SUN SEEBEYOND

eVIEW™ STUDIO REPORTING GUIDE

Release 5.1.1

Sun microsystems

Copyright © 2006 Sun Microsystems, Inc., 4150 Network Circle, Santa Clara, California 95054, U.S.A. All rights reserved. Sun Microsystems, Inc. has intellectual property rights relating to technology embodied in the product that is described in this document. In particular, and without limitation, these intellectual property rights may include one or more of the U.S. patents listed at http://www.sun.com/patents and one or more additional patents or pending patent applications in the U.S. and in other countries. U.S. Government Rights - Commercial software. Government users are subject to the Sun Microsystems, Inc. standard license agreement and applicable provisions of the FAR and its supplements. Use is subject to license terms. This distribution may include materials developed by third parties. Sun, Sun Microsystems, the Sun logo, Java, Sun Java Composite Application Platform Suite, SeeBeyond, eGate, eInsight, eVision, eTL, eXchange, eView, eIndex, eBAM, eWay, and JMS are trademarks or registered trademarks of Sun Microsystems, Inc. in the U.S. and other countries. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. in the U.S. and other countries. Products bearing SPARC trademarks are based upon architecture developed by Sun Microsystems, Inc. UNIX is a registered trademark in the U.S. and other countries, exclusively licensed through X/Open Company, Ltd. This product is covered and controlled by U.S. Export Control laws and may be subject to the export or import laws in other countries. Nuclear, missile, chemical biological weapons or nuclear maritime end uses or end users, whether direct or indirect, are strictly prohibited. Export or reexport to countries subject to U.S. embargo or to entities identified on U.S. export exclusion lists, including, but not limited to, the denied persons and specially designated nationals lists is strictly prohibited.

Copyright © 2006 Sun Microsystems, Inc., 4150 Network Circle, Santa Clara, California 95054, Etats-Unis. Tous droits réservés. Sun Microsystems, Inc. détient les droits de propriété intellectuels relatifs à la technologie incorporée dans le produit qui est décrit dans ce document. En particulier, et ce sans limitation, ces droits de propriété intellectuels peuvent inclure un ou plus des brevets américains listés à l'adresse http://www.sun.com/patents et un ou les brevets supplémentaires ou les applications de brevet en attente aux Etats - Unis et dans les autres pays. L'utilisation est soumise aux termes de la Licence. Cette distribution peut comprendre des composants développés par des tierces parties. Sun, Sun Microsystems, le logo Sun, Java, Sun Java Composite Application Platform Suite, Sun, SeeBeyond, eGate, eInsight, eVision, eTL, eXchange, eView, eIndex, eBAM et eWay sont des marques de fabrique ou des marques déposées de Sun Microsystems, Inc. aux Etats-Unis et dans d'autres pays. Toutes les marques SPARC sont utilisées sous licence et sont des marques de fabrique ou des marques déposées de SPARC International, Inc. aux Etats-Unis et dans d'autres pays. Les produits portant les marques SPARC sont basés sur une architecture développée par Sun Microsystems, Inc. UNIX est une marque déposée aux Etats-Unis et dans d'autres pays et licenciée exclusivement par X/Open Company, Ltd. Ce produit est couvert à la législation américaine en matière de contrôle des exportations et peut être soumis à la règlementation en vigueur dans d'autres pays dans le domaine des exportations et importations. Les utilisations, ou utilisateurs finaux, pour des armes nucléaires, des missiles, des armes biologiques et chimiques ou du nucléaire maritime, directement ou indirectement, sont strictement interdites. Les exportations ou réexportations vers les pays sous embargo américain, ou vers des entités figurant sur les listes d'exclusion d'exportation américaines, y compris, mais de manière non exhaustive, la liste de personnes qui font objet d'un ordre de ne pas participer, d'une façon directe ou indirecte, aux exportations des produits ou des services qui sont régis par la législation américaine en matière de contrôle des exportations et la liste de ressortissants spécifiquement désignés, sont rigoureusement interdites.

Version 20060612203810

Contents

Chapter 1

Introduction 6

About Reports 6

What's New in This Release 7

About This Document 7

What's in This Document 7
Scope 7
Intended Audience 8
Text Conventions 8
Screenshots 8

Related Documents 8

Sun Microsystems, Inc. Web Site 9

Documentation Feedback 9

Chapter 2

About eView Studio Reports 10

Learning About Reports 10

About Production Reports 10
About Activity Reports 11
About Search Result Reports 11
Configuring Reports 11
Creating Custom Reports 11
Masked Data 12

Production Reports 12

Assumed Match Report 12
Deactivated Record Report 13
Potential Duplicate Report 13
Merge Transaction Report 13
UnMerge Transaction Report 13
Update Report 14

Activity Reports 14

Weekly Activity Report 14
Monthly Activity Report 14
Yearly Activity Report 15

Search Result Reports 15

Chapter 3

Working with EDM Reports 16

Configuring EDM Reports 16
Configuring the Reports Page 16
Configuring EDM Reports 17

Running EDM Reports 18
Running Production and Activity Reports 18
Running Search Result Reports 20

Chapter 4

Working with Command Line Reports 22

Before you Begin 22

Configuring the Command Line Report Environment 22
Copy Generated Project Files 22
Set up the Environment 23

Configuring Command Line Reports 23
Define the Command Line Report Configuration 24
Configure Command Line Reports 24

Running Command Line Reports 27

Appendix A

Sample EDM Reports 29

Production Reports 29
Assumed Match Report 29
Potential Duplicate Report 31
Deactivated Record Report 33
Merge Transaction Report 35
Unmerge Transaction Report 37
Updated Record Report 39

Activity Reports 41
Weekly Activity Report 41
Monthly Activity Report 43
Yearly Activity Report 45

Search Result Reports 47

Appendix B

Sample Command Line Reports 49

Production Reports 49
- Assumed Match Report 49
- Potential Duplicate Report 51
- Deactivated Record Report 53
- Merge Transaction Report 55
- Unmerge Transaction Report 57
- Update Report 59

Activity Reports 61
- Weekly Activity Report 61
- Monthly Activity Report 63
- Yearly Activity Report 65

Index 67

Chapter 1

Introduction

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

What's in This Chapter

- **About Reports** on page 6
- **What's New in This Release** on page 7
- **About This Document** on page 7
- **Related Documents** on page 8
- **Sun Microsystems, Inc. Web Site** on page 9
- **Documentation Feedback** on page 9

1.1 About Reports

The Sun SeeBeyond eView™ Studio (eView Studio) provides a set of production and activity reports that are generated using the Enterprise Data Manager (EDM) or via the command line using a *report client*. The production reports provide information about the current state of the data in the master index, helping you monitor stored data and determine how that data needs to be updated. Report information also helps verify that the matching logic and weight thresholds are defined correctly. Activity reports provide statistical information for transactions over specific periods of time. In addition, the EDM allows you to print the results of certain types of searches.

The report client reports are written in Java and run as a Java command. In order to run these reports, you must have the Java Runtime Environment (JRE) 1.4.1 or later installed on the machine where the report files reside. There are no special requirements for running the reports from the EDM.

For additional reporting needs, the database is accessible using any commercially available ODBC-compliant reporting tool. You can also define reports using Java, PL/SQL, or SQL.

1.2 What's New in This Release

This release provides the ability to generate reports from the EDM in addition to the report client reports. The EDM reports are configured in the Enterprise Data Manager configuration file of the master index Project, and are run from the new Reports tab of the EDM. In addition, this release includes the ability to print a complete list of search results from the EDM. The reports can now be limited to a specific number of enterprise records or, for potential duplicate reports, to records of a specific status.

1.3 About This Document

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

1.3.1. What's in This Document

This guide is divided into the chapters and appendixes listed below.

- **Chapter 1 "Introduction"** gives a general preview of this document—its purpose, scope, and organization—and provides sources of additional information.
- **Chapter 2 "About eView Studio Reports"** gives an overview of the reports that are generated by default for the master index.
- **Chapter 3 "Working with EDM Reports"** gives instructions for running the standard reports from the Enterprise Data Manager.
- **Chapter 4 "Working with Command Line Reports"** gives instructions for running the standard reports using the report client.
- **Appendix A "Sample EDM Reports"** gives a sample of each EDM report provided with eView Studio.
- **Appendix B "Sample Command Line Reports"** gives a sample of each command line report provided with eView Studio.

1.3.2 Scope

This guide provides step-by-step instructions for working with the standard reports provided with eView Studio. It includes navigational information, functional instructions, and background information where required. This guide does not include information or instructions on using eView Studio, the Enterprise Data Manager (EDM), or eGate Integrator components. These topics are covered in the appropriate user guide (for more information, see **"Related Documents" on page 8**).

1.3.3. Intended Audience

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

1.3.4 Text Conventions

The following conventions are observed throughout this document.

Table 1 Text Conventions

Text Convention	Used For	Examples
Bold	Names of buttons, files, icons, parameters, variables, methods, menus, and objects	▪ Click **OK**. ▪ On the **File** menu, click **Exit**. ▪ Select the **eGate.sar** file.
`Monospaced`	Command line arguments, code samples; variables are shown in ***bold italic***	`java -jar` ***`filename`***`.jar`
Blue bold	Hypertext links within document	See **Text Conventions** on page 8
Blue underlined	Hypertext links for Web addresses (URLs) or email addresses	http://www.sun.com

1.3.5 Screenshots

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

1.4 Related Documents

Sun has developed a suite of user's guides and related publications that are distributed in an electronic library. The following documents might provide information useful in creating your customized index. In addition, complete documentation of the eView Studio Java API is provided in Javadoc format.

- *Sun SeeBeyond Enterprise Data Manager User's Guide*
- *Sun SeeBeyond eView Studio User's Guide*
- *Sun SeeBeyond eView Studio Configuration Guide*
- *Sun SeeBeyond eView Studio Reference Guide*

1.5 Sun Microsystems, Inc. Web Site

The Sun Microsystems web site is your best source for up-to-the-minute product news and technical support information. The site's URL is:

http://www.sun.com

1.6 Documentation Feedback

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

CAPS_docsfeedback@sun.com

Chapter 2

About eView Studio Reports

Several standard reports are provided with eView Studio that allow you to monitor and review the state of the information in the master index database. This chapter provides an overview of each report.

What's in this Chapter

- **Learning About Reports** on page 10
- **Production Reports** on page 12
- **Activity Reports** on page 14
- **Search Result Reports** on page 15

2.1 Learning About Reports

eView Studio provides a set of production and activity reports that can be generated from a command line. The same reports can also be generated from the Enterprise Data Manager (EDM), along with additional search result reports that are specific to the EDM. The production reports provide information about the current state of the data in the master index, helping you monitor stored data and determine how that data needs to be updated. This information also helps verify that the matching logic and weight thresholds are defined correctly. Activity reports provide statistical information for transactions over specific periods of time. Search Result reports, available only from the EDM, allow you to print a list of enterprise records in a search result set.

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

2.1.1 About Production Reports

Production reports should be run daily and provide information about the transactions that are processed through the master index database. These reports provide lists of potential duplicate records, merge transactions, unmerge transactions, assumed matches, updates, and deactivated records for a specified time period. The information you find in these reports helps you analyze your matching threshold configuration, and

provides valuable information about how data is being processed with your current configuration. In addition to running the production reports daily, you should run them against any data that has been loaded from existing systems into the master index database in batch format. Production reports can be run from either a command line or the EDM.

2.1.2 About Activity Reports

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

2.1.3 About Search Result Reports

When working with the EDM, you can print a complete list of the results from the searches supported by the EDM. This allows you to view a complete list of all records in a result set rather than viewing them one page at a time.

2.1.4 Configuring Reports

The report files are configured by XML files. For the command line reports, the configuration files are located in the report home directory in the **config** subdirectory. The file **eViewCompanyReport.xml** provides an example of how the file might be configured for a company object; the file **eIndexPersonReport.xml** provides an example of how the file might be configured for a person object. You can use either file for your reports. The reports run from the EDM are configured in the Enterprise Data Manager configuration file, located in the master index Project. You can also use the eView Wizard to specify the fields that appear on reports.

For command line reports, the configuration file allows you to specify which reports to run, the time period of the transactions to include in each report, and the name and location of the report files. You can also define various report details, such as the name of each report, which fields to include, and the names and sizes of the report columns. The Enterprise Data Manager configuration file allows you to specify the same options, with the exception of the time period, which is specified when the reports are run from the EDM. Most of these changes should only need to be made one time, before you first run the reports.

2.1.5 Creating Custom Reports

If the standard reports provided with eView Studio do not provide you with all the information you need, you can create custom reports. You can create custom reports using PL/SQL, SQL, or Java (using the “lookup” methods in the MasterController class). You can also access the database using any ODBC-compliant report writer (such

as Crystal Reports), providing you with the flexibility to report on any information contained in the master index database.

2.1.6 Masked Data

The EDM can be configured to hide certain fields from users who do not have the appropriate security permissions. However, reports generated from both the EDM and the command line will display hidden data if those fields are configured to appear on the reports. Be sure to only give access to users who should be able to view this information, or do not include hidden fields in the reports.

2.2 Production Reports

The standard production reports help you to monitor and analyze the data in the master index database. You can view information about the transactions processed and about any potential duplicates or assumed matches that result from these transactions.

Each report has certain fields that are always displayed and certain fields that are configured to display. You can customize the configured fields that appear on each report as needed. By default, **eViewCompanyReport.xml** configures all reports to include the company name, type, stock symbol, primary contact, street address, city, and telephone number fields. **eIndexPersonReport.xml** configures all reports to include the first name, last name, date of birth, SSN, and address line 1 and 2 fields. The fields that are always displayed are described for each report in the following sections.

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

2.2.1 Assumed Match Report

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

The assumed match report always includes the following information about the record that was updated: enterprise-wide unique identifier (EUID), system code, local ID, and matching weight. The report provides the same information for the incoming message that updated the existing record with the exception of the EUID. You can configure the report to include any additional fields from the defined object structure (in the Object Definition file in the master index Project). For a sample of the assumed match report, see **"Assumed Match Report" on page 49**.

2.2.2 Deactivated Record Report

This report displays a list of all enterprise records that were deactivated during the specified time period. This report does not include system records that were deactivated. Review this report daily to ensure that no records were deactivated in error. eView Studio provides the ability to reactivate any deactivated record. The deactivated record report always includes the EUID of the deactivated record, and you can configure the report to include any additional fields from the defined object structure (in the Object Definition file in the master index Project). For a sample of this report, see **"Deactivated Record Report" on page 53**.

2.2.3 Potential Duplicate Report

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

If same system matching is not enabled and two duplicate records from the same system on this report have a matching weight above the match threshold, it is an indication that the records most likely represent the same person. Review the potential duplicate report daily to determine if two records need to be merged or if they can be resolved. Use this report as a work list when working with potential duplicates. For a sample of this report, see **"Potential Duplicate Report" on page 51**.

2.2.4 Merge Transaction Report

This report displays a list of all enterprise records that were merged during the specified time period. Review this report daily to ensure that no records were merged in error. eView Studio provides the ability to unmerge any merged records. The merge transaction report always includes the EUID of each record affected by the merge. You can also configure the report to include any additional fields from the defined object structure (in the Object Definition file in the master index Project). For a sample of this report, see **"Merge Transaction Report" on page 55**.

2.2.5 UnMerge Transaction Report

This report displays a list of all enterprise records that were unmerged during the specified time period. This report always includes the EUIDs of both records involved in the unmerge transaction, and you can configure the report to include any additional fields from the defined object structure (in the Object Definition file in the master index Project). For a sample of this report, see **"Unmerge Transaction Report" on page 57**.

2.2.6 Update Report

This report displays records whose information was updated during the specified time period. Review this report daily to verify the updates made in a given day. This report can help explain why a resolved potential duplicate listing was reinstated to the potential duplicate list. The update report always includes the following information about the record that was updated: EUID, system code, and local ID. You can configure the report to include any additional fields from the defined object structure (in the Object Definition file in the master index Project). The updated fields might not necessarily appear on this report. For a sample of the update report, see **"Update Report" on page 59**.

2.3 Activity Reports

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

2.3.1 Weekly Activity Report

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

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

For a sample of the weekly activity report, see **"Weekly Activity Report" on page 61**.

2.3.2 Monthly Activity Report

This report displays a summary of transactions that occurred against the database during the specified month. You can run this report for any calendar month. The

information provided in this summary includes the number of each of the following transactions that were performed for the month:

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

For a sample of the monthly activity report, see **"Monthly Activity Report" on page 63**.

2.3.3 Yearly Activity Report

This report displays a summary of transactions that occurred against the database for the specified calendar year. You can run this report for any calendar year. The information provided in this report includes a summary of each transaction listed for the monthly activity report above. For a sample of the yearly activity report, see **"Yearly Activity Report" on page 65**.

2.4 Search Result Reports

In addition to viewing a search result list on an EDM window, you can create and print a search result report. You can generate search result reports for general, transaction history, assumed match, potential duplicate, and audit log search results. These reports are accessed from the Search Results page for the search you performed. Search result reports can be viewed online or sent to a printer of your choice. The fields that appear on the reports depend on the fields that appear on the Results page for the type of search you performed. For a sample of a search results report, see **"Search Result Reports" on page 47**.

Chapter 3

Working with EDM Reports

This chapter provides information and instructions for configuring and running reports from the Enterprise Data Manager.

What's in This Chapter

- **Configuring EDM Reports** on page 16
- **Running EDM Reports** on page 18

3.1 Configuring EDM Reports

Before running production and activity reports from the EDM, you must customize the Enterprise Data Manager file. This file is located in the master index Project and created by the eView Wizard. From the wizard, you can specify which fields appear on the reports. You can further configure the reports by modifying the Enterprise Data Manager file. Report configuration consists of the following two steps.

- **Configuring the Reports Page** on page 16
- **Configuring EDM Reports** on page 17

3.1.1 Configuring the Reports Page

The report configuration section of the Enterprise Data Manager configuration file defines the appearance of the Reports page, and is located within a set of **reports** tags near the end of the file.

All of the elements mentioned in the instructions below are described in Table 2.

To configure the Reports page

1. In the Enterprise Data Manager configuration file, scroll to the **reports** element. This is located near the end of the file.
2. Specify the name of the parent object in the **root-object** element.
3. Specify the name of the reports tab in the **tab-name** element.
4. Specify the number of fields to display in each row of the Reports page in the **search-page-field-per-row** element.
5. When you have finished configuring the Reports page, save the file.

Table 2 General EDM Report Configuration Elements

Element	Description
root-object	The name of the type of object on which to report (this must be the parent object).
tab-name	A name for the report pages. This name appears on tab label associated with the report pages on the EDM.
tab-entrance	The URL to the entry page of the reports pages. This element should not be modified.
search-page-field-per-row	The number of fields to display in each row of the reports page.

3.1.2 Configuring EDM Reports

A configuration section is defined for each of the six production report templates and for each of the three activity reports. Use these sections to configure each production and activity report to display information as you want to view it. You can also specify which reports can be run from the EDM.

To configure EDM reports

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

1. In the Enterprise Data Manager configuration file, scroll to the **reports** element. This section is located near the end of the file.
2. Specify the type of report in the report **name** attribute.
3. Specify a title for the report in the **title** attribute.
4. Specify whether or not to run the report in the **enable** element.
5. Specify the maximum number of records to return from a report search in the **max-result-size** element.
6. For production reports only, define the fields to include on the report by modifying, adding, or removing **field** elements.
7. When you have finished configuring each report, save and close the file.

Table 3 EDM Report Configuration Elements

Element/Attribute	Description
report	Defines each report run by the EDM with the exception of search reports (which do not need to be configured). Each report is defined by a **report** element.

Table 3 EDM Report Configuration Elements

Element/Attribute	Description
report/name	The type of report being generated. You should not need to modify this attribute, but you can specify any of the following reports. ▪ Assumed Match ▪ Potential Duplicate ▪ Deactivated ▪ Merged ▪ Unmerged ▪ Update ▪ Weekly Activity ▪ Monthly Activity ▪ Yearly Activity
report/title	The descriptive name of the report. This can be any string and appears as the title in the specified report.
enable	Specifies whether the report can be run from the EDM. Specify “true” to allow the report to be run; specify “false” to disable the report.
max-result-size	The number of records to display on the report. If no value is entered, or if the value is zero (0), the size defaults to 1000 records. To retrieve all records for a report, enter a very large value for this element.
page-size	The number of records returned to the report generator at one time for each report. If you do not enter a page size or you enter “0”, the size defaults to 500 records for all reports.
fields/field-ref	A list of fields to display on the report in addition to those that are displayed automatically. Use the simple field name for the **field-ref** value (simple field names are described in the *Sun SeeBeyond eView Studio Configuration Guide*). This element should be empty for the activity reports; if a list of fields is supplied for any activity reports, it is ignored.

3.2 Running EDM Reports

Once you have configured the reports, any user with the appropriate security permissions can run the production, activity, and search reports from the Enterprise Data Manager (EDM).

Running Production and Activity Reports

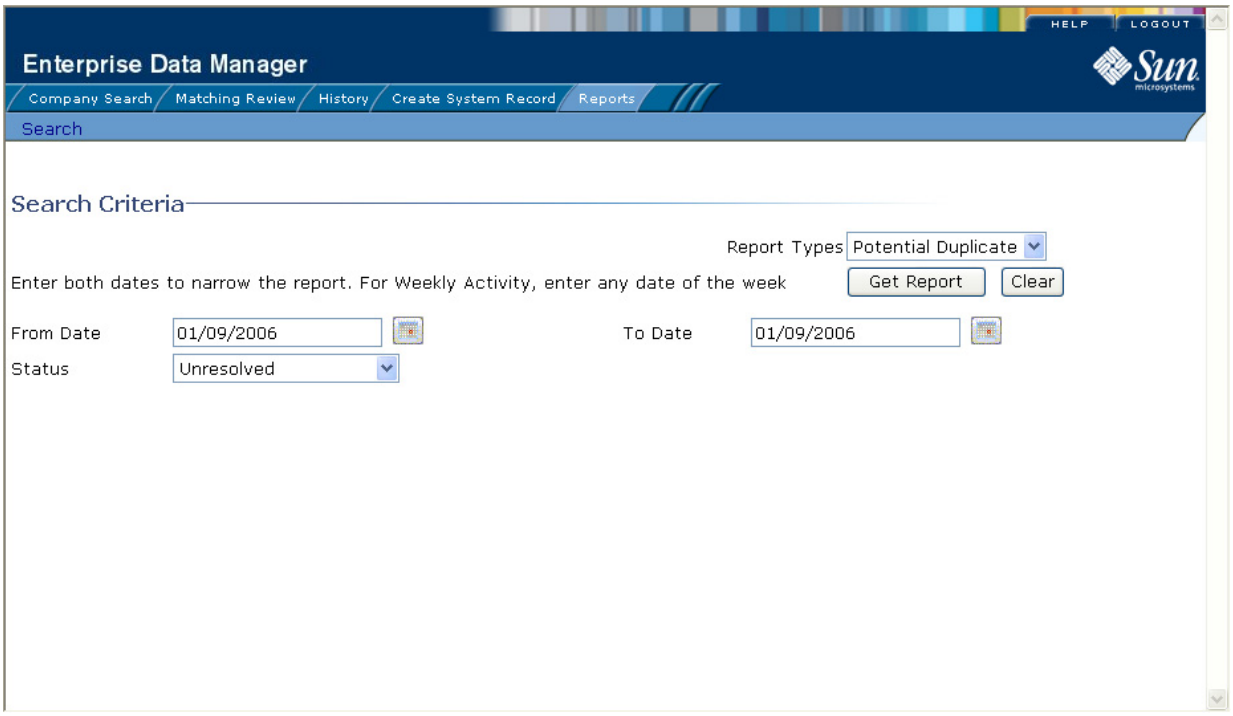
Both production and activity reports are run from the Reports tab on the EDM.

To run reports from the EDM

1. Log on to the EDM, and then click the Reports tab.

   The Reports Search page appears (see **Figure 1 on page 19**).

Figure 1 Reports Search Page



2. On the Reports Search page, select the type of report to run from the **Report Types** list, and then fill in the search criteria (see **"About Report Search Fields"** following this procedure).
3. Click **Get Report**.

   The selected report appears.
4. To print the report, click **Print** in the upper right portion of the window.

About Report Search Fields

The fields on the Report Search page let you specify a date range for each report. For Potential Duplicate reports, you can also specify the status of the potential duplicates returned by the search. For the Weekly Activity Report, you only need to enter one date; the report will automatically display information for the calendar week containing that date.

Table 4 Report Search Fields

In this field …	type or select …
From Date	The start date for the report. The report will retrieve transactions that occurred beginning on this date through the date specified in the **To Date** field.
To Date	The end date for the report.

Table 4 Report Search Fields

In this field …	type or select …
Status	For Potential Duplicate reports only, the status of the potential duplicate pairs to retrieve. You can specify all statuses by leaving this field blank, or you can select Resolved, Unresolved, or Permanently Resolved. This field is not visible for any other type of report.

Running Search Result Reports

Search Result reports are run from the Search Results page that appears after you perform a general, transaction history, assumed match, potential duplicate, or audit log search.

To run a Search Result report

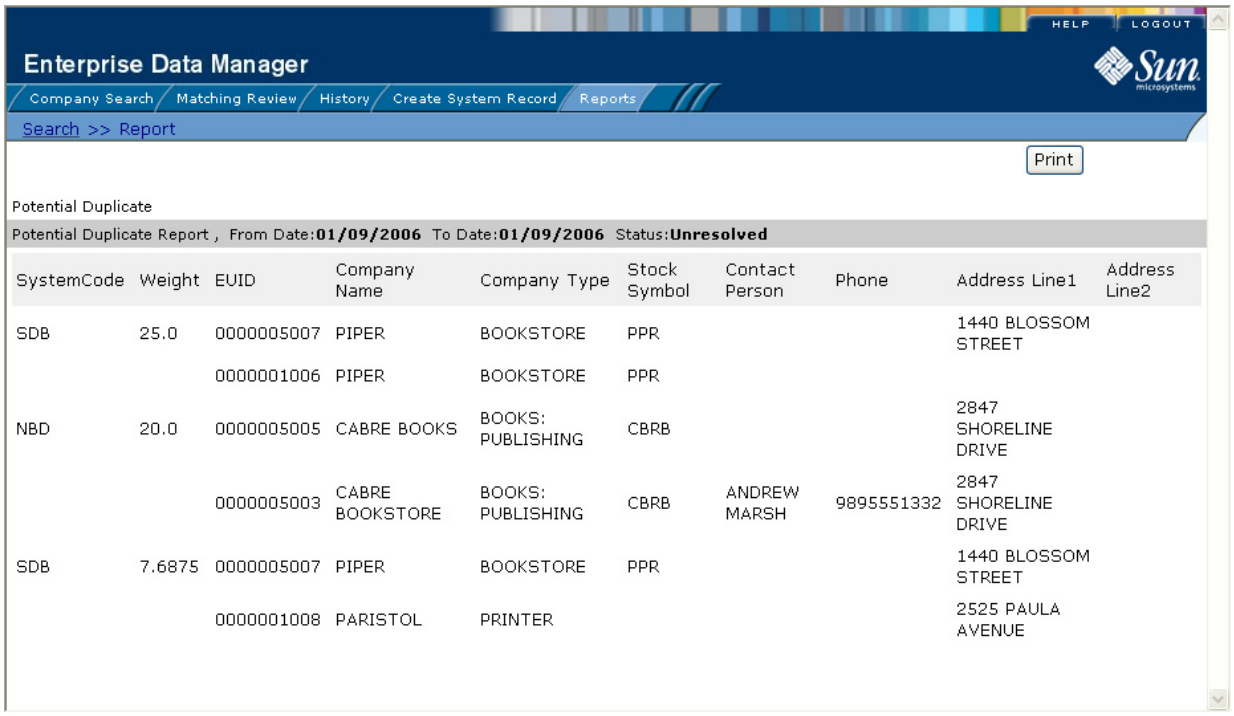
1. Perform any type of search, as described in the *Sun SeeBeyond Enterprise Data Manager User's Guide*.

Note: *You cannot print a search result report for a search that results in only one matching record, since the Results page does not appear in that case and the View/Edit page appears instead.*

2. On the search results page, click **Print Report...** in the upper right section of the page.

   The Search Result Report page appears.

Figure 2 Potential Duplicate Search Result Report Page



SystemCode	Weight	EUID	Company Name	Company Type	Stock Symbol	Contact Person	Phone	Address Line1	Address Line2
SDB	25.0	0000005007	PIPER	BOOKSTORE	PPR			1440 BLOSSOM STREET	
		0000001006	PIPER	BOOKSTORE	PPR				
NBD	20.0	0000005005	CABRE BOOKS	BOOKS: PUBLISHING	CBRB			2847 SHORELINE DRIVE	
		0000005003	CABRE BOOKSTORE	BOOKS: PUBLISHING	CBRB	ANDREW MARSH	9895551332	2847 SHORELINE DRIVE	
SDB	7.6875	0000005007	PIPER	BOOKSTORE	PPR			1440 BLOSSOM STREET	
		0000001008	PARISTOL	PRINTER				2525 PAULA AVENUE	

3 To print the report, click **Print** in the upper right section of the page.

Chapter 4

Working with Command Line Reports

This chapter provides information and instructions for configuring and running reports from a command line using a Java command.

What's in This Chapter

- **Before you Begin** on page 22
- **Configuring the Command Line Report Environment** on page 22
- **Configuring Command Line Reports** on page 23
- **Running Command Line Reports** on page 27

4.1 Before you Begin

Before you begin working with the report client, make sure the reports have been installed as described in chapter 3 of the *Sun SeeBeyond eView Studio User's Guide*. You must also have the Java 2 Platform, Standard Edition v. 1.4.1 or later installed on the machine from which the reports are run. Be sure you have configured the database connection in the master index Project. This is also described in the *Sun SeeBeyond eView Studio User's Guide*.

4.2 Configuring the Command Line Report Environment

Before running the master index reports from a command line, you must configure the report environment. Perform the following steps before running the reports.

- **Copy Generated Project Files** on page 22
- **Set up the Environment** on page 23

4.2.1 Copy Generated Project Files

The reports rely on two files, **stc_eindex_client.jar** and **stc_eindex_util.jar**, that are generated in the master index Project in Enterprise Designer. You need to export these files to the reports directory. If the Project is regenerated at any time, the files should be exported to the reports directory again when the generate process is complete,

To copy the generated files

1. In the Project Explorer of Enterprise Designer, expand the master index server Project.
2. Select, and then right click, the **<Application>_stc_eindex_client.jar** file (where <Application> is the name of the eView Studio application).
3. On the context menu that appears, click **Export**.

   The **Save** dialog appears.
4. In the **Save In** field, enter, or navigate to, the **lib** subdirectory in the reports home directory.
5. Click **Save**.
6. Repeat steps 2 through 5 to export the **<Application>_stc_eindex_util.jar** file (where <Application> is the name of the eView Studio application).
7. In Windows Explorer, navigate to the **lib** subdirectory and rename the file **<Application>stc_eindex_client.jar**. to **stc_eindex_client.jar**, and rename the file **<Application>stc_eindex_util.jar**. to **stc_eindex_util.jar**.

4.2.2 Set up the Environment

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

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

4.3 Configuring Command Line Reports

Before running any reports from the command line, you must customize the XML configuration file. This file is located in the reports directory in either the eView or eIndex subdirectory. The default eIndex XML file, named **eIndexPersonReport.xml**, is defined for a person object, and the default eView XML file, named **eViewCompanyReport.xml**, is defined for a company object. You can use either of these as a basis for your production configuration file. Report configuration includes two steps: defining the overall report configuration and configuring the individual reports.

4.3.1 Define the Command Line Report Configuration

The first section of the report configuration file is indicated by the **DOCTYPE** and the **report** tags and tells the report client how to connect to the integration or application server, which application to run the reports against, and where to output the report files. Modify any of the elements described in Table 5 to define the general report configuration.

Table 5 Command Line Report Configuration Elements

Element	Description
DOCTYPE	The type of document being generated. Do not change this value.
SYSTEM	The location of the DTD file for the reports. By default, this file is named **report.dtd**, and is located in the **config** directory. You should not need to modify this attribute unless you move **report.dtd**.
appserver	The IIOP address for the integration or application server. This must be in the format **iiop://<*hostname*>:<*port*>**, where <*hostname*> is the name of the server for the IS and <*port*> is the ORB port number. (The port number is found in the **ORB** property on the Domain Manager.)
application	The name of the primary object used by the master index.
output-folder	The location in which the generated reports will be placed. If an output directory is specified in the command line, that directory overrides the one specified here. If the output directory already exists, the report client issues a warning that any existing report files will be overwritten and gives you the option of cancelling the reports.

4.3.2 Configure Command Line Reports

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

To configure individual reports

For each report, make the following modifications before running the reports. Each element or attribute mentioned in the following instructions is defined in Table 6. There are six stanzas for you to modify, one for each report.

1. In the XML file you will use for your implementation, scroll to the **report** element.
2. Name the report in the report **name** attribute.
3. Specify whether or not to run the report in the **enable** element.
4. Define the name of the output file in the **output-file** element.
5. Specify a time period for the report by modifying the **type** element and, optionally, the **from-date** and **to-date** elements.

6 Define the fields to include on the report by modifying the elements in the **fields** element.

7 When you have finished configuring each report, save and close the file.

A sample report configuration appears below.

```
<report name="Potential Duplicate Today"
 template="Potential Duplicate">
  <enable>true</enable>
  <output-file>pot_dup_t.txt</output-file>
  <max-result-size>0</max-result-size>
  <page-size>100</page-size>
  <criteria>
    <dates type="today" from-date="" to-date=""/>
    <status></status>
  </criteria>
  <fields>
    <field path="Person.FirstName" label="First Name" width="10"/>
    <field path="Person.LastName" label="Last Name" width="10"/>
    <field path="Person.SSN" label="SSN" width="9"/>
    <field path="Person.DOB" label="DOB" width="10"/>
    <field path="Person.Address.AddressLine1"
      label="AddressLine1" width="30"/>
    <field path="Person.Address.AddressLine2"
      label="AddressLine2" width="30"/>
   </fields>
</report>
```

Table 6 Individual Report Configuration Elements

Element/Attribute	Description
report	Defines each report run by the batch file. Each report is defined by a report element.
report/name	The descriptive name of the report. This can be any string, and appears as the title in the specified report.
report/template	The template to use for the type of report being generated. You should not need to modify this element, but you can specify any of the following templates. ▪ Assumed Match ▪ Potential Duplicate ▪ Deactivated ▪ Merged ▪ Unmerged ▪ Update ▪ Weekly Activity ▪ Monthly Activity ▪ Yearly Activity
enable	Specifies whether to run the report for the current run. Specify “true” to run the report; specify “false” to disable the report. This option allows you to run one report at a time.

Table 6 Individual Report Configuration Elements

Element/Attribute	Description
output-file	The name of the file generated by the report client . This file is created in the output directory defined earlier in the file or in the output directory specified in the command line (the command line output directory overrides the configuration file output directory).
max-result-size	The number of records to display on the report. If no value is entered, or if the value is zero (0), the size defaults to 1000 records. To retrieve all records for a report, enter a very large value for this element.
page-size	The number of records returned to the report generator at one time for each report. If you do not enter a page size or you enter "0", the size defaults to 500 records for all reports.
criteria	Defines the date range for the report.
dates/type	Indicates the type of date range to use for the report. Specify "today" to report on transactions with today's date; specify "yesterday" to report on transactions with yesterday's date; or specify "range" to enter a specific range of dates. If you specify "range", you must enter the date range in the **from-date** and **to-date** attributes. ***Note:*** *If you enter a type of "today" or "yesterday" and you enter a date range, only the type will be used. For the activity reports, entering "today" runs the report for the current week, month, or year. Entering "yesterday" only runs the previous week's report if yesterday was a Saturday.*
dates/from-date	The starting date when using a date range for the report. Enter the starting date for the report transactions in **YYYYMMDD** format. If you enter a date in this element, you must enter a later date in the **to-date** element and specify "range" in the **type** element. ***Note:*** *For the activity reports, you can enter the range for the week, month, or year (depending on the type of activity report) on which you want to report. If the dates you specify do not fall within one calendar week, month, or year, the report client creates a report for the calendar week, month, or year containing the* ***from-date*** *and ignores the* ***to-date*** *value.*
dates/to-date	The ending date when using a date range for the report. Enter the ending date for the report in **YYYYMMDD** format.

Table 6 Individual Report Configuration Elements

Element/Attribute	Description
status	This element is valid for the potential duplicate report only, and indicates the status of the potential duplicate pairs to display on the report. Specify any of the following values: ▪ **U** - Only unresolved potential duplicates appear on the report. ▪ **A** - Only potential duplicates that are permanently resolved (auto-resolved) appear on the report. ▪ **R** - Only resolved potential duplicates appear on the report. Leaving the status blank results in potential duplicates of all statuses appearing on the report.
fields	A list of fields to display on the report in addition to those that are displayed automatically. This element should be empty for the activity reports. If a list of fields is supplied for these reports, it is ignored.
field/path	The ePath to a field you want to include in the report. For more information about ePaths, see "Field Notations" in the *Sun SeeBeyond eView Studio User's Guide*. ***Note:*** *You cannot use the asterisk option in the ePaths you specify here.*
field/label	The column label for the specified field in the report.
field/width	The width of the column for the specified field in the report. If a field value is larger than the width specified, that value will be truncated in the report.

4.4 Running Command Line Reports

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

Note: *The integration or application server must be running with the master index Project deployed and enabled in order to generate command line reports.*

To run the reports using the batch file

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

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

   where

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

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

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

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

To run the reports using a Java command

Important: *Before running the reports for the first time, set up the environment variables as described in* **"Set up the Environment" on page 23**.

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

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

where

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

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

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

Appendix A

Sample EDM Reports

This appendix shows samples of each report as run from the Enterprise Data Manager. The sample reports were created using a standard configuration of the Enterprise Data Manager file based on a master person index that stores demographic and identification information.

What's in This Appendix

- **Production Reports** on page 29
- **Activity Reports** on page 41
- **Search Result Reports** on page 47

A.1 Production Reports

This section describes, and shows samples of, each of the production reports provided with eView Studio.

A.1.1 Assumed Match Report

The assumed match report lists each transaction that occurred in the specified time period in which the master index automatically matched two records because their matching weight fell above the match threshold. Each transaction consists of two lines in the report. The first line is the existing record in the master index database that was updated by the incoming message, and the second line is the system record that updated the existing record. The sample on the following page illustrates the Assumed Match Report. Note that the System Code, Local ID, Weight, and EUID columns always appear in this report. The remaining columns are configurable and you can configure this report to display any of the fields in the object structure defined in the Object Definition file.

Figure 3 EDM Assumed Match Report Sample

HELP LOGOUT

Enterprise Data Manager

Person Search / Matching Review / History / Create System Record / Reports

Search >> Report

Print

Assumed Match

Assumed Match Report , From Date:**01/08/2006** To Date:**01/11/2006**

SystemCode	Local Id	Weight	EUID	First Name	Last Name	SSN	DOB	Address Line 1	Address Line 2	Phone
SLH	52525252	36.0	0000005002	MARGO	TAYLOR	555445555	12/12/1970			
				MARGO	TAYLOR	555445555	12/12/1970			
WHC	3467799	36.0	0000005004	ETHEL	WARTON	111222111	05/14/1954	1543 JONES AVE.		
				ETHEL	WARTON	111222111	05/14/1954	12900 SHORELINE DRIVE	SUITE 210	
WHC	8374646	36.0	0000005005	MARK	JACOBSON	999888999	04/14/1964	7473 WAYFIELD ROAD		
				MARC	JACOBSON	999888999	04/14/1964	2526 MARTINDALE WAY		
WHC	2347755	36.0	0000005008	JOHNATHON	WARNER	888777888	10/10/1980	5950 PAULA STREET	UNIT 5	

A.1.2 Potential Duplicate Report

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

The sample on the following page illustrates the Potential Duplicate report. Note that the System Code, Weight, and EUID columns always appear on this report. The remaining columns are configurable and you can configure this report to display any of the fields in the object structure defined in the Object Definition file.

Figure 4 EDM Potential Duplicate Report Sample

HELP LOGOUT

Enterprise Data Manager

Person Search / Matching Review / History / Create System Record / Reports

Search >> Report

Print

Potential Duplicate

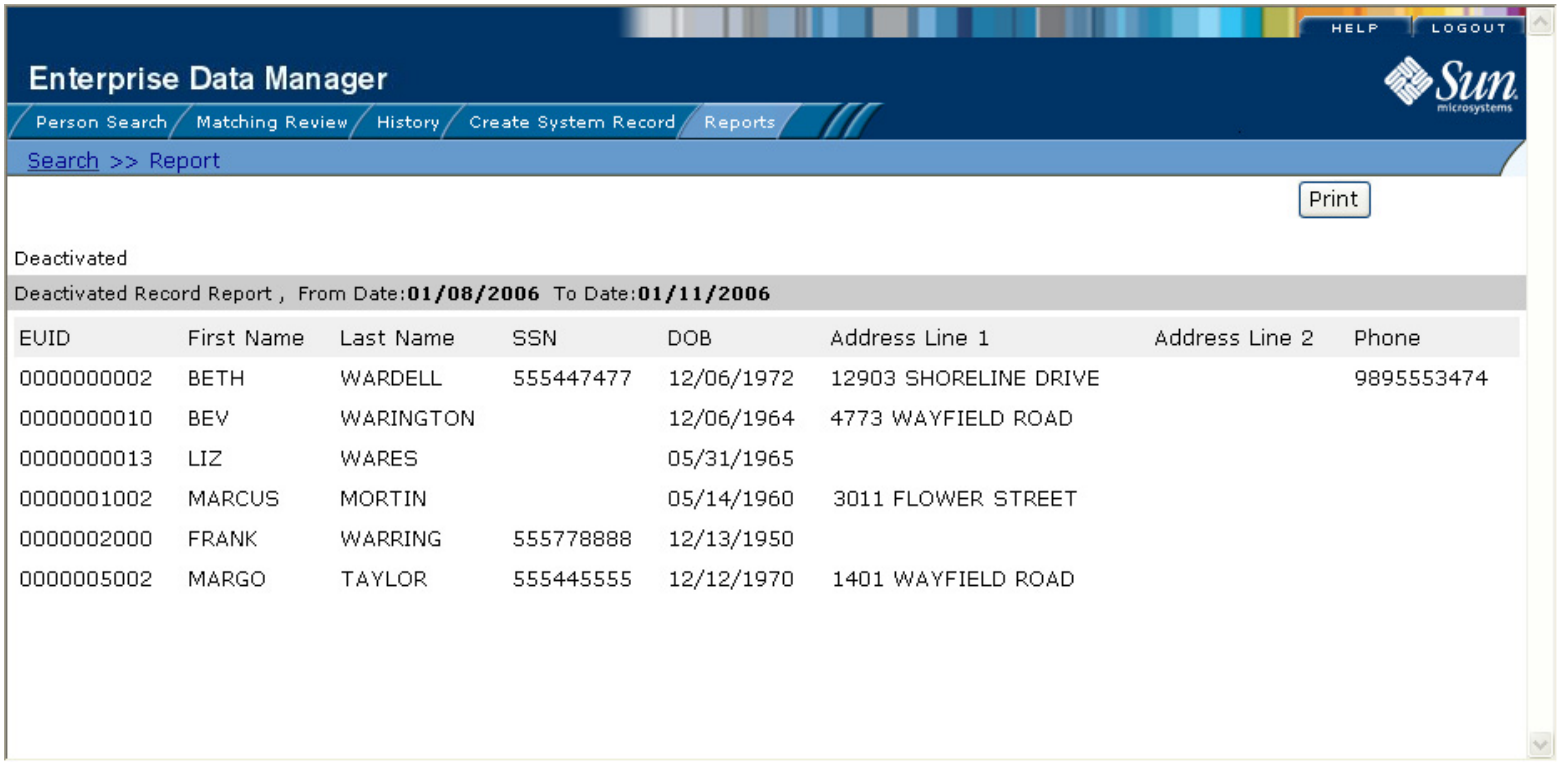
Potential Duplicate Report , From Date:**01/01/2006** To Date:**01/10/2006** Status:**Unresolved**

SystemCode	Weight	EUID	First Name	Last Name	SSN	DOB	Address Line 1	Address Line 2	Phone
WHC	31.0	0000004000	ELIZABETH	WARNER		05/14/1964			
		0000000014	ELIZABETH	WARNER		05/14/1964			
CBMC	27.4375	0000004000	ELIZABETH	WARNER		05/14/1964			
		0000001000	LIZA	WARDNER	555665555	05/14/1963			9895550403
ADM	23.979166	0000003000	LIZBETH	WARREN	229992222	05/13/1968	1330 FLOWER STREET	UNIT 210	9895556238
		0000000014	ELIZABETH	WARNER		05/14/1964			
WHC	23.631945	0000003001	LIZ	WARNER	555775555	05/22/1968	1130 FLOWER STREET	UNIT 4	9895556822
		0000001000	LIZA	WARDNER	555665555	05/14/1963			9895550403
SLH	23.1875	0000003001	LIZ	WARNER	555775555	05/22/1968	1130 FLOWER STREET	UNIT 4	9895556822
		0000000014	ELIZABETH	WARNER		05/14/1964			
WHC	21.625	0000000000	BETH	WARNER	555444777	12/14/1968	2347 FLOWER STREET		9895553474

A.1.3 Deactivated Record Report

The deactivated record report lists each transaction in which a record was deactivated and that occurred in the specified time period. Each transaction consists of one line in the report. The sample on the following page illustrates the deactivated record report. Note that the EUID column always appears on this report. The remaining columns are configurable and you can configure this report to display any of the fields in the object structure defined in the Object Definition file.

Figure 5 EDM Deactivated Record Report Sample



EUID	First Name	Last Name	SSN	DOB	Address Line 1	Address Line 2	Phone
0000000002	BETH	WARDELL	555447477	12/06/1972	12903 SHORELINE DRIVE		9895553474
0000000010	BEV	WARINGTON		12/06/1964	4773 WAYFIELD ROAD		
0000000013	LIZ	WARES		05/31/1965			
0000001002	MARCUS	MORTIN		05/14/1960	3011 FLOWER STREET		
0000002000	FRANK	WARRING	555778888	12/13/1950			
0000005002	MARGO	TAYLOR	555445555	12/12/1970	1401 WAYFIELD ROAD		

A.1.4 Merge Transaction Report

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

The sample on the following page illustrates the Merge Transaction report. Note that the EUID column always appears on this report. The remaining columns are configurable and you can configure this report to display any of the fields in the object structure defined in the Object Definition file.

Figure 6 EDM Merge Transaction Report Sample

HELP LOGOUT

Enterprise Data Manager

Person Search / Matching Review / History / Create System Record / Reports

Search >> Report

Print

Merged

Merged Transaction Report , From Date:**01/01/2004** To Date:**01/14/2006**

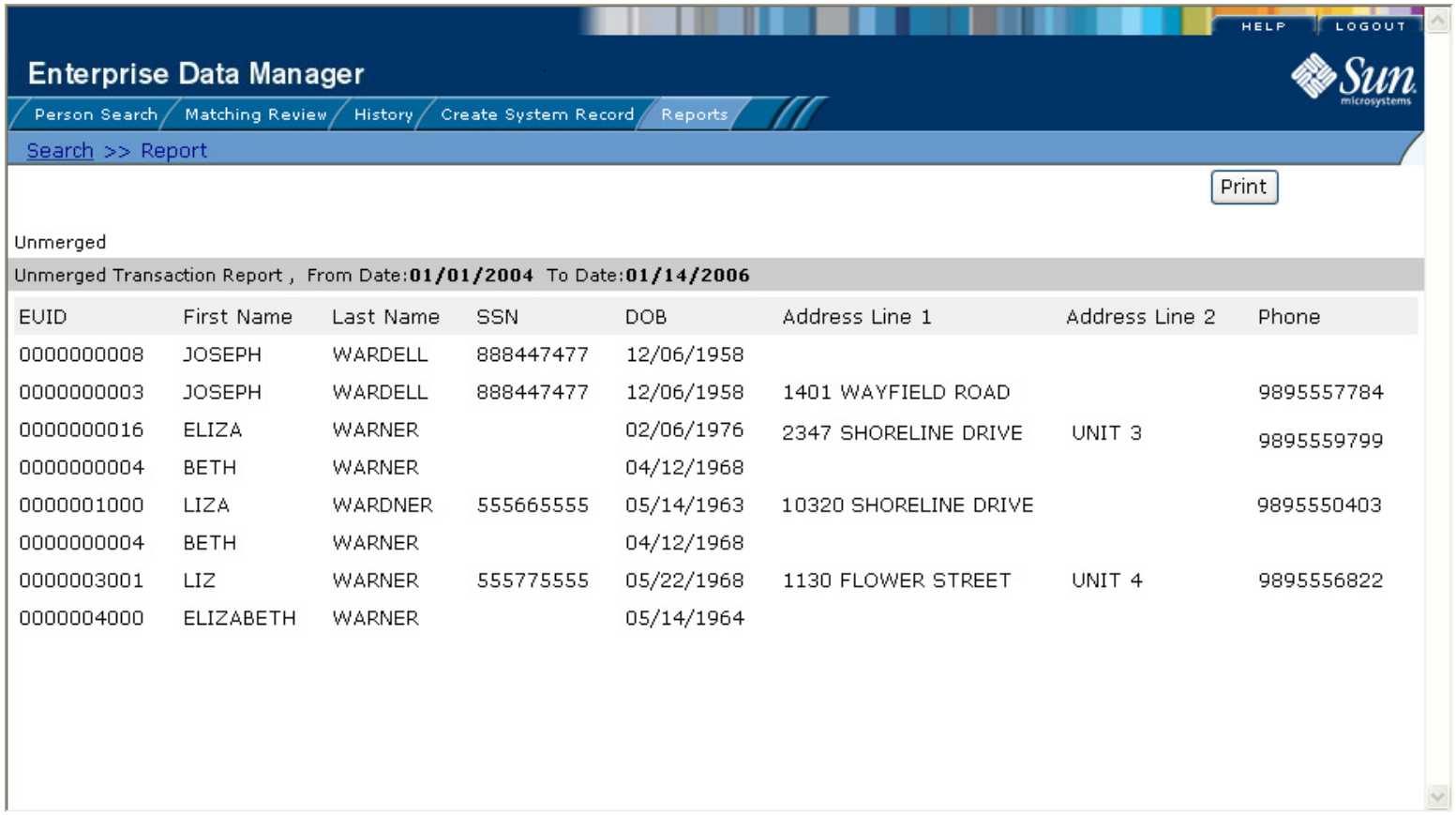
EUID	First Name	Last Name	SSN	DOB	Address Line 1	Address Line 2	Phone
0000000008	JOSEPH	WARDELL	888447477	12/06/1958			
0000000003	JOSEPH	WARDELL	888447477	12/06/1958	1401 WAYFIELD ROAD		9895557784
0000000014	ELIZABETH	WARREN		05/31/1960			
0000001001	ELIZABETH	WARNER		05/14/1964	2347 FLOWER STREET		9895553214
0000000016	ELIZA	WARNER		02/06/1976			9895553474
0000000004	BETH	WARNER		04/12/1968			
0000001000	LIZA	WARDNER	555665555	05/14/1963	10320 SHORELINE DRIVE		9895550403
0000000004	BETH	WARNER		04/12/1968			
0000001001	ELIZABETH	WARNER		05/14/1964	23487 WAYFIELD ROAD	BUILDING 10	
0000000018	ELIZABETH	WARES		05/31/1965	2347 SHORELINE DRIVE	UNIT 3	9895559799
0000001001	ELIZABETH	WARNER		05/14/1964			9895557784
0000000004	BETH	WARNER		04/12/1968			
0000003001	LIZ	WARNER	555775555	05/22/1968	1130 FLOWER STREET	UNIT 4	9895556822

A.1.5 Unmerge Transaction Report

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

The sample on the following page illustrates the Unmerge Transaction report. Note that the EUID column always appears on this report. The remaining columns are configurable and you can configure this report to display any of the fields in the object structure defined in the Object Definition file.

Figure 7 EDM Unmerge Transaction Report Sample



Enterprise Data Manager

HELP LOGOUT

Person Search / Matching Review / History / Create System Record / Reports

Search >> Report

Print

Unmerged

Unmerged Transaction Report , From Date:**01/01/2004** To Date:**01/14/2006**

EUID	First Name	Last Name	SSN	DOB	Address Line 1	Address Line 2	Phone
0000000008	JOSEPH	WARDELL	888447477	12/06/1958			
0000000003	JOSEPH	WARDELL	888447477	12/06/1958	1401 WAYFIELD ROAD		9895557784
0000000016	ELIZA	WARNER		02/06/1976	2347 SHORELINE DRIVE	UNIT 3	9895559799
0000000004	BETH	WARNER		04/12/1968			
0000001000	LIZA	WARDNER	555665555	05/14/1963	10320 SHORELINE DRIVE		9895550403
0000000004	BETH	WARNER		04/12/1968			
0000003001	LIZ	WARNER	555775555	05/22/1968	1130 FLOWER STREET	UNIT 4	9895556822
0000004000	ELIZABETH	WARNER		05/14/1964			

A.1.6 Updated Record Report

The update report lists each transaction in which a record was updated and that occurred in the specified time period. Each transaction consists of two lines in the report. The first line in each transaction is the original record that was updated; the second line shows the updated record. (Due to the limited number of fields on this report, the updated fields might not be visible.)

The sample on the following page illustrates the Updated Record report. Note that the System Code, Local ID, and EUID columns always appear on this report. The remaining columns are configurable and you can configure this report to display any of the fields in the object structure defined in the Object Definition file.

Figure 8 EDM Update Transaction Report

Enterprise Data Manager

HELP LOGOUT

Person Search | Matching Review | History | Create System Record | Reports

Search >> Report

Print

Update

Updated Record Report , From Date:**01/01/2004** To Date:**01/14/2006**

SystemCode	Local ID	EUID	First Name	Last Name	SSN	DOB	Address Line 1	Address Line 2	Phone
CBMC	446614109	0000000000	BETH	WARNER	555444777	12/14/1968	32871 SHORELINE DRIVE	SUITE 15	9895553214
			LIZ	WARNER	555444777	12/16/1976	21347 FLOWER STREET		9895553214
SLH	23948109	0000000000	LIZ	WARNER	555444777	12/16/1976	21347 FLOWER STREET		9895553214
			ELIZA	WARNER	555444477	12/06/1976	2347 FLOWER STREET		9895553474
SLH	23900110	0000000000	ELIZA	WARNER	555444477	12/06/1976	2347 FLOWER STREET		9895553474
			LIZ	WARNER	555444777	12/16/1976	21347 FLOWER STREET		9895553474
CBMC	239400209	0000000001	ELIZABETH	WARREN		05/14/1960	23487 WAYFIELD	BUILDING	9895551346

A.2 Activity Reports

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

A.2.1 Weekly Activity Report

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

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

Figure 9 EDM Weekly Activity Report

Enterprise Data Manager

HELP LOGOUT

Person Search / Matching Review / History / Create System Record / Reports

Search >> Report

Print

Weekly Activity

Transaction Audit Report

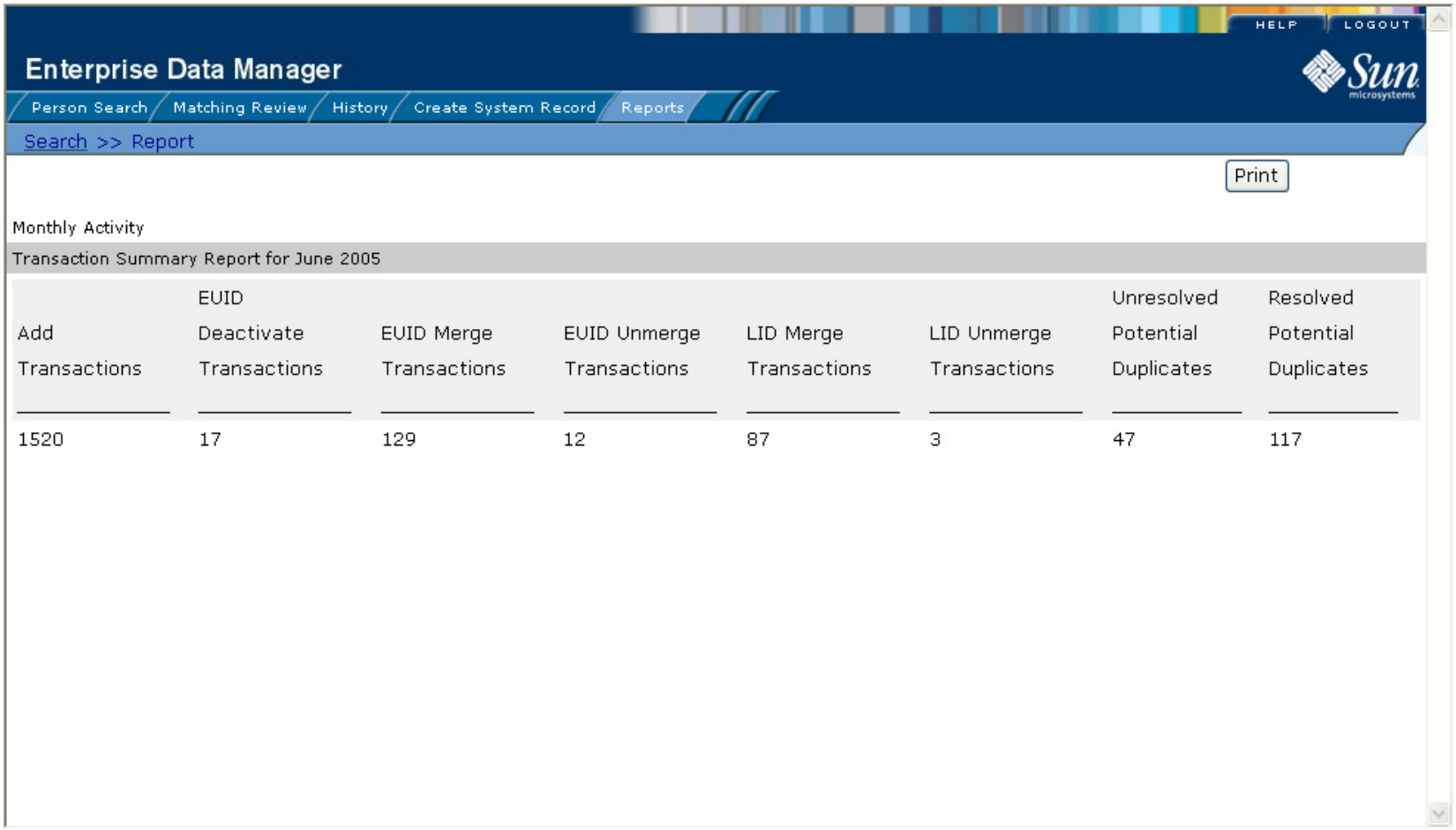
Functions	SUNDAY 06/12/05	MONDAY 06/13/05	TUESDAY 06/14/05	WEDNESDAY 06/15/05	THURSDAY 06/16/05	FRIDAY 06/17/05	SATURDAY 06/18/05	Weekly Total
ADD	58	78	73	48	81	45	45	428
UPDATE	76	84	114	78	74	88	32	546
DEACTIVATE	0	3	0	1	3	0	0	7
EUID MERGE	4	12	17	10	13	0	2	58
EUID UNMERGE	0	1	0	0	3	0	1	5
LID MERGE	2	0	6	8	1	0	1	18
LID UNMERGE	0	0	0	2	1	0	0	3
LID TRANSFER	1	0	3	0	0	1	0	5
==========	=========	=========	=========	==========	=========	=========	=========	=========
Daily Totals	141	178	213	147	176	134	81	1070

A.2.2 Monthly Activity Report

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

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

Figure 10 EDM Monthly Activity Report



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

A.2.3 Yearly Activity Report

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

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

Figure 11 EDM Yearly Activity Report

HELP LOGOUT

Enterprise Data Manager

Person Search / Matching Review / History / Create System Record / Reports

Search >> Report

Print

Yearly Activity

Transaction Summary Report for 2005

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

A.3 Search Result Reports

Search result reports display the results of a search in one printable list. This report displays the same information that appears on the result page for the type of search for which the report is being run. This report can be run for the following types of searches:

- General searches
- Potential Duplicate searches
- Transaction History searches
- Assumed Match searches
- Audit Log searches

The sample on the following page is based on a general alphanumeric search. The appearance of the other reports is similar, but each contains different fields depending on what is displayed on the Results page for each type of search.

Figure 12 General Search Result Report Sample

Enterprise Data Manager

Person Search | Matching Review | History | Create System Record | Reports

Search >> Search Result >> Report

Pr

Person Search Result Report

Advanced Person Lookup (Alpha) criteria: : **F** : **WARN%** : **LIZ**

EUID	Last Name	First Name	Middle Name	DOB	Gender	Mother's Maiden Name	SSN	Maiden Name	Category	Address Type	Address Line 1	Addres Line 2
0000000000	WARNER	BETH	A	12/14/1968	FEMALE	STOLL	555444777	MILLER	PATIENT	HOME ...	2347 FLOWER STREET ...	...
0000000014	WARNER	ELIZABETH	QUINN	05/14/1964	FEMALE							
0000000016	WARNER	ELIZA		02/06/1976	FEMALE				PATIENT			
0000003001	WARNER	LIZ	MACY	05/22/1968	FEMALE	BLANCHE	555775555	LEVALLE	PATIENT	HOME	1130 FLOWER STREET	UNIT 4
0000004000	WARNER	ELIZABETH	MACY	05/14/1964	FEMALE				PATIENT			

Appendix B

Sample Command Line Reports

This appendix shows samples of each command line report provided with eView Studio using the default configuration of the **eIndexPersonReport.xml** file with only the title of the reports modified. They are based on a master person index.

What's in This Appendix

- **Production Reports** on page 49
- **Activity Reports** on page 61

B.1 Production Reports

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

B.1.1 Assumed Match Report

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

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

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

Assumed Match
ASSUMED MATCH REPORT FOR DECEMBER 12, 2003

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

B.1.2 Potential Duplicate Report

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

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

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

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

Potential Duplicate
POTENTIAL DUPLICATE REPORT FOR DECEMBER 12, 2003

SystemCode	Weight	EUID	First Name	Last Name	SSN	DOB	AddressLine1	AddressLine2
WHC	45.0	0000001017	LIZBETH	WARRIN	888777888	1965-02-06	21109 SHORELINE DRIVE	SUITE 12
		0000001009	LIZ	WARRIN	887777788	1965-02-06	21009 SHORELINE DRIVE	SUITE 12
SLH	45.0	0000001018	LIZ	WARES		1965-05-31		
		0000001010	ELIZABETH	WARES		1965-05-31		
CBMC	29.0625	0000001011	LIZ	WARNER		1976-12-16	21347 FLOWER STREET	
		0000001000	BETH	WARNER	555444777	1968-12-14	1330 BLOSSOM STREET	
CBMC	26.25	0000001001	MARCUS	WARING	555444555	1960-05-14	1492 WAYFIELD ROAD	APT. 12
		0000001005	MARCUS	WARING		1960-12-14		
CBMC	26.25	0000001011	LIZ	WARNER		1976-12-16	21347 FLOWER STREET	
		0000001002	ELIZA	WARNER	555444477	1976-02-06	2347 FLOWER STREET	
WHC	21.66666	0000001002	ELIZA	WARNER	555444477	1976-02-06	2347 FLOWER STREET	
		0000001000	BETH	WARNER	555444777	1968-12-14	1330 BLOSSOM STREET	
SLH	18.145834	0000001004	ELIZABETH	WARREN		1960-05-14	23487 WAYFIELD ROAD	BUILDING 10
		0000001009	LIZ	WARRIN	111771111	1965-02-06	21009 SHORELINE DRIVE	SUITE 12
WHC	18.145834	0000001017	LIZBETH	WARRIN	444994444	1965-02-06	21109 SHORELINE DRIVE	SUITE 12
		0000001004	ELIZABETH	WARREN	444994444	1960-05-14	23487 WAYFIELD ROAD	BUILDING 10

B.1.3 Deactivated Record Report

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

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

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

Deactivated
DEACTIVATED RECORD REPORT FOR DECEMBER 12, 2003

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

B.1.4 Merge Transaction Report

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

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

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

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

Merged
MERGE TRANSACTION REPORT FOR DECEMBER 12, 2003

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

B.1.5 Unmerge Transaction Report

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

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

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

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

Unmerged
UNMERGE TRANSACTION REPORT FOR DECEMBER 12, 2003

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

B.1.6 Update Report

The update report lists each transaction in which a record was updated and that occurred in the specified time period. Each transaction consists of two lines in the report. The first line in each transaction is the original record that was updated; the second line shows the updated record. (Due to the limited number of fields on this report, the updated fields might not be visible.) The sample on the following page illustrates the report in its default configuration, which includes the following information:

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

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

Updated
UPDATED RECORD REPORT FOR DECEMBER 12, 2003

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

B.2 Activity Reports

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

B.2.1 Weekly Activity Report

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

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

Weekly Activity
Transaction Audit

Functions	SUNDAY 03/14/04	MONDAY 03/15/04	TUESDAY 03/16/04	WEDNESDAY 03/17/04	THURSDAY 03/18/04	FRIDAY 03/19/04	SATURDAY 03/20/04	Weekly Total
ADD	58	78	73	49	81	45	45	429
UPDATE	76	94	114	78	74	88	32	556
EUID DEACTIVATE	0	3	0	1	3	0	0	7
EUID MERGE	4	12	17	9	14	0	2	58
EUID UNMERGE	0	1	0	0	3	0	1	5
LID MERGE	2	0	6	8	1	0	1	18
LID UNMERGE	0	0	0	2	1	0	0	3
LID TRANSFER	1	0	3	0	0	1	0	5
Daily Totals	141	188	213	147	177	134	81	1081

B.2.2 Monthly Activity Report

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

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

Monthly Activity
Transaction Summary
for March 2004

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

B.2.3 Yearly Activity Report

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

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

Yearly Activity
Transaction Summary
for 2004

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

Index

A

activity reports
  about **11**, **14**
application element **24**
appserver element **24**
assumed match report
  about **12**
  fields **12**, **29**, **49**
  sample **30**, **50**
assumed matches **10**, **11**, **12**

B

batch file **27**

C

CLASSPATH **23**
command line reports
  configuring **24**
  setting up library files **22**
configuration **23**, **24**
  for EDM reports **16**
configuration file **11**, **23**
criteria element **26**
custom reports **11**

D

database connection **22**
dates element **26**
deactivated record report
  about **13**
  fields **13**, **33**, **53**
  sample **34**, **54**
deactivated records **10**
DOCTYPE element **24**
duplicate threshold **13**

E

EDM reports
  configuring **16**, **17**
  running **18**
EDM search reports
  running **20**
eIndexPersonReport.xml **11**, **23**
enable element **18**, **25**
Enterprise Data Manager file **16**
Enterprise Designer **22**
environment variables **23**
ePath **27**
eViewCompanyReport.xml **11**, **23**

F

field element **27**
field-ref element **18**
fields element **18**, **27**
From Date search field **19**
from-date attribute **26**

J

Java command **28**
Java Runtime Environment **6**, **10**, **23**
JRE
  see Java Runtime Environment

L

label attribute **27**

M

MasterController **11**
matching threshold **10**, **11**, **12**, **13**
max-result-size element **18**, **26**
merge transaction report
  about **13**
  fields **13**, **35**, **55**
  sample **56**
merge transactions **10**
monthly activity report **11**
  about **14**
  fields **14**, **43**, **63**
  sample **44**, **64**

N

name attribute **18**
name element **25**

O

Object Definition file **13**
Oracle **8**

output-file element **26**
output-folder element **24**

P

page-size element **18, 26**
path attribute **27**
PL/SQL **6, 10, 11**
potential duplicate report
    about **13**
    fields **13, 31, 51**
    sample **32, 52**
potential duplicates **10, 11, 12, 13**
production reports
    about **10, 12**

R

report
    update **39, 59**
report client **6**
report element **17, 25**
report search fields **19**
report.dtd **24**
ReportClient.bat **27**
reports
    assumed match **12, 29, 49**
    command line, configuring **22**
    configuring **11, 23, 24**
    custom **11**
    date ranges **12**
    deactivated record **13, 33, 53**
    EDM, configuring **16, 17**
    EDM, running **18**
    environment variables for **23**
    fields **12**
    installing **22**
    merge transaction **13, 35, 55**
    monthly activity **14, 43, 63**
    potential duplicate **13, 31, 51**
    running with the batch file **27**
    running with the Java command **28**
    unmerge transaction **13, 37, 57**
    update **14**
    weekly activity **14, 41, 61**
    yearly activity **15, 45, 65**
root-object element **17**
running reports
    with the batch file **27**
    with the Java command **28**

S

same system matching **13**
screenshots **8**
search reports
    EDM, running **20**
search result reports **47**
search-page-field-per-row element **17**
status element **27**
Status search field **20**
stc_eindex_client.jar **22**
stc_eindex_util.jar **22**
SYSTEM element **24**

T

tab-entrance element **17**
tab-name element **17**
template element **25**
title attribute **18**
To Date search field **19**
to-date attribute **26**
type attribute **26**

U

unmerge transaction report
    about **13**
    fields **13, 37, 57**
    sample **38, 58**
unmerge transactions **10**
update report
    about **14**
    fields **14, 39, 59**
    sample **40, 60**
updates **10**

W

weekly activity report **11**
    about **14**
    fields **14, 41, 61**
    sample **42, 62**
width attribute **27**

Y

yearly activity report **11**
    about **15**
    fields **15, 45, 65**
    sample **46, 66**