e*Index Global Identifier Product Suite

e*Index™ Administrator User's Guide

Version 4.5.3

SEEBEYOND

e*Index Administrator User's Guide - Version History	
Date	**Purpose**
June 2001	Current through version 4.5
December 2001	Current through version 4.5.1
April 2002	Current through version 4.5.2
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Table of Contents

Introduction

About this Chapter

Overview

This Introduction welcomes new and experienced e*Index Administrator users and explains how to use this guide. e*Index Administrator is a data maintenance system that allows you to create and maintain the data in your code tables for e*Index, and to configure the GUI, queries, and system parameters for e*Index. This document describes the user interface for SeeBeyond's e*Index Administrator.

The following diagram illustrates the contents of each major topic in this chapter.

Welcome	Learn where to start in this guide if you are a new or experienced user
About This Guide	Learn how to use this guide
About e*Index Administrator	Learn about the functions and features of e*Index Administrator
Additional Resources	Learn about related publications you may wish to review
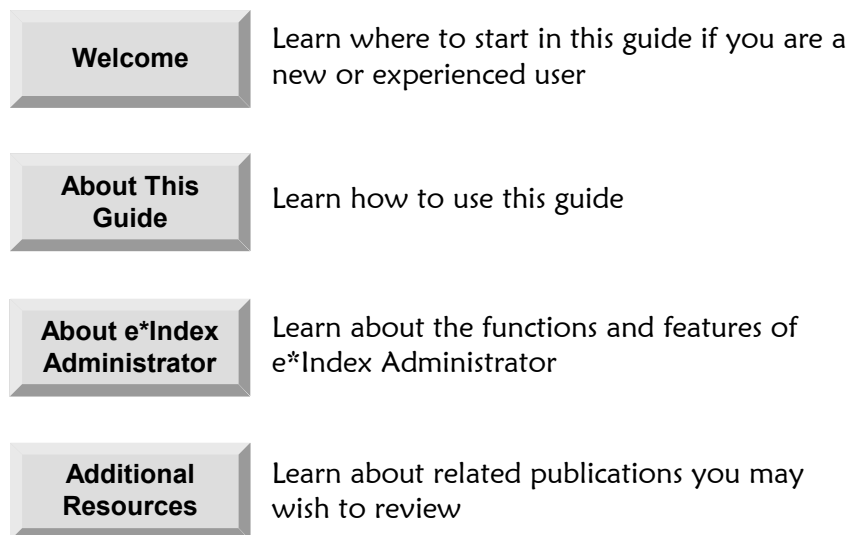
Welcome

Welcome to e*Index Administrator, the code table maintenance application and configuration tool for e*Index.   e*Index Administrator controls all of the table maintenance functions for the e*Index product suite. Table maintenance functions allow you to edit and maintain certain codes for processing data and to create the supporting data for your member profiles. The supporting data populates the drop-down lists in the e*Index GUIs. e*Index Administrator also provides the tools you need to configure GUI appearance, data queries, international settings, and system parameters, such as search parameters, display options, and so on.

To New Users

If you are new to e*Index Administrator, you should browse through this guide before you begin to use the software. Please pay particular attention to the overview section 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.

To Established Users

If you are a more advanced e*Index Administrator user, you may prefer to use this guide as a quick reference to find information about forgotten or unfamiliar tasks. If you know what you need to do, but can't remember exactly how to do it, you can easily find what you need in the Table of Contents. Or, you can browse through the guide and find the appropriate step-by-step procedure by scanning headings and instruction titles.

About this Guide

What is the Purpose of this Guide?

This guide provides the information you need to quickly get started with
e*Index Administrator. It includes navigational instructions, functional
instructions, and background information about the application's features.
This guide provides the information you need to use all of the functions of
e*Index Administrator.

What is the Scope of this Guide?

This guide provides step-by-step instructions for all of the functions of
e*Index Administrator, such as creating and maintaining information about
your business and the members who participate throughout your business,
creating and maintaining processing codes for that data, and configuring the
GUIs, database, queries, and system parameters. You can configure
minimum and maximum matching probability weights, specify the format of
certain fields, choose display options, and so on.

This guide does not include information or instructions on setting up
security, working with e*Index Monk APIs, using any other e*Index GUIs, or
installing e*Index applications. These topics are covered in the appropriate
user's guide.

Who Should Use this Guide?

Any user who needs to learn how to use e*Index Administrator should read
this guide. Intermediate or advanced users who need a refresher on using
some of the basic functions of e*Index Administrator should also read this
guide. A thorough knowledge of e*Index Administrator is not needed to
understand this guide. It is assumed that the reader has some knowledge of
e*Index Global Identifier.

In order to understand the information presented in Chapter 6, "Configuring
the Matching Algorithm", you need to have a strong understanding of the
Vality® INTEGRITY™ matching algorithm and Vality rule set files.

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.   Each chapter contains instructions for performing e*Index Security

procedures preceded by background information that will help you perform each procedure.

How is this Guide is Organized?

This guide is divided into four chapters that cover the topics shown below.

Chapter	Topics
Chapter 1, Introduction	■ Welcome ■ About this Guide ■ About e*Index Administrator ■ Additional Resources
Chapter 2, Getting Started	■ Accessing e*Index Administrator ■ Learning About the e*Index Administrator Interface ■ Getting Help ■ Exiting e*Index Administrator
Chapter 3, Creating e*Index Code Table Data	■ Learning About e*Index Code Table Data ■ Defining e*Index Code Table Data
Chapter 4, Maintaining e*Index Code Table Data	■ Learning About Maintenance and Configuration Tasks ■ Modifying Code Table Data ■ Configuring e*Index
Chapter 5, Customizing e*Index	■ Learning About e*Index Customizations ■ Defining Control Key Values ■ Configuring Display Options ■ Configuring Country-Specific Options ■ Configuring Queries
Chapter 6, Configuring the Matching Algorithm	■ About Vality INTEGRITY and e*Index ■ Learning About e*Index Rule Sets ■ Maintaining Rule Set Information ■ Configuring Rule Sets ■ Configuring Rule Set Files

What Conventions Are Used in this Guide?

Before you start using e*Index Administrator, it is important to understand the typographic, icon, special notation, and other conventions used in this guide.

Typographic Conventions

The following typographic conventions are used in this and other e*Index publications.

Item	Convention	Example
Book titles	Title caps, italic	See the *e*Index Global Identifier User's Guide*
Button names, key names, and key combinations	Bold	**OK** button **F1** key **Alt+Shift+V** key combination
Chapter titles (and section titles within chapters)	Title caps, in quotation marks	See Chapter 4, " Maintaining e*Index Code Table Data" See "Defining e*Index Code Table Data" later in this chapter
Menu names and commands	Bold, capitalization is identical to the interface	**Functions** menu **Action** menu **Save** command
Messages	Bold	**Country description is not entered.**
New terms	Italic	This information is stored in the *ui_veteran* table.
Window, page, and dialog titles	Title cap	System Maintenance window Print dialog

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.

Mouse Conventions

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

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

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

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

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

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

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

- **Move** means to point to an object on the screen, such as an e*Index window, and drag the mouse to move the object to a screen location of your choice.

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

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

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

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

Field Description Conventions

This guide explains how to perform certain tasks and describes the fields that appear on the e*Index Administrator windows that you use to accomplish those tasks. Field descriptions appear at the end of each procedure, and are referenced by topic name from the step in which you are required to modify one or more field values. For example:

3

    identifying information (for more information, see "About System Fields" following this procedure).

This step identifies the name of the topic that describes the fields you need to use

Each field description topic identifies and describes the fields you need to use first, and then describes any checkbox options that appear on the window. If applicable, a description of display-only fields on the window is also provided. For example:

Fields you need to use to complete the procedure

In this field …	type or select …
Country	The country in which the system is located.
	No default
Local ID Length	The length of the unique identification number assigned to each member by this system (does not include dashes).
	No default

Checkbox options you can select during the procedure

Select this option …	to specify that …
Visible	The selected field appears on the e*Index windows. If this option is not selected, then the displayed field will not appear on the e*Index windows.

Display-only fields you may encounter while performing the procedure

This field or column …	displays this information …
Date Time and **Last Modified**	The date that the system information was last updated.

About e*Index Administrator

Overview

This section of the chapter provides background information about the functions and features of e*Index Administrator.

What is e*Index Administrator?

e*Index Administrator is a data maintenance tool that allows you to create and customize the data in the code tables of your e*Index database. Some of the code table data you create is used to populate information in member profiles, such as ethnicities, marital statuses, and languages. Some of the data provides information about your business, such as the computer systems and departments in your enterprise. Some of the data in the code tables is associated with processing codes. e*Index Administrator also provides the ability to configure several attributes of e*Index to match your data processing requirements, and to configure system parameters for e*Index using a set of control keys.

What are Code Tables?

Code tables store the data that you use to populate the values in the drop-down lists of the e*Index GUIs. Several fields in the e*Index GUI allow you to select an item from a drop-down list of options. To enter data into these fields, you need to click the down-arrow button next to the field and then select the appropriate option from the resulting list. This list is controlled by the data elements you enter into the code tables through e*Index Administrator.

The code tables also store processing codes for the data elements that you add to the database. Some processing codes are used by the e*Index applications to help determine how to process certain data elements.

Code tables are separated into two types, Custom Code Tables and Common Code Tables. For more information about code tables, see "What is e*Index Code Table Data?" in Chapter 3 of this guide.

What are Control Keys?

e*Index Administrator provides a set of *control keys* that allow you to configure the system parameters for e*Index. Through the control keys, you can specify which fields appear on the e*Index GUI, how searches are processed, how matching algorithm weights are processed, and so on. The

parameter associated with each control key is described under "What Control Keys are Available?" in Chapter 5 of this guide.

What are Rule Sets?

Rule sets are sets of files that store matching process rules for the matching algorithm. These files can be customized to suit your matching requirements, but should only be modified by someone familiar with the Vality INTEGRITY matching algorithm. A default rule set is supplied for matching against demographic data. Several country-specific rule sets are included for parsing addresses, which allows searching against member addresses. The address rule sets include files for addresses in France, United Kingdom, Ireland, Australia, and the United States.

What are the Features of e*Index Administrator?

e*Index Administrator allows you to customize information and system parameters for your e*Index environment.   From the e*Index Administrator GUI, you can perform the following functions.

■ **Code Table Data Maintenance**
You can add, update, deactivate, and delete data within the code tables using e*Index Administrator. Code tables store information and processing codes for the computer systems, departments, and source systems within your business enterprise. They also store information and processing codes for the demographic attributes of your members, such as languages, ethnicities, countries, marital statuses, religions, and so on. Users can enter certain information for a member profile in e*Index by choosing from the entities you create in the code tables.

■ **System Configuration**
You can configure the system parameters of e*Index using e*Index Administrator's Control Key Maintenance function. A set of control keys allows you to specify system parameters, such as matching weight thresholds and processing rules, limits on the number of allowed search results, required search fields, country and date formats, potential duplicate processing rules, and so on. You can also specify display and debugging options.

■ **GUI Configuration**
You can configure the GUI windows of e*Index using e*Index Administrator's Display Configuration Maintenance function. This function allows you to specify the fields that appear on the GUI windows, and to specify a field name for each field you choose to display. The Display Configuration function provides you with broad flexibility in determining the types of data you want to display for each member.

- **Configurable Candidate Selection (CCS)**
  Before e*Index matches against individual records, it selects a subset of candidate records from the database on which to match. The selection of the candidate subset is based on a specific set of criteria. A default set of criteria is provided for both phonetic searches and potential duplicate evaluation. e*Index Administrator provides the ability to customize the criteria sets used for each search, giving you greater flexibility in deciding which member attributes to use for selecting the candidate records.

- **Rule Set Configuration**
  e*Index Administrator provides the ability to customize information about the rules sets used by the Vality ® INTEGRITY™ matching algorithm. You can modify information contained in the rule set files, specify which rules sets to use, load new rule set files into the database, and delete existing rule set files. Rule sets should only be modified by an administrator who has been fully trained in Vality INTEGRITY, as any changes to the rule sets affect how member profiles are matched and may influence data integrity. Your SeeBeyond representative can assist you with customizing the Vality rule set files.

- **Country-specific Implementation**
  e*Index Administrator allows you to specify country-specific information for your e*Index implementation. This functionality allows you to specify the country format to use; modify titles on the e*Index windows; specify address parsing information; define the formats of the national identifier, telephone numbers, and postal codes; and so on. Currently, Australia, England, France, Ireland, and United States are supported.

- **Security**
  Security is provided through a separate GUI, and includes basic access to the database tables through user login and password activities, as well as access to the functions and actions of e*Index Administrator. Access can be restricted by application module, online function, actions within the functions, data element, user ID, and so on.

Additional Resources

SeeBeyond has developed a suite of e*Index user's 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 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.

- *Working with Reports for e*Index Global Identifier*
  Provides background information about the GUI and standard reports provided with e*Index, and explains how to modify and run the standard reports (for an Oracle installation only).

- *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 4.5.2 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.

Getting Started

About this Chapter

Overview

This chapter helps you to become familiar with e*Index Administrator and includes the basic instructions to help you to put e*Index Administrator to work quickly.

The following diagram illustrates the contents of each major topic in this chapter.
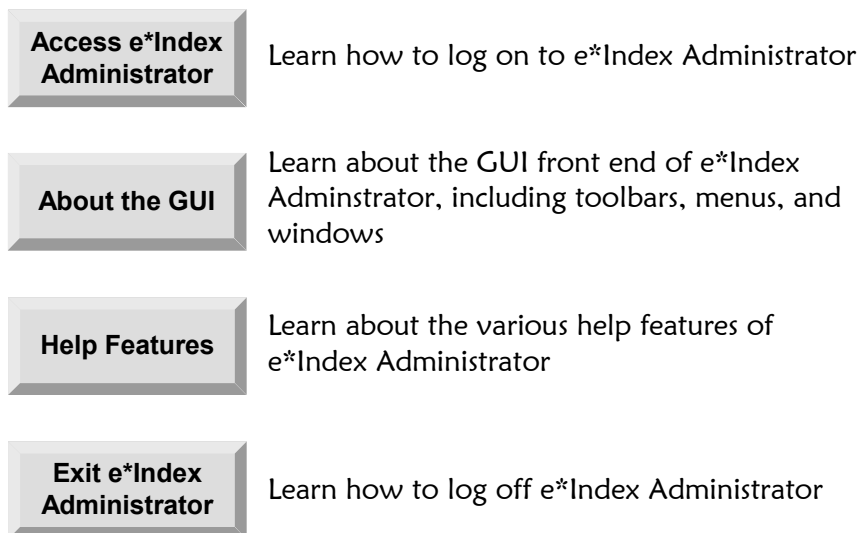
Access e*Index Administrator	Learn how to log on to e*Index Administrator
About the GUI	Learn about the GUI front end of e*Index Adminstrator, including toolbars, menus, and windows
Help Features	Learn about the various help features of e*Index Administrator
Exit e*Index Administrator	Learn how to log off e*Index Administrator

Accessing e*Index Administrator

Overview

This section of the chapter provides the instructions you need to get up and running with the e*Index Administrator application.

Logging on to e*Index Administrator

Before you can use e*Index Administrator, you must first log on to the program by specifying your login ID, password, and perhaps other information such as the database you want to use.

Specify your login
information on the
e*Index Administrator
Login window
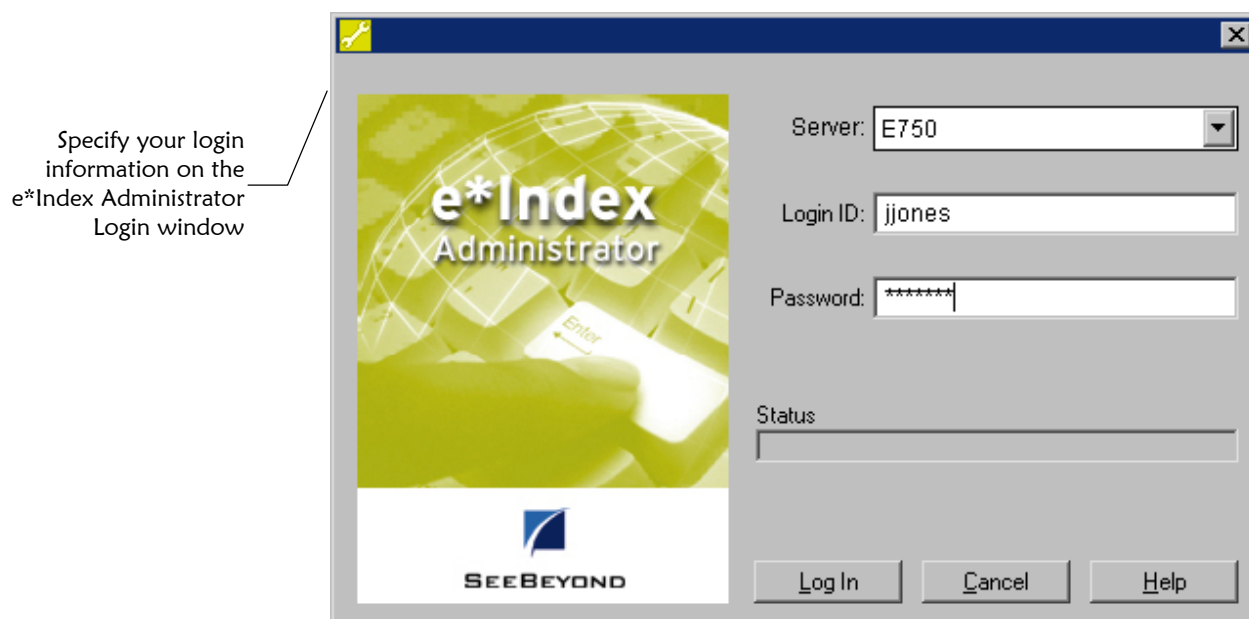
▶ To log on to e*Index Administrator

Before you begin:

   ✓   Make sure you have a user ID and password for e*Index Administrator

e*Index
Administrator icon

1 To access e*Index Administrator, double-click the e*Index Administrator icon on the workstation desktop. This launches e*Index Administrator, and the Login window appears.

2 In the Server field, select the name of the e*Index database you want to access.

Note: *Only databases that are defined in the e*Index initialization file,* ***stc_ua.ini****, appear in the drop-down list for this field. See your System Administrator if the database name you want does not appear.*

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

[Sign-On]

Sign-On button

4 In the lower portion of the login window, click **Sign-On**. The e*Index Administrator Main window appears.
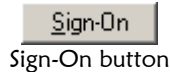
Changing Your Password

Once you log into e*Index Administrator, you may need to change your password for various reasons. For example, your System Administrator may configure a specific period of time after which you must change your password. The administrator may also configure the application to require that you change your password the first time you log on to the system.

Tip: *You should change your password periodically. The recommended frequency for your organization is based on internal security procedures. You can change your password at any time.*

Change
Password
dialog
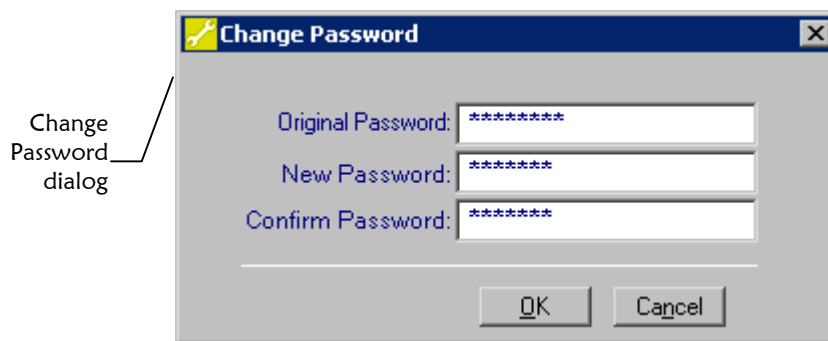
▶ **To change your password**

Before you begin:

✓ Determine the new password you want to use

[Change Password tool icon]

Change Password
tool

1 On the Primary Toolbar, click **Change Password**. The Change Password dialog appears.

2 On the Change Password dialog, fill in the password fields (for more information, see "About Password Fields" following this procedure).

OK

OK button

3 On the Change Password dialog, click **OK**. Your new password is saved to the database.

About Password Fields

The password fields, located on the Change Password dialog, allow you to change your existing password to a new password.

In this field …	type or select …
Original Password	The password you currently use to log into the e*Index applications. No default
New Password	The new password you want to use to log on. No default *Tip: Passwords may not be common words or names.*
Confirm Password	The same password you typed in the **New Password** field. No default

Learning About the e*Index Administrator Interface

Overview

This section of the chapter provides background information about the user interface of e*Index Administrator, the windows you will use, and common menu options.

About the Graphical User Interface (GUI)

The design of the user window follows a standard Microsoft Windows progression based on user functionality. The application includes standard graphical elements, such as windows, dialog boxes, drop-down menus, action buttons, and icon tools.

Click any word on the Main Menu to display a drop-down menu with a list of commands from which you can choose.

The Main Menu, with the Window drop down menu displayed
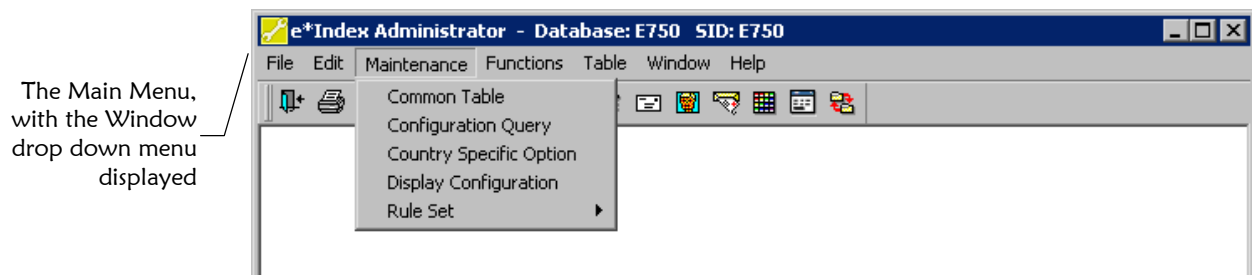
What is the e*Index Administrator Main Window?

The e*Index Administrator Main Window is the first window that appears when you log on to e*Index Administrator. This window consists of the Main Menu bar, the Primary Toolbar, and several standard Windows graphic elements.

The name of the
database you are
connected to appears
on the Title Bar

Use the Title Bar icon
to perform several
window actions

Use standard Windows
buttons to minimize,
restore, and close the Main
window

Title bar

Main Menu bar

Primary Tool bar

e*Index Administrator
Application windows
appear here

Status bar
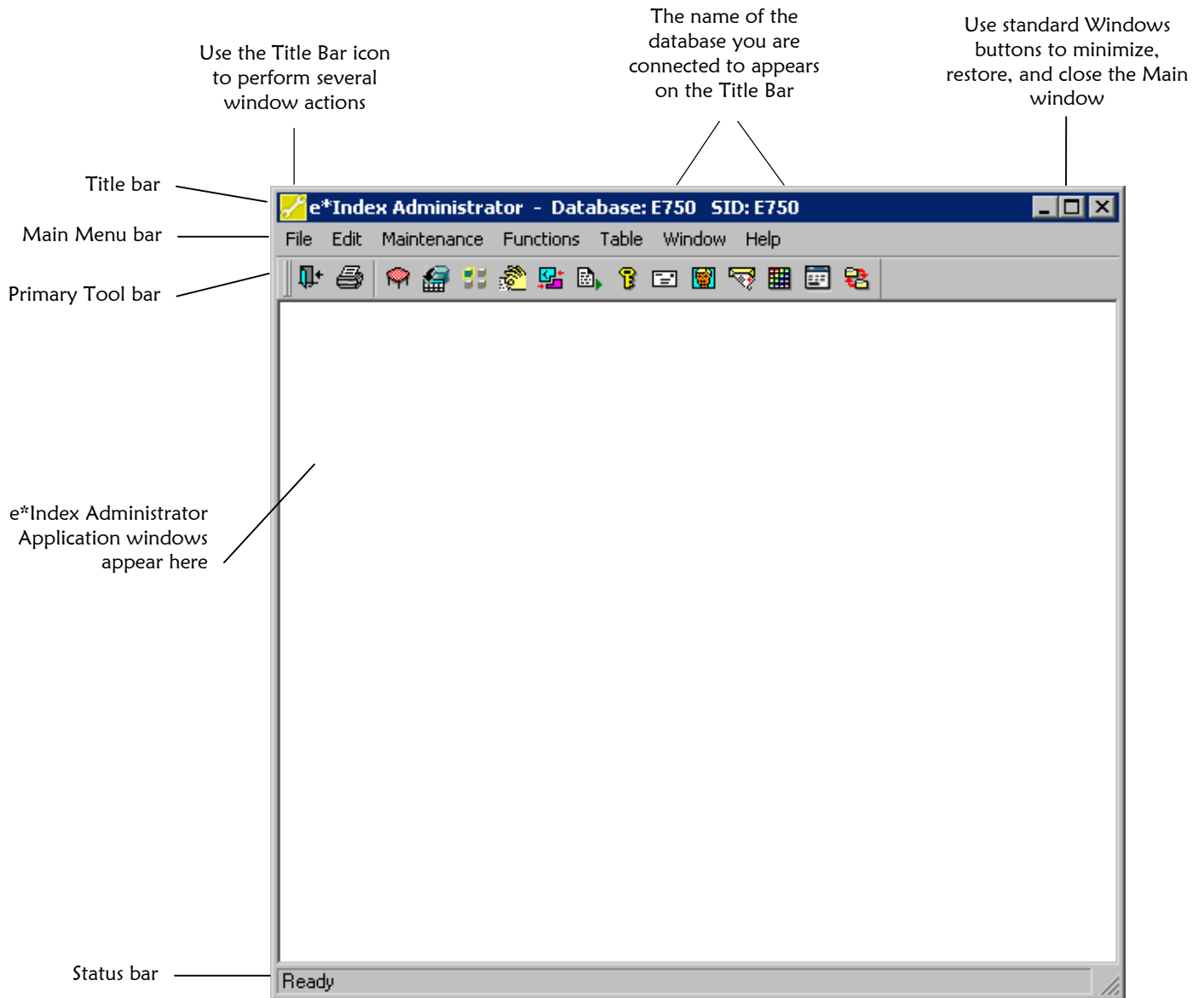
The e*Index Administrator window is the first window that appears when you log on.

What is the Main Menu?

The Main Menu bar lists the names of seven drop-down menus (File, Edit, Maintenance, Functions, Table, Window, and Help) from which you can perform a variety of functions. When you select a menu from the Main Menu bar, the available commands appear on drop-down lists. The Maintenance and Table menus, where you can choose which database function to perform, are used most frequently.

When you access the Common Table Maintenance window, an additional drop-down menu, named **Options**, appears. When you access any code table maintenance function, the Main Menu bar lists an additional drop-down menu, named **Action**, with commands specific to the displayed function.

Once you display a drop-down menu, you can select an option from the menu by clicking it with your mouse or by pressing the underlined letter of the command on your keyboard.

About the File Menu

The *File Menu* on the Main Menu contains standard Windows options, such as Close, Print Active Screen, Printer Setup, and Exit.
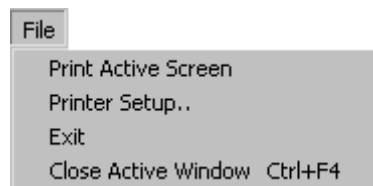
■ **Print Active Screen**
The *Print Active Screen* option allows you to print the current active window. This option becomes very useful when referencing a particular window.

■ **Printer Setup**
The *Printer Setup* option allows you to select and set up a printer for the current active session.
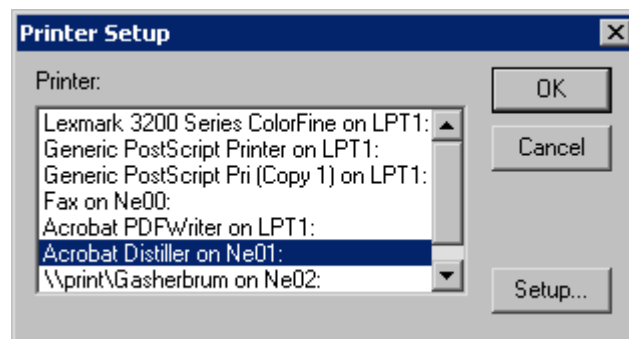
■ **Exit**
The *Exit* option terminates the application and returns to the Windows Desktop.

■ **Close Active Window**
The *Close Active Window* option closes the currently displayed window and returns to the previously displayed window.

About the Edit Menu

The options available in the *Edit Menu* allow you to undo the most recent action and to copy, cut, and paste information.
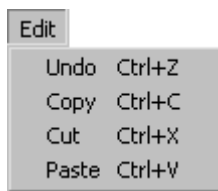
■ **Undo**
Use this command to undo the most recent action (cut, copy or paste) and return to the previous status.

■ **Copy**
This command copies the contents of the highlighted field to the clipboard.

■ **Cut**
This command removes the contents of the highlighted field and places them on the clipboard.

■ **Paste**
This command places the contents of the clipboard into the currently highlighted field.

About the Maintenance Menu

The options available in the *Maintenance Menu* allow you to access the Common Table Maintenance functions and to configure the candidate selection process.
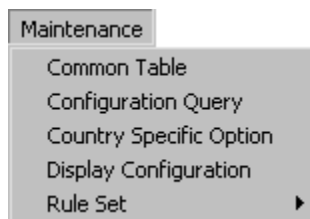
■ **Common Table**
The *Common Table* command opens the Common Table Maintenance window, from which you can add, delete, and modify data elements in the common code tables. For more information about adding common

table data elements, see "Step 2: Define Common Table Data Elements" in Chapter 3 of this guide. For more information about maintaining common table date, see "Modifying Common Table Data Elements" and "Deleting Common Table Data Elements" in Chapter 4 of this guide.

■ **Configuration Query**
The *Configuration Query* command allows you to customize the candidate selection process that is used for phonetic searches and for matching records. For more information about the Configuration Query function, see "Configuring Queries" in Chapter 5 of this guide.

■ **Country Specific Option**
The *Country Specific Option* command allows you to customize certain country-specific attributes, such as postal codes and identification numbers that are unique to each country. For more information about the Country Specific Option function, see "Configuring Country-Specific Options" in Chapter 5 of this guide.

■ **Display Configuration**
The *Display Configuration* command allows you to customize the appearance of data fields on the e*Index GUIs by changing the names of fields, and by hiding and displaying specific fields. For more information about the Display Configuration function, see "Configuring Display Optons" in Chapter 5 of this guide.

■ **Rule Set**
The *Rule Set* command allows you to customize the files used by the matching algorithm. You can modify the files in each rule set, load new rule set files into the database, and specify which rule sets to use. For more information about customizing e*Index rule sets, see Chapter 6, "Configuring the Matching Algorithm".

About the Functions Menu

The option on the *Functions Menu*, Change Password, opens a dialog box that allows you to change your password for the e*Index applications.
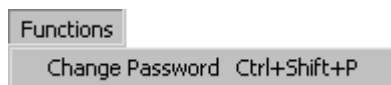
About the Table Menu

The options available on the *Table Menu* allow you to access the custom code tables, which store information about your company, such as computer systems and non-unique identifiers used by your company. This menu also provides the configuration functions for e*Index.
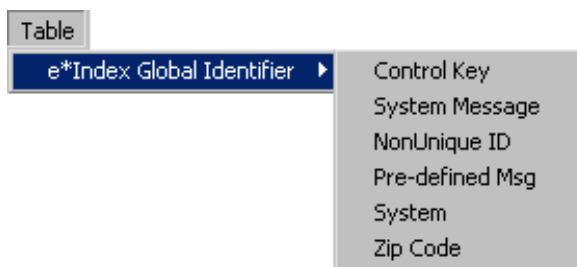
- ■ **e*Index Global Identifier**
  This command allows you to add, modify, and delete information in the
  custom code tables for e*Index. It also allows you to configure the system
  parameters for your e*Index applications. When you select the e*Index
  option, a drop-down list of all of the e*Index table maintenance functions
  appears. The maintenance functions include Control Key, System
  Message, NonUnique ID, Pre-defined Msg, System, and Zip Code.
  Chapters 3 and 4 of this guide describe each custom table maintenance
  function. The Control Key function is described in Chapter 5.

About the Conditional Menus

When you access certain functions in e*Index Administrator, an optional
menu appears on the Main Menu. The **Action** menu appears when you
select a specific code table maintenance function, either from the Table
Maintenance option or from the Common Table Maintenance window. This
menu displays actions specific to the open window. The **Options** window
appears when you access the Common Table Maintenance window. This
menu displays options that allow you to add, modify, and delete information
in the common code tables.

About the Window Menu

The *Window Menu* contains standard commands available with most
Windows applications. These commands allow you to customize the
appearance of your e*Index Administrator windows and toolbars for the
current session. The Windows Menu also displays a list of all open windows.
You can select a window name from the list to display that window.
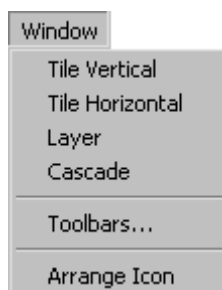
- ■ **Tile Vertical**
  The *Tile Vertical* option arranges open windows vertically.

- **Tile Horizontal**
  The *Tile Horizontal* option tiles all open windows horizontally.

- **Layer**
  The *Layer* option brings all open windows back to their original size, with the active window displayed.

- **Cascade**
  The *Cascade* option displays all open windows in a descending cascade.

- **Toolbars**
  The *Toolbars* option allows you to customize your display options for the e*Index Administrator toolbars and icons. You can define whether to display balloon help or descriptive text along with each toolbar button. For more information about the Toolbars option, see Chapter 2, "Getting Started," in your *e*Index Global Identifier User's Guide*.

Use the Toolbars window to modify the appearance and location of your toolbar
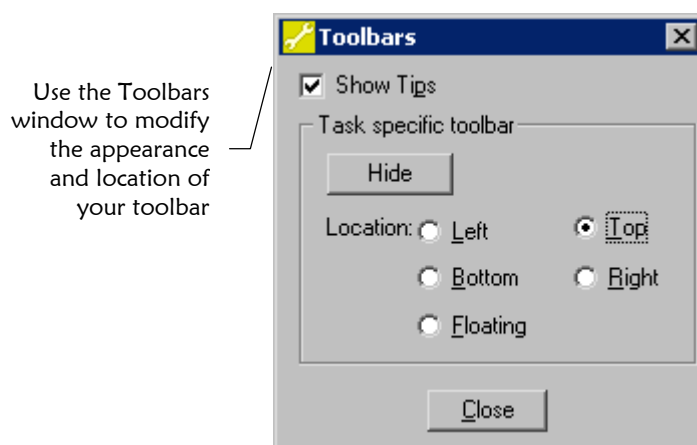
- **Arrange Icons**
  The *Arrange Icons* option arranges the icons at a set interval across the window.

About the Help Menu

The Help Menu allows you to access e*Index Administrator help files and system information including version number, and copyright information.
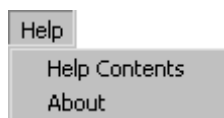
- **Help Contents**
  The *Help Contents* option displays online help to assist you in performing the functions of e*Index Administrator.

- **About**
  The *About* option displays the About information dialog. Click **System Info** on this dialog to display the operating system, CPU type, resolution,

database, database server, e*Index Administrator version and build numbers, and the PowerBuilder version. Click **OK** to close the information dialogs and return to the Main Menu.

About
information
dialog

System
Information
dialog
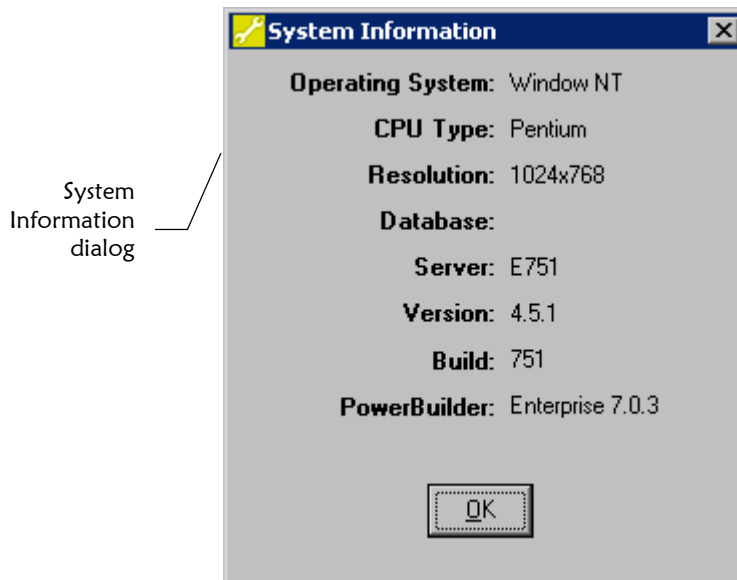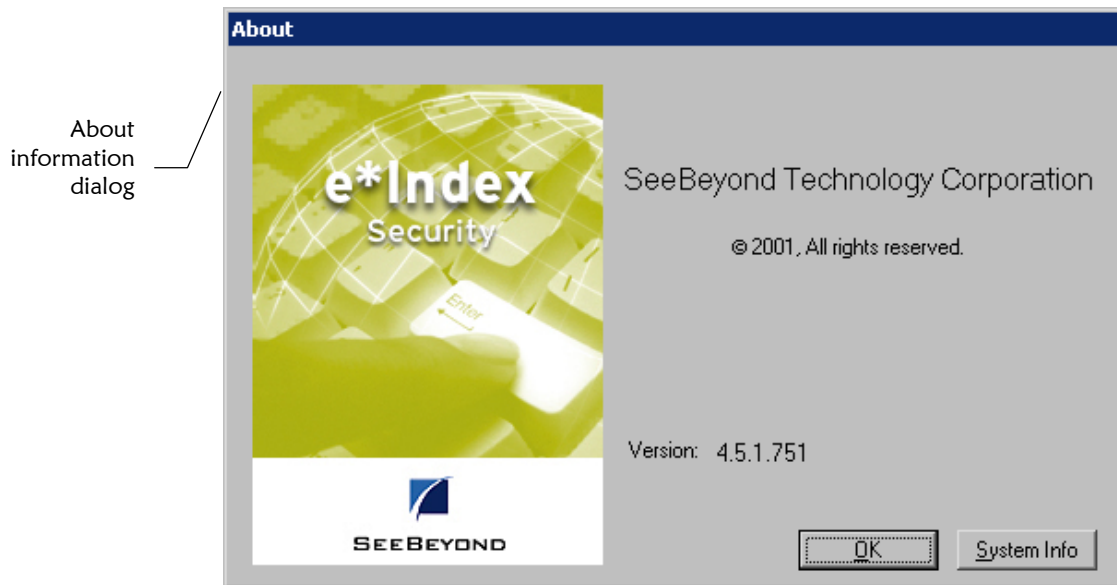
About the Primary Toolbar

The *Primary Toolbar* gives you quick access to the most frequently used e*Index Administrator functions. This toolbar is located just below the Main Menu, and includes a set of buttons, or *tools*, to help you quickly access frequently used functions and modules. Since this toolbar is visible at all times, you can access these tools at any time. Depending on which function you access, another toolbar specific to that function appears under the Primary Toolbar. A description of each icon tool on the Primary Toolbar appears below.
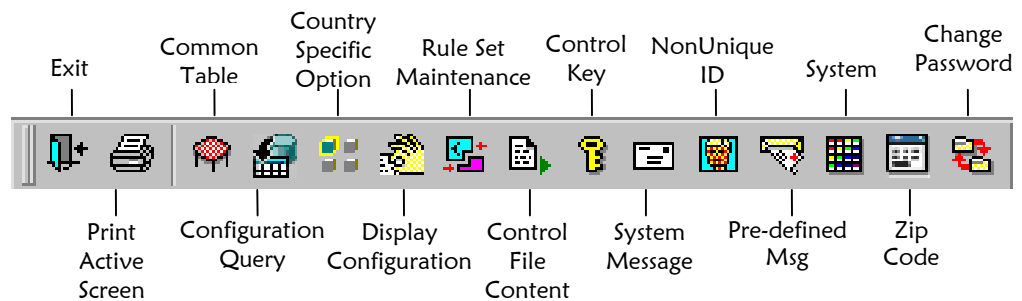
What are Application Windows?

There are numerous *application windows* in e*Index Administrator that you use to perform specific functions. For example, you display the System Maintenance window to add or modify system information. You display the Common Maintenance window to view information about common code tables. Some windows display information in fields, and others display information in rows and columns.

Main Menu bar

Primary toolbar

Application window toolbar

Labeled box

Information is displayed in fields
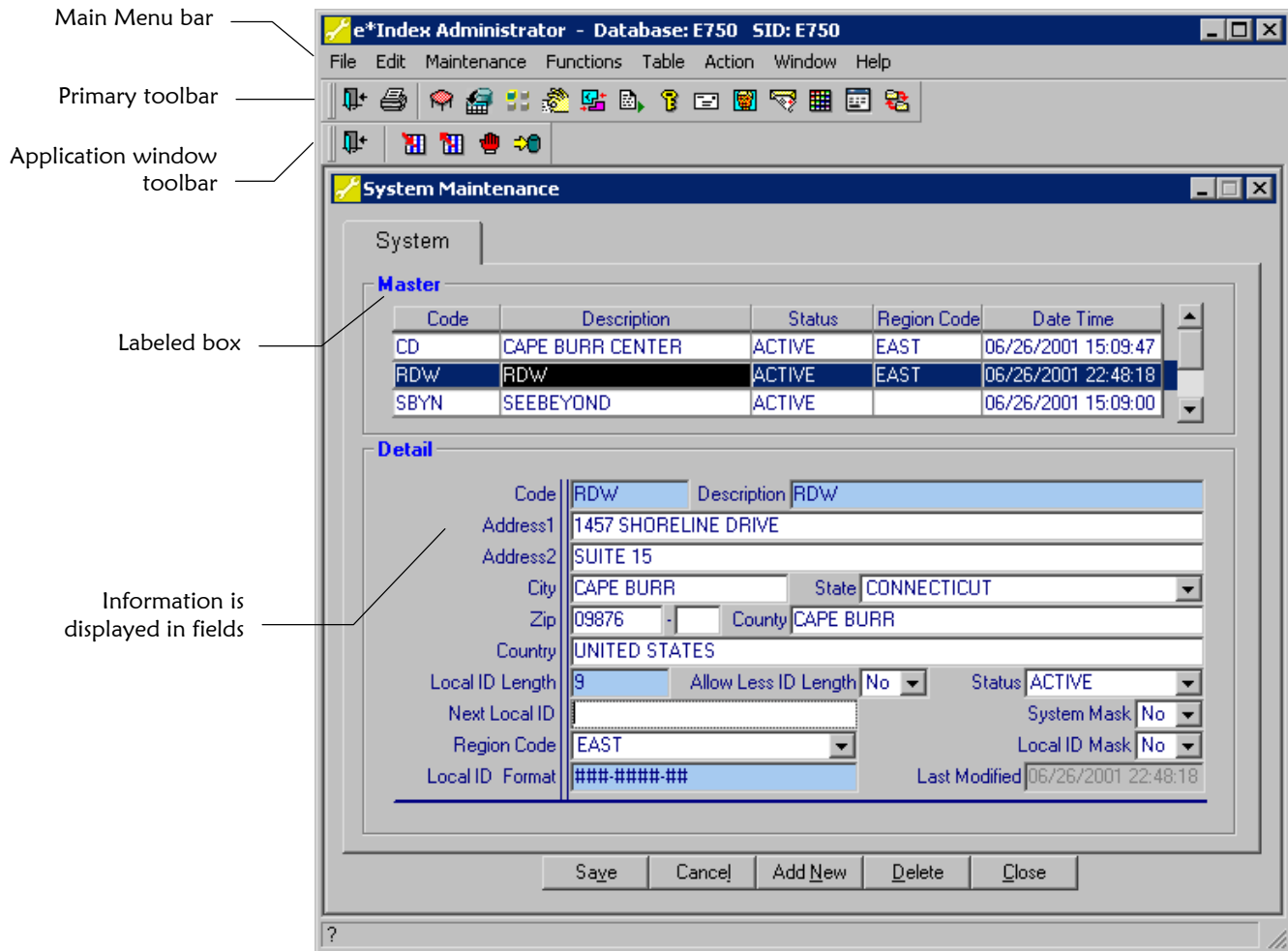
You can perform specific functions on application windows.

Information on this application window is displayed in rows and columns
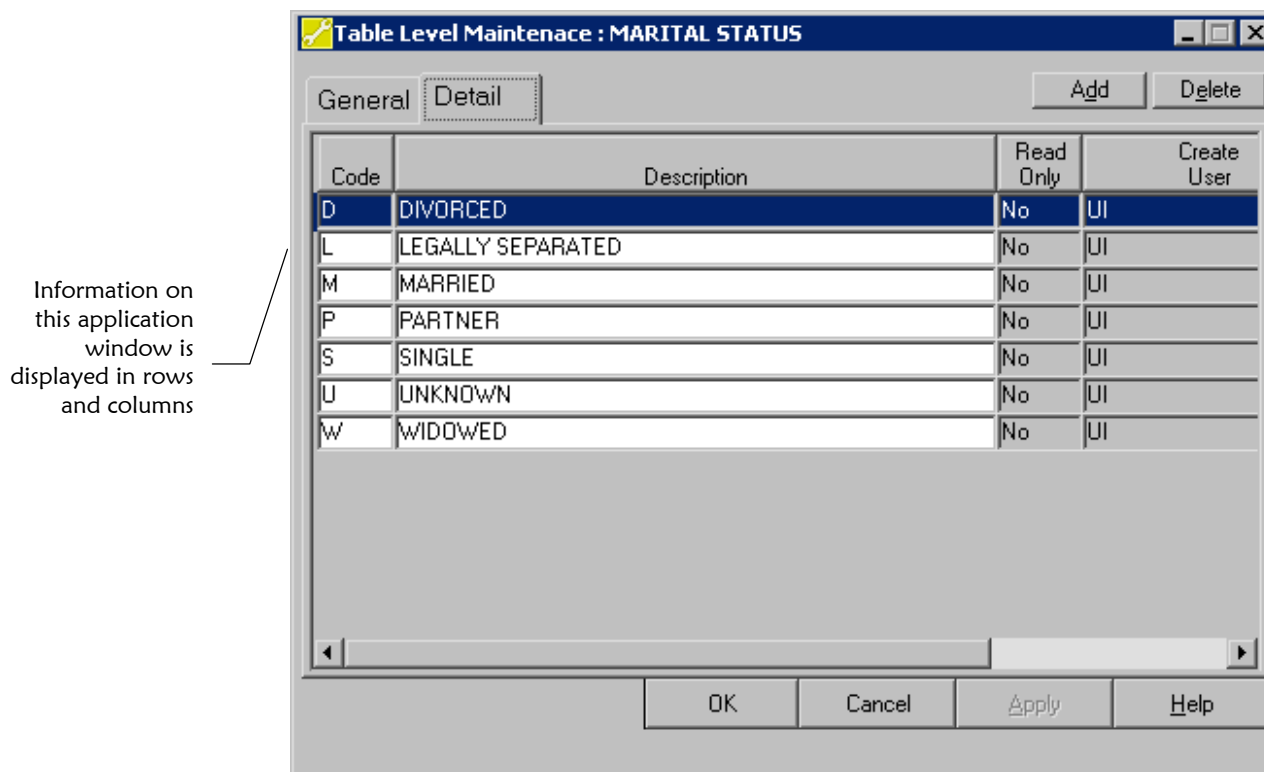
Several components may appear on an application window.

■ **Main Menu**
The Main Menu bar is located at the top of the application window, and is visible in all application windows. This menu bar displays the functions available to e*Index Administrator.

■ **Primary Toolbar**
The Primary Toolbar bar is located just below the Main Menu, and is visible in all application windows. This toolbar displays icons for most of the functions available to e*Index Administrator.

■ **Application window toolbar**
The application window toolbar is unique to each application window, and contains tools for various functions that you can perform from the active application window.

■ **Labeled boxes**
Most application windows contain labeled boxes that display information related to the currently displayed entity. Several application windows contain labeled boxes for different types of information.

About Application Window Menus

Whenever an application window appears, the Main Menu changes slightly to accommodate the functions available on the application window. When you access an e*Index Administrator function, the following menu is added to the menu bar:

■ **Action Menu**
Most Action menus contain a standard set of action commands, such as Save and Print Report, as well as commands that are unique to the displayed window. The Action menu appears on all windows accessed by the Table menu.

Note: On the Common Table Maintenance window, this menu is named ***Options****.*

About Application Window Toolbars

Every application window has a unique toolbar, which is located directly below the primary toolbar. Application window toolbars contain tools for various functions you can perform from the active application window. The tools generally include the functions listed in the Action or Options menu.

Closes window · Print Screen · These functions appear on the window's Actions menu
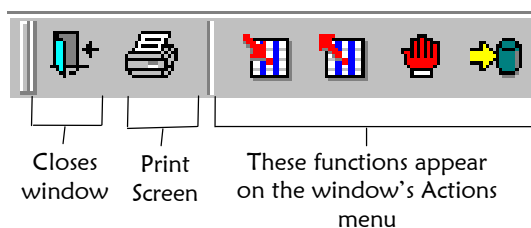
You can easily determine the function of each toolbar button by passing the mouse pointer over a button to view balloon help. Balloon help specifies the function of each button (for more information, see "Using Balloon Help" later in this chapter).

About Fields

Information that you work with in e*Index Administrator is contained in *fields.* There are several different types of fields, and some are automatically populated by e*Index Administrator. The field types are entry, display, and drop-down list. You cannot change or enter information into display fields. You can type information into entry fields and select values from a list in fields with drop-down lists. Any fields that you are required to enter before proceeding are shaded.

You can select a value from a drop-down list, ...

... and you can type into entry fields (if an entry field is shaded, it is a required field).

... but you can only look at values in display fields, ...
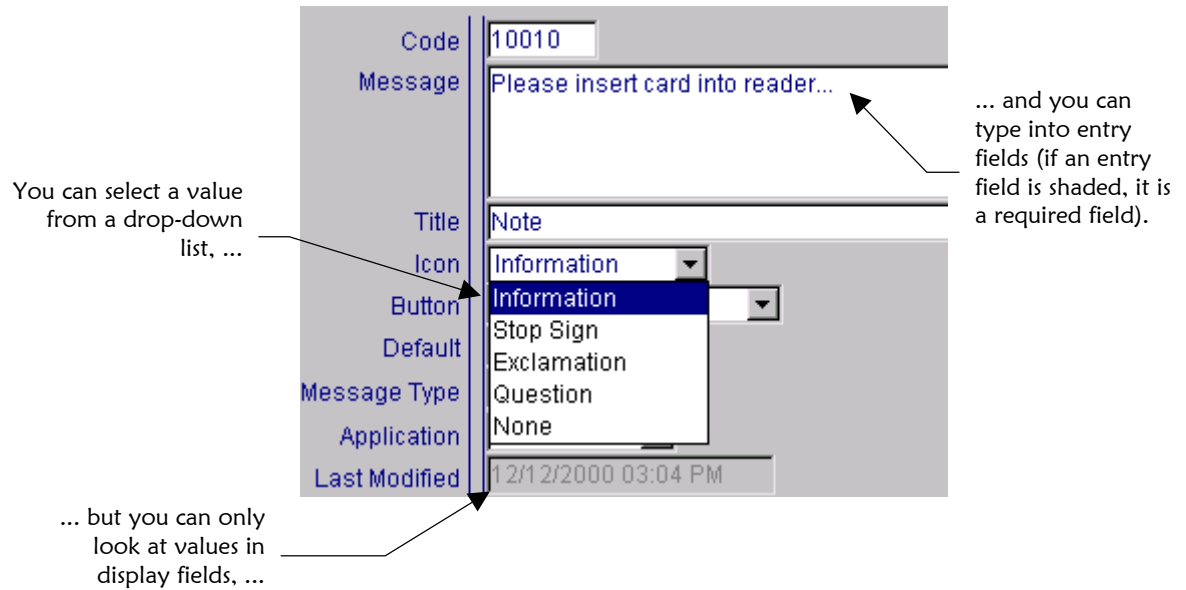
About Drop-Down Lists

Several fields in the e*Index application allow you to select an item from a drop-down list of options. These fields have a down-arrow button on their right side. To fill in these fields, you need to click the down-arrow button and select the appropriate option from the resulting list. You can also enter information in these fields by typing the first letter of the item you want until that item appears. The items contained in the drop-down menus are maintained in the e*Index Administrator.

Select an option from the list to populate the field

Click the down arrow to view a list of options
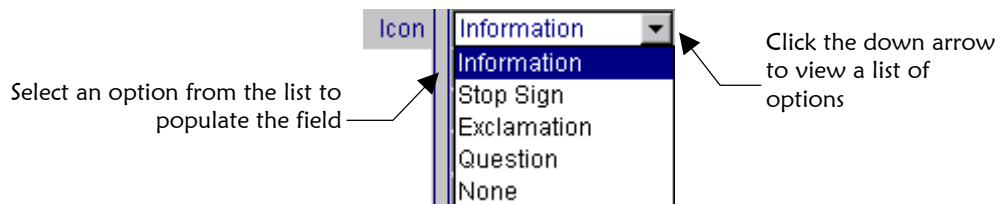
Getting Help

Overview

In e*Index Administrator, there are several types of user assistance tools to help you look up the information you may need to help you perform your tasks. The available user assistance tools include online help, balloon help, and online documentation.

Using Online Help

The online help system provides background information and step-by-step instructions on performing the necessary functions of e*Index Administrator. The help system is provided in HTML format.

Note: Internet Explorer 3.02 or higher is required in order to view online help.

▶ To view online help

1   On the Main Menu, click **Help**, and then click **Help Contents**. The help window appears with the first page displayed.
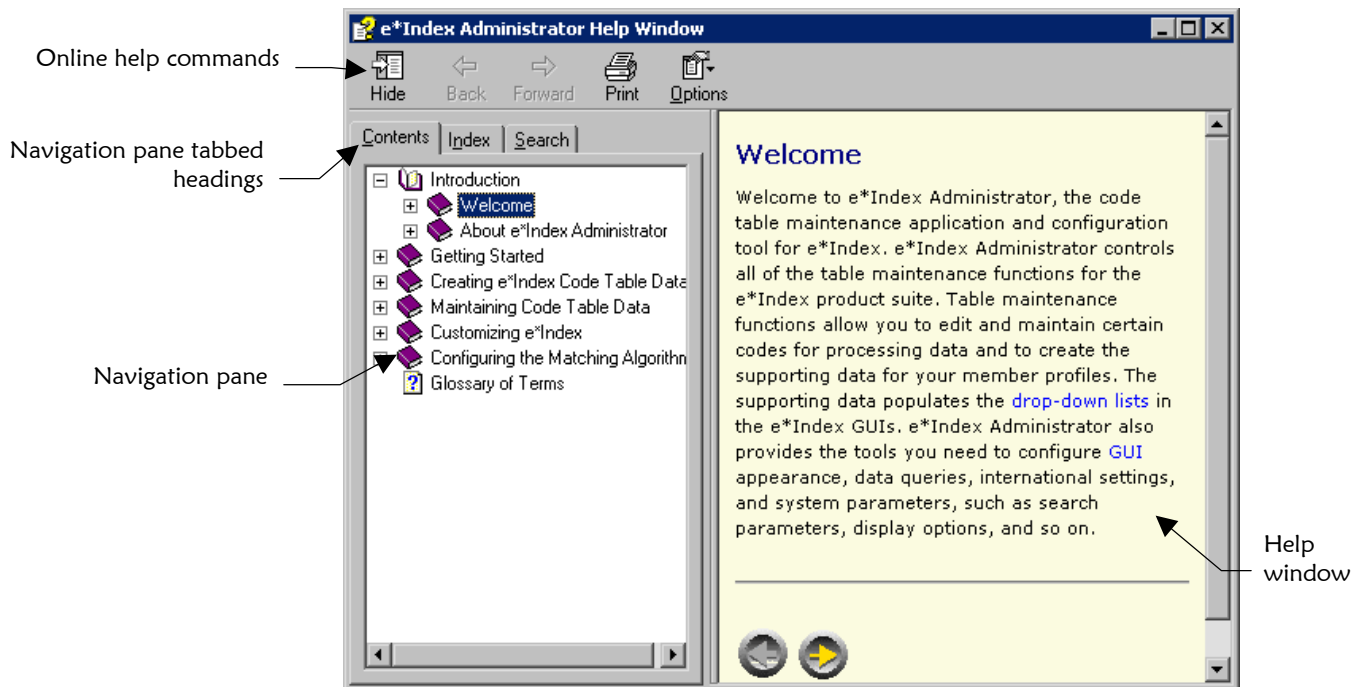
2   Do any of the following:

On the **Contents** tab, expand the topic list until you see the topic you
want to view. Click once on that topic, and the related text
appears in the Help window.

Click the **Index** tab to view an alphabetized list of subjects from
which you can select.

Click the **Search** tab to perform a search for a specific word or phrase.

3   Once you display a topic, you can click on the links to view additional
information.

Tips on using the help system:

■ *Use the **Hide/Show** button at the upper-left corner of this window to hide or
show the navigation pane.*

■ *You can also view the information contained in the online help system from the
documents included in your electronic library (included on your installation
CD).*

Using Balloon Help

You can view a short description of the function that is performed when you
click a specific toolbar button. This description is known as balloon help, and
is available for all of the toolbars on the e*Index Administrator windows.

▶ To view balloon help

■ Place the mouse pointer over a toolbar button, and hold it there for a
second or two without clicking the button. A description of the toolbar
button appears below the button you selected.

Balloon help for the
Common Table icon
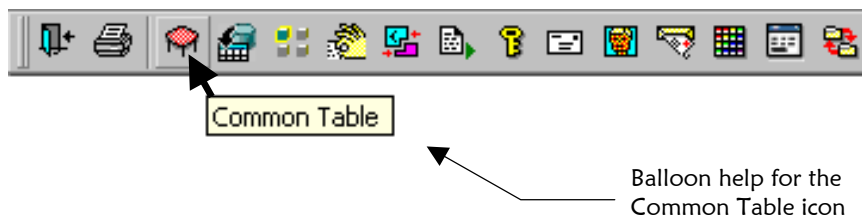
Displaying Online Documentation

SeeBeyond provides online documentation for all e*Index products in an electronic library. The documents are in PDF format, and can be viewed using Adobe® Acrobat® Reader. The e*Index Electronic Library Welcome Document describes all the documents provided in electronic format, provides links to each document, and includes tips on how to use the electronic library.

▶ To display the electronic library welcome document

Before you begin:

✓ Make sure that you have Acrobat Reader installed on your workstation

✓ Make sure that the e*Index documentation is installed on your workstation

1 In Windows Explorer, navigate to your e*Index home directory, open the **docs** directory, and then double-click the file named **Welcome.pdf**.

2 Page through the welcome document using the left and right arrows at the bottom of each page.

▶ To view online documentation

Before you begin:

✓ Open the welcome document from your Windows desktop

1 In the welcome document, scroll to the page that lists the document you wish to view and click on the name of the document. The specified document appears in the Acrobat Reader window.

2 You can return to the Welcome document at any time by clicking on the house icon in the upper left corner of the first page of each document.

Searching Online Documentation

With the Acrobat Reader Search plug-in, you can perform a search for a specific word or phrase across all e*Index PDF documents, or you can limit your search to only the currently open document. The e*Index document index supports the following search options:

- **Match Case**
  Finds words that match the capitalization you specify. For example, if **Match Case** is selected and you search for **Save**, you will find **Save,** but not **save**.

- **Sounds Like**
  Allows for misspellings of proper names. For example, if you search for **grop**, you will find **group** as well as other similar words.

- **Word Stemming**
  Searches for words with common stems. For example, if you specify **manage**, all instances of **manage**, **manager**, and **managed** are found. However, **managing** is not found.

- **Stop Words**
  The following words are not included in the index: **a**, **an**, **and**, **at**, **but**, **for**, **of**, **or**, **the**, **this**, **to**, **you** and **your**. The index does not process searches that contain these words. Also, numbers are excluded from the index.

*Tip: The **Sounds Like** and **Word Stemming** options are not available if you select the **Match Case** option.*

▶ To search for a word or phrase from a document

1 Open the PDF document.

2 Do one of the following:

   To find a word in just the open document, select **Find** from the Edit menu.

   To find a word in any electronic library document, point to **Search** on the Edit menu, and then click **Query**.

3 Enter the word or phrase you want to search for, and click **Find** or **Search**. If you searched only the open document, the first instance of the search criteria appears. If your search included all documents in the electronic library, a list of all documents containing the search criteria appears.

4   Do one of the following:

If you used the Find function, you can press **Ctl+G** to find the next
instance of the word or phrase within the document.

If you used the Search function, you can view your search word or
phrase in one of the documents listed by double-clicking the
document. The document you selected appears with the first
instance of your search criteria highlighted.

▶ **To search for a word or phrase when a document is not
open**

1   Start Acrobat Reader 3.01.

2   On the Edit menu, click **Search**, and then click **Indexes**.

3   If an index named "e*Index" is not listed, click the **Add** button, and
find the file named **UI_index.pdx**. This file is provided in the
directory where the e*Index documentation is installed.

4   Click **Open**, and then click **OK**.

5   On the Tools menu, click **Search**, and then click **Query**.

6   Enter your search criteria, and then click **Search**. A list of documents
containing the specified search criteria appears.

7   Double-click the name of the document you want to view.

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*Tip: For more information on the Find tool, see "Finding Words" in the Reader
Online Guide (select **Acrobat Guide** from the Acrobat Reader Help menu). For
more information on the Search plug-in, see "Searching Catalogue Indexes" in the
Adobe Acrobat 4.0 Guide.*

Exiting e*Index Administrator

Overview

This section of the chapter provides the instructions you will need to log off e*Index Administrator.

Logging Off e*Index Administrator

Before you exit e*Index Administrator, you should first close each open window. There are several methods you can use to log off e*Index Administrator.

▶ To exit e*Index Administrator

Before you begin:

✓ Make sure all application windows are closed

1 Do one of the following:

To exit using the Main menu, click **File**, and then click **Exit.**

To exit using a toolbar button, click the **Exit** tool on the Primary Toolbar.

Exit tool

To exit using a short-cut key, press **Alt+F4**.

Close button

*To exit by closing the e*Index Administrator Main window*, click the **Close** button in the upper right corner of the window.

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

Creating e*Index Code Table Data

About this Chapter

Overview

This chapter presents the background information and the step-by-step instructions you need to understand and set up code table data for e*Index.

The following diagram illustrates the contents of each major topic in this chapter.

About e*Index Code Table Data   Learn about the data you can add to the e*Index code tables

Create Code Table Data   Learn how to create the data elements using the Common Table Maintenance function and the Table Maintenance function
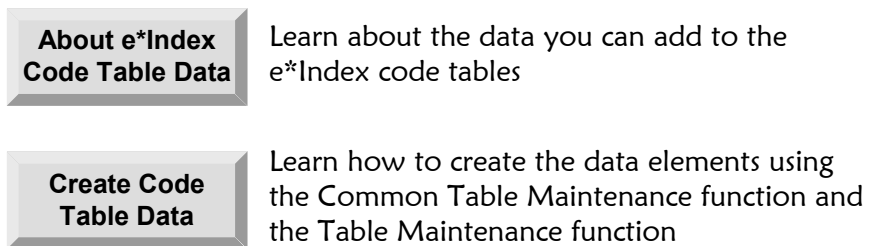
Learning About e*Index Code Table Data

Overview

Before you begin to add e*Index code table data, you should determine the initial set of information you need for your startup database. This information includes the data that populates the drop-down lists of the fields located on the windows of e*Index, and the unique identification codes for each data element.

What is e*Index Code Table Data?

*e*Index code table data* is information used by one or more e*Index windows or processes. You need to customize this data for your business before adding members to your e*Index database. Some of the code table data populates the drop-down lists that your staff uses to enter field values quickly and consistently. Other e*Index code table data, such as member statuses, direct various aspects of processing. You can tailor code table data to suit your business needs. Code table data that you need to create prior to adding members to your database include company computer systems, person categories, non-unique ID types, and so on.

The code tables are maintained by two different functions in e*Index Administrator, Common Table Maintenance and Table Maintenance. Common tables store standard data elements that require only a unique identification code and description. The custom tables (found under Table Maintenance) store data elements that require more detailed information. The custom and common tables are described in the following sections.

What are the Common Table Data Elements?

The Common Table function allows you to create default information that users can use to populate the fields in a member profile. Many common table data elements are predefined when you install the database, and most of this information can be modified or deleted as required. To add common table data, you only need to supply a unique identification code and a description. All of the data elements in the Common Table Maintenance function are stored in the database table *stc_common_detail*.

*Note: The fields on the e*Index GUI that are affected by the data you create in the common tables are configurable. This means that these fields may or may not be visible on the e*Index GUI and that the field name on the GUI may differ from the common table name, depending on how the field labels are configured in the Configuration Maintenance function.*

The types of entities you can add in the common tables include:

Address Type

The Address Type Common Table Maintenance function allows you to add the different types of addresses used by the members in your database, such as home, business, billing, and so on. Some address types are automatically populated when you install the e*Index database. You can add new address types, and modify or delete information about existing address types as needed. The address type codes are used to populate the drop-down lists for the **Address Type** fields on the e*Index GUI.

Citizenship

Using the Citizenship Common Table Maintenance function, you can add citizenship information to your database. Citizenship information is not populated when you install your e*Index database. The citizenship information you define is used to populate the drop-down lists for the **Citizenship** fields on the e*Index GUI. You can add, modify, or delete information about citizenships as needed.

Country Code

Using the Country Code Common Table Maintenance function, you can add country information to your database. Standard country codes and descriptions are automatically populated when you install the e*Index database. Country codes are used to populate the drop-down lists for the **Country** fields on the e*Index GUI. You can add, modify, or delete information about countries as needed.

Department

The Department Common Table Maintenance function allows you to define the various departments that make up your business organization. Departments should be defined in the manner that best suits your current organization, and could include human resources, administration, and so on. Department information is not predefined in the e*Index database. The departments you create are displayed in the drop-down lists for the **Department** fields on the e*Index GUI.

District of Residence (DOR)

The District of Residence Common Table Maintenance function allows you to define the districts in which the members in the database reside. This function is primarily for international installations of e*Index. District of Residence information is not predefined in the database. The districts that you create are displayed in the drop-down lists for the **District of Residence** fields on the e*Index GUI.

Driver License Issuer

The Driver License Issuer Common Table Maintenance function allows you to define the various organizations that issue driver licenses for the members in the database. Driver license issuers are not predefined in the database. The issuers that you create in the database are displayed in the drop-down lists for the **Driver License Issuer** fields on the e*Index GUI.

Ethnic

You can use the Ethnic Common Table Maintenance function to define the various ethnicities of the members who participate throughout your business. The ethnicities you add to your database should be determined by the ethnic makeup of your member population. Some ethnicities are predefined in the database, which you can modify or delete. You can also add new ethnicities as required. The ethnicities you define appear in the drop-down lists for the **Ethnic** fields on the e*Index GUI.

Event

The Event Common Table Maintenance function allows you to define the different types of transactions that can be performed against member profiles. Event types include actions such as merge, add, update, deactivate, and so on. Event information is predefined in the e*Index database, and the predefined codes are used for processing data. Event codes are automatically included in the audit trail for each profile and are added to outbound messages based on the processing code assigned to each event. You cannot modify the predefined event types. e*Index Administrator provides the ability to add, modify, or delete new event types, but event types you add are not be used by e*Index.

Event Notification

e*Index Security allows you to assign event notifications to e*Index users. This means that when a specific transaction occurs in the e*Index GUI, all users to whom that event type is assigned receive an e-mail notification of the transaction. The Event Notification Common Table Maintenance function allows you to modify the different types of transactions that can trigger an e-mail notification. The predefined event notification types include actions such as merge, add, update, deactivate, and unmerge. e*Index Administrator provides the ability to add new items to the event notification list, but the items you add are not used by e*Index for processing. The descriptions you create appear on the e*Index Security Event Notify window.

Gender

Use the Gender Common Table Maintenance function to define the different genders of the members in your organization. Gender information is automatically populated when you install the e*Index

database, and you can add, modify, and delete information as needed. The defined genders appear in the drop-down lists for the **Gender** fields on the e*Index GUI.

Language

Using the Language Common Table Maintenance function, you can define the different languages that are spoken by the members in your organization. Language information is automatically populated when you install the e*Index database. You can modify and delete this information, and add new language information, as necessary. The languages you define appear in the drop-down lists for the **Language** fields on the e*Index GUI.

Marital Status

Use the Marital Status Common Table Maintenance function to define the marital statuses that you can choose when you create member profiles. Some marital statuses are automatically defined when you create the e*Index database, and you can delete or modify this information and add new marital statuses as needed. The marital statuses that are defined appear in the drop-down lists for the **Marital Status** fields on the e*Index GUI.

Nationality

Use the Nationality Common Table Maintenance function to define the various nationalities of the members in your organization. Nationalities are not predefined in the e*Index database. You can add, delete, or modify nationality information to suit your business requirements. The nationalities you define appear in the drop-down lists for the **Nationality** fields on the e*Index GUI.

Person Category

The Person Category Common Table Maintenance function allows you to define the different types of members who participate throughout your business. For example, your database may contain both patients and physicians; or it may contain both employees and customers. By assigning each member to a Person Category, you can organize your member profiles into separate groups. The categories you enter appear in the drop-down list in the **Person Category** field on the e*Index windows. One person category, **Person**, is predefined and cannot be modified or deleted.

Phone Type

The Phone Type Common Table Maintenance function allows you to add the different types of telephone numbers used by the members in your database, such as home, fax, cellular, and so on. Some telephone types

are automatically populated when you install the e*Index database. You can add new telephone types, and modify or delete information about existing telephone types as needed. The telephone type codes are used to populate the drop-down lists for the **Phone Type** fields on the e*Index GUI.

Race

Using the Race Common Table Maintenance function, you can specify information about the racial makeup of the members who participate throughout your organization. Race information is automatically populated when you install the e*Index database. You can modify, and delete this information and add new information as necessary. The races you define appear in the drop-down lists for the **Race** fields on the e*Index GUI.

Region Code

Using the Region Code Common Table Maintenance function, you can specify information about the regions associated with each external system from which member data originates. You only need to define regions if you have region-specific security installed in the database (for more information, see "About Region-specific Security" later in this chapter). Region-specific security allows you to restrict user access by the region in which each system is located. In order for region-specific security to be functional, you must associate each system (defined in the System Maintenance function) with one of the regions you define here.

Religion

Use the Religion Common Table Maintenance function to define the different religions and religious denominations of the members participating in your organization. Some religious information is pre-populated when you install your e*Index database. You may need to customize this information to suit the requirements of your business. The religions you define appear in the drop-down lists for the **Religion** fields on the e*Index GUI.

Source

Using the Source Common Table Maintenance function, you can specify information about the different computer information systems that generate member transactions in your organization. For example, you can define the software applications used to register member information in this maintenance function. Information about sources is not predefined in the e*Index database.

Note: Some of the entities you add in Source Maintenance may duplicate the entities you add in System Maintenance.

State Code

Use the State Code Common Table Maintenance function to define the different states in which members reside. State codes are automatically populated when you install your e*Index database. You can modify or delete this information or add new information as needed. The defined states appear in the drop-down lists for the **State** fields on the e*Index GUI.

Status

Each member in the database has a status, such as merged, active, inactive, and so on. Status codes are automatically populated when you install the e*Index database. Using the Status Common Table Maintenance function, you can define new statuses, and delete or modify the statuses you define. However, the new statuses are not used by e*Index for processing transactions. You cannot delete the predefined statuses, which are assigned to each member profile based on certain transactions that occur against each profile. For example, when two potential duplicate profiles are merged, the 'merge from' record receives a status code of **M** (for "merged") to indicate it is no longer active. If a profile is deactivated, it receives a status code of **D** (for "deactivated").

Suffix

Using the Suffix Maintenance function you can create and modify standard suffixes to member names from which your staff can select when adding member profiles. Suffixes you may want to create include Jr., 3rd, LVN, III, and so on. The suffixes you create appear on the drop-down lists for the **Suffix** fields on the e*Index GUI.

Title

With the Title Common Table Maintenance function, you can define titles for your member population. Some title information is predefined in the e*Index database, and you can modify and delete this information. You can also add new titles as needed. The titles you define populate the drop-down menus that are used to fill in the **Title** fields on the e*Index GUI. Examples of titles you may want to add include Doctor, Reverend, Sister, Senator, and so on.

Veteran Status

Using the Veteran Status Common Table Maintenance function, you can define codes for the veteran statuses of the members that participate throughout your organization. Veteran statuses can be as simple as Yes, No, and Unknown. This information populates the drop-down lists that are used to fill in the **Veteran Status** fields on the e*Index GUI

VIP Flag

You can define VIP flags for the members in your organization using the VIP Flag Common Table Maintenance function. A member's VIP flag may determine whether certain information is masked for that member on the e*Index windows. Certain predefined values, such as VIP and Employee, can not be deleted, since they control the field-masking capabilities. The VIP codes "V" (for VIP) and "E" (for Employee) indicate that certain fields are masked for member profiles assigned those VIP flags. The flags you define appear on the e*Index windows in the **R/Access** fields.

What are the Custom Table Data Elements?

The Table Maintenance functions allow you to create default information that users can use to populate the fields in a member profile. Some information is predefined when you install the database, and most of this information can be modified or deleted as required. The data elements in the custom tables are similar to those in the common tables, but require more detailed information. Each data element type in the Table Maintenance functions is stored in a different database table.

*Note: The fields on the e*Index GUI that are affected by the data you create in the custom tables are configurable. This means that these fields may or may not be visible on the e*Index GUI and that the field name on the GUI may differ from the common table name, depending on how the field labels are configured in the Configuration Maintenance function.*

The types of entities you can add in the custom tables include:

System Messages

The System Message Maintenance function allows you to modify the message dialogs that appear in the e*Index GUIs. Messages can be up to 500 characters in length and you can specify the action buttons to display on the message dialog. You can also choose from five different icons for each message dialog. Default messages are included with e*Index and customization is not necessary in most cases. e*Index Administrator provides the ability to add new messages, but they cannot be displayed from the e*Index GUIs. Information about system messages is stored in the table *ui_message*.

Non-Unique ID Types

Use the Non-unique ID Definition Maintenance function to define the types of identification codes used by your organization that are not unique for each user. Non-unique ID and type pairs are similar to local ID and system pairs, except local IDs and system pairs must be unique within the database. The ID types you define are stored in the

ui_aux_id_def table. Non-unique ID types are not predefined when the database is installed. You can add, delete, and modify non-unique ID type information using this maintenance function.

Predefined Message

With the Predefined Message Maintenance function, you can create messages that your staff can insert into member profiles as comments. You can create any message you wish, each up to 80 characters long. Predefined messages are optional, and are not required in order to perform the functions of e*Index. Predefined messages are stored in the table *ui_canned_msg*. Users can select the messages you predefine on the Comments window and the Comments page of the View/Edit Person window in e*Index.

System

Use the System Maintenance function to define various computer systems within your company at which member information is entered. Systems include computer applications through which member information is created or modified, and they assign a unique identifier for each member record. Systems must be added to the database before you can add member profiles in the e*Index GUI. When you specify system information you can specify the name, address, a local ID length and format for each system, and whether to mask system or local ID information. Information about each system is stored in the table *ui_facility*, and the systems you define appear in the drop-down lists for the **System** fields on the e*Index GUI.

Zip Code

The *ui_zip* table is populated with zip code information when you install your e*Index database. The information specified in this table allows e*Index users to enter a zip code into the **Zip** field, which then automatically populates the **City** and **State** fields with default values. You can use the Zip Code Maintenance function to add, modify, or delete zip code information.

About Region-specific Security

Region-specific security allows the security administrator to specify the regions for which users can view and modify information in the e*Index GUI. With region-specific security, each system that provides information to e*Index is associated with a region. In order for an e*Index user to access information from a specific system, their user profile must be associated with the region assigned to that system (this is done in e*Index Security). Before e*Index users can be associated with a region, the regions and systems must be defined in e*Index Administrator, and each system must be associated with a region.

e*Index Code Table Data

Overview

Before you process any information with e*Index, you need to tailor the initial processing data to your business needs. The following steps are involved in this process.

- Step 1: Identify Code Table Requirements
- Step 2: Define Common Table Data Elements
- Step 3: Define Non-unique ID Types
- Step 4: Create Predefined Messages
- Step 5: Define Systems
- Step 6: Define Zip Codes

Tip: *You can perform these steps in any order you choose; however, if you are using region-specific security, you should define regions in Common Table Maintenance before you define systems.*

Step 1: Identify e*Index Code Table Requirements

Before you begin to add code table data to the e*Index database, you should research and identify the information that you need to customize. Review the information under "What are the Common Table Data Elements?" and "What are the Custom Table Data Elements?" earlier in this chapter to determine the entities you need to add to the code tables for e*Index. Remember that you will be required to create a unique identification code for the entities that you add to these tables.

Step 2: Define Common Table Data Elements

Some of the common data table fields are populated with predefined data elements when you install the e*Index database. You can add data elements of any of the following types: Address Type, Citizenship, Country Code, Department, District of Residence, Driver License Issuer, Ethnic, Event, Event Notification, Gender, Language, Marital Status, Nationality, Person Category, Phone Type, Race, Region Code, Religion, Source, State Code, Status, Title, Veteran Status, and VIP Flag.

Use the Table Level Maintenance windows to add common table data elements

▶ To define common table data elements

Before you begin:

✓ Complete "Step 1: Identify e*Index Code Table Requirements"

✓ Obtain information about the data elements you need to define, such as their names and unique identification codes

Common Table tool

1 On the Primary Toolbar, click **Common Table**. The Common Table Maintenance window appears.

The Common Table Maintenance windows lists each available common table

2 On the left side of the Common Table Maintenance window, double-click **eIndex** to view a list of Common Tables, and then highlight the name of the common table to which you want to add data elements. For example, to add new person categories, highlight Person Category.

Properties tool

3 On the Common Table Maintenance toolbar, click **Properties**. The Table Level Maintenance window for the common table you selected appears with the General tab displayed (for more information about the fields on this window, see "About Common Table General Fields" following this procedure).

The General page on
the Table Level
Maintenance windows
displays general
information about the
common tables

4 On the Table Level Maintenance window, select the Detail tab. The Detail page appears with a list of existing data elements.

Add tool

5 On the Common Table Maintenance toolbar, click **Add**. A new row appears at the bottom of the data element list.

6 In the new row, enter identifying information for the new data element (for more information, see "About Common Table Detail Fields" following this procedure).

7 Do one of the following:

Apply button

To continue adding data elements to the displayed common table, click **Apply** and then repeat steps 5 through 7 for each data element you add.

OK button

To save the changes to the database and close the displayed common table maintenance window, click **OK**. The new information is added to the database, and the Table Level Maintenance window closes, returning to the Common Table Maintenance window.

8 Continue to "Step 3: Create Non-unique ID Types."

Maintenance Tips — Common Table Information

Once you have added a data element to a common table, you can modify information about that element as needed, or you can delete the element.

To change information about an existing common table data element: see "Modifying Common Table Data Elements" in Chapter 4 of this guide.

To delete an existing common table data element: see "Deleting Common Table Data Elements" in Chapter 4 of this guide.

About Common Table General Fields

The fields located on the General Page of the Table Level Maintenance windows display information about the common table you are viewing.

This field …	displays this information …
Code	The unique identification code of the common table you are viewing.
Description	A description of the common table you are viewing.
Maximum Width	The maximum number of characters allowed in the code column for the data elements in the common table you are viewing.
Create Date	The date that the common table you are viewing was created.
Create User	The login ID of the user who created the common table you are viewing.

About Common Table Detail Fields

The fields located on the Detail page of the Table Level Maintenance windows allow you to specify identifying information about the specific data element you are adding.

In this column …	type or select …
Code	A unique identification code for the data element you are adding.
	No default
Description	The full name of the data element you are adding.
	No default

This column …	displays this information …
Read Only	An indicator of whether you can modify the description of the data element or delete the data element. A value of **No** in this field means the data element can be

This column …	displays this information …
	modified; a value of **Yes** means that it cannot.
	Default: **No** (the data element can be modified)
Create User	The login ID of the user who created the common table data element.
Create Date	The date that the data element was created in the displayed common table.

Step 3: Create Non-unique ID Types

The Non-unique ID Maintenance function allows you to define the various types of IDs that are not unique to each member in your organization. To define an ID type, you need to specify certain information, such as a name, ID length, and ID format.

Use the Non-unique ID Definition Maintenance window to add new ID types
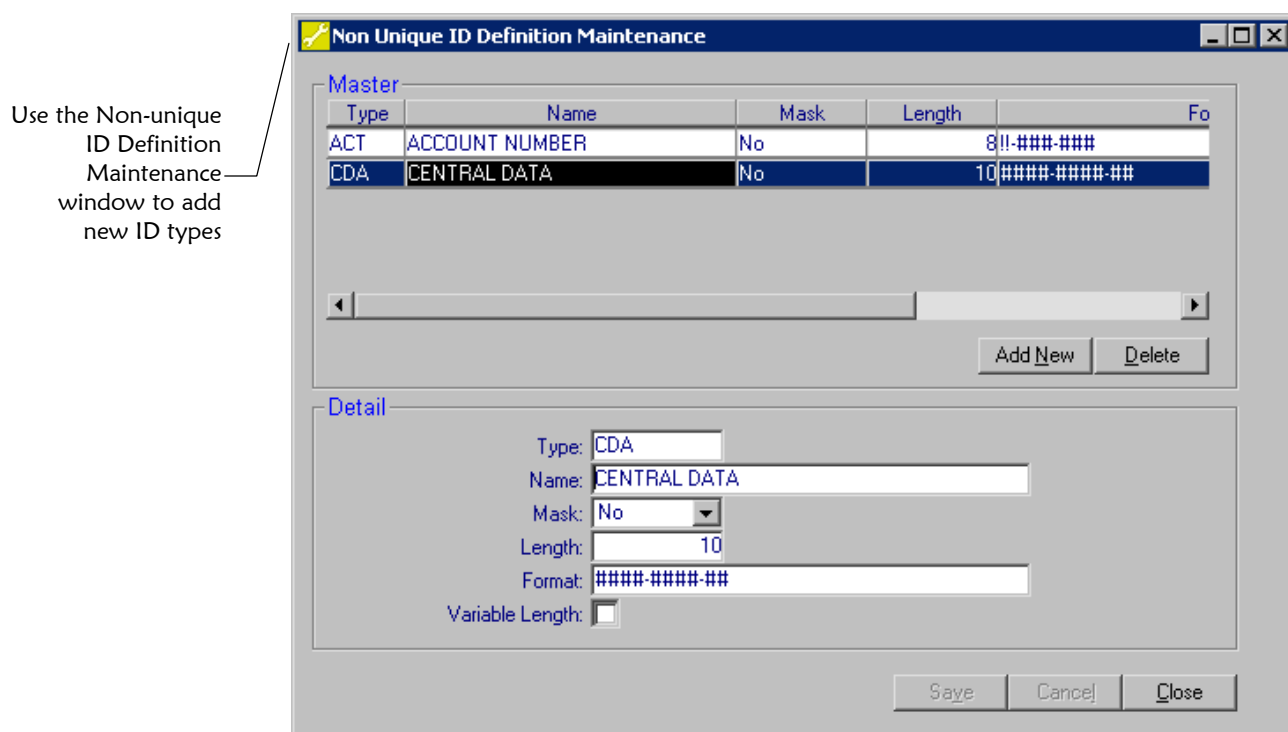
▶ **To create a non-unique ID type**

Before you begin:

✓ Complete "Step 2: Define Common Table Data Elements"

✓ Obtain information about the ID type, such as a description and the unique identification code you want to use
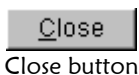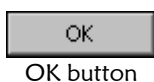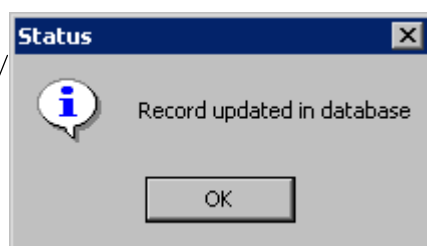
NonUnique IDs
tool

1   On the Primary Toolbar, click **NonUnique IDs**. The Non Unique ID Definition Maintenance window appears.

Add New tool

2   On the Non Unique ID Definition Maintenance toolbar, click **Add New**. A new row appears in the upper portion of the window, and the fields in the lower portion of the window are cleared.

3   In the lower portion of the Non Unique ID Definition Maintenance window, fill in identifying information about the ID type (for more information, see "About Non-unique ID Type Fields" following this procedure).

Save tool

4   After you fill in the fields, click **Save**. The Add Confirmation dialog appears.

Add
Confirmation
dialog

Status   [×]

ℹ   Record updated in database

OK

OK button

5   On the Add Confirmation dialog, click **OK**. The new item is saved in the database.

6   Do one of the following:

To insert additional non-unique IDs, repeat steps 2 through 5.

Close button

To close the Non Unique ID Definition Maintenance window, click **Close**.

7   Continue to "Step 4: Create Predefined Messages."

Maintenance Tips — Non-unique ID Type Information

Once you create a non-unique ID type, you can modify information about the type as needed, or you can delete the type.

To change information about an existing non-unique ID type: see "Modifying Non-unique IDs" in Chapter 4 of this guide.

To delete an existing non-unique ID type: see "Deleting Non-unique IDs" in Chapter 4 of this guide.

About Non-unique ID Type Fields

The fields located on the Non Unique ID Definition Maintenance window allow you to specify identifying information about the ID type you are adding. There are no defaults for these fields.

In this field …	type or select …
Type	A unique identifier for the ID type.
Name	A brief description of the ID type, such as the name of the computer system from which the identification codes originate.
Mask	This field must be filled in, but is not currently active. It is reserved for future functionality.
Length	The length of the identification codes for this ID type. Do not include hyphens or other characters in the count.
Format	The manner in which the ID for the displayed ID type should be presented. The format is expressed by symbols separated by dashes. For example, if the IDs of this type appear in this format **123-456-789**, then you would enter **###-###-###** in this field to ensure that the IDs are presented correctly on the e*Index windows. The symbols you can use for the format are as follows: • **A** – Indicates that alphanumeric characters are allowed. • **!** – Indicates that only upper case alphanumeric characters are allowed. • **#** – Indicates that only numeric characters are allowed. • **X** – Indicates that any character type is allowed.

Select this option …	to specify that …
Variable Length	e*Index users can specify a non-unique ID for the displayed non-unique ID type that is fewer characters than that specified in the **Length** field. If this option is not selected, then users must enter an ID of the length specified.

Step 4: Create Predefined Messages

You can create predefined messages that users can add to member profiles in the form of comments. To create a predefined message, you need to specify certain information, such as the text of the message and its unique identification code.

Use the Pre-defined Msg Maintenance window to add new predefined messages

▶ To create a predefined message

Before you begin:

✓ Complete "Step 3: Create Non-unique ID Types"

✓ Obtain information about the message, such as the message text and the unique identification code you want to use

Pre-defined Message tool

1 On the Primary Toolbar, click **Pre-defined Message**. The Pre-defined Msg Maintenance window appears.

Add New tool

2 On the Pre-defined Msg Maintenance toolbar, click **Add New**. A new row appears in the upper portion of the window, and the fields in the lower portion of the window are cleared.

3 In the lower portion of the Pre-defined Msg Maintenance window, fill in identifying information (for more information, see "About Predefined Message Fields" following this procedure).

Save tool

4 After you fill in the fields, click **Save**. The Add Confirmation dialog appears.

Add Confirmation dialog

**Status**

Record updated in database

OK
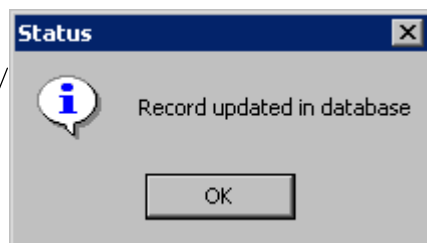
OK button

5 On the Add Confirmation dialog, click **OK**. The new item is saved in the database.

6 Do one of the following:

To insert additional Predefined messages, repeat steps 2 through 5.

Close button

To close the Pre-defined Msg Maintenance window, click **Close**.
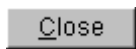
7 Continue to "Step 5: Define Systems."

Maintenance Tips — Predefined Message Information

Once you add a predefined message, you can modify information about the message as needed, or you can delete the message.

To change information about an existing message: see "Modifying Predefined Messages" in Chapter 4 of this guide.

To delete an existing message: see "Deleting Predefined Messages" in Chapter 4 of this guide.

About Predefined Message Fields

The fields located on the Pre-defined Msg Maintenance window allow you to specify identifying information about the message you are adding. There are no defaults for these fields.

In this field …	type or select …
Key	A unique identification code for the predefined message. This field corresponds to the **Msg Code** table in the upper portion of the window.
Description	The full text of the predefined message.

This field or column …	**displays this information …**
Msg Code	The unique identification code for the message. This field corresponds to the **Key** field in the lower portion of the window.

This field or column …	**displays this information …**
Date Time and **Last Modified**	The date that the message information was last updated.

Step 5: Define Systems

Before you can add members to your database, you need to define the systems in which member information is entered in your organization. To define a system, you need to specify certain information such as the system name and ID.

Use the System
Maintenance
window to add
new systems

▶ **To define a system**

Before you begin:

✓ Complete "Step 4: Create Predefined Messages"

✓ Obtain information about the system, such as the name of the system, the unique identification code for the system, and the format of the system's local ID

System tool

1 On the Primary Toolbar, click **System**. The System Maintenance window appears.

Add New tool

2 On the System Maintenance toolbar, click **Add New**. A new row appears in the upper portion of the window, and the fields in the lower portion of the window are cleared.

3 In the lower portion of the System Maintenance window, fill in identifying information for the system (for more information, see "About System Fields" following this procedure).

Save tool

4 After you fill in the fields, click **Save**. The Add Confirmation dialog appears.

Add Confirmation dialog

Status

Record updated in database

OK

OK button
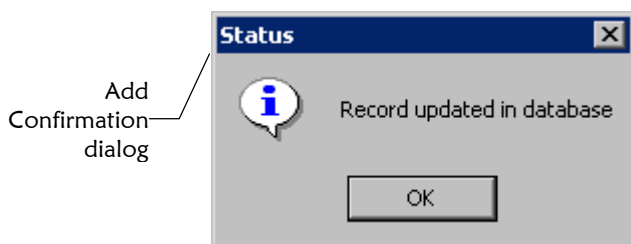
5 On the Add Confirmation dialog, click **OK**. The new item is saved in the database.

6 Do one of the following:

To insert additional systems, repeat steps 2 through 5.

Close button

To close the System Maintenance window, click **Close**.
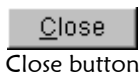
7 Continue to "Step 6: Define Zip Codes."

Maintenance Tips — System Information

Once you add a system to e*Index, you can modify information about the system as needed, or you can delete the system.

To change information about an existing system: see "Modifying System Information" in Chapter 4 of this guide.

To hide a system's local ID in member profiles: see "Masking System Information" in Chapter 4 of this guide.

To hide a system's name in member profiles: see "Masking System Information" in Chapter 4 of this guide.

To deactivate a system: see "Deactivating a System" in Chapter 4 of this guide.

To reactivate a system: see "Reactivating a Deactivated System" in Chapter 4 of this guide.

To delete an existing system: see "Deleting System Information" in Chapter 4 of this guide.

About System Fields

The fields located on the System Maintenance window allow you to specify identifying information about the system you are adding.

---

*Tip: On the e*Index GUI, the order in which a member's local ID and facility pairs are listed is determined by the value you specify for the County field on the System Maintenance window. e*Index lists the local IDs and systems alphanumerically based on the value in the County field. If you want local IDs and systems listed in a specific order, use the County field to define the list order.*

In this field …	type or select …
Code	A unique identification code for the system.
	No default
Description	The full name of the system.
	No default
Address1 and **Address2**	The first and second lines of the street address where the system is located.
	No default
City, **State**, and **Zip**	The city, state, and zip code in which the system is located.
	No default
County	The county in which the system is located.
	No default
Country	The country in which the system is located.
	No default
Local ID Length	The length of the unique identification number assigned to each member by this system (does not include dashes).
	No default
Allow Less ID Length	An indicator that specifies whether a local ID with fewer characters than specified in **Local ID Length** can be entered. Select **Y** to allow fewer characters for a local ID, or select **N** to ensure that all local IDs entered for this system have the number of characters specified.
	Default: **No**
	*Note: If you leave this field blank, then you cannot enter local IDs with fewer characters than specified in **Local ID Length**.*

In this field …	type or select …
Status	An indicator that specifies whether the system is active. Select **Active** to indicate that the system is currently active, or select **Inactive** to indicate that the system is not currently active.
	Default: **Active**
Next Local ID	This field is reserved for possible future functionality.
	No default
System Mask	An indicator that specifies whether the system name for the members whose information is added at this system is hidden when member profiles are viewed. Select **Yes** to hide the system name, or select **No** to display the system name.
	Default: **No**
Region Code	The region with which the system is associated. You only need to enter a value in this field if region-specific security is installed.
	No default
Local ID Mask	An indicator that specifies whether the local IDs for the members whose information is added at this system is hidden when member profiles are viewed. Select **Yes** to hide local IDs, or select **No** to display local IDs.
	Default: **No**
Local ID Format	The manner in which the local ID for the system should be presented, expressed by symbols separated by dashes. For example, if a system formats its local IDs in this format **123-456-789**, then you would enter **###-###-###** in this field to ensure that the local ID was presented correctly on the e*Index windows. You can use the following symbols in the local ID format. • **A** – Indicates that alphanumeric characters are allowed. • **!** – Indicates that only upper case alphanumeric characters are allowed. • **#** – Indicates that only numeric characters are allowed. • **X** – Indicates that any character type is allowed. There is no default for this field.

This field or column …	displays this information …
Date Time and **Last Modified**	The date that the system information was last updated.

Step 6: Define Zip Codes

When you installed your database, the zip code table was automatically populated, unless otherwise specified. You can define additional zip codes if required. To define a zip code, you need to specify certain information, such as the zip code and corresponding city and state. You can customize the field labels on this window for international installations to display post code information instead of zip code information (see "Configuring Display Options" in Chapter 4 of this guide).

Use the Zip Code Maintenance window to add new zip codes

▶ To define a zip code

Before you begin:

- ✓ Complete "Step 5: Define Systems"

- ✓ Obtain information about the zip codes you want to insert, such as the city and state associated with the zip code

Zip Code tool

1 On the Main Menu, click **Zip Code**. The Zip Code Maintenance window appears with the Search page displayed.

Search for zip codes and cities on the Zip Code Search page
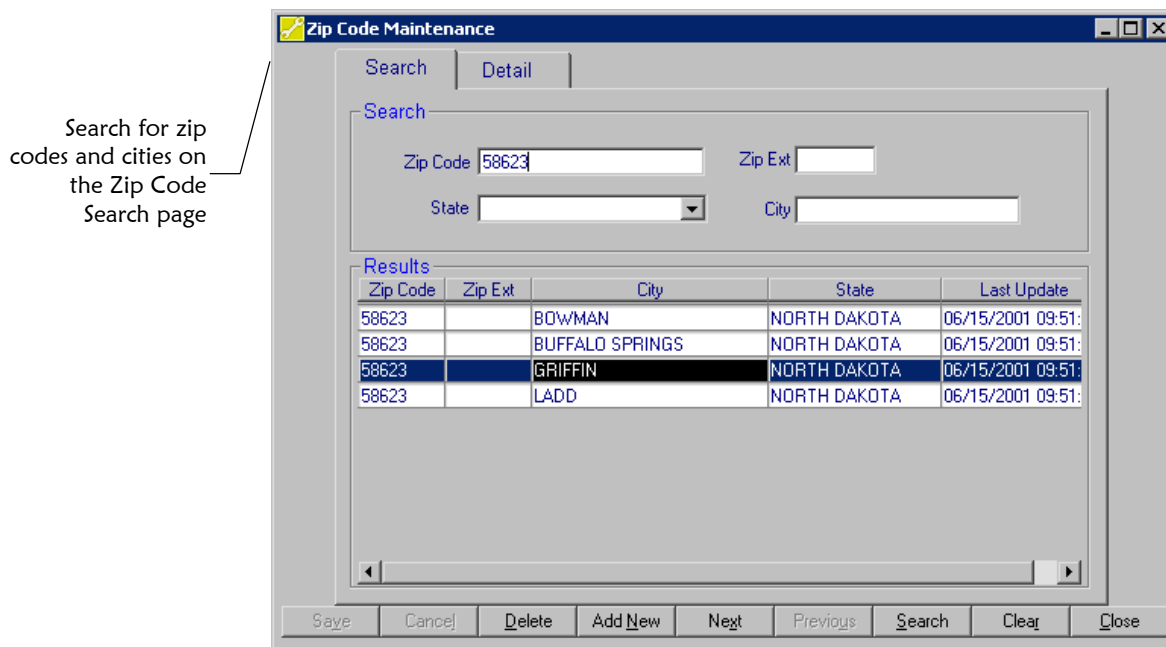
Add New tool

2 On the Zip Code Maintenance toolbar, click **Add New**. The Detail page appears.

3 On the Detail page, fill in identifying information (for more information, see "About Zip Code Fields" following this procedure).

Save tool

4 After you fill in the fields, click **Save**. The Add Confirmation dialog appears.

Add Confirmation dialog

OK button

5 On the Add Confirmation dialog, click **OK**. The new item is saved in the database.

6 Do one of the following:

Close button
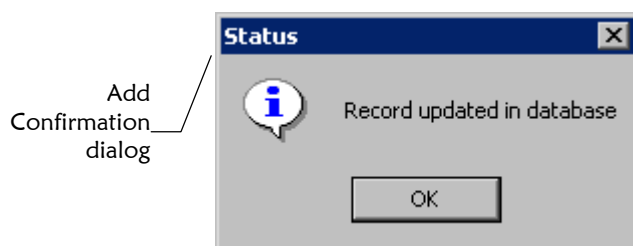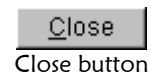
To insert additional zip codes, repeat steps 2 through 5.

To close the Zip Code Maintenance window, click **Close**.

Maintenance Tips — Zip Code Information

Once a zip code is added to the database, you can modify information about the zip code as needed, or you can delete the zip code.

To change information about an existing zip code: see "Modifying Zip Codes" in Chapter 4 of this guide.

To delete an existing zip code: see "Deleting a Zip Code" in Chapter 4 of this guide.

About Zip Code Fields

The fields located on the Zip Code Detail window allow you to specify identifying information about the Zip Code you are adding. There are no defaults for these fields.

In this field …	type or select …
Zip Code	The unique zip code for the specified city.
Zip Ext	The extension to the zip code, if any.
City	The city for which you are specifying a zip code.
State	The state in which the city is located.
County	The county in which the city is located.
Residence Code	The residence code for the specified city (this field is only valid for New Jersey locations).

This field or column …	displays this information …
Last Modified	The date that the zip code information was last updated.

Maintaining Code Table Data

About this Chapter

Overview

This chapter presents the background information and the step-by-step instructions you need to maintain code table data for e*Index.

The following diagram illustrates the contents of each major topic in this chapter.
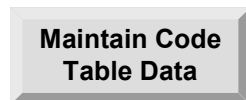
About Maintenance Tasks	Learn about the tasks you can perform to maintain code table data for e*Index
Maintain Code Table Data	Learn how to perform maintenance tasks to keep code table data current

Learning about Maintenance and Configuration Tasks

Overview

There are several tasks you can perform in order to maintain code table data. This section of the chapter provides the background information you need in order to maintain your code table data and to configure e*Index system parameters.

What is Code Table Maintenance?

Once you add data to the code tables of e*Index, you can add new information, and modify or delete most of the existing information to keep it current. Maintenance tasks include formatting local IDs, masking system information, modifying and deleting code table data, and deactivating systems. You can also modify the text and appearance of most of the system message boxes that appear in the e*Index applications. The Common Table and Table Maintenance functions of e*Index Administrator provide the code table maintenance functions.

What are System Name and Local ID Masking?

In the interest of member privacy, you may need the ability to hide a system's name or the local IDs assigned by that system on the e*Index windows. System name and local ID masking provides the ability to hide this information for the members who are registered with that system. When a system's name and local IDs are masked, then a series of asterisks appears on the e*Index windows in place of the system name and local ID.

What Code Data Can be Modified?

Once you add code table data, you can modify most of the information as needed. You cannot modify the codes you assign to the data elements you add to the code tables, but you can modify any description you add and most of the descriptions for the data that is automatically populated when you install e*Index. You cannot modify any information about predefined events and member statuses, the predefined Person Category **Person**, or about the predefined VIP Flags **VIP** and **Employee**. When you modify code table data, be aware of any data elements that may be affected. For example, if you modify regions, then the changes appear on the System Maintenance window and in the user profiles to which the region is assigned.

What Code Data Can be Deleted?

You can delete any of the code table data you add to e*Index, and some of the data that is predefined. You cannot delete the predefined events and member statuses, or the predefined Person Category **Person**, or about the predefined VIP Flags **VIP** and **Employee**. Use caution when deleting code table information because this action may affect existing information. For example, if you delete region codes, you need to assign new regions to systems that were assigned the deleted region code. You also need to reassign regions to user profiles in e*Index Security. e*Index Administrator validates most of the custom code table data for dependencies when you try to delete it, and does not allow you to delete a data element that does not pass the validation.

Modifying Code Table Data

Overview

This section of the chapter provides step-by-step instructions to help you maintain the both custom and common code table data in your database. It includes generic instructions for modifying and deleting common code table data.

Data maintenance functions include:

- Modify common table data elements
- Delete common table data elements
- Modify System Messages
- Modify Non-unique ID Types
- Delete Non-unique ID Types
- Modify Predefined Messages
- Delete Predefined Messages
- Modify System Information
- Delete System Information
- Specify a System's Local ID Format
- Mask System Information
- Assign a System to a New Region
- Deactivate a System
- Reactivate a Deactivated System
- Modify Zip Codes
- Delete a Zip Code

Modifying Common Table Data Elements

Once you define code table data for the common tables, you can modify most of the information as necessary. To modify common table data, you need to display the information you want to modify on the appropriate common table maintenance window.
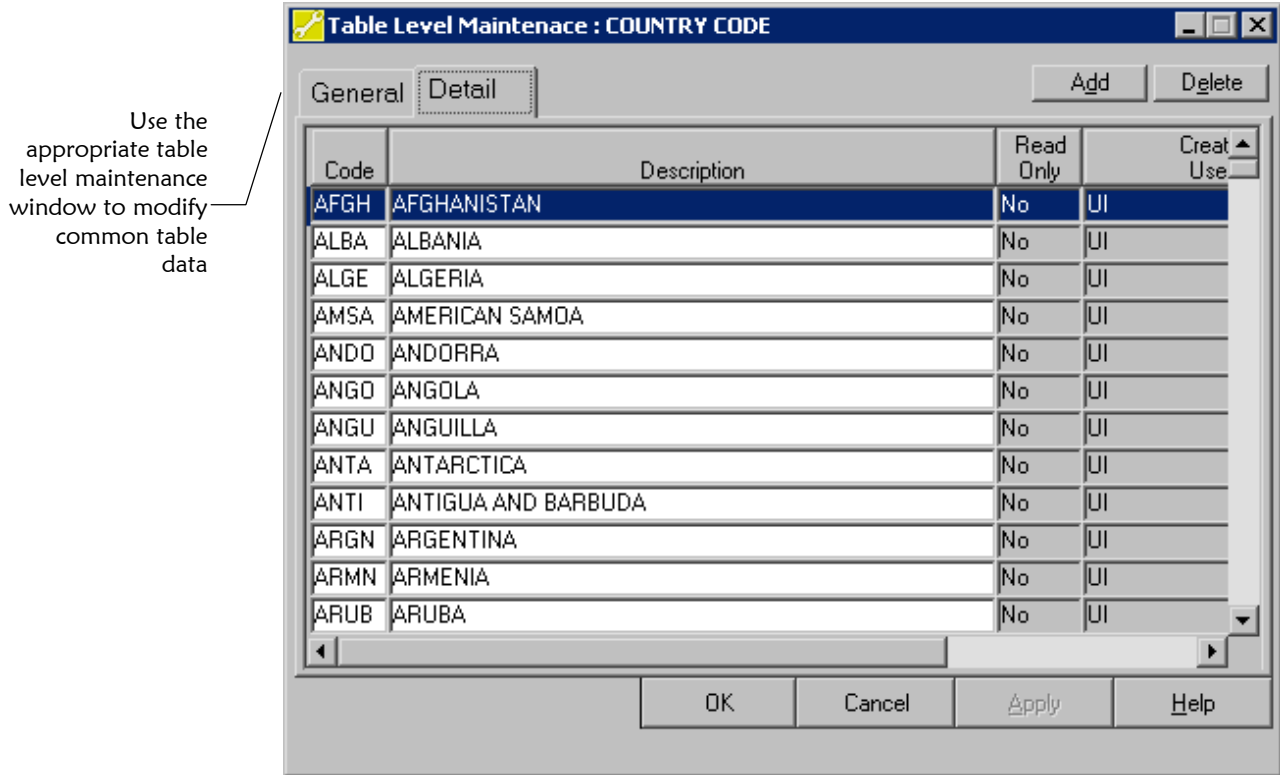
Use the appropriate table level maintenance window to modify common table data

Code	Description	Read Only	Creat Use
AFGH	AFGHANISTAN	No	UI
ALBA	ALBANIA	No	UI
ALGE	ALGERIA	No	UI
AMSA	AMERICAN SAMOA	No	UI
ANDO	ANDORRA	No	UI
ANGO	ANGOLA	No	UI
ANGU	ANGUILLA	No	UI
ANTA	ANTARCTICA	No	UI
ANTI	ANTIGUA AND BARBUDA	No	UI
ARGN	ARGENTINA	No	UI
ARMN	ARMENIA	No	UI
ARUB	ARUBA	No	UI

Table Level Maintenace : COUNTRY CODE — General / Detail — Add / Delete — OK / Cancel / Apply / Help

▶ **To modify common table data elements**

Before you begin:
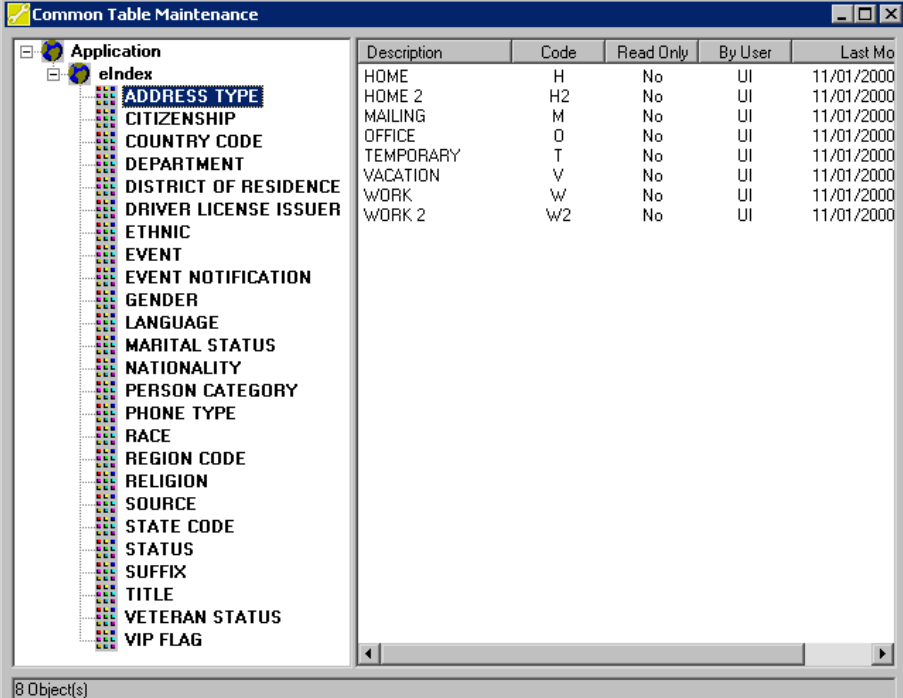
✓ Obtain information about the data element you want to modify, such as its name and unique identification code

✓ If necessary, review the information provided in "What Code Data Can be Deleted?" earlier in this chapter

Common Table tool

1 On the Primary Toolbar, click **Common Table**. The Common Table Maintenance window appears.

The Common
Table Maintenance
window lists all
available common
tables

2   On the left side of the Common Table Maintenance window, double-click **eIndex** to view a list of Common Tables, and then highlight the name of the common table containing the data elements you want to modify. For example, to modify a person category, highlight Person Category.

Properties tool

3   On the Common Table Maintenance toolbar, click **Properties**. The Table Level Maintenance window appropriate to the common table you selected appears with the General tab displayed (for more information about the fields on this window, see "About Common Table General Fields" in Chapter 3 of this guide).

The General tab of the Table Level Maintenance windows displays information about the selected common table
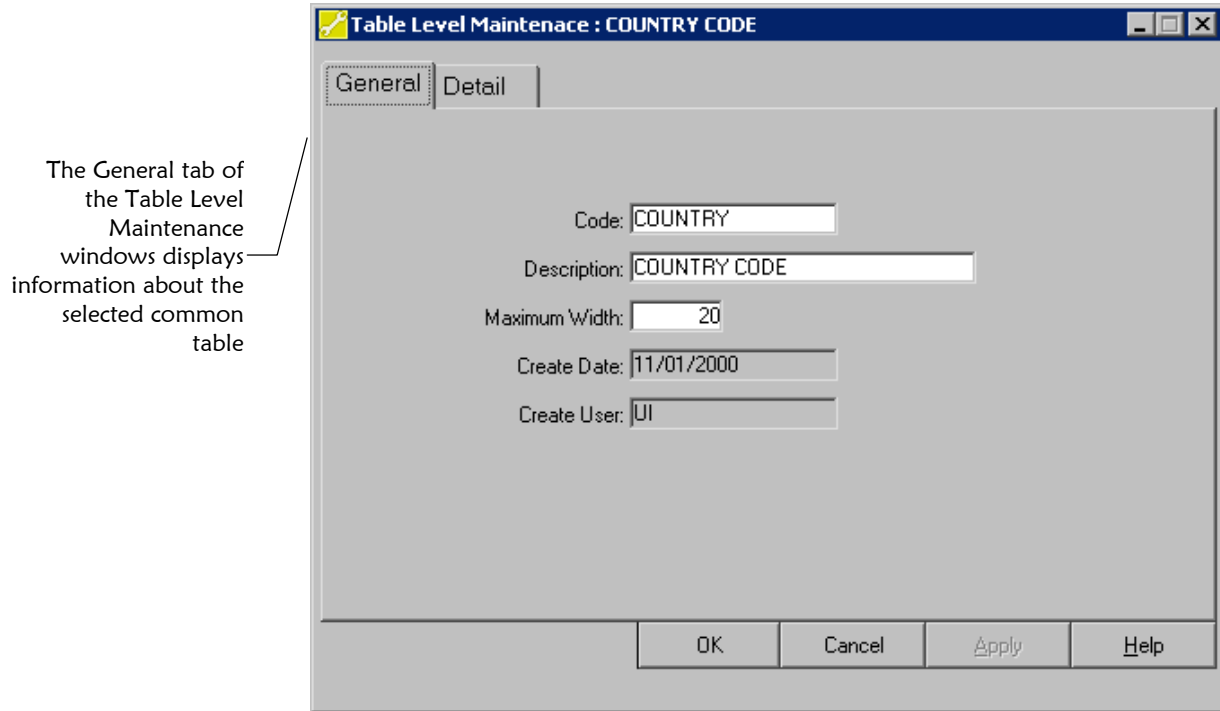
4 On the Table Level Maintenance window, select the Detail tab. The Detail page appears with a list of existing data elements.

5 On the Detail page, scroll to the row containing the data element you want to modify.

6 Modify the appropriate column (for more information, see "About Common Table Detail Fields" in Chapter 3 of this guide).

7 Do one of the following:

Apply button

To save the changes and continue modifying data elements in the displayed common table, click **Apply** and then repeat steps 5 through 7 for each data element you modify.

OK button
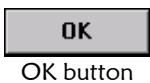
To save the changes and close the displayed common table window, click **OK**. The new information is added to the database, and the Table Level Maintenance window closes, returning to the Common Table Maintenance window.

Deleting Common Table Data Elements

Once you have defined common table data, you can delete most of the data elements as needed. To delete common table data, you need to display the data elements you want to delete on the appropriate common table maintenance window.
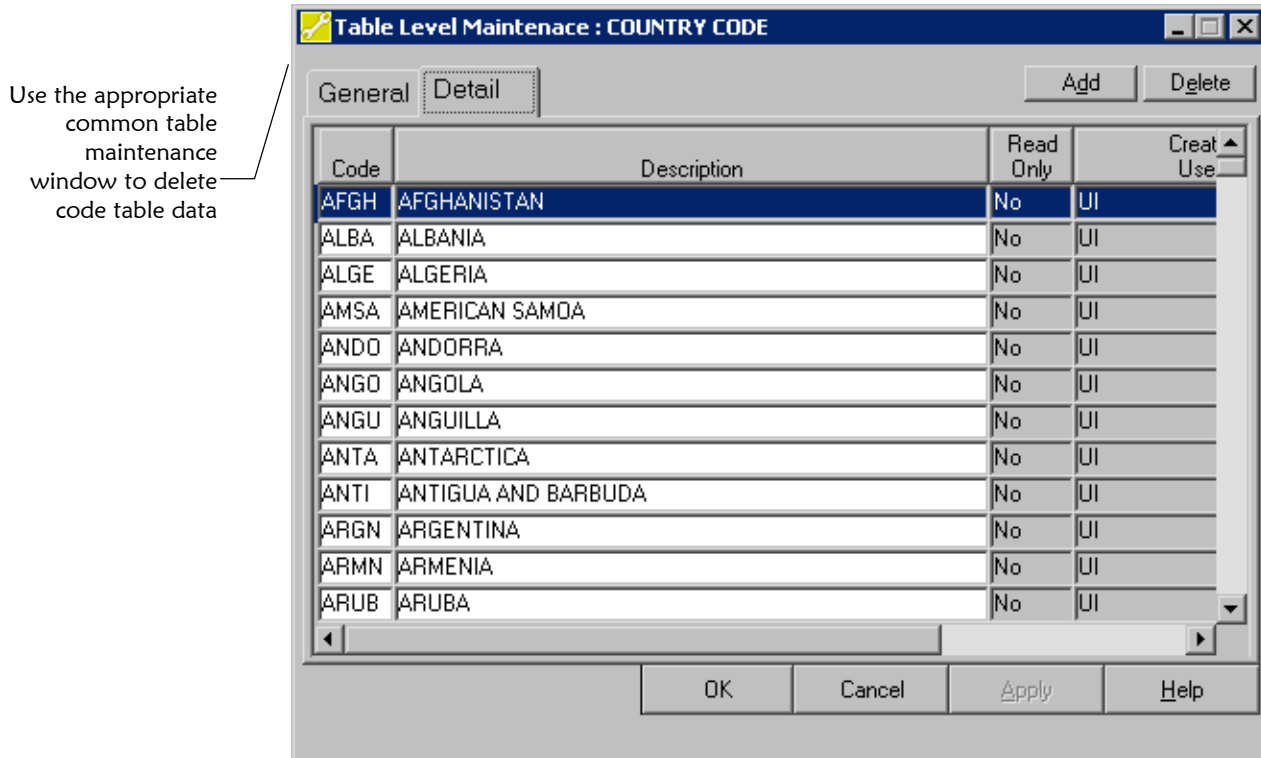
Use the appropriate common table maintenance window to delete code table data

	Table Level Maintenace : COUNTRY CODE				_ □ ×
General	Detail			Add	Delete
Code	Description		Read Only	Creat ▲ Use
AFGH	AFGHANISTAN		No	UI
ALBA	ALBANIA		No	UI
ALGE	ALGERIA		No	UI
AMSA	AMERICAN SAMOA		No	UI
ANDO	ANDORRA		No	UI
ANGO	ANGOLA		No	UI
ANGU	ANGUILLA		No	UI
ANTA	ANTARCTICA		No	UI
ANTI	ANTIGUA AND BARBUDA		No	UI
ARGN	ARGENTINA		No	UI
ARMN	ARMENIA		No	UI
ARUB	ARUBA		No	UI

OK   Cancel   Apply   Help

▶ **To delete common table data elements**

Before you begin:

✓ Obtain information about the data elements you want to delete, such as their names and unique identification codes

✓ If necessary, review the information provided in "What Code Data Can be Deleted?" earlier in this chapter

Common Table tool

1 On the Primary Toolbar, click **Common Table**. The Common Table Maintenance window appears.

The Common Table
Maintenance window
displays a list of
common tables
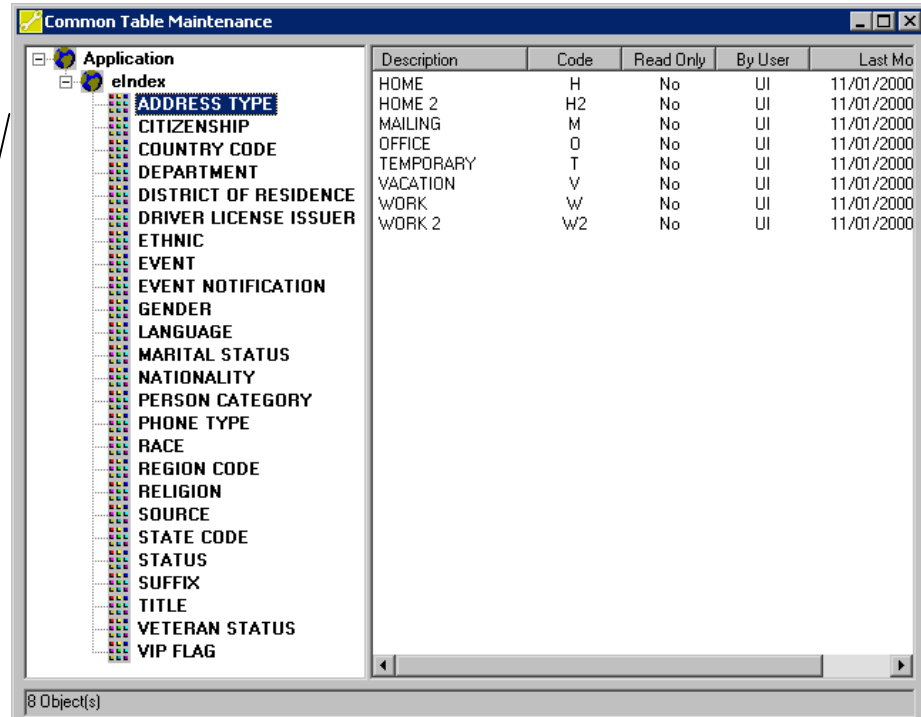
2 On the left side of the Common Table Maintenance window, double-click **eIndex** to view a list of Common Tables, and then highlight the name of the common table containing the data elements you want to delete. For example, to delete a person category, highlight Person Category.

3 On the Common Table Maintenance toolbar, click **Properties**. The Table Level Maintenance window appropriate to the common table you selected appears with the General tab displayed (for more information about the fields on this window, see "About Common Table General Fields" in Chapter 3 of this guide).

Properties button

The General tab of the Table Level Maintenance windows displays information about the selected common table

> **Table Level Maintenace : COUNTRY CODE**
>
> General   Detail
>
> Code: COUNTRY
>
> Description: COUNTRY CODE
>
> Maximum Width: 20
>
> Create Date: 11/01/2000
>
> Create User: UI
>
> OK   Cancel   Apply   Help
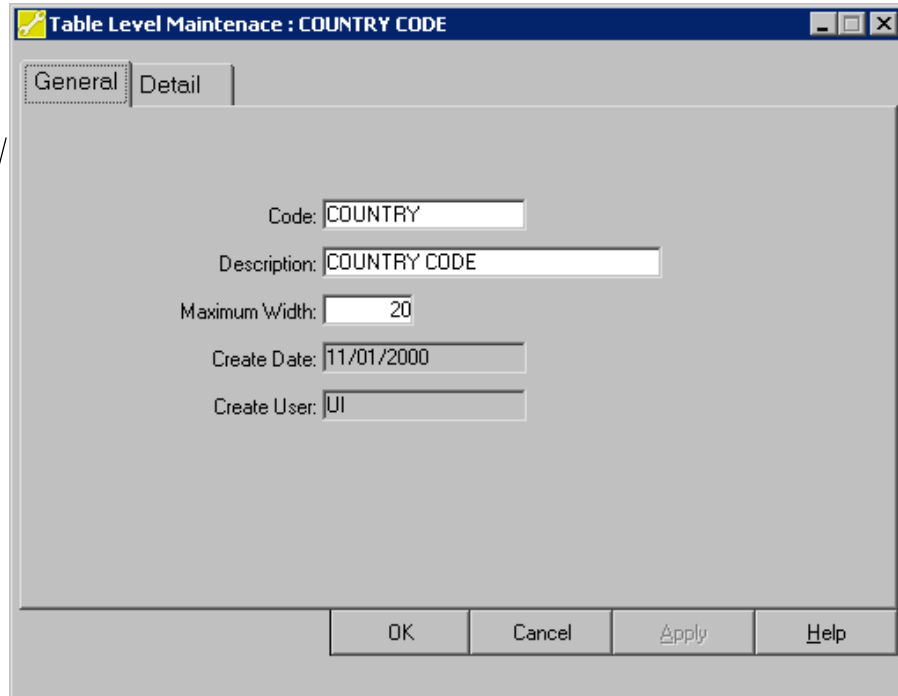
4 On the Table Level Maintenance window, select the Detail tab. The Detail page appears with a list of existing data elements.

5 On the Detail page, scroll to the row containing the data element you want to delete.

Delete tool

6 Highlight the row you want to remove, and click **Delete** on the Common Table Maintenance toolbar. A warning message appears.

Deletion warning message

> **Warning**
>
> ? The COUNTRY CODE detail code may be referenced in other tables. Deleting this record may result in data inconsistency. Are you sure to delete ?
>
> Yes   No
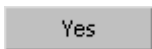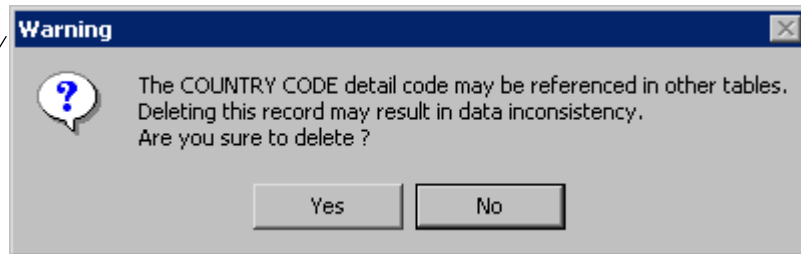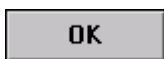
Yes button

7 On the warning dialog, click **Yes** to continue with the deletion of the selected data element.

OK button

8 When you finish deleting data elements from the displayed common table, click **OK**.

Modifying System Messages

You can modify information about the system messages that appear in dialog boxes on the e*Index GUIs. To modify a system message you need to display the System Message Maintenance window.

---

*Note: e*Index Administrator provides the ability to add new system messages, however the new messages will not appear on the e*Index GUIs. You can also change the buttons that appear on message boxes, but that will have no affect on processing.*

Use the System Message Maintenance window to modify system messages

▶ To modify a system message

Before you begin:

✓ Obtain information about the message, such as information in the message and its unique identification code

System Message tool

1 On the Primary Toolbar, click **System Message**. The System Message Maintenance window appears.

2 In the upper portion of the System Message Maintenance window, select the system you want to modify.

3 In the lower portion of the window, modify any open field (for more information, see "About System Message Maintenance Fields" following this procedure).

Save tool

4   On the System Message Maintenance toolbar, click **Save**. The Update Confirmation dialog appears.
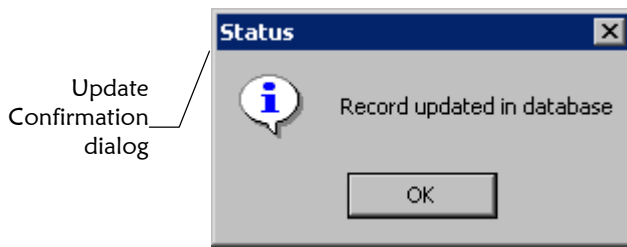
Update
Confirmation
dialog

Status

Record updated in database

OK

OK button

5   On the Update Confirmation dialog, click **OK**. The new information is saved in the database.

6   Do one of the following:

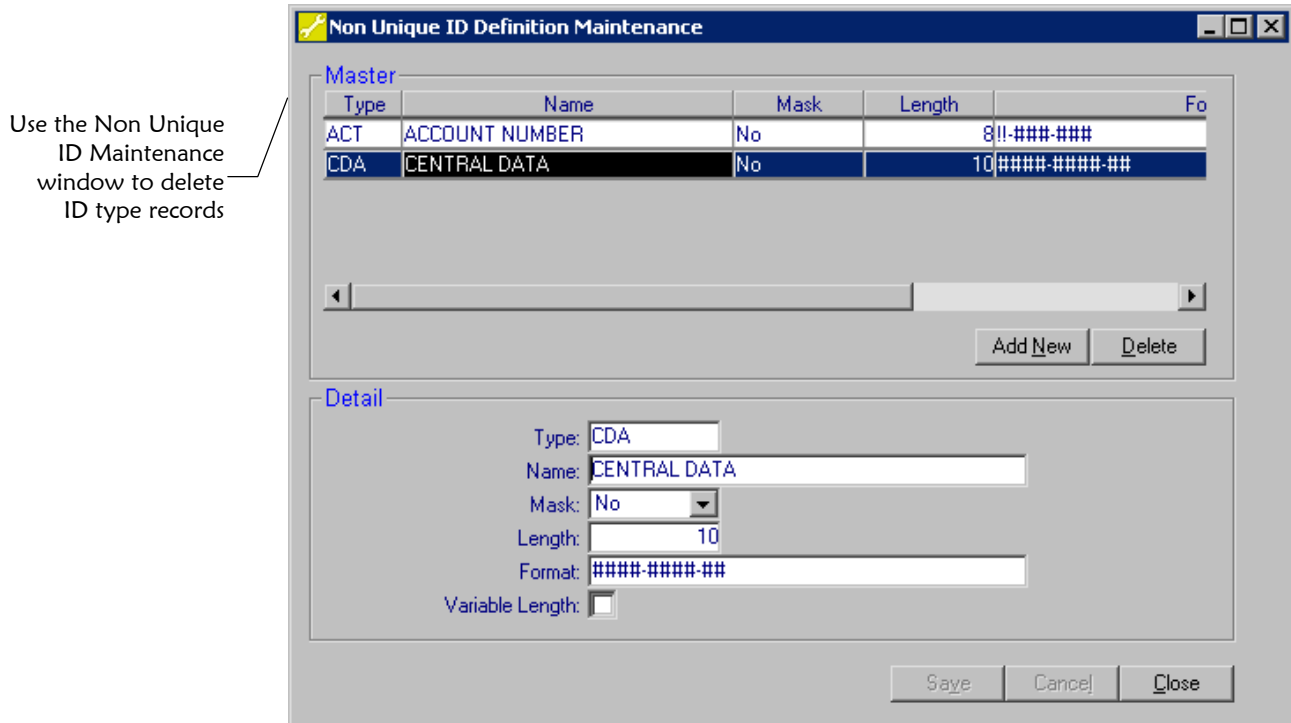*To modify information for additional messages*, repeat steps 2 through 5.

To close the Message Maintenance window, click **Close**.

Close

Close button
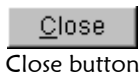
About System Message Maintenance Fields

The fields located on the System Message Maintenance window allow you to specify identifying information about the message you are adding. There are no defaults for these fields.

In this field …	type or select …
Code	A unique identification code for the system message.
	*Note: Code numbers consist of five digits, starting with 10000. You can specify whether the message code is displayed on message dialogs with the control key **SEEMSGCODE** (for more information, see "Defining Control Key Values" in Chapter 5 of this guide).*
Message	The full text of the message to display on the message dialog.
	*Note: This field holds up to 500 characters, so messages can be as detailed or as brief as desired. Parameters @**1** and @**2** are placeholders in the text for parameters that are supplied by the system, such as a UID. These placeholders indicate where the parameter is inserted in the actual message text.*
Title	The text that appears in the title bar of the message dialog, such as Note, Warning, Error, and so on.

In this field …	type or select …
Icon	The type of icon you want to display on the message dialog. You can choose from the following options. ![i] Information ![!] Exclamation ![X] Stop Sign ![?] Question
Button	The action buttons you want to display on the message dialog. You can choose from the following combinations: • **OK** • **Yes**, **No**, and **Cancel** • **OK** and **Cancel** • **Yes** and **No** • **Retry** and **Cancel** (currently not supported) • **Abort**, **Retry**, and **Ignore** (currently not supported) *Note: Changing the buttons does not affect processing.*
Default	An indicator that specifies which button in the button combination you selected receives the focus when the message dialog appears. Select **1** to make the first button in the list the default button, select **2** to make the second button in the list the default, and so on. *Note: The default button is indicated on the message dialog by a dotted outline around the text of the button. The default button is automatically selected when the message dialog displays.*
Message Type	The type of message you are defining. This field is not currently used, and is provided to allow for future flexibility of the e*Index Administrator.
Application	The application for which the message is available. Currently e*Index is the only available option.

This field or column …	displays this information …
Date Time and **Last Modified**	The date that the message information was last updated.

Modifying Non-unique ID Types

Once you add non-unique ID types to your database, you can modify information about those ID types. To modify a non-unique ID type, you need to display the Non Unique ID Definition Maintenance window.

Use the Non Unique ID Definition Maintenance window to modify non-unique ID types

▶ To modify a non-unique ID type

Before you begin:

✓ Obtain information about the ID type, such as the name of the ID type and it s unique identification code

NonUnique ID tool

1 On the Primary Toolbar, click **NonUnique ID**. The Non Unique ID Definition Maintenance window appears.

2 In the upper portion of the window, select the ID type you want to modify.

3 In the lower portion of the window, modify any open field (for more information, see "About Non-unique ID Type Fields" in chapter 3 of this guide).

Save tool

4   On the Non Unique ID Definition Maintenance toolbar, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

Status
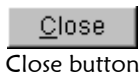
Record updated in database

OK

OK button
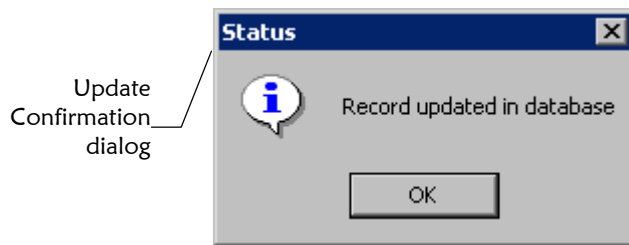
5   On the Update Confirmation dialog, click **OK**. The new information is saved in the database.

6   Do one of the following:

*To modify information for additional ID types*, repeat steps 2 through 5.

Close button

To close the Non Unique ID Definition Maintenance window, click **Close**.
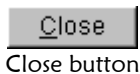
Deleting Non-unique ID Types

Once you add non-unique ID types to your database, you can delete those ID types when they become obsolete. To delete a non-unique ID type, you need to display the Non Unique ID Definition Maintenance window. Deleting a non-unique ID that has already been used may cause data integrity issues in member records. Use caution when deleting non-unique IDs.

Use the Non Unique ID Maintenance window to delete ID type records

▶ To delete a non-unique ID type

Before you begin:

✓   Obtain information about the ID type, such as the name of the ID type and it s unique identification code

1   On the Primary Toolbar, click **NonUnique ID**. The NonUnique ID Definition Maintenance window appears.

NonUnique ID tool

2   In the upper portion of the window, select the ID type you want to delete.

3   On the Non Unique ID Definition Maintenance toolbar, click **Delete**. The selected ID type is removed from the list.

Delete tool

4   Repeat steps 2 and 3 for each non-unique ID type you want to delete.

Save tool

5 On the Non Unique ID Definition Maintenance toolbar, click **Save**. The Update Confirmation dialog appears.

Update
Confirmation
dialog

Status

Record updated in database

OK

OK button
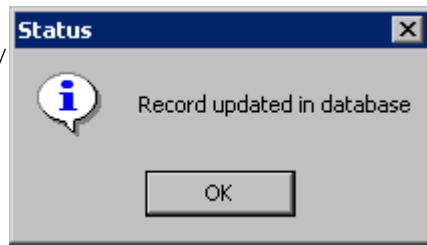
6 On the Update Confirmation dialog, click **OK**. The ID types are removed from the database and the Non Unique ID Definition Maintenance window closes.

Modifying Predefined Messages

Once you add predefined messages to your database, you can modify information about those messages. Pre-defined messages are standard comments that users can add to member profiles. To modify a predefined message, you need to display the Pre-Defined Msg Maintenance window.

Use the Pre-defined
Msg Maintenance
window to modify
predefined messages
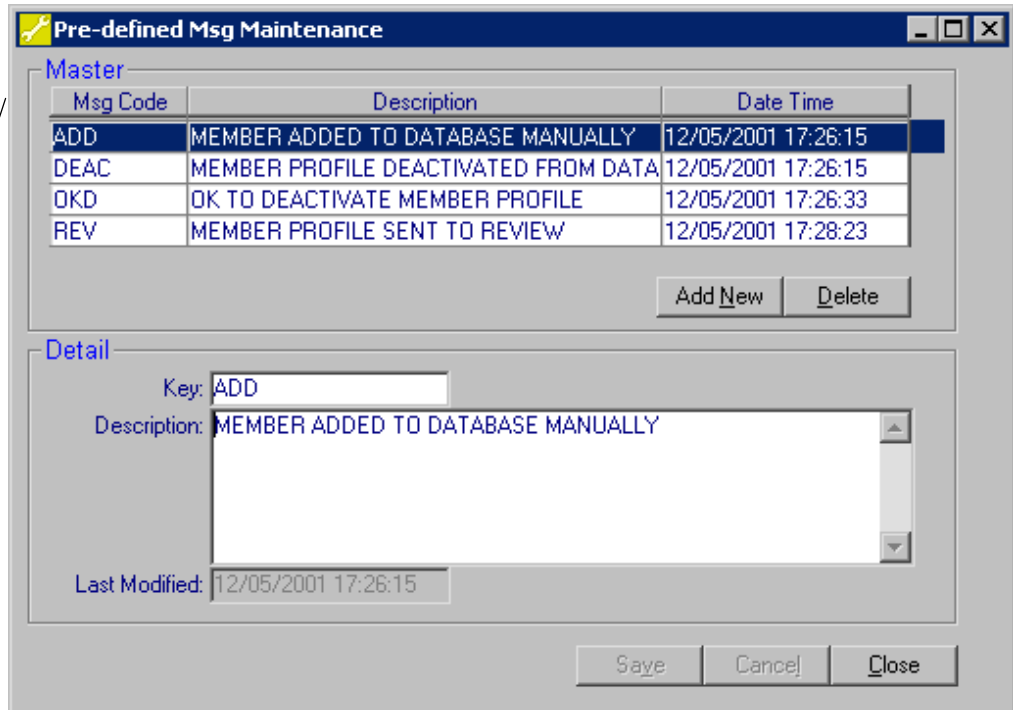
Pre-defined Msg Maintenance

Master

Msg Code	Description	Date Time
ADD	MEMBER ADDED TO DATABASE MANUALLY	12/05/2001 17:26:15
DEAC	MEMBER PROFILE DEACTIVATED FROM DATA	12/05/2001 17:26:15
OKD	OK TO DEACTIVATE MEMBER PROFILE	12/05/2001 17:26:33
REV	MEMBER PROFILE SENT TO REVIEW	12/05/2001 17:28:23

Add New   Delete

Detail

Key: ADD

Description: MEMBER ADDED TO DATABASE MANUALLY

Last Modified: 12/05/2001 17:26:15

Save   Cancel   Close

▶ To modify a predefined message

Before you begin:

✓ Obtain information about the message, such as the description of the message and its unique identification code

Pre-defined Message tool

1 On the Primary Toolbar, click **Pre-defined Message**. The Pre-defined Msg Maintenance window appears.

2 In the upper portion of the window, select the message you want to modify.

3 In the lower portion of the window, modify any open field (for more information, see "About Predefined Message Fields" in chapter 3 of this guide).

Save tool

4 On the Pre-defined Msg Maintenance toolbar, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog
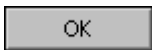
5 On the Update Confirmation dialog, click **OK**. The new information is saved in the database.

OK button

6 Do one of the following:

To modify information for additional messages, repeat steps 2 through 5.

To close the Pre-defined Msg Maintenance window, click **Close**.

Close button

Deleting Predefined Messages

Once you add predefined messages to your database, you can delete those messages if they become obsolete. To delete a predefined message, you need to display the Pre-defined Msg Maintenance window.

Use the Pre-defined Msg Maintenance window to delete predefined messages

▶ **To delete a predefined message**

Before you begin:

✓ Obtain information about the message, such as the description of the message and it s unique identification code

1 On the Primary Toolbar, click **Pre-defined Message**. The Pre-defined Msg Maintenance window appears.

Pre-defined Message tool

2 In the upper portion of the window, select the message you want to delete.

3 On the Pre-defined Msg Maintenance toolbar, click **Delete**. The selected message is removed from the list.

Delete tool

4 Repeat steps 2 and 3 for each message you want to delete.

Save tool

5 After you delete the predefined messages, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

Status

Record updated in database

OK
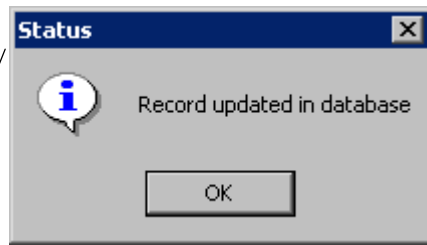
OK button

6 On the Update Confirmation dialog, click **OK**. The messages are deleted from the database.

Modifying System Information

Once you add systems to your database, you can modify information about those systems. To modify system information, you need to display the System Maintenance window.

Use the System Maintenance window to modify system information

System Maintenance

Master

Code	Description	Status	Region Code	Date Time
CBC	CAPE BURR CENTER	ACTIVE	EASTERN	12/04/2001 13:27:38
RDW	RDW	ACTIVE	EASTERN	12/04/2001 13:28:17
SBYN	SeeBeyond	ACTIVE		12/04/2001 12:26:44

Add New   Delete

Detail

Code: CBC   Description: CAPE BURR CENTER
Address1: 3487 BLOSSOM STREET
Address2:
City: CAPE BURR   State: CONNECTICUT
Zip: 09876 -   County: CAPE BURR
Country: UNITED STATES
Local ID Length: 10   Allow Less ID Length: No   Status: ACTIVE
Next Local ID: System Mask: No
Region Code: EASTERN   Local ID Mask: No
Local ID Format: ###-###-####   Last Modified: 12/04/2001 13:27:38

Save   Cancel   Close

▶ **To modify system information**

Before you begin:

✓ Obtain information about the system, such as the name of the system and its unique identification code

System tool

1 On the Primary Toolbar, click **System**. The System Maintenance window appears.

2 In the upper portion of the window, select the system you want to modify.

3 In the lower portion of the window, modify any open field (for more information, see "About System Fields" in chapter 3 of this guide).

Save tool

**4** On the System Maintenance toolbar, click **Save**. The Update Confirmation dialog appears.

Update
Confirmation
dialog

> Status
>
> Record updated in database
>
> OK

OK button

5 On the Update Confirmation dialog, click **OK**. The new information is saved in the database.

6 Do one of the following:

To modify information for additional systems, repeat steps 2 through 5.

Close button

To close the System Maintenance window, click **Close**.

Deleting System Information

Once you add systems to your database, you can delete those systems when they become obsolete. If a system becomes obsolete and you do not want to remove the system record from the database, you can deactivate the system instead of deleting it (for more information, see "Deactivating a System" later in this chapter). Deleting a system that has already been used may cause data integrity issues in member records. Use caution when deleting systems. To delete a system, you need to display the System Maintenance window.

Use the System
Maintenance
window to delete
system records
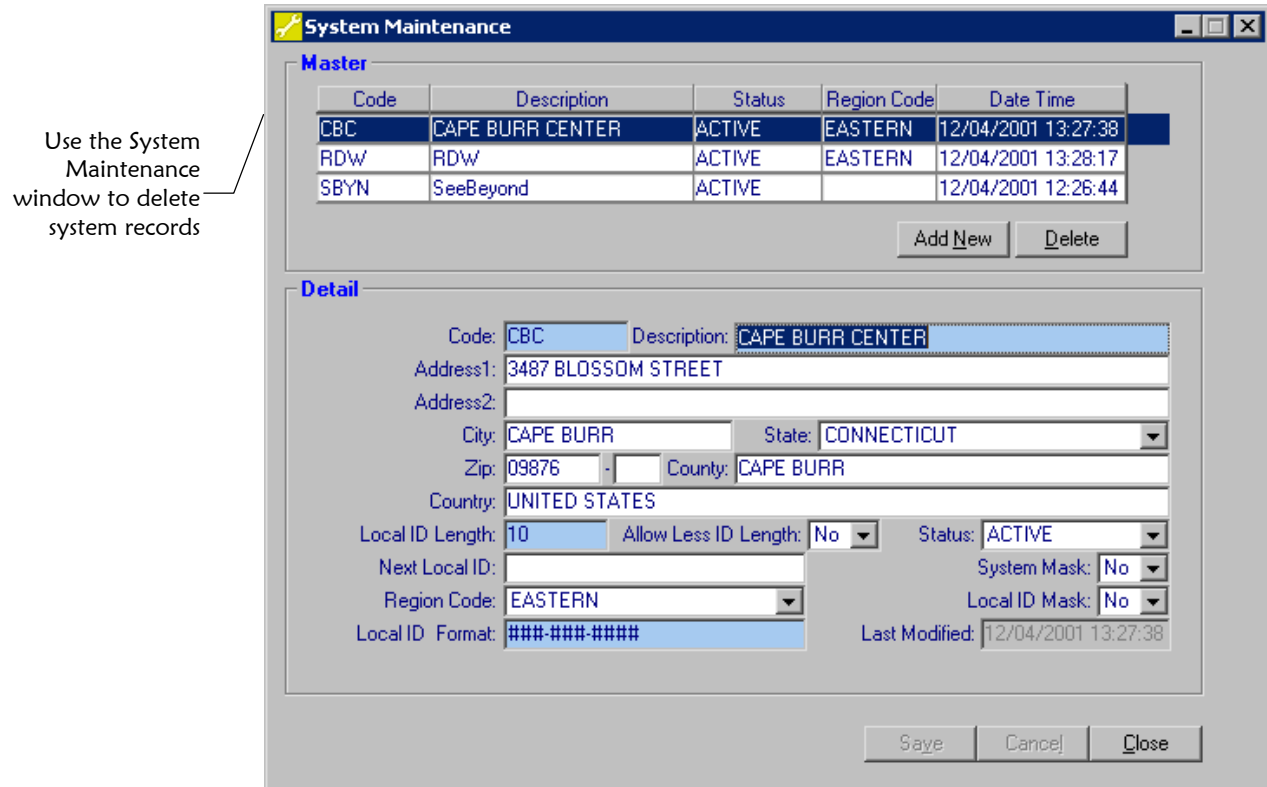
▶ **To delete a system**

Before you begin:

✓ Obtain information about the system, such as the name of the system
and its unique identification code

System tool

1 On the Primary Toolbar, click **System**. The System Maintenance
window appears.

2 In the upper portion of the window, select the system you want to
delete.

Delete tool

3 On the System Maintenance toolbar, click **Delete**. The system is
removed from the list.

4 Repeat steps 2 and 3 for each system you want to delete.

Save tool
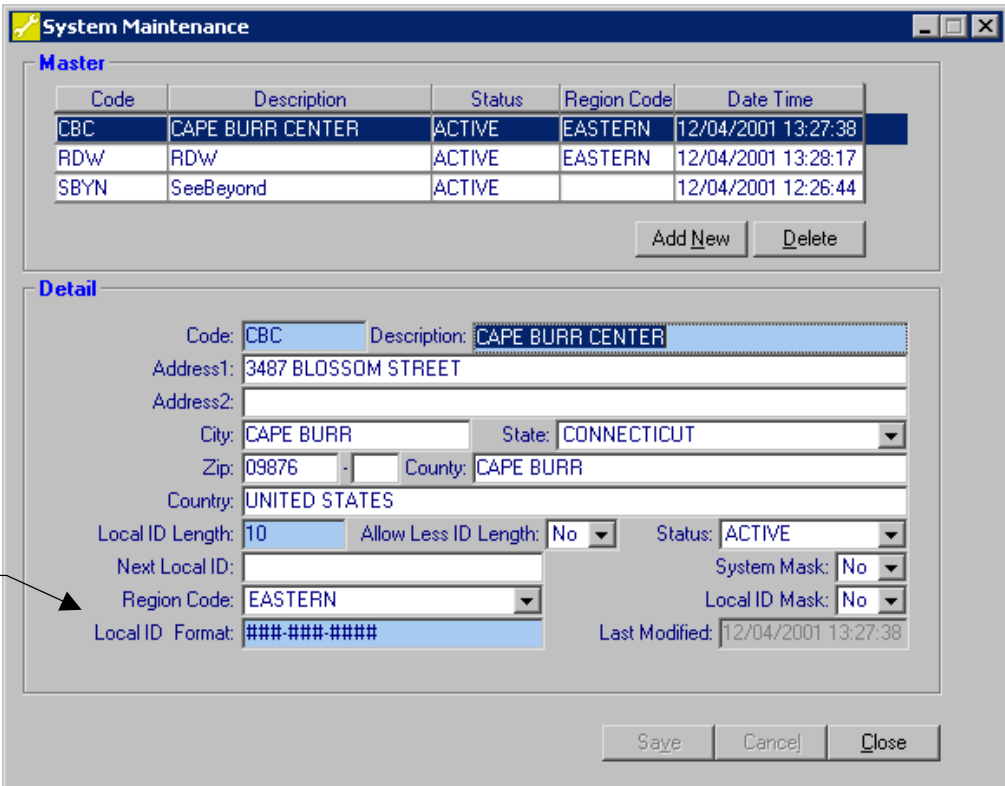
5 When you are finished, click **Save**. The Update Confirmation dialog appears.

Update
Confirmation
dialog

OK

OK button
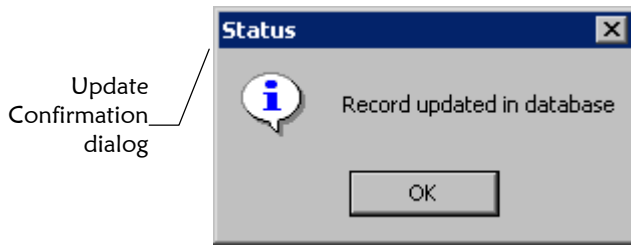
6 On the Update Confirmation dialog, click **OK**. The systems are deleted from the database.

Modifying a System's Local ID Format

Once you add systems to your database, you can specify or modify the way that system's local ID appears on the e*Index windows. You cannot delete a system's local ID format.

Use the System
Maintenance
window to modify a
system's local ID
format

▶ To modify a system's local ID format

Before you begin:

- ✓ Obtain information about the system, such as the name and unique identification code for the system, and the format of the local ID

System tool

1 On the Primary Toolbar, click **System**. The System Maintenance window appears.

2 In the upper portion of the window, select the system whose local ID you want to format.

3 In the lower portion of the window, modify the value in the **Local ID Format** field. For more information about the possible symbols you can use in this field, see "About System Fields" in Chapter 3 of this guide.

Save tool

4 On the System Maintenance toolbar, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

Status

Record updated in database

OK

OK button
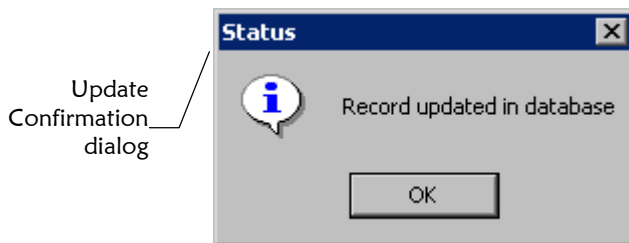
5 On the Update Confirmation dialog, click **OK**. The new information is saved in the database.

6 Do one of the following:

To specify local ID formatting for additional systems, repeat steps 2 through 5.

Close button

To close the System Maintenance window, click **Close**.
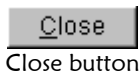
## Masking System Information

You can specify that the name of a system or the local IDs assigned by a system do not display in member profiles on the e*Index windows. Once you specify that a system's information be masked, it is masked for all existing and new member profiles in the database.

Use the System
Maintenance
window to specify
that a system's
local ID or name
be hidden

```
System Maintenance                                          _ □ ✕
  Master
    Code        Description        Status   Region Code    Date Time
   CBC      CAPE BURR CENTER       ACTIVE   EASTERN    12/04/2001 13:27:38
   RDW      RDW                    ACTIVE   EASTERN    12/04/2001 13:28:17
   SBYN     SeeBeyond              ACTIVE              12/04/2001 12:26:44

                                                    Add New      Delete

  Detail
          Code: CBC       Description: CAPE BURR CENTER
       Address1: 3487 BLOSSOM STREET
       Address2:
           City: CAPE BURR          State: CONNECTICUT
            Zip: 09876     -         County: CAPE BURR
        Country: UNITED STATES
   Local ID Length: 10    Allow Less ID Length: No       Status: ACTIVE
     Next Local ID:                               System Mask: No
     Region Code: EASTERN                        Local ID Mask: No
   Local ID  Format: ###-###-####        Last Modified: 12/04/2001 13:27:38

                                             Save     Cancel     Close
```

▶ To mask system information

Before you begin:

    ✓ Obtain information about the system, such as the name of the system and the unique identification code for the system

System tool

1 On the Primary Toolbar, click **System**. The System Maintenance window appears.

2 In the upper portion of the window, select the system whose information you want to mask.

3 Do one of the following:

To mask the system's local ID, select **Yes** in the **Local ID Mask** field.

To mask the system's name, select **Yes** in the **System Mask** field.

Save tool

4 On the System Maintenance toolbar, click **Save**. The Update Confirmation dialog appears.

Update
Confirmation
dialog

> **Status**
>
> (i) Record updated in database
>
> OK

OK button
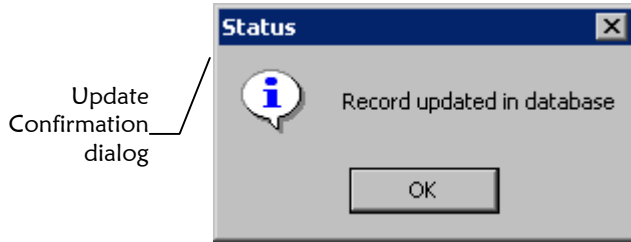
**5** On the Update Confirmation dialog, click **OK**. The new information is saved in the database.

6 Do one of the following:

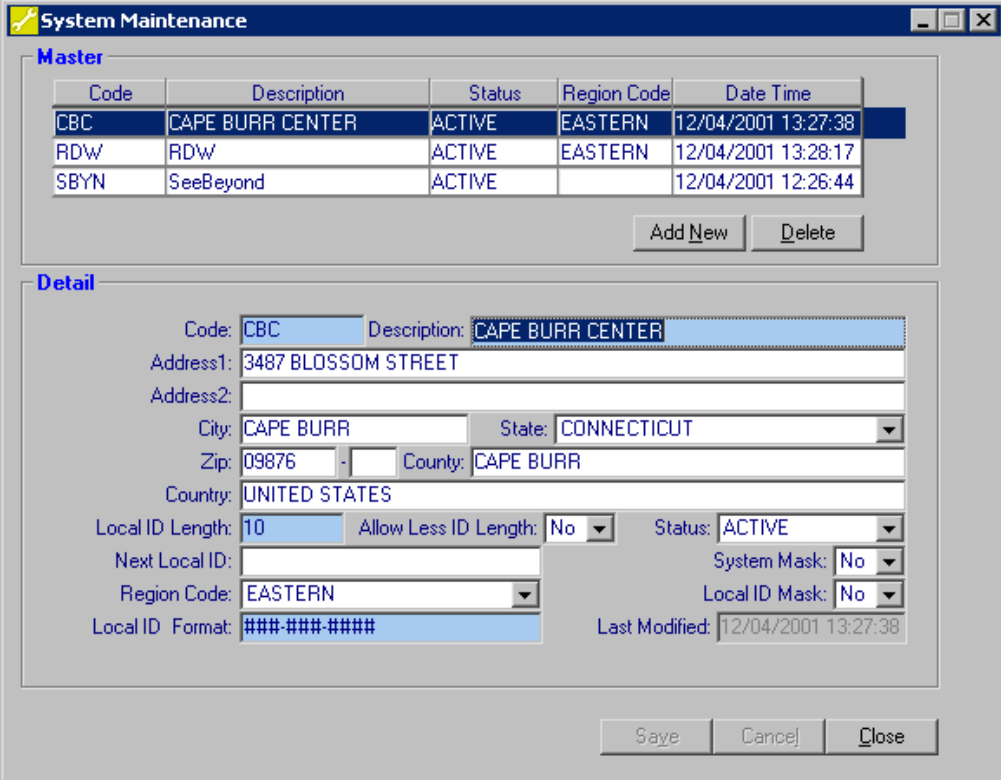*To mask information for additional systems*, repeat steps 2 through 5.

Close button

To close the System Maintenance window, click **Close**.
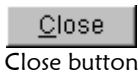
Unmasking System Information

If you previously specified that system's local ID or name information be masked on the e*Index windows, you can specify that the information be displayed instead. Once you specify that a system's information be unmasked, it is visible for all existing and new member profiles in the database.

Use the System
Maintenance
window to specify
that a system's
local ID or name
be displayed

System Maintenance

Master

Code	Description	Status	Region Code	Date Time
CBC	CAPE BURR CENTER	ACTIVE	EASTERN	12/04/2001 13:27:38
RDW	RDW	ACTIVE	EASTERN	12/04/2001 13:28:17
SBYN	SeeBeyond	ACTIVE		12/04/2001 12:26:44

Add New   Delete

Detail

Code: CBC   Description: CAPE BURR CENTER
Address1: 3487 BLOSSOM STREET
Address2:
City: CAPE BURR   State: CONNECTICUT
Zip: 09876 -   County: CAPE BURR
Country: UNITED STATES
Local ID Length: 10   Allow Less ID Length: No   Status: ACTIVE
Next Local ID: System Mask: No
Region Code: EASTERN   Local ID Mask: No
Local ID Format: ###-###-####   Last Modified: 12/04/2001 13:27:38

Save   Cancel   Close

▶ **To unmask system information**

Before you begin:

  ✓ Obtain information about the system, such as the name of the system and the unique identification code for the system

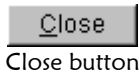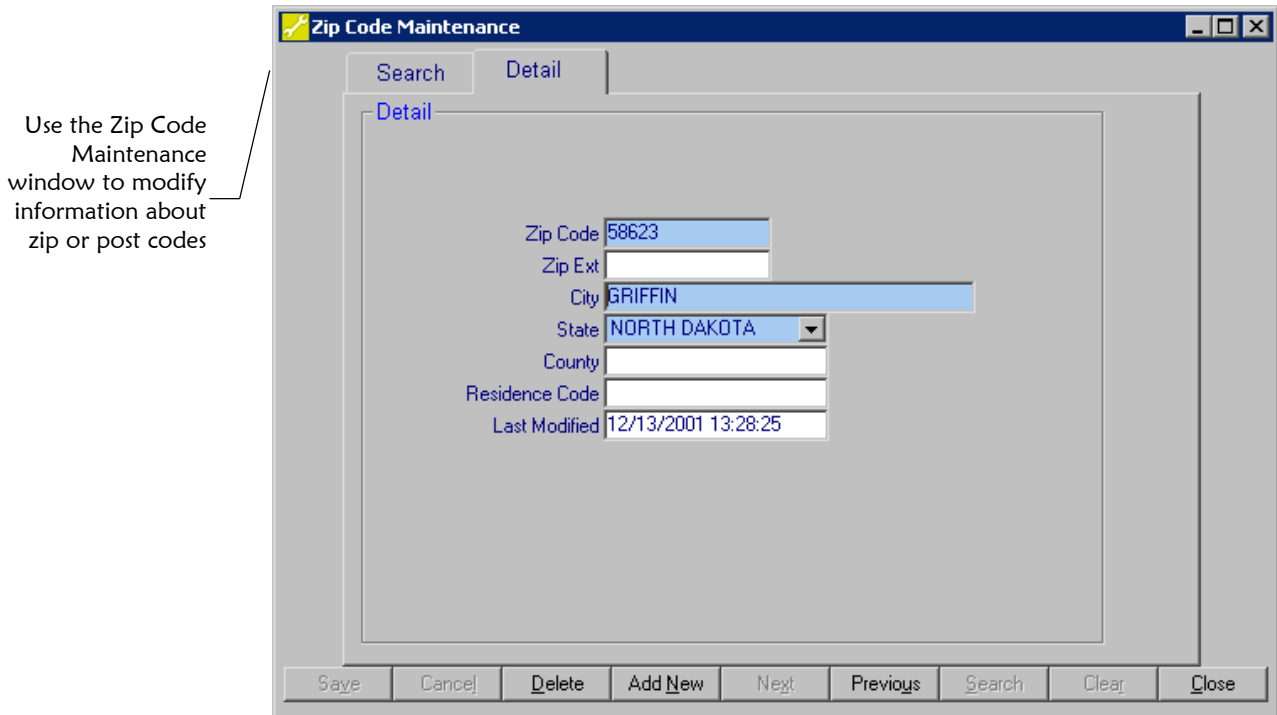**System tool**

1 On the Primary Toolbar, click **System**. The System Maintenance window appears.

2 In the upper portion of the window, select the system whose information you want to unmask.

3 Do one of the following:

  To unmask the system's local ID, select **No** in the **Local ID Mask** field.

  To unmask the system's name, select **No** in the **System Mask** field.

Save tool

4 On the System Maintenance toolbar, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

Status

Record updated in database

OK

OK button
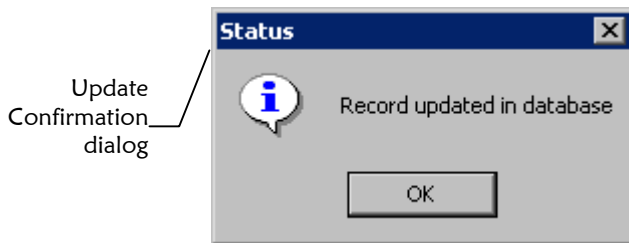
5 On the Update Confirmation dialog, click **OK**. The new information is saved in the database.

6 Do one of the following:

  To unmask information for additional systems, repeat steps 2 through 5.

Close button

  To close the System Maintenance window, click **Close**.
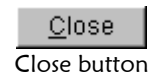
Assigning a System to a New Region

If you are using region-specific security, you may need to reassign the region to which a system is assigned. Changing a system's region assignment may require that you also change the regions to which user profiles are assigned in e*Index Security.

Use the System
Maintenance
window to change
the region to
which a system is
assigned

▶ To assign a system to a new region

Before you begin:

✓ Obtain information about the system, such as the name of the system
and the unique identification code for the system

System tool

1 On the Primary Toolbar, click **System**. The System Maintenance
window appears.

2 In the upper portion of the window, select the system whose region
assignment you want to change.

3 In the **Region Code** field, select the new region to which you want to
assign the system.

Save tool

4   On the System Maintenance toolbar, click **Save**. The Update
Confirmation dialog appears.

Update
Confirmation
dialog

Status

Record updated in database

OK

OK button

5   On the Update Confirmation dialog, click **OK**. The new information
is saved in the database.

6   Do one of the following:

To reassign regions for additional systems, repeat steps 2 through 5.

Close button

To close the System Maintenance window, click **Close**.
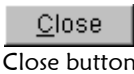
Deactivating a System

If a system is no longer active, you can deactivate the system. Once you have
deactivated a system, you can reactivate the system if necessary. To
deactivate a system, you need to display the system on the System
Maintenance window.

Use the System
Maintenance
window to
deactivate a system

System Maintenance

Master

Code	Description	Status	Region Code	Date Time
CBC	CAPE BURR CENTER	ACTIVE	EASTERN	12/04/2001 13:27:38
RDW	RDW	ACTIVE	EASTERN	12/04/2001 13:28:17
SBYN	SeeBeyond	ACTIVE		12/04/2001 12:26:44

Add New   Delete

Detail

Code: CBC   Description: CAPE BURR CENTER
Address1: 3487 BLOSSOM STREET
Address2:
City: CAPE BURR   State: CONNECTICUT
Zip: 09876 -   County: CAPE BURR
Country: UNITED STATES
Local ID Length: 10   Allow Less ID Length: No   Status: ACTIVE
Next Local ID: System Mask: No
Region Code: EASTERN   Local ID Mask: No
Local ID Format: ###-###-####   Last Modified: 12/04/2001 13:27:38

Save   Cancel   Close

▶ **To deactivate a system**

Before you begin:

✓ Obtain information about the system, such as the name of the system and the unique identification code for the system

System tool

1 On the Primary Toolbar, click **System**. The System Maintenance window appears.

2 In the upper portion of the window, select the system you want to deactivate.

3 In the **Status** field, select **Inactive**.

Save tool

4 On the System Maintenance toolbar, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

Status   ✕

ⓘ   Record updated in database

OK

OK button
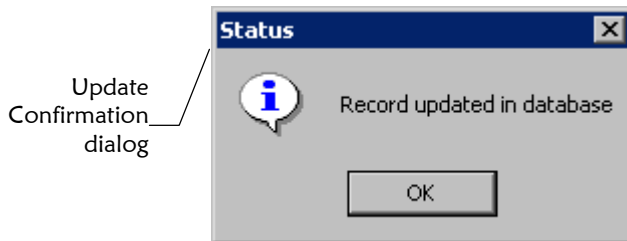
5 On the Update Confirmation dialog, click **OK**. The new information is saved in the database.

6 Do one of the following:

To deactivate additional systems, repeat steps 2 through 5.

Close button

To close the System Maintenance window, click **Close**.
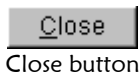
Reactivating a Deactivated System

If a system was deactivated in error or becomes active again, you can reactivate the system. To reactivate a system, you need to display the system on the System Maintenance window.

Use the System
Maintenance
window to
reactivate a
deactivated system

▶ **To reactivate a deactivated system**

Before you begin:

   ✓ Obtain information about the system, such as the name of the system and the unique identification code for the system

System tool

1 On the Primary Toolbar, click **System**. The System Maintenance window appears.

2 In the upper portion of the window, select the system you want to reactivate.

3 In the **Status** field, select **Active**.

Save tool

4 On the System Maintenance toolbar, click **Save**. The Update
    Confirmation dialog appears.

Update
Confirmation
dialog

Status

i Record updated in database

OK

OK button

5 On the Update Confirmation dialog, click **OK**. The new information
    is saved in the database.

6 Do one of the following:

Close button

To reactivate additional systems, repeat steps 2 through 5.

To close the System Maintenance window, click **Close**.

Modifying Zip Codes

Once a zip code has been added to the database, you can modify information
about the zip code, such as the city, county, zip code extension, and so on. To
modify information about a zip code, you need to perform a search for the
appropriate zip code record. You can also modify postcode information on
the Zip Code Maintenance window.

Use the Zip Code
Maintenance
window to modify
information about
zip or post codes

Zip Code Maintenance

Search | Detail

Detail

Zip Code 58623
Zip Ext
City GRIFFIN
State NORTH DAKOTA
County
Residence Code
Last Modified 12/13/2001 13:28:25

Save | Cancel | Delete | Add New | Next | Previous | Search | Clear | Close

▶ To modify a zip code

Before you begin:

✓ Obtain information about the zip code you need to modify, such as the 5-digit zip code, or the city and state with which it is associated

Zip Code tool

1 On the Primary Toolbar, click **Zip Code**. The Zip Code Maintenance window appears with the Search page displayed.

Locate the zip code you want to modify on the Search page of the Zip Code Maintenance window
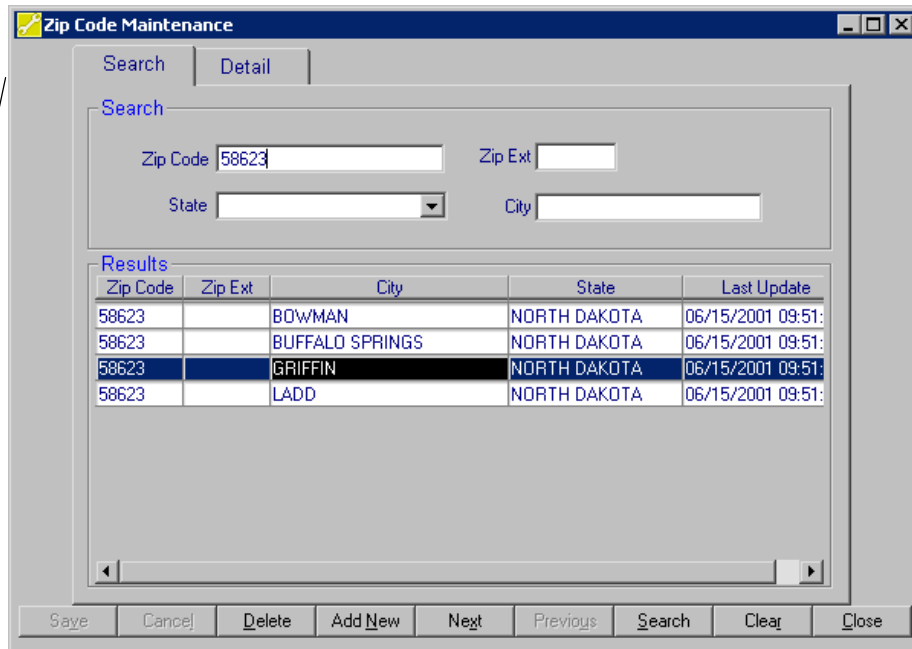
2 In the upper portion of the Zip Code Maintenance window, enter your search criteria (for more information, see "About Zip Code Search Fields" following this procedure).

Search tool

3 On the Zip Code Maintenance toolbar, click **Search**. A list of zip codes matching your search criteria appears in the lower portion of the window (for more information, see "About Zip Code Results Fields" following this procedure).

4 Double-click the zip code you want to modify. The Detail page appears, displaying additional information about the zip code.

5 Modify any open field (for more information, see "About Zip Code Fields" in Chapter 3 of this guide).

Save tool

6 On the Zip Code Maintenance toolbar, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

Status	✕
ℹ️ Record updated in database	
OK	

OK button

7 On the Update Confirmation dialog, click **OK**. The new information is saved in the database.

8 Do one of the following:

To modify additional zip codes, repeat steps 2 through 7.

Close button

To close the Zip Code Maintenance window, click **Close**.
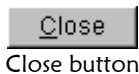
About Zip Code Search Fields

The fields located in the upper portion of the Search page of the Zip Code Maintenance window allow you to specify search criteria for the zip code you want to find. There are no defaults for these fields.

In this field …	type or select …
Zip Code	The 5-digit zip code that you want to modify.
Zip Ext	The extension to the zip code that you want to modify.
State	The state associated with the zip code you want to modify.
City	The city associated with the zip code you want to modify.

About Zip Code Results Fields

The fields located in the lower portion of the Search page of the Zip Code Maintenance window allow you to view information about the zip codes that match your search criteria.

This field …	displays this information …
Zip	The 5digit zip code associated with the displayed city and state.
Zip Ext	The extension to the 5-digit zip code.
State-	The state associated with the displayed zip code.
City	The city associated with the displayed zip code.

This field …	displays this information …
Last Update	The date and time the zip code information was created or was last updated.

Deleting a Zip Code

If you add a zip code to the database in error, you can delete that zip code. This action cannot be undone, so use caution when deleting zip codes from the database. To delete a zip code, you need to perform a search for the appropriate zip code record.

Use the Zip Code Maintenance window to delete zip code information

▶ **To delete a zip code**

Before you begin:

✓ Obtain information about the zip code you need to delete, such as the 5-digit zip code, or the city and state with which it is associated

Zip Code tool

1 On the Primary Toolbar, click **Zip Code**. The Zip Code Maintenance window appears with the Search page displayed.

2 In the upper portion of the Zip Code Maintenance window, enter your search criteria (for more information, see "About Zip Code Search Fields" earlier in this chapter).

Search button

3   On the Zip Code Maintenance toolbar, click **Search**. A list of zip codes matching your search criteria appears in the lower portion of the window (for more information, see "About Zip Code Results Fields" earlier in this chapter).

4   Do one of the following:

Delete tool
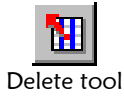
To delete a zip code from the results list, select the zip code you want to delete, and then click **Delete**. The Delete Confirmation dialog appears.

Delete tool

To view additional information about the zip code before you remove it, double-click the zip code that you want to remove, view the information, and then click **Delete**. The Delete Confirmation dialog appears.

Delete
Confirmation
dialog

Warning   ☒

?   Confirm to delete?

OK   Cancel

OK button
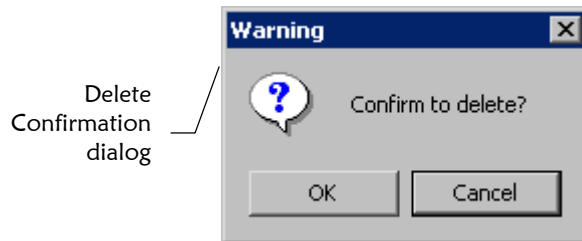
5   Click **OK** on the Delete Complete dialog.

6   Do one of the following:

To delete additional zip codes, return to the Search page and repeat steps 2 through 6.

Close button
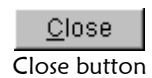
To close the Zip Code Maintenance window, click **Close**.

Customizing e*Index

About this Chapter

Overview

This chapter presents the background information and the step-by-step instructions you need to configure the fields displayed on the e*Index GUIs, international attributes of e*Index, system parameters, and candidate selection queries.

The following diagram illustrates the contents of each major topic in this chapter.

About e*Index Customizations	Learn about the tasks you can perform to tailor e*Index to your business requirements
System Parameters	Learn how to modify the system parameters that specify how data is processed
Field Labels	Learn how to hide or display fields on the e*Index GUIs, and how to change field names
Country-Specific Options	Learn how to specify country-specific options by modifying requirements for addresses, national identifiers, and so on
Configurable Queries	Learn how to modify the queries used for phonetic searches and potential duplicate evaluation

Learning About e*Index Customizations

Overview

This section of the chapter describes the different ways you can customize e*Index by configuring control keys, field labels, international options, and candidate selection queries.

What are Matching Thresholds?

When e*Index receives an incoming member record, it uses the Vality matching algorithm to assign matching weights that indicate the likelihood of a match between the incoming record and records that already exist in the database. You can specify *matching thresholds* that tell e*Index how to process incoming records based on the matching algorithm probability weights between records.

Figure 5-1 on the following page illustrates the matching, duplicate, and maximum thresholds.

■ **Matching Threshold**
  The matching threshold specifies the weight at which two profiles are assumed to represent the same person and are automatically merged (if automatic merging is enabled in the 1XACTMATCH control key). You can specify the value for this threshold with the MATCHTHRES control key.

■ **Duplicate Threshold**
  The duplicate threshold specifies the minimum weight at which two profiles are considered potential duplicates of one another. The matching threshold indicates the maximum weight for potential duplicates. You can specify the value for this threshold with the DUPTHRES control key.

■ **Minimum Probability**
  The minimum probability threshold only affects e*Index GUI searches, and specifies a minimum matching weight for profiles returned from a search. No profiles with matching weights below the minimum threshold appear in the results list. You can specify the value for this threshold with the THRESHOLD control key.

■ **Maximum Probability**
  The maximum probability threshold specifies the maximum matching probability weight used by e*Index. You can specify the value for this threshold with the MAXPROB control key.

Figure 5-1: Matching Probability Weight Thresholds

New Member Profle → **e*Index Global Identifier Matching Algorithm** → **New or Matched Member Profile**

Maximum Threshold —————— **Profiles are a match**

Matching Threshold —————— **Profiles may be a match**

Duplicate Threshold —————— **Profiles do not match**

e*Index Database
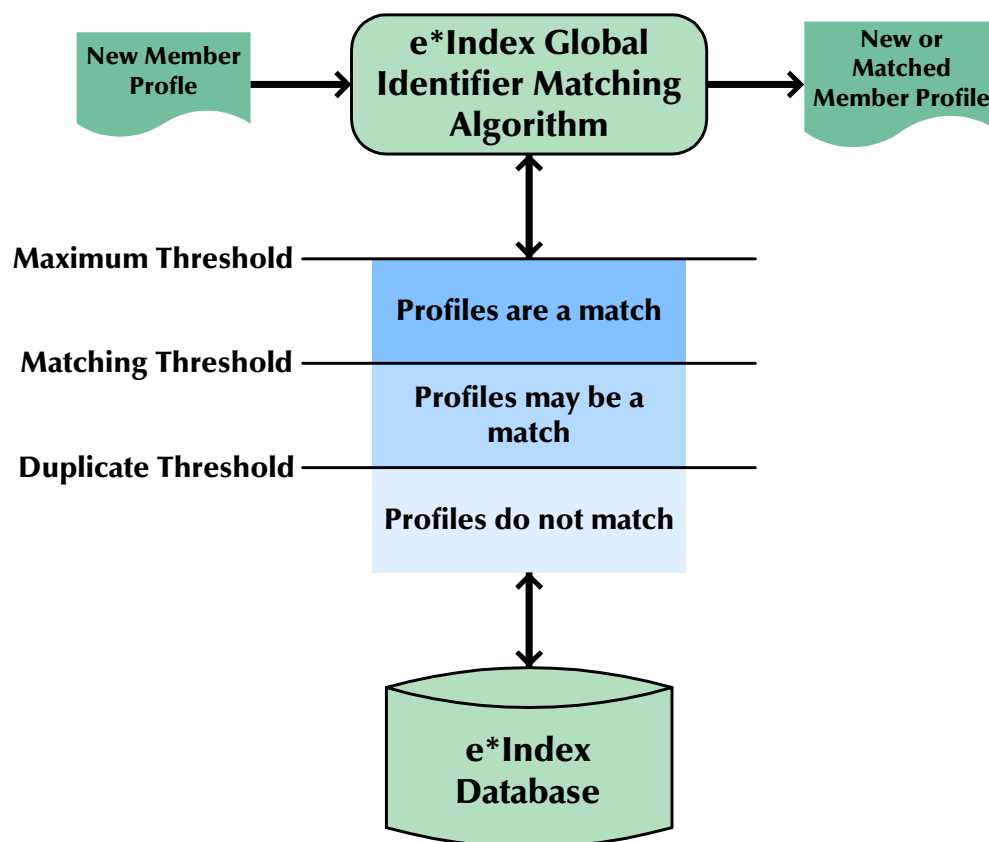
What is Control Key Maintenance?

You configure your e*Index system using a set of system parameters, called *control keys*, that are provided in the Control Key Maintenance function. Control keys allow you to customize how your system processes and finds data, how information appears, what information users can view, and so on. By changing the value of the control keys, you can specify date formats, specify matching probability weights for various thresholds, increase or limit search capabilities, specify search characteristics, and so on.

What Control Keys are Available?

e*Index Administrator provides several control keys, and each is used to configure a specific system parameter of e*Index. Some control keys work in conjunction with each other to perform related functions.

1XACTMTCH

When a new member record is added to the database, e*Index first checks for any possible matches, and returns those matches in a *candidate selection pool*. The *1XACTMTCH* control key allows you to specify whether all records in the candidate selection pool that have weights above the match threshold (see MATCHTHRES) are treated as potential duplicates. When you set this key to **Y**, all matches above the threshold are treated as potential duplicates. When you set it to **N**, the matching record with the highest matching weight above the matching threshold is merged with the new record. Note that even though one record may be an assumed match, there may still be several other potential duplicate records with matching weights that are above the matching threshold.

ALLOWNUM

The *ALLOWNUM* control key allows you to specify whether numeric characters can be entered into the **First Name**, **Middle Name**, and **Last Name** fields in the GUI. When you set the value to **Y**, numeric values are allowed in the name fields. When you set it to **N**, only alphabetic characters may be entered. For example, with this key set to **Y**, *Doe1* would be allowed in the **Last Name** field. With this key set to **N**, *Doe* would be allowed but not *Doe1*.

ALSRCHLMT

The *ALSRCHLMT* control key allows you to limit the number of records that can be retrieved for a user audit log search in the e*Index GUI. You can set this value to any integer. An error message appears if the search returns more than the specified number of records, prompting the user to perform a more specific search.

ASSMTCH

You can use the *ASSMTCH* control key to specify whether to write all assumed matches to the *ui_assumed_match* table. When you set this key to **Y**, assumed matches from both the GUI and e*Ways are written to the table. When you set this key to **N**, they are not written to the table. This is for reporting purposes only, and allows you to view all assumed matches made by e*Index. We recommend setting this control key to **Y**, but setting it to **N** may improve processing speed.

ATSRCHLMT

The *ATSRCHLMT* control key affects only the e*Index GUI, and allows you to limit the number of records that can be retrieved for an audit trail search. You can set this value to any integer. An error message appears if the search returns more than the specified number of records, prompting the user to perform a more specific search.

AUDITONOFF

The *AUDITONOFF* control key only affects the e*Index GUI, and allows you to log and display the amount of time it takes to perform certain functions in e*Index, such as searches, updates, additions, and so on. When you set this key to **Y**, the amount of time taken for the current transaction appears at the bottom of the window. When you set this key to **N**, the amount of time does not appear. Time is displayed in seconds.

BLNKONUPDT

Using the *BLNKONUPDT* control key, you can specify whether to treat a blank field as null when performing an update from the e*Index e*Ways. For records entered through the back-end, double quotes indicate a blank field. When you set this key to **Y**, then a blank field will overwrite the existing value in that field during an update transaction. When you set this key to **N**, a blank field does not update existing values during an update transaction. For a complete discussion of how this control key affects API processing, see "How do Control Keys Affect the APIs" in Chapter 4 of the *e*Index Global Identifier Technical Reference*.

CKSUMLEN

The *CKSUMLEN* control key allows you to specify the length of the checksum value. Checksum values help validate UIDs in order to ensure accurate identification of member profiles throughout the system. The checksum process attaches a number, generated through an algorithm, to the end of a new UID in order to validate that UID when transmitting messages. When a host system receives this number, it strips off the last two digits to find the UID, and then recalculates the checksum using the same algorithm process. If the checksums agree, the host system knows the UID number is correct.

The CHECKSUM control key works with the UIDLENGTH control key in the following manner. UIDLENGTH specifies the length of the sequential UID generated in the *ui_seq_no* table (see "UIDLENGTH" later in this chapter for more information). However, when you specify a CHECKSUM length greater than 0, e*Index creates sequential UIDs based on the *ui_seq_no* table, and then appends the check sum value to the end of the UID to determine the final UID number. For example, if you set UIDLENGTH to 8 and CHECKSUM to 2, then the UIDs assigned by e*Index will be 10 characters long. If the next sequence number is **10908000**, then the UID assigned to the next record is the **10908000** plus the check sum (**1090800034**, for example). The next UID would be **10908001** plus the check sum (**1090800125**, for example). The first 8 digits are sequential, but the last 2 digits are arbitrary.

COUNTRY

Use the *COUNTRY* control key to specify the country format to use for the e*Index GUI windows. You can specify the United States, United Kingdom, Australia, France, or Ireland for this control key. Certain labels and formats

change on the application windows depending on the country you choose. For example, the United States version has **Social Security Number** fields, while the United Kingdom version has **NHS Number** fields instead. For a more complete description of the country-specific options, see "What are Country-Specific Options?" and "Configuring Country-Specific Options" later in this chapter.

e*Index also provides address rule sets for the matching algorithm for each country code. If you change the COUNTRY control key from USA, you need to specify that the address rule set for the new country code is "In Use" and that the USA address rule set is no longer "In Use". For more information, see "Modifying Rule Set Information" in chapter 6 of this guide.

DATEFRMT

By modifying the DATEFMT control key, you can specify the date format displayed on the e*Index application windows. This allows flexibility with databases using date formats other than the format used in the United States (MM/DD/YYYY). For example, in the date format used in Europe or Australia the day precedes the month (DD/MM/YYYY).

DEBUGLVL

Using the *DEBUGLVL* control key, you can specify where to send debug messages for e*Index on a UNIX system. When you set this control key to **1**, the debug messages are sent to standard output. When you set it to **0**, debug messages display on the UNIX monitor. It is recommended that the value be set to **1** when first using e*Index.

DEBUGSQL

Using the *DEBUGSQL* control key, you can specify whether to display the active SQL statement before executing a search from the e*Index GUI. When you set this key to **Y**, a window displaying the SQL statement to be executed appears when you initiate a search. This allows you to see how the search is processed.

DEMOSRCLMT

Using the *DEMOSRCLMT* control key, you can limit the number of records that are retrieved for a demographic search performed from the e*Index GUI. An error message appears if the search returns more than the specified number of records, prompting the user to perform a more specific search. You can set this value to any integer. Use this control key to decrease the time required to process demographic searches.

DOBYYREQ

The *DOBYYREQ* control key allows you to specify whether a user must enter the year of birth when performing an alphanumeric search from the e*Index

GUI. If you set this key to **Y**, the year is required when performing an alphanumeric search. When you set the key to **N**, the year is not required.

DUPCHK

Using the *DUPCHK* control key, you can specify whether to run a check for potential duplicates each time a key field in a member profile is updated from either the GUI or the e*Ways. When you set this key to **Y**, a potential duplicate check runs each time. When you set it to **N**, a potential duplicate check does not run when a profile is updated. The impact on processing time when you set this control key to **Y** depends on the number of member records in the database and whether extensive searching is enabled (that is, the EXTNSVSRCH key is set to **Y** and the configurable queries have been modified to include extensive searching). With a larger database and an extensive search being run on each record, processing time will most likely increase. Setting this control key to **Y** may also cause a larger number of potential duplicate records with matching weights that are above the match threshold, since the updated information may cause a closer match with an existing record. Assumed matching cannot be performed during an update, so the records remain potential duplicates with high matching weights.

DUPTHRES

The *DUPTHRES* control key allows you to specify a minimum matching weight for which a profile is considered a potential duplicate of the profile being added. All profiles that have a higher matching probability weight than this threshold are considered potential duplicates of the new profile. The value of this key can range from zero to the current value entered for the MAXPROB control key.

ENCOUNTER

If you are using a customized encounter module with e*Index, you must set the *ENCOUNTER* control key to **Y** in order to access the encounter information. This enables the encounter module and allows you to view encounter information for the members in the database. The encounter module is not currently available for e*Index, so you should set this value to **N**.

ENDTIME

You can specify a default value for the **End Time** field on the Audit Trail, Audit Log, and Potential Duplicate Search windows using the *ENDTIME* control key. The value you specify automatically appears in the **End Time** field each time a user opens the Audit Trail, Audit Log, or Potential Duplicate Search window.

EXTNSVSRCH

You can turn on and off the extensive search capability for alphanumeric searches from the GUI using the *EXTNSVSRCH* control key. When you set this control key to **Y**, a demographic alphanumeric search for member profiles also searches through alias names. When you set this key to **N**, demographic alphanumeric searches do not include the alias table. This control key only applies to transactions performed through the e*Index GUI. To enable extensive searching for phonetic searching and for the searches e*Index performs to evaluate potential matches, you need to modify the configurable queries (described later in this chapter). For instructions on modifying the configurable queries to enable extensive searching, see "Configuring Extensive Searching" later in this chapter.

LNEXCTRSRCH

The *LNEXCTRSRCH* control key allows you to specify the maximum number of characters a user can enter in the last name field to perform an exact search for members. For example, if this key is set to **3**, then you must enter three or fewer characters in the **Last Name** field to perform an exact search. If a user enters more than three characters into the **Last Name** field, the search retrieves all names beginning with those characters. The value you specify must be between one and five.

MATCHTHRES

Use the *MATCHTHRES* control key to specify the matching probability weight at which e*Index automatically merges a new profile with an existing potential duplicate profile. This key can be set to any integer less than or equal to the maximum probability but greater than the duplicate threshold.

MAXPROB

The *MAXPROB* control key allows you to specify the maximum matching probability weight to be used by e*Index. You can set this control key to any integer. See your SeeBeyond Project Manager if you need help to determine the most effective value for this weight.

MIXEDCASE

The *MIXEDCASE* control key allows you to specify whether the GUI allows entries with mixed-case characters. If this key is set to **Y**, then mixed-case characters are allowed. If the key is set to **N**, then only capital letters are entered into the GUI. We recommend that you only enable this feature if it is absolutely essential that you enter and store names in both upper-case and lower-case. For consistency, enable this control key if the e*Index e*Ways populate data into the database in both upper and lower case. Disable this control key if e*Ways only populate upper-case data into the database. This control key applies to all windows in all three e*Index applications, including the Login and Change Password windows. Make sure that if this control key

is set to **N** all users know to enter their passwords in uppercase characters when they log on.

PDSRCHLMT

You can limit the number of records than can be retrieved for a potential duplicate search using the *PDSRCHLMT* control key. You can set this value to any integer. An error message appears if the number of matching records returned from a search exceeds the search limit, prompting the user to perform a more specific search.

PVSUMMARY

e*Index 4.5 provides the ability to view key information on a single window in the GUI, similar to e*Index 4.1.1. The summary tab displays address and telephone information, aliases, local ID and system pairs, and other identifying information. By modifying the PVSUMMARY control key, you can specify whether to display this summary tab. If you set the value for this control key to **Y**, then the summary page appears when you first access member information. If you set the value to **N**, then the summary page does not appear at all. You can specify which address type and telephone type to display on this page by modifying the Summary Tab options in **Country Specific Options**.

SEEDEACTIV

The *SEEDEACTIV* control key allows you to specify whether deactivated profiles appear in the results of member searches on the GUI. With this control key set to **Y**, deactivated profiles appear along with the current active profiles. When this control key is set to **N**, deactivated profiles do not appear in the search results. This control key only affects standard alpha and general searches performed from the GUI.

SEEMERGED

The *SEEMERGED* control key allows you to specify whether merged profiles appear in the results of member searches on the GUI. With this control key set to **Y**, merged profiles appear along with the current active profiles. With this control key set to **N**, merged profiles do not appear in the search results. This control key only affects standard alpha and general searches performed from the GUI.

SEEMSGCODE

The *SEEMSGCODE* key controls whether the message code of a message dialog appears on the dialog next to the message dialog title. When this key is set to **Y**, message dialog titles display the numeric code number next to the title text. For example, the title of a confirmation dialog displays as **Confirmation** when SEEMSGCODE is set to **N**, but it displays as **20010:Confirmation** when the control key is set to **Y**.

SHORTID

The *SHORTID* control key allows you to specify that the social security number (SSN) field in the e*Index GUI allows less than nine characters. By default, e*Index validates the SSN field to ensure that a 9-digit SSN is entered. The SHORTID control key allows organizations that use an identifier other than the SSN to enter a shorter value and override the default validation. Enter **Y** for this key to allow shorter values.

SMARTCARD

The value you specify for the *SMARTCARD* control key determines whether the smart card capabilities for e*Index are enabled. Only specify **Y** for this key if you have smart card technology installed on your system.

SMEFACREP

You can enable or disable same system potential duplicate reporting using the *SMEFACREP* control key. This key determines whether same system duplicates are recorded as same system potential duplicate or as regular potential duplicates. Setting this control key to **Y** disables same system duplicate reporting, and potential duplicates with local IDs in the same system are not recorded as same-system duplicates. When you set the key to **N**, same system potential duplicates are recorded as existing in the same system. Note that same system potential duplicates may have higher matching probabilities than potential duplicates from different systems since no assumed matching is performed on records that originate from the same system.

SNDXSRCH

The *SNDXSRCH* control key allows you to disable or enable the phonetic (Soundex) search in the GUI. If you set this key to **Y**, this type of search is enabled; if you set the key to **N**, this type of search is disabled and users can only perform alphanumeric searches (for more information about phonetic and alphanumeric searches, see Chapter 3 of your *e*Index Global Identifier User's Guide*).

SRCHDOB

Using the *SRCHDOB* control key, you can define a range of years surrounding the date of birth that a user specifies for a demographic alphanumeric search. A search includes all years within the range you define. For example, if the range is set to **5** and the date of birth entered for a search is 01/15/1970, then the search includes the years 1965 to 1975 (1970+5 and 1970-5). This range does not apply to phonetic searches.

STARTTIME

Using the *STARTTIME* control key, you can specify a default value for the **Start Time** field on the Audit Trail, Audit Log, and Potential Duplicate

Search windows. This value automatically appears in the **Start Time** field each time a user opens the Audit Trail, Audit Log, or Potential Duplicate Search window.

THRESHOLD

For each search, the e*Index application determines profiles that are possible matches of the search criteria by using matching probability weights. The *THRESHOLD* control key allows you to specify the minimum matching probability weight for the records displayed for a search. A search only retrieves those records with a matching probability weight that is higher than this threshold. This helps you to limit GUI searches to only those profiles that are most likely to be a match.

UIDLENGTH

The *UIDLENGTH* control specifies the length of the UIDs that e*Index assigns to each member profile for both GUI and e*Way transactions. If you modify the UID length, you must modify the value of the next UID to be the same length. To do this, modify the **seq_no column** in the *ui_seq_no* table for the row where **table_name='ui_person'**. It is best to modify this column prior to creating the database (see the appropriate database chapter in the *e*Index Global Identifier Installation Guide* for more information). If the database is already created, disable the trigger **ui.tub_ui_seq_no** before modifying the column.

If you use a check sum, the actual length of the UIDs is the length specified for UIDLENGTH plus the length specified for the CKSUMLEN control key (see "CKSUMLEN" earlier in this chapter for more information). Regardless of whether you use a check sum, the value you specify for the next UID in the *ui_seq_no* table should be the same length as specified by UIDLENGTH (and not the combined length of UIDLENGTH and CHECKSUM).

UVAUDITLOG

The *UVAUDITLOG* control key determines whether user audit logging is enabled for e*Index. When the value for this control key is set to **Y**, then a record is written to the *ui_audit* table each time the *ui_person* table is accessed, allowing you to monitor access to person information. You can view audit log records using the User Audit Log function in the e*Index GUI.

What is Display Configuration?

In order to provide flexibility in displaying information on the e*Index GUI, e*Index Administrator provides the Display Configuration function. Display Configuration gives you the ability to modify the names of the fields that appear on the e*Index windows. For example, by default the e*Index GUI displays a field named **Ethnic Group**. If this information is not relevant to your business but the geographic region is relevant, you can change the name of this field to

Region and store the region in which each member resides in this field instead. You can also specify the fields that appear on the windows and the fields that are hidden from view. When e*Index is installed, a set of default fields, with their default label names, appear on the windows. You can modify these fields and labels as required to suit the requirements of your business.

What are Country-Specific Options?

The Country Specific Option function allows you to customize certain attributes of e*Index that tend to vary depending on the country in which the application is installed. The tasks you can perform from the Country Specific Option function include:

- Specify the rule set to use for the Address Search function in e*Index.

- Define parsing rules used by the matching algorithm for address information.

- Modify the format for the national identifier, postal code, and telephone fields.

- Modify the names of the search types on the Search page of the e*Index Search window.

- Specify the Address Type and Phone Type that are displayed on the Summary tab (if the PVSUMMARY control key is set to display the Summary tab).

- Modify the names of the labels for the tabbed windows in the e*Index GUI.

Important! Modifying the rule set and address parsing information can be a very complicated task. It is very important that you have a complete understanding of your Vality rule sets before selecting the rule set to use and modifying the values of the rule set attributes.

How do Display and Country Specific Options Correspond?

When you modify the names of the fields displayed on the e*Index GUI (using the Display Configuration function), you may also want to make corresponding changes to the tabbed labels or search titles (using the Country Specific Options function). For example, if you change the Social Security Field to National Identifier, you may want to change the title of the Social Security Number Search to National Identifier Search.

By default the Search window displays SSN fields and a Social Security Number section

Use Country Specific Options to modify the name of the search section ...

and use Display Configuration to change the name of the search field

Or, if you change the fields on the Miscellaneous tab so they display account information, you may want to change the name of the Miscellaneous tab to **Account** as displayed on the following page.

By default, this tab is named "Miscellaneous"

By default, the Miscellaneous tab displays generic fields

Use Country Specific Options to change the name of the tabbed heading to Account ...

... and use Display Configuration to change the names of the fields

What Steps are Required for Country Specific Customization?

When you customize e*Index for a specific country configuration, there are several steps to follow to ensure that you have completely localized your implementation. Following is a summary of tasks to complete, along with the locations of specific instructions for completing each task.

1   In Control Key Maintenance, specify the country for which you are localizing e*Index in the COUNTRY control key. For information about the COUNTRY

control key, see "COUNTRY" under "What Control Keys are Available?" earlier in this chapter. For information about modifying control key values, see "Specifying Control Key Values" later in this chapter.

2   In Rule Set Maintenance, make sure that the address rule set for the country you specified for the COUNTRY control key is "**In Use**" and that the default address rule set, USADDR, is no longer "**In Use**". For information about modifying rule sets, see "Modifying Rule Set Information" in Chapter 6 of this guide.

3   Customize country-specific attributes, including address parsing rules; tabbed page titles; search type titles; field formats for the national identifier, telephone numbers, and postal codes; and which address and telephone types to display on the Summary tab. This is an optional step, and you can leave these attributes at their default values if you prefer. For more information, see "Configuring Country-Specific Options" later in this chapter.

4   Specify the fields you want to display on the e*Index GUI, which fields are required, and the label for each field. This step is also optional. For more information about field customization, see "Configuring Display Options" later in this chapter.

What is Configurable Candidate Selection (CSS)?

When you perform a phonetic search from the GUI, e*Index uses specific information to form a SQL statement to query the database. e*Index uses similar information to form SQL statements when evaluating possible matches of profiles sent to e*Index from the external systems and from the GUI. When evaluating possible matches, e*Index performs a SQL search to retrieve the *candidate selection pool*. The matching algorithm processes the profiles retrieved from that search and assigns them matching weights.

CSS (also known as the configurable query) provides you with the ability to define the required criteria and the conditions for phonetic searching and for potential duplicate candidate selection.

By default, the queries for both search types include the following criteria combinations, based on the phonetic code for each name field except mother's maiden name.

- First name, date of birth, and gender, *or*
- Last name and first name, *or*
- Last name and mother's maiden name, *or*
- Social security number

The Configurable Query function allows you to modify the default criteria requirements and conditions so phonetic and candidate selection searches are performed using the search criteria and conditions that you define. Only one query can be defined for each type at a given time. You can modify these queries

as needed. For information about how the configurable query ties in with the Vality matching algorithm and rule set files, see "Vality and the Configurable Query" in chapter 6 of this guide.

How do GUI Customizations Affect the e*Index Schema?

Some of the customizations you make to e*Index affect the schema, such as some control keys (as noted earlier in this chapter), rule set customizations, and the configurable query. Since many of the customizations you make do not directly affect the e*Index schemas, you may want to modify the schema to match your GUI customizations.   For example, if you make certain fields required in the GUI, you may want to make them required in the e*Ways. If you change the field names and the type of data you display on the GUI, you should make similar changes to the ETD you are using. The control keys that affect e*Index API are described in Chapter 4 of your *e*Index Global Identifier Technical Reference*.

Specifying Control Key Values

Overview

When you install e*Index, the control keys (or system parameters) are set to their default values. You may need to modify these values to suit your business requirements. Follow the steps below to specify the control key values:

- ■ Step1: Determine System Parameter Requirements

- ■ Step 2: Modify Control Key Values

Step1: Determine System Parameter Requirements

Before you begin to modify the control key values, determine the values that will best suit your data processing requirements. For example, if you are working with a very large database and speed is an issue, you should not enable both extensive searching and potential duplicate checking for update transactions. Before you modify control keys, review the control key descriptions under "What Control Keys are Available?" earlier in this chapter. Your SeeBeyond project manager can also help you determine the appropriate values for your system.

Step 2: Modify Control Key Values

You can modify system parameters by changing the value of any existing control key in e*Index Administrator. Use the Control Key Maintenance function to specify system parameters.

Use the Control Key Maintenance window to modify control key values
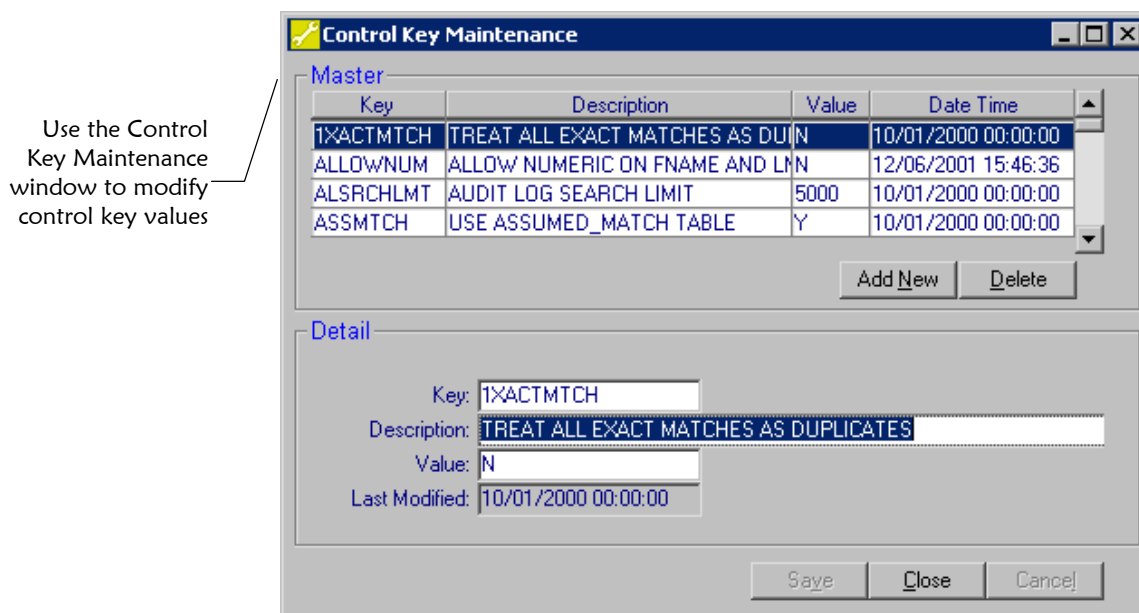
▶ To modify control key values

Before you begin:

    ✓ Complete "Step1: Determine System Parameter Requirements"

Control Key tool

1 On the Primary Toolbar, click **Control Key**. The Control Key Maintenance window appears.

2 In the upper portion of the Control Key Maintenance window, highlight the control key you want to modify. The detailed information appears in the lower portion of the window.

3 In the lower portion of the window, modify the control key value (for more information, see "About Control Key Fields" and "About Control Key Default Values" following this procedure).

Note: For more information about the purpose and function of each control key, see "What Control Keys are Available?" earlier in this chapter.

Save tool

4 On the Control Key Maintenance toolbar, click **Save**. Your changes are saved to the database.

About Control Key Fields

The control key fields, located on the Control Key Maintenance window, allow you to specify the values you want to associate with each control key.

In this field …	type or select …
Key	The name of the control key you are modifying.
	Default: The name highlighted in the upper portion of the window
Description	A short description of the control key.
	Default: The description associated with the selected control key
Value	The value of the selected control key (for more information, see "What Control Keys are Available?" earlier in this chapter).
	Default: The value previously assigned to the control key (for more information, see "About Control Key Default Values")

This field …	displays this information …
Last Modified	The date that the control key was created or was last updated.

About Control Key Default Values

When you first install e*Index Administrator, default values are automatically created for each control key. The defaults for each key are listed below.

Control Key	Default Value	Possible Values
1EXACTMTCH	N	Y or N
ALLOWNUM	Y	Y or N
ALSRCHLMT	5000	Any integer
ASSMTCH	Y	Y or N
ATSRCHLMT	5000	Any integer
AUDITONOFF	N	Y or N
BLNKONUPDT	Y	Y or N
CKSUMLEN	0	Any integer
COUNTRY	USA	AUS (Australia), FRA (France), GBR (England), IRL (Ireland), or USA (United States)
DATEFRMT	MMDDYYYY	MMDDYYYY, DDMMYYYY, or YYYYMMDD
DEBUGLVL	0	0 or 1
DEBUGSQL	N	Y or N
DEMOSRCLMT	3000	Any integer
DOBYYREQ	N	Y or N
DUPCHK	Y	Y or N
DUPTHRES	7.25	Any real number below the match threshold
ENCOUNTER	N	Y or N
ENDTIME	23:59:59	Any time in HH:MM:SS format, based on a 24-hour clock
EXTNSVSRCH	Y	Y or N
LNEXCTSRCH	2	Any integer from 1 to 5
MATCHTHRES	29	Any real number less than the maximum probability
MAXPROB	1000	Any integer
MIXEDCASE	N	Y or N
PDSRCHLMT	3000	Any integer
PVSUMMARY	N	Y or N
SEEDEACTIV	Y	Y or N

Control Key	Default Value	Possible Values
SEEMERGED	Y	Y or N
SEEMSGCODE	N	Y or N
SHORTID	N	Y or N
SMARTCARD	N	Y or N
SMEFACREP	N	Y or N
SNDXSRCH	Y	Y or N
SRCHDOB	10	Any integer from 0 to 10
STARTTIME	00:00:01	Any time in HH:MM:SS format, based on a 24-hour clock
THRESHOLD	-100.0	Any integer
UIDLENGTH	10	1 to 15
UVAUDITLOG	N	Y or N

Configuring Display Options

Overview

You can change the name of most fields that appear on the application GUIs, and you can determine which fields to display on the GUIs and which fields to hide. You can also specify that a field is required or not required when adding member profiles through the GUI. You can perform any of the following tasks to configure your display options.

■ Searching for Fields in Display Configuration

■ Modifying Field Labels

■ Hiding Fields from View

■ Displaying Hidden Fields

■ Specifying Required Fields

Before you make display changes, be sure you perform a thorough analysis of the data that will be transmitted to e*Index and the type of information you need to store and display.

Tips:

■ *When you change field labels for the e*Index GUI, the corresponding names are not changed in e*Index Administrator. For example, if you modify the **Title** field label in e*Index, the maintenance window in e*Index Administrator still displays **Table Level Maintenance: Title**.*

■ *When you change field labels, consider the space available on the e*Index windows for that field. The label may be cut off if the field label is too long.*

■ *In order for the changes you make to a specific field to occur across all windows in the GUI, you need to make the modifications to the same field for each of the configurable tables in which the field occurs.*

■ *If you change field names, you may also want to consider changing the search type labels and tab labels.*

Searching for Fields in Display Configuration

To locate the field label you want to modify in Display Configuration, you can perform a search based on various criteria for the row. You can also simply scroll through the display configuration list to find the field you want to modify.

Note: *You can sort the information in the configuration table by any column by clicking on the column heading. This allows you to view all of the rows with the same field label name or all of the rows from the same table.*

You can search for
specific fields on the
Display
Configuration
window
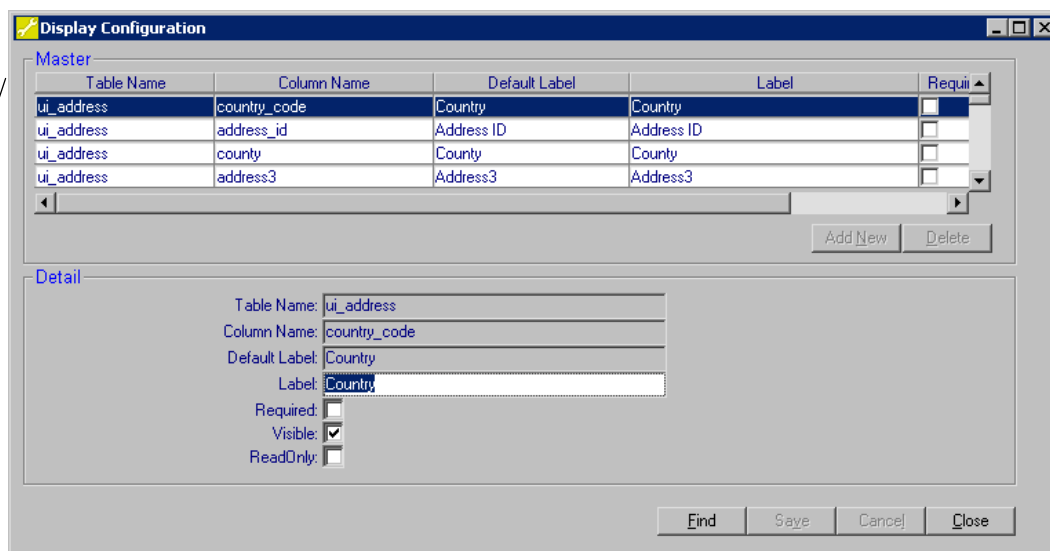
▶ **To search for field labels in Display Configuration**

Before you begin:

✓ Determine information about the fields you want to display, such as the name of the field label, the name of the database table in which it is stored, and so on

Display
Configuration tool

1 On the Primary Toolbar, click **Display Configuration**. The Display Configuration window appears.

Find/Retrieve tool

2 On the Display Configuration toolbar, click **Find/Retrieve**.

3 In the lower portion of the Display Configuration window, enter the search criteria for the field label you want to display (for more information, see "About Display Configuration Fields" following this procedure).

Note: Search criteria are case sensitive.

Find/Retrieve tool

4 On the Display Configuration toolbar, click **Find/Retrieve** again. All rows that match the search criteria appear in the upper portion of the window.

About Display Configuration Fields

The display configuration fields, located on the Display Configuration window, allow you to specify the names of the fields that display on the e*Index windows, and which fields you want to display. The defaults for these fields vary depending on the field label you have selected.

In this field …	type or select …
Label	The name for the field label as it appears on the e*Index windows.

Select this option …	to specify that…
Required	The field is required when adding a member profile, system, or zip code to e*Index. If this option is not selected, then the displayed field is not required.
Visible	The selected field appears on the e*Index windows. If this option is not selected, then the displayed field will not appear on the e*Index windows.

This field …	displays this information …
Table Name	The name of the database table associated with the displayed field labels. The table names for which you can modify field labels include *ui_address*, *ui_alias*, *ui_aux_id*, *ui_local_id*, *ui_person*, *ui_phone*, and *ui_transaction*.
Column Name	The name of the column in the database table associated with the displayed field label.
Default Label	The default name of the field label. If a field label was changed, you can refer to this field to see what the original name of the field was.

This option …	indicates whether …
Read Only	Information about the displayed field label and attributes can be modified. If this option is selected, only the Label can be modified; the remaining attributes cannot be modified. If the option is not selected, the field label and most attributes can be modified.
	Note: The read only option cannot be modified, so a record marked read only can never be changed to be not read only. Most fields that are marked as read only do not appear on the e*Index windows.
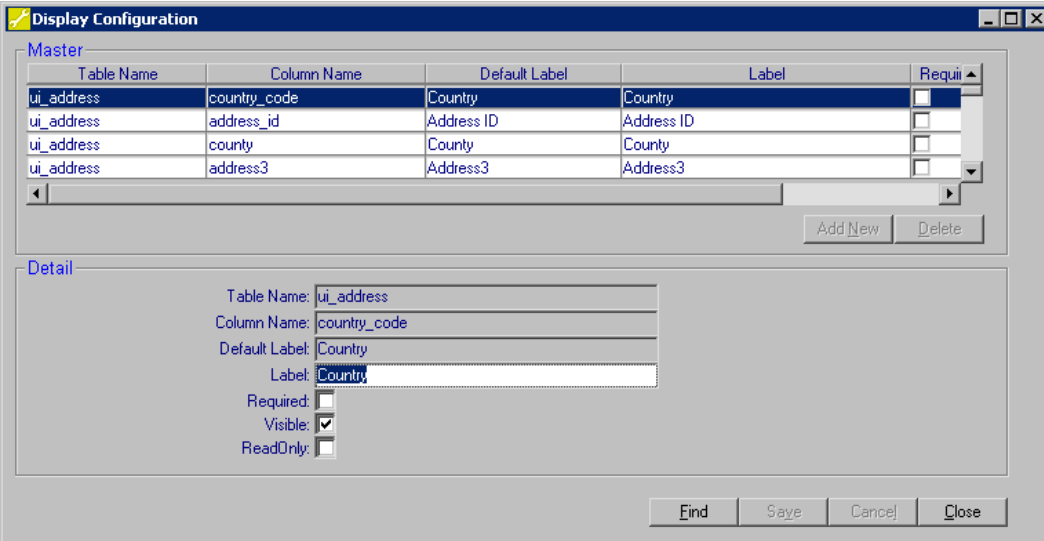
Modifying Field Labels

If the information you need to display on the e*Index windows is not included in any of the field names currently displayed, you can modify the names of the fields or choose to display additional fields. For example, if you only store account numbers in the **Other ID** fields, you can change the name of the **Other ID Name** field to **Account Name**, and the name of the **ID** field to **Account Number**. You can then change the name of the Other ID search box and Other IDs tabbed heading to **Account Number**. You can also modify some fields on the e*Index Administrator windows.

For more information about changing search headings, see "Modifying Search Type Labels" later in this chapter. For more information about changing tabbed headings, see "Modifying e*Index Tab Labels" later in this chapter.

Use the Display Configuration window to modify field labels on the e*Index GUI

▶ To modify field labels

Before you begin:

✓ Determine the names you want to use for the fields displayed on the GUI windows

Display Configuration tool

1 On the Primary Toolbar, click **Display Configuration**. The Display Configuration window appears.

2 Perform a search for the field label you want to modify as described in "Searching for Fields in Display Configuration" earlier in this chapter. The search results appear in the display configuration list.

3 In the upper portion of the Display Configuration window, highlight the row you want to modify. The detailed information for that row appears in the lower portion of the window.

4 In the lower portion of the window, enter the new name for the field in the **Label** field.

5 Repeat steps 2 through 4 for each label you want to modify.

Save tool

6 On the Display Configuration toolbar, click **Save**. A confirmation dialog appears.

Confirmation dialog

Status

Record updated in database

OK
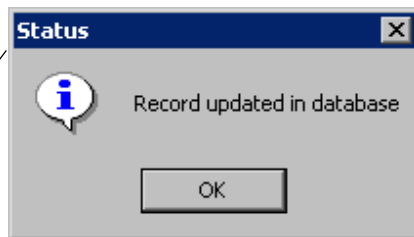
OK button

7 On the Confirmation dialog, click **OK**. The changes are saved, and the new field labels appear on the e*Index windows.

Other ID section with the default labels

Other ID

Other ID Name ACCOUNT NUMBER   ID 82-37-4029

New field and section labels for the Other ID section

Account Number

Account Name MIDLAND   Account Number 293-87-420

Hiding Fields from View

If you do not want to display all of the information that currently appears on the GUI windows, you can specify that certain fields be hidden. For example, if you do not want to specify racial or ethnic information about your members, you can specify that the **Race** and **Ethnic Group** fields do not appear on the Demographic page. By default, these fields are visible. Make sure that you do not specify that any required fields be hidden.

Use the Display
Configuration
window to hide
fields on the
e*Index GUI
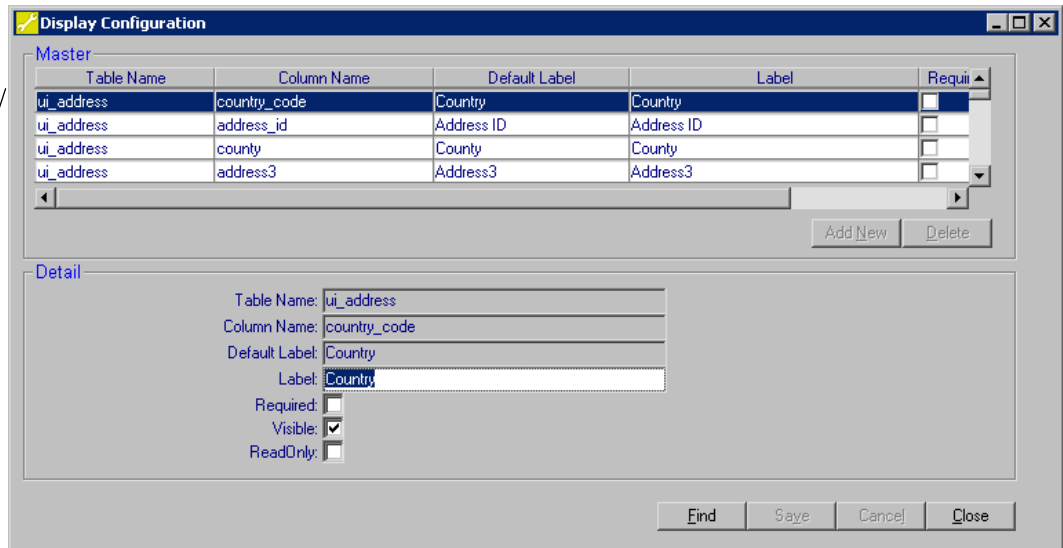
▶ **To hide fields from view**

Before you begin:

✓ Determine which fields you do not want to display on the e*Index windows

Display
Configuration tool

1 On the Primary Toolbar, click **Display Configuration**. The Display Configuration window appears.

2 Perform a search for the field label you want to hide as described in "Searching for Fields in Display Configuration" earlier in this chapter. The search results appear in the display configuration list.

3 In the upper portion of the Display Configuration window, highlight the row you want to hide. The detailed information for that row appears in the lower portion of the window.

4 In the lower portion of the window, clear the **Visible** check box.

5 Repeat steps 2 through 4 for each field you want to hide.

Save tool

6 On the Display Configuration toolbar, click **Save**. A confirmation dialog appears.

Confirmation
dialog

Status ×

Record updated in database

OK
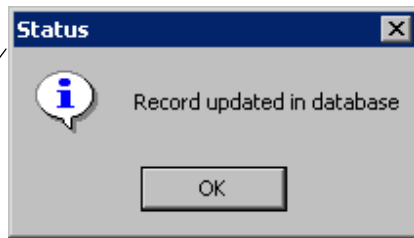
OK button

7 On the Confirmation dialog, click **OK**. The changes are saved, and the specified fields no longer appear on the e*Index windows.

Demographics

Title PHD	Suffix	Marital Status MARRIED
Religion AGNOSTIC	Language ENGLISH	Ethnic Group ENGLISH
Race WHITE	Veteran Status NONE	

The Maiden and
Mother's Maiden
fields appear on the
default windows

Maiden MILLER   Father's Name MARK   Spouse's Name ANDREW
Mother's Maiden MARTIN   Mother's Name JULIE

Demographics

Title PHD	Suffix	Marital Status MARRIED
Religion AGNOSTIC	Language ENGLISH	Ethnic Group ENGLISH
Race WHITE	Veteran Status YES	

You can hide the
Maiden and
Mother's Maiden
fields from view

Father's Name MARK   Spouse's Name ANDREW
Mother's Name JULIE

Displaying Hidden Fields

If you want to display fields in addition to those already displayed on the e*Index GUIs, you can specify that fields that are currently hidden be displayed on the e*Index windows. For example, if you want to display military information for each member, you can specify that the **Military Branch**, **Military Rank**, and **Military Status** fields appear on the Demographics tab.

Use the Display
Configuration
window to display
hidden fields on the
e*Index GUI
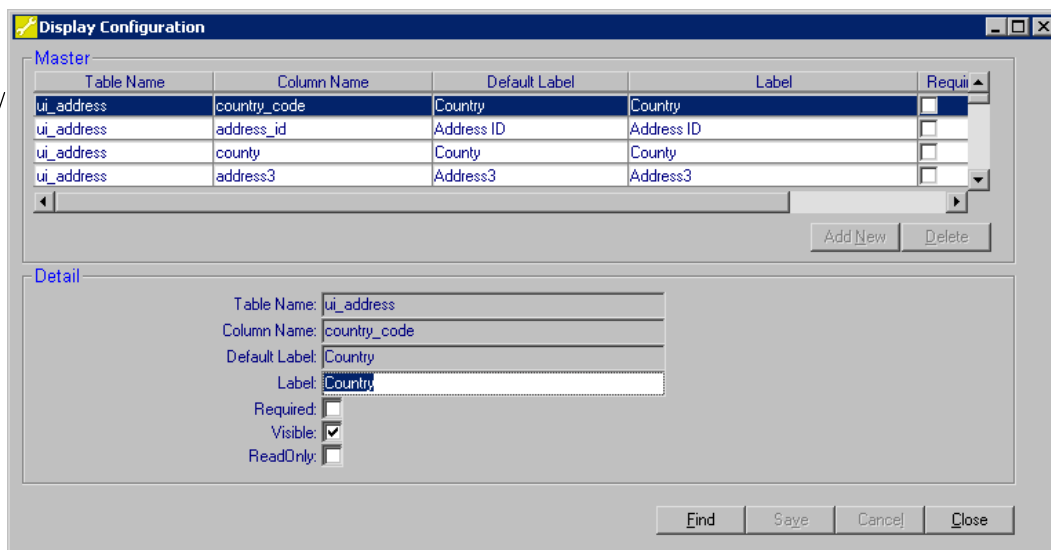
▶ To display hidden fields

Before you begin:

✓ Determine which fields you do want to display that are not currently
displayed

**Display
Configuration tool**

1 On the Primary Toolbar, click **Display Configuration**. The Display
Configuration window appears.

2 Perform a search for the field label you want to display as described
in "Searching for Fields in Display Configuration" earlier in this
chapter. The search results appear in the display configuration list.

3 In the upper portion of the Display Configuration window, highlight
the row you want to display. The detailed information for that row
appears in the lower portion of the window.

4 In the lower portion of the window, select the **Visible** check box.

5 Repeat steps 2 through 4 for each field you want to display.

Save tool

6 On the Display Configuration toolbar, click **Save**. A confirmation dialog appears.

Confirmation dialog

Status

Record updated in database

OK

OK button

7 On the Confirmation dialog, click **OK**. The changes are saved, and the specified fields now appear on the e*Index windows.

Demographics

Title PHD	Suffix	Marital Status MARRIED
Religion AGNOSTIC	Language ENGLISH	Ethnic Group ENGLISH
Race WHITE	Veteran Status NONE	

Maiden MILLER	Father's Name MARK	Spouse's Name ANDREW
Mother's Maiden MARTIN	Mother's Name JULIE	

The military fields do not appear on the default window

Demographics

Title PHD	Suffix	Marital Status MARRIED
Religion AGNOSTIC	Language ENGLISH	Ethnic Group ENGLISH
Race WHITE	Veteran Status YES	

Maiden MILLER	Father's Name MARK	Spouse's Name ANDREW
Mother's Maiden MARTIN	Mother's Name JULIE	
Military Branch ARMY	Military Rank PRIV	Military Status INCV

The military fields appear after you make them visible

Specifying Required Fields

If you want to specify that users must enter information into certain fields on the e*Index GUI when adding a new member profile, you can flag those fields as required using Display Configuration. Conversely, if a field is already required, you can specify that it not be required. For consistency, similar changes should be made to the e*Index e*Ways.

Use the Display
Configuration
window to specify
that certain fields
are required
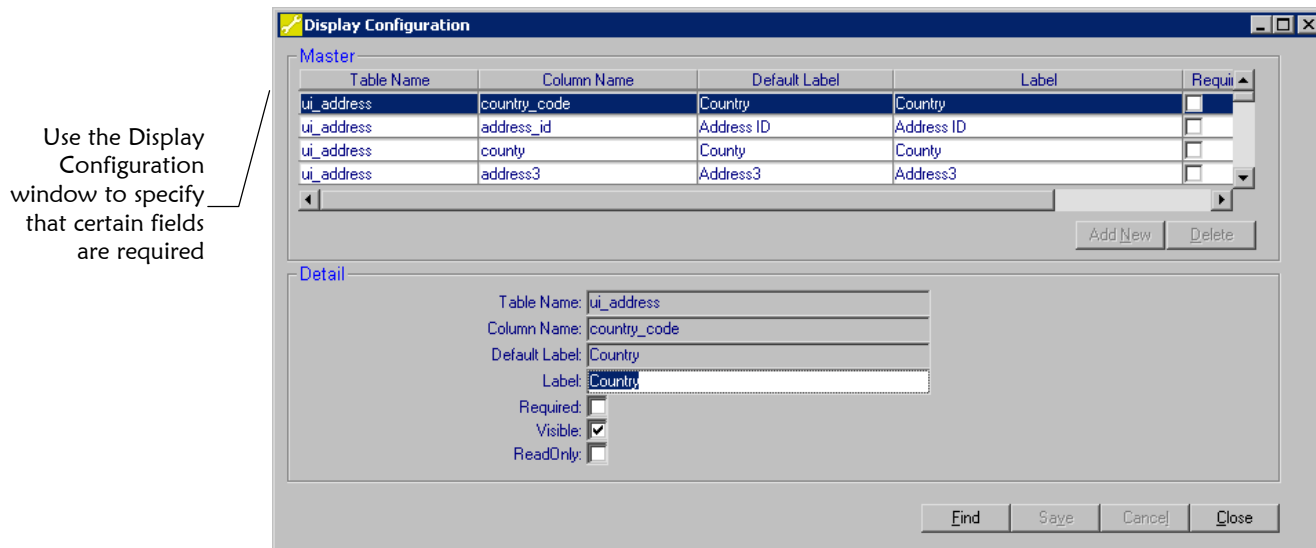
▶ **To specify required fields**

Before you begin:

✓ Determine which fields you want to flag as required for e*Index, or which required fields you want to flag as optional

Display
Configuration tool

1 On the Primary Toolbar, click **Display Configuration**. The Display Configuration window appears.

2 Perform a search for the field label you want to modify as described in "Searching for Fields in Display Configuration" earlier in this chapter. The search results appear in the display configuration list.

3 In the upper portion of the Display Configuration window, highlight the row you want to modify. The detailed information for that row appears in the lower portion of the window.

4 Do one of the following:

To flag a field as required, select the **Required** check box.

To flag a field as optional, clear the **Required** check box.

Save tool

5 On the Display Configuration toolbar, click **Save**. A confirmation dialog appears.

Confirmation dialog

Status ✕

ⓘ Record updated in database

OK

OK button
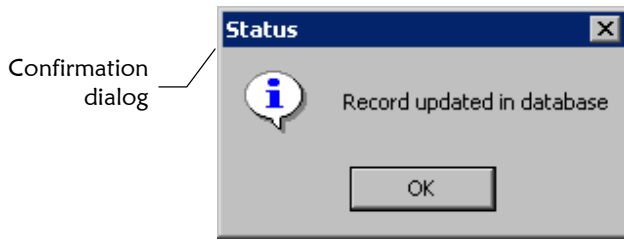
6 On the Confirmation dialog, click **OK**. The changes are saved, and the field requirements you specified appear on the e*Index windows (by shading for required fields, or no shading for optional fields).

Address Type ▾
Address1
Address2
City
State   Zip
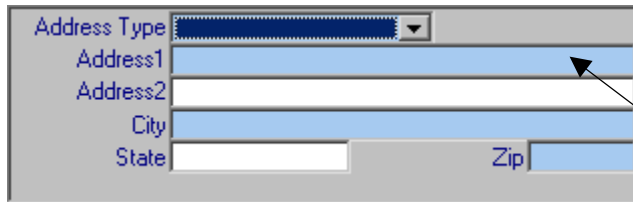
By default, the Address1 field is required (indicated by blue shading) if you add an address

Address Type ▾
Address1
Address2
City
State   Zip
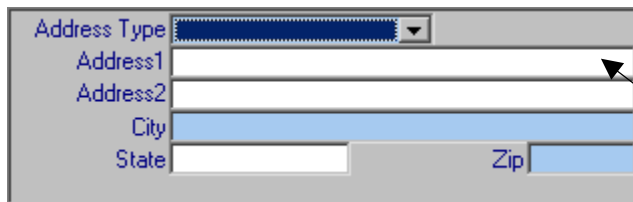
You can change the Address1 field so it is no longer required when adding an address (shading is removed)

Configuring Country-Specific Options

Overview

e*Index Administrator allows you to customize certain attributes that are unique to each country, such as national identifiers, address parsing information, tab labels for e*Index, search type titles, and so on. Before you make any modifications to the country-specific options, make sure you have performed a complete analysis of the data you will be storing, the format of that data, and the data you want to appear on the e*Index windows. The tasks you can perform on the Country Specific Option window include:

- Searching for Country-Specific Options

- Modifying Address Search Parsing Rules

- Modifying Country-Specific Field Formats

- Modifying Search Type Labels

- Specifying the Address and Phone for the Summary Page

- Modifying e*Index Tab Labels

Important! *Make sure you change the country-specific options for the country you specified in the COUNTRY control key. These are the options that configure the e*Index windows. For example, if you enter AUS for the COUNTRY control key value, be sure to change the country-specific options associated with the AUS country code.*

Searching for Country-Specific Options

The Country Specific Option window displays a list of all available country-specific attributes. There is one set of attributes for each country you can specify in the COUNTRY control key. You can perform a search to find the attributes you want to modify.

Perform a search for
the country-specific
attributes you want
to modify on the
Country Specific
Option window
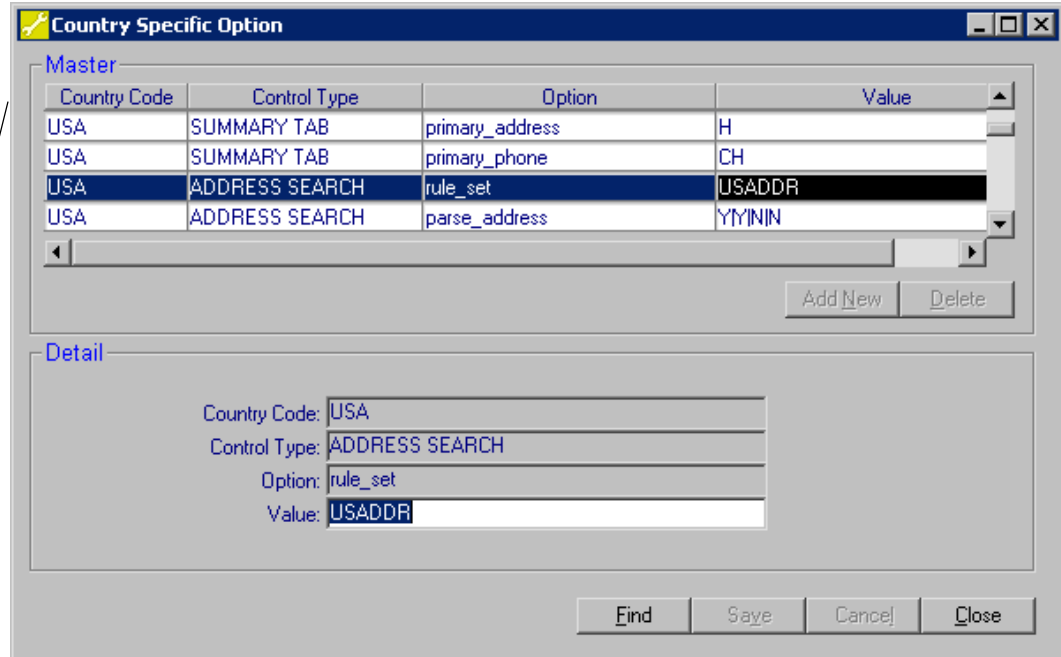
▶ To search for country-specific options

Before you begin:

    ✓ Obtain information about the country-specific attributes you want to
modify, such as the country code you are using and the name of the
option you want to modify

**Country Specific
Option tool**

1 On the primary toolbar, click **Country Specific Option**. The Country
Specific Option window appears.

Find/Retrieve tool

2 On the Country Specific Option toolbar, click **Find/Retrieve**.

3 In the lower portion of the window, enter the search criteria for the
attribute you want to modify (for more information, see "About
Country Specific Option Fields" following this procedure).

Note: Search criteria are case-sensitive.

Find/Retrieve tool

4 On the Country Specific Option toolbar, click **Find/Retrieve** again.
All rows that match the search criteria appear in the upper portion of
the window.

About Country Specific Option Fields

The Country Specific Option fields, located on the Country Specific Option window, allow you to modify a variety of attributes of the e*Index GUI. The defaults for these fields vary depending on the field label you have selected.

In this field …	type or select …
Country Code	The country code of each country-specific attribute. You should only modify the attributes associated with the country you specified in the COUNTRY control key. The settings for all other country codes are ignored.
Control Type	The type of information you are modifying. There are five control types, which correspond to e*Index attributes as follows:
	• ADDRESS SEARCH: The Vality rule set file to use for address matching.
	• GROUP LABEL: The names of the search types as displayed on the e*Index Search window.
	• COLUMN FORMAT: The format of the national identifier, telephone, and postal code fields.
	• SUMMARY TAB: The address and telephone types of the address and telephone number that appear on the Summary tab of the e*Index GUI.
	• TAB LABEL: The names of the tab headings on the tabbed pages of the e*Index GUI (such as Demographics, Local ID, Alias, and so on).
Option	The name of each country-specific attribute. This field helps you to identify the component of e*Index that will be affected by your changes.
Value	The setting of the country-specific attribute. You can configure several different types of attributes on the Country Specific Option window, so the definition of the value to enter in this field varies depending on the type of attribute you are modifying.

Modifying Address Search Parsing Rules

The address search parsing rules define the characteristics of the parsing performed on addresses in order to search against address components. You can modify these fields if you need to customize the parsing process, but make sure you have a full understanding of Vality address rule sets and parsing capabilities.

Important! *You should not change address parsing rules after data has been entered. Be sure you analyze your address searching requirements thoroughly before processing live data.*

Use the Country
Specific Option
window to modify
address parsing
rules
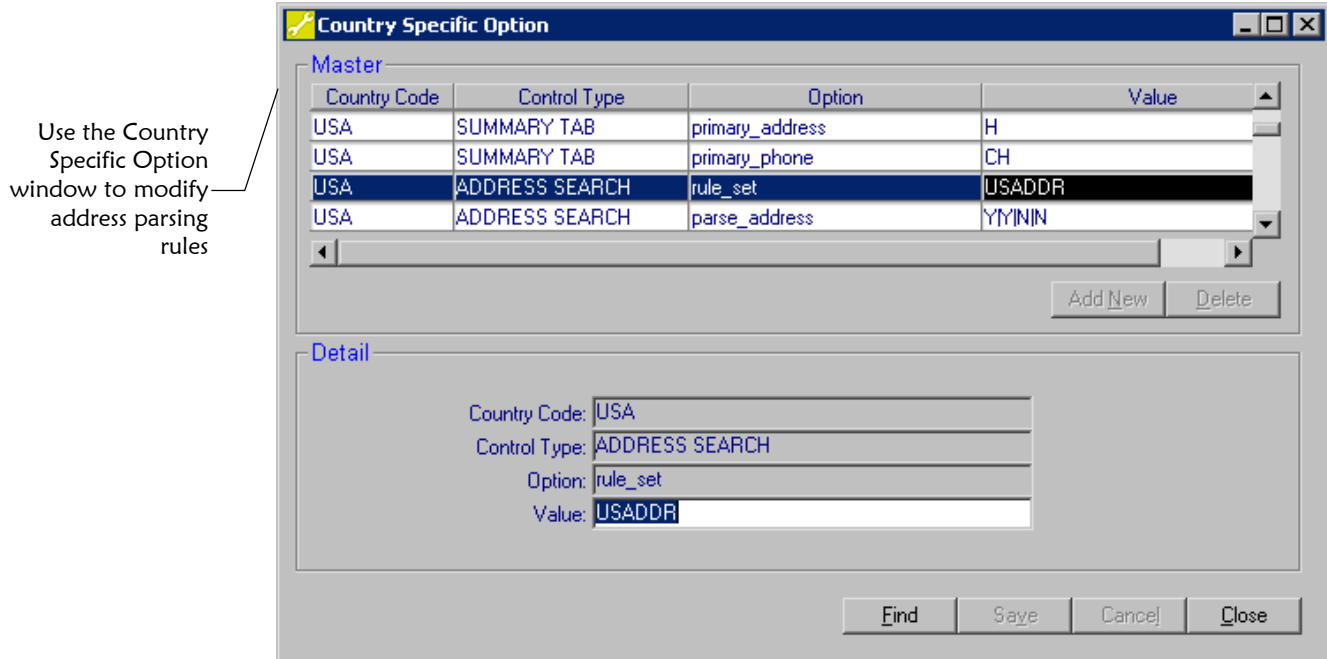
▶ To modify address search parsing rules

Before you begin:

✓ Determine your address parsing requirements (for information about the attributes you can customize, see "About Address Parsing Attributes" following this procedure)

Country Specific
Option tool

1 On the Primary Toolbar, click **Country Specific Option**. The Country Specific Option window appears.

2 Perform a search for the attributes you want to modify as described in "Searching for Country-Specific Options" earlier in this chapter. The attributes matching your criteria appear.

Tip: *Be sure to include the Country Code of the country specified in the COUNTRY control key in your search criteria. Select* ***ADDRESS SEARCH*** *as the Control Type so you only retrieve the address searching attributes.*

3 In the upper portion of the window, highlight the address parsing attribute you want to modify. The details appear in the lower portion of the window.

4   In the lower portion of the window, change the text in the **Value** field. The values you can specify are limited by many rules, depending on the attribute you choose. For more information about these values you can enter, see "About Address Parsing Attributes" following this procedure.

Save tool

5   On the Country Specific Option toolbar, click **Save**. A confirmation dialog appears.

Confirmation dialog

Status

Record updated in database

OK

OK button
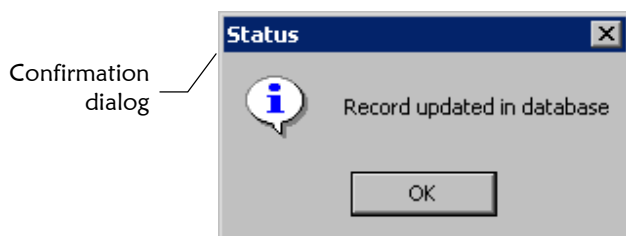
6   On the Confirmation dialog, click **OK**. The changes are saved, and formats now appear as specified on the e*Index windows.

About Address Parsing Attributes

The address parsing attributes on the Country Specify Option window allow you to customize the parsing rules for the address matching capabilities of the matching algorithm. Make sure you have a complete understanding of Vality rule set files before modifying any of these fields. You should not modify these fields after you start processing data.

For this option…	specify this value …
rule_set	The rule set you want to use for address matching. Typically, you should use the default rule set since it is tailored for each country.
	Important! Make sure that the rule set you specify is marked as "In Use" on the Rule Set Maintenance window (for more information, see "About Rule Set Summary Fields" in Chapter 6 of this guide).
parse_address	Indicators that specify which address lines are concatenated and sent to the matching algorithm for parsing. The format for this value is **X|X|X|X**, where **X** is a variable representing either **Y** for yes, or **N** for no. The values you specify indicate whether to use the Address1, Address2, Address3, or Address4 fields (in that order). For example, you would enter **Y|Y|N|N**, to indicate that Address1 and Address2 are set for parsing, but Address3 and Address4 are not.

For this option…	specify this value …
house_number	Indicators that specify to the matching algorithm what to parse for the house number and how to parse it. The values you can enter in this field correspond with the field name abbreviations listed in the .DCT for the rule set you specified in **rule_set**.
street_name	Indicators that specify to the matching algorithm what for parse as the street name and how to parse it. The values you can enter in this field correspond with the field name abbreviations listed in the .DCT for the rule set you specified in **rule_set**.
street_dir	Indicators that specify to the matching algorithm what to parse for the street direction and how to parse it. The values you can enter in this field correspond with the field name abbreviations listed in the .DCT for the rule set you specified in **rule_set**.
street_type	Indicators that specify to the matching algorithm what to parse for the street type (such as avenue, street, and so on) and how to parse it. The values you can enter in this field correspond with the field name abbreviations listed in the .DCT for the rule set you specified in **rule_set**.
street_name_ phonetic	The type of phonetic code to store in the *ui_address* table for searching. We do not recommend modifying this value. If you do change this value, make sure to modify the .PAT and .DCT files for the corresponding rule set file accordingly.

Modifying Country-Specific Field Formats

You can modify the format in which certain GUI fields are displayed. The fields whose format you can modify include SSN, Phone, and Zip Code. Using the Display Configuration option, you can also modify the field labels for these fields to represent the type of data you store. For example, you may want to change **Zip Code** to **Post Code**, or **Social Security Number** to **NHS Number**. For more information about modifying field labels, see "Modifying Field Labels" earlier in this chapter).

Use the Country
Specific Option
window to modify
the format of
certain fields
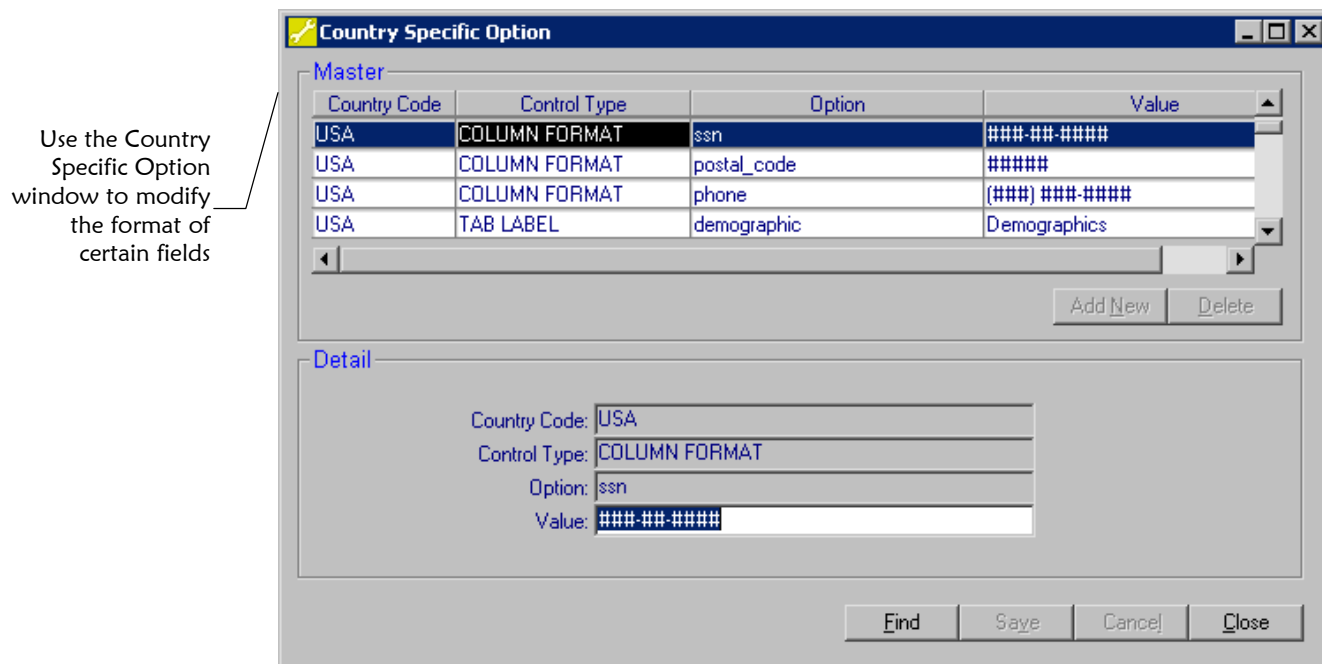
▶ To modify country-specific field formats

Before you begin:

  ✓ Determine the formats you need to use for the Social Security Number, Phone, and Zip Code fields

Country Specific Option tool

1 On the Primary Toolbar, click **Country Specific Option**. The Country Specific Option window appears.

2 Perform a search for the attributes you want to modify as described in "Searching for Country-Specific Options" earlier in this chapter. The attributes matching your criteria appear.

Tip: Be sure to include the Country Code of the country specified in the COUNTRY control key in your search criteria. Select **COLUMN FORMAT** as the Control Type so you only retrieve the formatting attributes.

3 In the upper portion of the window, highlight the field formatting attribute you want to modify. The details appear in the lower portion of the window.

4   In the lower portion of the window, enter the new format in the
Value field. The values are governed by these rules:

- **!** – Indicates that upper-case, alphanumeric characters are allowed
  in the field.

- **#** - Indicates that only numeric characters are allowed in the field.

- You can insert separators, such as parenthesis, dashes, periods,
  and so on that will appear in the field on the e*Index GUI. For
  example, if you enter **###-##-##** for a field format, then e*Index
  users can only enter numbers into the field, and the numbers they
  enter are automatically formatted in this manner: **123-45-67**.

Save tool

5   On the Country Specific Option toolbar, click **Save**. A confirmation
dialog appears.

Confirmation
dialog

Status

Record updated in database

OK

OK button
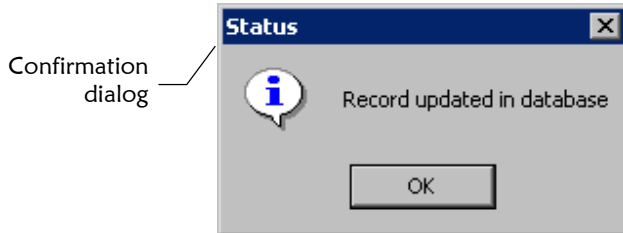
6   On the Confirmation dialog, click **OK**. The changes are saved, and
the formats now appear as specified on the e*Index windows.

Modifying Search Type Labels

You can change the titles of the different search types on the Search page of the
e*Index Search window. For example, if you only store account numbers as non-
unique IDs, you could change the name of the Other ID search box to **Account
Number**. You can then change the field names accordingly using the Display
Configuration function (for more information, see "Modifying Field Labels"
earlier in this chapter).

Use the Country Specific Option window to modify search type labels
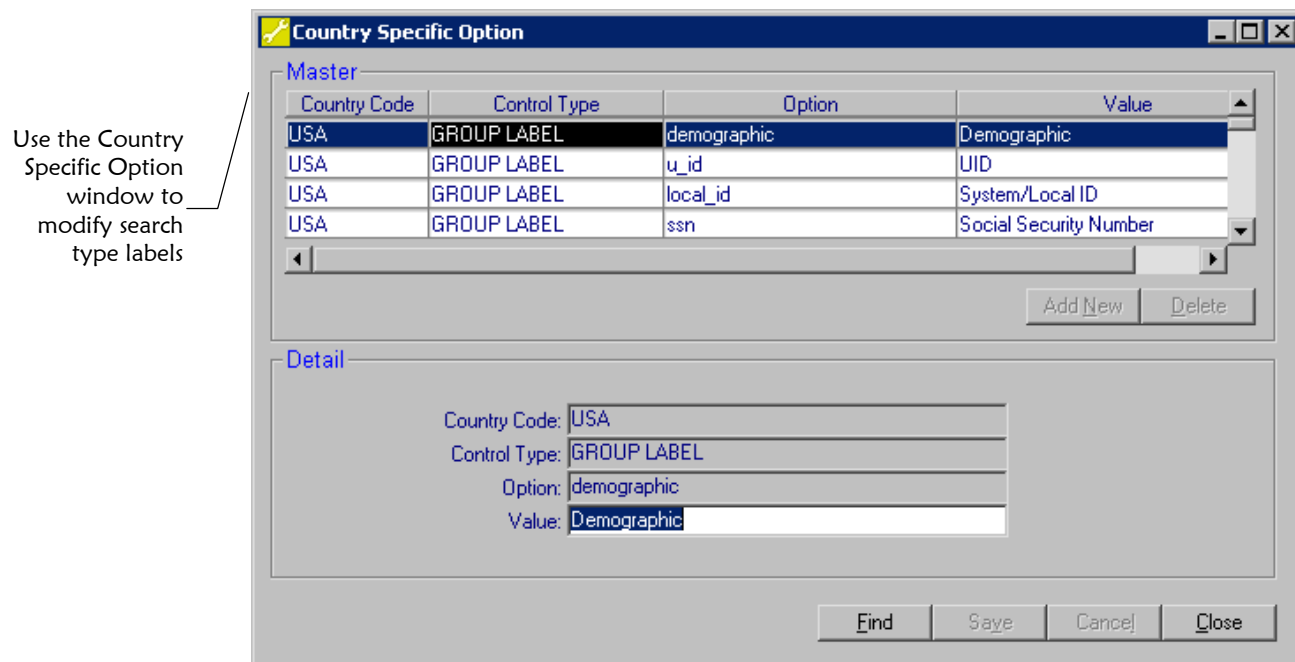
▶ **To modify search type labels**

Before you begin:

    ✓   Determine the names you want to use for the search type labels. The default search types are UID, Demographic, Social Security Number, System/Local ID, and Other ID.

Country Specific Option tool

1   On the Primary Toolbar, click **Country Specific Option**. The Country Specific Option window appears.

2   Perform a search for the attributes you want to modify as described in "Searching for Country-Specific Options" earlier in this chapter. The attributes matching your criteria appear.

Tip: *Be sure to include the Country Code of the country specified in the COUNTRY control key in your search criteria. Select* ***GROUP LABEL*** *as the Control Type so you only retrieve the search type attributes.*

3   In the upper portion of the window, highlight the label you want to modify. The details appear in the lower portion of the window.

4   In the lower portion of the window, change the text in the **Value** field. The text you type appears as the title of the selected labeled box on the e*Index Search window. For example, if you change the value of the aux_id option from Other ID to Account Number, the search box originally titled **Other ID** will be titled **Account Number**.

By default, the title of
this labeled box is

Other ID
Other ID Name ACCOUNT NUMBER   ID 82-37-4029

When you change a
GROUP LABEL value, the
title of the corresponding
labeled box changes

Account Number
Account Name MIDLAND   Account Number 293-87-420

Save tool

5   On the Country Specific Option toolbar, click **Save**. A confirmation
dialog appears.

Confirmation
dialog

Status

Record updated in database

OK
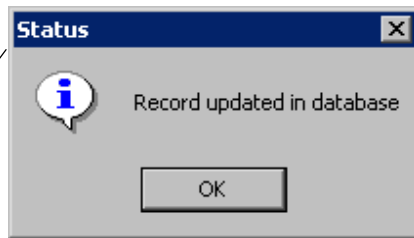
OK button

6   On the Confirmation dialog, click **OK**. The changes are saved, and
the labeled boxes on the e*Index Search window reflect the changes.

Specifying the Address and Phone for the Summary Page

If you display the Summary page (that is, if the PVSUMMARY control key is set
to **Y**), only one address and one telephone number appear on the page. You can
specify which address type and phone type to display on the Summary page
using the Country Specific Option function. By default, the home address and
home telephone number are displayed.

Use the Country Specific Option window to specify the address and phone type for the Summary page
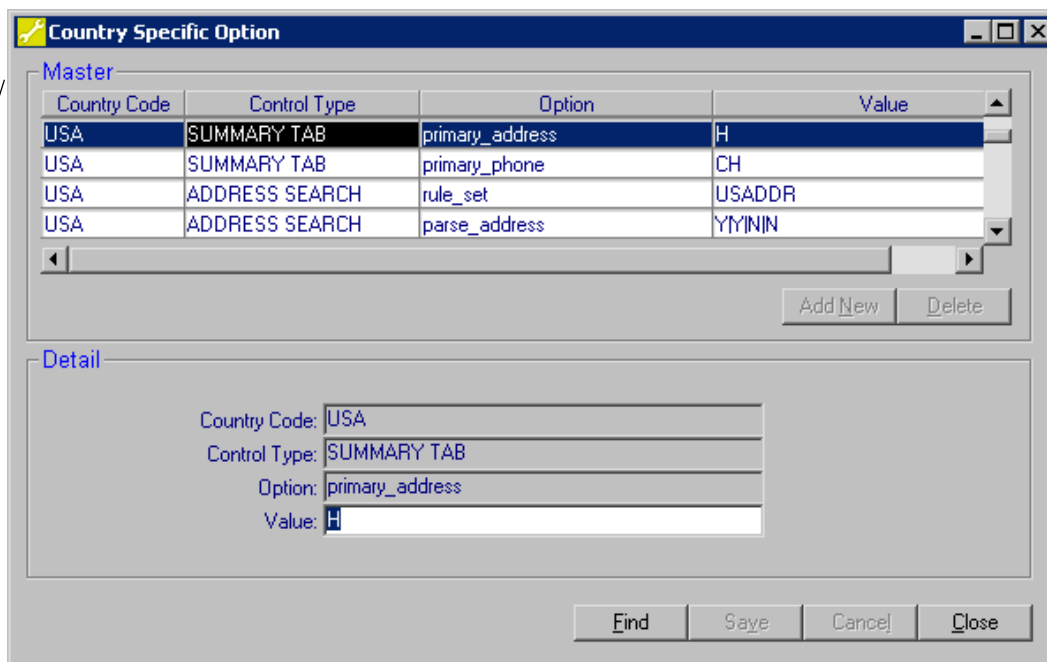
▶ To specify the address and phone for the Summary page

Before you begin:

✓ Determine the address and phone type you want to display on the Summary page of the e*Index View/Edit Person window

Country Specific Option tool

1 On the Primary Toolbar, click **Country Specific Option**. The Country Specific Option window appears.

2 Perform a search for the attributes you want to modify as described in "Searching for Country-Specific Options" earlier in this chapter. The attributes matching your criteria appear.

*Tip: Be sure to include the Country Code of the country specified in the COUNTRY control key in your search criteria. Select **SUMMARY** TAB as the Control Type so you only retrieve the address and phone type attributes.*

3 In the upper portion of the window, highlight the Summary page attribute you want to modify. The details appear in the lower portion of the window.

4 In the lower portion of the window, change the text in the **Value** field by entering the code of the address or phone type you want to display.

*Tip: If you don't know the code to enter, you can view a list of address types and their corresponding codes in the Common Table Maintenance function by viewing the properties for **Address Type**. View the properties for **Phone Type** to view a list of phone types and their corresponding codes.*

Save tool

5 On the Country Specific Option toolbar, click **Save**. A confirmation dialog appears.

Confirmation dialog

Status

Record updated in database

OK
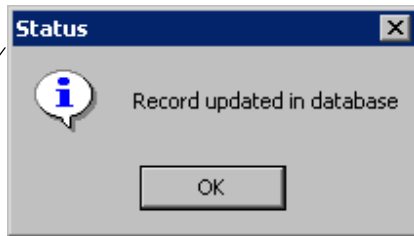
OK button

6 On the Confirmation dialog, click **OK**. The changes are saved, and the Summary page reflects the changes you made.

Modifying e*Index Tab Labels

In e*Index, member information appears on a series of tabbed pages. The default tabs are Summary, Demographics, Miscellaneous, Addresses, Phones, Aliases, Local IDs, Other IDs, and Comments. If you modify field labels using the Display Configuration functions, you may want to change the tab headings to reflect the type of information that appears on each tabbed page.

Use the Country Specific Option window to modify tab heading labels

Country Specific Option

Master

Country Code	Control Type	Option	Value
USA	TAB LABEL	demographic	Demographics
USA	TAB LABEL	miscellaneous	Miscellaneous
USA	TAB LABEL	address	Addresses
USA	TAB LABEL	phone	Phones

Add New   Delete

Detail

Country Code: USA
Control Type: TAB LABEL
Option: demographic
Value: Demographics

Find   Save   Cancel   Close
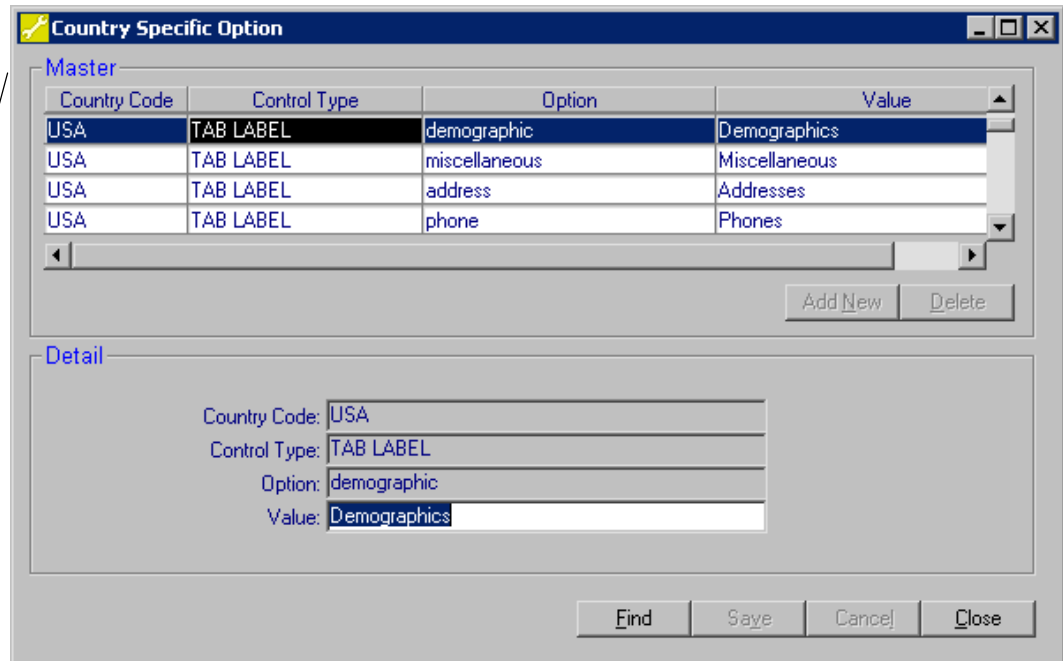
▶ To modify e*Index tab labels

Before you begin:

✓ Determine the names you want to use for the tab labels on the e*Index windows

Country Specific Option tool

1 On the Primary Toolbar, click **Country Specific Option**. The Country Specific Option window appears.

2 Perform a search for the attributes you want to modify as described in "Searching for Country-Specific Options" earlier in this chapter. The attributes matching your criteria appear.

---

*Tip: Be sure to include the Country Code of the country specified in the COUNTRY control key in your search criteria. Select **TAB LABEL** as the Control Type so you only retrieve the tab label attributes.*

---

3 In the upper portion of the window, highlight the tab label you want to modify. The details appear in the lower portion of the window.

4 In the lower portion of the window, change the text in the **Value** field. The text you type appears as the title of the selected tab heading on the e*Index windows. For example, if you change the value of the **Miscellaneous** tab to **Membership**, the new name appears on the e*Index member windows.

By default, the name of this tab is **Miscellaneous**

Miscellaneous		
String 1 JWARREN@HERE.ORG	String 4 BETTY MARKS	As of: 12/01/1997
String 2 2348-23439	String 5 YES	Date 2 12/15/1997
String 3 BRIAN SHATFIELD	String 6 EAST	Date 3 02/01/2000
		Date 4 00/00/0000
		Date 5 00/00/0000
String 7		
String 8		
String 9		
String 10		

When you modify a TAB LABEL attribute, the changes appear on the e*Index windows (the image displays field label customizations as well)

Membership		
E-mail JWARREN@HERE.ORG	Referral BETTY MARKS	Activation 12/01/1997
Account No. 2348-23439	Notify YES	First Order 12/15/1997
Account Rep. BRIAN SHATFIELD	Region EAST	Last Order 02/01/2000

Save tool

5 On the Country Specific Option toolbar, click **Save**. A confirmation dialog appears.

Confirmation dialog

Status ☒

(i) Record updated in database

OK
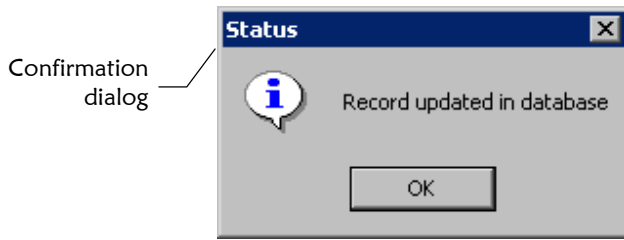
6 On the Confirmation dialog, click **OK**. The changes are saved, and the tab headings on the e*Index windows reflect the changes.

OK button

Configuring Queries

Overview

The Configurable Query function allows you to modify the default queries defined for phonetic searches from the GUI and for the candidate selection process that searches for potential duplicates when member profiles are inserted or updated in the database. Follow these steps to customize the queries to your processing needs.

- Step1: Determine Your Query Requirements

- Step 2: Select the Type of Query to Customize

- Step 3: Specify the Columns for the Query

- Step 4: Name the Criteria List

- Step 5: Specify the Tables for the Query

- Step 6: Specify the Search Criteria

- Step 7: Test and Save the Query

Important!

- *These procedures are optional. You do not need to make any modifications in order to run e*Index. These procedures should **only** be performed by an administrator who is familiar with the format of the queries and how they relate to the Vality rule set files.*

- *You must have a strong knowledge of the SQL Query language before making any modifications to the configurable queries. You should also be familiar with the e*Index database structure. For more information about database tables, or to see a data model of the e*Index database, see the* e*Index Global Identifier Technical Reference.

- *Changing the configurable query attributes while e*Index is running (either the GUI or e*Ways) may cause inconsistent results in the e*Index database. In addition, changing the queries after records have already been processed will not change how those records were processed. This may also result in some inconsistencies between old and new records.*

Step1: Determine Your Query Requirements

Before you make any changes to the default queries, perform a thorough analysis of your data to determine the type of information you will be processing and the combinations of that data that will provide the most reliable information for matching member profiles. Make sure you have an understanding of how the queries operate with the matching algorithm, and how the queries correlate with the rule set files. Your SeeBeyond project manager can help you determine the appropriate configuration for your system.

Step 2: Select the Type of Query to Customize

Default criteria are provided for the query used to perform a phonetic search and for the query used when evaluating possible matches and potential duplicates. You cannot add new queries, but you can modify the existing queries if needed. Before you can modify a query, you need to select the query type you want to modify.

Use the Configurable Query window to select a configurable query type to modify

▶ **To select the type of query to customize**

Before you begin:

✓ Complete "Step1: Determine Your Query Requirements"

**Configuration
Query tool**

1 On the Primary toolbar, click **Configuration Query**. The
Configurable Query window appears.

2 In the **Type** field, do one of the following:

*To modify the query used to evaluate possible matches and potential
duplicates*, select **Person Query – Default Search**.

To modify the query used for phonetic searches, select **Person Query –
Phonetic Search**.

Retrieve button

3 Click the **Retrieve** button. The criteria for the query currently defined
for the type you selected appears in the Configurable Query window.

---

*Note: Before continuing, you may want to review the information under
"What is Configurable Candidate Selection (CSS)?" earlier in this chapter
and "About Configurable Query Sections" following this procedure. These
topics provide background information that may help you modify your
queries.*

---

4 Continue to "Step 3: Specify the Columns for the Query".

About Configurable Query Sections

The sections located on the Configurable Query window allow you to specify
certain information about the database queries used for phonetic searching and
potential duplicate evaluation. e*Index uses the information from all of the
sections on the Configurable Query window to create the SQL statement used to
query the database for phonetic searches and potential duplicate evaluation.

Section Name	Description
Type	This section allows you to specify which query to display. Select **Person Query – Default Search** to display the potential duplicate query for both the GUI and backend. Select **Person Query – Phonetic Search** to display the query for a phonetic search.

Section Name	Description
Select Column	This section allows you to select the columns in the e*Index database tables that will be used in the displayed query. The **Available Columns** list displays all of the columns you can select from in a query. The **Selected Columns** list displays all of the columns currently selected for the query and whether each column is used for weighted matching. The columns in the Selected Columns list for the Phonetic Query appear on the search results window after a phonetic search is performed. The columns selected for Matching for both types of query form the data string that is passed to the Vality matching algorithm, so these columns must also be defined in the rule set file **UI.dct**.
	For the Phonetic Query, you can select a column that does not appear on the Standard Search page, but you need to hard code the value for that field in the WHERE clause.
	Important! *The column u_id must be selected for both types of query (with **Matching** not selected unless you modify the Vality rules file accordingly). Only specify that a column be used for matching if the corresponding column is listed in the **UI.dct** file.*
Criteria List	This section allows you to create short descriptions of each WHERE clause that you create for the query. For each description you create, you must also create a WHERE clause in the lower portion of the window.
	Tip: *When e*Index performs either type of query, it forms the queries based on the criteria combinations you specify and in the order you specify in the criteria list. For example, if the first item in the list is first name plus last name, and the second item is SSN, e*Index first searches for matches on first and last names and then searches for matching SSNs.*
From	The From section allows you to select the tables in the e*Index database to be used in the displayed query. The **Available Tables** list displays all of the tables you can use in a query. The **Selected Table Names** list displays all of the tables that are currently selected for the query, along with their alias names if any.
Where Clause	You can define the WHERE clause of the SQL statement for the query in this section. For each description you add to the criteria list, you must also add a WHERE clause. You should have a strong knowledge of the SQL Query language and the e*Index database before making any changes to this portion of the window. Each WHERE clause must have at least one Attribute entry.

Step 3: Specify the Columns for the Query

To begin formulating the SQL select statement for the query, you need to specify the database columns you want to use in the query. You can select the columns from a list of available columns. For optimization, the columns selected for the configurable query should be indexed. If you select columns for the configurable query that are not indexed, be sure to create those indexes after you modify the query. The query should always include the first and last name fields.

Use the Select Column section of the Configurable Query window to specify the columns to use in the SQL statement
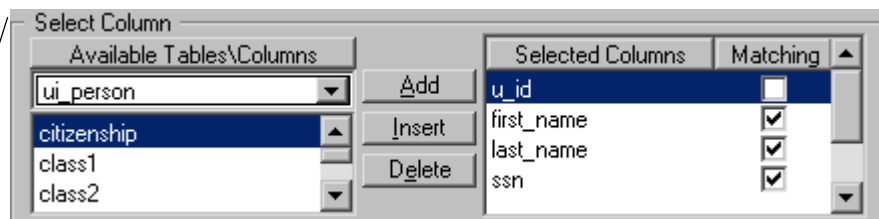
▶ **To specify the columns for the query**

Before you begin:

✓ Complete "Step 2: Select the Type of Query to Customize"

✓ Review the information for **Select Column** under "About Configurable Query Sections" beginning on page 5-47

✓ For the phonetic search, be sure to only include columns that have corresponding fields on the e*Index Search window (or users will be unable to perform a phonetic search)

1 In the Select Column section of the window, view a list of columns that are available for the queries and a list of columns that are already in use. You can perform any of the following steps in this section.

Add button

2 To add a new column to the end of the **Selected Columns** list, highlight the name of the new column in the **Available Columns** list, and then click the **Add** button in the Select Column section. The column appears at the end of the **Selected Columns** list.

3 To add a new column before a specific column in the **Selected Columns** list:
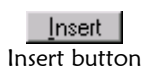
- In the **Selected Columns** list, highlight the name of the column before which you want to place the new column.

Insert button

- In the **Available Columns** list, highlight the name of the column you want to add.

- In the Select Column section, click **Insert**. The new column appears in the **Selected Columns** list above the highlighted entry.
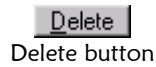
Delete *button*

4 To remove a column from the **Selected Columns** list, highlight the name of the column in the **Selected Columns** list, and then click **Delete** in the Select Columns section. The column is removed from the list.

5 To specify that a column in the **Selected Columns** list be used for Vality matching, select the corresponding checkbox in the **Matching** column.

---

*Important! The column **u_id** from the* ui_person *table must be selected for both types of query. Do not select **Matching** for this column unless you modify the Vality rules file accordingly. You should only specify that a column be used for matching if the corresponding column is specified for matching in the Vality rules file (*.rul). The columns you can select are limited to* ui_person_search_view *and* ui_person_view *only.*

---

6 Continue to "Step 4: Name the Criteria List

Step 4: Name the Criteria List

Before you define each "where" clause for the selected query, you need to name each clause and specify the order in which each data combination is searched. e*Index searches for criteria combinations in the order specified in the Criteria List.

Use the Criteria List section of the Configurable Query window to name each criteria set

Criteria List
FirstNameP+DOB+Gender
LastNameP+FirstNameP
LastNameP+MotherMN

New
Delete
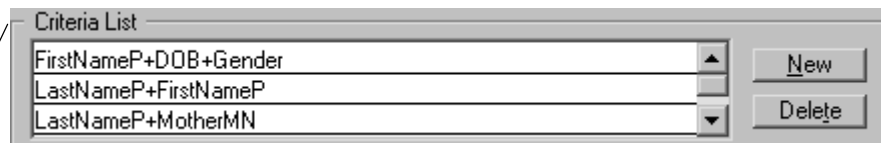
▶ **To name the criteria list**

Before you begin:

✓ Complete "Step 3: Specify the Columns for the Query"

✓ Review the information for **Criteria List** under "About Configurable Query Sections" beginning on page 5-47

1 In the Criteria List section, view descriptions of the search criteria defined in the Where Clause section. You can perform any of the following steps in the Criteria List section.

Delete *button*

2 To remove a description from the Criteria List, select the description you want to remove, and then click the **Delete** button in the Criteria List section.

3   To modify an existing description in the Criteria List**,** select the description you want to modify, and then type in any text you choose. You should enter a description that helps you to easily determine the associated criteria combination as defined in the Where Clause section.

New

New button

4   To insert a description into the Criteria List, click the **New** button in the Criteria List section. In the blank row that appears, type a brief description of the criteria you want to include.

Note: *If you add a new description to the criteria list, you need to define the WHERE clause for that description in the Where Clause section at the bottom of the window (see "Step 6: Specify the Search Criteria" later in this section).*

---

5   Continue to "Step 5: Specify the Tables for the Query".

Step 5: Specify the Tables for the Query

Once you name the criteria lists for the query, you can specify which database tables to use in the "from" clause of the SQL statement. Look through the Available Tables list in the From section of the Configurable Query window to see a list of tables from which you can choose.

Use the From section on the Configurable Query window to specify the database tables to use in each query
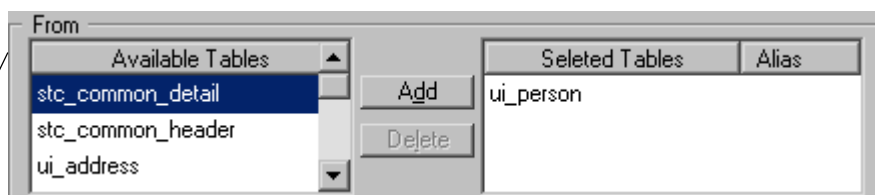
▶ **To specify the tables for the query**

Before you begin:

✓   Complete "Step 4: Name the Criteria List"

✓   Review the information for **From** under "About Configurable Query Sections" beginning on page 5-47

1   In the From section, view the tables you can use for the query. You can perform any of the following steps in this section.

Add

Add button

2   To add a new table to the query, highlight the appropriate table name in the **Available Tables** list, and then click the **Add** button in the From section of the window. The new table appears in the **Selected Tables** list

Delete button

3   To remove a table from the query, highlight the appropriate table in the **Selected Tables** list, and then click the **Delete** button in the From section. The table you highlighted is removed from the **Selected Tables** list.

4   To create an alias for a table in the query, highlight the appropriate table in the **Selected Tables** list, and then press the **Tab** key. Type the alias name you want to use for the table.

> *Note: An alias is an abbreviation for a table name that can make SQL statements easier to write and read. For more information about table aliases, refer to the appropriate SQL documentation.*

5   Continue to "Step 6: Specify the Search Criteria".

Step 6: Specify the Search Criteria

Using the information you already specified, you can create the search criteria for each criteria list description you created. You define the search criteria in the Where Clause section of the Configurable Query window. Construct the "where" clause using the tables and columns you selected in the previous steps.

Use the Where Clause section of the Configurable Query window to define each set of search criteria for the query

Where Clause

```
(fname_phonetic_code = <FNAME_PHONETIC_CODE> and dob =
<DOB> and sex = <SEX> and status = 'A')
```
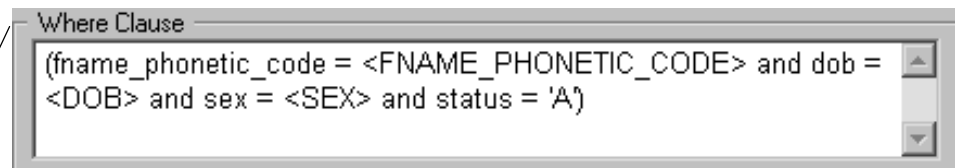
▶ **To specify the search criteria**

Before you begin:

✓   Complete "Step 5: Specify the Tables for the Query"

✓   Review the information for **Where Clause** under "About Configurable Query Sections" beginning on page 5-47

1   In the Where Clause section of the window, you can view, modify, add, and delete the "where" clauses that correspond with the descriptions in the Criteria List section. Perform any of the following steps in the Where Clause section.

2   To define a "where" clause:

•   In the Criteria List section, highlight the description for which you want to define a WHERE clause.

- In the Where Clause section, type the WHERE clause that corresponds with the selected description in the Criteria List. Use standard SQL Query language.

3   *To modify an existing "where" clause:*

- In the Criteria List section, highlight the description for which you want to modify the existing "where" clause.
- In the Where Clause section, modify the criteria as necessary, using standard SQL Query language.

Note: *You can either type the WHERE clause in freehand, or you can right-click in the Where Clause section to select from the available columns and attributes. Each WHERE clause must have at least one attribute entry.*

4   Continue to "Step 7: Test and Save the Query".

Step 7: Test and Save the Query

Once you have modified the selected query, you can validate the criteria to ensure that the information is correct. Once the information is verified, you need to save the changes.

When you finish modifying the query, verify and save the data

▶ **To test and save the query**

Before you begin:

    ✓ Complete "Step 6: Specify the Search Criteria"

Verify button

1 When you finish changing the query, click **Verify** to make sure the changes you made to the query are valid.

2 If you receive an error, review the query, make any necessary modifications, and then click **Verify** again. Repeat this step until the message **Query is OK** appears.

OK button

3 To save the changes to the query, click **OK** in the lower portion of the Configurable Query window.

Configuring Extensive Searching

The default configurable query does not include extensive searching for phonetic searches or for the searches used to evaluate potential matches. If you want to enable extensive searching, you need to make the following modifications to the configurable queries. Note that extensive searching for alphanumeric searches from the GUI is controlled by the EXTNSVSRCH control key.

▶ **To configure extensive searching for phonetic searches**

Before you begin:

    ✓ Make sure you have reviewed and understand the instructions for modifying the configurable query Configuring Queries

    ✓ Make sure the EXTNSVSRCH control key is set to **Y** for consistency

Configuration Query tool

1 On the Primary toolbar, click **Configuration Query**. The Configurable Query window appears.

2 In the type field, select **Person Query – Phonetic Search**.

Retrieve button

3 Click the **Retrieve** button. The criteria for the query currently defined for the phonetic search appear in the Configurable Query window.

New button

4 In the Criteria List section, click **New**. An empty row appears at the bottom of the criteria list.

5 In the new row, type a name for the extensive search criteria.

6   In the Where Clause section, type the following SQL code:

> **u_id in (select u_id from ui_alias_view where lname_phonetic_code = <LNAME_PHONETIC_CODE> and fname_phonetic_code = <FNAME_PHONETIC_CODE>) and status = 'A'**

7   Test and save the query as described in "Step 7: Test and Save the Query" earlier in this section.

▶ **To configure extensive searching for candidate selection searches**

Before you begin:

✓   Make sure you have reviewed and understand the instructions for modifying the configurable query Configuring Queries

✓   Make sure the **EXTNSVSRCH** control key is set to **Y** for consistency

Configuration
Query tool

1   On the Primary toolbar, click **Configuration Query**. The Configurable Query window appears.

2   In the type field, select **Person Query – Default Search**.

Retrieve button

3   Click the **Retrieve** button. The criteria for the query currently defined for the default search appear in the Configurable Query window.

New button

4   In the Criteria List section, click **New**. An empty row appears at the bottom of the criteria list.

5   In the new row, type a name for the extensive search criteria.

6   In the Where Clause section, type the following SQL code:

> **u_id in (select u_id from ui_alias_view where lname_phonetic_code = <LNAME_PHONETIC_CODE> and fname_phonetic_code = <FNAME_PHONETIC_CODE>) and status = 'A'**

7   Test and save the query as described in "Step 7: Test and Save the Query" earlier in this section.

Configuring the Matching Algorithm

About this Chapter

Overview

This chapter describes the Rule Set Maintenance function for e*Index and explains how to customize the rule sets used by the Vality® INTEGRITY™ matching algorithm to identify and match member records.

The following diagram illustrates the contents of each major topic in this chapter.

About Vality and e*Index — Learn about the Vality matching algorithm and how it is used by e*Index

About e*Index Rule Sets — Learn about the rule sets provided by e*Index

Rule Set Maintenance — Learn about the functions you can perform to maintain rule set information for e*Index

Maintain Rule Sets — Learn how to create and modify rule set information, and to load new rule set files

Maintain Rule Set Files — Learn how to add, delete, and modify rule set files for the e*Index rule sets

About Vality INTEGRITY and e*Index

Overview

This section of the chapter provides background information about the Vality INTEGRITY matching algorithm and the rule sets that provide the business rules for the matching logic.

About the Vality INTEGRITY Matching Algorithm

The Vality INTEGRITY matching algorithm uses a proven methodology to process and weight member records in the e*Index database. This methodology includes four steps: investigation, conditioning, matching, and survivorship. The investigation step is generally performed before data is loaded into the e*Index database, and enables you to determine data anomalies, invalid or default values, and the frequency of certain values.

The following three steps occur when two records are analyzed for matching probability. The conditioning step for e*Index includes standardizing the first name fields and applying phonetic codes if necessary. During the matching step, the match fields are analyzed and weighted according to the rules set forth in the rules file (**UI.RUL**). The weights for each field are combined to determine the overall matching weight for the two records. Finally, survivorship is determined based on how the overall matching weight compares to the duplicate and matching thresholds set for e*Index (for more information, see "DUPTHRES" and "MATCHTHRES" in chapter 5 of this guide).

About e*Index Searching and Matching

When a new record is passed to the e*Index database, e*Index first selects a subset of possible matches from the database. e*Index then uses the INTEGRITY matching algorithm to assign a matching probability weight for each record in this subset (known as the *candidate selection pool*).   To create the candidate selection pool, e*Index by default makes four passes of the existing data, searching for matches on specific combinations of data. The passes search the following data combinations in the order given:

■ Phonetic first name + sex + dob

■ Phonetic last name + phonetic first name

■ Phonetic last name+ mother's maiden name

■ Social security number (SSN)

Note that you can modify these criteria by modifying the Configurable Query (see "Configuring Queries" in chapter 5 of this guide).

By default, matching is performed on five data elements: first name, last name, date of birth, SSN, and gender. Each data element is assigned a matching weight. Before matching on the first name, e*Index standardizes the first name based on information contained in the file **UI.TBL** (this information is also contained in the database in the table *ui_nickname*). The weights for each data element are totaled to determine the matching probability weight for the entire record. You can customize how each data element is weighted, and you can customize the data elements on which matching is performed.

About Rule Sets

A *Vality rule set* is a group of files that together define how the INTEGRITY matching algorithm processes records to assign the matching probability weights that help to identify matches and potential duplicates within the e*Index system. The processing logic in the rule set files determines how fields in incoming records are parsed and classified for processing and how the records are then weighted. Rule sets are flexible, allowing you to customize processing logic that determines how fields in transaction records are processed to determine matches, potential duplicates, and non-matches.

A rule set must have at least three files: a pattern rules file, a classification file, and a match key dictionary.   You can also add optional files to the rule set. e*Index uses three optional files: a rules file, a table file, and a standardization file.   Another optional file you may want to use is a frequency file, which allows you to assign lower matching weights to common names and higher matching weights to rare names. Rule sets parse incoming records by their key matching elements. The default elements for e*Index elements are last name, first name (which becomes standardized), date of birth, gender, and SSN.

Matching Weight Formulation

Vality determines the matching weight of a person record by comparing each match key field (specified in **UI.RUL**), taking into account the matching (m) and unmatching (u) probabilities and the matching logic you have specified for each field, and then using the algorithm to arrive at a match weight for each match key field. The weights for each match key field are then summed together for a total, composite matching weight.

Using m and u probabilities, you can specify the fields that provide the most reliable matching information. For example, the gender field is not as reliable as the SSN field for determining a match since a person's SSN is more specific. The more reliable the field, the greater the m probability for that

field should be. If a field matches between two records, an agreement weight, determined by a logarithmic formula using the m and u probabilities, is added to the composite weight. If the fields disagree, a disagreement weight is subtracted from the composite weight.

Vality and the Configurable Query

The Vality rule set files and the e*Index Configurable Query are closely linked in the search and matching processes. The configurable query defines the select statements for phonetic queries and for creating the candidate selection pool during the search process. The query also creates the the string that is passed to Vality for match processing. This string is defined in the Selected Columns section of the configurable query. Each selected column that is selected for matching is added to the string that is passed to the matching algorithm.

Columns selected for matching are passed into the Vality matching algorithm
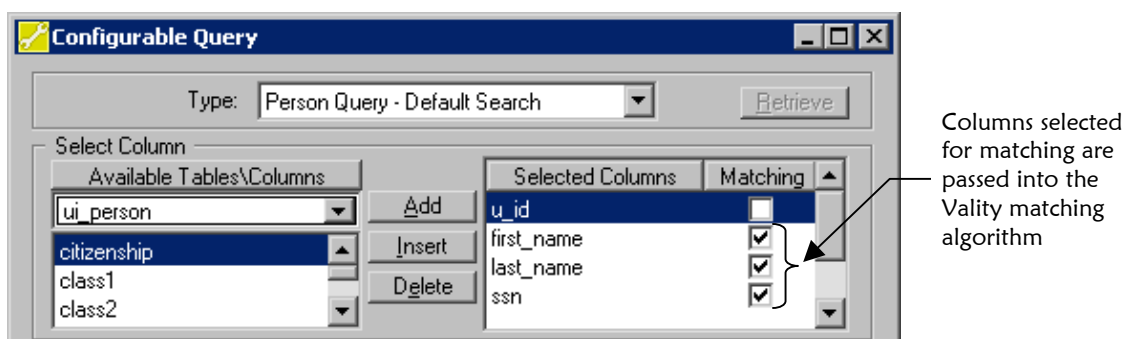
Because of the inter-relationship between the Vality rule set and the configurable query, it is very important that if you modify the matching fields for one, you modify the matching fields for the other in the same manner. For example, if you add "Marital Status" as a match field in the configurable query, you need to add the field to the **UI.dct** file and possibly the **UI.rul** and **UI.pat** files as well. Conversely, if you want to add "Suffix" as a match field in **UI.rul**, you also need to add "Suffix" to **UI.pat**, **UI.dct**, and the configurable query.

Learning About e*Index Rule Sets

Overview

This section of the guide describes rule sets and the tasks you can perform to customize e*Index rule sets to meet processing requirements.

Note: This chapter is intended for readers who are trained in using the Vality matching algorithm, and does not explain Vality concepts or specific commands you can use to customize the rule set files. For detailed information about the rule sets and commands you can use, see the INTEGRITY Real Time User Guide for C.

Naming Rule Sets

Each rule set you define has a name, and the files within each rule set have the same name as the rule set. The file extensions depend on the type of rule set file. The first five characters in a rule set name must be unique; that is, you cannot name rule sets **eindex1** and **eindex2**.

e*Index includes six different type of files in the rule set named **UI**: a match key dictionary (**UI.DCT**), a standardization file (**UI.STN**), a classification table (**UI.CLS**), a pattern rules file (**UI.PAT**), a rules file (**UI.RUL**), and a table file (**UI.TBL**). Note that each file is named **UI.*** to indicate that it belongs to the **UI** rule set. The address rule set files follow similar naming patterns.

About the e*Index Rule Sets

Several default rule set files are created when you install e*Index. The rule set named **UI** is the rule set used for matching on person demographics. The remaining rule sets are used for parsing address information, and are specific to the countries you can specify in the COUNTRY control key (for more information, see "What Control Keys are Available?" in Chapter 5 of this guide). The rule sets used for address searching are named AUADDR (for Australia addresses), GBADDR (for addresses in Great Britain and Ireland), FRADDR (for addresses in France), and USADDR (for United States addresses). You can only use one address-specific rule set for your e*Index implementation.

About the UI Rule Set

The matching algorithm uses the UI rule set to determine the probability of a match between two member profiles based on their demographic data.

■ **UI.RUL**
The rules file defines the matching parameters for the fields on which matching is performed. The match fields used in **UI.RUL** must also be defined in **UI.DCT**.

■ **UI.DCT**
The match key dictionary defines the data structure of the fields on which matching is performed. The matching rules are defined in **UI.RUL**, and the data string passed to Vality is defined in the configurable query.

Important! The columns selected for matching in the configurable query must be identical to the fields defined in UI.DCT, and they must appear in the same order. This will ensure that the string created for the match process is correct.

■ **UI.STN**
The standardization file contains the specifications for how data is to be standardized, including the size of the input record, the number of records, the process name, and so on. This is the standardization file used when matching against demographic fields. This file also specifies the rule set to use for each field.

■ **UI.CLS**
The classification table classifies parsed tokens and specifies standard abbreviations for token values.

UI.PAT
The pattern rules file specifies how the token patterns that are generated should be interpreted. It also specifies how the matching key data structure should be populated with token values

Rule Set Guidelines

The files in a rule set work together to define the data elements to be used for matching, the match processing rules, parsing logic, and standardization rules. This means that the information contained in each file is dependent on information contained in other files. Following are some rules to follow when customizing the rule set files.

■ The file **UI.STN** specifies the name of the rule set to be used for each data element.

■ The match keys (data elements to be used for match processing) defined in **UI.DCT** are first name, last name, SSN, date of birth, and sex (in that order) by default. You can customize the data elements used, but you must also customize the configurable query accordingly.

■ The file **UI.DCT** defines the match keys. These data elements must include all those defined in **UI.RUL**.

■ The pattern-action file (**UI.PAT**) should only be modified if absolutely necessary. If you modify the pattern rules file, be sure that the following lines appear in the file:

```
;Find first name only no last name
& | \; | \; | **
COPY [1] {FN}
COPY [1] {SF}
CONVERT {SF} @ui.tbl
RETYPE [1] O
RETYPE [2] O
;Find last name only no first name
\; | ? | \; | **
COPY_S [2] {LN}
RETYPE [1] O
RETYPE [2] O
```

If you modify the match fields in **UI.RUL**, you may also need to modify the **UI.PAT** file. Do not modify this file unless you have a strong working knowledge of Vality tokens and pattern-action rules. SeeBeyond recommends that you consult with your SeeBeyond representative before making any changes to this file.

■ The classification file (**UI.CLS**) provided with e*Index is a placeholder. This file should not require any modifications.

■ Only one address-parsing rule set can be loaded at one time. The address-parsing rule set should be the rule set appropriate to the country of installation.

About the USADDR Rule Set

The USADDR rule set is specifically designed to parse United States addresses for the address search functionality of e*Index. By default, this rule set is the one used when the COUNTRY control key is set to **USA**.

■ **USADDR.DCT**
The match key dictionary defines the data structure of the parsed address fields for searching against United States address components.

■ **USADDR.STN**
The standardization file contains the specifications for how data is to be standardized, including the size of the input record, the number of records, the process name, and so on. This is the standardization file used when searching against United States address components.

■ **USADDR.CLS**
The classification table classifies parsed tokens and specifies standard

abbreviations for token values for searching against United States address components.

- **USADDR.PAT**
  The pattern rules file specifies how the token patterns that are generated should be interpreted. It also specifies how the match key data structure should be populated with token values. This pattern file is used for searching against United States address components.

- **USADDR.PRC**, **USADDR.UCL**, **USADDRIP.TBL**, **USADDRIT.TBL,**
  USADDRUP.TBL, and **USADDRUT.TBL**
  These are override tables that can be used to complement the classification and pattern files by providing additional instructions during processing. Currently, these files contain no instructions, but are placeholders so you can add override instructions if needed. For more information about how these files can be used, see chapter 2 of the *INTEGRITY Rules User Guide*.

About the GBADDR Rule Set

The GBADDR rule set is specifically designed to parse addresses in Great Britain and Ireland for the address search functionality of e*Index. By default, this rule set is the one used when the COUNTRY control key is set to **GBR** or **IRL**.

- **GBADDR.DCT**
  The match key dictionary defines the data structure of the fields when searching against Great Britain or Ireland address components.

- **GBADDR.STN**
  The standardization file contains the specifications for how data is to be standardized, including the size of the input record, the number of records, the process name, and so on. This standardization file is used when searching against Great Britain or Ireland address components.

- **GBADDR.CLS**
  The classification table classifies parsed tokens and specifies standard abbreviations for token values for searching against Great Britain or Ireland address components.

- **GBADDR.PAT**
  The pattern rules file specifies how the token patterns that are generated should be interpreted. It also specifies how the match key data structure should be populated with token values. This pattern file is used for searching against Great Britain or Ireland address components.

■ **GBADDR.UCL**, **GBADDR.PRC**, **GRADDRIP.TBL**, **GRADDRIT.TBL**, **GRADDRUP.TBL**, and **GRADDRUT.TBL**
These are override tables that can be used to complement the classification and pattern files by providing additional instructions during processing. Currently, these files contain no instructions, but are placeholders so you can add override instructions if needed. For more information about how these files can be used, see chapter 2 of the *INTEGRITY Rules User Guide*.

About the AUADDR Rule Set

The AUADDR rule set is specifically designed to parse Australian addresses for the address search functionality of e*Index. By default, this rule set is the one used when the COUNTRY control key is set to **AUS**.

■ **AUADDR.DCT**
The match key dictionary defines the data structure of the fields on which matching is performed when searching against Australian address components.

■ **AUADDR.STN**
The standardization file contains the specifications for how data is to be standardized, including the size of the input record, the number of records, the process name, and so on. This is the standardization file used when searching against Australian address components.

■ **AUADDR.CLS**
The classification table classifies parsed tokens and specifies standard abbreviations for token values for searching against Australian address components.

■ **AUADDR.PAT**
The pattern rules file specifies how the token patterns that are generated should be interpreted. It also specifies how the match key data structure should be populated with token values. This pattern file is used for matching against Australian address components.

■ **AUADDR.UCL**, **AUADDR.PRC**, **AUADDRIP.TBL**, **AUADDRIT.TBL**, **AUADDRUP.TBL**, and **AUADDRUT.TBL**
These are override tables that can be used to complement the classification and pattern files by providing additional instructions during processing. Currently, these files contain no instructions, but are placeholders so you can add override instructions if needed. For more information about how these files can be used, see chapter 2 of the *INTEGRITY Rules User Guide*.

About the FRADDR Rule Set

The FRADDR rule set is specifically designed to parse French addresses for the address search functionality of e*Index. By default, this rule set is the one used when the COUNTRY control key is set to **FRA**.

- **FRADDR.DCT**
  The match key dictionary defines the data structure of the parsed address fields for searching against French address components.

- **FRADDR.STN**
  The standardization file contains the specifications for how data is to be standardized, including the size of the input record, the number of records, the process name, and so on. This is the standardization file used when searching against French address components.

- **FRADDR.CLS**
  The classification table classifies parsed tokens and specifies standard abbreviations for token values for searching against French address components.

- **FRADDR.PAT**
  The pattern rules file specifies how the token patterns that are generated should be interpreted. It also specifies how the match key data structure should be populated with token values. This pattern file is used for searching against French address components.

- **FRSUFFIX.TBL**
  This is an override table that defines and standardizes certain address components to enable parsing. For example, RU, RUE, and RUES are all standardized to R, to indicate they represent the same thing.

- **FRADDR.UCL**, **FRADDR.PRC**, **FRADDRIP.TBL**, **FRADDRIT.TBL,** **FRADDRUP.TBL**, **FRADDRUT.TBL**, and **FRADDRMF.TBL**
  These are override tables that can be used to complement the classification and pattern files by providing additional instructions during processing. Currently, these files contain no instructions, but are placeholders so you can add override instructions if needed. For more information about how these files can be used, see chapter 2 of the *INTEGRITY Rules User Guide*.

Maintaining Rule Set Information

Overview

The e*Index Administrator provides ability to maintain Vality rule set information in the database with the Rule Set Maintenance and Control File Maintenance functions. This section describes those functions and provides information about how this information is stored.

About Rule Set and Control File Maintenance

e*Index Administrator allows you to configure the rule sets you are using by loading new rule set files, creating new rule sets, modifying existing rule sets, and modifying rule set files. You can use the Rule Set Maintenance function to modify the structure of the e*Index rule sets, and you can use the Control File Maintenance function to modify the actual content of the rule set files. Any changes to rule set files must be loaded into the database in order for the information to be used by the matching algorithm. If you use Control File Maintenance to modify a file in a rule set that is currently in use by e*Index, the new information is automatically loaded to the database when you save the file. If you modify a rule set file outside of the configuration tool (e.g., through the Vality Re-engineering Environment or a text editor), then you need to use Rule Set Maintenance to load the new information into the database.

Important! *If your database is installed in a Unix environment, you should not use Control File Maintenance to modify the rule set files. Instead, use a Unix editor to ensure that no carriage return characters are inadvertantly added to the files.*

How is Rule Set Information Stored?

Information from the rule sets used by e*Index is stored in the database in the table *ui_ctrl_rule*. Information about the rule set files, including the content of the files, is stored in the table *ui_ctrl_file* with the exception of the nickname information stored in **UI.TBL**. This data is stored in the table *ui_nickname*. When you modify and load a file into the database, the previous information is written to a history table, *ui_ctrl_file_hist*. If you delete a file from the rule set using the Rule Set Maintenance function, then all information about that file is deleted from both the *ui_ctrl_file* and the *ui_ctrl_file_hist* tables. This helps to maintain referential integrity. The information stored in the database is always regarded as the most current rule set data.

Where are the Rule Set Files Stored?

When you install the e*Index GUI, the GUI home directory does not contain any Vality files until you first log in to the database from the e*Index GUI. On GUI initialization, e*Index checks the database for Vality information and then downloads that information into rule set files, which are placed in the GUI home directory. In the e*Gate environment, the rule set files are downloaded from the database when the e*Way initializes. The files are placed in the directory specified by **ui-set-vticfg** in the e*Way initialization file, which is **\<eGate>\client\bin** by default. A complete set of rule set files is located in the directory where you installed the database installation files in **\server\UIinitial\Rules**. You should make backup copies before modifying any rule set files.

Configuring Rule Sets

Overview

Rule Set Maintenance allows you to customize the Vality rule sets used by the matching algorithm to determine search matches, to identify potential duplicates, and to parse criteria components. The actions you can perform using Rule Set Maintenance include:

- Viewing Rule Sets

- Defining Rule Sets

- Modifying Rule Set Information

- Deleting Rule Sets

- Adding Files to a Rule Set

- Loading Files to the Database

- Deleting Files from a Rule Set

Important! *These functions should **only** be performed by an administrator who is very familiar with Vality, rule set files, and the matching requirements of the data being processed by e*Index. Performing any of these functions after processing live data will most likely result in inconsistent results.*

Viewing Rule Sets

You can view all existing rule sets on the Rule Set Maintenance window. This window includes header and detail information about each rule set. You cannot modify rule set information on this window.

View rule set information on the Rule Set Maintenance window
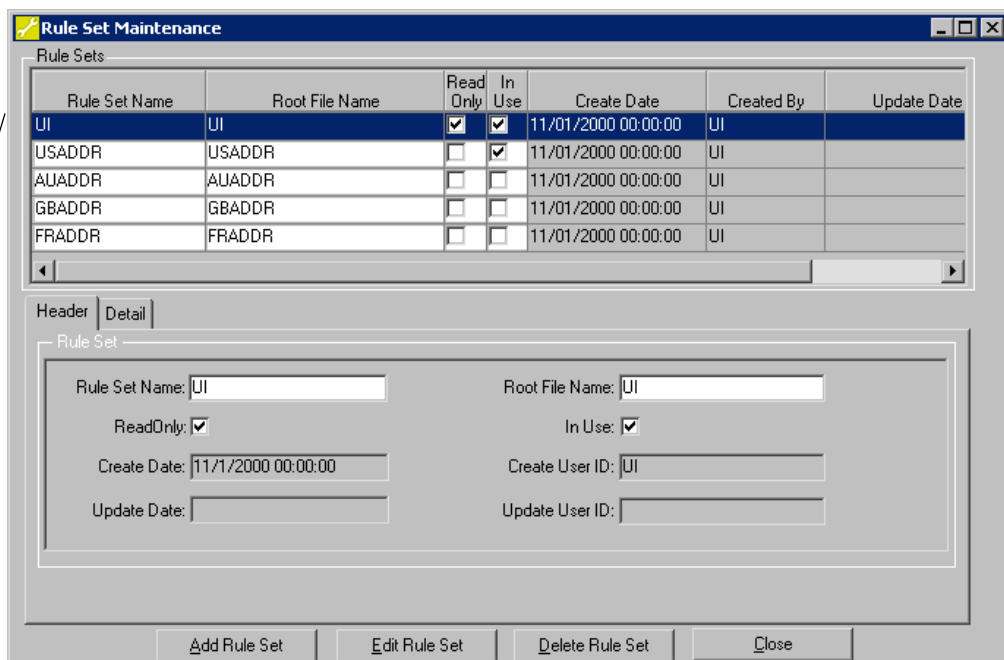
▶ **To view rule sets**

Before you begin:

✓ Log on to the e*Index Administrator

Rule Set
Maintenance tool

1 On the primary toolbar, click **Rule Set Maintenance**. The Rule Set Maintenance window appears.

2 To view summary information for a specific rule set, highlight that rule set in the upper portion of the window. The summary information appears in the lower portion of the window (for more information about the fields displayed on this page, see "About Rule Set Summary Fields" following this procedure).

3 To view detailed information for a specific rule set, highlight that rule set in the upper portion of the window and then click the Detail tab. The information appears in the lower portion of the window (for more information about the fields displayed on this page, see "About Rule Set Detail Fields" following this procedure).

The Detail page displays information about the files in a rule set

Type	File Name	Ext	Content Date	File Loaded	Last Sync Date	Created Date	
TBL	UI	TBL	6/8/2001 23:46:45	No		11/1/2000 00:00:00	U
PAT	UI	PAT	11/1/2000 00:00:00	Yes		11/1/2000 00:00:00	U
STN	UI	STN	11/1/2000 00:00:00	Yes		11/1/2000 00:00:00	U
CLS	UI	CLS	11/1/2000 00:00:00	Yes		11/1/2000 00:00:00	U
RUL	UI	RUL	11/1/2000 00:00:00	Yes		11/1/2000 00:00:00	U
DCT	UI	DCT	11/1/2000 00:00:00	Yes		11/1/2000 00:00:00	U

Close tool

4   When you finish viewing rule set information, click **Close** to exit the Rule Set Maintenance window.

About Rule Set Summary Fields

The fields located in the upper portion of the Rule Set Maintenance window display summary information for each rule set. This information also appears on the Header page in the lower portion of the window.

This field …	displays this information …
Rule Set Name	The full name of the rule set.
Root File Name	The characters that constitute the first part of the file names. The name of each file in the rule set consists of these characters plus the 3-character file extension. Override table files contain two additional characters that indicate the purpose of the override.
Create Date	The date that the rule set was created.
Created By (or **Create User ID**)	The login ID of the user who created the rule set.
Update Date	The date that the rule set was last updated.
Updated By (or **Update User ID**)	The login ID of the user who last updated the rule set.

This checkbox …	indicates …
Read Only	Whether the rule set can be modified. If this box is selected, then the rule set cannot be modified. The matching rule set included with e*Index (UI) is read-only. The address rule sets are not read-only.
In Use	Whether the rule set is currently being used by e*Index. If this box is selected, then the rule set is currently in use.

About Rule Set Detail Fields

The fields located on the Detail page in the lower portion of the Rule Set Maintenance window display information about the files included in the highlighted rule set.

This field …	displays this information …
Type	The file-type extension of each file in the rule set.
File Name	The name of each file in the rule set without the file extension.
Ext	The 3-character file extension of each file in the rule set.
Content Date	The date that the file content was loaded into the database.
File Loaded	An indicator that specifies whether the file has been loaded into the database.
Last Sync Date	This field is reserved for future use.
Create Date	The date that the rule set was created.
Created By	The login ID of the user who created the rule set.
Update Date	The date that the rule set was last updated.
Updated By	The login ID of the user who last updated the rule set.

Defining Rule Sets

e*Index provides standard rule sets with the database installation. If none of these rule sets meets your data matching requirements, you can use Rule Set Maintenance to create new rule sets. You can use more than one rule set with e*Index, but you can only use one rule set to process each field.

Add rule sets and rule set files on the Rule Set – Add window

▶ To define a rule set

Before you begin:

✓ Obtain information about the rule set you want to add, such as the names of the rule set files and which rule set files you need to add

1 Using the Vality Data Re-engineering Batch Environment, create the files you want to use for the new rule set.

Note: You can create and save a rule set before you create the files to be included in the rule set, but you cannot load the files to the database until you have created the files.

2 When you finish creating the rule set files, log on to e*Index Administrator.

Rule Set Maintenance tool

3 On the primary toolbar, click **Rule Set Maintenance**. The Rule Set Maintenance window appears.

Add Rule Set tool

4 On the Rule Set Maintenance window, click **Add Rule Set**. The Rule Set – Add window appears.

5 In the upper portion of the Rule Set – Add window, fill in identifying information (for more information, see "About Rule Set Summary Fields" earlier in this chapter).

*Note: You can only enter information into the fields **Rule Set Name**, **Root File Name**, and **In Use** in this portion of the window. The remaining fields are display-only.*

Add File tool

6 To add files to the new rule set, click **Add File**. A new row appears in the lower portion of the window.

7 In the new row, enter information about the new file (for more information, see "About Rule Set File Fields" following this procedure).

Save tool

8 On the Rule Set – Add toolbar, click **Save**.

9 To load the rule set file content to the database, do the following for each new file:

Load File tool

- In the lower portion of the Rule Set – Add window, highlight the file name to be loaded.
- On the Rule Set – Add toolbar, click **Load File**.
- On the Select File dialog, select the file to be loaded, and then click **Open**. The new information is added to the database.

Close tool

10 On the Rule Set – Add toolbar, click **Close**.

About Rule Set File Fields

Most of the fields located in the Files section of the Rule Set – Add window are display only. You can select the file type for each file, as well as override rules for the table files you add.

In this field …	type or select …
Type	The type of file you are adding. The options include: • Classification • Dictionary • Standardization • Pattern • Rule • Table • Frequency
Table Override	The appropriate override value for the file. You can only select override options for table files (for more information about override values, refer to your Vality documentation). When you select an override option, characters are appended to the file name to indicate the type of override. The options include: • User Classification (CL) • Input Pattern (IP) • Input Text (IT) • Field Pattern (FP) • Field Text (FT) • Unhandled Pattern (UP) • Unhandled Text (UT)

This field …	displays this information …
File Name	The first characters of the file name (as defined in the **Root File Name** field in the upper portion of the window). Tables with override rules will have additional characters appended to the file name.
Ext	The 3-character extension of each file. These extensions correspond with the file type you selected.
Content Date	The date that the file content was loaded to the database.
File Loaded	An indicator of whether the file has been loaded to the database. A **Yes** in this field indicates that the file has been loaded.
Create Date	The date that the file was created.
Created By	The login ID of the user who created the file.

This field …	displays this information …
Update Date	The date that the file was last updated.
Updated By	The login ID of the user who last updated the file.

Modifying Rule Set Information

Once you add a new rule set, you can modify the rule set as needed. Only modify the standard e*Index rule set (UI) or address rule sets if you are trained in Vality and fully understand the impact of your changes.

Modify rule set information on the Rule Set – Edit window

▶ **To modify rule set information**

Before you begin:

✓ Obtain information about the rule set you want to modify and the required modifications

Rule Set Maintenance tool

1 On the primary toolbar, click **Rule Set Maintenance**. The Rule Set Maintenance window appears.

Edit Rule Set tool

2 On the Rule Set Maintenance window, highlight the rule set you want to modify and then click **Edit Rule Set**. The Rule Set – Edit window appears.

3 Do any of the following:

To indicate that the rule set is currently in use, select the **In Use** checkbox.

To indicate that the rule set is not currently in use, clear the In **Use** checkbox.

---

*Important! You can only select one address rule set to be in use at one time. Make sure the address rule set whose **In Use** checkbox is selected corresponds to the country specified by the COUNTRY control key.*

To add a file to the rule set, follow steps 3 through 6 under "Adding Files to a Rule Set" later in this chapter.

To delete a file from the rule set, follow steps 3 through 5 under "Deleting Files from a Rule Set" later in this chapter.

Save tool

4 On the Rule Set – Edit toolbar, click **Save**.

Load File tool

5 If you added any new files to the rule set, you can load the files to the database now. Do the following for each new file:

---

*Important! Do not load the **UI.TBL** file. You can update the database with new nickname information by modifying the* ui_nickname *table.*

- In the lower portion of the Rule Set – Edit window, highlight the file name to be loaded.
- On the Rule Set – Edit toolbar, click **Load File**.
- On the Select File dialog, select the file to be loaded, and then click **Open**. The new information is added to the database.

Close tool

6 After you save the changes to the rule set and load the necessary files to the database, click **Close**.

Deleting Rule Sets

After you create a rule set for e*Index, you can delete the rule set if it is no longer useful. Use caution when deleting rule sets, as this action cannot be undone. Do not delete any rule set that is currently in use, and do not delete the **UI** rule set.

Delete rule sets on the Rule Set Maintenance window
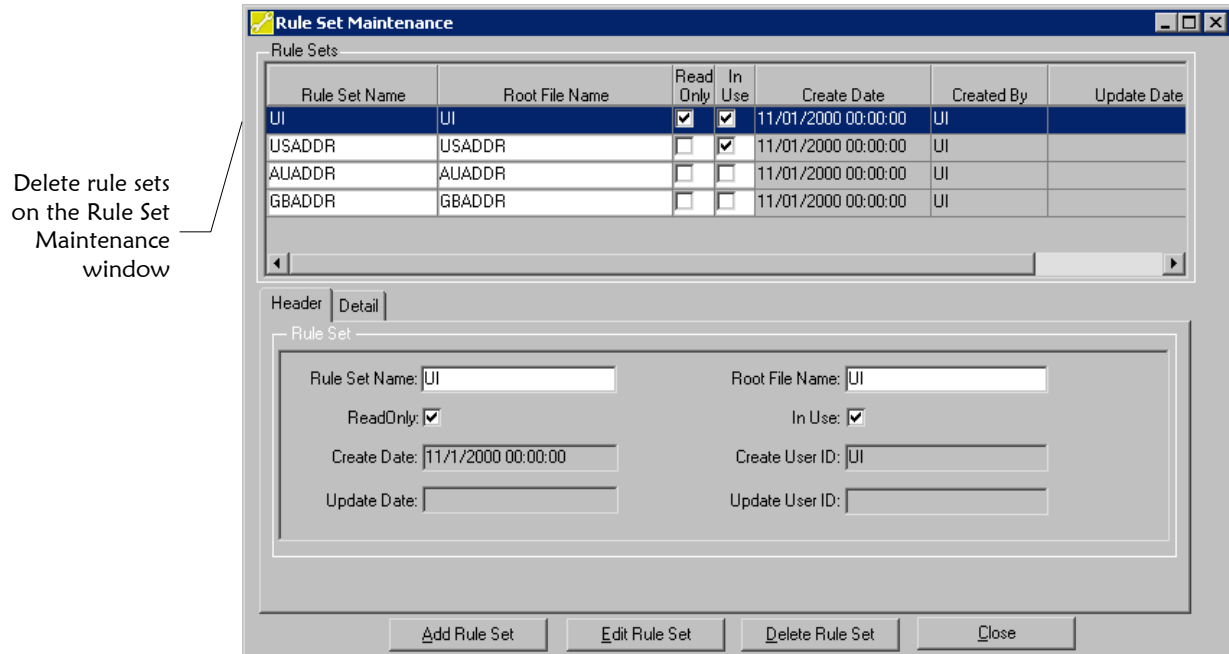
▶ To delete a rule set

Before you begin:

✓ Obtain information about the rule set you want to delete, such as the rule set name

Rule Set Maintenance tool

1 On the primary toolbar, click **Rule Set Maintenance**. The Rule Set Maintenance window appears.

Delete Rule Set tool

2 On the Rule Set Maintenance window, highlight the rule set you want to delete and then click **Delete Rule Set**. The Rule Set – Delete Confirmation dialog appears.

Rule Set -Delete Confirmation Dialog
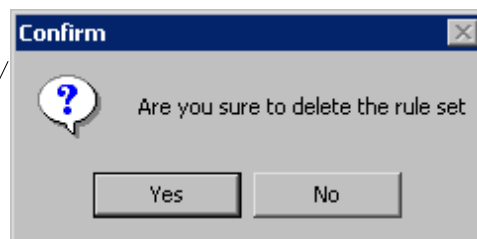
> ***Caution!*** *Before continuing, make sure you want to delete the rule set.*
> *Deleting a rule set that is in use, or has been used in the past, will change the*
> *way data is matched and processed. This action cannot be undone.*

[Yes]
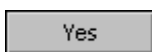
Yes button

3   Click **Yes** on the Rule Set – Delete Confirmation dialog. The selected
      rule set is removed.

Adding Files to a Rule Set

Once you define a rule set, you can add new files to the rule set as needed.
You can also add new files to the default rule sets. Each rule set can only
contain one file of each type except table (.TBL) files. A rule set can contain
many table (.TBL) files that perform different functions.

Add files to
rule sets on
the Rule Set —
Edit window

▶   **To add a file to a rule set**

Before you begin:

✓   Obtain information about the rule set you want to modify, and the
     files you want to add to the rule set

[Rule Set Maintenance icon]

Rule Set
Maintenance tool

1   On the primary toolbar, click **Rule Set Maintenance**. The Rule Set
      Maintenance window appears.

Edit Rule Set tool

2 On the Rule Set Maintenance window, highlight the rule set to which you want to add files and then click **Edit Rule Set**. The Rule Set – Edit window appears.

Add Rule Set tool

3 On the Rule Set – Edit toolbar, click **Add Files**. An empty row appears in the lower portion of the window.

4 In the new row, enter information about the file you want to add (for more information, see "About Rule Set File Fields" earlier in this chapter).

5 Repeat steps 3 and 4 for each file you want to add.

Save tool

6 On the Rule Set – Add toolbar, click **Save**. The new information is saved to the rule set, however you must load the file in order to save the file content to the database (for more information, see "Loading Files to the Database" next).

Loading Files to the Database

After you add a file to a rule set, you need to load the file in order to save the information to the database. This process includes associating the file names you created for the rule set (in Rule Set Maintenance) with the actual ASCII files containing the rule set file content.

Important! *Do not load the* **UI.TBL** *file. You can update the database with new nickname information by modifying the* ui_nickname *table.*

On the *Select File* dialog, you can select the ASCII file to load for each rule set file
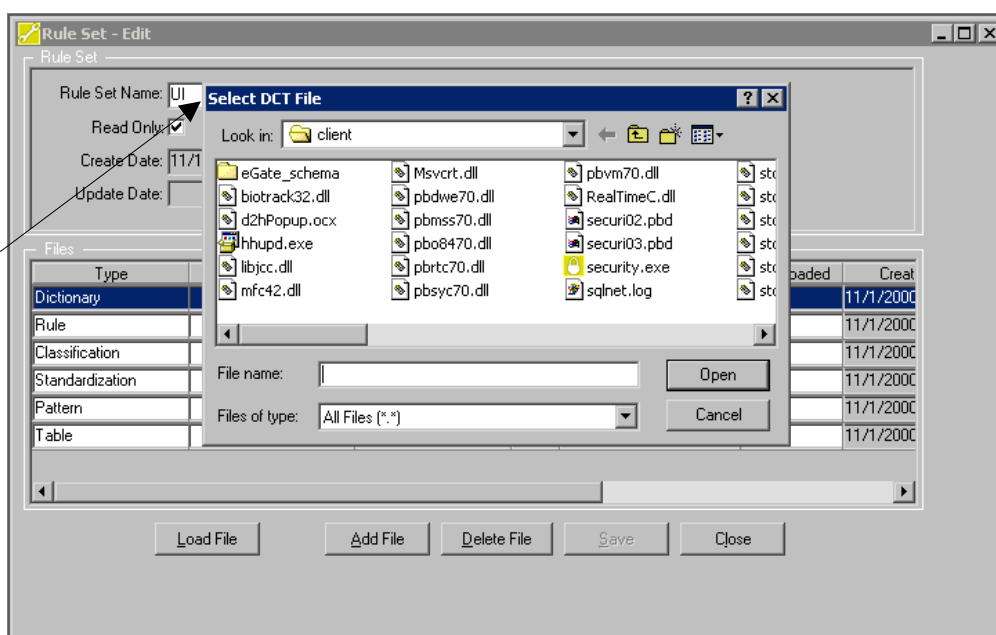
▶ **To load files to the database**

Before you begin:

✓ Obtain information about the rule set you want to modify, and the files you want to load to the database

✓ Make sure you have created all of the necessary ASCII files for the rule set and that the files are named according to the naming conventions on the Rule Set – Add window

Rule Set Maintenance tool

1 On the primary toolbar, click **Rule Set Maintenance**. The Rule Set Maintenance window appears.

Edit Rule Set tool

2 In the upper portion of the Rule Set Maintenance window, highlight the rule set you want to modify, and then click **Edit Rule Set**. The Rule Set – Edit window appears.

Load File tool

3 In the lower portion of the window, highlight the name of the file you want to load to the database, and then click **Load File**. A confirmation dialog appears.

Load Confirm Dialog
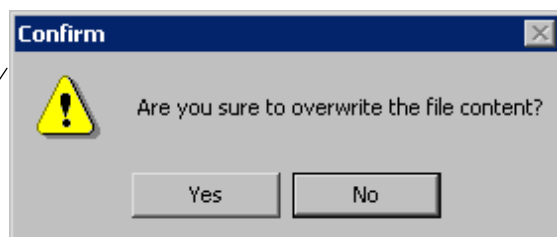
4 On the confirmation dialog, click **Yes**. The Select File dialog appears.

Yes button

5 On the Select File dialog, browse to the location of the file you want to load and then select the appropriate file.

6 Click **Open**. If the file you selected has the expected name, the Load Complete dialog appears.

Load Complete Dialog
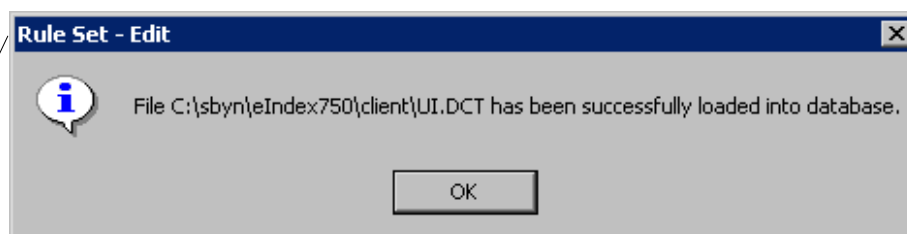
7 Repeat steps 3 through 6 for each file you want to load.

Close tool

8　When you finish loading files to the database, click **Close**.

Deleting Files from a Rule Set

If you add a file to a rule set in error, or if a file is not needed in a rule set, you can delete that file from the rule set. Deleting a file from a rule set also removes that file information from the database. If you delete a file from a rule set in error, you can add the file back (as described in "Adding Files to a Rule Set") and then load the file content back into the database (as described in "Loading Files to the Database").

You can use the
Rule Set – Edit
window to delete
files from rule sets

Type	Table Override	File Name	Ext	Content Date	File Loaded	Creat
Dictionary		UI	DCT	11/1/2000 00:00:00	Y	11/1/2000
Rule		UI	RUL	11/1/2000 00:00:00	Y	11/1/2000
Classification		UI	CLS	11/1/2000 00:00:00	Y	11/1/2000
Standardization		UI	STN	11/1/2000 00:00:00	Y	11/1/2000
Pattern		UI	PAT	11/1/2000 00:00:00	Y	11/1/2000
Table		UI	TBL	6/8/2001 23:46:45	N	11/1/2000
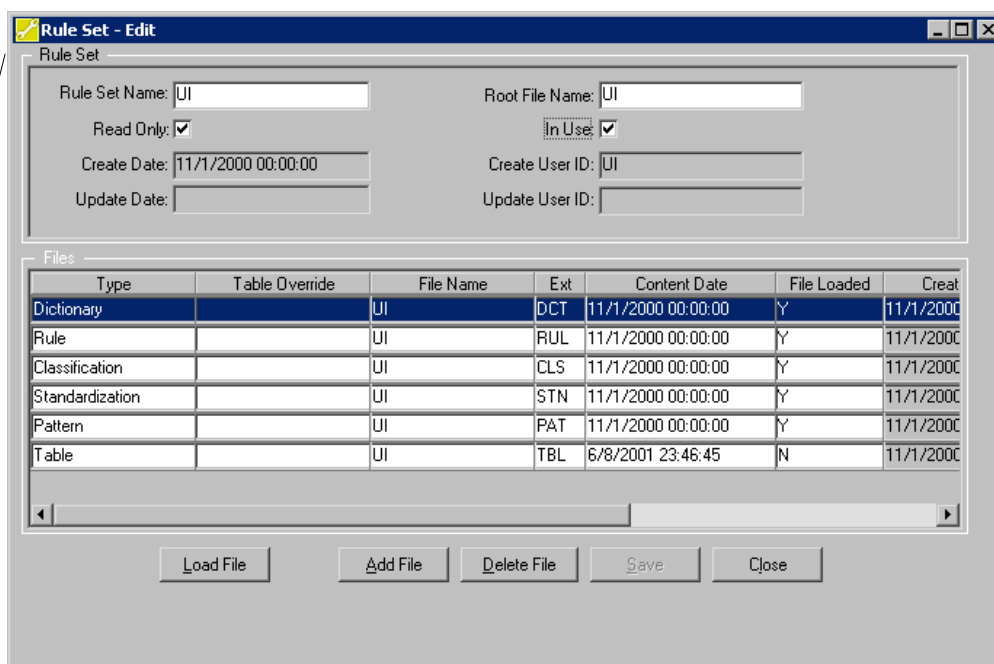
▶ **To delete a rule set file**

Before you begin:

✓　Obtain information about the rule set you want to modify, and the files you want to delete from the rule set

**Rule Set
Maintenance tool**

1　On the primary toolbar, click **Rule Set Maintenance**. The Rule Set Maintenance window appears.

Edit Rule Set tool

2　On the Rule Set Maintenance window, highlight the rule set from which you want to delete files and then click **Edit Rule Set**. The Rule Set – Edit window appears.

Delete Files tool

3 In the lower portion of the Rule Set – Edit window, select the file you want to delete and then click **Delete Files**. The row is deleted.

Save tool

4 Repeat step 3 for each file you want to delete, and then click **Save**.

Close tool

5 When you finish deleting files, click **Close**.

Configuring Rule Set Files

Overview

The Control File Content function allows you to view and modify the content of the files used by the matching algorithm to determine search matches, to identify potential duplicates, and to parse search criteria components. The actions you can perform using Control File Content include:

■ Viewing Rule Set File Content

■ Modifying Dictionary (.DCT) Files

■ Modifying Rules (.RUL) Files

■ Modifying Standardization Files
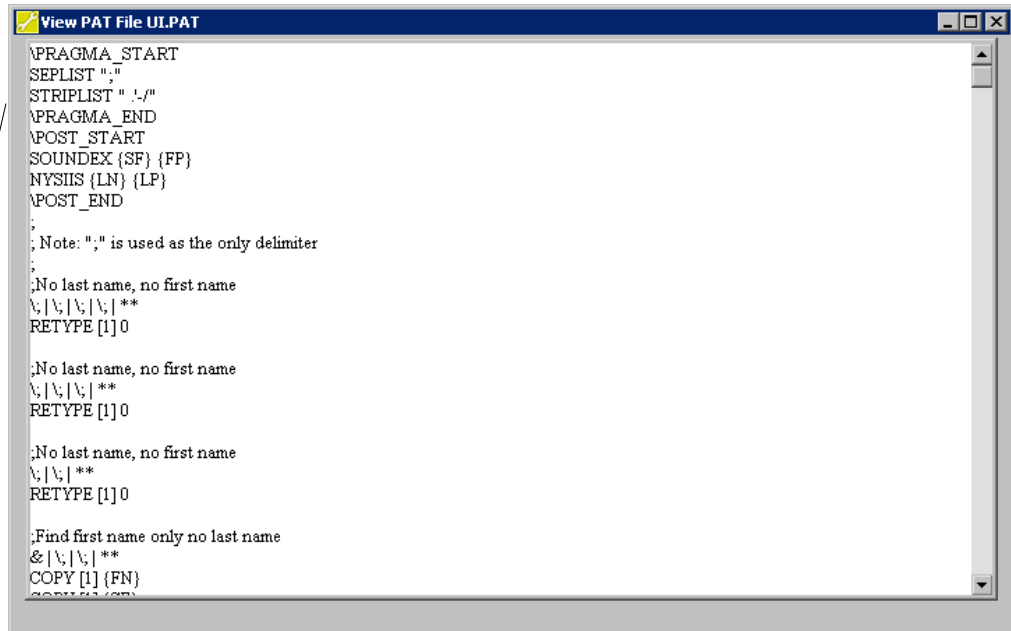
Notes:

■ *You can modify the rule set files using Vality software or any text editor (as long as you understand the format of the files). If your database is installed in a Unix environment, SeeBeyond recommends modifying the files in a Unix editor to avoid carriage return characters at the end of each line.*

■ *If you use a tool other than e*Index Administrator to modify rule set files, be sure to load the files into the database after you change the files (for more information, see "Loading Files to the Database" earlier in this chapter).*

Viewing Rule Set File Content

The View File Content function allows you to view and modify the files in each rule set. You can only modify certain files in each rule set using this function. Files that cannot be edited are displayed in text windows. Files that can be edited are displayed in GUI windows.

View the contents of the rule set files on the View * File windows

```
View PAT File UI.PAT                              _ □ ×
\PRAGMA_START
SEPLIST ";"
STRIPLIST " .'-/"
\PRAGMA_END
\POST_START
SOUNDEX {SF} {FP}
NYSIIS {LN} {LP}
\POST_END
;
; Note: ";" is used as the only delimiter
;
;No last name, no first name
\;|\;|\;|\;|**
RETYPE [1] 0

;No last name, no first name
\;|\;|\;|**
RETYPE [1] 0

;No last name, no first name
\;|\;|**
RETYPE [1] 0

;Find first name only no last name
&|\;|\;|**
COPY [1] {FN}
```

▶ **To view rule set file content**

Before you begin:

  ✓ Make sure you know the name of the rule set whose files you want to view

Control File Content tool

1 On the primary toolbar, click **Control File Content**. The View File Content window appears.

Select the rule set and the rule set files you want to view on the View File Content window
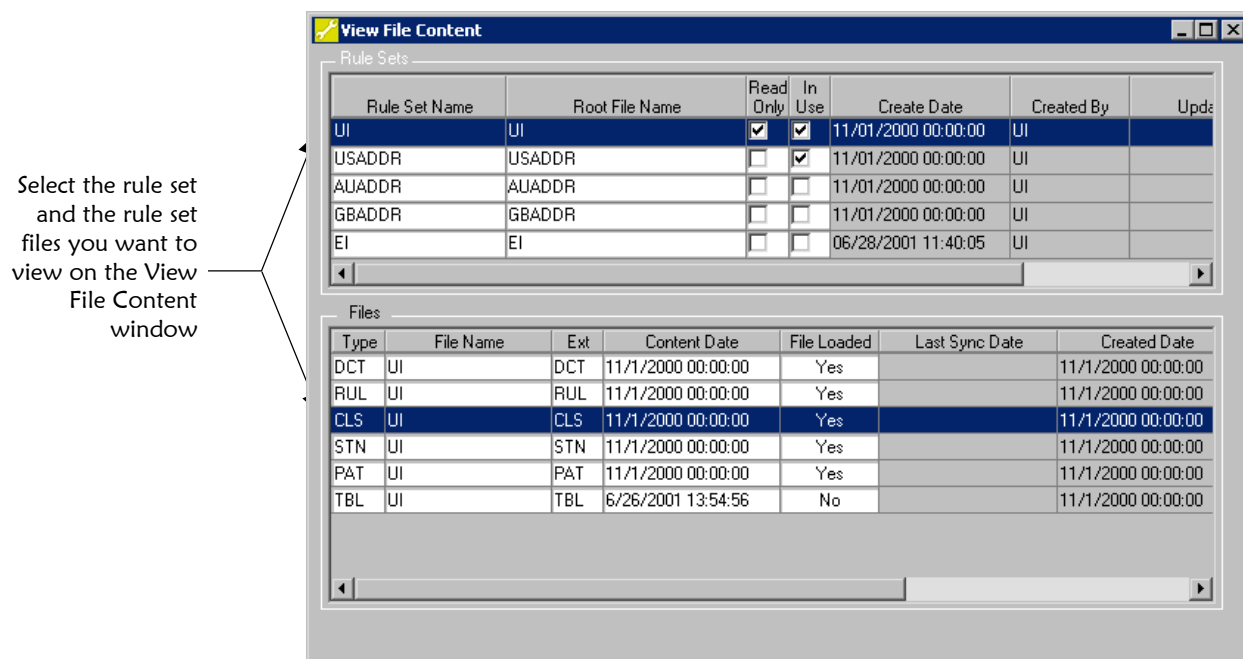
2   In the upper portion of the View File Content window, highlight the rule set whose files you want to view. The files contained in the selected rule set appear in the lower portion of the window.

3   In the Files list, double-click the name of the file you want to view. The View File window appears.

Note: Certain files, such as the .PAT, .CLS, and .TBL files, appear in a text file that you cannot edit. You can edit other files, such as .DCT, .RUL, and .STN files, which appear in a GUI window. Modifying these files is described later in this chapter.

Close tool

4   When you are finished viewing the file, click **Close**.

Modifying Dictionary (.DCT) Files

Once you create a dictionary file for a rule set, you can modify the file using the View File Content function. For the standard e*Index rule sets, you cannot modify the existing information, but you can add, delete, and modify new information. If you modify **UI.DCT**, you need to make corresponding changes to the **UI.RUL** file and to the configurable query columns that are selected for matching. If your database is installed in a Unix environment, you should modify this file in a Unix editor instead of Control File Maintenance to avoid adding carriage return characters at the end of each line.

Modify the
dictionary file
on the DCT File
window

Field	Type	Length	Missing Value	Description	Comment	Offset
FN	Alpha field	100	Spaces	FirstName	1	1
LN	Alpha field	100	Spaces	LastName	101	101
SY	Alpha field	16	Spaces	SSN	201	201
BD	Alpha field	10	Spaces	DOB	217	217
SX	Alpha field	1	Spaces	Sex	227	227
SF	Alpha field	100	Spaces	StdFname	228	228
FP	Alpha field	8	Spaces	PhFname	328	328
LP	Alpha field	8	Spaces	PhLname	336	336

Add   Insert   Delete   Save   Close
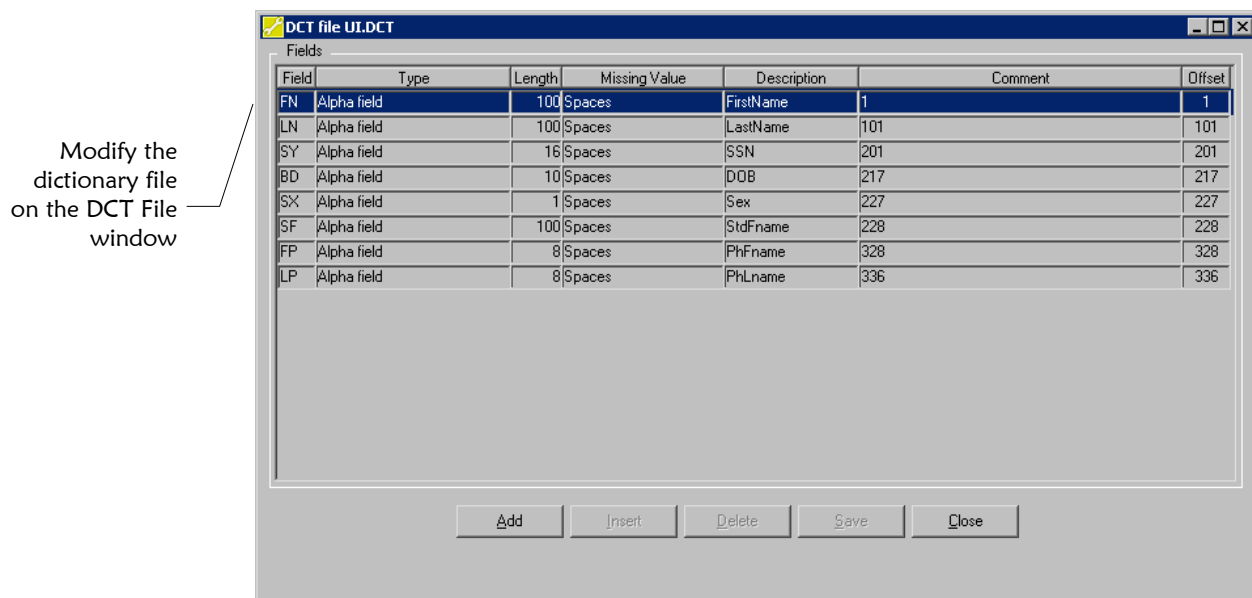
▶ To modify a dictionary file

Before you begin:

   ✓   Obtain information about the changes you need to make to the
       dictionary file

Control File
Content tool

1   On the primary toolbar, click **Control File Content**. The View File
       Content window appears.

2   In the upper portion of the View File Content window, highlight the rule
       set whose dictionary file you want to modify. The files contained in the
       selected rule set appear in the lower portion of the window.

3   In the lower portion of the window, double-click the dictionary file. The
       DCT File window appears, displaying information about the matching
       fields.

Add tool

4   To add a new matching field, do one of the following:

       To insert a new row at the end of the table, click **Add**.

       To insert a new row above the currently selected row, click **Insert** (you
               cannot insert a new row above any of the predefined rows).

Insert tool

5   Enter information into the fields of the new row (for more information,
       see "About Dictionary File Fields" following this procedure).

Delete tool

6   To remove a row, highlight the row you want to remove and then click
       Delete. You cannot delete predefined rows in the default dictionary
       files.

7   To modify a row, highlight the row you want to modify and then change any open field. You cannot modify the predefined rows in the default dictionary files.

8   On the DCT File toolbar, click **Save**.

Save tool

9   To exit the DCT file window, click **Close**.

Close tool

About Dictionary File Fields

Use the fields on the DCT File window to specify information about the fields that are used for matching in the data processed by e*Index.

In this field …	type or select …
Field	A 2-character field name that must be unique for all dictionaries. The first character in this field must be alphabetic; the second character must be alphanumeric.
Type	The type of information contained in the field. Field types include Numeric Field, Alpha Field, Mixed Name, Numeric stripped leading zero, or Mixed alpha and numeric.
Length	The length of the field (in characters).
Missing Value	A single-character code used when a record has missing data in the field. Acceptable codes include:
	• S for spaces
	• Z for zero or spaces
	• N for a negative number (such as -1)
	• 9 for all nines (9999)
	• X indicating no missing value
Description	A brief description of the field.
Comment	Any text relevant to the field.
Offset	The byte offset of the field within the transaction record.

Modifying Rules (.RUL) Files

Once you create a rules file for a rule set, you can modify the file. You can also modify the default rules file, **UI.RUL**, if needed. If you add new fields to this file, you must add corresponding fields to **UI.DCT**. It is not recommended that you modify this file after live data has been processed. This file should only be modified by someone who is very familiar with

Vality. If your database is installed in a Unix environment, you should modify this file in a Unix editor instead of Control File Maintenance to avoid adding carriage return characters at the end of each line.

---

*Important! If you need to add additional information to **UI.RUL** other than what is allowed on the RUL file UI.RUL window, you can edit the **UI.RUL** file in a text editor and then load the information into the database following the instructions under "Loading Files to the Database" earlier in this chapter.*

Modify the rules file on the RUL File window

▶ To modify a rules file

Before you begin:

✓ Obtain information about the changes you need to make to the dictionary file

Control File Content tool

1 On the primary toolbar, click **Control File Content**. The View File Content window appears.

2 In the upper portion of the View File Content window, highlight the rule set whose rules file you want to modify. The files contained in the selected rule set appear in the lower portion of the window.

3 In the lower portion of the window, double-click the rules file. The RUL File window appears. The upper portion of the window displays a list of current rules, and the lower portion of the window displays detail information for the selected rule.

4   To insert a new rule:

Add tool

- On the RUL File toolbar, click **Add**. An empty row appears in the upper portion of the window, and the detail fields are cleared.

- In the fields in the Detail section of the window, enter the information for the new rule. Remember that for each field you add to the .RUL file, there must be a corresponding field defined in the .DCT file. For more information about the detail fields, see "About Rules File Fields" following this procedure.

Delete tool

5   To remove a rule, select the row you want to remove, and then click **Delete**. The selected row is removed. For the standard rules file, **UI.RUL**, you cannot delete existing rows.

6   To modify a row, highlight the row you want to modify and then change any open field in the Detail fields in the lower portion of the window (for more information, see "About Rules File Fields" following this procedure).

Save tool

7   On the RUL File toolbar, click **Save**.

Close tool

8   To exit the RUL File window, click **Close**.

About Rules File Fields

Use the fields on the RUL File window to specify information about the fields used to match member profiles.

In this field …	type or select …
CUTOFF	The match cutoff weight.
VAR Section	
Field Name	The name of the field being matched.
From	The number of the column at which the selected field begins in the transaction records.
Length	The length of the selected field in the transaction records.

In this field …	type or select …
Missing	A single-character code used when a record has missing data in the field. Acceptable codes include:
	• S for spaces
	• Z for zero or spaces
	• N for a negative number (such as -1)
	• 9 for all nines (9999)
	• X indicates no missing value
Comment	Any text pertinent to the selected field.
MATCH Section	
Comparison Type	The method by which the selected field should be compared between records. Comparison types may include alphabetic comparisons, numeric comparisons, date format comparisons, and so on.
DCT Field	The 2-character field code for the field in the .DCT file that corresponds with the selected field in .RUL.
Match Probability	The probability that the selected field will match between two matching records.
Unmatch Probability	The probability that the selected field will match between two records that do not match.
Optional Probability	An additional probability value, which is required for fields with the following comparison types: UNCERT, LRL_UNCERT, PRORATED, TIME, and DELTA_PER. The meaning of this value differs depending on the probability type. See your Vality documentation for more information.
WGT Section	
Add/Replace	An indicator that specifies whether the specified weights are added to the normal calculated weight or whether they replace the calculated weight. Enter **R** to replace the weight with the specified weight; enter **A** to add the specified weight to the weight calculated for the selected field. This field is represented by the letters **AR** in the text version of the file.
Agreement Weight	A number specifying a new agreement weight. This weight is used if the values for the variable agree and are not missing. This field is represented by the letters **AW** in the text version of the file.

In this field …	type or select …
Disagreement Weight	A number specifying a new disagreement weight. This weight is used if the values for the variable disagree and are not missing. This field is represented by the letters **DW** in the text version of the file.
Candidate Missing	A number specifying a new weight in case the value is missing in the candidate record. This field is represented by the letters **BM** in the text version of the file.
Match Key Missing	A number specifying a new weight in case the value is missing in the Match Key data. This field is represented by the letters **AM** in the text version of the file.
Both Missing	A number specifying a new weight in case the value is missing for both the candidate record and the match key. This field is represented by the letters **XM** in the text version of the file.
Match Key Optional	The non-missing value in the selected field in the match key data for which the specified weights apply. For example, if you specify '999999999' in the SSN field, then the specified weights will be applied to cases where the SSN is '999999999'. Specify **ALL** to apply the weights to all non-missing values of the variable. This field is represented by the letters **AV** in the text version of the file.
Candidate Optional	The non-missing value in the selected field in the candidate record for which the specified weights apply. For example, if you specify '999999999' in the SSN field, then the specified weights will be applied to cases where the SSN is '999999999'. Specify **ALL** to apply the weights to all non-missing values of the variable. This field is represented by the letters **BV** in the text version of the file.

Select this checkbox …	to indicate that …
VARTYPE Section	
No Frequency	A frequency file is not being used for the selected field. For more information about frequency files, refer to your Vality documentation.

Select this checkbox …	to indicate that …
Concatenate Other Fields	Certain fields are closely related, and should be used in combination to form a frequency count. In this case, it may be useful to concatenate the different values to form one frequency count of the data combination.
Critical	In order for two records to be a match, the specified field must be a match between the two records.
No Update	Updates should not be performed on the selected field.
Missing Fields Acceptable	If the selected field is missing from one or more of the records, then the records may still be a match.

Modifying Standardization Files

Once you create a standardization file for a rule set, you can modify the file using the View File Content function. You can also modify the standardization files for the default e*Index rule sets. If your database is installed in a Unix environment, you should modify this file in a Unix editor instead of Control File Maintenance to avoid adding carriage return characters at the end of each line.

Modify the standardization file on the STN File window

▶ To modify a standardization file

Before you begin:

   ✓ Obtain information about the changes you need to make to the standardization file

Control File Content tool

1 On the primary toolbar, click **Control File Content**. The View File Content window appears.

2 In the upper portion of the View File Content window, highlight the rule set whose standardization file you want to modify. The files contained in the selected rule set appear in the lower portion of the window.

3 In the lower portion of the window, double-click the standardization file. The STN File window appears. The upper portion of the window displays header information, and the lower portion of the window displays the rule sets referenced by the standardization file.

Add tool

4 To add a new rule set to the file:

   • On the STN File toolbar, click **Add**. An empty row appears in the lower portion of the window.

   • In the empty row, enter information about the rule set you are adding (for more information, see "About Standardization File Fields" following this procedure).

Delete tool
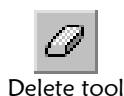
5 To remove a rule set from this file, select the row you want to remove, and then click **Delete**. The selected row is removed. You cannot delete existing rows in the default standardization files.

6 To modify a row, highlight the row you want to modify and then change any open field in the Detail fields in the lower portion of the window (for more information, see "About Standardization File Fields" following this procedure).

Save tool

7 On the STN File toolbar, click **Save**.

Close tool

8 On the STN File toolbar, click **Close**.

About Standardization File Fields

Use the fields on the STN File window to specify information about how the data in the input records should be standardized.

In this field …	type or select …
Rule Set Name	The names of the rule sets used when the matching algorithm processes data.
Line	A number that indicates the line in a record on which specific fields are located. All column ranges in the corresponding Line Arguments field belong to that line number. This value is known as the line specifier.
Line Arguments	The column ranges in which the specified fields are located on the corresponding line.
Root File	The root file name of the .CLS and .PAT files, if different from that specified for the entire rule set. If no root file is specified here, then the standardization file looks for files with the root name specified for the entire rule set.
DCT File	The file name of the .DCT file, if different from that specified in the Root File field.

This field …	displays this information …
Record Size	The size of each record to be processed.

Note: *Carriage-return and line-feed characters are not included in the size. If variable sized records are being processed, this value should specify the size of the longest record. The largest value for this field is 4096.* |
| **Interactive** | An indicator that specifies whether there is an input file. If the value in this field is Yes, then there is an input file. |
| **File Type** | The type of file being processed, such as ASCII, UNIX, or BINARY.

Note: *If this value is missing, it defaults to ASCII on PCs, and to UNIX on UNIX workstations. If ASCII is specified on a UNIX machine, the UNIX format is still used.* |
| **Lines in Record** | The number of lines for each record in the input file. |

Glossary of Terms

Alphanumeric search

A type of search that looks for profiles that match your specified demographic criteria. This type of search does not allow for misspellings or data entry errors.

Application window

All e*Index Administrator windows except for the first window that appears. Application windows are used for specific functions and purposes, such as creating a system record or configuring an application.

Assumed Match

When the matching probability weight between two profiles is above the match threshold, then the two profiles are assumed to represent the same person. These profiles are assumed matches, and are merged into one record.

Audit trail

A stored history of a member's profile. This history displays changes made to a member's demographic information as well as merges, unmerges, adds, and so on.

Candidate selection pool

The candidate selection pool consists of the member profiles retrieved when e*Index performs a preliminary search for matching profiles. The matching algorithm assigns the profiles in the pool a match weight.

Code tables

Tables in the e*Index database that store the data that you use to populate the values in the drop-down lists of the e*Index GUI. They also store processing codes for these data elements.

Configurable candidate selection

When e*Index performs a phonetic search or evalutes potential matches, it first creates a group of candidate profiles that match certain criteria. This process is know as *candidate selection*. In e*Index, the criteria used for the candidate selection can be configured on the e*Index Administrator GUI. Configurable candidate selection (CSS) is also know as the configurable query.

Configurable Query

See Configurable candidate selection.

Control keys

A set of data elements that allow you to configure the system parameters of your e*Index environment, including search attributes, display options, and debugging options.

Default

A value that is automatically entered into a specific field. For example, if you enter a zip code, the city and state are automatically populated with default values. You can modify default values if necessary.

Display Configuration

The ability to modify the names of the fields on the e*Index GUIs, and to specify which fields are displayed on the GUIs.

Drop-down lists

A list of options that you can use to enter information into certain fields. These fields have a down-arrow button on their right side that, when clicked, display a drop-down list of options for that field.

Field

Any area on an e*Index Administrator window that contains information. Most field types contain text or numerical information. Some fields require you to select a predefined value.

GUI

Graphical User Interface. This refers to the windows, buttons, and tools that you use to perform functions within e*Index.

Local ID

A unique identification code assigned to a member in a specific system. A member may have several local IDs in different systems.

Login ID

The identification code that allows you to log on to the e*Index applications. This code is assigned to you by your system administrator.

Main menu

The uppermost menu on the e*Index Administrator windows. You can access all of the primary functions of e*Index Administrator from this menu.

Matching probability weights

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

Microhelp

Descriptions of the fields on e*Index Administrator windows. A field description appears in the status bar when the cursor is in certain fields.

Online documentation

Documentation that is provided in PDF format. These documents can be viewed and printed using Acrobat Reader 3.0 or above.

Online help

A set of information and procedures that can be viewed on your computer monitor to help you perform the functions of e*Index.

Page

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

Password

The unique password that, when used with your login ID, allows you to log on to e*Index Administrator. Your system administrator assigns your password, and may specify that you change your password at certain intervals.

Member profile

A set of information that describes characteristics of an individual member. A profile includes demographic and identification information about the member.

Phonetic search

A search that returns phonetic variations of the entered name, allowing room for misspellings and typographic errors. This type of search can only be performed in the Demographic Search section of the Inquiry window.

Potential duplicates

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

Probability Weight

See "Matching Probability Weight."

Quality Workstation

The computer workstation on which the e*Index Administrator GUI resides.

Tab

A heading on an application window that, when clicked, displays a different type of information. For example, click the Results tab on the Search window to display the resulting records from a search.

UID

The global identification number assigned to each member added to the e*Index application. This number is used to uniquely identify each member across a business enterprise.

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