Oracle® Healthcare Master Person Index

Relationship Management Data Manager User's Guide

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Oracle Healthcare Master Person Index Relationship Management Data Manager User's Guide, Release 4.0

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Contents

1 Understanding Relationship Management Data Manager

2 Accessing Relationship Management Data Manager

3 Working with Entity Types

4 Working with Relationship Types

5 Working with Master Person Index Domains

6 Working with Rulesets and Tasks

7   Working with View Relationship

Preface

This document provides conceptual information and procedures for managing Oracle Healthcare Master Person Index (OHMPI) Relationship Management (RM) applications using the web-based Relationship Management Data Manager (RMDM) and is accessed through an internet browser.

Audience

This document is intended for users who manage their OHMPI RM applications and projects using RMDM.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Related Documents

For more information and instructions for implementing and using a master person index application, see the following documents in the Oracle Healthcare Master Person Index documentation set:

- *Oracle Healthcare Master Person Index Analyzing and Cleansing Data User's Guide*

- *Oracle Healthcare Master Person Index Australia Patient Solution User's Guide*

- *Oracle Healthcare Master Person Index Command Line Reports and Database Management User's Guide*

- *Oracle Healthcare Master Person Index Configuration Guide*

- *Oracle Healthcare Master Person Index Configuration Reference*

- *Oracle Healthcare Master Person Index Data Manager User's Guide*

- *Oracle Healthcare Master Person Index Installation Guide*

- *Oracle Healthcare Master Person Index Loading the Initial Data Set User's Guide*

- *Oracle Healthcare Master Person Index Match Engine Reference*

- *Oracle Healthcare Master Person Index Message Processing Reference*

- *Oracle Healthcare Master Person Index Provider Index User's Guide*

- *Oracle Healthcare Master Person Index Real-time Loader User's Guide*

- *Oracle Healthcare Master Person Index Relationship Management Data Manager User's Guide*

- *Oracle Healthcare Master Person Index Relationship Management REST APIs Reference Guide*

- *Oracle Healthcare Master Person Index Relationship Management User's Guide*

- *Oracle Healthcare Master Person Index Release Notes*

- *Oracle Healthcare Master Person Index Security Guide*

- *Oracle Healthcare Master Person Index Standardization Engine Reference*

- *Oracle Healthcare Master Person Index Third Party Licenses and Notices*

- *Oracle Healthcare Master Person Index United Kingdom Patient Solution User's Guide*

- *Oracle Healthcare Master Person Index United States Patient Solution User's Guide*

- *Oracle Healthcare Master Person Index User's Guide*

- *Oracle Healthcare Master Person Index Working With HPD Profile Application User's Guide*

- *Oracle Healthcare Master Person Index Working With IHE Profiles User's Guide*

> **Note:** These documents are designed to be used together when implementing a master index application.

Finding Information and Patches on My Oracle Support

Your source for the latest information about Oracle Healthcare Master Person Index is Oracle Support's self-service Web site My Oracle Support (formerly MetaLink).

Before you install and use Oracle Healthcare Master Person Index, always visit the My Oracle Support Web site for the latest information, including alerts, White Papers, installation verification (smoke) tests, bulletins, and patches.

Creating a My Oracle Support Account

You must register at My Oracle Support to obtain a user name and password account before you can enter the Web site.

To register for My Oracle Support:

1. Open a Web browser to https://support.oracle.com.

2. Click the **Register here** link to create a My Oracle Support account. The registration page opens.

3. Follow the instructions on the registration page.

Signing In to My Oracle Support

To sign in to My Oracle Support:

1. Open a Web browser to https://support.oracle.com.

2. Click **Sign In.**

3. Enter your user name and password.

4. Click **Go** to open the My Oracle Support home page.

Finding Information on My Oracle Support

There are many ways to find information on My Oracle Support.

Searching by Article ID

The fastest way to search for information, including alerts, White Papers, installation verification (smoke) tests, and bulletins is by the article ID number, if you know it.

To search by article ID:

1. Sign in to My Oracle Support at https://support.oracle.com.

2. Locate the Search box in the upper right corner of the My Oracle Support page.

3. Click the sources icon to the left of the search box, and then select **Article ID** from the list.

4. Enter the article ID number in the text box.

5. Click the magnifying glass icon to the right of the search box (or press the Enter key) to execute your search.

    The Knowledge page displays the results of your search. If the article is found, click the link to view the abstract, text, attachments, and related products.

Searching by Product and Topic

You can use the following My Oracle Support tools to browse and search the knowledge base:

■   Product Focus — On the Knowledge page under Select Product, type part of the product name and the system immediately filters the product list by the letters you have typed. (You do not need to type "Oracle.") Select the product you want from the filtered list and then use other search or browse tools to find the information you need.

■   Advanced Search — You can specify one or more search criteria, such as source, exact phrase, and related product, to find information. This option is available from the **Advanced** link on almost all pages.

Finding Patches on My Oracle Support

Be sure to check My Oracle Support for the latest patches, if any, for your product. You can search for patches by patch ID or number, or by product or family.

To locate and download a patch:

1. Sign in to My Oracle Support at https://support.oracle.com.

2. Click the **Patches & Updates** tab. The Patches & Updates page opens and displays the Patch Search region. You have the following options:

    ■   In the **Patch ID or Number is** field, enter the number of the patch you want. (This number is the same as the primary bug number fixed by the patch.) This option is useful if you already know the patch number.

    ■   To find a patch by product name, release, and platform, click the **Product or Family** link to enter one or more search criteria.

3. Click **Search** to execute your query. The Patch Search Results page opens.

4. Click the patch ID number. The system displays details about the patch. In addition, you can view the Read Me file before downloading the patch.

5. Click **Download.** Follow the instructions on the screen to download, save, and install the patch files.

Finding Oracle Documentation

The Oracle Web site contains links to all Oracle user and reference documentation. You can view or download a single document or an entire product library.

Finding Oracle Health Sciences Documentation

To get user documentation for Oracle Health Sciences applications, go to the Oracle Health Sciences documentation page at:

http://www.oracle.com/technetwork/documentation/hsgbu-154445.html

> **Note:** Always check the Oracle Health Sciences Documentation page to ensure you have the latest updates to the documentation.

Finding Other Oracle Documentation

To get user documentation for other Oracle products:

1. Go to the following Web page:

   http://www.oracle.com/technology/documentation/index.html

   Alternatively, you can go to http://www.oracle.com, point to the Support tab, and then click **Documentation.**

2. Scroll to the product you need and click the link.

3. Click the link for the documentation you need.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Understanding Relationship Management Data Manager

Relationship Management Data Manager (RMDM) is web user interface targeted towards data stewards to boot strap and manage Relationship Management metadata. This web user interface uses the same REST APIs which are also available to end user applications. User belonging to one of the RmAnalyst, RmAdministrator, or RmIntegrator role can access RMDM.

User with role of RmAnalyst will have read-only access whereas users with RmAdministrator or RmIntegrator can create, read, and update operations.

Using Relationship Management Data Manager, data stewards can perform the following:

- Create, update, activate, and deactivate entity types
- Create, update, activate, and deactivate relationship types
- Create and update domains
- Create, update, activate, and deactivate rulesets and tasks
- Search entities and view relationships for entities

2

Accessing Relationship Management Data Manager

1. Enter the following URL in the supported web browser:

   > **Note:** This URL is configured while creating the OHMPI Relationship Management project. For information, see *Oracle Healthcare Master Person Index Relationship Management User's Guide*.

   ```
   http://<Server>:<Port>/ohmpi-rm-ui/1.0.0/
   ```

   For information on the supported browsers, see *Oracle Healthcare Master Person Index Installation Guide*.

2. Enter the user name and password provided by your system administrator.

3. Click **Sign In**.

   The OHMPI Relationship Management Console appears with the Home tab selected.

3

Working with Entity Types

A user with the RmAdministrator or RmIntegrator role can create, edit, activate, and deactivate an entity type.

1. On the OHMPI Relationship Management Console, click the **Entity Types** tab.

2. To create an entity type, see Section 3.1, "Creating an Entity Type".

3. To edit an entity type, see Section 3.2, "Editing an Entity Type".

4. To activate or deactivate an entity type, see Section 3.3, "Activating or Deactivating an Entity Type".

A user with the RmAnalyst role can only view the entity type details.

1. On the OHMPI Relationship Management Console, click the **Entity Types** tab.

2. Select the check box against the entity type and click **View**.

   The details of the entity type appear.

3. Click **OK**.

3.1 Creating an Entity Type

1. Click **Create**.

   The Create New Entity Type dialog box appears.

2. Enter the entity type name, ID type, and the description of the entity type.

3. To add a custom attribute of entity type, click **Add** in the Custom Attribute Types section.

   The Create New Custom Attribute Type dialog box appears.

4. Enter the values, as required.

   For information on the fields, see *Oracle Healthcare Master Person Index Relationship Management REST APIs Reference Guide*.

5. Click **Add**.

   The new custom attribute appears in the list of Custom Attribute Types.

6. To edit a custom attribute:

   a. Select the check box against the attribute that you want to edit and click **Edit**.

      The Edit Custom Attribute Type dialog box appears.

      b. Edit the values, as required.

      c. Click **Update**.

7. To delete a custom attribute:

      a. Select the check box against the attribute that you want to delete and click **Delete**.

      The Delete Confirmation dialog box appears.

      b. Click **OK**.

8. Click **Create**.

    The entity type is created and appears in the list of entity types.

3.2 Editing an Entity Type

1. Select the check box against the entity type that you want to edit and click **Edit**.

    The Edit Entity Type dialog box appears.

2. Edit the ID type or description, as required.

    You can also add, edit, activate, or deactivate the custom attribute of the entity type.

    To add a custom attribute of entity type:

      a. Click **Add** in the Custom Attribute Types section.

      The Create New Custom Attribute Type dialog box appears.

      b. Enter the values, as required.

      For information on the fields, see *Oracle Healthcare Master Person Index Relationship Management REST APIs Reference Guide*.

      c. Click **Add**.

      The new custom attribute appears in the list of Custom Attribute Types.

    To edit a custom attribute of entity type:

      a. Select the check box against the attribute that you want to edit and click **Edit**.

      The Edit Custom Attribute Type dialog box appears.

      b. Edit the values, as required.

      c. Click **Update**.

    To activate or deactivate a custom attribute of entity type:

      a. Select the check box against the attribute and click **Activate** or **Deactivate**.

      b. Click **OK**.

3. Click **Update**.

3.3 Activating or Deactivating an Entity Type

1. Select the check box against the entity type and click **Activate** or **Deactivate**.

2. Click **OK**.

4

Working with Relationship Types

A user with the RmAdministrator or RmIntegrator role can create, edit, activate, and deactivate a relationship type.

1. On the OHMPI Relationship Management Console, click the **Relationship Types** tab.

2. To create a relationship type, see Section 4.1, "Creating a Relationship Type".

3. To edit a relationship type, see Section 4.2, "Editing a Relationship Type".

4. To activate or deactivate a relationship type, see Section 4.3, "Activating or Deactivating a Relationship Type".

A user with the RmAnalyst role can only view the entity type details.

1. On the OHMPI Relationship Management Console, click the **Relationship Types** tab.

2. Select the check box against the relationship type and click **View**.

   The details of the relationship type appear.

3. Click **OK**.

4.1 Creating a Relationship Type

1. Click **Create**.

   The Create New Relationship Type dialog box appears.

2. Enter the values, as required.

   For information on the fields, see *Oracle Healthcare Master Person Index Relationship Management REST APIs Reference Guide*.

3. To add a custom attribute of relationship type, click **Add** in the Custom Attribute Types section.

   The Create New Custom Attribute dialog box appears.

4. Enter the values, as required.

   For information on the fields, see *Oracle Healthcare Master Person Index Relationship Management REST APIs Reference Guide*.

5. Click **Add**.

   The new custom attribute appears in the list of Custom Attribute Types.

6. To edit a custom attribute:

   a. Select the check box against the attribute that you want to edit and click **Edit**.

      The Edit Custom Attribute dialog box appears.

   b. Edit the values, as required.

   c. Click **Update**.

7. To delete a custom attribute:

   a. Select the check box against the attribute that you want to delete and click **Delete**.

      The Delete Confirmation dialog box appears.

   b. Click **OK**.

8. Click **Create**.

   The relationship type is created and appears in the list of relationship types.

4.2 Editing a Relationship Type

1. Select the check box against the relationship type that you want to edit and click **Edit**.

   The Edit Relationship Type dialog box appears.

2. Edit the values, as required.

   You can also add, edit, activate, or deactivate the custom attribute of the relationship type.

   To add a custom attribute of relationship type:

   a. Click **Add** in the Custom Attribute Types section.

      The Create New Custom Attribute dialog box appears.

   b. Enter the values, as required.

      For information on the fields, see *Oracle Healthcare Master Person Index Relationship Management REST APIs Reference Guide*.

   c. Click **Add**.

      The new custom attribute appears in the list of Custom Attribute Types.

   To edit a custom attribute of relationship type:

   a. Select the check box against the attribute that you want to edit and click **Edit**.

      The Edit Custom Attribute dialog box appears.

   b. Edit the values, as required.

   c. Click **Update**.

   To activate or deactivate a custom attribute of entity type:

   a. Select the check box against the attribute and click **Activate** or **Deactivate**.

   b. Click **OK**.

3. Click **Update**.

4.3 Activating or Deactivating a Relationship Type

1. Select the check box against the relationship type and click **Activate** or **Deactivate**.

2. Click **OK**.

5

Working with Master Person Index Domains

A user with the RmAdministrator or RmIntegrator role can create or edit an MPI domain.

1. On the OHMPI Relationship Management Console, click the **MPI Domains** tab.

2. To create an MPI domain, see Section 5.1, "Creating Master Person Index Domain".

3. To edit an MPI domain configuration, see Section 5.2, "Editing Master Person Index Domain Configuration".

A user with the RmAnalyst role can only view the MPI domain configuration.

1. On the OHMPI Relationship Management Console, click the **MPI Domains** tab.

2. Select the check box against the MPI domain and click **View**.

   The MPI domain configuration appears.

3. Click **OK**.

5.1 Creating Master Person Index Domain

1. Click **Create**.

   The Create New Domain dialog box appears.

2. Enter the values, as required.

   Note:

   - The domain name must match with the MPI root object name and entity type name to be created.

   - The user ID, password, URL, and JNDI name are used to access MPI EJBs.

   For information on the fields, see *Oracle Healthcare Master Person Index Relationship Management REST APIs Reference Guide*.

3. Click **Create**.

   The MPI domain is created and appears in the list.

5.2 Editing Master Person Index Domain Configuration

1. Select the check box against the MPI domain that you want to edit and click **Edit**.

   The Edit Domain dialog box appears.

2. Edit the values, as required.

3. Click **Update**.

6

Working with Rulesets and Tasks

A user with the RmAdministrator or RmIntegrator role can create, edit, activate, and deactivate rulesets and tasks.

1. On the OHMPI Relationship Management Console, click the **Rulesets and Tasks** tab.

2. To create, edit, activate, or deactivate rulesets, see Section 6.1, "Working with Rulesets".

3. To create, edit, activate, or deactivate tasks, see Section 6.2, "Working with Tasks".

A user with the RmAnalyst role can only view the ruleset and task details.

1. On the OHMPI Relationship Management Console, click the **Rulesets and Tasks** tab.

2. To view the details of a ruleset, select the check box against the ruleset in the Ruleset section and click **View**.

   The details of the ruleset appear.

3. To view the details of a task, select the check box against the task in the Tasks section and click **View**.

   The details of the task appear.

6.1 Working with Rulesets

> **Note:** Only one ruleset per source and target EntityType is supported.

1. To create a ruleset, see Section 6.1.1, "Creating a Ruleset".

2. To edit a ruleset, see Section 6.1.2, "Editing a Ruleset".

3. To activate or deactivate a ruleset, see Section 6.1.3, "Activating or Deactivating a Ruleset".

6.1.1 Creating a Ruleset

1. Click **Create** in the Ruleset section.

   The Create New Ruleset dialog box appears.

2. Enter the values, as required.

For information on the fields, see *Oracle Healthcare Master Person Index Relationship Management REST APIs Reference Guide*.

3. Click **Create**.

The ruleset is created.

6.1.2 Editing a Ruleset

1. Select the check box against the ruleset that you want to edit in the Ruleset section and click **Edit**.

The Edit Ruleset dialog box appears.

2. Edit the values, as required.

3. Click **Update**.

6.1.3 Activating or Deactivating a Ruleset

1. Select the check box against the ruleset in the Ruleset section and click **Activate** or **Deactivate**.

2. Click **OK**.

6.2 Working with Tasks

1. To create a task, see Section 6.2.1, "Creating a Task".

2. To edit a task, see Section 6.2.2, "Editing a Task".

3. To activate or deactivate a task, see Section 6.2.3, "Activating or Deactivating a Task".

6.2.1 Creating a Task

1. Click **Create** in the Tasks section.

The Create New Task dialog box appears.

2. Enter the values, as required.

For information on the fields, see *Oracle Healthcare Master Person Index Relationship Management REST APIs Reference Guide*.

3. Click **Create**.

The task is created.

6.2.2 Editing a Task

1. Select the check box against the task that you want to edit in the Tasks section and click **Edit**.

The Edit Task dialog box appears.

2. Edit the values, as required.

3. Click **Update**.

6.2.3 Activating or Deactivating a Task

1. Select the check box against the task in the Tasks section and click **Activate** or **Deactivate**.

2. Click **OK**.

7

Working with View Relationship

A user with the RmAdministrator, RmIntegrator, or RmAnalyst role can search for entities, view relationships for an entity, and view their attributes.

A user with the RmAdministrator or RmIntegrator role can also update the relationship attributes, such as status, validity, effective date, and expiration date.

7.1 Searching an Entity

1. On the OHMPI Relationship Management Console, click the **View Relationship** tab.

2. Click **Entity-based Relationship Search**.

   The Entity-based Relationship Search dialog box appears.

3. Select an entity from the **Entity Type** drop-down list.

4. Enter values for the other entity attributes criteria.

5. Click **Search**.

   The list of entities appears based on the entity attribute search criteria.

6. Select an entity from the list for which you want to view the relationship.

7. Click **View Relationships**.

   The list of relationships for the selected entity appears in the Table View tab. You can also view the relationships in the Graph View tab.

8. To filter the search result for relationships, set the filter criteria on the left panel of the list of relationships.

   You can filter the search result for relationships based on the following:

   - Relationship Types
   - Status
   - Validity
   - Created Date
   - Expired Date

7.2 Viewing Relationships in Table View

By default, the list of relationships is displayed in tabular form, with pagination support, in the Table View tab. Pagination is based on the number of relationships in the search result.

Clicking on the source summary or target summary of a relationship displays the source or target attribute values on the right panel. Clicking elsewhere on the row, other than source summary or target summary, displays the relationship attribute values on the right panel.

A user with the RmAdministrator or RmIntegrator role can update the effective date, expiration date, validity, and status (active or inactive) of the relationship.

To update the relationship attribute value:

1. In the list of relationships, click on the relationship row for which you want to update the attribute value.

   > **Note:** Make sure you do not click on source summary or target summary of a relationship.

   The relationship attribute values appear on the right panel.

2. Modify the attribute values, as required.

   > **Note:** To update the status of relationship, you can also click **Activate** or **Deactivate**.

3. Click **Update**.

7.3 Viewing Relationships in Graph View

To view the relationships in graphical form, click the **Graph View** tab. In graphical view, the searched entity is displayed at the center of the graph and other related entities around it. Pagination in the graphical view is based on the number of related entities present in the search result as all the relationship between searched entity and related entities are displayed in the same page.

Each arrow represents a relationship between the two entities. Clicking on the entity node displays its properties on the right panel and clicking on an arrow displays the relationship attribute values on the right panel.

A user with the RmAdministrator or RmIntegrator role can update the effective date, expiration date, validity, and status (active or inactive) of the relationship.

To update the relationship attribute value:

1. Click on the arrow connecting the entities for which you want to update the relationship attribute value.

   > **Note:** Make sure you do not click on the entity node.

   The relationship attribute values appear on the right panel.

2. Modify the attribute values, as required.

> **Note:** To update the status of relationship, you can also click **Activate** or **Deactivate**.

3. Click **Update**.

7.3.1 Navigating Relationships in Graph View

To navigate from one entity relationship view to another, double-click on the entity node for which you want to view the relationship.