both profiles must be associated with a home address. For samples of this report, see pages B-15 and B-16 in "Appendix B: Production Report Samples".

▶ To run the Daily UnMerge Report

Before you begin:

- ✓ Determine whether you need to run the report against today's transactions or yesterday's
- ✓ Determine where the report files are located, and the path in which you want to store the completed reports

1 If this is the first time you are running the report, continue to step 2. If you have run this report before and have already made the necessary modifications, skip to step 8.

2 If you have a working knowledge of PL/SQL, you can modify this file to customize the report for your organization's specific requirements. To customize the report, do one of the following:

To modify the report for today's transactions, open the file **rep_unmerge_t.sql** in any text editor.

To modify the report for yesterday's transactions, open the file **rep_unmerge_y.sql** in any text editor.

3 You can comment out the first line of text, however Oracle ignores this line even if you do not comment it out.

4 The first section of the file defines the format of the report. You can modify the length of each line or field, the name of the column headings, and so on.

5 The second section is the SELECT clause of the SQL statement. Only modify this section if you want to change the information included on the report. If you add or delete fields in this section, be sure to make the corresponding changes to the column definitions in the previous section.

6 The final section of the file is the WHERE clause of the SQL statement. In this section, you can customize the conditions by which records are selected for this report. By default, a member profile must have an address type of **H** (for home address) in order to appear on this report.

7 When you complete your modifications to the report file, save and close the file.

8 Open an MS-DOS or Unix command line, and navigate to the directory where the report files are located.

9 Do one of the following:

To print today's transactions, type the following at the command prompt:

sqlplus <un>/<up>@<SID> @rep_unmerge_t <output>

where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, and <output> is the location in which you want to store the report.

To print yesterday's transactions, type the following at the command prompt:

sqlplus <un>/<up>@<SID> @rep_unmerge_y <output>

where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, and <output> is the location in which you want to store the report.

10 To view the report, navigate to the location you specified as your output path, and open the file in any text editor. The report file has an .LST extension.

Running the Weekly Transaction Audit Report

Run the Weekly Transaction Audit Report to obtain a summary of all transactions that occurred against the database on each day of the week you specify. Run this report at the end of each week to get a complete summary. For a sample of this report, see page B-17 in "Appendix B: Production Report Samples".

▶ To run the Weekly Transaction Audit Report

Before you begin:

- ✓ Determine where the report files are located, and the path in which you want to store the completed reports

1. Open an MS-DOS or Unix command line, and navigate to the directory where the report files are located.
2. Type the following at the command prompt:
   sqlplus <un>/<up>@<SID> @ui_weekly_audit <output>

   where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, and <output> is the location in which you want to store the report.
3. At the date prompt, enter the beginning date in **MM/DD/YYYY** format for the week against which you want to report. For example, to report all transactions for the week of June 24 through 30, 2001, type **06/24/2001** at the prompt.
4. To view the report, navigate to the location you specified as your output path, and open the file in any text editor. The report file has an .LST extension.

Note: *The **ui_weekly_audit** script calls **ui_weekly_audit_proc** to set up the temporary table that stores the report information, and then calls **ui_weekly_audit_rpt** to create the weekly report. If you want to customize the appearance of the report, you need to modify the file **ui_weekly_audit_rpt**.*

Running the Monthly Management Summary Report

Run the Monthly Management Summary Report to obtain a summary of the transactions that occurred against the database for the specified month (either the current or previous month). Run this report at the end of each month to get a complete summary. For samples of this report, see pages B-18 and B-19 in "Appendix B: Production Report Samples".

▶ To run the Monthly Management Summary Report

Before you begin:

- ✓ Determine where the report files are located, and the path in which you want to store the completed reports
- ✓ Determine whether you need to run the report against this month's transactions or the previous month's

✓ Make sure that the script **install_monthly.sql** was previously run against the database. This script creates the monthly reporting table, and the monthly and yearly reporting procedures. If you are unsure if this file was run, run the script against the database before running the monthly summary report.

1 If this is the first time you are running the report, continue to step 2. If you have run this report before and have already made the necessary modifications, skip to step 6.

2 If you have a working knowledge of PL/SQL, you can customize the appearance of this report. To customize the report, do one of the following:

To modify the report for the current month's transactions, open the file **monthly_c.sql** in any text editor.

To modify the report for the previous month's transactions, open the file **monthly_p.sql** in any text editor.

3 You can comment out the first line of text, however Oracle ignores this line even if you do not comment it out.

4 The first section of the file defines the format of the report. You can modify the length of each line or field, the name of the column headings, and so on.

5 When you complete your modifications to the report file, save and close the file.

6 Open an MS-DOS or Unix command line, and navigate to the directory where the report files are located.

7 Do one of the following:

To print the current month's transactions, type the following at the command prompt:

sqlplus <un>/<up>@<SID> @monthly _c <output>

where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, and <output> is the location in which you want to store the report.

To print the previous month's transactions, type the following at the command prompt:

sqlplus <un>/<up>@<SID> @monthly_p <output>

where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, and <output> is the location in which you want to store the report.

8 To view the report, navigate to the location you specified as your output path, and open the file in any text editor. The report file has an .LST extension.

Running the Yearly Management Summary Report

Run the Yearly Management Summary Report to obtain a summary of all transactions that occurred against the database for either the current or the previous year. Run this report at the end of each year to get a complete summary. For samples of this report, see pages B-20 in "Appendix B: Production Report Samples".

▶ To run the Yearly Management Summary Report

Before you begin:

- ✓ Determine where the report files are located, and the path in which you want to store the completed reports

1 If this is the first time you are running the report, continue to step 2. If you have run this report before and have already made the necessary modifications, skip to step 5.

2 If you have a working knowledge of PL/SQL, you can customize the appearance of this report. To customize the report, open the file **rep_yearly.sql** in any text editor.

3 The first section of the file defines the format of the report. You can modify the length of each line or field, the name of the column headings, and so on.

4 When you complete your modifications to the report file, save and close the file.

5 Open an MS-DOS or Unix command line, and navigate to the directory where the report files are located.

6 Type the following at the command prompt:

sqlplus <un>/<up>@<SID> @rep_yearly <output>

where <un> is your user login ID, <up> is your login password, <SID> is the Oracle SID name of the database, and <output> is the location in which you want to store the report.

7 To view the report, navigate to the location you specified as your output path, and open the file in any text editor. The report file has an .LST extension.

Appendix A

GUI Report Samples

About this Appendix

Overview

This appendix provides samples of the reports you can run form the e*Index GUI. Formore information about these reports, see Chapter 2 of this guide.

What's Inside

These sample reports can be found on the pages listed below.

Search Results Report A-3
Detail Report A-4
Compare Report A-6
Audit Trail Report A-10

Person Search Result

Date: 5/23/2001 17:08:12

13 Records Returned

Page: 1 / 1

UID	Last Name	First Name	Middle Name	DOB	Gender	SSN	Person Category	Status	Weight
100-000-0006	WARREN	ELIZABETH	JUNE	05/14/1960	FEMALE	554-44-5555	CUSTOMER	ACTIVE	-3.32
100-000-0001	WARREN	ELIZA	J	05/14/1959	FEMALE	555-44-4554	CUSTOMER	ACTIVE	-3.32
100-000-0002	WARRING	JULIA	MARIE	05/12/1945	FEMALE	555-88-8555		MERGED	-3.32
100-000-0003	WARNER	JOHN	MITCHELL	05/14/1960	MALE	555-22-2555	CUSTOMER	ACTIVE	-3.32
100-000-0004	WARDE	EDITH	SARAH	12/11/1940	FEMALE	555-77-7555	CUSTOMER	ACTIVE	-3.32
100-000-0005	WARDE	EDITH	SARAH	12/12/1930	FEMALE	555-44-4555	CUSTOMER	MERGED	-3.32
100-000-0000	WARREN	ELIZABETH	JUNE	05/14/1960	FEMALE	555-44-4555	CUSTOMER	ACTIVE	-3.32
100-000-0007	WARNER	JULIE		05/21/1954	FEMALE	555-44-4555		ACTIVE	-3.32
100-000-0008	WARNER	JONATHON	MIKE	05/14/1995	MALE	- -	PERSON	ACTIVE	-3.32
100-000-0009	WARFIELT	AARON	MARK	06/12/1960	MALE	555-33-3555	CUSTOMER	ACTIVE	-3.32
100-000-0010	WARREN	ELIZABETH	JANE	05/14/1960	FEMALE	555-44-4555	CUSTOMER	ACTIVE	-3.32
100-000-0011	WARNER	JUNE	LIZ	05/14/1960	FEMALE	555-77-7555	CUSTOMER	ACTIVE	-3.32
100-000-0012	WARFIELD	ERIN		05/14/1960	MALE	555-11-1555	CUSTOMER	ACTIVE	-3.32

Person Detail Report

Identification

UID	100-000-000	Status	ACTIVE		
Last Name	WARREN	First Name	ELIZABETH	Middle Name	JUNE
DOB	05/14/1960	Gender	FEMALE	SSN	555-44-4555
R/Access	NONE	Person Category	CUSTOMER		
Title		Suffix		Marital Status	SINGLE
Religion	AGNOSTIC	Language	ENGLISH	Ethnic Group	ENGLISH
Race	WHITE	Veteran Status	NONE		

Maiden		Father's Name	JOSEPH	Spouse's Name
Mother's Maiden	RHAMES	Mother's Name	JULIA	

E-mail	EWARREN@HERE.ORG	Region	WEST	Active Date	12/02/1999
Account Rep.	BRYAN GERMAINE	Member Level	STANDARD	First Order	12/10/1999
Service Rep.	BETH WHITE			Last Order	09/18/2000

Address:

Address Type	HOME				
Address1	3847 SHORELINE DRIVE			Address3	
Address2				Address4	
City	CAPE BURR				
State	CT	Zip	09876 -	Country	UNITED STATES
Address Type	OFFICE				
Address1	3247 WAYFIELD BLVD.			Address3	
Address2				Address4	
City	WAYFIELD				
State	CT	Zip	09877 -	Country	UNITED STATES

Phone Type	Phone	Ext
HOME	989-5554878	
CELLULAR	989-5551277	

Last Name	First Name	Middle Name
BETH	WARREN	
LIZ	WARREN	

System	Local Identifier	Status
CAPE BURR CENTER	234279842	ACTIVE
SHEFFIELD RIDGEVIEW	2SDF234237	ACTIVE

Other ID Name	ID
DEPARTMENT	2323428
HOUSEHOLD	2342342783

Person Detail Report

Type	Date/Time	Comment
SYS	05/16/2001 12:11:49	UI Record 1000000000 was added by UI staff with user id UI
USR	05/23/2001 16:57:53	Possible duplication with 100-000-0011. Forwarded to records for review.

Person Compare Report

Date: 5/23/2001 17:03:43

UID: 1000000006 vs 1000000000

UID	1000000006
Last Name	WARREN
First Name	ELIZABETH
Middle Name	JUNE
DOB	05/14/1960
Gender	FEMALE
Person Category	CUSTOMER
SSN	554445555
R/Access	NONE
Maiden	MILLER
Mother's Maiden	MORSE
Marital Status	DIVORCED
Race	WHITE
Religion	AGNOSTIC
Language	ENGLISH
Suffix	
Title	PHD
Ethnicity	ENGLISH
Veteran Status	UNKNOWN
Mother's Name	SUSAN
Father's Name	JOSEPH
Spouse's Name	

E-mail EWARREN@HERE.ORG
Account Rep. BRYAN GERMAINE
Service Rep. BETH WHITE
Region WEST
Member Level STANDARD

Active Date 12/02/1999
First Order 12/10/1999
Last Order 12/10/1999

Address:

Type HOME
Address1 3247 SHORELINE DRIVE
Address2
Address3
Address4
City CAPE BURR
State CONNECTICUT
Zip 09876 -
Country UNITED STATES

Ck	Type	Phone	Ext
☐	BUSINESS	989-5557877	1121
☐	CELLULAR	988-5552117	

Ck	Last Name	First Name	Middle Name/MI
☐	MILLER	ELIZABETH	JUNE
☐	WARREN	LIZ	

Ck	System	Local Identifier	Status
☐	CAPE BURR CENTER	423423232	ACTIVE

Ck	ID Name	ID
☐	DEPARTMENT	2328427
☐	HOUSEHOLD	3287420472

Person Compare Report

Date: 5/23/2001 17:03:49

UID: 1000000006 vs 1000000000

UID	1000000000
Last Name	WARREN
First Name	ELIZABETH
Middle Name	JUNE
DOB	05/14/1960
Gender	FEMALE
Person Category	CUSTOMER
SSN	555444555
R/Access	NONE
Maiden	
Mother's Maiden	RHAMES
Marital Status	SINGLE
Race	WHITE
Religion	AGNOSTIC
Language	ENGLISH
Suffix	
Title	
Ethnicity	ENGLISH
Veteran Status	NONE
Mother's Name	JULIA
Father's Name	JOSEPH
Spouse's Name	

E-mail EWARREN@HERE.ORG
Account Rep. BRYAN GERMAINE
Service Rep. BETH WHITE
Region WEST
Member Level STANDARD

Active Date 12/02/1999
First Order 12/10/1999
Last Order 09/18/2000

Address:

Type HOME
Address1 3847 SHORELINE DRIVE
Address2
Address3
Address4
City CAPE BURR
State CONNECTICUT
Zip 09876 -
Country UNITED STATES
Type OFFICE
Address1 3247 WAYFIELD BLVD.
Address2
Address3
Address4
City WAYFIELD
State CONNECTICUT
Zip 09877 -
Country UNITED STATES

Ck	Type	Phone	Ext
☐	HOME	989-5554878	
☐	CELLULAR	989-5551277	

Ck	Last Name	First Name	Middle Name/MI
☐	BETH	WARREN	
☐	LIZ	WARREN	

Ck	System	Local Identifier	Status
☐	CAPE BURR CENTER	234279842	ACTIVE
☐	SHEFFIELD RIDGEVIEW	2SDF234237	ACTIVE

Ck	ID Name	ID
☐	DEPARTMENT	2323428
☐	HOUSEHOLD	2342342783

Audit Trail Report

Before **(UID: 1000000000)**

UID	1000000000
Last Name	WARREN
First Name	ELIZABETH
Middle Name	JUNE
DOB	05/14/1960
Gender	FEMALE
Person Category	CUSTOMER
SSN	555444555
R/Access	NONE
Update system	SBYN
Event	UPD
Update Date	5/23/2001 16:56:40
Update User ID	UI
Maiden	
Mother's Maiden	RHAMES
Marital status	SINGLE
Race	WHITE
Religion	AGNOSTIC
Language	ENGLISH
Suffix	
Title	
Ethnic	ENGLISH
Vet Status	NONE
Mother's Name	JULIA
Father's Name	JOSEPH
Spouse's Name	

Audit Trail Report

Before **(UID: 1000000000)**

E-mail EWARREN@HERE.ORG
Account Rep. BRYAN GERMAINE
Service Rep. BETH WHITE
Region WEST
Member Level STANDARD

Active Date 12/02/1999
First Order 12/10/1999
Last Order 09/18/2000

Address:

Address Type HOME
Address1 3847 SHORELINE DRIVE
Address2
Address3
Address4
City CAPE BURR
State CT
Zip 09876 -
Country UNITED STATES

Address Type OFFICE
Address1 3247 WAYFIELD BLVD.
Address2
Address3
Address4
City WAYFIELD
State CT
Zip 09877 -
Country UNITED STATES

Phone Type	Phone	Ext
HOME	9895554878	
CELLULAR	9895551277	

Last Name	First Name	Middle Name
LIZ	WARREN	
BETH	WARREN	

System	Local Identifier	Status
CAPE BURR CENTER	234279842	ACTIVE

Audit Trail Report

After **(UID: 1000000000)**

UID	1000000000
Last Name	WARREN
First Name	ELIZABETH
Middle Name	JUNE
DOB	05/14/1960
Gender	FEMALE
Person Category	CUSTOMER
SSN	555444555
R/Access	NONE
Update system	SBYN
Event	UPD
Update Date	5/23/2001 16:57:58
Update User ID	UI
Maiden	
Mother's Maiden	RHAMES
Marital status	SINGLE
Race	WHITE
Religion	AGNOSTIC
Language	ENGLISH
Suffix	
Title	
Ethnic	ENGLISH
Vet Status	NONE
Mother's Name	JULIA
Father's Name	JOSEPH
Spouse's Name	

Audit Trail Report

After **(UID: 1000000000)**

E-mail	EWARREN@HERE.ORG
Account Rep.	BRYAN GERMAINE
Service Rep.	BETH WHITE
Region	WEST
Member Level	STANDARD

Active Date	12/02/1999
First Order	12/10/1999
Last Order	09/18/2000

Address:

Address Type	HOME
Address1	3847 SHORELINE DRIVE
Address2	
Address3	
Address4	
City	CAPE BURR
State	CT
Zip	09876 -
Country	UNITED STATES
Address Type	OFFICE
Address1	3247 WAYFIELD BLVD.
Address2	
Address3	
Address4	
City	WAYFIELD
State	CT
Zip	09877 -
Country	UNITED STATES

Phone Type	Phone	Ext
HOME	9895554878	
CELLULAR	9895551277	

Last Name	First Name	Middle Name
LIZ	WARREN	
BETH	WARREN	

System	Local Identifier	Status
CAPE BURR CENTER	234279842	ACTIVE
SHEFFIELD RIDGEVIEW	2SDF234237	ACTIVE

Other ID Name	ID
DEPARTMENT	2323428

Audit Trail Report

After **(UID: 1000000000)**

Other ID Name	ID
HOUSEHOLD	2342342783

Potential Duplicate Search Result

Date: 4/28/2002 22:54:05
Page: 1 / 1

Duplicate UID	Existing UID	Reason	Weight	System	Source	User ID	Date
100-000-0003	100-000-0000	POTENTIAL DUPLICATE	14.83	SeeBeyond	GUI	UI	04/28/2002 22:50:23
100-000-0004	100-000-0000	POTENTIAL DUPLICATE	3.26	SeeBeyond	GUI	UI	04/28/2002 22:51:30
100-000-0004	100-000-0003	POTENTIAL DUPLICATE	25.42	SeeBeyond	GUI	UI	04/28/2002 22:51:30
100-000-0007	100-000-0005	POTENTIAL DUPLICATE	7.14	SeeBeyond	GUI	UI	04/28/2002 22:53:57

Potential Duplicate

Date: 4/28/2002 22:54:17
Page: 1 / 1

Duplicate UID	Existing UID	Reason	Weight	System	Source	User ID	Date
100-000-0004	100-000-0000	POTENTIAL DUPLICATE	3.26	SeeBeyond	GUI	UI	04/28/2002 22:51:30
100-000-0003	100-000-0000	POTENTIAL DUPLICATE	14.83	SeeBeyond	GUI	UI	04/28/2002 22:50:23
100-000-0004	100-000-0003	POTENTIAL DUPLICATE	25.42	SeeBeyond	GUI	UI	04/28/2002 22:51:30

Appendix B

Production Report Samples

About this Appendix

Overview

This appendix provides samples of each standard production report included with e*Index. For information on running these reports, see chapter 3 of this guide.

What's Inside

These sample reports can be found on the pages listed below.

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Daily Update Report (previous day) B-4
Duplicate Social Security Report (current day) B-5
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REPORT # DRPTUPDT — Daily UI Update Report for (02/19/2001) — 02/19/2001 11:21

UID #	LID	SYS	Last Name	First Name	MN	Sex	DOB	Address 1	Address 2	City	State
100-000-0044	444005	H2	ASHCROFT	JORDAN		M	08/10/1993	1582 WAYFIELD ST		WARTON	CT
100-000-0044	444005	H2	ASTOR	JORDAN		M	08/10/1993	1852 WAYFIELD ST		WARTON	CT
100-000-0059	444867	H2	BROWNE	BYRON		M	08/10/1979	145 SHEFFIELD ST		CAPTON	CT
100-000-0059	444867	H2	BRAUN	BRYAN		M	08/10/1979	145 SHEFFIELD ST		SHEFFIELD	CT
100-000-0046	444021	H2	BROWNE	BENTON		M	12/10/1974	43682 BLOSSOM AVE		WARTON	CT
100-000-0046	444021	H2	BREWER	BENSON		M	12/10/1975	43682 BLOSSOM AVE		WARTON	CT
100-000-0452	333270	H2	BROWNE	DONNY		M	12/16/1974	7280 ADAMS DR		SHEFFIELD	CT
100-000-0452	333270	H2	BROWN	DONALD		M	12/16/1974	2349 SANORA DR		SHEFFIELD	CT
100-000-0336	888571	H2	JONES	JASON		M	01/10/1974	6342 WASHINGTON DR		CAPE BURR	CT
100-000-0336	888571	H2	JONES	JUSTIN		M	01/01/1974	23487 SHORELINE DR		CAPE BURR	CT
100-000-0593	600058	H2	JONES	LEANNE		F	02/05/1974	5218 4TH ST		CAPE BURR	CT
100-000-0593	600058	H2	STANFORD	LEANNE		F	02/05/1974	324 N SHORELINE DRIVE		CAPE BURR	CT
100-000-0570	999323	H2	JONES	LISBETH		F	01/10/1993	11700 S WAYFIELDRD		SHEFFIELD	CT
100-000-0570	999323	H2	JONES	ELIZABETH		F	01/10/1993	234 N MARTINDALE WAY		SHEFFIELD	CT

REPORT # DRPTUPDT — Daily UI Update Report for (02/18/2001) — 02/19/2001 10:59

UID #	LID	SYS	Last Name	First Name	MN	Sex	DOB	Address 1	Address 2	City	State
100-000-0294	444939	H2	ASHCROFT	SUSAN		F	07/10/1974	333 BLOSSOM AVE	#105	CAPTON	CT
100-000-0294	444939	H2	ASHTON	SUSAN	MARIE	F	07/07/1972	333 BLOSSOM AVE		WARTON	CT
100-000-0060	444483	H2	ASHCROFT	GERALD		M	05/12/1995	3155 BLOSSOM AVE		WARTON	CT
100-000-0060	444483	H2	ASHCROFT	HERALD		M	06/12/1995	2347 FLOWER STREET		WARTON	CT
100-000-0091	222231	H2	BIGGS	SUZZETTE	MAY	F	07/03/1974	5357 W CAPE BURR		CAPE BURR	CT
100-000-0091	222231	H2	BIGGINS	SUZZETTE	MAY	F	08/08/1972	23498 SHORELINE DRIVE		CAPE BURR	CT
100-000-0558	000264	H2	BROWNE	JILLIANE		F	12/10/1979	8687 DENT ST		CAPE BURR	CT
100-000-0558	000264	H2	CHASE	JILLIANE		F	12/10/1979	347 SHORELINE DRIVE		CAPE BURR	CT
100-000-0288	444880	H2	JOHNSON	MELANIE		F	07/07/1993	13692 RIVERSIDE ST		CAPTON	CT
100-000-0288	444880	H2	JOHNS	MEILANIE		F	07/07/1990	13692 RIVERSIDE ST		CAPTON	CT
100-000-0801	111989	H2	JONES	PHILLIP	MARK	M	04/10/1979	9173 CANAS STREET		CAPTON	CT
100-000-0801	111989	H2	JOHNSON	PHILLIP	MARK	M	07/07/1975	2348 COSTA ST		WAYFIELD	CT
100-000-0280	444436	H2	STILLMAN	TERRY		M	12/10/1993	5370 COLE DR		WARTON	CT
100-000-0280	444436	H2	STILL	DERRICK	JOHN	M	12/10/1993	5370 COLETTE DR		WARTON	CT
100-000-0465	111155	H2	STILLMAN	JARED		M	01/10/1950	7044 BLOSSOM ST		WARTON	CT
100-000-0465	111155	H2	STILLER	JARED		M	01/10/1950	1505 FLOWER STREET		WARTON	CT

REPORT # DRPTDUPSSN Duplicate Social Security Report 02/18/2001 12:06
for (02/18/2001)

SSN	Last Name	First Name MN	DOB	Sex	UID #	LID	SYS	LID	SYS	LID	SYS	LID	SYS
SSN	Last Name	First Name MN	DOB	Sex	UID #	LID	SYS	LID	SYS	LID	SYS	LID	SYS
123-45-6789	THOMAS	MADELINE	08/10/1993	F	100-000-0015	2348723	H1	777606	H2				
123-45-6789	STILLMAN	GAYLE	04/19/1993	F	100-000-0024	222231	H2						
123-45-6789	THOMAS	MADELINE	08/10/1993	F	100-000-0015	2348723	H1	777606	H2				
123-45-6789	WILMAN	DIANE	08/10/1995	F	100-000-0001	888468	H2						
999-99-9999	RODRIGUEZ	BENITO	04/23/1985	M	100-000-0012	2984723	H1	777568	H2				
999-99-9999	JONES	RYAN	08/10/1974	M	100-000-0023	888913	H2						
555-55-5555	JONES	DANNY	01/16/1990	M	100-000-1400	93872398	H2						
555-55-5555	RODRIGUEZ	DIANA	01/10/1673	F	100-000-0102	111216	H2						
555-55-5555	RODRIGUEZ	JULIO	04/13/1955	M	100-000-1396	2227498	H1						
555-55-5555	JONES	DANNY	01/16/1990	M	100-000-1400	93872398	H2						
555-55-5555	RODRIGUEZ	JULIO	04/13/1955	M	100-000-1396	2227498	H1						
555-55-5555	RODRIGUEZ	DIANA	01/10/1673	F	100-000-0102	183216	H2						
777-77-7777	BIGGS	BRENDA	12/12/1990	F	100-000-1401	24829472	H2						
777-77-7777	OVERLAND	SUSAN	08/10/1989	M	100-000-0648	700009	H2						
777-77-7777	THOMAS	MARILEE	07/10/1974	F	100-000-0074	444006	H2						
777-77-7777	BIGGINS	SUZZETTE	08/08/1972	F	100-000-0091	111231	H2						

REPORT # DRPTDUPSSN — Duplicate Social Security Report for (02/18/2001) — 02/19/2001 11:23

SSN	Last Name	First Name MN	DOB	Sex	UID #	LID	SYS	LID	SYS	LID	SYS	LID	SYS
123-45-6789	THOMAS	MADELINE	08/10/1993	F	100-000-0015	1256781	H1	845678	H2				
123-45-6789	STILLMAN	GAYLE	04/19/1993	F	100-000-0024	222785	H2						
123-45-6789	THOMAS	MADELINE	08/10/1993	F	100-000-0015	3216548	H1	777845	H2				
123-45-6789	WILMAN	DIANE	08/10/1995	F	100-000-0001	1254852	H2						
999-99-9999	RODRIGUEZ	BENITO	04/23/1985	M	100-000-0012	2458751	H1	777482	H2				
999-99-9999	JONES	RYAN	08/10/1974	M	100-000-0023	555896	H2						
555-55-5555	JONES	DANNY	01/16/1990	M	100-000-1400	92459245	H2						
555-55-5555	RODRIGUEZ	DIANA	01/10/1673	F	100-000-0102	123456	H2						
555-55-5555	JONES	DANNY	01/16/1990	M	100-000-1400	45698754	H2						
555-55-5555	SMARTE	DAVID	12/21/1974	M	100-000-0133	222245	H2						
555-55-5555	RODRIGUEZ	JULIO	04/13/1955	M	100-000-1396	8245498	H1						
555-55-5555	JONES	DANNY	01/16/1990	M	100-000-1400	14564231	H2						
555-55-5555	RODRIGUEZ	JULIO	04/13/1955	M	100-000-1396	1245121	H1						
555-55-5555	RODRIGUEZ	DIANA	01/10/1673	F	100-000-0102	444846	H2						
555-55-5555	RODRIGUEZ	JULIO	04/13/1955	M	100-000-1396	1231248	H1						
555-55-5555	SMARTE	DAVID	12/21/1974	M	100-000-0133	444484	H2						

```
REPORT # DRPTUIMATCH                                    UI Assumed Match Report                                    02/18/2001 12:12
                                                            for 02/18/2001


UID             Last Name                 First Name       MN       Sex DOB        SSN         Mother's Name        Father's Name        Weight
--------------- ------------------------- ---------------- -------- --- ---------- ----------- -------------------- -------------------- -----------
SYS LID #       Last Name                 First Name       MN       Sex DOB        SSN         Mother's Name        Father's Name
--- ----------- ------------------------- ---------------- -------- --- ---------- ----------- -------------------- --------------------
Address1                    Address2                  City                          ST Zip     Ext  County               Country
--------------------------- ------------------------- ------------------------------ -- ------- ---- -------------------- ------------
1000000015      THOMAS                    MADELINE           SUE      F   08/10/1993 123-45-6789 KATHIE               JOHN                 15.650000
H1  2348723     THOMAS                    MADELINE           SUE      F   08/10/1993 --
2349 COSMIC WAY                                         CAPE BURR                     CT 09876        CBR                  USA

1000000818      BIGGS                     MORGAN             J        M   05/05/1974 --          ELIZABETH            SEAN                 15.650000
H1  2347283     BIGGS                     MORGAN             J        M   05/05/1974 --
2348 SHORELINE DRIVE                                    CAPE BURR                     CT 09876        CBR                  USA

1000000012      RODRIGUEZ                 BENITO             OSCAR    M   04/23/1985 234-56-7890 MADELINE             JOSE                 15.650000
H1  2984723     RODRIGUEZ                 BENITO             OSCAR    M   04/23/1985 --
2347 32ND STREET              5                         CAPE BURR                     CT 09876        CAP                  USA

1000000038      SMARTE                    REBECCA                     F   08/10/1978 --          DEBORAH SMARTE       DONALD SMARTE        15.650000
H1  0923842     SMARTE                    REBECCA                     F   08/10/1978 --
2348 BELDEN STREET                                      CAPE BURR                     CT 09876        CAP                  USA

1000000155      OVERLAND                  JANICE             BETH     F   07/12/1974 --          MELANIE OVERLAND                          15.650000
H1  0987242     OVERLAND                  JANICE             BETH     F   07/12/1974 --
2348 BLOSSOM STREET                                     CAPE BURR                     CT 09876        CAP                  USA
```

```
REPORT # DRPTUIMATCH                                    UI Assumed Match Report                                    02/19/2001 11:42
                                                            for 02/18/2001

UID             Last Name                 First Name       MN       Sex DOB        SSN         Mother's Name        Father's Name        Weight
--------------- ------------------------- ---------------- -------- --- ---------- ----------- -------------------- -------------------- -----------
SYS LID #       Last Name                 First Name       MN       Sex DOB        SSN         Mother's Name        Father's Name
--- ----------- ------------------------- ---------------- -------- --- ---------- ----------- -------------------- --------------------
Address1                  Address2                    City                          ST Zip     Ext  County               Country
------------------------- --------------------------- ------------------------------ -- ------- ---- -------------------- ------------
1000000015      THOMAS                    MADELINE           SUE      F   08/10/1993 123-45-6789 KATHIE               JOHN                 15.650000
H1  2348723     THOMAS                    MADELINE           SUE      F   08/10/1993 --
2349 COSMIS WAY                                       CAPE BURR                     CT 09876        CBR                  USA

1000000818      BIGGS                     MORGAN             J        M   05/05/1974 --          ELIZABETH            SEAN                 15.650000
H1  2347283     BIGGS                     MORGAN             J        M   05/05/1974 --
2348 SHORELINE DRIVE                                  CAPE BURR                     CT 09876        CBR                  USA

1000000012      RODRIGUEZ                 BENITO             OSCAR    M   04/23/1985 999-99-9999 MADELINE             JOSE                 15.650000
H1  2984723     RODRIGUEZ                 BENITO             OSCAR    M   04/23/1985 --
2347 32ND STREET              5                       CAPE BURR                     CT 09876        CAP                  USA

1000000038      SMARTE                    REBECCA                     F   08/10/1978 --          DEBORAH SMARTE       DONALD SMARTE        15.650000
H1  0923842     SMARTE                    REBECCA                     F   08/10/1978 --
2348 PARCE STREET                                     CAPE BURR                     CT 09876        CAP                  USA

1000000155      OVERLAND                  JANICE             BETH     F   07/12/1974 --          MELANIE OVERLAND                          15.650000
H1  0987242     OVERLAND                  JANICE             BETH     F   07/12/1974 --
2348 BLOSSOM STREET                                    CAPE BURR                      CT 09876        CAP                  USA
```

REPORT # DRPTPOTDUP Daily Cross Entity Potential Duplicate Report
02/18/2001 12:18

for (02/18/2001)

New UID #	SYS	LID	Last Name	First Name	MN	DOB	Sex	Address	City	SSN	Reason	
Existing UID #	SYS	LID	Last Name	First Name	MN	DOB	Sex	Address	City	SSN	Reason	Weight
100-000-1396	H1	9827498	RODRIGUEZ	JULIO		04/13/1955	M			555-55-5555	POTENTIAL DUPLIC	
100-000-0102	H2	333216	RODRIGUEZ	DIANA		01/10/1673	F	5252 SHORELINE DR	WAYFIELD	555-55-5555	POTENTIAL DUPLIC	1.79
100-000-1396	H1	9827498	RODRIGUEZ	JULIO		04/13/1955	M			555-55-5555	POTENTIAL DUPLIC	
100-000-0010	H2	777514	RODRIGUEZ	JULIO		12/05/1974	M	8436 24TH ST	WAYFIELD	999-88-8999	POTENTIAL DUPLIC	2.56
100-000-1403	H1	2348729	THOMAS	JOSEPH		08/08/1955	M	23498 WAYFIELD ROAD	WAYFIELD	444-44-4444	POTENTIAL DUPLIC	
100-000-0058	H2	777463	THOMAS	JOSEPH		03/12/1974	M	523 COSMIC WAY	CAPTON	411-11-1111	POTENTIAL DUPLIC	2.56
100-000-0015	H1	2348723	THOMAS	MADELINE		08/10/1993	F	2349 COSMIS WAY	CAPE BURR	123-45-6789	POTENTIAL DUPLIC	
100-000-0523	H2	222353	THOMAS	MADELINE		07/10/1989	F	17000 BLOSSOM ST	BENTON	--	POTENTIAL DUPLIC	5.86
100-000-1396	H1	9827498	RODRIGUEZ	JULIO		04/13/1955	M			555-55-5555	POTENTIAL DUPLIC	
100-000-1354	H2	714067	RODRIGUEZ	JULIO		07/10/1985	M	1968 BENTON	WARTON	--	POTENTIAL DUPLIC	5.86
100-000-1403	H1	2348729	THOMAS	JOSEPH		08/08/1955	M	23498 WAYFIELD ROAD	WAYFIELD	444-44-4444	POTENTIAL DUPLIC	
100-000-1171	H2	310682	THOMAS	JOE		08/12/1999	M	1460 MADELINE ST	CAPTON	--	POTENTIAL DUPLIC	5.86
100-000-1396	H1	9827498	RODRIGUEZ	JULIO		04/13/1955	M			555-55-5555	POTENTIAL DUPLIC	
100-000-1094	H2	213866	RODRIGUEZ	JULES		07/23/1999	M	5145 WEST 39TH AVE	CAPTON	--	POTENTIAL DUPLIC	5.86
100-000-0155	H1	0987242	OVERLAND	JANICE		07/12/1974	F	2348 BLOSSOM STREET	CAPE BURR	--	POTENTIAL DUPLIC	
100-000-0204	H2	818571	THOMAS	JANICE		07/12/1974	F	1501 BENTON DR	CAPTON	--	POTENTIAL DUPLIC	8.25
100-000-1396	H1	9827498	RODRIGUEZ	JULIO		04/13/1955	M			555-55-5555	POTENTIAL DUPLIC	
100-000-0729	H2	323878	RODRIGUEZ	JULIO		04/12/1950	M	3857 HIGH ST	CAPTON	--	POTENTIAL DUPLIC	9.13

REPORT # DRPTPOTDUP — Daily Cross Entity Potential Duplicate Report
02/19/2001 11:48

for (02/18/2001)

New UID #	SYS	LID	Last Name	First Name	MN	DOB	Sex	Address	City	SSN	Reason	
Existing UID #	**SYS**	**LID**	**Last Name**	**First Name**	**MN**	**DOB**	**Sex**	**Address**	**City**	**SSN**	**Reason**	**Weight**
100-000-1396	H1	9827498	RODRIGUEZ	JULIO		04/13/1955	M			555-55-5555	POTENTIAL DUPLIC	
100-000-0102	H2	333216	RODRIGUEZ	DIANA		01/10/1673	F	5252 SHORELINE DR	WAYFIELD	555-55-5555	POTENTIAL DUPLIC	1.79
100-000-1396	H1	9827498	RODRIGUEZ	JULIO		04/13/1955	M			555-55-5555	POTENTIAL DUPLIC	
100-000-0010	H2	777514	RODRIGUEZ	JULIO		12/05/1974	M	8436 24TH ST	WAYFIELD	999-88-8999	POTENTIAL DUPLIC	2.56
100-000-1403	H1	2348729	THOMAS	JOSEPH		08/08/1955	M	23498 WAYFIELD ROAD	WAYFIELD	444-44-4444	POTENTIAL DUPLIC	
100-000-0058	H2	777463	THOMAS	JOSEPH		03/12/1974	M	523 COSMIC WAY	CAPTON	411-11-1111	POTENTIAL DUPLIC	2.56
100-000-0015	H1	2348723	THOMAS	MADELINE		08/10/1993	F	2349 COSMIS WAY	CAPE BURR	123-45-6789	POTENTIAL DUPLIC	
100-000-0523	H2	222353	THOMAS	MADELINE		07/10/1989	F	17000 BLOSSOM ST	BENTON	--	POTENTIAL DUPLIC	5.86
100-000-1396	H1	9827498	RODRIGUEZ	JULIO		04/13/1955	M			555-55-5555	POTENTIAL DUPLIC	
100-000-1354	H2	714067	RODRIGUEZ	JULIO		07/10/1985	M	1968 BENTON	WARTON	--	POTENTIAL DUPLIC	5.86
100-000-1403	H1	2348729	THOMAS	JOSEPH		08/08/1955	M	23498 WAYFIELD ROAD	WAYFIELD	444-44-4444	POTENTIAL DUPLIC	
100-000-1171	H2	310682	THOMAS	JOE		08/12/1999	M	1460 MADELINE ST	CAPTON	--	POTENTIAL DUPLIC	5.86
100-000-1396	H1	9827498	RODRIGUEZ	JULIO		04/13/1955	M			555-55-5555	POTENTIAL DUPLIC	
100-000-1094	H2	213866	RODRIGUEZ	JULES		07/23/1999	M	5105 WEST 39TH AVE	CAPTON	--	POTENTIAL DUPLIC	5.86
100-000-1396	H1	9827498	RODRIGUEZ	JULIO		04/13/1955	M			555-55-5555	POTENTIAL DUPLIC	
100-000-0729	H2	323878	RODRIGUEZ	JULIO		04/12/1950	M	3857 HIGH ST	CAPTON	--	POTENTIAL DUPLIC	9.13

REPORT # DRPTPOTDUP
02/18/2001 12:20

Daily Potential Duplicate Report

for (02/18/2001)

New UID #	SYS	LID	Last Name	First Name	MN	DOB	Sex	Address	City	SSN	Reason	
Existing UID #	SYS	LID	Last Name	First Name	MN	DOB	Sex	Address	City	SSN	Reason	Weight
100-000-1402	H2	73824729	STILLMAN	RODNEY		08/08/1974	M	23947 55TH STREET	SHEFFIELD	888-88-8888	POTENTIAL DUPLIC	
100-000-1399	H2	72947294	JOHNSON	JAMES		04/04/1974	M			888-88-8888	POTENTIAL DUPLIC	0.82
100-000-0801	H2	718989	JOHNSON	PHILLIP		07/07/1975	M	2348 PARCE ST	WAYFIELD	888-88-8888	POTENTIAL DUPLIC	
100-000-1399	H2	72947294	JOHNSON	JAMES		04/04/1974	M			888-88-8888	POTENTIAL DUPLIC	4.95
100-000-1398	H2	98029348	WARREN	SPENCER		09/09/1994	M	2348 PAULA STREET	CAPE BURR	777-77-7777	POTENTIAL DUPLIC	
100-000-0062	H2	809876	WARREN	SPENCER		05/10/1995	M	51458 SHEFFIELD ST	CAPTON	--	POTENTIAL DUPLIC	5.86
100-000-1399	H2	72947294	JOHNSON	JAMES		04/04/1974	M			888-88-8888	POTENTIAL DUPLIC	
100-000-0572	H2	619794	JOHNSON	JAMES		01/10/1974	M	3248 DENT AVE	SHEFFIELD	--	POTENTIAL DUPLIC	5.86
100-000-1400	H2	93872398	JONES	DANNY		01/16/1990	M	34278 FLOWER STREE	CAPE BURR	555-55-5555	POTENTIAL DUPLIC	
100-000-0902	H2	714772	JONES	DAN		05/10/1978	M	4950 BEONTON WAY	CAPE BURR	--	POTENTIAL DUPLIC	5.86
100-000-1402	H2	73824729	STILLMAN	RODNEY		08/08/1974	M	23947 55TH STREET	SHEFFIELD	888-88-8888	POTENTIAL DUPLIC	
100-000-0097	H2	805000	STILLMAN	RODNEY		08/01/1974	M	5202 WARTON	WARTON	111-11-1116	POTENTIAL DUPLIC	9.09
100-000-1397	H2	20482384	STILLMAN	MISTY		05/14/1979	F	34587 SANORA ROAD	SHEFFIELD	--	POTENTIAL DUPLIC	
100-000-0104	H2	805246	STILLMAN	MISTY		08/16/1979	F	5845 N 14TH ST	MARTINDALE	--	POTENTIAL DUPLIC	9.13
100-000-1400	H2	93872398	JONES	DANNY		01/16/1990	M	34278 FLOWER STREE	CAPE BURR	555-55-5555	POTENTIAL DUPLIC	
100-000-0264	H2	714152	JONES	DANNY		01/16/1989	M	8867 BLOSSOM ST	CAPE BURR	--	POTENTIAL DUPLIC	9.13
100-000-1401	H2	24829472	BIGGS	BRENDA		12/12/1990	F	2348 BRONSON ROAD	CAPE BURR	777-77-7777	POTENTIAL DUPLIC	
100-000-0244	H2	714057	BIGGS	BRENDA		12/16/1993	F	3686 S WAYFIELD ST	CAPTON	--	POTENTIAL DUPLIC	9.13

REPORT # DRPTPOTDUP
02/19/2001 11:48

Daily Potential Duplicate Report

for (02/18/2001)

New UID #	SYS	LID	Last Name	First Name	MN	DOB	Sex	Address	City	SSN	Reason	
Existing UID #	SYS	LID	Last Name	First Name	MN	DOB	Sex	Address	City	SSN	Reason	Weight
100-000-1402	H2	73824729	STILLMAN	RODNEY		08/08/1974	M	23947 55TH STREET	SHEFFIELD	888-88-8888	POTENTIAL DUPLIC	
100-000-1399	H2	72947294	JOHNSON	JAMES		04/04/1974	M			888-88-8888	POTENTIAL DUPLIC	0.82
100-000-0801	H2	718989	JOHNSON	PHILLIP		07/07/1975	M	2348 PARCE ST	WAYFIELD	888-88-8888	POTENTIAL DUPLIC	
100-000-1399	H2	72947294	JOHNSON	JAMES		04/04/1974	M			888-88-8888	POTENTIAL DUPLIC	4.95
100-000-1398	H2	98029348	WARREN	SPENCER		09/09/1994	M	2348 PAULA STREET	CAPE BURR	777-77-7777	POTENTIAL DUPLIC	
100-000-0062	H2	809876	WARREN	SPENCER		05/10/1995	M	51458 SHEFFIELD ST	CAPTON	--	POTENTIAL DUPLIC	5.86
100-000-1399	H2	72947294	JOHNSON	JAMES		04/04/1974	M			888-88-8888	POTENTIAL DUPLIC	
100-000-0572	H2	619794	JOHNSON	JAMES		01/10/1974	M	3248 DENT AVE	SHEFFIELD	--	POTENTIAL DUPLIC	5.86
100-000-1400	H2	93872398	JONES	DANNY		01/16/1990	M	34278 FLOWER STREE	CAPE BURR	555-55-5555	POTENTIAL DUPLIC	
100-000-0902	H2	714772	JONES	DAN		05/10/1978	M	4950 BENTON WAY	CAPE BURR	--	POTENTIAL DUPLIC	5.86
100-000-1402	H2	73824729	STILLMAN	RODNEY		08/08/1974	M	23947 55TH STREET	SHEFFIELD	888-88-8888	POTENTIAL DUPLIC	
100-000-0097	H2	805000	STILLMAN	RODNEY		08/01/1974	M	5202 WARTON	WARTON	111-11-1116	POTENTIAL DUPLIC	9.09
100-000-1397	H2	20482384	STILLMAN	MISTY		05/14/1979	F	34587 SANORA ROAD	SHEFFIELD	--	POTENTIAL DUPLIC	
100-000-0104	H2	805246	STILLMAN	MISTY		08/16/1979	F	5845 N 14TH ST	MARTINDALE	--	POTENTIAL DUPLIC	9.13
100-000-1400	H2	93872398	JONES	DANNY		01/16/1990	M	34278 FLOWER STREE	CAPE BURR	555-55-5555	POTENTIAL DUPLIC	
100-000-0264	H2	714152	JONES	DANNY		01/16/1989	M	8867 BLOSSOM ST	CAPE BURR	--	POTENTIAL DUPLIC	9.13
100-000-1401	H2	24829472	BIGGS	BRENDA		12/12/1990	F	2348 BRONSON ROAD	CAPE BURR	777-77-7777	POTENTIAL DUPLIC	
100-000-0244	H2	714057	BIGGS	BRENDA		12/16/1993	F	3686 S WAYFIELD ST	CAPTON	--	POTENTIAL DUPLIC	9.13

Report #: DRPTMERGE Daily UI Merge Report by User 02/18/2001 12:28

UI for (02/18/2001)

User ID:UI

Kept UID #	Last Name	First Name	MN	DOB	Sex	Address	City	SSN
Unkept UID #	Last Name	First Name	MN	DOB	Sex	Address	City	SSN
100-000-0796	RAMSEY	RYAN		08/10/1955	M	520 DOLT ST	SHEFFIELD	555-44-4555
100-000-0876	RAMSEY	RYAN	JOHN	05/12/1979	M	1982 PENFIELD ST	WARTON	555-44-5555
100-000-0946	RODRIGUEZ	BENTON		03/10/1999	M	772 BENTON STREET	WARTON	777-88-7777
100-000-1158	RODRIGUEZ	BENTON		07/10/1999	M	772 BENTON STREET	WARTON	--
100-000-0259	RODRIGUEZ	DARIN	JAMES	04/12/1993	M	9320 PARCE DR	WAYFIELD	444-88-9999
100-000-1137	RODRIGUEZ	DARIN	JAMES	01/13/1999	M	8682 WARTON AVE	CAPE BURR	--
100-000-0857	RODRIGUEZ	CHIP	D	07/10/1999	M	1021 RIVERSIDE	SHEFIELD	--
100-000-1063	RODRIGUEZ	CHIP	D	02/05/1998	M	536 HARRISON	SHEFIELD	777-44-1111
100-000-0260	RODRIGUEZ	MARYANNE		05/10/1993	F	14638 W LUDLOW ST	WARTON	--
100-000-0620	RODRIGUEZ	MARYANNE		04/12/1974	F	2004 W 18TH	WARTON	--
100-000-0232	RODRIGUEZ	MICHAEL	SCOTT	08/12/1993	M	7511 FLOWER STREET	CAPE BURR	444-55-8888
100-000-1189	RODRIGUEZ	MICHAEL	SCOTT	08/10/1985	M	NEED ADDRESS		--
100-000-0475	RODRIGUEZ	PHILLIP		02/10/1974	M	1521 SHORELINE DR	CAPTON	--
100-000-1316	RODRIGUEZ	PHILLIP		02/10/1997	M	3503 W 25TH AVE	CAPTON	--

Report #: DRPTMERGE Daily UI Merge Report by User 02/19/2001 11:45

UI for (02/18/2001)

User ID:UI

Kept UID #	Last Name	First Name	MN	DOB	Sex	Address	City	SSN
Unkept UID #	Last Name	First Name	MN	DOB	Sex	Address	City	SSN
100-000-0796	RAMSEY	RYAN		08/10/1955	M	520 DOLT ST	SHEFFIELD	555-44-4555
100-000-0876	RAMSEY	RYAN	JOHN	05/12/1979	M	1982 PENFIELD ST	WARTON	555-44-5555
100-000-0946	RODRIGUEZ	BENTON		03/10/1999	M	772 BENTON STREET	WARTON	777-88-7777
100-000-1158	RODRIGUEZ	BENTON		07/10/1999	M	772 BENTON STREET	WARTON	--
100-000-0259	RODRIGUEZ	DARIN	JAMES	04/12/1993	M	9320 PARCE DR	WAYFIELD	444-88-9999
100-000-1137	RODRIGUEZ	DARIN	JAMES	01/13/1999	M	8682 WARTON AVE	CAPE BURR	--
100-000-0857	RODRIGUEZ	CHIP	D	07/10/1999	M	1021 RIVERSIDE	SHEFIELD	--
100-000-1063	RODRIGUEZ	CHIP	D	02/05/1998	M	536 HARRISON	SHEFIELD	777-44-1111
100-000-0260	RODRIGUEZ	MARYANNE		05/10/1993	F	14638 W LUDLOW ST	WARTON	--
100-000-0620	RODRIGUEZ	MARYANNE		04/12/1974	F	2004 W 18TH	WARTON	--
100-000-0232	RODRIGUEZ	MICHAEL	SCOTT	08/12/1993	M	7511 FLOWER STREET	CAPE BURR	444-55-8888
100-000-1189	RODRIGUEZ	MICHAEL	SCOTT	08/10/1985	M	NEED ADDRESS		--
100-000-0475	RODRIGUEZ	PHILLIP		02/10/1974	M	1521 SHORELINE DR	CAPTON	--
100-000-1316	RODRIGUEZ	PHILLIP		02/10/1997	M	3503 W 25TH AVE	CAPTON	--

Report #: DRPTUNMRG Daily UI Un-Merge Report by User 02/18/2001 12:36

UI for (02/18/2001)

User ID:UI

Unmerge UID1	Last Name	First Name	MN	DOB	Sex	Address	City	SSN
Unmerge UID2	Last Name	First Name	MN	DOB	Sex	Address	City	SSN
100-000-0592	RODRIGUEZ	MICHAEL	GEORGE	07/10/1950	M	14 PACE PL	CAPE BURR	777-88-9999
100-000-0338	ROYCE	MICHAEL	G	07/10/1950	M	3631 N ALLEN ST	MARTINDALE	--
100-000-0909	RODRIGUEZ	MICHAEL		12/10/1985	M	31 WAYFIELD DR	SHEFFIELD	--
100-000-0592	RODRIGUEZ	MICHAEL	GEORGE	07/10/1950	M	14 PACE PL	CAPE BURR	555-22-4444
100-000-0978	RODRIGUEZ	MICHAEL	ANTHONY	12/10/1999	M	853 SHEFFIELD WY	SHEFFIELD	--
100-000-0053	RODRIGUEZ	MICHAEL		08/12/1979	M	4589 SHEFFIELD WY	WARTON	--
100-000-0978	RODRIGUEZ	MICHAEL		12/10/1999	M	853 SHEFFIELD WY	SHEFFIELD	444-55-8888
100-000-0232	RODRIGUEZ	MICHAEL	SCOTT	08/12/1993	M	7511 FLOWER STREET	CAPE BURR	--
100-000-0957	RODRIGUEZ	MICHEL		04/16/1997	F	6252 PERRY ST	WARTON	222-33-4444
100-000-0237	RODRIGUEZ	MICHEL		07/10/1993	F	3264 STUART ST	CAPTON	--
100-000-0695	RODRIGUEZ	SUZETTE	RENE	05/07/1950	M	975 MORRE	SHEFFIELD	--
100-000-0422	RODRIGUEZ	SUZETTE	R	07/12/1995	M	2462 WASHINGTON ST	CAPTON	--
100-000-0983	RODRIGUEZ	SUZETTE	MAY	07/10/1999	M	1340 CANYON DR	MARTINDALE	--
100-000-0304	RODRIGUEZ	SUZETTE	MAY	12/16/1974	M	7005 LEEDWOOD DR	CAPTON	188-82-2882

Report #: DRPTUNMRG Daily UI Un-Merge Report by User 02/19/2001 11:50

UI for (02/18/2001)

Unmerge UID1	Last Name	First Name	MN	DOB	Sex	Address	City	SSN
Unmerge UID2	Last Name	First Name	MN	DOB	Sex	Address	City	SSN
100-000-0592	RODRIGUEZ	MICHAEL	GEORGE	07/10/1950	M	14 PACE PL	CAPE BURR	777-88-9999
100-000-0338	ROYCE	MICHAEL	G	07/10/1950	M	3631 N ALLEN ST	MARTINDALE	--
100-000-0909	RODRIGUEZ	MICHAEL		12/10/1985	M	31 WAYFIELD DR	SHEFFIELD	--
100-000-0592	RODRIGUEZ	MICHAEL	GEORGE	07/10/1950	M	14 PACE PL	CAPE BURR	555-22-4444
100-000-0978	RODRIGUEZ	MICHAEL	ANTHONY	12/10/1999	M	853 SHEFFIELD WY	SHEFFIELD	--
100-000-0053	RODRIGUEZ	MICHAEL		08/12/1979	M	4589 SHEFFIELD WY	WARTON	--
100-000-0978	RODRIGUEZ	MICHAEL		12/10/1999	M	853 SHEFFIELD WY	SHEFFIELD	444-55-8888
100-000-0232	RODRIGUEZ	MICHAEL	SCOTT	08/12/1993	M	7511 FLOWER STREET	CAPE BURR	--
100-000-0957	RODRIGUEZ	MICHEL		04/16/1997	F	6252 PERRY ST	WARTON	222-33-4444
100-000-0237	RODRIGUEZ	MICHEL		07/10/1993	F	3264 STUART ST	CAPTON	--
100-000-0695	RODRIGUEZ	SUZETTE	RENE	05/07/1950	M	975 MORRE	SHEFFIELD	--
100-000-0422	RODRIGUEZ	SUZETTE	R	07/12/1995	M	2462 WASHINGTON ST	CAPTON	--
100-000-0983	RODRIGUEZ	SUZETTE	MAY	07/10/1999	M	1340 CANYON DR	MARTINDALE	--
100-000-0304	RODRIGUEZ	SUZETTE	MAY	12/16/1974	M	7005 LEEDWOOD DR	CAPTON	188-82-2882

UI to Rep M Transaction Audit Report
For Week of 02/23/01

Transactions by Day

	SUNDAY 02/18/01	MONDAY 02/19/01	TUESDAY 02/20/01	WEDNESDAY 02/21/01	THURSDAY 02/22/01	FRIDAY 02/23/01	SATURDAY 02/24/01	Weekly Total
ADD-B	58	78	73	49	81	63	45	447
UPD-B	76	94	114	78	74	88	32	556
DEA-F	0	3	0	1	3	0	0	7
ADD-F	0	14	7	23	19	12	0	75
MRG-B	4	12	17	9	14	0	2	58
MRG-F	0	6	0	14	13	4	0	37
UMRG-F	0	1	0	3	0	1	0	5
Daily Totals	138	208	211	177	204	168	79	1185

02/18/2001 12:55

REPORT # MNRPTSUM Monthly UI Management Summary Report 02/20/2001
10:48

for (FEBRUARY 2001)

Totals by Transaction Type
for the month of FEBRUARY

New UI Numbers Assigned(Total) Through Interface Transactions	New UI Numbers Assigned(Total) Through the UI Add Function	UI Merge Through Interface Transactions	UI Merge Through the UI Merge Function	UI Un-Merge Transactions	UI Deactivate Transactions	UI Potential Duplicates Unresolved	UI Potential Duplicates Resolved
1520	115	129	114	20	23	47	117

REPORT # MNRPTSUM Monthly UI Management Summary Report 02/19/2001
10:58

for (JANUARY 2001)

Totals by Transaction Type
for the month of JANUARY

New UI Numbers Assigned(Total) Through Interface Transactions	New UI Numbers Assigned(Total) Through the UI Add Function	UI Merge Through Interface Transactions	UI Merge Through the UI Merge Function	UI Un-Merge Transactions	UI Deactivate Transactions	UI Potential Duplicates Unresolved	UI Potential Duplicates Resolved
1621	101	145	103	13	10	14	129

Page 1

REPORT # YRRPTSUM Yearly UI Management Summary Report 02/18/2001 12:58

for (2001)

Year to Date Totals by Transaction Type

New UI Numbers Assigned(Total) Through Interface Transactions	New UI Numbers Assigned(Total) Through the UI Add Function	UI Merge Through Interface Transactions	UI Merge Through the UI Merge Function	UI Un-Merge Transactions	UI Deactivate Transactions	UI Potential Duplicates Unresolved	UI Potential Duplicates Resolved
18240	1380	2916	1776	148	104	177	1404

Page 1