IBM InfoSphere Master Data Management

IBM InfoSphere MDM Web Reports User's Guide

Version 11 Release 3

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Note

Before using this information and the product that it supports, read the information in "Notices and trademarks" on page 21.

Edition Notice

This edition applies to version 11.3 of IBM InfoSphere Master Data Management and to all subsequent releases and modifications until otherwise indicated in new editions.

Contents

Chapter 1. InfoSphere MDM Web Reports Basics

InfoSphere® MDM Web Reports is an end-user application that enables you to create reports and perform data analysis. When a report is requested through this application, the information is passed from the operational server.

InfoSphere MDM Web Reports terms and concepts

These terms and concepts help you in understanding InfoSphere MDM Web Reports.

Linkages

A linkage is two or more records that are associated by a common Enterprise ID.

Linkage status

The label that is assigned to a linkage set, which tracks user review. The status types can be customized, but usually include **Examined OK** (linkage was reviewed and confirmed) and **Examined Error** (linkage was reviewed and an error in the linkage is confirmed).

Entity

An entity is the logical relationship between two or more member records. Entities are represented in the software environment as records that share an Enterprise ID. An entity is also called a linkage set. There can be an unlimited number of records in an entity or linkage set.

Tasks

Unit of work, created by the software, which facilitates user review, and possibly resolution.

Task type

Task types that are identified by the software consist of:

- Potential Duplicate - records that exist in same source system that have a high potential of being the same member. These records may share much of the same demographic information, but have different Source ID numbers. An example of how a potential duplicate can occur is when a person previously entered in a source system has returned to your organization for more service. However, an attempt to locate the original record in the source system that failed and a second record was entered resulting in multiple records for one individual.
- Potential Linkage - records that exist in different source systems that have a high potential of being the same person. For example, Joe Smith was entered into Source System A as `Joe Smith`, Source System B as `J. Smith`, and Source System C as `Joseph Smith`. To resolve this issue and show that they are the same person, a common Enterprise ID would be assigned to the records.
- Potential Overlay - an incorrect association of one person's data with another person's data in the same source. For example, if two different individuals are incorrectly sharing the Source ID, one person's data could potentially overwrite

the other. Potential overlay tasks are assigned negative scores, as it reflects the differences within the data as opposed to the similarities. A high negative score signals that the most current information likely does not belong to the original person associated with the Source ID.
- Review Identifier - records within the same source that incorrectly share unique identifying information, such as a Social Security number.

Task status

Indicates where the task currently stands in the workflow process. For example, if a task has not yet been reviewed, the status could be Unexamined. If a user begins to work a task and determines that more information is required to make an accurate decision, the task status might be changed to Deferred. Task status types can be customized to accommodate the organization's needs.

Source

A separate system/database with which the software interacts and receives member information and updates.

Event

A transaction that triggers a change to a member in the database.

Member

A member is defined as a set of demographic information that represents one individual (such as a person or organization) or object (such as a car or machine part). A member object is the representation of what a single source system asserts to be true about an individual or thing. In the healthcare environment, a member is a person that is known in the Master Person Index (MPI) of the database.

The term member is also used in the documentation as another synonym for an individual or object that is known in the database.

Auto-unlink

A previously auto-linked record that, because of new information, no longer compares above the auto-link threshold with another record and has been automatically unlinked by the software.

Single source Auto-link (Autolink-SS)

Indicates records that are compared from the same source, which scored above the auto-link threshold. A common Enterprise ID is assigned by the software.

Multi-source Auto-link (Autolink-MS)

Indicates records that are compared from multiple sources, which scored above the auto-link threshold. A common Enterprise ID is assigned by the software.

Single source Manual link (Manulink-SS)

Indicates an InfoSphere MDM Inspector user manually linked records from a single source.

Multi-source Manual link (Manulink-MS)

Indicates an InfoSphere MDM Inspector user manually linked records from multiple sources.

Linkage types

This is the label that is assigned to a linkage set associated when an Enterprise ID assignment is made by the software or by a user.

Using the InfoSphere MDM Web Reports viewer

The viewer runs in a browser, powered by a web application server.

Viewing a Web Report

Within InfoSphere MDM Web Reports, you can view Inspector, Operational, and Workbench reports.

Follow this procedure to view reports.

1. Select a report to view using either of these two methods:
   - Click the report's hyperlinked title on the Reports Home page.
   - Click the navigation buttons at the top of the screen and select the report that you want.
2. Select the parameters for the report data. For an explanation of the parameters and result fields, view the help page for the individual report you are running.
   - To select a date, click the calendar icon. Use the up and down icons to cycle backward and forward through the months. Alternatively, you can type the date in the date fields.
   - To select a time, select the clock icon. Click the hour, minute, and AM/PM/any values as needed. Alternatively, you can type the time in the time fields.
   - To clear the date and time, click **Clear**.

     Some reports enable you to filter on multiple values for a particular parameter, such as Sources.
   - To include values, select one or more values from the **Available** list box and click **Add >>** to move it to the **Selected** list box.
   - To remove values, select one or more values in the **Selected** list box and click **<< Remove** to move it to the **Available** list box.

     In some cases, selecting nothing is not a valid option; if you do not explicitly choose a value, the default setting is to return all values for the parameter.
3. Click **Search** to run the report. The screen is refreshed and report data is displayed. A summary of the selected search criteria is shown in the results table.
4. If you must adjust the search parameters, click **View** or modify search parameters link, and alter the values. Click **Search** to refresh the report with the updated values.

Saving Web Report data to a file

For each report, you have the option of saving the data to a text file in CSV (comma-separated values) format, enabling you to easily import it into another program, such as a spreadsheet. You can do this when you initially run the report or after you have viewed the data on-screen.

1. To save the output to a file, select the option to download results as a CSV file on the report's parameter selection screen. If you have already viewed the results on-screen, click the Modify search parameters link to open the parameter selection window.
2. To use a character other than a comma as the separator, type a different character in the **CSV separator character** field.
3. Click the Search button. A browser-specific download dialog opens.
4. Use your browser's usual method to save the file to the desired location. The buttons and options vary depending on the browser you are using.

Chapter 2. InfoSphere MDM Inspector Reports

These reports are designed to give the end user a view into the operational server with regard to tasks and events.

Duplication Summary Statistics Report

This InfoSphere MDM Inspector report displays information about the number of Potential Duplicate tasks that are created and resolved over time. The report provides percentages for error rates, and can help you gauge the health of your source data, in terms of rates of data duplication.

Parameters for Duplication Summary Statistics report

`Entity Type`
select the type of entity for this report. Entity types are customizable for each installation.

`From`
select the beginning of the date range during which the event was created.

`Source Names`
select the source(s) of the member record(s) for which you wish to review events. The default is all source names.

`Download results as CSV file`
if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report will not be displayed in the default browser format when this option is checked.

Report fields

Unless otherwise defined, the Total row is a summation of all the columns above it.

- Number of Records: The number of records for the given source(s) and date range.
- Number of Entities: The number of unique entities across the given source(s) and date range. The Total row shows the number of unique entities across all the sources.
- Remaining Tasks: The number of Potential Duplicate tasks for the given source(s).
- Remaining Task Sets: The number of Potential Duplicate tasks for the given source(s) that are in a task set. The Total row shows the number of unique Potential Duplicate tasks sets across all the sources.
- Remaining Record Error Rate: The Remaining Tasks divided by the Number of Records displayed as a percentage.
- Remaining Task Set Entity Error Rate: The Remaining Task Sets divided by the Number of Entities displayed as a percentage.
- Resolved Records: The number of Potential Duplicate tasks that have been resolved for the given source(s).
- Record Error Rate: The sum of Remaining Tasks + Resolved Records divided by the Number of Records displayed as a percentage.

- Entity Error Rate: The sum of Remaining Tasks + Resolved Records divided by the Number of Entities displayed as a percentage
- Task Set Entity Error Rate: The sum of Remaining Task Sets + Resolved Records divided by the Number of Entities displayed as a percentage.

Event Activity Report

This InfoSphere MDM Inspector report provides details the cause of task creation. It tracks the transaction initiator information that is associated with the creation of task records, and allows users to determine business process improvements for registration process. The report identifies tasks that must be resolved.

Parameters

- Entity Type – select the type of entity for this report. Entity types are customizable for each installation.
- From – select the beginning of the date range during which the event was created.
- To – select the end of the date range during which the event was created.
- Event Types – select the type of event or records that are received in messages (HL7, XML, and so on). For example, A01 might represent Patient Admit, and A30 might represent Merge Patient. Event types are customizable and specific to the industry in which the software is being used. The default is all defined event types.
- Source Names – select the source(s) of the member record(s) for which you want to review events. The default is all source names.
- Include events that are initiated by user – type the log-in names (comma-separated) of events you want to see which were initiated by specific users.
- Download results as CSV file – if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report is not displayed in the default browser format when this option is checked.

Report fields

- Source – describes the source name for the event record.
- Event Initiator – represents the user who initiated the event.
- Event Type – describes the type of event that took place.
- Task Type – for each type of task that took place, displays the number of those tasks by initiator.
- Total - the total number of tasks that took place.

Event Detail Report

This InfoSphere MDM Inspector report displays information about tasks that were created by an event and resolved either manually or via an event. The task records displayed are only those that have been reviewed and resolved; the report does not reflect autolinkages.

Parameters

- Entity Type – select the type of entity for this report. Entity types are customizable for each installation.

- From – select the beginning of the date range during which the event was created.
- To – select the end of the date range during which the event was created.
- Event Types – select the type of event or records that are received in messages (HL7, XML, and so on). For example, A01 might represent Patient Admit, and A30 might represent Merge Patient. Event types are customizable and specific to the industry in which the software is being used. The default is all defined event types.
- Source Names – select the sources of the member records for which you want to review events. The default is all source names.
- Include events that are initiated by user – type the log-in names (comma-separated) of events you want to see which were initiated by specific users.
- Maximum number of events to display – select a value for the maximum number of events to display.
- Download results as CSV file – if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report is not displayed in the default browser format when this option is checked.

Report fields

- Event Initiator – represents the user who initiated the event.
- Event Type – describes the type of event that took place.
- Task Type – describes the type of task that took place.
- Score – describes the score or ranking of the event.
- Record ID – describes the source/member information that is related to the event.
- Surviving Record ID – describes the surviving source/member information that is related to the event.
- Member Name – describes the legal name of the member.
- Sex – describes the member's gender.
- Date of Birth – describes the member's date of birth.
- Phone – describes the member's telephone number.
- Resolution Date – describes when the event was resolved.

Event Summary Report

This InfoSphere MDM Inspector report displays information about tasks that were created by an event and resolved either manually or via an event. The task records displayed are only those that have been reviewed and resolved.

This report can help you track workload, or identify data sources that are creating a significant number of duplicates.

Parameters

- Entity Type – select the type of entity for this report. Entity types are customizable for each installation.
- From – select the beginning of the date range during which the event was created.
- To – select the end of the date range during which the event was created.

- Event Types – select the type of event for records that are received in messages (HL7, XML, and so on). For example, A01 might represent Patient Admit, and A30 might represent Merge Patient. Event types are customizable and specific to the industry in which the software is being used. The default is all defined event types.
- Source Names – select the sources of the member records for which you want to review events. The default is all source names.
- Download results as CSV file – if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report is not displayed in the default browser format when this option is checked.

Report fields

- Source – describes the source name for the event record.
- Event Initiator – represents the user who initiated the event.
- Event Type – describes the type of event that took place.
- Task Type – for each type of task that took place, displays the number of those tasks by initiator.
- Total - the total number of tasks that took place.

Linkage Management Overview

This InfoSphere MDM Inspector report provides information about the number and kinds of linkages that are being created, and can also be used to account for the resolution of linkages.

Parameters

- Entity Type – select the type of entity for this report. Entity types are customizable for each installation.
- Filter Type – choose whether to filter the report data based on creation date and time, or last modified date and time.
- From – select the beginning of the date range during which the status of the record was changed or created. Use the calendar icon to select a date and the clock icon to select a time.
- To – select the end of the date range during which the status of the record was changed or created. Use the calendar icon to select a date and the clock icon to select a time.
- Source Names – select the source of the member record number to which the linkage is related. The default is all source names.
- Linkage Types – select the types of linkages to view for this report. Typical Linkage Types include Single Source Auto-link (Autolink-SS), Multi-Source Auto-link (Autolink-MS), Auto-unlink, Single Source Manual Link (Manulink-SS), Multi-Source Manual Link (Manulink-MS), and so on.
- Download results as CSV file – if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report will not be displayed in the default browser format when this option is checked.

Report fields

- Linkage Type – describes the linkage type that is found in the operational server that matches the selected parameters.

- Linkage Status – describes the linkage status that is found in the operational server that matches the selected parameters.
- [Source Names] – displays each of the Sources that are selected on the parameters page.
- Total Number – total number of each linkage type across Sources.

Notes Detail Report

This InfoSphere MDM Inspector report allows users to review notes that are associated with a particular record and for notes that are created within a time frame.

Parameters

- Entity Type – select the type of entity for this report. Entity types are customizable for each installation.
- Filter Type – choose whether to filter the report data based on the date and time the note was created or last modified.
- From – select the beginning of the date range during which the task was created or modified.
- To – select the end of the date range during which the task was created or modified.
- Filter notes by the following EID range – select the start (from) and end (to) Enterprise IDs on which to filter the data.
- Source Names – select the source(s) of the member record(s) for which you want to review tasks. The default is all source names.
- Include notes that are created by users – type the log-in names (comma-separated) of notes you want to see which were created by specific users.
- Maximum number of trigger members to display – select the maximum number of rows to display in the result set. The default is 100.
- Download results as CSV file – if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report will not be displayed in the default browser format when this option is checked.

Report fields

- Enterprise ID – the enterprise identifier for the member record involved.
- Source:ID – describes the source identifier and member identification number.
- Note – describes the verbiage of the note.
- Created – describes the note creation date.
- User – describes the user who transcribed the note.

Pre-Merge Report

The task type for this InfoSphere MDM Inspector report must be PREMERGE in order for results to appear. A PREMERGE status results when a Potential Duplicate task is resolved in the operational server. In other words, this resolved task is waiting for a confirmation from the source system to complete the merge (have the records share their MEMIDNUM).

Parameters

This information in this report is useful for determining if manual processing must be performed, or if a processing error must be corrected.

- Entity Type – select the type of entity for this report. Entity types are customizable for each installation.
- From – select the beginning of the date and time range during which the task was created.
- To – select the end of the date and time range during which the task was created.
- Source Names – select the data source(s) to which tasks are associated. The default is all sources.
- Maximum number of pre-merges to display – select the maximum number of rows to display in the result set. The default is 1000.
- Download results as CSV file – if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report will not be displayed in the default browser format when this option is checked.

Report fields

- Current Source ID – describes the latest source identifier in the format Source:Source ID.
- Surviving Source ID – describes the surviving source identifier in the format Source:Source ID.
- Attribute Name – describes the name of the attribute that is affected by the task.
- Attribute Value – describes the value for the attribute that is affected by the task.
- Record Status – corresponds to the value of TGTSTATUS in the stdenv.ksh file which configures the extract. This report is configured to display only Active (A) attributes by default.
- Created – describes the date that the task was created.
- Last Modified – describes the date that the task was last updated.

Record Resolution Detail Report

This InfoSphere MDM Inspector report displays details about the entities that are established, reviewed, or resolved during the selected time frame.

Parameters

Entity Type
: select the type of entity for this report. Entity types are customizable for each installation.

Filter linkages by the following date and time
: choose whether to filter the report data based on Create Time or Last Modified Time.
  - From – select the beginning of the date range and time during which the linkage was created.
  - To – select the end of the date range and time during which the linkage was created.

Filter linkages by the following EID range
: select the start (from) and end (to) Enterprise IDs on which to filter the data.

Include Linkage Types
select the linkage types to display in the report. The default is all linkage types.

Include Linkage Statuses
select the task statuses to display in the report. The default is all task statuses.

Include Users
select users to see events that are initiated by those users. The default is all users.

Maximum number of trigger members to display
select the maximum number of rows to display in the result set. The default is 1000.

Download results as CSV file
if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report is not displayed in the default browser format when this option is checked.

Report fields

- Enterprise ID – describes the enterprise identifier.
- Prior EID – describes the prior enterprise ID for the member that is affected by the task.
- Workflow Status – describes the status of the task.
- Linkage Type – describes the type of linkage for this record.
- Creation Time – describes the date that the task was created.
- Last Modification Time – describes the date that the task was last updated.
- User – describes the user who last updated the task.
- Creator – describes the user who created the task.
- Event Initiator – represents the user who initiated the event.
- Source:ID – describes the source system and source system–assigned ID number.
- Member Name* – describes the name of the member for whom a task was created.
- Sex* – describes the member's gender.
- Date of Birth* – describes the member's date of birth.
- Phone* – describes the member's home telephone number.

Note: * These fields are customizable by editing the `webreports.properties` file.

Task Creation Detail Report

This InfoSphere MDM Inspector report displays information about the tasks that are being created.

Parameters

Entity Type
select the type of entity for this report. Entity types are customizable for each installation.

From
select the beginning of the date range during which the task was created.

To select the end of the date range during which the task was created.

Source Names
: select the sources of the member records for which you want to review tasks. The default is all source names.

Task Types
: select the task types to display in the report. The default is all task types.

Maximum number of trigger members to display
: select the maximum number of rows to display in the result set. The default is 1000.

Download results as CSV file
: if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report is not displayed in the default browser format when this option is checked.

Report fields

The Task Creation Detail report contains more data about the member records involved in each task.

- To toggle details for a single-line item, click the arrow icon in the left-most column.
- To view details for all line items, click the Expand All link.
- To return to showing summaries for all line items, click the Collapse All link.
- Task Creation Time – the date and time the task was created.
- Member Modification Time – the date and time the member record was updated.
- Enterprise ID – the enterprise identifier for the member record involved.
- Source:ID – an abbreviation of the source name and source identifier for the member record, which is separated by a colon.
- Task Type – the type of task created.
- Member Name* – name of the member for whom a task was created.
- Sex* – The member's gender.
- Date of Birth* – The member's date of birth.
- Phone* – The member's home telephone number.
- Score – The number that is assigned by the software, which indicates the probability that the various records in a linkage set represent the same person. Typically, the higher the score, the greater the likelihood.

Note: * These fields are customizable by editing the `webreports.properties` file.

Task Management Detail Report

This InfoSphere MDM Inspector report displays information about the volume of work performed and by whom.

Parameters

- Entity Type – select the type of entity for which the report is to be run. Entity types are customizable for each installation.
- From – select the beginning of the date range during which the status of the record was created. Use the calendar icon to select a date and the clock icon to select a time.

- To – select the end of the date range during which the status of the record was created. Use the calendar icon to select a date and the clock icon to select a time.
- Source Names – select the data source(s) to which tasks are associated. The default is all sources.
- Task Types – select the task types to display in the report. The default is all task types.
- Task Statuses – select the task statuses to display in the report. The default is all task statuses.
- Include tasks last updated by user – type the log-in names (comma-separated) of tasks you want to see which were performed by specific users.
- Download results as CSV file – if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report is not displayed in the default browser format when this option is checked.

Report fields

- User – describes the InfoSphere MDM Inspector user who managed the task.
- Task Type – describes the type of task being performed.
- Task Status – describes the status of the task.
- Number of Items – the total number of tasks by task type, user, and task status.

Task Management Overview Report

This report displays information about the volume of task types being created and resolved over a period of time. It is useful for showing outstanding work, and to track the volume of tasks created and resolved during specified time periods, to aid in planning and scoping.

Parameters

When specifying a date range for this report, note that your results will show both the tasks created within that range, and the tasks resolved within that range, regardless of when the resolved tasks were created. For example, if you created 20 tasks in January and 10 more tasks in February, then resolved all those tasks in February, a Task Management Overview report for the month of February would show 10 tasks created and 30 tasks resolved.

- Entity Type – select the type of entity for which the report is to be run. Entity types are customizable for each installation.
- From – select the beginning of the date range during which the status of the record was created. Use the calendar icon to select a date and the clock icon to select a time.
- To – select the end of the date range during which the status of the record was created. Use the calendar icon to select a date and the clock icon to select a time.
- Source Names – select the data source(s) to which tasks are associated. The default is all sources.
- Task Types – select the task types to display in the report. The default is all task types.
- Download results as CSV file – if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report will not be displayed in the default browser format when this option is checked.

Report fields

- Source – describes the source of the data for the task types listed beneath.
- Task Type – describes the type of task being performed.
- Number of Records Created – describes the number of tasks created of the corresponding task type which are not in a "Resolved" status.
- Number of Records Resolved – describes the number of tasks resolved during this time frame for the corresponding task type. Note that the report shows tasks resolved in the specified date range, regardless of when the task was created. If a task was created in January and resolved in February, and this report was run for the month of February only, that task would be counted in the Number of Records Resolved column but not in the Number of Records Created column.
- Number of Events – describes the number of tasks created as a result of an event.

Chapter 3. Operational Reports

Operational reports help data managers collect trusted, accurate information on the states of the data issues, their distribution across the stewardship team, and how these issues split up when viewed from a business classification perspective.

Outstanding Task Count by Source and Task Type

This Operational report lets you view outstanding tasks by source and by task type.

Parameters

This report is helpful for evaluating the “health” of your various data sources (for example, does one data source account for more potential duplicates than the others?), and for monitoring the frequency of tasks types by data source.

- Source Names – choose one or more source to report on.
- Task Types – choose one or more task type to report on.
- Download results as CSV file – if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report will not be displayed in the default browser format when this option is checked.

Report fields

- Source – lists all the sources for each task type.
- Task Type – gives a count of tasks of each type, for each source.
- Source Total – gives the total of tasks for each task source.
- Task Type Total – gives the total of tasks for each task each type.

Assigned Task Count by Owner and Task Type

This Operational report displays counts of open, assigned tasks by owner. The task owner can be a user, or a group. This report is useful for understanding and tracking task workload and productivity, and how it is distributed among a data stewardship team.

Parameters

Note that this report is a snapshot of current task assignments; resolved tasks are not reflected in this report. Running this report on a regularly-scheduled basis can help you track trends in workload and productivity over time.

You can drill down from this report to a related report showing task count detail by owner.

- Include Users – select one or more user(s) to report on.
- Include Groups – select one or more group(s) to report on.
- Download results as CSV file – if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report will not be displayed in the default browser format when this option is checked.

Report fields

- Owner Name – lists the owners (users or groups) of each type of task reported on. Tasks which are not assigned to a user or group appear in the report as **mdmadmin** (unassigned) tasks.
- Owner Type – describes the type of owner, User or Group.
- Task Types – provides a count of tasks of a given type, for this owner. Possible task types are Potential Overlay, PreMerge, Potential Duplicate, Potential Linkage, and Review Identifier. You can click on the count number to drill down to a detail report listing all the individual tasks for this owner and task type. See "Task Count by Owner" for more information.
- Task Type Total – provides a total count of all tasks of this type. You can click on the total number to drill down to a detail report listing all the individual tasks of this type. See "Task Count by Owner" for more information.
- Owner Total – provides a total count of tasks of all types for this owner. You can click on the total number to drill down to a detail report listing all the individual tasks assigned to this owner. See "Task Count by Owner" for more information.

Task Count By Tag Type

This Operational report shows a summary of tasks by the tags you have defined.

Parameters

Keep in mind that because you can assign multiple tags to a given task, some tasks may be counted in more than one tag's totals. For example, a company which manufactures computer parts and sells them to corporate customers around the world might have a tag for "Data Quality Issues – Japanese market" as well as tags for each of their Japanese customers. Thus a data-quality issue at Toyko-XYZ Company could be tagged as both "Tokyo-XYZ" and "Data Quality Issues – Japanese market" and appear under the count summary for each of these tags on this report.

- Include Tags – select one or more tag(s) to report on.
- Download results as CSV file – if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report will not be displayed in the default browser format when this option is checked.

Report fields

- Tag – identifies the tag type.
- Entity Type – identifies the entity type.
- # of Tasks – shows the total number of open tasks, by tag.

Task Count by Owner

This report provides a detailed list of the tasks displayed in the Assigned Task Count by Owner and Task Type report. Once you run that report, you can click on the results for any owner or type to open the Task Count by Owner report.

This report lets you see who is working on which types of tasks, and which workflow status the tasks are currently at.

To open the Task Count by Owner report, click on a linked (underlined) report result for an individual owner and task type in the "Assigned Task Count by Owner and Task Type" on page 15 results:

- Click Owner Total for a given Owner to see details for all tasks for this Owner.
- Click Task Type Total for a given Task Type to see details for tasks of this type, for all Owners.
- Click a task count for a given Owner and Task Type to see task details for this owner for this task type.

Report fields

The report results you see will depend on which value you clicked in the "Assigned Task Count by Owner and Task Type" on page 15 report.

- Owner – the User or Group whose task details are included in this report.
- Task Type – describes which task status(es) are included in this report. Which task status(es) are included will depend on the "Assigned Task Count by Owner and Task Type" on page 15 field you clicked on to drill down to this detail report.
- Task Status – lists the task status(es) included in the report.
- Number of Tasks – shows the number of tasks of each type and status for the specified owner, or all tasks for the specified task type and status.
- Total – shows the total of all tasks for the type, status, and owner.
- Download results as CSV file – if you prefer to view the results in a spreadsheet or other program, click this link to save the results as a text file with comma-separated values (CSV).

Chapter 4. Workbench Reports

These reports are designed to give the end user a view into the operational server with regard to tasks and events.

Additions

This report displays details about member records that have been added to the software. This includes records that have been added through messages or directly into the operational server.

Parameters

Entity Type
select the type of entity for this report. Entity types are customizable for each installation.

From
select the beginning of the date range during which member records were added to the operational server.

To select the end of the date range during which member records were added to the operational server.

From Enterprise ID
select the starting enterprise id in the range of possible numbers.

To Enterprise ID
select the ending enterprise id in the range of possible numbers.

Source Names
select the data source for the records.

Maximum results to display
select the maximum number of rows to display in the result set. The default is 1000.

Download results as CSV file
if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report is not displayed in the default browser format when this option is checked

Report fields

- Enterprise ID – describes the enterprise identifier for the member record involved.
- Source:ID – describes the abbreviated source name and source identifier for the member record, which is separated by a colon.
- Member Name* – describes the name of the member for whom a task was created.
- Sex* – describes the member's gender.
- Date of Birth* – describes the member's date of birth.
- Phone* – describes the member's home telephone number.
- Addition Date – describes the record creation date.
- User – describes the user who created the record.

Note: * These fields are customizable by editing the `webreports.properties` file.

User Activity Summary

This InfoSphere MDM Workbench report enables users to review information about the activities of other software users.

Parameters

- From – select the beginning of the date range during which the event was created.
- To – select the end of the date range during which the event was created.
- Include activities that are initiated by user – type the log-in names (comma-separated) of users to see activities that are initiated by those users.
- Download results as CSV file – if you prefer to view the results in a spreadsheet or other program, check this option to save the results as a text file with comma-separated values (CSV). The report is not displayed in the default browser format when this option is checked.

Report fields

- Activity – describes the activity that occurred within the date range selected.
- User Name – represents the number of activities that are initiated by this user.

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Contacting IBM

You can contact IBM for customer support, software services, product information, and general information. You also can provide feedback to IBM about products and documentation.

The following table lists resources for customer support, software services, training, and product and solutions information.

Table 1. IBM resources

Resource	Description and location
Product documentation for InfoSphere MDM	You can search and browse across all the InfoSphere MDM documents at http://www.ibm.com/support/knowledgecenter/SSWSR9_11.3.0.
Product documentation for InfoSphere MDM Custom Domain Hub, including InfoSphere MDM Reference Data Management	You can search and browse across all the InfoSphere MDM Custom Domain Hub documents at http://www.ibm.com/support/knowledgecenter/SSLSQH_11.3.0.
IBM Support Portal	You can customize support information by choosing the products and the topics that interest you at www.ibm.com/support/.
Software services	You can find information about software, IT, and business consulting services, on the solutions site at www.ibm.com/businesssolutions/.
My IBM	You can manage links to IBM web sites and information that meet your specific technical support needs by creating an account on the My IBM site at www.ibm.com/account/.
Training and certification	You can learn about technical training and education services designed for individuals, companies, and public organizations to acquire, maintain, and optimize their IT skills at www.ibm.com/software/sw-training/.
IBM representatives	You can contact an IBM representative to learn about solutions at www.ibm.com/connect/ibm/us/en/.

Providing feedback

The following table describes how to provide feedback to IBM about products and product documentation.

Table 2. Providing feedback to IBM

Type of feedback	Action
Product feedback	You can provide general product feedback through the Consumability Survey at https://www.ibm.com/survey/oid/wsb.dll/studies/consumabilitywebform.htm.

Table 2. Providing feedback to IBM (continued)

Type of feedback	Action
Documentation feedback	To comment on the product documentation: • Click the Feedback link on the bottom of any topic in IBM Knowledge Center • Online reader comment form: www.ibm.com/software/data/rcf/ • E-mail: comments@us.ibm.com

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