e*Index Global Identifier Product Suite

e*Index™ Global Identifier User's Guide

Version 4.5.3

SEEBEYOND

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Date	**Purpose**
June 2001	Current through version 4.5
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Table of Contents

Introduction

About this Chapter

Overview

This Introduction welcomes new and experienced e*Index™ Global Identifier (e*Index) users and explains how to use this guide. e*Index is an enterprise-wide master person index that maintains demographic data about the people who participate throughout your business, linking information from different locations and computer systems. This document describes the user interface for SeeBeyond's e*Index.

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** | Learn about the functions and features of e*Index |

| **Additional Resources** | Learn about related publications you may wish to review |

Welcome

Welcome to e*Index, SeeBeyond's enterprise-wide master person index. e*Index provides accurate identification of members throughout your business enterprise, and cross-references member profiles using each member's unique identification number. e*Index also ensures accurate member data by identifying potential duplicate records, and providing the ability to merge duplicate records. In a highly integrated, complex business organization, the ability to uniquely and quickly identify a member profile is essential for efficient communication and effective customer service.

To New Users

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

To Established Users

If you are a more advanced e*Index 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. It includes navigational instructions, functional instructions, and background information about the application's features. This guide also provides the information you need to add, maintain, and verify member data.

What is the Scope of this Guide?

This guide provides step-by-step instructions for all of the functions of e*Index, such as adding and updating member information, identifying duplicate member profiles, merging and unmerging member profiles, and deactivating member profiles. It also includes information on searching for member profiles, viewing an audit trail, and comparing member profiles.

This guide does not include information or instructions on setting up security, maintaining table values, or working with e*Index Monk APIs. 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 should read this guide. Intermediate or advanced users who need a refresher on using some of the basic functions of e*Index should also read this guide. A thorough knowledge of e*Index is not needed to understand this guide.

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.

If you are interested in learning how e*Index may have been customized to suit your company's business needs, see the *e*Index Administrator User's Guide*. For example, if you want to understand more about system default values or how some drop-down field values are customized for your company, you will want to read this guide.

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 ■ Additional Resources
Chapter 2, Getting Started	■ Accessing e*Index ■ Learning About the e*Index Interface ■ Getting Help ■ Exiting e*Index
Chapter 3, Viewing Member Information	■ Learning About Member Inquiries ■ Searching For Members ■ Working with Search Results ■ Viewing Member Profiles
Chapter 4, Adding and Maintaining Member Profiles	■ Learning About Member Profiles ■ Adding a Member Profile ■ Comparing Member Information ■ Maintaining Member Information

What are the Conventions Used in this Guide?

Before you start using e*Index, 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 Administrator 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 2, "Getting Started" See "Adding a Member Profile" later in this chapter
Menu names and commands	Bold, capitalization is identical to the interface	**Functions** menu **Action** menu **Save** command
Messages	Bold	**New UID #100-000-0018 has been added to the database.**
New terms	Italic	A *member profile* is a set of information that describes characteristics about an individual in your database.
Window, page, and dialog titles	Title cap	Detail Inquiry 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. 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:
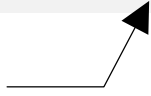
- **Point** means to position the mouse pointer until the tip of the pointer rests on whatever you want to point to on the screen.

- **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 an e*Index 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 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

     criteria for the member you want to find (for more information, see "About Demographic Search 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. If applicable, descriptions of any display-only fields that appear on the window are also provided. For example:

Fields you need to use to complete the procedure

In this field …	type or select …
Title	The title used by the member, such as Ms., Ph.D., Medical Doctor, Reverend, and so on.
	No default
Religion	The member's religious affiliation, such as Agnostic, Buddhist, Christian, and so on.
	No default

Display-only fields you may encounter while performing the procedure

This field or column …	displays this information …
UID	The unique identification number of the member. This number is assigned by e*Index.

About e*Index

Overview

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

What is e*Index?

e*Index is an enterprise-wide master person index that maintains the most current information about the people who participate in your business enterprise. e*Index creates a single, consistent view of all member data by providing an automatic, common identification process regardless of the location or system from which the data originates. Member records from various locations are cross-referenced using a unique universal identifier (UID) assigned to each profile by e*Index. By creating UIDs, e*Index can identify many types of participants, such as customers, employees, contacts, and so on.

The identification and demographic information for all members is centralized in one shared index. Maintaining a centralized database for multiple systems enables e*Index to integrate data throughout the enterprise while allowing local systems to continue operating independently.

What are the Features of e*Index?

e*Index uniquely identifies, matches, and cross-references member information throughout your business. Additions and updates to the database can be made from your existing external systems as batch updates or in real-time.   From the e*Index GUI, you can perform the following functions.

- **Audit Trail**
  The database stores a complete audit history for each member. e*Index stores audit trail information in the database and tracks all changes to each record, storing before and after images as well as recording who made the changes. You can view a member's audit trail online or print a hard copy of the audit trail.

- **Search**
  Using the Quality Workstation, you can search for specific members or sets of members. e*Index allows you to perform different types of searches using different combinations of data elements, and returns a list of potential matches to your search criteria. e*Index also parses address components, so you can search for a member record by their street

address. Most search criteria are case-insensitive, and ignore diacritical marks.

■ **Data Maintenance**
You can add, update, deactivate, and delete data within the e*Index database tables using the Quality Workstation. Data updates from external systems can occur in real-time or as batch processes.   You can also maintain member information by merging or unmerging records.

■ **Potential Duplicates**
Using algorithm matching logic, e*Index has the ability to identify potential duplicate records, and provides the functionality to correct the duplication. Profiles that are potential duplicates can be viewed online in a side-by-side comparison or printed on hard copy. Potential duplication is resolved either by merging the profiles in question or by removing their potential duplicate flags.

■ **Comments**
e*Index generates automatic comments for specific transactions, such as adding, updating, or merging member information. You can also create your own comments to add to a member record. Comments can be viewed online or printed.

■ **Audit Log**
The system administrator can specify that a log is maintained of each instance the *ui_person* table is accessed from the e*Index GUI. This log provides information such as the user ID of the user who accessed *ui_person*, the type of action that was performed against the data, and the date and time of access. From the Audit Log, you can also view an image of the profiles that were accessed.

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

■ **Configuration**
You can configure system parameters for your e*Index system using the e*Index Administrator GUI. This GUI allows you to set search limits and requirements, set matching algorithm limits, customize the appearance of the e*Index GUI, specify country and date formats, modify potential duplicate processing rules, 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 Administrator User's Guide*
Helps system administrators configure system parameters, customize e*Index, work with Vality rule set files, and processing codes. This guide also describes how to maintain the information in the database that is used to populate the drop-down lists in the e*Index.

■ *e*Index Security User's Guide*
Helps system administrators add users and user groups to e*Index, 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 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 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).

■ *Java Programmer's Guide for e*Index Active Integration*
Provides background and implementation information about the Java APIs for e*Index Active Integration. This guide also provides a complete listing of e*Index Java functions, along with a description, parameters, syntax, return values, and examples for each.

Getting Started

About this Chapter

Overview

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

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

Access e*Index	Learn how to log on to e*Index
About the GUI	Learn about the GUI front end of e*Index, including toolbars, menus, and windows
Help Features	Learn about the various help features of e*Index
Exit e*Index	Learn how to log off of e*Index
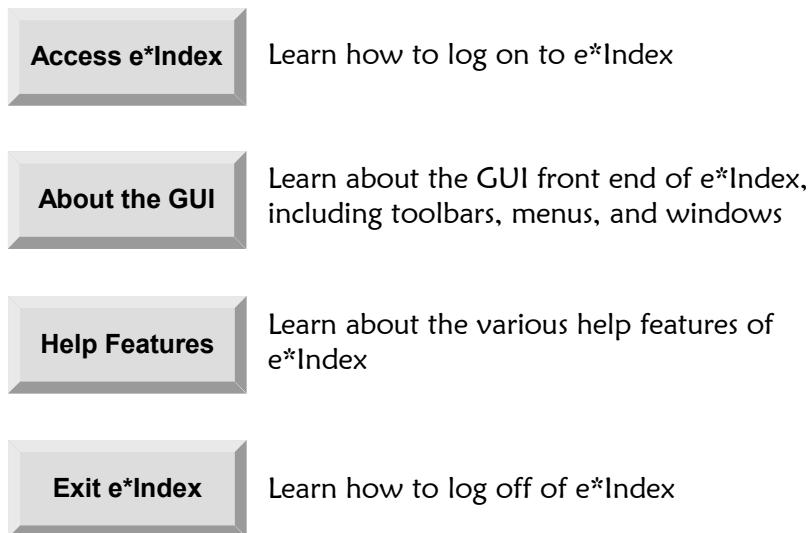
Accessing e*Index

Overview

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

Logging on to e*Index

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

Specify your logon
information on
the e*Index
Administrator
Logon window
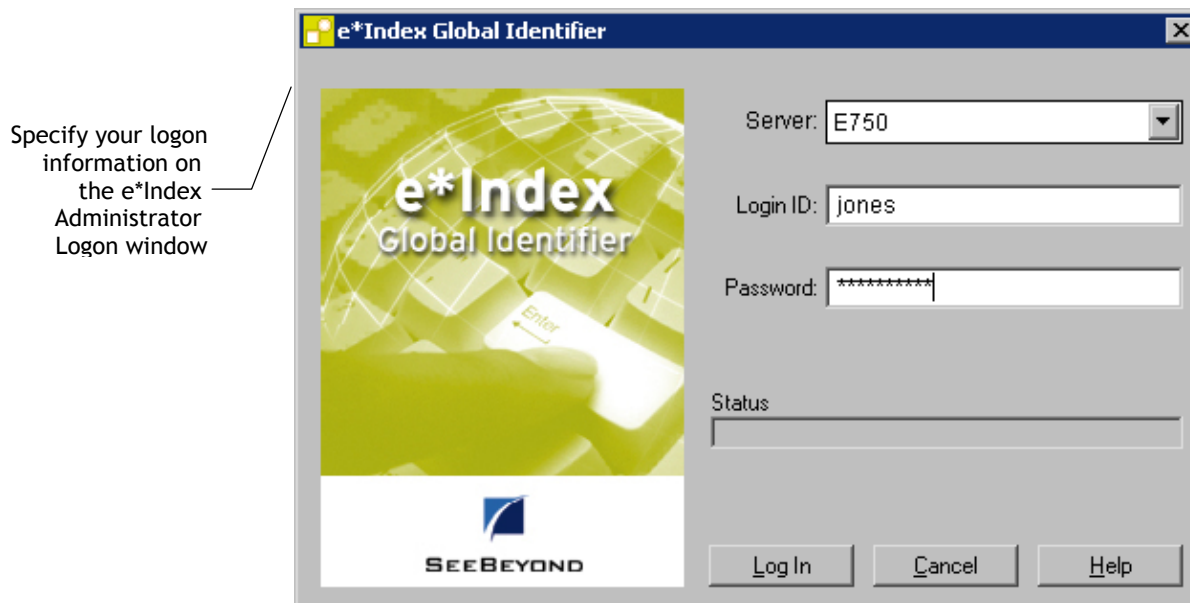
▶ To log on to e*Index

Before you begin:

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

e*Index icon

1   To access e*Index, double-click the e*Index icon on the workstation desktop. This launches e*Index, and the Logon 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 you need a database added to the list.*

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

Log In button

4   In the lower portion of the logon window, click **Log In**. The e*Index Global Identifier Main window appears.
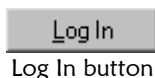
Changing Your Logon Password

Once you log into e*Index, 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
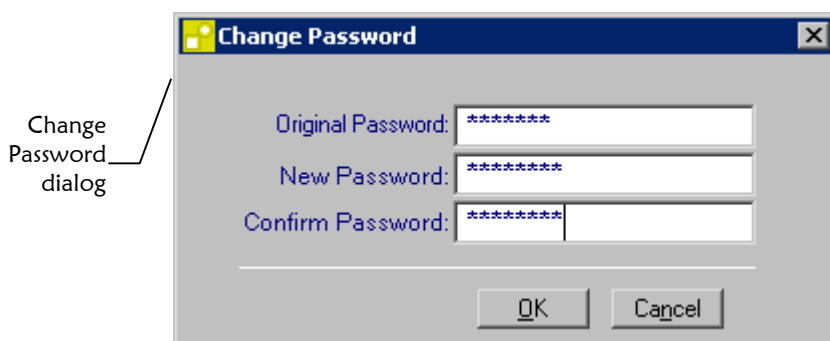
▶ To change your logon password

Before you begin:

✓   Determine the new logon password you want to use

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 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 in.
	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 Interface

Overview

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

About the Basic Design

e*Index is designed specifically to support scattered business locations and disparate information systems across an enterprise, as well as various applications from multiple vendors. Maintaining a centralized database for multiple systems enables e*Index to integrate data throughout the enterprise while allowing local systems to continue operating independently. e*Index makes it easy to find information that was previously scattered among multiple systems.

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 Functions drop-down menu displayed

e*Index Global Identifier - Database: E750 SID: E750

| File | Edit | Functions | Window | Help |

Add	Ctrl+Shift+A
Audit Trail	Ctrl+Shift+T
Compare	Ctrl+Shift+C
Merge	Ctrl+Shift+M
Potential Duplicate	Ctrl+Shift+D
Search & View persons	Ctrl+Shift+S
Address Search	Ctrl+Shift+R
UnMerge	Ctrl+Shift+U
Audit Log	Ctrl+Shift+L
Change Password	Ctrl+Shift+P

What is the e*Index Window?

The e*Index Window is the first window that appears when you log on to e*Index. This window consists of the e*Index 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 e*Index window

Title bar

Main Menu bar

Primary Toolbar

e*Index Application windows appear here

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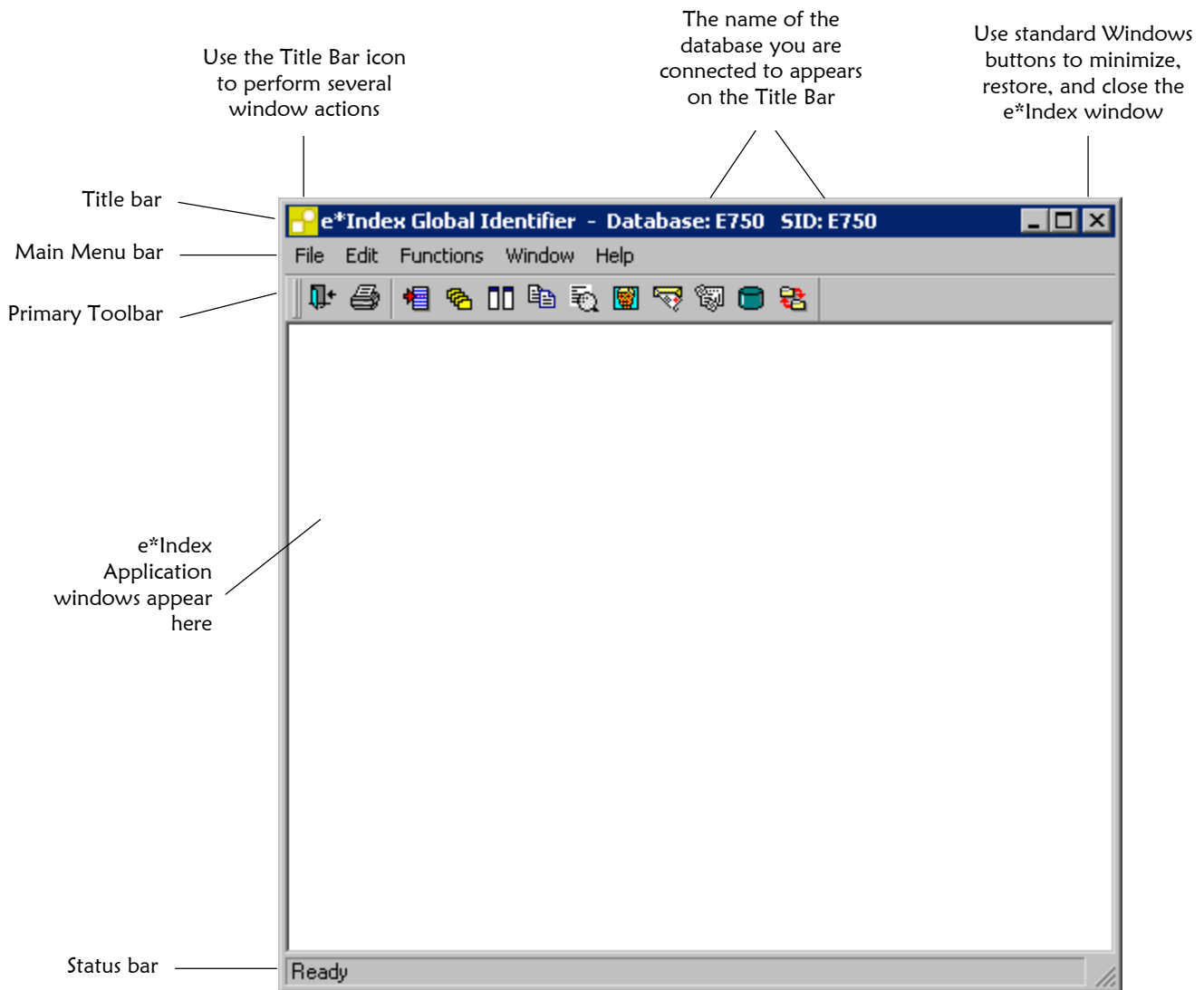
The e*Index window is the first window that appears when you log on.

About the Main Menu

The Main Menu bar lists the names of five drop-down menus (File, Edit, Functions, 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 Functions menu, where you can choose which database function to perform, is used most frequently.

When you access a function, the Main Menu bar lists an additional drop-down menu, named **Actions**, 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. The drop-down menus also display hot key combinations that you can press to perform a specific function. For example, **Ctrl+Shift+M** opens the Merge window.

Select which e*Index function you want to use
from the Functions menu

Main Menu bar —— File   Edit   Functions   Window   Help

Add	Ctrl+Shift+A
Audit Trail	Ctrl+Shift+T
Compare	Ctrl+Shift+C
Merge	Ctrl+Shift+M
Potential Duplicate	Ctrl+Shift+D
Search & View persons	Ctrl+Shift+S
Address Search	Ctrl+Shift+R
UnMerge	Ctrl+Shift+U
Audit Log	Ctrl+Shift+L
Change Password	Ctrl+Shift+P

View available commands on drop-down menus

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.

File
Close
Print Active Screen
Printer Setup..
Exit
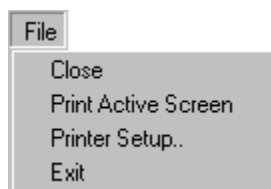
■ **Close**
The Close option closes the current open window, and returns to the previous open window or the e*Index main window.

■ **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 or set up a printer for the current active session.
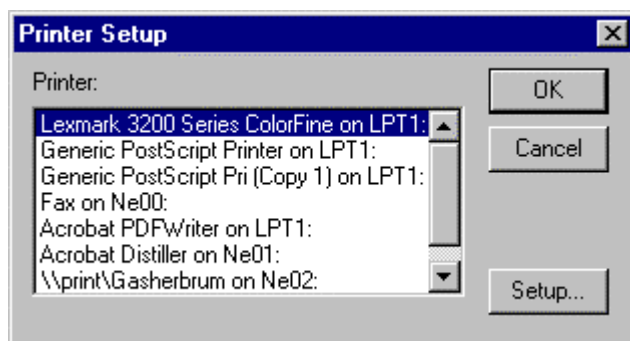
■ **Exit**
The Exit option terminates the application and returns to the Windows Desktop.

About the Edit Menu

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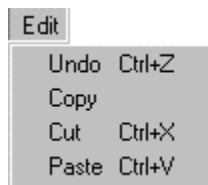
■ **Undo**
Use this command to undo the most recent action (cut, copy or paste) and return to the previous status.

■ **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 Functions Menu

The options available on the *Functions Menu* allow you to access the primary functions of e*Index.

Functions	
Add	Ctrl+Shift+A
Audit Trail	Ctrl+Shift+T
Compare	Ctrl+Shift+C
Merge	Ctrl+Shift+M
Potential Duplicate	Ctrl+Shift+D
Search & View persons	Ctrl+Shift+S
Address Search	Ctrl+Shift+R
UnMerge	Ctrl+Shift+U
Audit Log	Ctrl+Shift+L
Change Password	Ctrl+Shift+P

- **Add**
  This command allows you to add a new member profile. For more information, see "Adding a Member Profile" in Chapter 4.

- **Audit Trail**
  This command allows you to compare a member's profile before and after changes were made. For more information, see "Viewing an Audit Trail" in Chapter 4.

- **Compare**
  Use this command to display two member profiles in a side-by-side comparison. For more information, see "Comparing Member Profiles" in Chapter 4.

- **Merge**
  This command allows you to merge two member profiles into one profile. For more information, see "Merging Member Profiles" in Chapter 4.

- **Potential Duplicate**
  Use this command to detect profiles that are potential duplicates of one another. For more information, see "Finding Potential Duplicates" in Chapter 4.

- **Search & View persons**
  Use this command to query the database for a specific member or a set of members using demographic data as the search criteria. Use this function to view and modify member information, to update local ID information, to update alias names, and to deactivate member profiles. For more information, see "Searching for Member Profiles" in Chapter 3.

- **Address Search**
  Use this command to query the database for a specific member or a set of

members using address information as the search criteria. This
specialized query searches against parsed addressed components to find
profiles that match the search criteria. For more information, see
"Performing an Address Search" in Chapter 3.

- ■ **Unmerge**
  This command allows you to unmerge two member profiles that were
  previously merged. For more information, see "Unmerging Member
 Profiles" in Chapter 4.

- ■ **Audit Log**
  This command allows you to a list of the users who accessed the *ui_person*
  table, the date and time of access, and the UIDs of the member profiles
  they accessed. For more information, see "Viewing the User Audit Log"
  in Chapter 3.

- ■ **Change Password**
  This command allows you to change your logon password. You should
  change your password periodically for security reasons. For more
  information, see "Changing Your Logon Password" earlier in this chapter.

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 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.
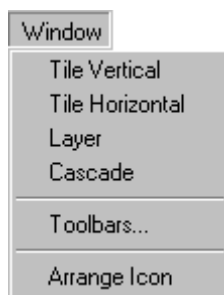
- ■ **Tile Vertical**
  The Tile Vertical option arranges open windows vertically.

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

- ■ **Layer**
 The Layer option brings the open window back to its original size.

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

■ **Arrange Icons**
The Arrange Icons option arranges the icons at a set interval across the window.

■ **Toolbars**
The Toolbars option allows you to customize your display options for the e*Index toolbars and icons. You can define where to place your toolbars and whether to display balloon help or descriptive text along with each toolbar button.

Use the Toolbars window to modify the appearance and location of your toolbar
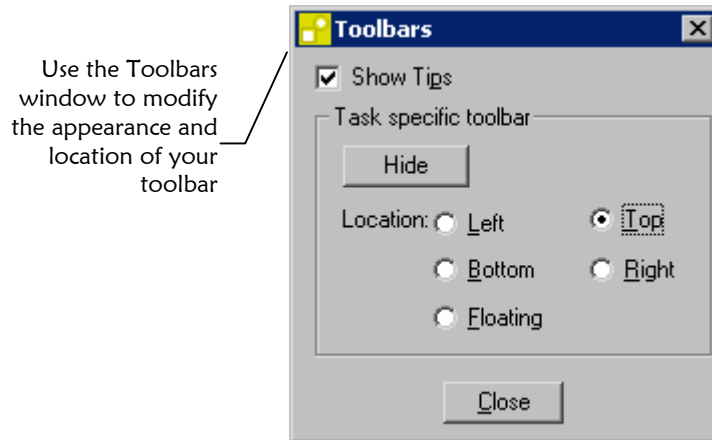
▶ **To customize your toolbar options**

1 From the Main Menu, click **Window** and then click **Toolbars.** The Toolbars dialog appears.

2 Do one of the following:

*To display the toolbar on the left side of the e*Index window*, click the **Left** option.

*To display the toolbar at the top of the e*Index window*, click the **Top** option.

*To display the toolbar on the right side of the e*Index window*, click the **Right** option.

*To display the toolbar at the bottom of the e*Index window*, click the **Bottom** option.

To display the toolbar such that you can move it around the window, click the **Floating** option.

3 To display descriptive text for an icon only when you pass the mouse pointer over it, select the **Show Tips** checkbox.

4 To remove the toolbar from view, click the **Hide** button.
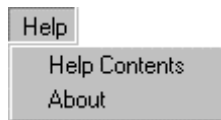
Hide button
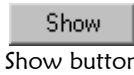
Show

Show button

5   To make the toolbar visible when it is hidden, click the **Show** button.

About the Help Menu

The Help Menu allows you to access e*Index help files and system information including version number, and copyright information.

Help
> Help Contents
> About

- ■ **Help Contents**
  The Help Contents option displays online help to assist you in performing the functions of e*Index.

- ■ **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 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
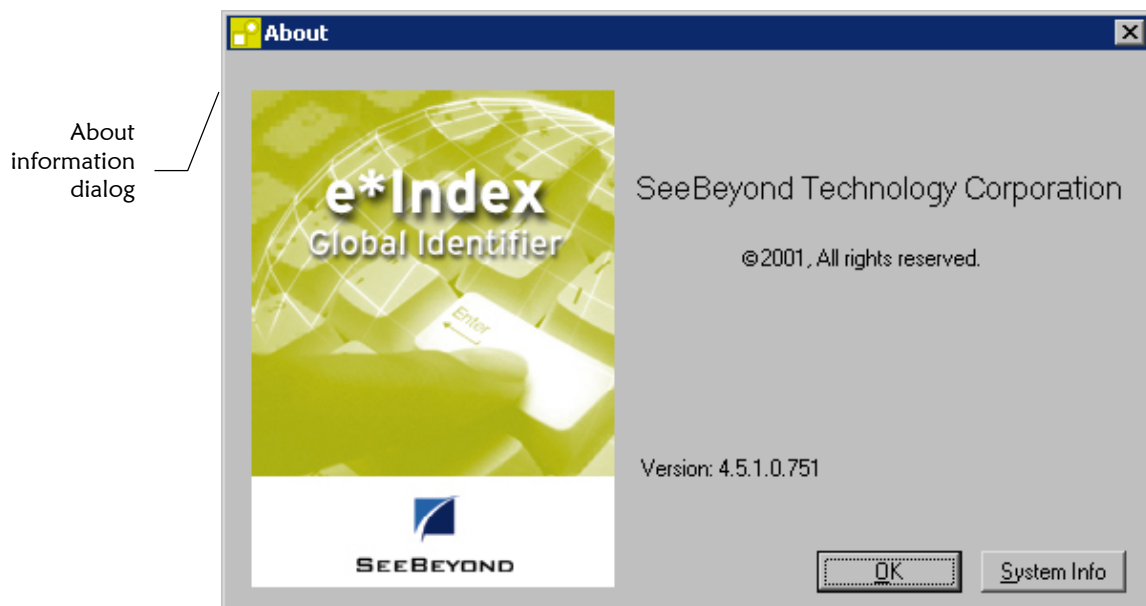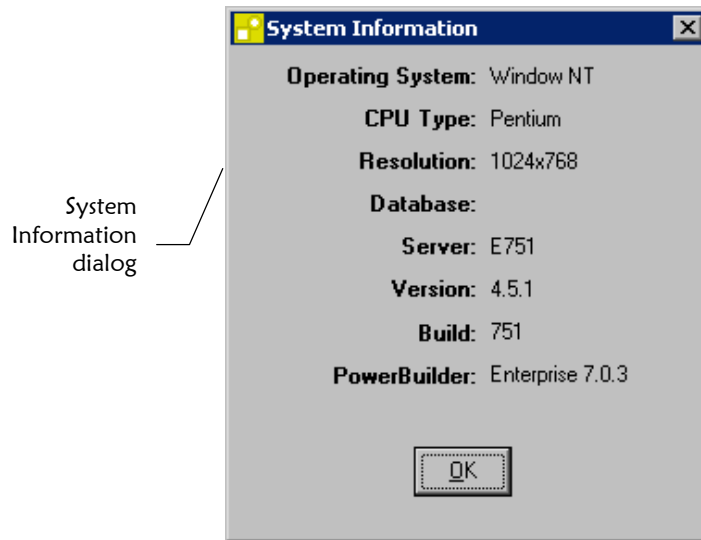
About the Primary Toolbar

The Primary Toolbar gives you quick access to the most frequently used e*Index functions. This toolbar is located just below the Ma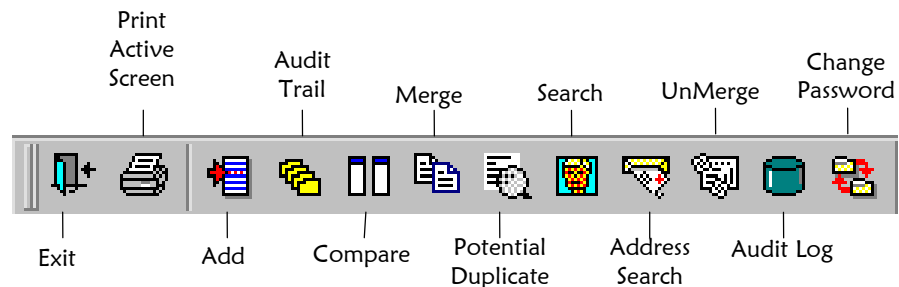in Menu, and includes a set of buttons, or *tools*, to help you quickly access frequently used functions and modules. Since this toolbar is visible at all times, you can access these tools at any time. Depending on which function you access, another toolbar specific to that function appears under the Primary Toolbar.

What are Application Windows?

There are numerous *application windows* in e*Index that you use to perform specific functions. For example, you display the Add window to add a new member to the database.

Main Menu bar

Primary toolbar

Application window toolbar

Labeled box

Tabbed Pages
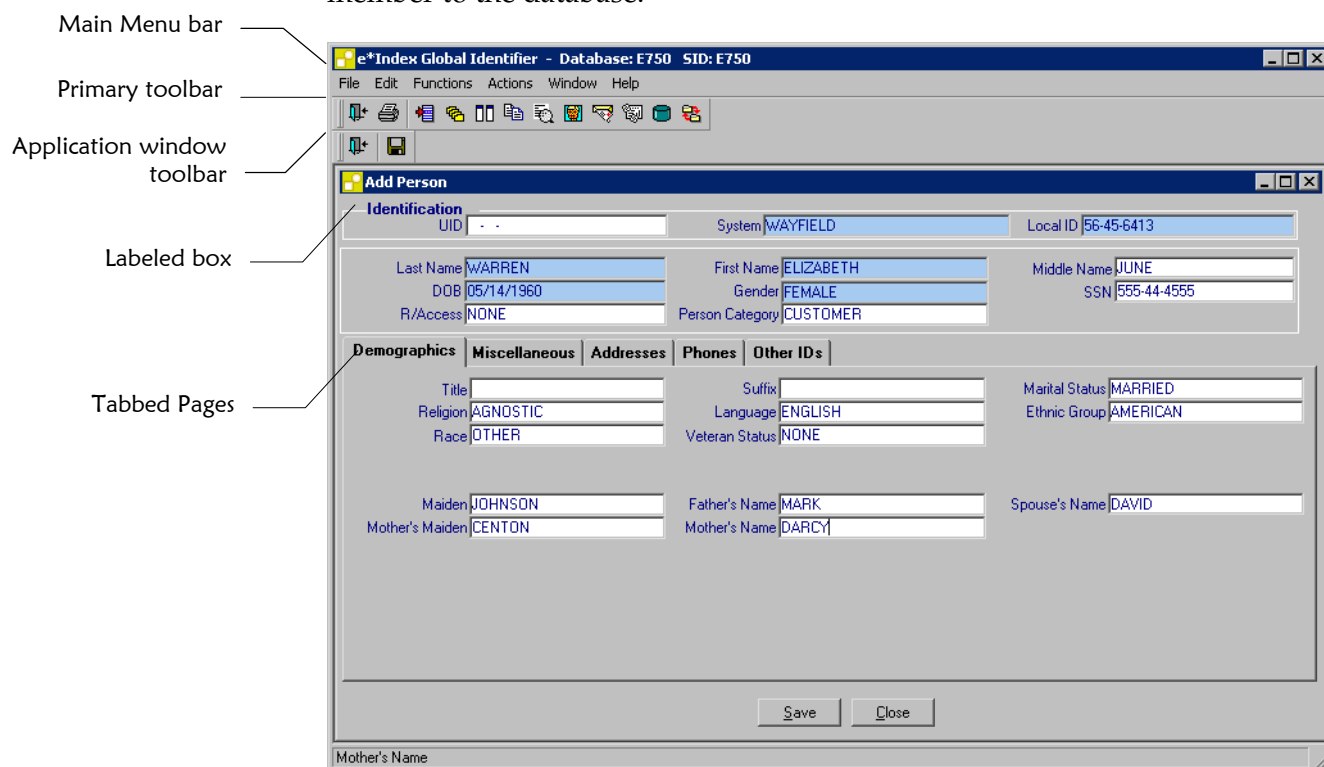
You can perform specific functions on application windows.

There are several components that 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.

■ **Primary toolbar**
The Primary toolbar is located just below the Main Menu bar, and is visible in all application windows. Use the tools on the Primary toolbar to access the primary functions of e*Index.

■ **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 member. Several application windows contain labeled boxes for different types of information.

■ **Tabbed Pages**
Some application windows may contain *tabbed pages*, which display information related to the currently displayed entity. You can use tabbed pages to view, add, modify, and delete 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 function, the following menu is added to the menu bar:

■ **Actions Menu**
Most Actions menus contain a standard set of action commands, such as Save and Close Window, as well as commands that are unique to the displayed window. The Actions menu appears on all windows accessed by the Functions menu, such as the Add, Merge, and Potential Duplicate windows.

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 functions from the Actions menu.

Closes
window

These functions appear on the
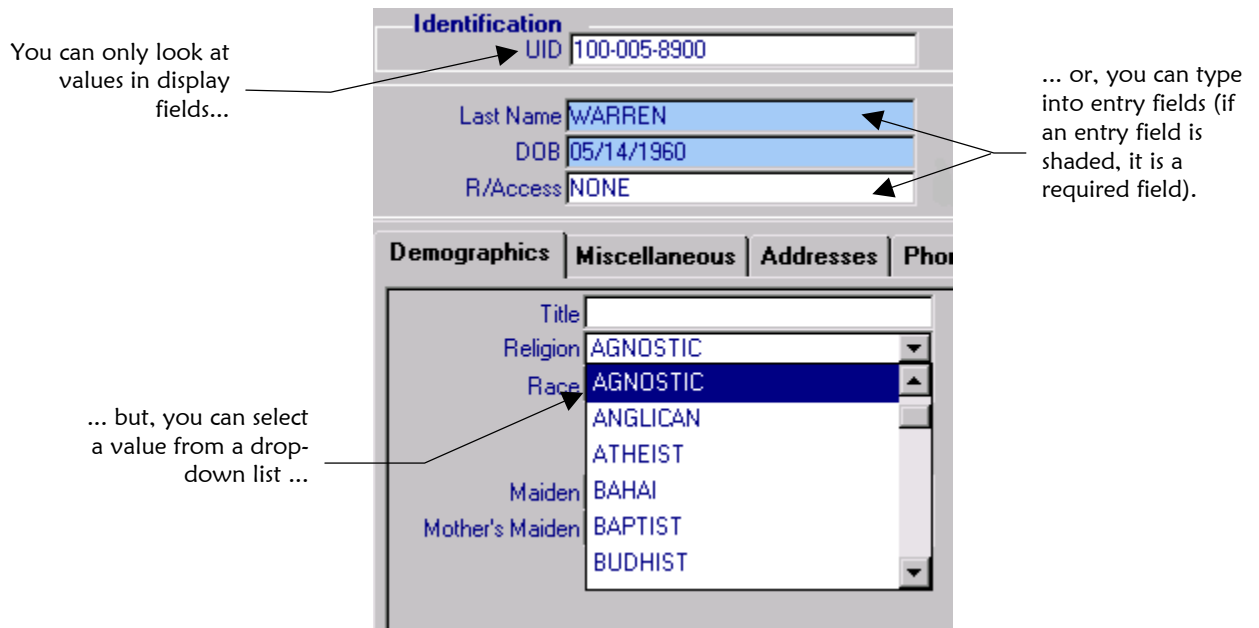window's Actions menu

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 is contained in *fields.* There are several different types of fields, and some are automatically populated by e*Index. 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.

Most of the fields in the e*Index GUI can be configured by the System Administrator so the windows only display information that is pertinent to your business. Field descriptions are provided throughout this document, but the actual fields may vary depending on how your system has been configured.


You can only look at values in display fields...

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

... but, you can select a value from a drop-down list ...

Field Tips:

■ *If you press **Tab** after entering data into certain fields, default values are automatically populated into other fields. For example, if you type a zip code into a zip code field and press **Tab**, the city and state are automatically filled in.*

■ *To quickly enter a value into a field with a drop-down list, click in the field and then type in the first letter of the option you wish to enter. Continue typing the letter until the option you want appears, and then press **Enter**. The correct option is automatically populated into the field.*

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.

The items contained in the drop-down menus are maintained by your System Administrator in the e*Index Administrator. If you cannot find the appropriate option to populate a field, you can request that the option be added by your System Administrator.

Select an option from the list to populate the field

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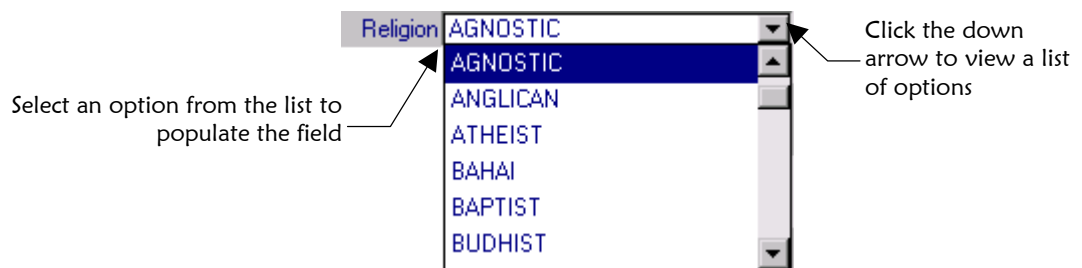
Getting Help

Overview

e*Index provides several user assistance tools to help you look up information you may need to help you perform your tasks. The available user assistance tools include online help, balloon help, microhelp, 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. The help system is provided in HTML format.

Note: To view online help, Internet Explorer 3.02 or higher is required.

▶ 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.

Online help commands

Navigation pane tabbed headings

Navigation pane

Help window

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.*

■ *The information contained in the online help system is also included in the documents in the e*Index electronic library (included on your installation CD). For more information, see "Displaying Online Documentation" later in this chapter.*

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 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 Audit Trail icon

Using Microhelp

Microhelp is a short description of e*Index fields, and it appears at the bottom of the e*Index window in the status bar when you place the cursor in an entry field on an e*Index window.

▶ To view Microhelp

- Click an entry field. A brief description of the field appears on the left side of the status bar.

Microhelp field description ————— Veteran Status
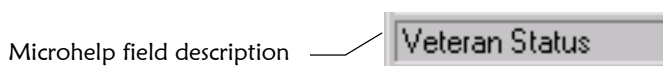
Displaying Online Documentation

SeeBeyond provides online documentation for all e*Index applications 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.

2 Click on the name of the document. The specified document appears in the Acrobat Reader window.

Tip: 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 in the 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.

2 On the Edit menu, select **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 Edit 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 on the name of the document you want to view.

---

*Tip: For more information on the Find tool, see "Finding Words" in the Acrobat Reader online guide (select **Reader Online Guide** from the Acrobat Reader Help menu). For more information on the Search plug-in, select **Plug-In Help** on the Help menu, and then choose **Using Acrobat Search**.*

Exiting e*Index

Overview

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

Logging Off e*Index

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

▶ To exit e*Index

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.**

Exit tool

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

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

Close button

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

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

Viewing Member Information

About this Chapter

Overview

This chapter presents the background information and the step-by-step instructions you need to find and view member profiles in e*Index.

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

About Member Inquiries	Learn about the different types of searches, and the information you need to specify
Search for Members	Learn the step-by-step processes of searching for members
Work with Search Results	Learn how to sort, select, and view the profiles that match your search criteria
View Member Information	Learn how to view detailed information about the profiles that match your search criteria
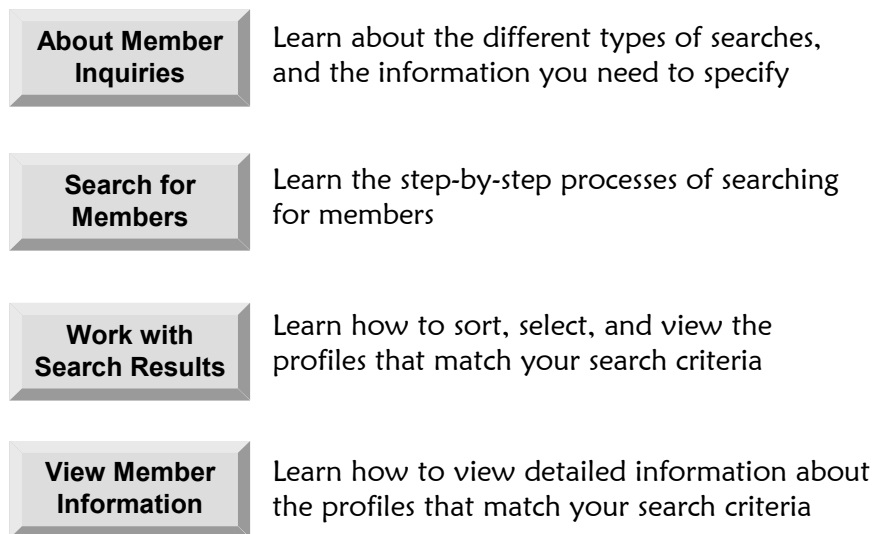
Learning About Member Inquiries

Overview

This section of the chapter provides background information about searching for and viewing member information. Before you can view or update member information, you need to perform a search for the member. There are two different search capabilities within e*Index. You can perform a search against standard demographic information, or you can perform a search against parsed address components.

What is the Search Window?

The design of the demographic search functionality allows you flexibility in designing your database queries. You can narrow a search for a specific individual or a range of individuals using various demographic search fields located on the *Search window*. The Search window is divided into three tabbed pages; you can enter search criteria on the *Standard Search page* or the *General Search page*, and then view your search results on the *Results page*. When you select a specific member from the Results page, detailed information for that person appears on the View/Edit Person window.

What is the Standard Search Page?

The *Standard Search page* of the Search window allows you to perform standard searches against the database using pre-defined combinations of criteria. The member profiles returned by demographic searches on this page are weighted by how closely they match the search criteria. There are six different types of search you can perform on this page: UID Search, Demographic Alphanumeric Search, Demographic Phonetic Search, Social Security Number Search, System/Local ID Search, and Other IDs Search.

What is the General Search Page?

The *General Search page* of the Search window allows you to formulate a search using any combination of data contained in the *ui_person* table. This includes most of the data elements provided on the Standard Search window, and additional elements such as mother's name, father's name, ethnicity, religion, and so on. You must include at least one indexed field in each search. For more information about fields you can use for a general search, see "About General Search Fields" later in this chapter. The member profiles returned from a general search are not weighted by how closely they match the search criteria.

What is the Results Page?

The *Results page* of the Search window displays all the profiles found in the database that match the search criteria you entered. The header beneath the Results tab displays the number of profiles returned on the search. This page displays information to help you identify the correct member profile, such as the UID, name, date of birth, address information, and probability of match for each profile returned from the search. For more information, see "Working with Search Results" later in this chapter.

What is the Address Search Window?

The address search functionality allows you to perform a search for a specific address or set of addresses in the e*Index database. You can narrow the address search using various address search fields located on the *Address Search window*. The Address Search window is divided into two tabbed pages; you can enter address search criteria on the *Address Search page* and then view your search results on the *Address Results page*. When you select a specific member from the Results page, detailed information for that person appears on the View/Edit Person window.

What is the Address Search Page?

The *Address Search page* of the Address Search window allows you to perform searches against the database using various address components. The values you enter into the Address1 through Address4 fields are parsed into their separate components, such as the street name, the street type, street direction, and house number. These values are then compared against the stored parsed components of existing address records in the database in order to find matching records. You can use the remaining address fields to further narrow your search. If you do not know the house number for the address, you can omit the number and enter only the street name into the appropriate address field. This type of search returns the addresses with the specified street name. For example, if you enter **1234 Maple Street** as the search criteria, e*Index looks for a house number of **1234**, a street name of **Maple**, and a street type of **Street**. If you only enter **Maple** as the street address, e*Index returns every address with **Maple** as the street name or with a street name phonetically similar to **Maple**. Member profiles returned by address searches are not assigned a matching weight.

Note: The fields used for address parsing are configurable (in the e*Index Administrator's Country Specific Options function). Check with your System Administrator if you are unsure which fields are used for parsing.

What is the Address Results Page?

The *Address Results page* of the Address Search window displays all the address records in the database that match the search criteria you entered. This page displays information to help you identify the correct address, such as the member's complete address, UID, name, date of birth, and social security number (SSN). For more information, see "Working with Address Search Results" later in this chapter.

What is the View/Edit Person Window?

When you double-click a profile on the Results page from either the Search window or the Address Search window, detailed information about the selected member appears on the View/Edit Person window. This window displays the selected member's identification and demographic information, address and telephone numbers, aliases, local ID and system pairs, and so on. From the View/Edit Person window, you can perform several actions, such as viewing an audit trail of the member, viewing potential duplicate profiles, deactivating the profile, updating member information and so on.

What Types of Searches Can I Perform?

There are several different methods of searching for members, depending on the search criteria you enter. The Standard Search page of the Search window is organized into different sections that allow you to perform six different types of searches based on specific categories of criteria. You can only perform one kind of search at a time, using the fields from only one search section. You can also perform a *general search* on the General Search page and an *address search* on the Address Search page.

Tip: The names of the search types are configurable (except for address and general search). This section describes the searches by their default names, and by the default search criteria. See your System Administrator if you have questions about how your search windows are configured.

■ **Standard UID Search**
You can perform a UID Search using the field in the UID Search section of the Search page. Enter the member's UID (unique global identifier) number to perform an exact match search against the database.

■ **Standard Demographic Alphanumeric Search**
You can perform a Demographic Alphanumeric Search using the fields in the Demographic Search section. Using a combination of required and optional fields, you can form a search as precise or general as you prefer. An alphanumeric search looks for profiles that match the criteria as you

entered it, without allowing for misspellings or typographic errors. Name criteria for alphanumeric searches are not sensitive to case or to diacritical marks.

■ **Demographic Phonetic Search**
The Demographic Phonetic Search function differs from a demographic alphanumeric search in that it returns phonetic variations of the entered name, allowing room for misspellings and typographic errors. Name criteria for phonetic searches are not sensitive to case or to diacritical marks. You can only perform a phonetic search in the Demographic Search section of the Search page.

■ **Social Security Number Search**
A Social Security Number Search is used to perform an exact match search against the database using the member's social security number (SSN) for search criteria. This type of search is performed in the Social Security Search section of the Search page.

■ **System/Local ID Search**
A System/Local ID Search consists of two required fields. The System and the Local ID fields are required to perform a search against the database. To increase search accuracy, you can only select a system listed in the drop-down list. **The criteria in the Local ID field is case-sensitive.**

■ **Non-unique ID Search**
A Non-unique ID Search consists of two required fields. The identification code and the type of ID are required to perform a search against the database. To increase search accuracy, you can only select an ID type listed in the drop-down list for the Other ID Name field.

■ **General Search**
A General Search can consist of as many or few data fields as you want to use. The more data fields you enter as the search criteria, the more specific your search will become. A general search performs a database query against the *ui_person* table, and does not return matching weights for the results of the search. Most name and address fields are not sensitive to case or diacritical marks. You must include at least one indexed field in each search.

■ **Address Search**
An Address Search can consist of any combination of address fields. You can perform partial searches on the street address by only entering the street name. The more data fields you enter as the search criteria, the more specific your search will become. An address search performs a database query against the *ui_address* table, using the parsed street address field components and the phoneticized street name. Parsed fields are not sensitive to case or to diacritical marks. An address search does not return matching weights for the results of the search.

What are Partial and Exact Match Searches?

Within the available standard search types on the Search window, you can perform partial or exact match searches. A *partial search* can only be performed in the Demographic Search section. With this type of search, you can type in just the first few letters of a name and the search returns all profiles with those letters at the beginning of the name. For example, if you type **Wall** in the **Last Name** field, then the search returns profiles with a last name of Wall, Waller, Wallinsky, and so on. An *exact match search* performs a search based on exactly what was typed into the search criteria fields. For example, UID, SSN, and System and Local ID searches are all exact match searches, which means they return only profiles that exactly match your search criteria.

Why do Profiles Appear in Different Colors?

Your System Administrator can configure your e*Index system to display only active profiles or to include deactivated and merged profiles in the results list on the Results page. If you can view deactivated profiles, they appear in fuchsia typeface. If you can view merged profiles, they appear in brown typeface. You can only view deactivated or merged records returned for an alphanumeric search or a general search. These records do not display for a phonetic search unless the configurable query has been modified to allow it.

There is a color legend in the bottom left corner of the Results page to remind you what the different typeface colors signify.

What are Comments?

Additional information about members appears in the form of *comments*. Comments provide information that doesn't appear on the detail windows. Comments can be one of three types.

■ **User-Defined**
A user-defined comment is a free-text comment that you can associate with a member profile to add any information you choose about the member.

■ **Predefined**
Predefined comments allow you to select a comment that has been previously defined by the System Administrator. A predefined comment can be selected from a drop-down list of options.

■ **System-Generated**
When you perform certain functions on a member profile, a system-

generated comment is automatically created for the affected profiles. The functions that create system-generated comments include Add, Potential Duplicate Resolve, Merge, and Unmerge.

What is a Merge History?

You can display a history of the merges that have affected a specific member profile. The merge history appears in tree-view format, similar to Windows explorer. The top level displays the UID of the current active profile. The two profiles at the second level show you the UIDs of the profiles that were merged to form the top-level profile. If there are profiles listed at the third level, they display the UIDs of the profiles that were merged to form the profile above them. There may be several levels of profiles displayed in a member's merge history.

What is the User Audit Log?

The User Audit Log allows you to track and view all instances in which person information was accessed. An audit log entry is created each time the *ui_person* table in the e*Index database is accessed through the e*Index GUI. The audit log keeps a record of each time the *ui_person* table is accessed, along with the database function used to access the table, the logon ID of the user accessing the table, the date and time the table was accessed, and the UIDs of the member profiles that were accessed. This allows you to closely monitor access to the person records in the e*Index database. The Audit Log is only available if the control key *UVAUDITLOG* is enabled.

Searching for Member Profiles

Overview
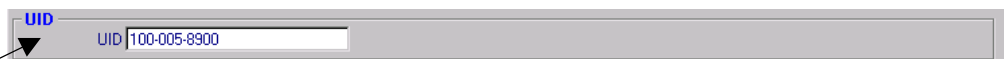
This section provides the step-by-step instructions you need to follow to perform the various types of searches available in e*Index. The search types include:

- Standard UID Search
- Standard Demographic Alphanumeric Search
- Standard Demographic Phonetic Search
- Standard Social Security Number Search
- Standard System/Local ID Search
- Standard Other ID Search
- General Search
- Address Search

Performing a Standard UID Search

To perform a search for a profile using only a member's UID, you need to enter the number in the UID Search section of the Standard Search window. This type of search should result in only one matching profile.

Use the UID Search section on the Standard Search page to perform a search using a member's UID as the criteria

UID
UID 100-005-8900

▶ To perform a standard UID search

Before you begin:

✓ Determine the UID for the person you want to find

Search tool

1 On the Primary toolbar, click **Search**. The Search window appears with the Standard Search page displayed.

2 In the UID Search section, enter the person's UID (for more information, see "About UID Search Fields" following this procedure).

Alpha Search tool

3 Click **Alpha Search**, or press **Enter** to initiate the search. The View/Edit Person window appears displaying detailed information about the member whose UID you entered.

About UID Search Fields
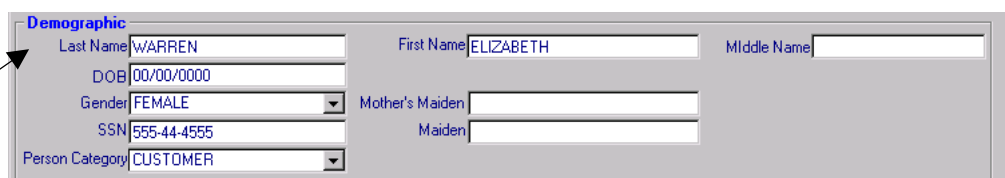
The field located in the UID section of the Search page allows you to enter specific search criteria for a member search.

In this field …	type or select …
UID	The member's unique global identification number, which is assigned by e*Index.
	No default

Performing a Standard Demographic Alphanumeric Search

To perform a standard alphanumeric search in the Demographic Search section of the Standard Search page, you need to specify identifying information for the member, such as their first and last names. The only fields in the demographic search section that are sensitive to case and diacritical marks are **Gender** and **Person Category**. This type of search may result in several matching profiles.

Use the Demographic Search section of the Standard Search page to perform a search using a member's personal information as the criteria

Demographic

Last Name	WARREN
DOB	00/00/0000
Gender	FEMALE
SSN	555-44-4555
Person Category	CUSTOMER

First Name	ELIZABETH
Mother's Maiden	
Maiden	

Middle Name

▶ **To perform a standard demographic alphanumeric search**

Before you begin:

✓ Obtain information about the member whose profile you want to find, such as their first and last names, date of birth, SSN, and so on

Search tool

1 On the Primary toolbar, click **Search**. The Search window appears with the Search page displayed.

2 In the Demographic Search section, enter search criteria for the member you are looking for (for more information, see "About Demographic Search Fields" following this procedure).

*Note: To move from one field to another, press the **Tab** key.*

Alpha Search tool

3 Click **Alpha** Search, or press **Enter** to initiate the search. The Results page appears with a list of matching profiles.

About Demographic Search Fields

The demographic search fields, located in the Demographic Search section of the Standard Search page, allow you to specify search criteria for the member

you want to find. You should make your search as specific as possible.
There are no defaults for these fields.

In this field …	type or select …
Last Name	The last name of the member you want to find. You can perform a partial search by entering only the first few letters of the last name. For example, entering **THO** results in matching profiles with the last name Thompson, Thomsen, Thomas, and so on. *Tip: Your System Administrator can configure a minimum number of characters for a partial match. For example, if the partial match value is three and you enter three or fewer characters, the application searches for the exact name entered. If you enter more than three characters, the application searches for all last names beginning with those characters. This value is specified by the LNEXCTRSRCH control key in e*Index Administrator.*
First Name	The first name of the member you want to find. If you enter a value in this field, a partial search is performed based on the characters entered.
Middle Name/MI	The middle name or initial of the member you want to find.
DOB	The date of birth for the member you want to find.
Range	The number of years plus or minus the year of the date of birth that you want to search in the database. For example, if the value in this field is 10 and you enter 1957 as the year of birth, then your search includes the day and month your entered for the years 1947 through 1967. *Tips:* • *The Range field does not appear on the Search window until you type in a date of birth.* • *Your System Administrator configures the default value for this field, and the field automatically displays once you enter the DOB. You can change the value for the current search only.*
SSN	The social security number of the member.
Mother's Maiden	The maiden name of the member's mother.
Gender	The gender of the member you want to find.
Maiden	The maiden name of the member.
Person Category	The type of member profile for which you are searching, such as customer, employee, patient, and so on.

Performing a Standard Demographic Phonetic Search

To perform a demographic phonetic search in the Demographic Search section of the Standard Search page, you need to specify identifying information for the member, such as their last and first names. The only phonetic search fields that are sensitive to case or diacritical marks are **Gender** and **Mother's Maiden**. This search type may return several matching records.

Use the Demographic Search section of the Standard Search page to perform a search on phonetic variations of a member's name

Demographic

Last Name WARREN	First Name ELIZABETH	MIddle Name
DOB 00/00/0000		
Gender ▾	Mother's Maiden	
SSN . .	Maiden	
Person Category ▾		

▶ **To perform a standard demographic phonetic search**

Before you begin:

✓ Obtain information about the member you want to find, such as their last and first names, date of birth, and so on

[Search tool]

1 On the Primary toolbar, click **Search**. The Search window appears with the Search page displayed.

2 In the Demographic Search section of the Search page, enter search criteria for the member you want to find in one of the allowed combinations. By default, the combinations are as follows:
- Last Name and Mother's Maiden Name
- First Name and Last Name
- First Name, DOB, and Gender
- Social Security Number

Notes:

■ *The System Administrator may have modified the phonetic search criteria so it is different from the above list. If you are unsure of the required criteria, see your System Administrator.*

■ *For more information about these fields, see "About Demographic Search Fields" earlier in this chapter.*

[Phonetic Search tool]

3 Click **Phonetic Search** to initiate the search. The Results page appears with a list of matching profiles.

Performing a Standard Social Security Number Search

To perform a standard search by social security number only, you need to use the Social Security Search section of the Standard Search page. While this

type of search should result in only one matching profile, there may be several resulting matches.

Use the Social Security Search section on the Standard Search window to perform a search for a member by their SSN

Social Security Number
SSN 555-44-4555

▶ **To perform a standard social security number search**

Before you begin:

   ✓ Make sure you have the member's social security number

Search tool

1   On the Primary toolbar, click **Search**. The Search window appears with the Standard Search page displayed.

2   In the Social Security Search section, enter the search criteria (for more information, see "About Social Security Search Fields" later in this chapter).

Alpha Search tool

3   Click **Alpha Search** or press **Enter** to initiate the search. The Results page appears with a list of matching profiles. If there is only one matching profile found, the Results page is bypassed, and the View/Edit Person window appears.

About Social Security Search Fields

The fields located in the Social Security Search section of the Standard Search page allow you to search for a member by their social security number.

In this field …	type …
SSN	The social security number of the member.
	No default

Performing a Standard System/Local ID Search

To find a member by entering their local ID assigned by a specific system, you need to enter their information in the System/Local ID Search section of the Standard Search page. This type of search should result in only one matching profile. If the Local ID field contains alphabetic characters, the criteria is case-sensitive.

Use the System/Local ID Search section of the Standard Search page to search for a member by their local ID in a system

System/Local ID
System RDW   Local ID 89-764512

▶ **To perform a standard system/local ID search**

Before you begin:

✓ Make sure you know the member's local ID in a specific system

Search tool

1 On the Primary toolbar, click **Search**. The Search window appears with the Standard Search page displayed.

2 Enter your search criteria into the System/Local ID Search section (for more information, see "About System/Local ID Search Fields" following this procedure).

Alpha Search tool

3 Click **Alpha Search** or press **Enter** to initiate the search. The Results page is bypassed, and the View/Edit Person window appears.

About System/Local ID Search Fields

The fields in the System/Local ID section of the Standard Search window allow you to search for a member by their local ID. There are no defaults for these fields.

Note: If region-specific security is enabled, you can only search for members associated with systems within the regions to which you are assigned.

In this field …	type or select …
System	The computer system, such as a registration system, for which the member's local ID is known. *Note: This field is required.*
Local ID	The member's unique identification code at the specified system. *Note: This field is required. If alphabetic characters are entered in this field, the search matches the case entered.*

Performing a Standard Non-unique ID Search

To find a member based on a non-unique ID assigned to that member within your organization, you need to enter search criteria into the Other ID section of the Standard Search window. This type of search may result in more than one matching profile.

Use the Other ID Search section of the Standard Search page to search for a member by their non-unique IDs

Other ID	
Other ID Name MIDLAND ▾	Other ID 546-5784-545

▶ **To perform a standard non-unique ID search**

Before you begin:

✓ Make sure you know a non-unique ID assigned to the member within your organization

Search tool

1 On the Primary toolbar, click **Search**. The Search window appears with the Standard Search page displayed.

2 Enter your search criteria into the Other ID Search section (for more information, see "About Non-unique ID Search Fields" following this procedure).

Alpha Search tool

3 Click **Alpha Search** or press **Enter** to initiate the search. The Results page appears with a list of matching profiles. If there is only one matching profile found, the Results page is bypassed, and the View/Edit Person window appears.

About Non-unique ID Search Fields

The fields in the System/Local ID section of the Standard Search window allow you to search for a member by their local ID. There are no defaults for these fields.

In this field …	type or select …
Other ID Name	The type of ID for which the ID number is known.
	Note: This field is required.
Other ID	The member's identification code of the specified type.
	Note: This field is required.

Performing a General Search

To find a member using a combination of search criteria that you choose, use the General Search page on the Search window. When you perform a search from this page, you send a SQL select statement to the database. Most criteria on the General search page are not sensitive to case or diacritical marks; however, the customizable fields in the lower portion of the window (**String1** through **String2**) are always sensitive to case and diacritical marks.

Use the General Search window to perform a database query using a combination of data elements

▶ To perform a general search

Before you begin:

✓ Obtain information about the member whose profile you want to retrieve

1 On the Primary toolbar, click **Search**. The Search window appears with the Standard Search page displayed.

Search tool

2 On the Standard Search window, select the **General Search** tab. The General Search page appears.

3 On the General Search page, fill in the criteria you want to use for your search (for more information about the fields available for the search, see "About General Search Fields" following this procedure). You can use wildcard characters ("?" and "*") in any field except the date fields.

Note to System Administrators: Each General Search must include at least one indexed field. These fields include UID, last name, SSN, and Driver License. To allow greater flexibility in this type of search, you can add new indexes if needed.

General Search tool

4 On the Search toolbar, click **General Search**. The Results page appears with a list of the profiles that match your search criteria.

About General Search Fields

The fields on the General Search page of the of the Search window allow you to search for a member by the search criteria of your choice. There are no defaults for these fields. You can use wildcard characters ("?" and "*") in all but the date fields.

In this field …	type or select …
UID	The UID of the person whose profile you want to retrieve. By default, this is an indexed field.
Last Name	The last name of the person whose profile you want to retrieve. By default, this is an indexed field.
First Name	The first name of the person whose profile you want to retrieve.
Middle Name/MI	The middle name or initial of the person whose profile you want to retrieve.
DOB	The date of birth of the person whose profile you want to retrieve.
Gender	The gender of the person whose profile you want to retrieve.
SSN	The social security number of the person whose profile you want to retrieve. By default, this is an indexed field.
Person Category	The type of member profile for which you are searching, such as customer, employee, patient, and so on.
Suffix	The suffix to the name of the person whose profile you want to retrieve.
Marital Status	The marital status of the person whose profile you want to retrieve, such as Married, Single, and so on.
Title	The title of the person whose profile you want to retrieve.
Language	The language spoken by the person whose profile you want to retrieve.
Ethnic Group	The ethnicity of the person whose profile you want to retrieve.
Religion	The religion or religious denomination of the person whose profile you want to retrieve.
R/Access	An indicator that specifies the VIP status of the person whose profile you want to retrieve.
Veteran Status	An indicator that specifies whether the person whose profile you want to retrieve is a war veteran.
Race	The racial background of the person whose profile you want to retrieve.
Maiden	The maiden name of the person whose profile you want to retrieve.

In this field …	type or select …
Father's Name	The first name of the father of the person whose profile you want to retrieve.
Spouse's Name	The first name of the spouse of the person whose profile you want to retrieve.
Mother's Maiden	The maiden name of the mother of the person whose profile you want to retrieve.
Mother's Name	The first name of the mother of the person whose profile you want to retrieve.
String 1-10	These fields may have been configured by the System Administrator. Please see your System Administrator for more information.
Date 1-5	These fields may have been configured by the System Administrator. Please see your System Administrator for more information.

Performing an Address Search

To search for a member profile using parsed address components, you need to use the Address Search window instead of the regular search window. The Address Search window consists of *parsed fields* and *filter fields*. Parsed fields are separated into their various components and then standardized before the search is carried out. Parsed fields may include Address1, Address2, Address3, and Address4 (depending on how the system administrator has configured the address search). The text you enter into filter fields is the precise text on which the search is performed. Any Address# fields that are not specified to be parsed can be used as filter fields. You can search on any combination of address data.

Use the Address Search window to perform a database query using a combination of address fields

▶ To perform an address search

Before you begin:

✓ Obtain address information for the member profile you want to view

Address Search tool

1 On the Primary toolbar, click **Address Search**. The Address Search window appears with the Address Search page displayed.

2 On the Address Search page, enter the search criteria (for more information, see "About Address Search Fields" following this procedure).

Address Search tool

3 On the Primary toolbar, click **Address Search**. Any matching records appear on the Results page (for more information, see "Working with Address Search Results" later in this chapter).

Address Search Tips:

■ *To include as many matches as possible, you can enter just the street name in a street address field and then narrow down the search by entering information into the filter fields (such as Address Type, City, State, and so on). This returns all address with the specified street name that meet the filter criteria you entered.*

■ *By default, the parsed fields include Address1 and Address2, however the system administrator can specify that any of the Address# fields be parsed). The parsed fields are optimized for searching. The filter fields, which simply help to narrow down the search, include Address Type, City, County, State, Zip, Country, and optionally Address3 and Address4. These fields are not optimized for searching. We recommend that you include at least one optimized field in each search.*

About Address Search Fields

The fields on the Address Search page of the of the Address Search window allow you to search for a member by parsed address information. There are no defaults for these fields. Your system administrator determines which of the Address1 through Address4 fields are parsed. Any of these fields that are not parsed are simply used as filter fields.

In this field …	type or select …
Address Type	The type of member address you want to retrieve, such as home, work, billing, and so on.
Address1 through **Address4**	The street address information for the address you want to retrieve. This can include house number, street name, street type, street direction, location information, unit or suite number, and so on. These fields are not case-sensitive.

In this field …	type or select …
City	The city in which the street address is located.
County	The county in which the street address is located.
State	The state in which the street address is located.
Zip	The zip code and zip code extension associated with the address.
Country	The country in which the address is located.

Working with Search Results

Overview

This section of the chapter describes the Search Results window, and how to sort and select the profiles that match your demographic search. It also describes the Address Search Results window.

Note: If region-specific security is enabled, your search results will only include those profiles that are associated with systems within the regions to which you are assigned.

Sorting the Results of Your Search

The matching profiles that result from a member search appear in table format on the Results page. You can sort the results of a demographic search by any column.

The number of profiles found is shown here

Click on a column heading to sort the profiles by that column

For a demographic search, the search criteria appear here

▶ **To sort the profiles on the Results page**

Before you begin:

✓ Obtain information about the member profiles you want to view

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

2 In the results list that appears on the Results page, click on the column heading of the column by which you want to sort the results (for more information, see "About Results Fields" following this procedure).

About Results Fields

The fields located on the Results page display information to help you to identify the appropriate member.

This field …	displays this information …
UID	The unique global identification number assigned to the member by e*Index.
Last Name and First Name	The last and first names of the member.
Middle Name/MI	The middle name or initial of the member.
DOB	The date the member was born.
Gender	The gender of the member.
SSN	The member's social security number.
Person Category	The person category assigned to the member profile.
Status	The status of the member profile.
Weight	The matching probability weight that indicates how closely each profile matches the criteria you entered. *Note:* *This field only displays for the results of a demographic search.*

Reviewing the Search Criteria

The search criteria that you entered for a demographic search appear at the bottom of the results window. You can view a larger image of the search criteria by double-clicking the row of search criteria at the bottom of the Results page.

Your search criteria appear at the bottom of the Results page

Last Name=WAR, First Name=E, MI=, DOB MM==>DD==>YY=, Mother's Maiden Name=, SEX=F, SSN= - -   ,Maiden Name=
■ Deactivate   ■ Merged

▶ To review the search criteria

Before you begin:

✓   Obtain information about the member profiles you want to view

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

2   Double-click the search criteria that appear at the bottom of the Results page. The User Specified Search Criteria dialog appears, and displays the criteria you entered for the search.

Display the search criteria on the User Specified Search Criteria pop-up window

User Specified Search Criteria

Last Name=WAR
First Name=E
MI=
DOB =00/00/0000
Mother's Maiden Name=
SEX=F
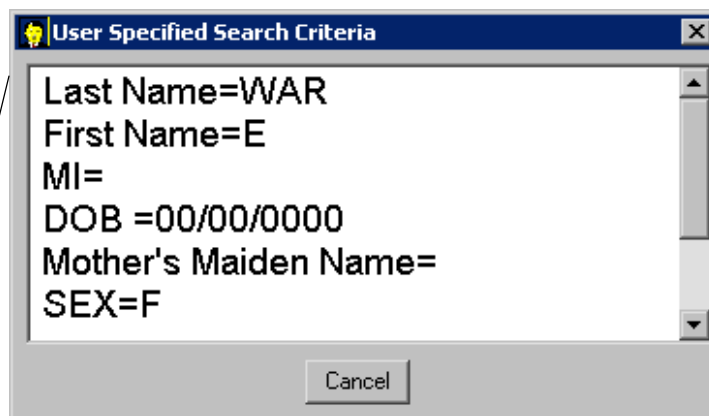
Cancel

3   When you have finished viewing the search criteria, click **Cancel**.

Selecting a Member From the Results List

In order to view detailed information about a member profile that matches your search criteria, you need to select the profile from the results list on the Results page. If you select a profile in error, you can return to the results list by closing the detail window.

Double-click on a member to access detailed information

▶ **To select a profile from the Results list**

Before you begin:

✓ Obtain information about the member profile you want to access

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

2 In the results list that appears on the Results page, double-click the name of the member whose detailed information you want to view, or highlight the row and press **Enter**. The View/Edit Person window appears (for more information, see "Viewing Member Profiles" later in this chapter).

Working with Address Search Results

Address search results display two types of information. The upper portion of the window lists all the matching address records retrieved from the search. The lower portion of the window displays additional information about the member associated with each address so you can determine the best match to your search.

The results of an Address Search appear on the Address Search Results page

▶ **To select a profile from the Results list**

Before you begin:

✓ Obtain information about the member profile you want to access

1 Perform an address search as described under "Performing an Address Search" earlier in this chapter.

2 Select an address record in the upper portion of the window to view information about the member with which the address is associated (for more information, see "About Address Search Results Fields" and "About Address Search Results ID Fields" following this procedure).

3 To view detailed information about the member profile associated with an address in the results list, double click the row containing the address.

About Address Search Results Fields

The fields that appear in the upper portion of the Address Search Results window display information about the address records retrieved from an address search.

This field …	Displays this information …
Address Type	The type of address displayed, such as home, work, billing, and so on.
Address 1 through **Address 4**	The street address information of the address. This can include house number, street name, street type, street direction, location information, unit number, and so on.

This field …	Displays this information …
City	The city in which the street address is located.
State	The state in which the street address is located.
Zip	The zip code and zip code extension associated with the address.
County	The county in which the street address is located.
Country	The country in which the address is located.

About Address Search Results ID Fields

The fields in the lower portion of the Address Search Results page display identifying information for the member profile associated with each address in the results list. The information in the lower portion of the window corresponds to the highlighted record in the upper portion of the window.

This field …	displays this information …
UID	The unique global identification number assigned to the member associated with the selected address.
Status	The current status of the member associated with the selected address.
Last Name	The last name of the member associated with the selected address.
First Name	The first name of the member associated with the selected address.
Middle Name	The middle name or initial of the member associated with the selected address.
DOB	The date of birth of the member associated with the selected address.
Gender	The gender of the member associated with the selected address.
SSN	The social security number of the member associated with the selected address.
Aliases	
Last Name	The last name of the member's alias.
First Name	The first name of the member's alias.
Middle Name	The middle name or initial of the member's alias.
Local IDs	
System	The systems with which the member is associated.
Local Identifier	The local IDs assigned to the member by the listed systems.
Status	The current status of the displayed local ID and system pairs.

Viewing Member Profiles

Overview

This section provides the instructions you need to view information associated with a member profile. The following procedures are included in this section. If region-specific security is enabled, you can only view information for members associated with a system within the regions to which you are assigned. If you are using the French character-set, characters may appear with diacritical marks.

- Viewing a Member's Demographic Information
- Viewing a Member's Customized Information
- Viewing a Member's Addresses
- Viewing a Member's Telephone Numbers
- Viewing a Member's Aliases
- Viewing a Member's Local IDs
- Viewing a Member's Non-unique IDs
- Viewing Comments Associated With a Member
- Viewing a Member's Summary Information
- Viewing a Member's Merge History
- Viewing a Member Profile from a Merge History List
- Viewing the User Audit Log

Important! *The System Administrator can customize the appearance of the e*Index GUIs. The information included in the following topics describes the field names and tab names as they appear in the default version of e*Index. The appearance of your e*Index GUI may differ from the following descriptions.*

Viewing a Member's Demographic Information

Member information appears on the View/Edit Person window in a series of tabbed pages. The same header section appears above each tabbed page, and displays identification information about the member you are viewing. To view a member's demographic information, you need to display the Demographic page.

View demographic information about a member on the Demographic tab of the View/Edit Person window

▶ **To view a member's demographic information**

Before you begin:

✓ Obtain information about the member such as their name, SSN, or UID

✓ Display the Search window

1 Perform a search for the member whose information you want to view (for more information, see "Searching for Member Profiles" earlier in this chapter).

2 On the Results page, double-click the member profile you want to view, or highlight the profile and press **Enter**. The View/Edit Person window appears.

For more information about the identification fields in the upper portion of the window, see "About Identification Fields" following this procedure.

For more information about the demographic fields in the lower portion of the window, see "About Demographic Fields" following this procedure.

3 Do any of the following:

To view additional information about the member, use the scrollbar on the right side of the window.

Mrg Hist tool

To view the merge history of the displayed profile, click **Mrg Hist** on the View/Edit Person toolbar (for more information, see "Viewing a Member's Merge History" later in this chapter).

Note: If this tool is not available, the member does not have a merge history.

Edit tool

To modify member information, click **Edit** on the View/Edit Person toolbar, and then follow the appropriate procedure under "Maintaining Member Information" in Chapter 4 of this guide.

Audit Trail tool

To view a history of transactions for the displayed profile, click **Audit Trail** on the View/Edit Person toolbar (for more information, see "Viewing an Audit Trail" in Chapter 4 of this guide).

Potential Duplicate tool

To view potential duplicates of the displayed profile, click **Pot Dup** on the View/Edit Person toolbar. The Potential Duplicate Detail window appears (for more information, see "Finding Potential Duplicates" in Chapter 4 of this guide).

Note: If the Potential Duplicate tool is not available, then the displayed record has no potential duplicates.

Deactivate tool

To mark the displayed profile as inactive, click **Deactivate** on the View/Edit Person toolbar, and then follow the directions under "Deactivating a Member Profile" in Chapter 4 of this guide).

Next tool

To view detailed information for the following member in the Results list, click **Next** on the View/Edit Person toolbar.

Previous tool

To view detailed information for the preceding member in the Results list, click **Previous** on the View/Edit Person toolbar.

Close button

To exit the View/Edit Person window, click **Close** on the View/Edit Person toolbar.

About Identification Fields

The fields located in the upper portion of the View/Edit Person window allow you to view identification information about a member.

Note: Many fields on the View/Edit Person window are configurable, and may have been modified or hidden by the System Administrator. For more information about fields on your window that differ from those listed below, see the System Administrator. The field descriptions below describe only the default fields that are visible when e*Index is first installed.

This field …	displays this information …
UID	The member's unique global identification number assigned by e*Index.
Status	The current status of the member, such as active or not active.
Update Date	The date and time the member profile was created or was last updated.
User ID	The user logon ID of the user who created or last updated the member profile.
Last Name	The member's last name.
First Name	The member's first name
Middle Name	The middle name or initial of the member.
DOB	The month, day, and year that the member was born.
Gender	The gender of the member.
SSN	The member's social security number.
R/Access	An indicator that specifies the VIP status of the member. *Note: Depending on the value in this field, you may not be able to view certain fields on this window. For example, if the value in this field is either **Employee** or **VIP** and you do not have the access privilege to view VIP information, then the following fields will only display asterisks: SSN, all address and telephone fields, and Mother's Maiden. The value in this field flashes in red text to alert you to either Employee or VIP status.*
Person Category	The type of member whose profile appears, such as employee, patient, customer, vendor, and so on.

About Demographic Fields

The fields located on the Demographic page allow you to view detailed demographic information about a member.

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*Note: The fields on the Demographic page are configurable, and may have been modified or hidden by the System Administrator. For more information about fields on your Demographic page that differ from those listed below, see the System Administrator. The field descriptions below describe only the default fields that are visible when e*Index is first installed.*

This field …	displays this information …
Title	The member's title, such as Ph.D., Medical Doctor, or Reverend.
Suffix	The suffix to the member's name, such as III, Sr., or DDS.

This field …	displays this information …
Marital Status	The member's marital status, such as married, single, divorced, or widowed.
Religion	The name of the member's religion or denomination, such as Agnostic, Catholic, Buddhist, and so on.
Language	The member's first language.
Ethnic Group	The ethnic or cultural background of the member, such as European, French Canadian, Haitian, or African American.
Race	The racial background of the member, such as Asian, White, or Hispanic.
Veteran Status	An indicator that specifies whether the member is a war veteran.
Maiden	The maiden name of the displayed member.
Father	The first name of the member's father.
Spouse	The first name of the member's spouse.
Mother's Maiden	The maiden name of the member's mother.
Mother	The first name of the member's mother.

Viewing a Member's Customized Information

On the Miscellaneous page of the View/Edit Person window, you can view types of member information specified by the System Administrator. For more information about the type of data stored on this page, see your System Administrator. To view this information, you need to perform a search for the member whose information you want to view.

View customized information about a member on the Miscellaneous page of the View/Edit Person window

▶ **To view a member's customized information**

Before you begin:

✓   Perform a search for the member whose information you want to view, and select the appropriate member from the results list

1   On the View/Edit Person window, select the **Miscellaneous** tab. The Miscellaneous page appears.

2   On the Miscellaneous page, view the customized information about the displayed member.

Notes:

■   *You can perform several actions against the displayed member profile, such as viewing an audit trail or merge history, modifying member information, and so on (for more information see step 3 under Viewing a Member's Demographic Information" earlier in this chapter.*

■   *Your System Administrator may have customized the fields on this window. The following example provides a sample of how these fields can be customized.*

The fields on the Miscellaneous page of the View/Edit Person Window may have been customized for your organization

3   When you are finished viewing customized information about the displayed member, click **Close** on the View/Edit Person toolbar, or select another tab on the View/Edit Person window to view additional information about the member.

Close tool

About Customized Fields

The fields located on the Miscellaneous page are designed to allow your organization to store and track customized information about the members in the database. These fields are configurable, and may have been modified or hidden by the System Administrator. For more information about fields on the Miscellaneous page, see the System Administrator. The field descriptions below describe only the default fields that are visible when e*Index is first installed.

This field …	displays this information …
String 1-10	These fields may have been customized to suit your company's specific requirements. For more information about these fields, see the System Administrator.

This field …	displays this information …
	Note: Strings 1 through 6 can hold up to 40 bytes; strings 7 through 9 can hold up to 100 bytes; and string 10 can hold up to 255 bytes.
Date 1-5	You can only use these fields for dates. They may have been customized to suit your company's specific requirements. For more information about these fields, see the System Administrator.

Viewing a Member's Addresses

To view the addresses associated with a member profile, you need to perform a search for the member whose addresses you want to view.

View address information for the displayed member profile on the Addresses page of the View/Edit Person window

▶ To view a member's addresses

Before you begin:

✓ Perform a search for the member whose information you want to view, and select the appropriate member from the results list

1 On the View/Edit Person window, select the **Addresses** tab. The Addresses page appears.

2 Each address with which the member is associated appears in the upper portion of the page, and detailed address information for the highlighted address appears in the lower portion of the page (for more information, see "About Address Fields" following this procedure).

3 To view detailed information about a different address, click the desired address in the addresses list in the upper portion of the page.

Note: You can perform several actions against the displayed member profile, such as viewing an audit trail or merge history, modifying member information, and so on (for more information see step 3 under "Viewing a Member's Demographic Information" earlier in this chapter.

4 When you are finished viewing address information for the displayed member, click **Close** on the View/Edit Person toolbar, or select another tab on the View/Edit Person window to view additional information about the member.

Close tool

About Address Fields

The fields located on the Addresses page of the View/Edit Person window allow you to view detailed address information for the displayed member profile.

Note: The fields on the Addresses page are configurable, and may have been modified or hidden by the System Administrator. For more information about fields on your Addresses page that differ from those listed below, see the System Administrator. The field descriptions below describe only the default fields that are visible when e*Index is first installed.

This field …	displays this information …
Address Type	The type of address displayed, such as home, work, billing, and so on.
Address 1 through Address 4	Up to four lines of the member's home address.
City, State, and Zip	The city, state, and zip code of the member's address, including the 4-digit zip extension.
County	The county in which the member resides.
Country	The country in which the member resides.

Viewing a Member's Telephone Numbers

To view the telephone numbers associated with a member profile, you need to perform a search for the member whose telephone numbers you want to view.

View a member's telephone numbers on the Phone page of the View/Edit Person window

▶ **To view a member's telephone numbers**

Before you begin:

    ✓ Perform a search for the member whose information you want to view, and select the appropriate member from the results list

1 On the View/Edit Person window, select the **Phones** tab. The Phones page appears.

2 Each telephone number with which the member is associated appears on the page (for more information, see "About Telephone Fields" following this procedure).

Note: You can perform several actions against the displayed member profile, such as viewing an audit trail or merge history, modifying member information, and so on (for more information see step 3 under "Viewing a Member's Demographic Information" earlier in this chapter.

Close tool

3 When you are finished viewing telephone information for the displayed member, click **Close** on the View/Edit Person toolbar, or select another tab on the View/Edit Person window to view additional information about the member.

About Telephone Fields

The fields located on the Phones page of the View/Edit Person window allow you to view detailed telephone information for the displayed member profile.

Note: The fields on the Phones page are configurable, and may have been modified or hidden by the System Administrator. For more information about fields on your Phones page that differ from those listed below, see the System Administrator. The field descriptions below describe only the default fields that are visible when e*Index is first installed.

This field …	displays this information …
Phone Type	The type of telephone number you are viewing, such as Home, Work, Cellular, and so on.
Phone	The telephone number for the specified Phone Type.
Ext	The extension to the telephone number, if any.

Viewing a Member's Aliases

To view the various alias names that the displayed member may use, you need to perform a search for the member whose aliases you want to view.

View a member's alias names on the Aliases page of the View/Edit Person window

| Demographics | Miscellaneous | Addresses | Phones | Aliases | Local IDs | Other IDs | Comments |

Last Name	First Name	Middle Name
JOHNSON	ELIZABETH	JUNE
JOHNSON	LIZ	
WARREN	LIZ	

▶ **To view a member's aliases**

Before you begin:

   ✓ Perform a search for the member whose information you want to view, and select the appropriate member from the results list

1 On the View/Edit Person window, select the **Aliases** tab. The Aliases page appears.

2 Each alias used by the displayed member appears on the page (for more information, see "About Alias Fields" following this procedure).

Note: You can perform several actions against the displayed member profile, such as viewing an audit trail or merge history, modifying member information, and so on (for more information see step 3 under "Viewing a Member's Demographic Information" earlier in this chapter.

Close tool

3 When you are finished viewing alias information for the displayed member, click **Close** on the View/Edit Person toolbar, or select another tab on the View/Edit Person window to view additional information about the member.

About Alias Fields

The fields located on the Aliases page of the View/Edit Person window allow you to view a member's aliases. These names may include nicknames, middle names, or any other names that were previously used by the member.

Note: The fields on the Aliases page are configurable, and may have been modified or hidden by the System Administrator. For more information about fields on your Aliases page that differ from those listed below, see the System Administrator. The field descriptions below describe only the default fields that are visible when e*Index is first installed.

This field …	displays this information …
Last Name	The last name of the member's alias name.
First Name	The first name of the member's alias name.
Middle Name	The middle name of the member's alias name.

Viewing a Member's Local IDs

To view the local IDs assigned to a member by the systems at which they were registered, you first need to perform a search for the member profile.

View a member's
Local ID information
on the Local IDs
page of the
View/Edit Person
window

▶ To view a member's local IDs

Before you begin:

✓ Perform a search for the member whose information you want to view, and select the appropriate member from the results list

1 On the View/Edit Person window, select the **Local IDs** tab. The Local IDs page appears.

2 All local IDs, both active and inactive, assigned to the displayed member appear on the page (for more information, see "About Local ID Fields" following this procedure).

> *Note: You can perform several actions against the displayed member profile, such as viewing an audit trail or merge history, modifying member information, and so on (for more information see step 3 under "Viewing a Member's Demographic Information" earlier in this chapter.*

3 To view the original UID associated with a specific local ID, right-click on the row containing that local ID. The Original UID pop-up window appears. This is useful when viewing a member profile that has been merged.

The Original UID pop-up window displays the UID originally associated with the local ID

Original UID

UID 100-000-0012

Close

4 When you are finished viewing local ID information for the displayed member, click **Close** on the View/Edit Person toolbar, or select another tab on the View/Edit Person window to view additional information about the member.

Close tool

About Local ID Fields

The fields located on the Local IDs page of the View/Edit Person window allow you to view a member's local IDs within the various systems in your organization. If you have associated counties with the systems in e*Index, then local ID and system pairs are listed in alphabetic order by county name.

> *Note: The fields on the Local IDs page are configurable, and may have been modified or hidden by the System Administrator. For more information about fields on your Local IDs page that differ from those listed below, see the System Administrator. The field descriptions below describe only the default fields that are visible when e*Index is first installed.*

This field …	displays this information …
System	The computer system, such as a registration system, in which the local ID was assigned.
Local Identifier	The local ID assigned to the member by the corresponding system. *Note: If the local ID appears in fuchsia, the ID is deactivated; if it appears in brown, it has been merged.*
Status	The status of the local ID, indicating whether the local ID is currently active or inactive.

Viewing a Member's Non-unique IDs

The system and ID pairs displayed on the Local IDs page are unique to each member. To view a member's *non-unique* IDs, you need to display the Other IDs page.

View a member's non-unique IDs on the Other IDs page of the View/Edit Person window

| Demographics | Miscellaneous | Addresses | Phones | Aliases | Local IDs | **Other IDs** | Comments |

Other ID Name	ID
MIDLAND	AD4-357-8F
SUMMARY ACCT	AD-204-8209

▶ **To view a member's non-unique IDs**

Before you begin:

✓ Perform a search for the member whose information you want to view, and select the appropriate member from the results list

1 On the View/Edit Person window, select the **Other IDs** tab. The Other IDs page appears.

2 All non-unique IDs assigned to the displayed member appear on the page (for more information, see "About Other ID Fields" following this procedure).

Note: You can perform several actions against the displayed member profile, such as viewing an audit trail or merge history, modifying member information, and so on (for more information see step 3 under "Viewing a Member's Demographic Information" earlier in this chapter.

Close tool

3 When you are finished viewing other ID information for the displayed member, click **Close** on the View/Edit Person toolbar, or select another tab on the View/Edit Person window to view additional information about the member.

About Other ID Fields

The fields located on the Other IDs page of the View/Edit Person window allow you to view a member's non-unique IDs assigned within your organization.

Note: The fields on the Other IDs page are configurable, and may have been modified or hidden by the System Administrator. For more information about fields on your Other IDs page that differ from those listed below, see the System Administrator. The field descriptions below describe only the default fields that are visible when e*Index is first installed.

This field …	displays this information …
Other ID Name	The name of the ID type for which the non-unique ID was assigned.
ID	The identification code assigned to the member that corresponds with the specified ID Name.

Viewing Comments Associated with a Member

When you add, merge, unmerge, or resolve member profiles, comments are automatically associated with those profiles. Users can also add their own comments to a profile. To view any comments associated with a member profile, you first need to perform a search for the member profile.

View comments associated with a member on the Comments page of the View/Edit Person window

▶ **To view comments associated with a member**

Before you begin:

✓ Perform a search for the member whose information you want to view, and select the appropriate member from the results list

1 On the View/Edit Person window, click the **Comments** tab. The Comments page appears.

2 View the comments associated with the member (for more information, see "About Comments Fields" following this procedure).

3 If the entire contents of a comment are not visible on the Comments window, use the scrollbar to the right of the comment to scroll through the contents of the comment.
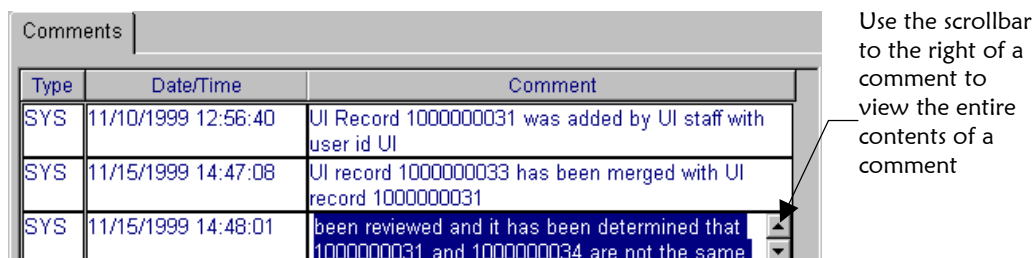
Use the scrollbar to the right of a comment to view the entire contents of a comment

Note: You can perform several actions against the displayed member profile, such as viewing an audit trail or merge history, modifying member information, and so on (for more information see step 3 under "Viewing a Member's Demographic Information" earlier in this chapter.

Close tool

4 When you are finished viewing comments for the displayed member, click **Close** on the View/Edit Person toolbar, or select another tab on the View/Edit Person window to view additional information about the member.

About Comments Fields

The fields located on the Comments window allow you to view any comments associated with the displayed member.

This field …	displays this information …
Type	The type of comment displayed, such as user-defined, predefined, or system-generated.
Date/Time	The date and time that the displayed comment was created.
Comment	The text of the comment.

Viewing a Member's Summary Information

Your System Administrator can configure the e*Index View/Edit Person window so an additional tabbed page appears. This tab displays summary information about the selected member profile. By default, this tab is named Summary, but it may be renamed by the System Administrator.

> *Note: When this page is enabled (by the PVSUMMARY control key), it appears when a member profile is first accessed, allowing you to immediately view key data about a member, such as their local IDs, address information, aliases, and so on.*

View a member's summary information on the Summary page of the View/Edit Person window

▶ To view a member's summary information

Before you begin:

✓   Perform a search for the member whose information you want to view, and select the appropriate member from the results list

1   If the Summary page is not displayed, click the **Summary** tab on the View/Edit Person window. The Summary page appears.

2   View the member's summary information (for more information, see "About Summary Fields" following this procedure).

About Summary Fields

The fields located on the Summary page allow you to view a summary of key information about the selected member.

> *Note: The fields on the Summary page, and the name of the Summary tab itself, are configurable, and may have been modified or hidden by the System Administrator. For more information about fields on this page that differ from those listed below, see the System Administrator. The field descriptions below describe only the default fields that are visible when e*Index is first installed.*

This field …	displays this information …
Primary Address	
Address1 through **Address4**	The street address information of the address type specified for the Summary tab.
	Note: You can specify the address type to display on this tab using the Country Specific Option function of e*Index Administrator. For more information, see "Configuring Country-Specific Options" in Chapter 5 of the e*Index Administrator User's Guide.
City	The city in which the street address is located.
State	The state in which the street address is located.
County	The county in which the street address is located.
Zip	The zip code and zip code extension associated with the address.
Country	The country in which the address is located.
Primary Phone	
Phone	The telephone number of the phone type specified for the Summary tab.
	Note: You can specify the phone type to display on this tab using the Country Specific Option function of e*Index Administrator. For more information, see "Configuring Country-Specific Options" in Chapter 5 of the e*Index Administrator User's Guide.
Ext	The telephone number extension, if any.
Miscellaneous	
Father's Name	The name of the member's father.
Mother's Name	The name of the member's mother.
Spouse's Name	The name of the member's spouse.
Maiden	The member's maiden name.
Suffix	A suffix to the member's name.
Race	The racial group to which the member belongs.
Ethnic Group	The ethnic group to which the member belongs.
Aliases	
Last Name	The last name of the member's alias.
First Name	The first name of the member's alias.
Middle Name	The middle name or initial of the member's alias.
Local IDs	
System	The systems with which the member is associated.
Local Identifier	The local IDs assigned to the member by the listed

This field …	displays this information …
	systems.
Status	The current status of the displayed local ID and system pairs.

Viewing a Member's Merge History

When you have a member profile displayed on the View/Edit Person window, you can display a history of all merges performed against the profile, allowing you to trace the origin of certain information contained in the profile.

View a history of a member's merges on the Merge History dialog
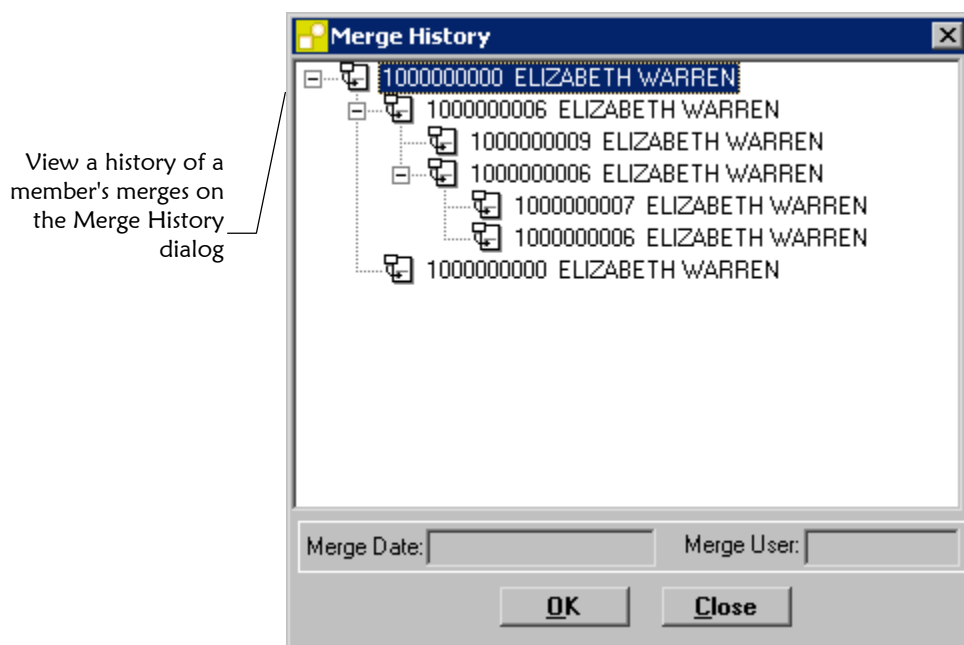
▶ **To view a member's merge history**

Before you begin:

✓ Display the member whose merge history you want to view on the View/Edit Person window

Mrg Hist tool

1 On the View/Edit Person toolbar, click **Merge History**. The Merge History dialog appears.

2   View the member's merge history. The merge history appears in a tree structure, showing each pair of profiles that were merged under the displayed member profile.

These two profiles were merged to form profile 1000000006 above

These two profiles were merged to form the profile at the top level
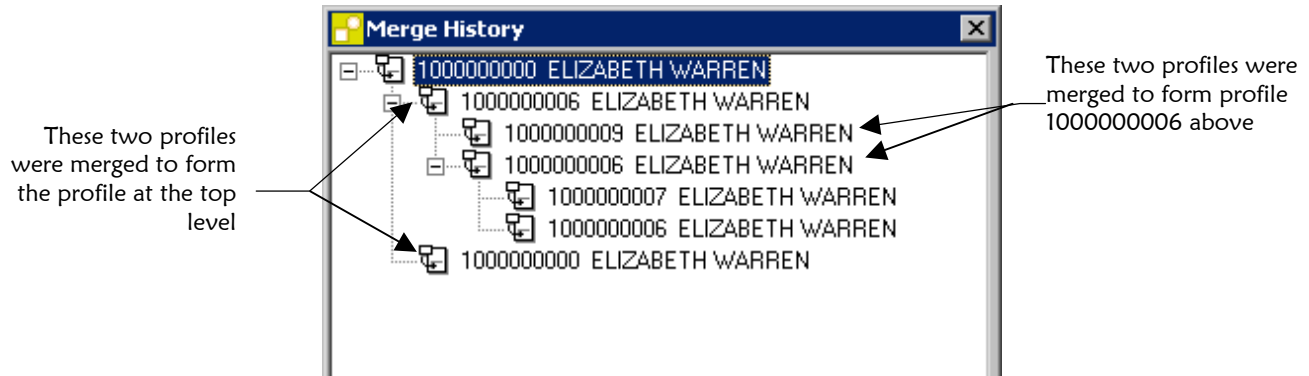
3   To view the date and time that a profile was merged, as well as the user ID of the user who performed the merge, click on the profile above the merged pair. The information appears in the lower portion of the window.

Information about the merge appears at the bottom of the dialog

Merge Date: 12/21/2000 18:52:48   Merge User: UI

Close button
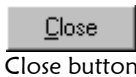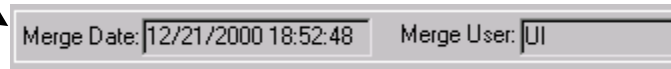
4   When you are finished viewing the merge history, click **Close**. The Merge History dialog closes, and the View/Edit Person window reappears.

Viewing a Member Profile From a Merge History List

When you view a member's merge history, you can also view detailed information for each member profile in the merge history list. The profiles you display from the merge history list contain the information about the profile before the merge occurred.

You can access the View/Edit Person window for any profile in a merge history list
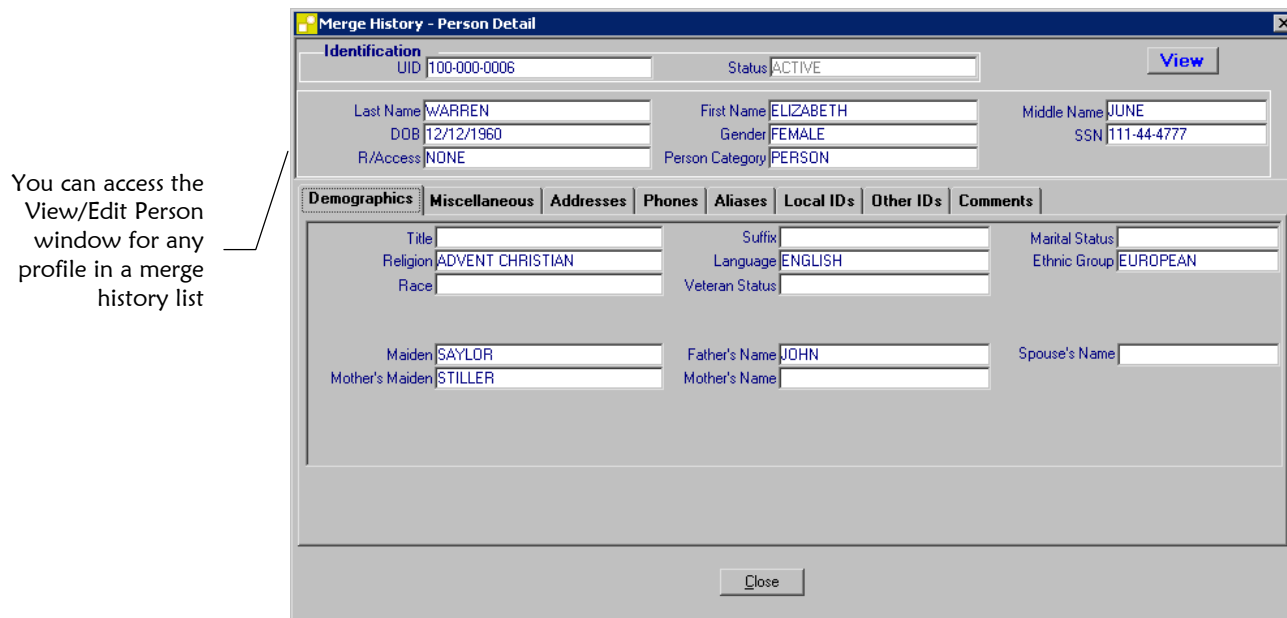
▶ To view a member profile from a merge history list

Before you begin:

✓ Display a merge history list, as described in "Viewing a Member's Merge History" earlier in this section

1 Expand the list on the Merge History window until you see the UID of the member profile you want to view.

Double-click a profile to view detailed information about the profile
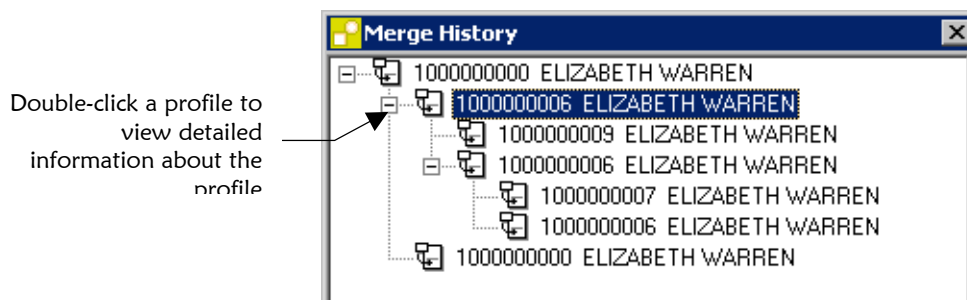
2 On the Merge History window, double-click the member profile you want to view. The View/Edit Person window appears, and displays the detailed information for the member profile you selected.

Note: *If you select a profile with a status of* **Merged***, you'll notice that the member's system and local ID pairs and alias names are not visible. This information has been moved to the corresponding active member profile. For example, if the member profile with a UID of 10001 was merged into the profile with a UID of 10002, then all of the alias and local ID information for profile 10001 is moved into profile 10002.*

Close

Close button
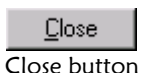
3 To return to the merge history list, click **Close** on the View/Edit Person window. The merge history dialog reappears, and you can view detailed information for another merged member profile.

Viewing the User Audit Log

Using the User Audit Log function, you can view each instance an e*Index user accessed information in the *ui_person* table. The User Audit Log stores a list of instances in which this information was accessed.

View a list of Audit Log records on the Audit Log Results page

▶ **To view the User Audit Log**

Before you begin:

✓ Determine a time period during which the instances you want to view occurred

Audit Log tool

1   On the primary toolbar, click **Audit Log**. The Audit Log Search
window appears with the Search page displayed.

Enter search criteria
for the Audit Log
entries you want to
view on the Audit
Log Search page

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

Search tool

3   On the Audit Log Search toolbar, click **Search**. The Results page
appears with a list of instances in which the *ui_person* table was
accessed. For information about the information displayed on this
page, see "About Audit Log Results Fields" following this procedure.

4   To view additional information about a specific audit log entry,
double-click the row containing the entry you want to view.

If the entry involves only one member profile, the View/Edit Person
Window appears, displaying the selected member profile.

If the entry involves two member profiles, the Select Person dialog
appears, allowing you to choose the profile you want to view.

• Select the appropriate radio dial and then click **OK**.

Select Person
dialog

• The View/Edit Person window appears, displaying the
selected member profile.

Selecting a User Audit Log entry displays the View/Edit Person window for the selected profile

5   For information about the functions you can perform from the View/Edit Person window, see "Viewing a Member's Demographic Information" earlier in this chapter.

About Audit Log Search Fields

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

In this field …	type or select …
UID	The UID of the member profile whose information you want to view.
User ID	The logon ID of the user whose access to *ui_person* you want to view.
Start Date/Time	The earliest date for which you want to view audit log information.
End Date/Time	The latest date for which you want to view audit log information.

About Audit Log Results Fields

The fields located on the Results page of the Audit Log Search window display information about the instances the *ui_person* table was accessed that match the search criteria you entered.

This field …	displays this information …
User ID	The logon ID of the user who accessed the *ui_person* table.
Date/Time	The date and time that the *ui_person* table was accessed.
UID1	The UID of the member profile whose information was accessed.
UID2	The UID of the second member profile whose information was accessed at the same time (as would occur in the case of a profile comparison or merge).
Function	The primary e*Index function that was used to access the *ui_person* table, such as Add, Merge, Compare, and so on.
Detail	Specific information about the actions taken against the information in the database, such as View Search Results, Merge, View Search Results, and so on.

Adding and Maintaining Member Profiles

About this Chapter

Overview

This chapter presents the background information and the step-by-step instructions you need to add and maintain member information in e*Index.

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

About Member Profiles	Learn about the information contained in a member profile, and the methods you can use to keep that information accurate
Add Member Profiles	Learn the step-by-step process of adding members to e*Index
Compare Member Information	Learn how to view changes to member information, and to compare differences between two member profiles
Maintain Member Information	Learn the step-by-step processes of updating and maintaining member profiles

Learning About Member Profiles

Overview

This section of the chapter provides background information about the information you specify when you add and modify member information. It also provides an overview of the procedures you can perform to keep the information current and accurate.

What is a Member Profile?

A *member profile* is a set of information that describes characteristics of an individual member. When you add a member to e*Index, you can enter information such as:

■   Identifying information about the member, including their name and a local identifier within a specific system

■   Demographic information about the member, such as their date of birth, ethnicity, and gender

■   The member's current address and telephone numbers

■   Information about the member's family, such as their maiden name, their spouse's name, and their parent's names

■   Alias names or nicknames used by the member

■   Information about the member that is specific to your business requirements

What Identification Numbers are Assigned to each Member?

You will notice that each member you add is assigned a unique identification number in addition to the local IDs you specify. Each person has one unique identification number throughout your business enterprise, and an identification number within each system with which they are registered. Members may also have several non-unique IDs, meaning that they may share these ID numbers with other members.

■   **UID**
    Every member in the e*Index system is assigned a unique identification number. This number is the same for that member regardless of the system from which the member information originates. This number is called the unique global identifier (UID), and is used to cross-reference

member profiles in order to accurately identify the members throughout your business enterprise.

■ **Local ID**
A local ID is the unique local identification number that is assigned to a member at each system at which they are registered. These numbers are assigned using a numbering system unique to each system, and are used internally by the systems to identify member profiles. e*Index uses a member's UID to cross-reference their local IDs in different systems.

■ **Non-unique IDs**
A non-unique ID is an identification code that does not necessarily uniquely identify a member within the database, but may uniquely identify a group of members. For example, if a family shares the same account or insurance policy, every member of the family would have the same identification code for that account or policy.

What is Member Maintenance?

Member maintenance involves a number of tasks that you can perform to ensure that the member information in your database is the most current and accurate information. The tasks you can perform include editing, adding, and deleting member information, comparing member information, detecting and fixing profiles that are potential duplicates of each other, merging and unmerging profiles, and deactivating member profiles that are no longer active. You can deactivate a member's local IDs when they are no longer active, but you cannot delete local IDs. In addition, you can change the status of a member's local IDs.

How Does Region-Specific Security Affect Member Maintenance?

If region-specific security is installed in the e*Index database, you may not be able to maintain all member profiles. You can only add, merge, update, deactivate, and unmerge profiles that are associated with systems that are within the region to which you are assigned. This also means you can only view comparisons and potential duplicates for the member profiles that fall within your region. For more information about region-specific security, see Chapter 3 of the *e*Index Security User's Guide*.

What is an Audit Trail?

You can view a history of changes made to a member's information using the *Audit Trail* function. The audit trail stores a before and after image of a member's profiles each time an event occurs that changes the member's data. The audit trail also contains information on activities within the application triggered from any interface and any online function (such as an update or merge). You can trace the events that modified a member profile from the time the profile was added in e*Index to the most previous transaction, **including merged and deactivated profiles. You** can view the before and after **images side-by-side online or you can print the** audit trail to a default printer.

What is a Matching Probability Weight?

When you add a new member profile to e*Index, the new profile is automatically checked for any similarities with the profiles that already exist in the database. A *matching probability weight* between existing profiles and the new profile is then calculated using matching algorithm logic. This weight indicates how closely the two profiles match each other. If the matching probability weight for two profiles is above a specific number (defined by the System Administrator), then the profiles are considered potential duplicates. If the weight between two profiles is high enough, they may be automatically merged (for more information, see "What is an Automatic Merge?" later in this section).

What are Potential Duplicates?

Potential duplicates are two member profiles that possibly represent the same member. If you add a new member and e*Index determines that the member you are adding may already exist in the database, the two profiles are flagged as potential duplicates of one another. Profiles are flagged as potential duplicates if the probability of a match between the two profiles is above the duplicate threshold specified by the System Administrator. Because member information is entered from various sources, a member profile may have several potential duplicates. In this case, it is important to identify the potential duplicates, and to determine whether the profiles represent the same member.

The duplicate threshold is defined in the control keys in e*Index Administrator. See your *e*Index Administrator User's Guide* for more information.

How Do I Fix Potential Duplicates?

The Potential Duplicate function locates any profiles that are similar enough that they could represent the same member. You can compare potential duplicate profiles to determine if they do represent the same member. Once you have determined whether the profiles are duplicates, you can use one of the following methods to remove the potential duplicate flag.

- **Merge**
  If you conclude that the profiles represent the same member, you need to determine which information is the most current and then merge the profiles. When you perform a merge, the information from one profile is retained as the most accurate and up-to-date information. The information from the other profile is added to that member's history information. You can also choose specific information from each profile to be saved in the new member profile. This is known as a field level merge.

- **Resolve**
  If you conclude that the two profiles do not represent the same member, you can mark the profiles as being resolved. Doing this does not change any information for either profile, but it does remove the potential duplicate flag. The profiles are no longer marked as potential duplicates of one another, and they no longer appear on the Potential Duplicate Report.

What are the 'Merge From' and the 'Merge To' Profiles?

When you perform a merge, you are working with two member profiles. The 'merge from' profile is the profile that contains the obsolete member information. Usually, very little or none of the information in this profile is retained in the newly merged profile. The 'merge to' profile contains the most current member information, and most or all of the information in this profile is retained in the newly merged profile. The UID of the 'merge to' profile is always retained. The information that is discarded during a merge is stored in a history table, making it possible to restore the profiles to their previous status if they were merged in error.

Can Merged Records be Unmerged?

If you merge two member records in error, you can unmerge the records and return them to their original states. Any modifications that were made to the kept record after the merge will be lost. You may want to print out the merged profile before unmerging it so you can verify that the resulting profiles contain the most current information.

Note: If you have region-specific security installed, then you can only unmerge member profiles that are associated with the systems in your region.

What is an Automatic Merge?

If you add a new member and e*Index determines that the member you are adding already exists in the database, then an automatic merge occurs. An automatic merge simply updates the existing profile in the database with the information that you have specified for the new profile. An automatic merge only occurs when the probability of a match between the new profile and the existing profile is above the match threshold specified by your System Administrator. Automatic merges are also known as assumed match. If the assumed match option is enabled, then all records that are merged automatically are written to the assumed match table.

The match threshold and assumed match option are defined in the control keys in e*Index Administrator. See your *e*Index Administrator User's Guide* for more information.

Adding a Member profile

Overview

This section provides the step-by-step instructions you need in order to add member profiles to e*Index. Adding a member profile includes the following steps:

- Step 1: Obtain Information About the Member
- Step 2: Specify Identifying and Demographic Information
- Step 3: Specify Customized Information
- Step 4: Specify Address Information
- Step 5: Specify Telephone Information
- Step 6: Specify Non-unique IDs
- Step 7: Save the Member Profile

Note: Steps 3 through 6 are optional, and can be performed in any order. You must specify certain information in step 2 in order to add a member profile to the database, and you must complete "Step 7: Save the Member Profile" after you specify member information.

Step 1: Obtain Information About the Member

Before you begin to add a new member to e*Index, you should obtain certain information about the member. For example, you will need to enter the member's name, SSN, date of birth, and other identifying information. If necessary, review the descriptions of the fields you encounter while adding a new member. These descriptions, provided throughout this section, will help you to determine the information you need to specify for each new member.

Step 2: Specify Identifying and Demographic Information

When you add a new member to the e*Index database, you need to add certain information such as the member's name, the system in which they were registered, and a local ID for that system.

Use the Add
Person window
to add a new
member to the
database

▶ **To specify identifying and demographic information**

Before you begin:

✓ Obtain information about the member, such as their first and last names, date of birth, and gender

Add tool

1 On the Primary toolbar, click **Add**. The Add Person window appears with the Demographics page displayed.

2 In the upper portion of the Add Person window, enter identifying information for the new member (for more information, see "About Identification Fields on the Add Person window" following this procedure).

3 On the Demographics page in the lower portion of the Add Person window, enter the member's demographic information (for more information, see "About Demographic Fields" in Chapter 3 of this guide).

4 Continue to "Step 3: Specify Customized Information."

Maintenance Tips — Demographic and Identifying Information

Once you have saved a new member profile, you can add, edit, and remove demographic and identifying information.

To modify a member*'s identifying information:* see "Modifying Identification Information" later in this chapter.

To modify a member*'s demographic information:* see "Modifying Demographic Information" later in this chapter.

About Identification Fields on the Add Person window

The fields located in the upper portion of the Add Person window allow you to specify identifying information about the member you are adding. There are no default values populated in these fields.

Note: Many fields on the Add Person window are configurable, and may have been modified or hidden by the System Administrator. For more information about fields on your window that differ from those listed below, see the System Administrator. The field descriptions below describe only the default fields that are visible when e*Index is first installed.

In this field …	type or select …
System	The name of the system in which the member was assigned a local ID (such as a registration system).
Local ID	The member's unique identification code in the specified system. The local ID can contain upper and lower case alphanumeric characters depending on the format defined by the specified system.
Last Name	The member's last name.
First Name	The first name of the member.
Middle Name	The member's middle name or initial.
DOB	The month, day, and year that the member was born.
Gender	The gender of the member.
SSN	The member's social security number.
R/Access	An indicator that specifies whether the member's address and telephone information should be masked. Select **VIP** or **Employee** to mask this information to users without the proper access privileges.
Person Category	The type of member whose profile you are adding, such as employee, patient, customer, vendor, and so on.

This field …	displays this information …
UID	The member's unique identifier assigned by e*Index.
	Note: *This field is not populated until the profile is saved to the database.*

Step 3: Specify Customized Information

Once you have specified the required identification information for a member, you can specify customized information about that member. Customized fields are located on the Miscellaneous page. The design of these fields allows for customization, and allows you to adapt the information you store and display to suit your business requirements.

Use the
Miscellaneous
page on the Add
Person window
to specify
customized
information for a
new member

▶ **To specify customized information**

Before you begin:

✓ Complete "Step 2: Specify Identifying and Demographic Information"

1 On the Add Person window, select the **Miscellaneous** tab. The Miscellaneous page appears.

2 On the Miscellaneous page, enter the member's customized information (for more information, see "About Customized Fields" in Chapter 3 of this guide).

Note: The fields on this page may have been customized by the System Administrator. The illustration on the following page provides an example of how these fields could be customized.

The fields on the Miscellaneous tab may be modified by the System Administrator

3 Continue to "Step 4: Specify Address Information."

Maintenance Tips — Customized Information

Once you have saved customized information in a new member profile, you can modify the customized information as needed.

To change customized information for an existing member*:* see "Modifying Customized Information" later in this chapter.

Step 4: Specify Address Information

When you add a new member to the e*Index database, you can specify information about the various addresses associated with a member, such as their home and business addresses.

Use the Addresses page on the Add Person window to specify address information for a new member

▶ **To specify address information**

Before you begin:

✓ Complete "Step 3: Specify Customized Information"

1 On the Add Person window, select the **Addresses** tab. The Addresses page appears.

Add

Add button

2 On the Addresses page, click **Add**. An empty row appears in the upper portion of the Addresses page, and detail fields appear in the lower portion of the Addresses page.

3   In the lower portion of the Addresses page, fill in the address fields (for more information, see "About Address Fields" in Chapter 3 of this guide).

4   Repeat steps 2 and 3 for each address you need to add to the member profile.

Delete
Delete button

5   If you add an address in error, highlight that address row in the upper portion of the Addresses page, and then click **Delete**. The address is removed from the list.

6   Continue to " 5: Specify Telephone Information."

Maintenance Tips — Address Information

Once you have saved an address in a new member profile, you can add, edit, or delete the address as necessary.

To add an address to a member profile: see "Adding Addresses to a Member Profile" later in this chapter.

To modify a member's address: see "Modifying Address Information" later in this chapter.

To delete a member's address: see "Deleting Addresses from a Member Profile" later in this chapter.

Step 5: Specify Telephone Information

When you add a new member to the e*Index database, you can specify information about the various telephone numbers associated with a member, such as their home, cellular, and business telephone numbers.

Use the Phones page
on the Add Person
window to specify
telephone numbers
for the new member

Phone Type	Phone	Ext
BUSINESS	(989) 555-1278	642
HOME	(989) 555-7874	

▶ To specify telephone information

Before you begin:

✓   Complete "Step 4: Specify Address Information"

1   On the Add Person window, select the **Phones** tab. The Phones page appears.

Add button

2   On the Phones page, click **Add**. An empty row appears on the Phones page.

3   In the new row, fill in the telephone fields (for more information, see "About Telephone Fields" in Chapter 3 of this guide).

4   Repeat steps 2 and 3 for each telephone number you need to add to the member profile.

Delete button

5   If you add a telephone number in error, highlight the row containing the telephone number, and then click **Delete**. The telephone number is removed from the list.

6   Continue to "Step 6: Specify Non-unique IDs."
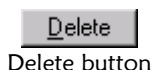
Maintenance Tips — Telephone Information

Once you have saved a telephone number in a new member profile, you can add, edit, or delete certain information about the telephone number.

To add a telephone number to a member profile: see "Adding Telephone Numbers to a Member Profile" later in this chapter.

To m   lephone number: see "Modifying Telephone Information" later in this chapter.

To delete a member's telephone number: see "Deleting Telephone Numbers from a Member Profile" later in this chapter.

Step 6: Specify Non-unique IDs

When you add a new member to the database, you can specify non-unique IDs for the member. To specify non-unique IDs, you need to display the Other IDs page.

Use the Other IDs page on the Add Person window to specify non-unique IDs for the new member

▶ To specify non-unique IDs

Before you begin:

✓ Complete "Step 5: Specify Telephone Information"

1 On the Add Person window, select the **Other IDs** tab. The Other IDs page appears.

Add

Add button

2 On the Other IDs page, click **Add**. An empty row appears.

3 In the new row, fill in information about the non-unique ID (for more information, see "About Other ID Fields" in Chapter 3 of this guide).

4 Repeat steps 2 and 3 for each non-unique ID you need to add to the member profile.

Delete

Delete button

5 If you add a non-unique ID in error, highlight the row containing that ID, and then click **Delete**. The non-unique ID is removed from the list.

6 Continue to "Step 7: Save the Member Profile."

Maintenance Tips — Non-unique ID Information

Once you have saved a non-unique ID in a new member profile, you can add, edit, or delete certain information.

To modify an existing non-unique ID: see "Modifying Non-unique ID Information" later in this chapter.

To add a new non-unique ID to a member profile: see "Adding a Non-unique ID to a Member Profile" later in this chapter.

To delete a non-unique ID from a member profile see "Deleting a Non-unique ID from a Member Profile" later in this chapter.

Step 7: Save the Member Profile

After you have specified all of the required information for a member profile, you can save the profile to the database. If you try to close the Add Person window without saving the profile, a dialog appears to warn you that the information you entered will not be saved.

Once you have entered member information on the Add Person window, you need to save the information

▶ **To save the member profile**

Before you begin:

  ✓ Complete "Step 6: Specify Non-unique IDs"

Save tool

1 Once you have entered all the available member information, click **Save** on the Add toolbar. The Add Confirmation dialog appears.

Add Confirmation Message

OK button

2 On the Add Confirmation dialog, click **OK**. A completion dialog appears.

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

This Add Complete dialog appears if the new profile has no potential duplicates

> **Note** ☒
> ❓ New UID# 100-000-0011 has been added to the database.
>
> [OK]
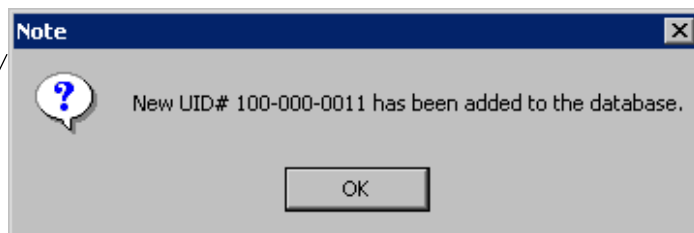
This Add Complete dialog appears if the new profile has potential duplicates

> **Note** ☒
> ❓ New UID# 100-000-0010 has been added and is a potential duplicate of 100-000-0000.
>
> [OK]
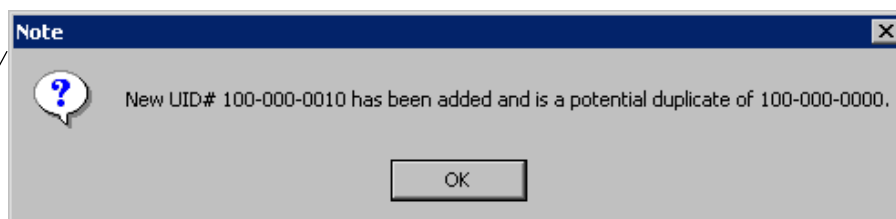
This Add Complete dialog appears if the new profile is identical to an existing profile with the exception of system and local ID

> **Note** ☒
> ❓ This system/local identifier record has been added to existing UID# 100-000-0000.
>
> [OK]
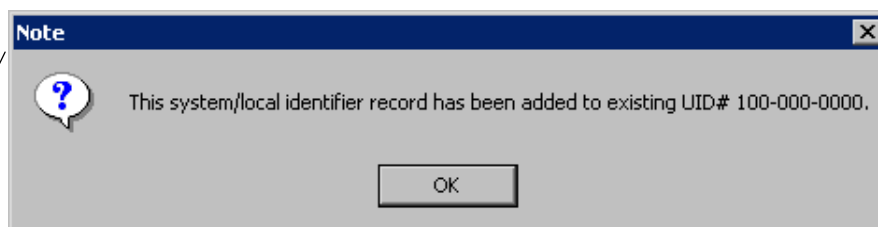
[OK]
OK button

3 On the Add Complete dialog, click **OK**. The new member profile is saved, and a comment is generated to the profile indicating the date and time the profile was created and the user who created it.

Maintenance Tips — Member Profiles

Once you have saved a member profile, you can add, edit, or delete certain information. You can also deactivate a member profile.

To modify an existing alias: see "Modifying a Member's Alias Information" later in this chapter.

To add an alias to a member profile: see "Adding an Alias to a Member Profile" later in this chapter.

To delete an alias from a member profile: see "Deleting an Alias from a Member Profile" later in this chapter.

To add local ID to a member profile: see "Adding a Local ID to a Member Profile" later in this chapter.

To deactivate a local ID in a member profile: see "Deactivating a Local ID in a Member Profile" later in this chapter.

To deactivate a member profile: see "Deactivating a Member Profile" later in this chapter.

Comparing Member Information

Overview

This section provides the step-by-step instructions you need in order to compare member information in e*Index. You can compare a member profile before and after a specific event occurred or you can compare two different member profiles. The procedures described in this section are:

■   Viewing an Audit Trail

■   Comparing Member Profiles

Viewing an Audit Trail

Using the Audit Trail function, you can view historical information for a specific member, and compare the member's profile before and after a specific event occurred to determine what information was modified as a result of the event.

View a history of member information on the Audit Trail window

▶ To view an audit trail

Before you begin:

✓   Obtain information about the member, such as their UID, a system in which they were registered, or a specific transaction performed against the member's profile

Audit Trail tool

1 On the Main toolbar, click **Audit Trail**. The Audit Trail Search window appears.

Specify your search criteria on the Audit Trail Search window

2 Enter the search criteria for the member you want to view (for more information, see "About Audit Trail Search Fields" following this procedure).

Search tool

3 On the Audit Trail Search toolbar, click **Search**. The Audit Trail Results window appears with a list of matching profiles (for more information, see "About Audit Trail Results Fields" following this procedure).

The results of your search appear on the Results page

4 On the Results page, double-click the member profile you want to view, or highlight the profile and then press **Enter**. The Audit Trail window appears with the Demographics page displayed.

For more information about the identification fields displayed in the upper portion of this window, see "About Audit Trail Fields" following this procedure).

For more information about the demographic fields displayed on the Demographics page in the lower portion of the window, see "About Demographics Fields" in Chapter 3 of this guide).

Notes:

■ *The image on the left side of the window reflects the member's information before the event occurred. The image on the right reflects the member's information after the event occurred.*

■ *Any differences between the two profiles are highlighted.*

■ *If the record you selected has no historical data, then the message **Person has no before image** appears in the lower portion on the left side of the window.*

5 Do any of the following:

To view additional identification information in the upper portion of the window, use the scrollbars to the right of each record.

View additional information about
the member by using the scrollbars
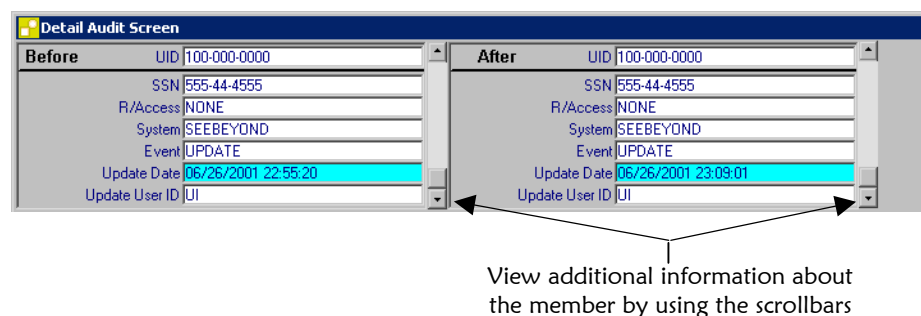
To compare customized audit information, click the **Miscellaneous** tab (for more information, see "About Customized Fields" in Chapter 3 of this guide).

To compare address audit information, click the **Addresses** tab (for more information, see "About Address Fields" in Chapter 3 of this guide).

To compare telephone audit information, click the **Phones** tab (for more information, see "About Telephone Fields" in Chapter 3 of this guide).

To compare alias audit information, click the **Aliases** tab (for more information, see "About Alias Fields" in Chapter 3 of this guide).

To compare local ID audit information, click the **Local IDs** tab (for more information, see "About Local ID Fields" in Chapter 3 of this guide).

To compare non-unique ID audit information, click the **Other IDs** tab (for more information, see "About Other ID Fields" in Chapter 3 of this guide).

Comment tool

To view comments associated with the member, click **Comment**. The Comment window appears.

Previous tool

To view the audit trail for the preceding profile in the results list on the Results page, click **Previous**.

Next tool

To view the audit trail for the following profile in the results list on the Results page, click **Next**.

Print Report tool

To print the displayed audit trail, click **Print Report**.

Close tool

6   When you have finished comparing the member information, click **Close**.

About Audit Trail Search Fields

The fields located on the Audit Trail Search window allow you to specify search criteria for the members you want to view. The System and Source fields allow you to narrow the search to only the records within a specific entity of the organization.

In this field …	type or select …
UID	The member's unique global identifier assigned by e*Index.
	No default
Event	The type of event that caused the member's profile to change.
	No default
Person Category	The type of member whose audit trail you want to view.
System	A computer system within your business enterprise in which members are registered and assigned local identifiers.
	No default

In this field …	type or select …
Source	A code that indicates where the information in the audit trail originated.

No default |
| **User ID** | The logon ID of the user who created or updated the member profiles for which you are searching.

No default |
| **Start Date/Time** | The beginning date and time for the search. The query is performed for transactions that fall between the **Start Date/Time** and the **End Date/Time**.

Default: No default for the date. The time field defaults to the time configured by the System Administrator |
| **End Date/Time** | The ending date and time for the search. The query is performed for transactions that fall between the **Start Date/Time** and the **End Date/Time**.

Default: No default for the date. The time field defaults to the time configured by the System Administrator |

About Audit Trail Results Fields

The fields located on the Audit Trail Results window help you to identify a specific member profile.

This field …	displays this information …
Transaction No	The sequential identification codes of the transaction (or event) that cause the audit trail record.
UID	The unique identification number of the member. This number is assigned by e*Index.
Last Name	The member's last name.
First Name	The member's first name.
Middle Name	The member's middle name or initial.
DOB	The member's date of birth.
Gender	The gender of the member.
Status	The member's status at the time of the audit trail record.
System	The name of the system in which the transaction occurred that created the audit trail record.

This field …	displays this information …
Event	The type of transaction that changed the member profile and caused the audit trail to be written. Transaction types include adds, merges, updates, and so on.
Update User ID	The logon ID of the user who performed the transaction.
Update Date	The date the transaction occurred.

About Audit Trail Fields

The fields located in the upper portion of the Audit Trail window help you to compare a member's identifying information before and after a specific transaction took place.

Note: Many fields on the Audit Trail window are configurable, and may be modified or hidden by the System Administrator. For information about fields on the window that differ from those listed below, see the System Administrator. The descriptions below describe only the default fields that are visible when e*Index is first installed.

This field …	displays this information …
UID	The unique identification number of the member. This number is assigned by e*Index.
Last Name	The last name of the displayed member.
First Name	The first name of the displayed member.
Middle Name	The middle name or initial of the displayed member.
DOB	The month, day, and year that the member was born.
Gender	The gender of the member.
Person Category	The type of member whose audit trail you are viewing, such as customer, employee, patient, and so on.
SSN	The member's social security number.
R/Access	An indicator that specifies whether the member's address and telephone information should be masked.
System	The name of the system in which the transaction occurred that created the displayed audit trail.
Event	The event code that indicates the type of transaction that caused the displayed audit trail to be written.
Update Date	The date that the member profile was last modified.
Update User ID	The logon ID of the user who performed the transaction that caused the displayed audit trail to be written.

Comparing Member Profiles

Using e*Index's Compare function, you can compare two member profiles to check for similarities and differences between the two profiles. e*Index automatically highlights any differences between the two profiles you are comparing.

Compare two member profiles side-by-side on the Comparison window

▶ To compare two member profiles

Before you begin:

✓ Obtain the UIDs for the members you want to compare
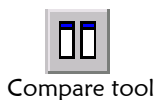
Compare tool

1 On the Main toolbar, click **Compare**. The Comparison window appears.

2 On the Comparison window, enter the UID of the first member in the UID field at the top left side of the window, and then press **Enter**. The fields on the left side of the window are populated with the appropriate member information.

3 Enter the UID of the second member in the UID field at the top right side of the window, and then press **Enter**. The fields on the right side of the window are populated with the appropriate member information, and any differences between the two members are highlighted.

*Note: If either UID is unknown, you can perform a search for the profiles by clicking the **Search** button to the right of the appropriate UID field. Perform a search as described in chapter 3 under "Searching for Member Profiles."*

4   Do any of the following:

For more information about the identification fields displayed in the upper portion of this window, see "About Comparison Fields" following this procedure).

For more information about the demographic fields displayed on the Demographics page in the lower portion of the window, see "About Demographics Fields" in Chapter 3 of this guide).

To compare customized information, click the **Miscellaneous** tab (for more information, see "About Customized Fields" in Chapter 3 of this guide).

To compare address information, click the **Addresses** tab (for more information, see "About Address Fields" in Chapter 3 of this guide).

To compare telephone information, click the **Phones** tab (for more information, see "About Telephone Fields" in Chapter 3 of this guide).

To compare alias information, click the **Aliases** tab (for more information, see "About Alias Fields" in Chapter 3 of this guide).

To compare local ID information, click the **Local IDs** tab (for more information, see "About Local ID Fields" in Chapter 3 of this guide).

To compare non-unique ID information, click the **Other IDs** tab (for more information, see "About Other ID Fields" in Chapter 3 of this guide).

Comment button

To view comments for either member, click **Comment**, and then select the radio button next to the member whose comments you want to view. The Comments window appears.

Merge button

To combine the two profiles, click **Merge**, and then follow steps 5 through 9 under "Merging Member Profiles" later in this chapter.

Important! *Before you click **Merge**, make sure that the profile on the right is the one you want to keep.*

Resolve button

To resolve the two profiles, click **Resolved**, and then click **OK** on the two dialogs that appear.

Note: You can only resolve profiles that are already flagged as potential duplicates.

Print button

To print a full comparison of the two *profiles*, click **Print Report**. The profiles print to a default printer.

Close button

5   When you have finished comparing the two profiles, click **Close**.

About Comparison Fields

The fields located in the upper portion of the Comparison window help you compare identifying information for two member profiles.

Note: Many fields on the Comparison window are configurable, and may have been modified or hidden by the System Administrator. For more information about fields on your window that differ from those listed below, see the System Administrator. The field descriptions below describe only the default fields that are visible when e*Index is first installed.

This field …	displays this information …
Update Date	The date and time the member profile was created or was last updated.
User ID	The user logon ID of the user who created or last updated the member profile.
UID	The unique identification number of the member. This number is assigned by e*Index.
Last Name	The last name of the displayed member.
First Name	The first name of the displayed member.
Middle Name	The middle name or initial of the displayed member.
DOB	The month, day, and year that the member was born.
Gender	The gender of the member.
Person Category	The type of member whose profiles you are comparing, such as customer, employee, patient, and so on.
SSN	The member's social security number.
R/Access	An indicator that specifies whether the member's address and telephone information should be masked.

Maintaining Member Information

Overview

This section provides step-by-step instructions for maintaining up-to-date and accurate member information in your database. Member maintenance includes these procedures:

■ Modifying Identification Information

■ Modifying Demographic Information

■ Modifying Customized Information

■ Adding, Modifying, and Deleting Addresses

■ Adding, Modifying, and Deleting Telephone Numbers

■ Adding, Modifying, and Deleting Aliases

■ Adding and Deactivating Local IDs

■ Adding, Modifying, and Deleting Non-unique IDs

■ Adding a User-Defined Comment to a Member Profile

■ Adding a Predefined Comment to a Member Profile

■ Deleting a Comment from a Member Profile

■ Deactivating a Member

■ Finding Potential Duplicates

■ Resolving Potential Duplicates

■ Merging Member Profiles

■ Unmerging Member Profiles

Note: When a member profile is modified through the GUI, a message is generated to the ui_msg_detail table. This message is then sent to e*Gate with the information that an event has occurred against that profile.

Modifying Identification Information

If information about a member changes, you need to update the member's information in e*Index. To modify a member's identification information about a member, you need to display the View/Edit Person window in Edit mode.

Modify identification information about a member in the upper portion of the View/Edit Person window

▶ To modify a member's identification information

Before you begin:

✓ Display the member profile you want to modify on the View/Edit Person window

Edit tool

1 On the View/Edit toolbar, click **Edit**. The window changes to Edit mode.

2 Modify any open field in the upper portion of the window (for more information, see "About Identification Fields" in Chapter 3 of this guide).

Save tool

3 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.
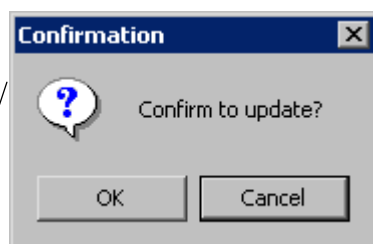
Update Confirmation dialog

OK

OK button

4 On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update
Complete
dialog

Note

? UID# 100-000-0000 has been updated.

OK

OK

OK button
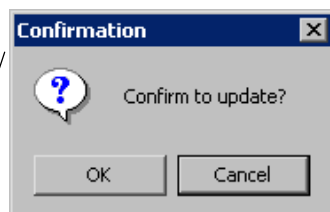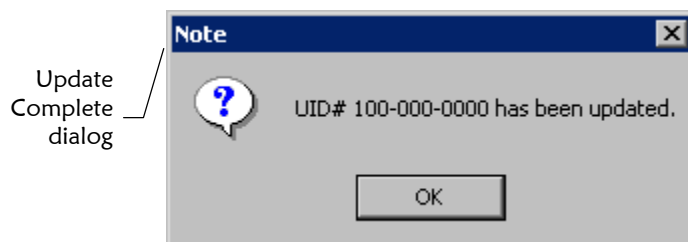
5 On the Update Complete dialog, click **OK**. The changes are saved to the database.

Modifying Demographic Information

If a member's demographic information changes, you need to update the member's information on the Demographic page of the View/Edit Person window.
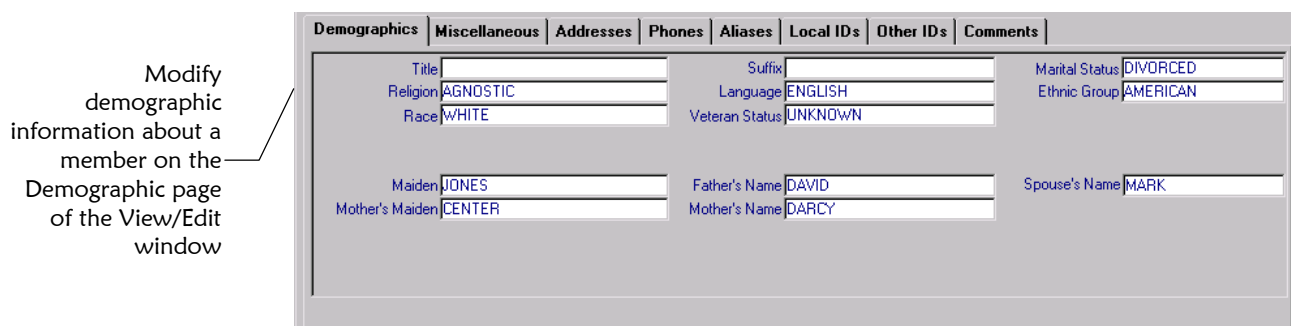
Modify
demographic
information about a
member on the
Demographic page
of the View/Edit
window

| Demographics | Miscellaneous | Addresses | Phones | Aliases | Local IDs | Other IDs | Comments |

Title | Suffix | Marital Status DIVORCED
Religion AGNOSTIC | Language ENGLISH | Ethnic Group AMERICAN
Race WHITE | Veteran Status UNKNOWN |

Maiden JONES | Father's Name DAVID | Spouse's Name MARK
Mother's Maiden CENTER | Mother's Name DARCY |

▶ To modify a member's demographic information

Before you begin:

✓ Display the member profile you want to modify on the View/Edit Person window

Edit tool

1 On the View/Edit toolbar, click **Edit**. The window changes to Edit mode.

2 Modify any open field in Demographic page in the lower portion of the window (for more information, see "About Demographic Fields" in Chapter 3 of this guide).

Save tool

3 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update
Confirmation
dialog

OK

OK button

4 On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update
Complete
dialog

OK

OK button
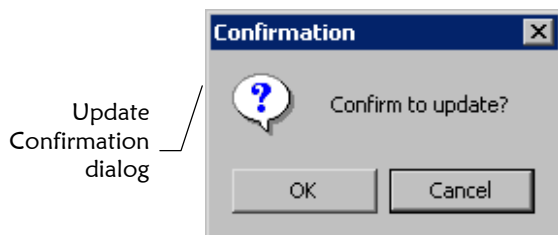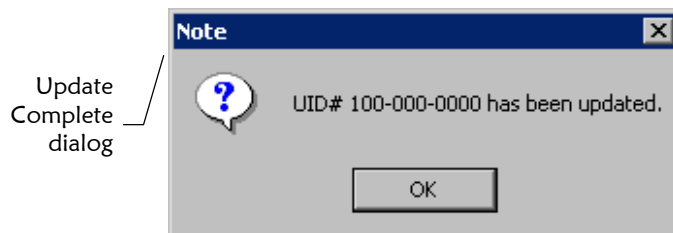
5 On the Update Complete dialog, click **OK**. The changes are saved to the database.

Modifying Customized Information

If the information that has been customized for your organization changes for a member, you need to update the member's profile. To modify a member's customized information, you need to display the Miscellaneous page of the View/Edit Person window.
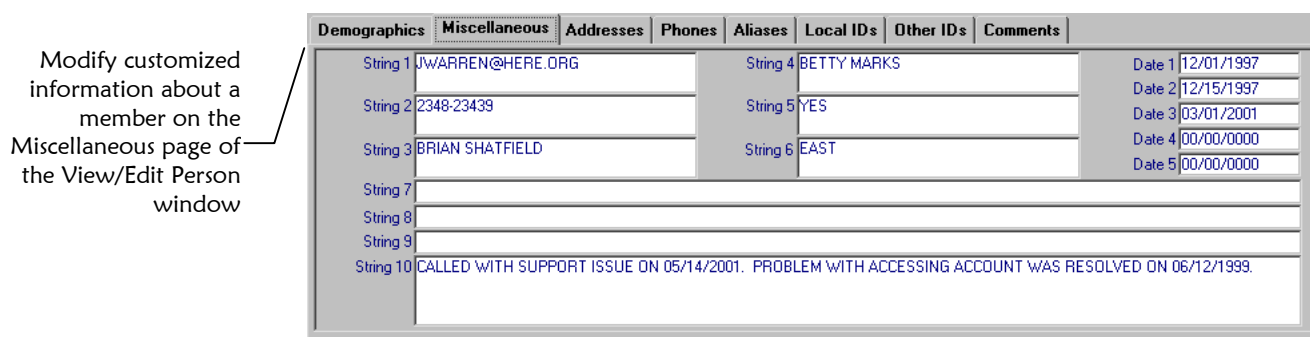
Modify customized
information about a
member on the
Miscellaneous page of
the View/Edit Person
window

▶ **To modify a member's customized information**

Before you begin:

✓ Display the member profile you want to modify on the View/Edit Person window

Edit tool

1 On the View/Edit toolbar, click **Edit**. The window changes to Edit mode.

**2** In the middle of the View/Edit Person window, select the **Miscellaneous** tab. The Miscellaneous page appears.

3 Modify any open field in Miscellaneous page in the lower portion of the window (for more information, see "About Customized Fields" in Chapter 3 of this guide).

Note: Your System Administrator may have customized the fields on this window. The following example illustrates how these fields can be customized.

The fields on the Miscellaneous tab may have been customized for your organization

Save tool

4 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

OK button

5 On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update Complete dialog

OK button

6 On the Update Complete dialog, click **OK**. The changes are saved to the database.

Adding Addresses to a Member Profile

If a member submits additional address information, you may need to add a new address record. You can only add one address of each address type. To add an address to a member profile, display the Addresses page of the View/Edit Person window.

Add new addresses to a member profile on the Addresses page of the View/Edit Person window

▶ To add an address to a member profile

Before you begin:

✓ Display the member profile you want to modify on the View/Edit Person window

1 On the View/Edit Person toolbar, click **Edit**. The window changes to Edit mode.

Edit tool

2 In the middle of the View/Edit Person window, select the **Addresses** tab. The Addresses page appears.

Add button

3 On the Addresses page, select **Add**. A new row appears in the addresses list, and the fields are cleared in the lower portion of the page.

4 In the lower portion of the Addresses page, fill in the address fields (for more information, see "About Address Fields" in Chapter 3 of this guide).

5 Repeat steps 3 and 4 for each address you need to add to the member profile.

Delete button

6 If you add an address in error, highlight that address row in the upper portion of the Addresses page, and then click **Delete**. The address is removed from the list.

Save tool

7 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update
Confirmation
dialog

8 On the Update Confirmation dialog, click **OK**. The Update Complete
dialog appears.

OK button

Update
Complete
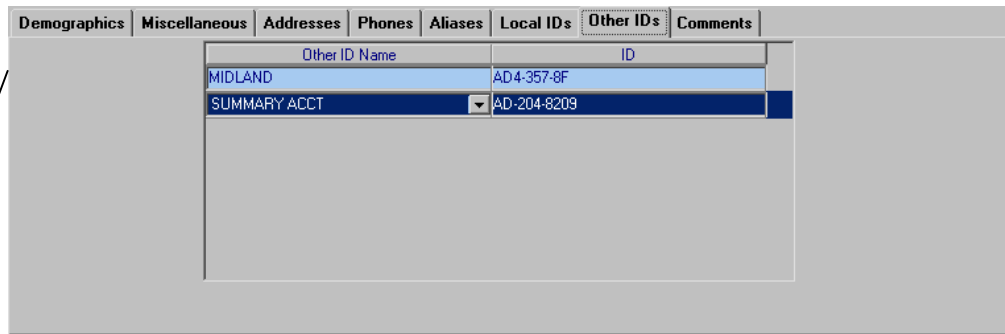dialog

9 On the Update Complete dialog, click **OK**. The changes are saved to
the database.

OK button
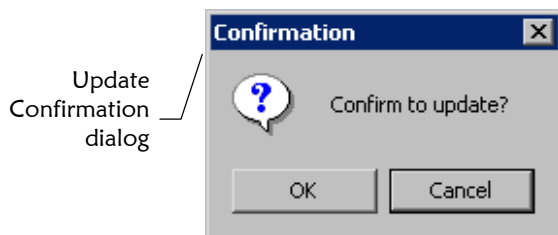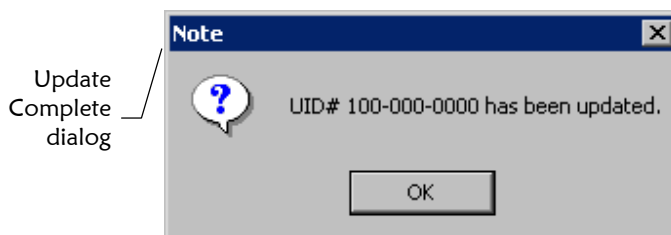
Modifying Address Information

If a member moves or changes their business location, you may need to
update their address information. To modify an address, you need to display
the Addresses page of the View/Edit Person window.

Modify addresses in
a member profile
on the Addresses
page of the
View/Edit Person
window
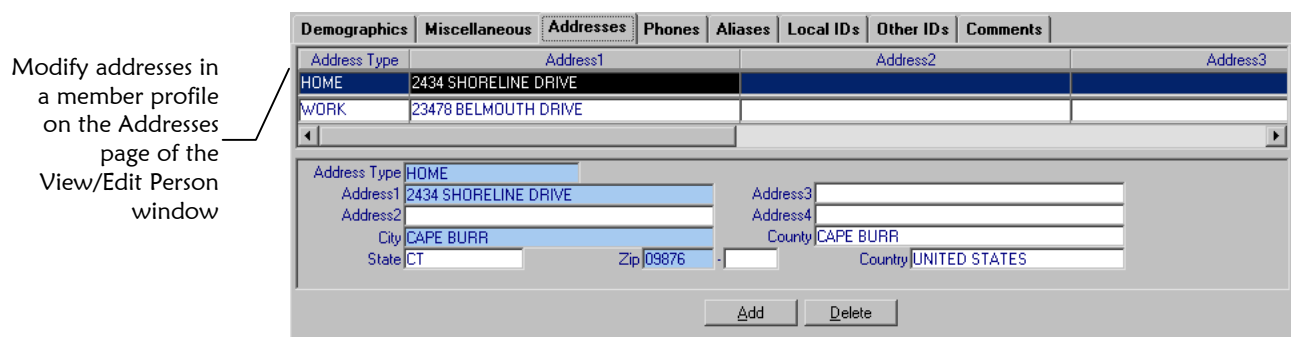
▶ **To modify an address in a member profile**

Before you begin:

✓ Display the member profile you want to modify on the View/Edit
Person window

Edit tool

1 On the View/Edit Person toolbar, click **Edit**. The window changes to
Edit mode.

2   In the middle of the View/Edit Person window, select the **Addresses** tab. The Addresses page appears.

3   In the upper portion of the Addresses page, highlight the row containing the address you want to modify.

4   In the lower portion of the Addresses page, modify any open fields (for more information, see "About Address Fields" in Chapter 3 of this guide).

5   Repeat steps 3 and 4 for each address you need to modify in the member profile.

Save tool

6   On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

OK button
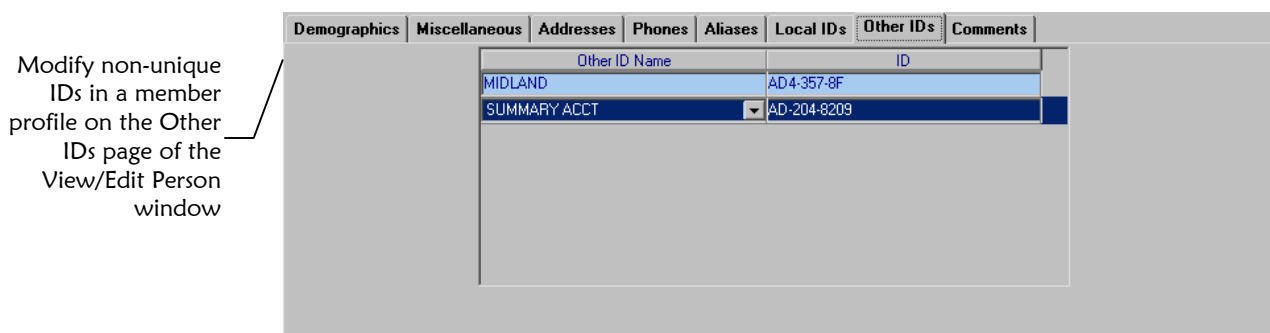
7   On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update Complete dialog

OK button
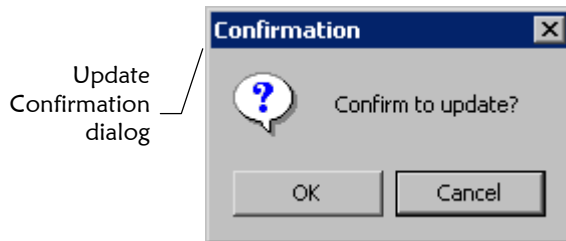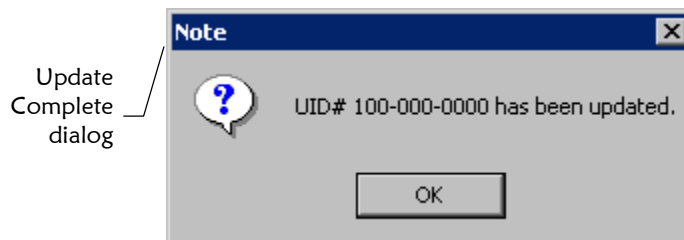
8   On the Update Complete dialog, click **OK**. The changes are saved to the database.

Deleting Addresses from a Member Profile

If an address for a member is entered incorrectly, or the member no longer uses an existing address, you can delete the obsolete addresses. To delete an address, you need to display the Addresses page of the View/Edit Person window.

Delete obsolete addresses from a member profile on the Addresses page of the View/Edit Person window

▶ **To delete an address from a member profile**

Before you begin:

✓ Display the member profile you want to modify on the View/Edit Person window

Edit tool

1 On the View/Edit Person toolbar, click **Edit**. The window changes to Edit mode.

2 In the middle of the View/Edit Person window, select the **Addresses** tab. The Addresses page appears.

3 In the upper portion of the Addresses page, highlight the row containing the obsolete address.

Delete button

4 On the Addresses page, click **Delete**. The address is removed from the list.

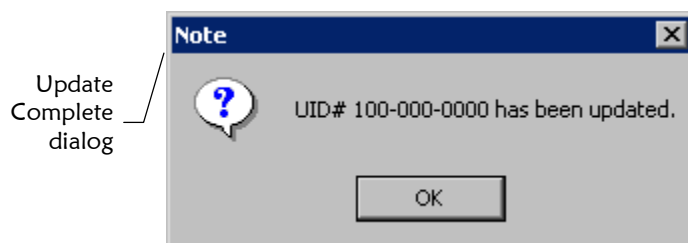**5** Repeat steps 3 and 4 for each address you need to delete from the member profile.

Save tool

6 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update
Confirmation
dialog

Confirmation ☒

? Confirm to update?

OK   Cancel

OK

OK button

7 On the Update Confirmation dialog, click **OK**. The Update Complete
dialog appears.

Update
Complete
dialog

Note ☒

? UID# 100-000-0000 has been updated.

OK

OK

OK button
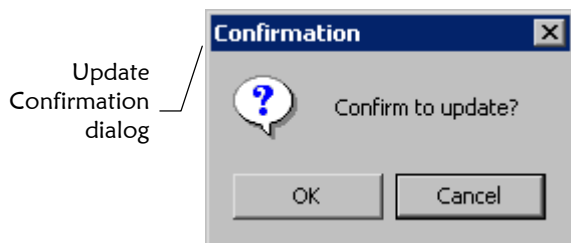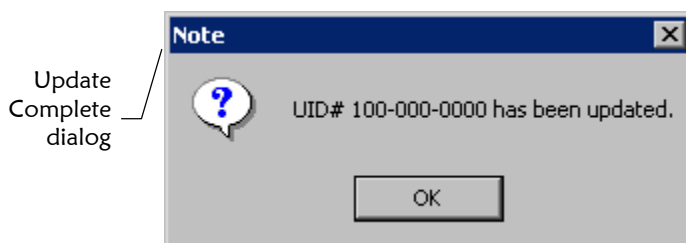
8 On the Update Complete dialog, click **OK**. The changes are saved to
the database.

Adding Telephone Numbers to a Member Profile

If a member submits additional telephone information, you may need to add
a new telephone number record. You can only add one telephone number
for each phone type. To add a telephone number, use the Phones page of the
View/Edit Person window.

Add new telephone
numbers to a
member profile on
the Phones page of
the View/Edit
Person window

Demographics	Miscellaneous	Addresses	Phones	Aliases	Local IDs	Other IDs	Comments

Phone Type	Phone	Ext
BUSINESS	(989) 555-1278	642
HOME	(989) 555-7874	

▶ **To add a telephone number to a member profile**

Before you begin:

✓ Display the member profile you want to modify on the View/Edit
Person window

Edit tool

1 On the View/Edit Person toolbar, click **Edit**. The window changes to Edit mode.

2 In the middle of the View/Edit Person window, select the **Phones** tab. The Phones page appears.

Add button

3 On the Phones page, select **Add**. A new row appears in the telephone list.

4 In the new row, fill in the telephone fields (for more information, see "About Telephone Fields" in Chapter 3 of this guide).

5 Repeat steps 3 and 4 for each telephone number you need to add to the member profile.

Delete button

6 If you add a telephone number in error, highlight that row, and then click **Delete**. The telephone number is removed from the list.

Save tool

7 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

Confirmation ☒

❓ Confirm to update?

OK   Cancel

OK button

8 On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update Complete dialog

Note ☒

❓ UID# 100-000-0000 has been updated.

OK

OK button
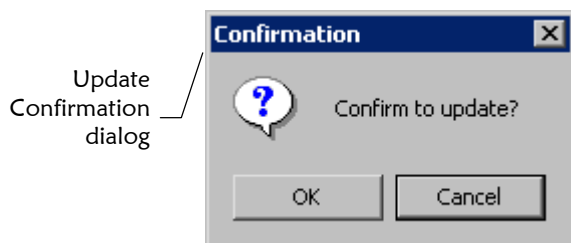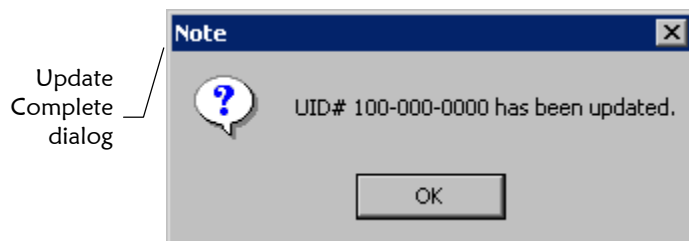
9 On the Update Complete dialog, click **OK**. The changes are saved to the database.

Modifying Telephone Information

If a member changes telephone numbers, you can update their telephone numbers. To modify a telephone number, use the Phones page of the View/Edit Person window.

Modify telephone
numbers for a
member profile on
the Phones page of
the View/Edit
Person window

| Demographics | Miscellaneous | Addresses | Phones | Aliases | Local IDs | Other IDs | Comments |

Phone Type	Phone	Ext
BUSINESS	(989) 555-1278	642
HOME	(989) 555-7874	

▶ To modify telephone number in a member profile

Before you begin:

✓   Display the member profile you want to modify on the View/Edit Person window

Edit tool

1   On the View/Edit Person toolbar, click **Edit**. The window changes to Edit mode.

2   In the middle of the View/Edit Person window, select the **Phones** tab. The Phones page appears.

3   In the telephone list on the Phones page, modify any open fields (for more information, see "About Telephone Fields" in Chapter 3 of this guide).

Save tool

4   On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update
Confirmation
dialog

Confirmation

? Confirm to update?

OK   Cancel

OK button

5   On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update
Complete
dialog

> Note
>
> ? UID# 100-000-0000 has been updated.
>
> OK

OK
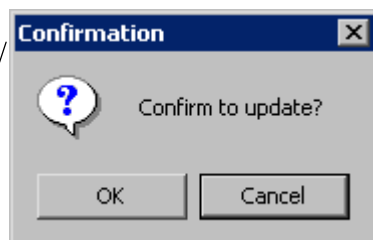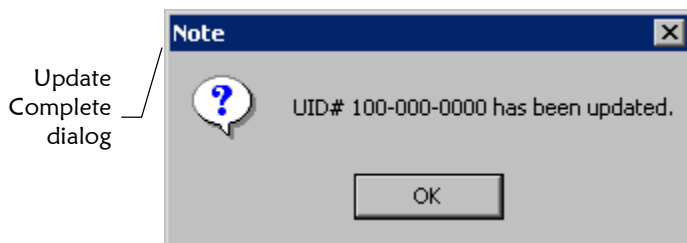
OK button

6 On the Update Complete dialog, click **OK**. The changes are saved to the database.

Deleting Telephone Numbers from a Member Profile

If a telephone number for a member is entered incorrectly, or the member no longer uses an existing number, you can delete the obsolete number from the member profile. To delete a telephone number, display the Phones page of the View/Edit Person window.

Delete obsolete
telephone numbers
from a member
profile on the
Phones page of the
View/Edit Person
window

| Demographics | Miscellaneous | Addresses | Phones | Aliases | Local IDs | Other IDs | Comments |

Phone Type	Phone	Ext
BUSINESS	(989) 555-1278	642
HOME	(989) 555-7874	

▶ **To delete a telephone number from a member profile**

Before you begin:

✓ Display the member profile you want to modify on the View/Edit Person window

EDIT

Edit tool

1 On the View/Edit Person toolbar, click **Edit**. The window changes to Edit mode.

2 In the middle of the View/Edit Person window, select the **Phones** tab. The Phones page appears.

3 In the upper portion of the Phones page, highlight the row containing the obsolete telephone number.

Delete

Delete button

4 On the Phones page, click **Delete**. The telephone number is removed from the list.

5 Repeat steps 3 and 4 for each telephone number you need to delete from the member profile.

Save tool

6 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update
Confirmation
dialog

> **Confirmation** ☒
>
> **?** Confirm to update?
>
> OK   Cancel

OK button

7 On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update
Complete
dialog

> **Note** ☒
>
> **?** UID# 100-000-0000 has been updated.
>
> OK
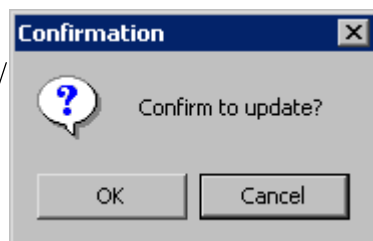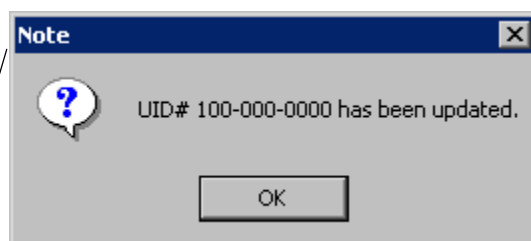
OK button

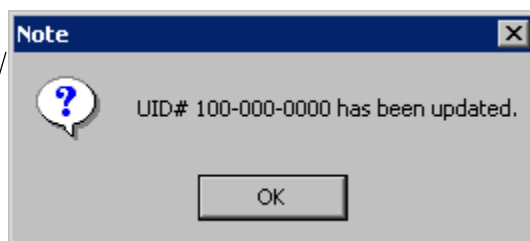**8** On the Update Complete dialog, click **OK**. The changes are saved to the database.

Adding an Alias to a Member Profile

If you find that a member is known by a name other than those recorded in e*Index, you can add the name as an alias to the member's profile. Your System Administrator can configure e*Index to perform searches against alias names as well as members' current names.

Use the Aliases page
on the View/Edit
Person window to
add new aliases to a
member profile

> Demographics | Miscellaneous | Addresses | Phones | Aliases | Local IDs | Other IDs | Comments
>
> | Last Name | First Name | Middle Name |
> | --- | --- | --- |
> | JOHNSON | ELIZABETH | JUNE |
> | JOHNSON | LIZ | |
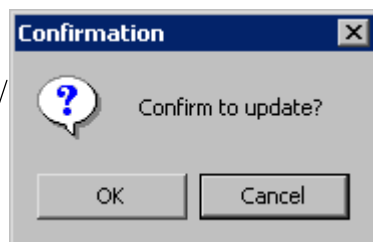> | WARREN | LIZ | |

▶ **To add an alias to a member profile**

Before you begin:

 ✓ Display the member profile you want to modify on the View/Edit Person window

1 On the View/Edit Person window, click the **Aliases** tab. The Aliases page appears.

Edit tool

2 On the View/Edit Person toolbar, click **Edit**. The window changes to Edit mode.

Add button

3 On the Aliases page, click **Add**. A blank row appears at the bottom of the alias list.

4 In the blank fields in the new row, enter the member's new alias information (for more information, see "About Alias Fields" in Chapter 3 of this guide).

Save tool

5 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

Confirmation

Confirm to update?

OK   Cancel

OK button

6 On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update Complete dialog

Note

UID# 100-000-0000 has been updated.

OK
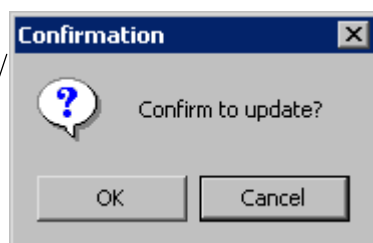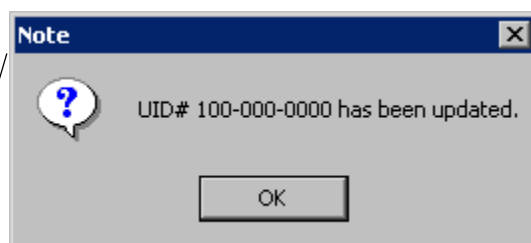
OK button

7 On the Update Complete dialog, click **OK**. The changes are saved to the database.

Modifying a Member's Alias Information

If an alias name was entered in error for a member profile, you can modify the alias name as needed. To modify an alias name, you need to display the Alias page on the View/Edit Person window.

Use the Aliases page on the View/Edit Person window to modify aliases in a member profile

Last Name	First Name	Middle Name
JOHNSON	ELIZABETH	JUNE
JOHNSON	LIZ	
WARREN	LIZ	

▶ **To modify a member's alias information**

Before you begin:

✓ Display the member profile you want to modify on the View/Edit Person window

1 On the View/Edit Person window, select the **Aliases** tab. The Aliases page appears.

Edit tool

2 On the View/Edit Person toolbar, click **Edit**. The window changes to Edit mode.

3 On the Alias page, modify any open field in the alias list (for more information, see "About Alias Fields" in Chapter 3 of this guide).

Save tool

4 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

Confirmation

Confirm to update?

OK   Cancel

OK button

5 On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update
Complete
dialog

> Note ☒
>
> ❓ UID# 100-000-0000 has been updated.
>
> [OK]

OK
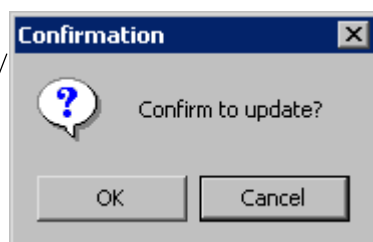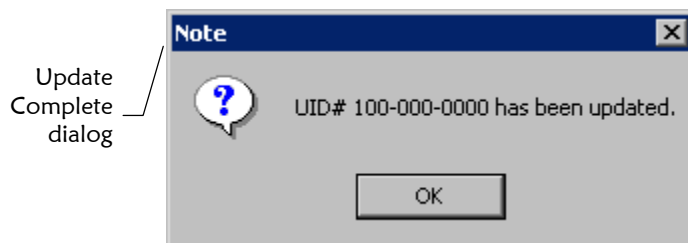
OK button

6 On the Update Complete dialog, click **OK**. The changes are saved to the database.

Deleting an Alias from a Member Profile

If an existing alias name for a member is no longer valid or was entered in error, you can delete the alias to remove it from the member profile. To delete an alias name, you need to display the Alias page of the View/Edit Person window.

Use the Aliases page
on the View/Edit
Person window to
delete aliases from a
member profile
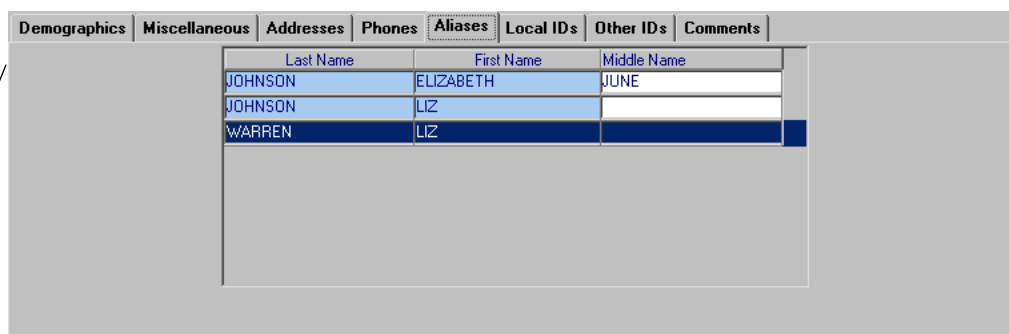
| Demographics | Miscellaneous | Addresses | Phones | Aliases | Local IDs | Other IDs | Comments |

Last Name	First Name	Middle Name
JOHNSON	ELIZABETH	JUNE
JOHNSON	LIZ	
WARREN	LIZ	

▶ **To delete an alias from a member profile**

Before you begin:

✓ Display the member profile you want to modify on the View/Edit Person window

1 On the View/Edit Person window, click the **Aliases** tab. The Aliases page appears.

EDIT

Edit tool

2 On the View/Edit Person toolbar, click **Edit**. The window changes to Edit mode.

Delete

Delete button

3 On the Aliases page, highlight the alias name you want to delete, and then click **Delete**. The selected alias name is removed from the list.

Save tool

4 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update
Confirmation
dialog

OK button

5 On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update
Complete
dialog

OK button
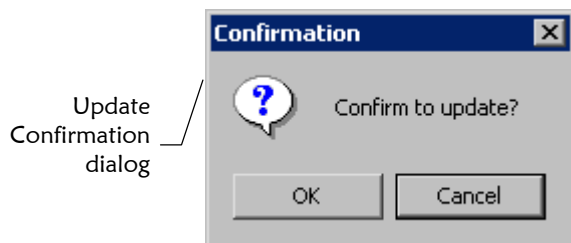
6 On the Update Complete dialog, click **OK**. The changes are saved to the database.

Adding a Local ID to a Member Profile

If you find a member has local IDs in addition to those already recorded in e*Index, you can add the local IDs to the member's profile. To add a local ID to a member profile, you need to specify information such as the system that assigned the local ID and the identification code.
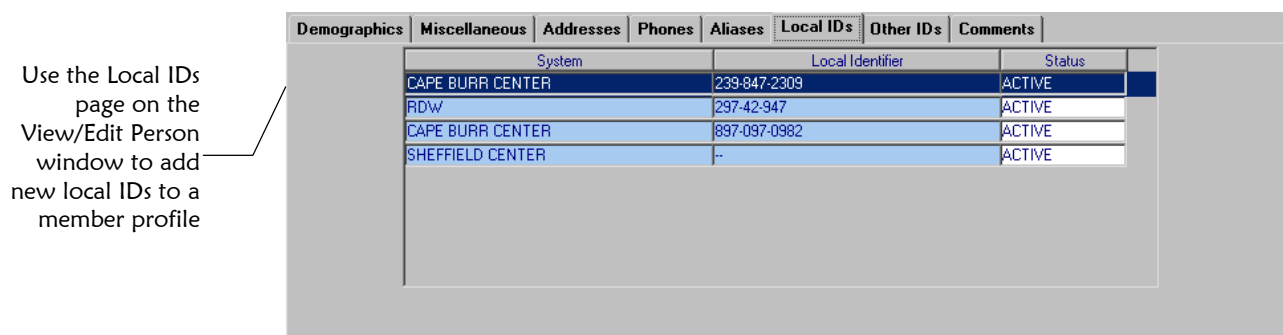
Use the Local IDs
page on the
View/Edit Person
window to add
new local IDs to a
member profile

▶ To add a local ID to a member profile

Before you begin:

✓ Display the member profile you want to modify on the View/Edit Person window

1 On the View/Edit Person window, click the **Local IDs** tab. The Local IDs page appears.

Edit tool

2 On the View/Edit Person toolbar, click **Edit**. The window changes to Edit mode.

Add button

3 On the Local ID page, click **Add**. A blank row appears at the bottom of the local ID list.

4 In the new row, enter information about the local ID (for more information, see "About Local ID Fields" in Chapter 3 of this guide).

Delete button

5 If you add a local ID in error, highlight the row containing the local ID, and then click **Delete**. The row is deleted.

Note: Once you have saved a local ID record, you cannot delete the record.

Save tool

6 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

Confirmation

? Confirm to update?

OK   Cancel

OK button

7 On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update Complete dialog

Note

? UID# 100-000-0000 has been updated.

OK
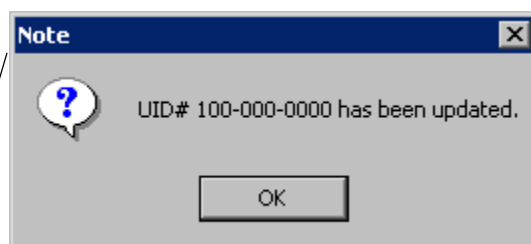
OK button

8 On the Update Complete dialog, click **OK**. The changes are saved to the database.

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

Deactivating a Local ID in a Member Profile

If an existing local ID for a member becomes obsolete, you can deactivate the ID for the member profile. A member profile must contain at least one active local ID; you cannot deactivate a member's last remaining active local ID.

You can deactivate a member's local ID on the Local IDs page of the View/Edit Person window

System	Local Identifier	Status
Demographics	Miscellaneous	Addresses	Phones	Aliases	**Local IDs**	Other IDs	Comments
CAPE BURR CENTER	239-847-2309	ACTIVE
RDW	297-42-947	ACTIVE
CAPE BURR CENTER	897-097-0982	ACTIVE
SHEFFIELD CENTER	--	ACTIVE

▶ To deactivate a local ID in a member profile

Before you begin:

✓ Display the member profile you want to modify on the View/Edit Person window

1 On the View/Edit Person window, click the **Local IDs** tab. The Local IDs page appears.

Edit tool

2 On the View/Edit Person toolbar, click **Edit**. The window changes to Edit mode.

3 On the Local ID page, click in the status column of the row containing the local ID you want to deactivate, and then select **Deactivate** from the drop-down list.

Save tool

4 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

Confirmation

? Confirm to update?

OK   Cancel

OK button

5 On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update
Complete
dialog

Note

? UID# 100-000-0000 has been updated.

OK

OK
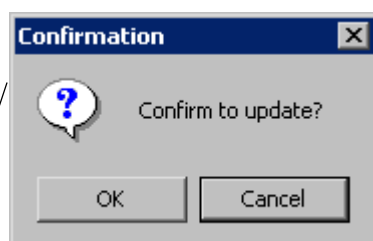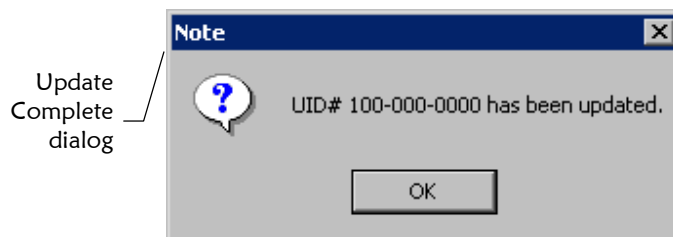
OK button

6 On the Update Complete dialog, click **OK**. The changes are saved to the database.

Reactivating a Local ID

You can easily reactivate a local ID record that has been deactivated if the record was deactivated in error or is no longer inactive.

You can reactivate a
member's local ID
on the Local IDs
page of the
View/Edit Person
window

| Demographics | Miscellaneous | Addresses | Phones | Aliases | Local IDs | Other IDs | Comments |

System	Local Identifier	Status
CAPE BURR CENTER	239-847-2309	ACTIVE
RDW	297-42-947	ACTIVE
CAPE BURR CENTER	897-097-0982	ACTIVE
SHEFFIELD CENTER	--	ACTIVE

▶ **To reactivate a local ID**

Before you begin:

✓ Display the member profile you want to modify on the View/Edit Person window

1 On the View/Edit Person window, click the **Local IDs** tab. The Local IDs page appears.

Edit tool

2 On the View/Edit Person toolbar, click **Edit**. The window changes to Edit mode.

3 On the Local ID page, click in the status column of the row containing the local ID you want to reactivate, and then select **Active** from the drop-down list.

Save tool

4 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update
Confirmation
dialog

> **Confirmation** ☒
>
> ❓ Confirm to update?
>
> [OK] [Cancel]

OK

OK button

5 On the Update Confirmation dialog, click **OK**. The Update Complete
dialog appears.

Update
Complete
dialog

> **Note** ☒
>
> ❓ UID# 100-000-0000 has been updated.
>
> [OK]

OK

OK button
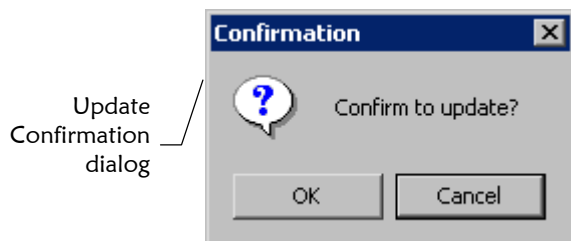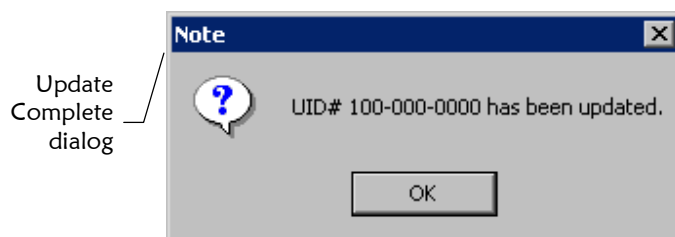
6 On the Update Complete dialog, click **OK**. The changes are saved to
the database.

Assigning Merge Status to a Local ID

After two records have been merged, you may need to change the status of
local ID records in the new record to "Merged". If the two merged records
each have a local ID from the same facility, you'll need to review the final
record and determine which local ID record should receive a status of
"Merged". A local ID can only be given a status of merged if the member
profile contains at least one other local ID in the same system.

You can change a
local ID status to
Merged on the Local
IDs page of the
View/Edit Person
window

Demographics	Miscellaneous	Addresses	Phones	Aliases	**Local IDs**	Other IDs	Comments

System	Local Identifier	Status
CAPE BURR CENTER	239-847-2309	ACTIVE
RDW	297-42-947	ACTIVE
CAPE BURR CENTER	897-097-0982	ACTIVE
SHEFFIELD CENTER	--	ACTIVE

▶ **To assign merge status to a local ID**

Before you begin:

✓ Display the member profile you want to modify on the View/Edit
Person window

1 On the View/Edit Person window, click the **Local IDs** tab. The Local IDs page appears.

Edit tool

2 On the View/Edit Person toolbar, click **Edit**. The window changes to Edit mode.

3 On the Local ID page, click in the status column of the row containing the local ID you want to mark as merged, and then select **Merged** from the drop-down list.

Save tool

4 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

Confirmation ☒

? Confirm to update?

[OK]   [Cancel]

OK button

5 On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update Complete dialog

Note ☒

? UID# 100-000-0000 has been updated.

[OK]
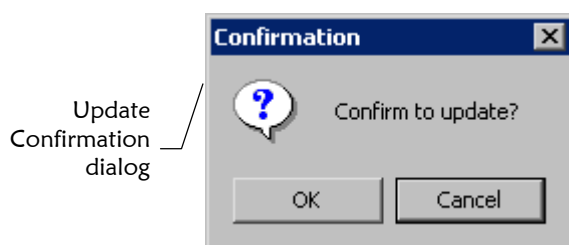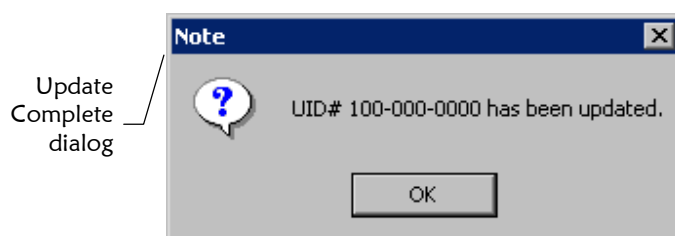
OK button

6 On the Update Complete dialog, click **OK**. The changes are saved to the database.

Adding a Non-unique ID to a Member Profile

Once you have saved a member profile, you can add new non-unique IDs to that profile as needed. You can add multiple non-unique IDs of the same type to a member profile. To add non-unique IDs to a profile, you need to display the Other IDs page on the View/Edit Person window.

Add non-unique IDs
to a member profile
on the Other IDs
page of the
View/Edit Person
window

| Demographics | Miscellaneous | Addresses | Phones | Aliases | Local IDs | Other IDs | Comments |

Other ID Name	ID
MIDLAND	AD4-357-8F
SUMMARY ACCT	AD-204-8209

▶ To add a non-unique ID to a member profile

Before you begin:

✓ Display the member profile you want to modify on the View/Edit
Person window

1 On the View/Edit Person window, click the **Other IDs** tab. The
Other IDs page appears.

Edit tool

2 On the View/Edit Person toolbar, click **Edit**. The window changes to
Edit mode.

Add button

3 On the Other ID page, click **Add**. A blank row appears at the bottom
of the non-unique ID list.

4 In the new row, enter information about the new ID (for more
information, see "About Other ID Fields" in Chapter 3 of this guide).

Delete button

5 If you add a non-unique ID in error, highlight the row containing the
non-unique ID, and then click **Delete**. The row is deleted.

Save tool

6 On the View/Edit Person window, click **Save**. The Update
Confirmation dialog appears.

Update
Confirmation
dialog

Confirmation

? Confirm to update?

OK   Cancel

OK button

7 On the Update Confirmation dialog, click **OK**. The Update Complete
dialog appears.
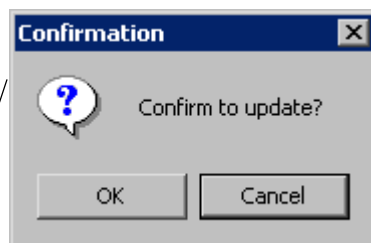
Update
Complete
dialog

OK button

8   On the Update Complete dialog, click **OK**. The changes are saved to the database.

Modifying Non-unique ID Information

Once you have saved a member profile, you can modify non-unique ID information within that profile. To modify a non-unique ID, you need to display the Other IDs page on the View/Edit Person window.

Modify non-unique
IDs in a member
profile on the Other
IDs page of the
View/Edit Person
window

Other ID Name	ID
MIDLAND	AD4-357-8F
SUMMARY ACCT	AD-204-8209

▶ **To modify a non-unique ID in a member profile**

Before you begin:

✓   Display the member profile you want to modify on the View/Edit Person window

1   On the View/Edit Person window, click the **Other IDs** tab. The Other IDs page appears.

Edit tool

2   On the View/Edit Person toolbar, click **Edit**. The window changes to Edit mode.

3   Modify information in any open field in the ID list (for more information, see "About Other ID Fields" in Chapter 3 of this guide).

Save tool

4   On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update
Confirmation
dialog

5 On the Update Confirmation dialog, click **OK**. The Update Complete
dialog appears.

OK button

Update
Complete
dialog

6 On the Update Complete dialog, click **OK**. The changes are saved to
the database.

OK button
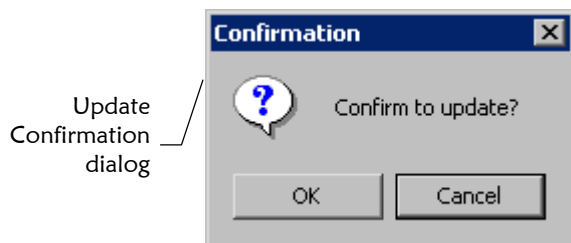
Deleting a Non-unique ID from a Member Profile

Once you have saved a member profile with non-unique IDs, you can delete
obsolete non-unique IDs from that profile. To delete a non-unique ID, you
need to display the Other IDs page on the View/Edit Person window.

Delete non-unique
IDs from a member
profile on the Other
IDs page of the
View/Edit Person
window
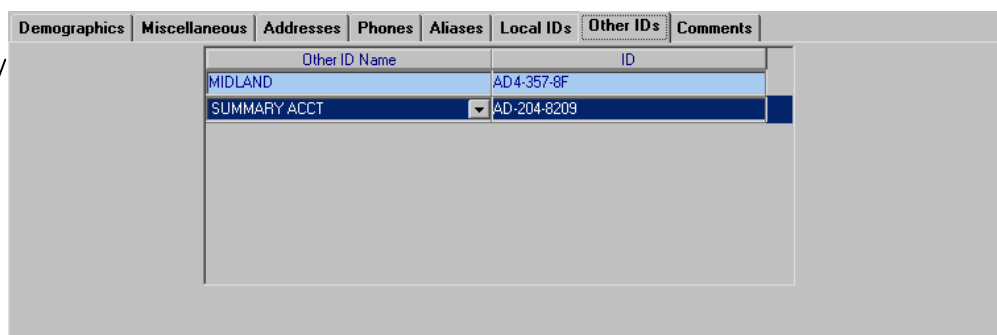
▶ **To delete a non-unique ID in a member profile**

Before you begin:

✓ Display the member profile you want to modify on the View/Edit
Person window

1 On the View/Edit Person window, click the **Other IDs** tab. The
Other IDs page appears.

Edit tool

2 On the View/Edit Person toolbar, click **Edit**. The window changes to Edit mode.

Delete button

3 Highlight the row containing the non-unique ID you want to remove, and then click **Delete**.

Save tool

4 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

Confirmation ☒

? Confirm to update?

OK   Cancel

OK button

5 On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update Complete dialog

Note ☒

? UID# 100-000-0000 has been updated.

OK
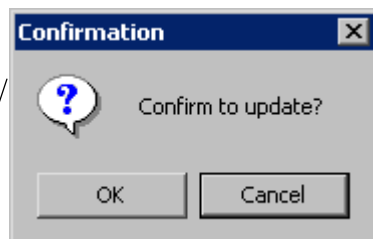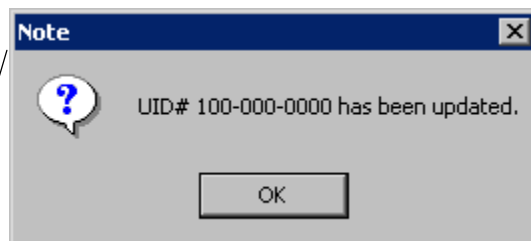
OK button

6 On the Update Complete dialog, click **OK**. The changes are saved to the database.

Adding a User-Defined Comment to a Member Profile

If you need to record additional information about a member, you can add a user-defined comment to the member's profile. Comments can include any information that you feel is relevant for the member profile, such as a reason for deactivating a profile, notes about possible duplicate profiles, and so on. You can only add one comment to a member profile at a time.

| Summary | Demographics | Miscellaneous | Addresses | Phones | Aliases | Local IDs | Other IDs | Comments |

Type	Date/Time	Comment
SYS	06/26/2001 15:11:30	UI Record 100-000-0000 was added by UI staff with user id UI
SYS	06/26/2001 19:03:51	UID 1000000006 has been merged with UID 1000000000
SYS	06/26/2001 19:10:10	UID 1000000006 has been unmerged from UID 1000000000
SYS	06/26/2001 19:13:46	UI record 1000000009 and 1000000000 have been reviewed and it has been determined that 1000000009 and 1000000000 are not the same person

Use the Comments page of the View/Edit Person window to add comments to a member profile

▶ To add a user-defined comment to a member profile

Before you begin:

✓ Display the member profile you want to update on the View/Edit Person window

1 On the View/Edit Person window, select the **Comments** tab. The comments page appears with a list of existing comments for the member.

User Defined Msg

User Defined Msg button
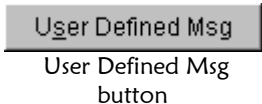
2 On the Comments window, click **User Defined Msg**. The User Defined Message dialog appears.

Enter your comment on the User Defined Message window

User Defined Message

Member was added manually on 06/21/01.
Registration system was down.

OK   Cancel

OK

OK button
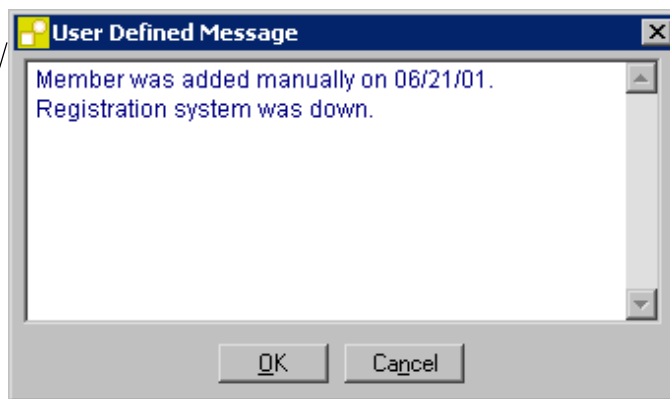
3 On the User Defined Message dialog, type your comment, and then click **OK**. The Comments window reappears with the new comment displayed at the bottom of the comments list.

Save tool

4 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update
Confirmation
dialog

5 On the Update Confirmation dialog, click **OK**. The Update Complete
dialog appears.
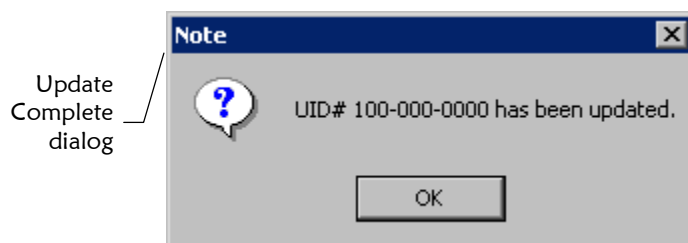
OK button

Update
Complete
dialog

6 On the Update Complete dialog, click **OK**. The changes are saved to
the database.

OK button

Adding a Predefined Comment to a Member Profile

If you need to record transaction information about a member, you can add a
predefined comment to the member's profile. If you don't see the predefined
comment you need in the drop-down list of options, your System
Administrator can add the comment to the list. You can only add one
comment to a member profile at a time.

Use the Comments
page on the
View/Edit Person
window to add
comments to a
member profile

▶ **To add a predefined comment to a member profile**

Before you begin:

✓ Display the member profile you want to update on the View/Edit
Person window

1   On the View/Edit Person window, select the **Comments** tab. The Comments window appears with a list of existing comments.

Pre-Defined Msg
button

2   On the Comments window, click **Pre-Defined Msg**. The Pre-defined Message dialog appears.
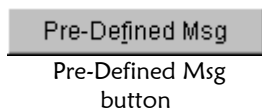
Select a comment
from the
Pre-defined
Message window

OK button
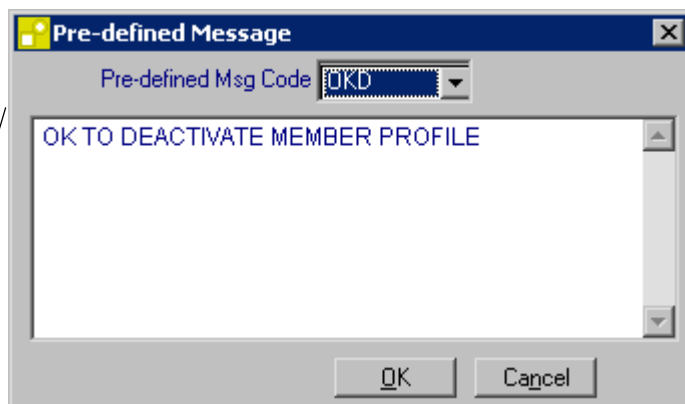
3   On the Pre-defined Message dialog, select a code from the Pre-defined Msg Code drop-down list, and then click **OK**. The Comments window reappears with the new comment displayed at the bottom of the comments list.

Note: When you select a code from the drop-down list, a description of the code you select appears in the middle of the Pre-defined Message dialog.

Save tool

4   On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update
Confirmation
dialog

OK button

5   On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update
Complete
dialog

OK button
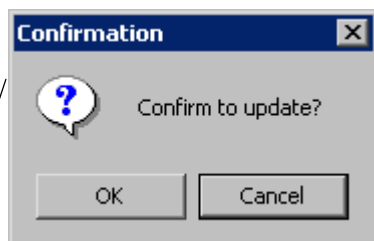
6 On the Update Complete dialog, click OK. The changes are saved to the database.

Deleting a Comment from a Member Profile

Once you have associated a comment with a member profile, you can delete the comment from the profile if it is no longer useful or accurate. Once a comment is deleted from a user profile, the deletion cannot be undone.

Use the Comments page on the View/ Edit Person window to delete comments from a member profile

▶ **To delete a comment from a member profile**

Before you begin:

✓ Display the member profile you want to update on the View/Edit Person window

1 On the View/Edit Person window, select the **Comments** tab. The Comments window appears with a list of existing comments.

Delete button

2 On the Comments window, highlight the comment to be deleted, and then click **Delete**. The selected comment is removed from the list.

Save tool

3 On the View/Edit Person window, click **Save**. The Update Confirmation dialog appears.

Update Confirmation dialog

OK button

4 On the Update Confirmation dialog, click **OK**. The Update Complete dialog appears.

Update
Complete
dialog

OK
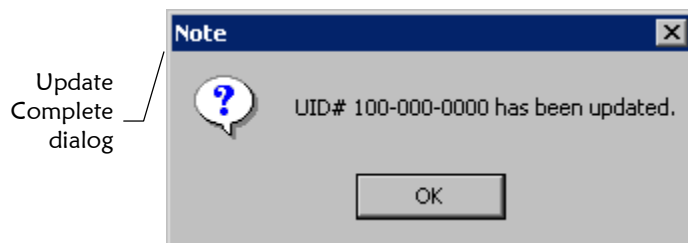
OK button

5 On the Update Complete dialog, click **OK**. The changes are saved to the database.

Deactivating a Member Profile

If a member is no longer active, you cannot delete the member profile, but you can deactivate that member profile. Deactivated profiles cannot be modified, and in some cases, cannot be viewed.

Use the View/Edit
Person window to
deactivate a
member who is no
longer active

▶ **To deactivate a member profile**

Before you begin:

✓ Display the member profile you want to update on the View/Edit Person window

---

Important! *Make sure the profile you have displayed is the profile you want to deactivate. This action cannot be undone.*

Deactivate tool

1 On the View/Edit Person window toolbar, click **Deactivate**. The Deactivate Confirmation dialog appears.

Deactivate
Confirmation
dialog

Yes button
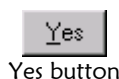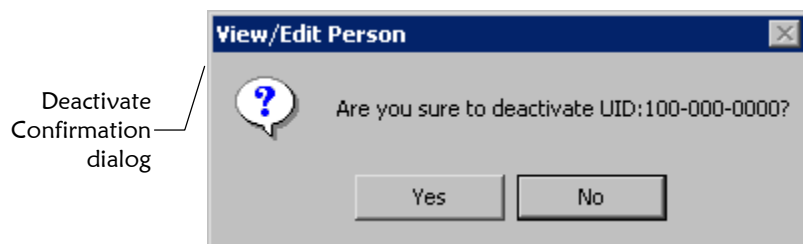
2   On the Deactivate Confirmation dialog, click **Yes**. The Deactivate
Complete dialog appears.

Deactivate
Complete
dialog
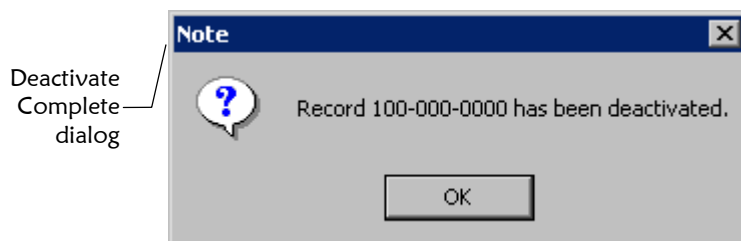
3   On the Deactivate Complete dialog, click **OK**. The profile is
deactivated in the database.

Notes:

◼ *When you deactivate a member profile, a message is generated to the
ui_msg_detail table to be sent to e*Gate with the information that an update
event has occurred.*

◼ *If this profile is returned from a future member search, it will be displayed in
fuchsia lettering in the resulting records list. Also, the member status changes
from **Active** to **Deactivate** on the View/Edit Person window.*

The member's status
changes to
Deactivated

Finding Potential Duplicates

You can easily find and compare potential duplicate profiles in e*Index.
Potential duplicate profiles are located based on the algorithm weight that
indicates how closely two profiles match. Once you compare the profiles,
you may need to merge the profiles or resolve them.

Use the Potential Duplicate Comparison window to compare two member profiles that have been flagged as possible duplicates

▶ To find potential duplicates

Before you begin:

✓ Obtain information about the member you want to check for potential duplicates, such as a system in which they are registered or the logon ID of the user who created the member profile

Potential Duplicate tool

1 On the application window, click **Potential Duplicate**. The Potential Duplicate Search window appears.

Enter your search criteria for duplicates on the Potential Duplicate Search window

2 On the Potential Duplicate Search window, enter your search criteria (for more information, see "About Potential Duplicate Search Fields" following this procedure).

Search tool

3 On the Potential Duplicate Search toolbar, click **Search**. The Results page appears (for more information, see "About Potential Duplicate Results Fields" following this procedure).

Select a pair of potential duplicate profiles from the Results list

4 In the Results lists, double-click the set of potential duplicate profiles you want to compare.

5 Do one of the following:

If the profiles you selected have additional potential duplicates, then the Associated Records window appears. Continue to step 6.

The Associated Records window displays additional related potential duplicates

If the profiles do not have additional duplicates, then the Comparison
window appears with the two profiles displayed side-by-side.
Continue to step 7.

6 On the Associated Records window, double-click the pair of profiles
you want to compare. The Potential Duplicate Comparison window
appears. The profiles are displayed side-by-side, and differences
between the two are highlighted.

7 View the information displayed for each profile.

*To view additional identification information in the upper portion of the
window*, use the scrollbars to the right of each record (for more
information, see "About Comparison Fields" earlier in this
chapter).

To compare customized information, click the **Miscellaneous** tab (for
more information, see "About Customized Fields" in Chapter 3 of
this guide).

To compare address information, click the **Addresses** tab (for more
information, see "About Address Fields" in Chapter 3 of this
guide).

To compare telephone information, click the **Phones** tab (for more
information, see "About Telephone Fields" in Chapter 3 of this
guide).

To compare alias information, click the **Aliases** tab (for more
information, see "About Alias Fields" in Chapter 3 of this guide).

To compare local ID information, click the **Local IDs** tab (for more
information, see "About Local ID Fields" in Chapter 3 of this
guide).

To compare non-unique ID information, click the **Other IDs** tab (for more
information, see "About Other ID Fields" in Chapter 3 of this
guide).

Print tool

8 Do any of the following:

To print the displayed potential duplicate report, click **Print Report**.

*To resolve the potential duplicate flag for the displayed profiles without
merging them*, follow the steps under "Resolving Potential
Duplicates" later in this chapter.

To combine the displayed profiles,

▶▶

Directional Arrow
button

- Make sure the directional arrows between the two UID numbers are pointing toward the profile you want to keep. To change the direction of the arrows, click the **Directional Arrow** button once.

- Follow steps 5 through 9 under "Merging Member Profiles" later in this chapter.
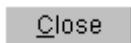
Close

Close button

9 When you are finished working with the potential duplicate profiles, click **Close**. The Potential Duplicate Comparison window closes and the Results page from your previous search reappears.

About Potential Duplicate Search Fields

The fields located on the Potential Duplicate Search window allow you to specify information about the potential duplicate profiles you want to view.

In this field …	type or select …
System	The system with which the member profile that caused the potential duplicate flag is associated (such as a registration system).
	No default
Source	A code that indicates where the information that caused the potential duplicate flag originated.
	No default
User ID	The logon ID of the user who created or updated the member profiles for which you are searching.
	No default
Start Date/Time	The beginning date and time for the search. The query is performed for transactions that fall between the **Start Date/Time** and the **End Date/Time**.
	Default: No default for the date. The time field defaults to the time configured by your System Administrator
End Date/Time	The ending date and time for the search. The query is performed for transactions that fall between the **Start Date/Time** and the **End Date/Time**.
	Default: No default for the date. The time field defaults to the time configured by your System Administrator

About Potential Duplicate Results Fields

The fields located on the Potential Duplicate Results window help you to identify a potential duplicate pair to display on the Potential Duplicate Comparison window.

This field …	displays this information …
Duplicate UID	The unique global identification number of the member profile whose addition to the database created the potential duplicate flag.
Existing UID	The unique global identification number of the member who was flagged as a potential duplicate with the profile identified by the **Duplicate UID**.
Reason	The reason that the profiles were flagged as potential duplicates.
Weight	The matching probability weight between the two profiles listed for each row.
System	The system with which the member profile identified by the **Duplicate UID** is associated.
Source	A code that indicates where the information originated for the profile identified by the **Duplicate UID**.
User ID	The logon ID of the user who added or updated the profile that created the potential duplicate pair.
Date	The date and time that the transaction that caused the potential duplicate flag occurred.

Resolving Potential Duplicates

When you compare two potential duplicate profiles and determine that they do not represent the same member, you need to resolve the two profiles to remove the potential duplicate flag. Once two potential duplicate profiles are resolved, they are removed from the Potential Duplicate Report.

Use the Potential Duplicate Comparison window to resolve two potential duplicate profiles that do not represent the same member
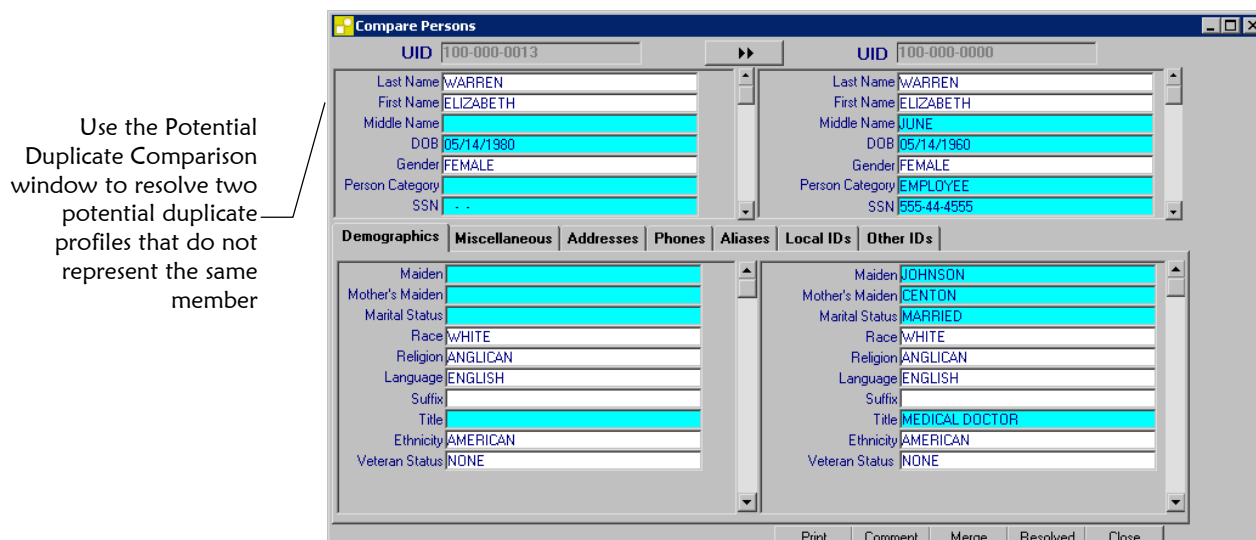
▶ To resolve two potential duplicate profiles

Before you begin:

✓ Display the two member profiles that you want to mark as resolved on the Potential Duplicate Comparison window (for more information, see "Finding Potential Duplicates" later in this chapter).

Resolved tool

1   On the Potential Duplicate Comparison window, click **Resolved**. The Resolve Confirmation dialog appears.

Resolve Confirmation dialog

OK button
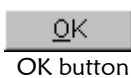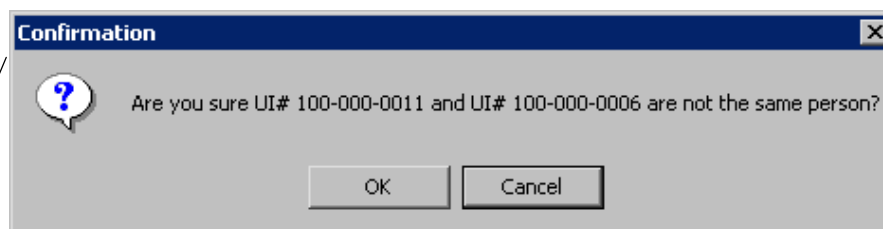
2   On the confirmation dialog, click **OK**. The Resolve Complete dialog appears.

Resolve Complete dialog

OK

OK button
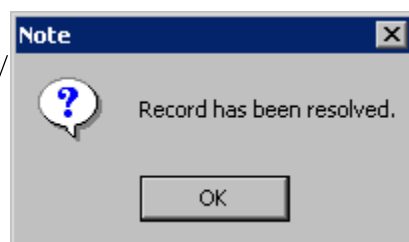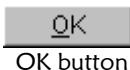
3 On the Resolve Complete dialog, click **OK**. The potential duplicate flag is removed, and the profiles are no longer regarded as possible duplicates of one another.

Note: When you resolve two potential duplicate profiles, a comment is generated to each of the member profiles to indicate that the profiles were once flagged as duplicates, but the flag has been removed.

Merging Member Profiles

When you determine that two member profiles represent the same member, you need to merge the profiles to form one profile that contains the member's most current information. The resulting profile is known as the Merge Result Record.

Use the Merge window to merge two member profiles that represent the same member

▶ To merge two member profiles

Before you begin:

✓ Obtain the UIDs of the member profiles you want to merge

Merge tool

1 On the application window, click **Merge**. The Merge window appears.

2 In the UID field on the left side of the window, enter the UID of the 'merge from' member profile, and then press **Enter**. The fields on the left side of the window are populated with the corresponding member's information.

3   In the UID field on the right side of the window, enter the UID of the 'merge to' member profile, and then press **Enter**. The fields on the right side of the window are populated.

4   To view any comments for either of the displayed profiles, click **Comment**, and then select the member whose comments you want to view from the dialog that appears.

Comment tool

Select the member whose comments you want to view
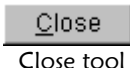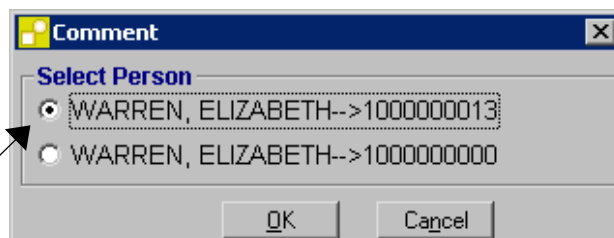
*When you are finished viewing comments, click **Close**. The Merge window reappears.*

Close tool

5   Do any of the following:

To merge the profiles without retaining any information in the 'merge from' profile, continue to step 7.

To retain some identification information in the 'merge from' profile, double-click the fields in the upper portion of the window that you want to keep in the new profile. A small arrow pointing to the right appears next to the fields you choose.

Arrowheads indicate which identification fields in the 'merge from' profile will be retained
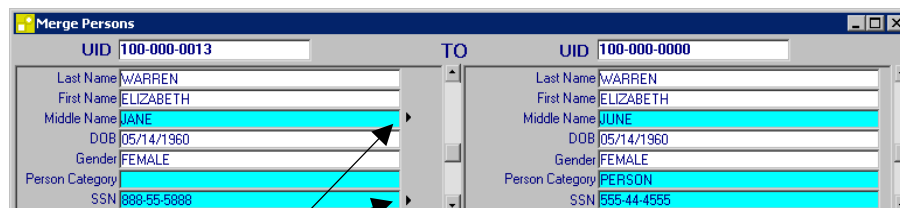
To retain any demographic information in the 'merge from' profile, double-click the fields you want to keep on the Demographic page in the 'merge from' profile. A small arrow pointing to the right appears next to the fields you chose.

Arrowheads indicate which demographic fields in the 'merge from' profile will be retained
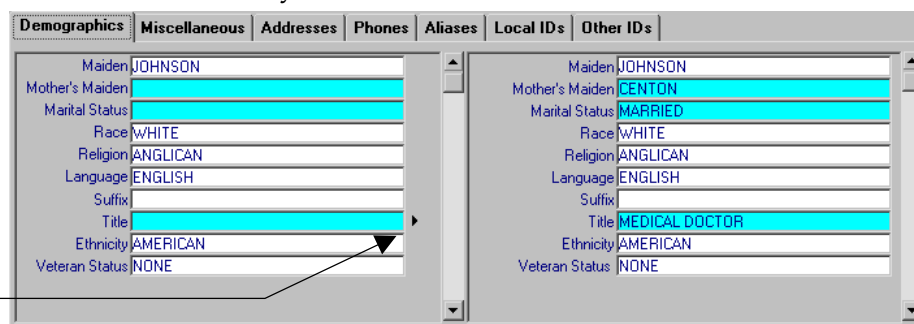
To retain customized information in the 'merge from' profile, select the
Miscellaneous tab and then double-click the fields you want to
keep.

Arrowheads indicate
which demographic fields
in the 'merge from'
profile will be retained

To retain any address information in the 'merge from' profile, select the
Addresses tab and then make sure the checkboxes next to the
addresses you want to keep are selected. By default, all of the
addresses in the 'merge to' record are selected and all of the
addresses in the 'merge from' record are deselected.

In this example, one
address record from
each profile will be
kept

*Note: In a field level merge, address information can only be selected in
blocks. Portions of an address cannot be selected, and all information
associated with the selected address is kept.*

To retain any telephone numbers in the 'merge from' profile, select the
Phones tab and then make sure the checkboxes next to the
telephone numbers you want to keep are selected. By default, all
of the numbers in the 'merge to' record are selected and all of the
numbers in the 'merge from' record are deselected.

In this example, only
the telephone numbers
associated with the
'merge to' profile will
be retained

To retain any aliases in the 'merge from' profile, select the **Aliases** tab and then make sure the checkboxes next to the alias names you want to keep are selected. By default, all of the aliases in the 'merge to' record are selected and all of the aliases in the 'merge from' record are deselected.

In this example, one alias name from each profile will be retained

Ck	Last Name	First Name	Midc	Ck	Last Name	First Name	Midc
☑	RUSTY	WITCHER		☑	MARKUS	WITCHER	
☐	MARC	WITCHER					

Demographics | Miscellaneous | Addresses | Phones | Aliases | Local IDs | Other IDs

To view the local IDs that will be kept, select the Local tab. All local IDs associated with both profiles will be retained in the new profile. Local IDs cannot be deselected for a merge.

Use the Local page to view all local IDs that will be associated with the resulting record after the merge

Demographics | Miscellaneous | Addresses | Phones | Aliases | Local IDs | Other IDs

Ck	System		Ck	System	
☑	RDW	294-7247-29	☑	CAPE BURR CENTER	43-535353
☑	SHEFFIELD CENTER	284-702-7840	☑	RDW	564-8731-57
			☑	SHEFFIELD CENTER	345-835-8834
			☑	WAYFIELD	--

To retain any non-unique IDs in the 'merge from' profile, select the **Other IDs** tab and then make sure the checkboxes next to the IDs you want to keep are selected. By default, all of the non-unique IDs in the 'merge to' record are selected and all of the non-unique IDs in the 'merge from' record are deselected.

In this example, two IDs from the 'merge to' profile and one ID from the 'merge from' profile will be retained

Demographics | Miscellaneous | Addresses | Phones | Aliases | Local IDs | Other IDs

Ck	ID Name		Ck	ID Name	
☑	SUMMARY ACCT	42-742-0734	☑	MIDLAND	AD4-357-8F
☐	MIDLAND	284-729-07	☑	SUMMARY ACCT	AD-204-8209

Merge tool

6 Once you have selected the information in the 'merge from' profile that you want to keep, click **Merge** on the Merge toolbar. The Merge Confirmation dialog appears.

Merge Confirmation
dialog

> **Confirmation**   ☒
>
> **?** UI Record 100-000-0000 will be kept?
>
>   OK   Cancel
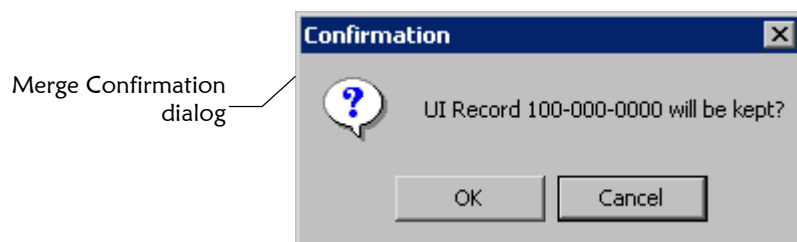
OK button

7 On the confirmation dialog, click **OK**. A second confirmation dialog appears.

Merge Confirmation
dialog

> **Merge Persons**   ☒
>
> **?** Are you sure to merge?
>
>   Yes   No
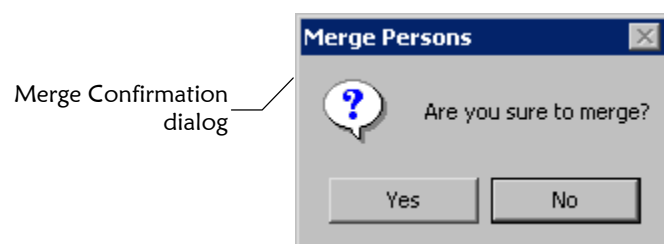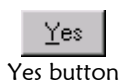
Yes button

8 On the Merge Result Record window, click **Yes**. The Merge Complete dialog appears.

Merge Complete
dialog

> **Note**   ☒
>
> **?** Merge is complete. UI record 100-000-0013 has been merged with UI record 100-000-0000.
>
>   OK
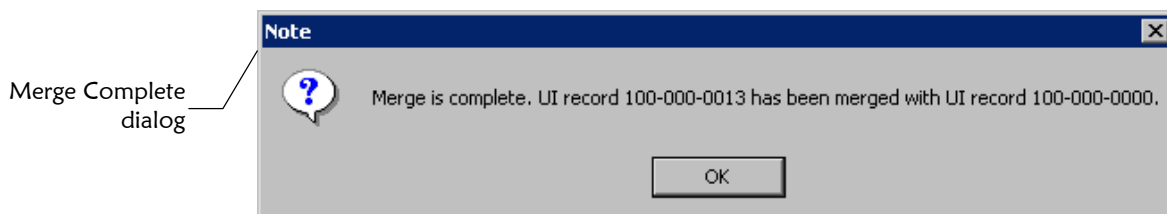
OK button

9 On the Merge Complete dialog, click **OK**. The new profile is saved and the Merge window closes.

10 After you merge two profiles, review the local IDs for the kept record to see if any of them need to be assigned a status of "Merged". By default, all merged local IDs will still have a status of "Active". For consistency, the status of the merged local IDs should be changed (for more information, see "Assigning Merge Status to a Local ID" earlier in this chapter.

Notes:

■ *When you merge two profiles, a comment containing the merge information is generated and added to both profiles.*

■ *When you merge two profiles, a message is also generated to the ui_msg_detail table to be sent to e*Gate with the information that a merge event has occurred between these two profiles.*

Unmerging Member Profiles

If two profiles are merged in error, the profiles can easily be separated using the Unmerge function of e*Index. Unmerging two profiles returns both profiles to their status prior to the merge. This means that if any updates were made to the merged record after the records were merged, those updates are lost.

Use the Unmerge window to separate two profiles that were merged in error

▶ To unmerge two merged member profiles

Before you begin:

✓ Obtain the UID number of the profile that is still active after the merge process

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Important! *When you unmerge two records, any updates that were made to the active merged record after the records were merged will be lost.*

---

1 On the Primary toolbar, click **Unmerge**. The UnMerge window appears with the Demographic page displayed.

Unmerge tool

2　In the UID field at the top of the window, type the UID number of the active profile you want to unmerge. The fields in both the Merged Record and the Original Record sections are populated.

Note: The Merged Record that appears on the left side of the window reflects the current state of the member profile after the merge. The Original Record on the right side of the window reflects the state of the member profile that was not kept during the merge.

Unmerge tool

3　Click **Unmerge** on the Unmerge toolbar. A warning dialog appears, reminding you that any updates made after the records were merged will be lost when you unmerge the records.

UnMerge Person

All updates after the Merge will be lost for 100-000-0000
Do you want to unmerge 100-000-0013?

Yes　　　No

Yes button
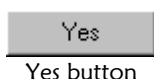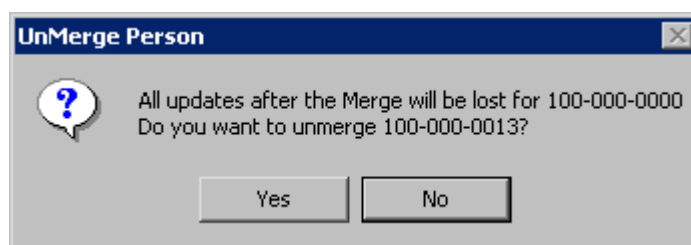
4　Click **Yes** to continue unmerging the profiles. The Unmerge Complete dialog appears.

Note

Unmerge Complete dialog

Unmerge is complete. UI Record 100-000-0013 has been unmerged.

OK

OK button
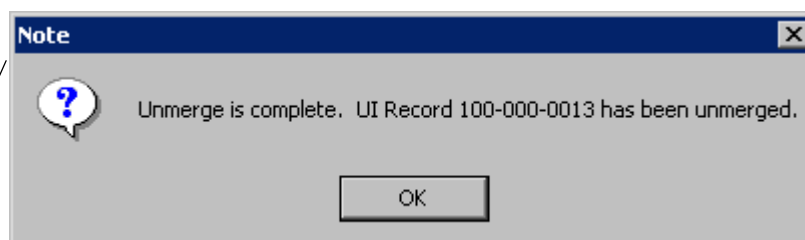
5　On the Unmerge Complete dialog, click **OK**. Each member profile is returned to its status prior to the merge, regardless of any updates that may have been performed after the merge.

Notes:

■　*When you unmerge two profiles, a comment containing the unmerge information is generated and added to both profiles.*

■　*When you unmerge two profiles, a message is also generated and sent to e*Gate with the information that an unmerge event has occurred between these two profiles.*

Glossary of Terms

Alias

An alternative name by which a member may be known, such as a nickname or maiden name.

Alphanumeric Search

A type of search that looks for profiles that precisely match your specified criteria. This type of search does not allow for misspellings or data entry errors.

Application window

All e*Index windows except for the first window that appears. Application windows are used for specific functions and purposes, such as merging member records or deactivating a member record.

Application window toolbar

The application window toolbar is located beneath the primary toolbar and is unique to each application window. This toolbar contains tools for various functions that you can perform from the active application window.

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, and so on.

Balloon help

A description of each toolbar button that appears when you hold the mouse pointer briefly over the button.

Batch processes

When updates are performed in batch processes, several updates from external systems are stored in a batch file. At a specified time, the updates stored in the batch file are made to the e*Index database.

Deactivate

When you deactivate a member profile, that profile is no longer active and cannot be modified or merged.

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.

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 the right side that, when clicked, display a drop-down list of options for that field.

Field

Any area on an e*Index 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.

Logon ID

The identification code that allows you to log on to e*Index applications. This code is assigned to you by your system administrator.

Main menu

The uppermost menu on the e*Index windows. You can access all of the primary functions of e*Index from this menu.

Master person index

A database that stores information on all of the members of a business enterprise, regardless of the computer system from which the member information originates.

Matching probability weight

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.

Member

Any person who participates within your business enterprise. A member could be a customer, employee, patient, and so on.

Member profile

A set of information that describes characteristics of an individual member. A profile includes demographic and identification information about a member.

Merge

To join two member profiles that represent the same person into one member profile. You can choose which information from each profile will be saved in the new member profile.

Merge history

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

Merged profile

A member profile that is no longer active because it has been merged into another member profile.

Microhelp

Descriptions of the fields on e*Index windows. A field description appears in the status bar when the cursor is in certain fields.

Non-unique ID

An identification code that may be assigned to several members in the database. For example, if a family uses a single account or insurance policy, they will each be assigned the same identification code for that account or policy.

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 the window that displays the 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 logon ID, allows you to log on to e*Index. Your system administrator assigns your password, and may specify that you change your password at certain intervals.

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.

Predefined comment

A comment that has been previously defined by the System Administrator. To associate a predefined comment with a member, you select a predefined comment from a drop down list of options.

Primary toolbar

The uppermost toolbar on the e*Index windows. This toolbar allows you to access all of the primary functions of e*Index by clicking on specific tools.

Quality Workstation

The computer workstation on which the e*Index GUI resides. The database is maintained and monitored from this workstation.

Real-time

When updates occur in real-time, the e*Index database is modified at the time the updates occur in your external systems.

System

A computer application within your company in which member information is entered, such as a registration system.

System-generated comment

A comment that is automatically generated to a member profile when specific transactions occur. A message is generated when a profile is added, merged, unmerged, deactivated, or resolved.

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 universal identification number assigned to each member entered in e*Index. This number is used to cross-reference member records, and to uniquely identify each member throughout your enterprise.

Unmerge

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

User-defined comment

A free-text comment that you can associate with a member profile to insert any information you choose about the member.

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