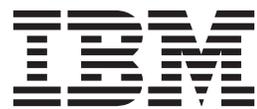


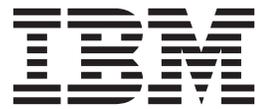
IBM InfoSphere Master Data Management
Version 11 Release 4

*IBM InfoSphere MDM Enterprise
Viewer User's Guide*



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Note

Before using this information and the product that it supports, read the information in “Notices and trademarks” on page 31.

Edition Notice

This edition applies to version 114 of IBM InfoSphere Master Data Management and to all subsequent releases and modifications until otherwise indicated in new editions.

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Chapter 1. InfoSphere MDM Enterprise Viewer basics

Use Enterprise Viewer to retrieve and view member record data.

The problem of duplicate identification numbers and records is magnified when multiple source systems manage different aspects of your organization's business. With potentially millions of records in combined databases, it can be difficult to search for and retrieve a specific member.

Your job is made easier when you can see an accurate, 360-degree picture of a member, and the software and InfoSphere® MDM Enterprise Viewer work together to do just that. When you request a search or retrieve in InfoSphere MDM Enterprise Viewer, the criteria is passed to the software. The algorithm, which is configured specifically for your data and business environment, compares the criteria against records that originate from your source systems to find the member records that match best. Those records are returned to Enterprise Viewer.

InfoSphere MDM Enterprise Viewer assists accurate data retrieval by achieving the following objectives:

- Provides enterprise access to data;
- Provides an intuitive and simple process for retrieving and selecting the best candidate record;
- Ranks the possible matches in order of the likelihood of representing the correct member; and
- Provides a level of confidence for each possible match that is presented.

Authorized users access a secured website to use InfoSphere MDM Enterprise Viewer. User names, passwords, and permissions are created in InfoSphere MDM Workbench.

Using InfoSphere MDM Enterprise Viewer

InfoSphere MDM Enterprise Viewer provides enhanced search capabilities to help staff minimize the creation of duplicates, thereby facilitating your organizational goal of one enterprise view for each member.

Composite views

These views enable application administrators to control the data returned via InfoSphere MDM Enterprise Viewer searches. If composite views are not implemented, the default is an enterprise view.

The following lists examples of views that can be configured:

- **EMCA** – **Entity Most Current Attribute**. This display takes the attributes from any record within a defined linkage (records that share a common Enterprise ID) and combines the attributes so that the view of the member is a conglomeration of the most recent attributes from your various source systems.
- **Trusted** – This view displays the most current attributes available from the specified source. This view can be used if an organization has great confidence that the data from a particular source is accurate, or they wish to restrict access to all but one source.

- **Controlled** – This view displays a selection of various attributes from multiple specified sources. For example, you can specify that name and address are retrieved from Source A, phone and birth date from Source B, and Social Security number and address from Source C.
- **Restricted** – A restricted composite view shows only EMCA views. Users assigned this composite view in their user profile will not have the option of seeing source-specific columns. A restricted view is often implemented in environments where security policies require controlled access to certain data. One example is in a hospital where an employee in the billing department needs to see a member name and insurance information, but they are not legally allowed to view specific medical data.

Each User ID (Username) can be set up to default to a specific composite view. Composite views and User IDs are created and managed through the InfoSphere MDM Workbench application.

Note: When defining composite views, the software can be configured to use either the event date or a Source event date to determine the most current attribute to return for a member. This setting becomes important in environments where a particular source feeds data to the software in a batch or delayed mode and guards against out-of-date information being displayed as the most current attribute value in InfoSphere MDM Enterprise Viewer.

Searching in InfoSphere MDM Enterprise Viewer

The search function uses unrestricted naming conventions and an equivalent name table.

The intelligence of the application enables some flexibility in search criteria in that it can search with limited information.

Unrestricted Naming Conventions: You can enter data in any format without being restricted to any type of naming conventions. Unrestricted naming conventions include:

- First or last name in upper case
- First or last name in lower case
- First or last name in upper and lower case
- First or last name with or without hyphens
- First or last name with apostrophe
- First or last name with prefix or suffix attached

Equivalent Name Table: An equivalence name table in the database assists the algorithm in managing names with variable spellings or to account for nicknames.

Differences between search and retrieve

Use the search or retrieve functions to access data.

Understand the difference between search and retrieve to ensure efficient data retrieval.

1. **Search.** When you perform a member search by entering demographic information on the Search Identity or Search Household page, the software creates a “virtual member” record. From that virtual member, the application's algorithm compares the attributes against other records to determine potential

candidates. A score, reflecting the confidence of a match, is assigned to each record. The score is based on a comparison between the criteria specified in the search and the candidate itself. The higher the score, the more likely the candidates match the search criteria.

2. **Retrieve.** If you enter information on the Retrieve page, the application “gets” the requested record. This record is not compared against any other record during the “get” process. A retrieve only displays the specific record requested. However, if the record is linked to other records by Enterprise ID, the records are returned as an entity or linkage set.

Although, the application can operate with limited input criteria, the key to achieving accurate search results is that the more information (search criteria) you provide, the better the results.

Note: All search results are generated in real-time and the linkages and tasks that display are created dynamically when the search or retrieve is requested.

Launching InfoSphere MDM Enterprise Viewer

To start using Enterprise Viewer, you must know how to access the application.

Procedure

1. Open your Internet browser and access the application according to your organization's instructions.
2. On the login page, type your assigned **Username**, and then type your **Password**.
3. From the Start Page pull-down list, select **Search-Identity**, **Search-Household**, or **Retrieve** as appropriate.
4. Click **Login**.

Chapter 2. Identity Search in InfoSphere MDM Enterprise Viewer

Identity searches return results for individuals that are known in the database as an *Identity Entity* (such as records linked based on attributes: name, date of birth, Social Security number).

Searches are conducted using various demographic or identifier data. The attributes that can be used to conduct a search are configurable and might differ between implementations. However, the attributes represent those from the pre-configured member type templates (Person, Provider, Guest, or Organization). Consult with your supervisor to determine the specific attributes and combinations in use for your organization.

When you perform a member search (regardless of entity type), the software creates a “virtual member” record. From that virtual member, the algorithm compares the attributes against other records to determine potential candidates. A score, reflecting the confidence of a match, is assigned to each record. The score is based on a comparison between the criteria that are specified in the search and the candidate itself. The higher the score, the more likely the candidates match the search criteria. InfoSphere MDM Enterprise Viewer returns the top candidates that meet the search criteria. The default return limit is 15; if there are more than 15 potential candidates, the best 15 are displayed first. You can choose to return more or less than the default.

Note: Remember, a search is different from a retrieve and the results are affected by the method used. A search looks for similar candidates; a retrieve “gets” the member.

InfoSphere MDM Enterprise Viewer Search Person page

Use this function to search for records using demographic data.

The application deploys the algorithm to compare this data and return a set of viable candidates. Your organization's business processes may determine specific kinds of searches, which may not be outlined in this document.

The pre-configured attribute combinations that can be used in a person search are:

- First name and last name only
- First and last name with middle name
- Social Security Number with first and last name
- Gender with first and last name
- Birth date with first and last name
- Telephone with first and last name
- Combination of all with first and last name

Social Security Number: Enter the person's Social Security number. You cannot search by Social Security number alone; use additional identifiers, such as name or telephone.

Last Name, First Name, and Middle Name: Entering at least the last and first name of the person is required on the search page; middle name is optional. You can search by name alone; however, if you elect to search by name, you must have both the first and last.

Gender: Select the person's gender from a pull-down list. You cannot search by gender alone; gender must be used with other identifiers.

Birthdate: Enter the person's date of birth by numeric year, month, and day (for example, YYYYMMDD format of 20030814). You cannot search by birth date only; you must also use last name and first name.

Telephone: Enter the person's phone number.

Row Limit: This determines the number of rows to return on the results page. The default is 15.

Minimum Score: To narrow your search to records above a certain comparison score, enter a minimum score.

Composite View: If your organization uses composite views, you can select to display results in one of the listed views or choose not to use a composite view. The default is the view that is specified for your User ID; User IDs are created and managed through InfoSphere MDM Workbench. If your implementation does not use composite views, No View or None is the default.

InfoSphere MDM Enterprise Viewer Search Provider page

Use the Provider Search function to search by demographic data.

The application deploys the algorithm to compare this data and return a set of viable candidates. Your organization's business processes may determine specific kinds of searches, which may not be specifically outlined in this document.

The pre-configured attribute combinations that are used in a provider search are:

- First name and last name only
- Business name only
- Business name and phone number
- First and last name with phone number
- First and last name with middle initial
- Date of birth with first and last name or business name
- Gender with first and last name or business name
- Address (including Zip code) with first and last name or business name
- License numbers only (this depends upon your organization's configuration)
- License numbers with first and last name or business name
- Combination of all with first and last name or business name

Last Name, First Name, and Middle Initial: Enter the provider name. You can search by name alone. A name or business name is required for all searches.

Business Name: Enter the business name and phone number for a provider. You can search by business name alone.

Address Lines: Enter the mailing address, city, and state. Address must be used with additional identifiers.

Zip: The mailing address Zip code.

Telephone: Enter the provider's telephone number.

Gender: Select the provider's gender from the pull-down list. You cannot search by gender alone; gender must be used with additional identifiers.

Birthdate: Enter the provider's date of birth by year, month, and day (for example, YYYYMMDD format of 20030814).

Social Security Number: Enter the provider's Social Security number.

Unique Identifiers: Several options are available for entering unique identifying information about a provider, including Unique Provider Identification Number (UPIN), National Provider Identification number (NPI), Task Identification Number (TIN), Medicare, Medicaid, state license numbers (St. Lic.), state narcotics numbers (St. Narc.), and Drug Enforcement Agency (DEA). Depending upon your configuration, you may be able to search by certain identifiers alone (without name). Consult with your supervisor or your applications manager to verify specific allowable search criteria.

Row Limit: This specifies the number of rows to return on the results page. The default is 15.

Minimum Score: To narrow your search to records above a certain comparison score, enter a minimum score.

Composite View: If your organization uses composite views, you can select to display results in one of the listed views. The default is the view specified for your User ID; User IDs are created and managed through InfoSphere MDM Workbench. If your implementation does not use composite views, No View or None is the default.

InfoSphere MDM Enterprise Viewer Search Guest or Customer page

Use this function to search for a record using demographic data.

Your organization's business processes may determine specific kinds of searches, which may not be outlined in this document.

The pre-configured attribute combinations that are used in a guest search are:

- First name and last name only
- First and last name with address
- Identifier type and number (depending upon your configuration, this might not be applicable)
- Birth date with first and last name
- Telephone with first and last name
- Email with first and last name
- Combination of all with a first and last name

Last Name, First Name, and Middle Name: At a minimum, you must enter the last and first name of the guest; middle name is optional. You can search by name alone; however, if you elect to search by name, you must have both the first and last name.

Address Lines, City, State, Zip: Enter the guest's address. There are two lines available for the street address.

Identifier Type: Select the Identifier Type issuer from the pull-down list.

Identifier Number: Enter the Identifier number. Depending upon your configuration, you may be able to search by identifiers alone (without name or other attributes). Consult with your supervisor or your applications manager to verify specific allowable search criteria.

Birthdate: Enter the guest's date of birth by numeric year, month, and day (for example, YYYYMMDD format of 20030814). You cannot search by birth date only; you must also use last name and first name.

Telephone: Enter the guest's phone number.

Email: Enter the guest's email address.

Row Limit: This determines the number of rows to return on the results page. The default is 15.

Minimum Score: To narrow your search to records above a certain comparison score, enter a minimum score.

Composite View: If your organization uses composite views, you can select to display results in one of the listed views. The default is the view that is specified for your User ID; User IDs are created and managed through InfoSphere MDM Workbench. If your implementation does not use composite views, No View or None is the default.

The pre-configured attribute combinations that are used in a guest search are:

- First name and last name only
- First and last name with address
- Identifier type and number (depending upon your configuration, this might not be applicable)
- Birth date with first and last name
- Telephone with first and last name
- E-mail with first and last name
- Combination of all with a first and last name

InfoSphere MDM Enterprise Viewer Search Organization page

Use the Organization Search function to search by data. The application deploys the algorithm to compare this data and return a set of viable candidates.

Your organization's business processes may determine specific kinds of searches, which may not be outlined in this document.

Organization Name: At a minimum, you must enter the name of the organization. You can search by name alone.

Address Lines: Enter the mailing address, city, and state. Address must be used with additional identifiers.

Zip: The mailing address Zip code.

Telephone: Enter the organization's telephone number.

TIN: Enter the federally assigned tax identification number.

State Lic.: Enter the state license number, if applicable. Select the Issuer from the pull-down list.

Row Limit: This determines the number of rows to return on the results page. The default is 15.

Minimum Score: To narrow your search to records above a certain comparison score, enter a minimum score.

Composite View: If your organization uses composite views, you can select to display results in one of the listed views. The default is the view that is specified for your User ID; User IDs are created and managed through InfoSphere MDM Workbench. If your implementation does not use composite views, No View or None is the default.

Searching for a person in InfoSphere MDM Enterprise Viewer

When you request a search, enter as much information as possible to return a complete set of candidates to review.

About this task

These steps cover the pre-configured Person search. The minimum required criteria and identifier combinations for your organization could vary.

Procedure

1. If you are on the Login page, select **Search-Person Identity**. Otherwise, click **Search Identity**, which is at the top of any page.
2. Type the person's name—**Last Name/First Name**. Remember, if you search by name, you must enter both a first and last name. Partial names are not valid (for example, entering R instead of spelling Rob). Nicknames or shortened names may be accounted for in the search. For example, if you enter Bob Jones and the person is entered in the system as Robert Jones, Enterprise Viewer returns Robert Jones.
3. Type any additional information available, such as the Social Security Number, Middle Name, Gender, Birth date, or Telephone number.
4. You can limit the number of rows that are returned in the result by typing a number in the **Row Limit** field. The default is 15. You can further narrow your search by entering a **Minimum Score**, which returns records that score above that number.
5. Select the **Composite View**.

6. Click **Search**. The candidates that are returned met some set of the criteria that are used in the search.

Results

The results are displayed on the Search Results page.

To enter new search criteria, click **Reset**.

Note: You must type a Last Name and First Name. For best results, provide additional criteria.

Searching for a provider in InfoSphere MDM Enterprise Viewer

When you request a search, enter as much information as possible to return a complete set of candidates to review.

About this task

These steps cover the pre-configured Provider search. The minimum required criteria and identifier combinations for your organization may vary.

Procedure

1. If you are on the Login page, select **Search-Provider**.
2. Type the provider's **Last Name/First Name** or **Business Name**. At a minimum, you must enter a name.
3. Enter any additional information that is known, such as address, phone, gender, or date of birth.
4. Enter any additional identifier numbers, such as state license or Medicare numbers.
5. You can limit the number of rows that are returned in the result by typing a number in the **Row Limit** field. The default is 15. You can further narrow your search by entering a **Minimum Score** which returns records that score above that number.
6. Select the **Composite View**.
7. Click **Search**.

Results

Note: Providing as much information on the Search page as possible increases the accuracy of the returned results.

Search by identifier in InfoSphere MDM Enterprise Viewer

Use this procedure if your configuration enables you to search by identifier numbers only.

About this task

Check with your supervisor or application manager to verify required search criteria.

Procedure

1. Type the identifier information in the corresponding field. For St. Lic. Issuer, St. Narc. Issuer, DEA Issuer, or Medicaid Issuer fields, select data from the associated pull-down lists.
2. Select the **Composite View**.
3. Click **Search**.

Results

Search results are displayed on the Search Results page (discussed in Chapter 5, “InfoSphere MDM Enterprise Viewer search results,” on page 17).

Searching for a guest or customer in InfoSphere MDM Enterprise Viewer

When you request a search for a guest or customer, enter as much information as possible to return a complete set of candidates to review.

About this task

These steps cover the pre-configured Guest search. The minimum required criteria and identifier combinations for your organization could vary.

Procedure

1. From the Login page, select **Search-Guest Identity**.
2. Type the guest's name—**Last Name/First Name**. Remember, if you search by name, you must enter both a last and first name. Partial names (such as entering R instead of spelling Rob) are not valid. Nicknames or shortened names may be accounted for in the search. For example if you enter Bob Jones and the guest is entered in the system as Robert Jones, Enterprise Viewer returns Robert Jones.
3. Type any additional information available, such as address, birth date, telephone number, email address, or an identifier number. Depending upon your configuration, you may be able to search by identifiers alone (without name or other attributes).
4. You can limit the number of rows that are returned in the result by typing a number in the **Row Limit** field. The default is 15. You can further narrow your search by entering a **Minimum Score**, which returns records that score above that number.
5. Select the **Composite View**.
6. Click **Search**. The candidates that are returned met some set of the criteria that are used in the search.

Results

The results are displayed on the Search Results page. To enter new search criteria, click **Reset**.

Searching for an organization in InfoSphere MDM Enterprise Viewer

When you request an organization search, enter as much information as possible to return a complete set of candidates to review.

About this task

These steps cover the pre-configured Organization search. The minimum required criteria and identifier combinations for your organization could vary.

Procedure

1. From the Login page, select **Search-Organization**. Otherwise, click **Search Organization**, which is located at the top of any page.
2. Type the **Organization** or **Company Name**. Partial names are not valid, for example, entering R instead of spelling Robbins.
3. Type any additional information available, such as address, Zip code, telephone number, tax identification number (TIN) or a state license number (State Lic.) and issuer. Depending upon your configuration, you may be able to search by identifiers alone (without name or other attributes).
4. You can limit the number of rows that are returned in the result by typing a number in the **Row Limit** field. The default is 15. You can further narrow your search by entering a **Minimum Score**, which returns records that score above that number.
5. Select the **Composite View**.
6. Click **Search**. The candidates that are returned met some set of the criteria that are used in the search.

Chapter 3. Household Search in InfoSphere MDM Enterprise Viewer

Household searches return results for individuals known in the database as a "Household Entity."

A household entity consists of multiple individuals who are grouped as a single entity because they are associated with the same physical location. Members of a household entity share a common Enterprise ID.

The attributes that can be used to conduct a search are configurable and may differ between implementations. However, the attributes represent those from the pre-configured member type templates (Person, Provider, Guest or Organization). Consult with your supervisor to determine the specific attributes and combinations in use for your organization.

Note: Remember, a search is different from a retrieve and the results are affected by the method used. A search looks for similar candidates; a retrieve "gets" the member.

Search household page in InfoSphere MDM Enterprise Viewer

Use this to search for household entity records using demographic data.

The application deploys the algorithm to compare this data and returns a set of viable candidates. Your organization's business processes may determine specific kinds of searches, which may not be outlined in this document. Because household entities are linked based on physical location attributes, the dialogs are similar for each member type. The significant difference could be the address type used, for example the address may be a business address for a provider or company rather than a home address.

The pre-configured attribute combinations that can be used in a household search are:

- Address with City, State, Zip code, and Telephone
- Telephone with complete address (Address, City, State, Zip code)
- Telephone with Zip code

Telephone: The member's phone number.

Address Lines: The member's address.

City: The city associated with the address.

Zip: The member's Zip code associated with the address.

Row Limit: This determines the number of rows to return on the results page. The default is 15.

Minimum Score: To narrow your search to records above a certain comparison score, enter a minimum score.

Composite View: If your organization uses composite views, you can select to display results in one of the listed views. The default is the view specified for your User ID (User IDs are created and managed through the Workbench). If your implementation does not use composite views, “No View” or “None” will be the default.

Searching for household entities in InfoSphere MDM Enterprise Viewer

Use this procedure to search for a Household entity type. Provide as much information as possible to increase the accuracy of the results.

About this task

The attributes included in these instructions represent pre-configured attributes. Your specific implementation may utilize additional attributes. Check with your supervisor for your required search criteria.

Procedure

1. Select **Search-Household** from either the Login page or the top of any page.
2. Type the member's **Telephone** number.
3. Type the member's address in the **Address Lines** fields.
4. Type the address **City**.
5. Type the address **State**.
6. Type the address **Zip** code.
7. You can limit the number of rows that are returned in the result by typing a number in the **Row Limit** field. The default is 15. You can further narrow your search by entering a **Minimum Score**, which returns records scoring above that number.
8. Select the **Composite View** from the pull-down list.
9. Click **Search**. The candidates that are returned met some set of the criteria used in the search.

Results

The results are displayed on the Search Results page.

To enter new search criteria, click the **Reset** button.

Chapter 4. The Retrieve function in InfoSphere MDM Enterprise Viewer

The Retrieve function is used to request a member record when you know the specific identifier.

When you use the Retrieve function, you tell the application the specific Source and Source ID or Enterprise ID of the member you want. Unlike a search, during which the application uses attributes to gather potential candidates that meet the search criteria, a retrieve literally “gets” the requested member record. A retrieve provides you with the most accurate view of a member. The following fields are available when using Retrieve:

- **Source/Source ID:** The specific Source and Source ID of the member. You must enter both to retrieve the record.

Enterprise ID: The specific Enterprise ID number assigned to this member.

Composite View: The particular composite view you want to see.

Entity View: Either Identity or Household. The default is Identity. (If your organization does not implement multiple entities, this is not required.)

The Retrieve page is the same regardless of the member type implemented.

Retrieving records in InfoSphere MDM Enterprise Viewer

You can retrieve a specific record by entering **one** of the two specific identification numbers (Source ID or Enterprise ID).

About this task

The Retrieve function is not a search.

Procedure

1. From the Login page, select **Retrieve-“Member Type” Identity**.
2. On the Retrieve page, select the **Source** from the pull-down list. You must select a Source if you are retrieving by Source ID.
3. Type the **Source ID**.
4. Select the **Composite View** from the pull-down list.
5. Select the **Entity Type** from the pull-down list—either **Identity** or **Household**, and then click **Retrieve**.

Retrieve by Source ID in InfoSphere MDM Enterprise Viewer

You can retrieve a specific record by entering one of the two specific identification numbers (Source ID or Enterprise ID).

About this task

Use this procedure to retrieve by Source ID.

Procedure

1. From the Login page, select **Retrieve-“Member Type” Identity**.

2. On the Retrieve page, select the **Source** from the pull-down list. You must select a Source if you are retrieving by Source ID.
3. Type the Source ID.
4. Select the **Composite View** from the pull-down list.
5. Select the **Entity Type** from the pull-down list.
6. Click **Retrieve**.

Retrieve by Enterprise ID in InfoSphere MDM Enterprise Viewer

You can retrieve a specific record by entering one of the two specific identification numbers (Source ID or Enterprise ID).

About this task

Use this procedure to retrieve records by Enterprise ID.

Procedure

1. From the Login page, select **Retrieve-“Member Type” Identity**.
2. On the Retrieve page, type the Enterprise ID.
3. Select the **Composite View** from the pull-down list.
4. Select the **Entity Type** from the pull-down list.
5. Click **Retrieve**.

Chapter 5. InfoSphere MDM Enterprise Viewer search results

After a search has been executed, a set of candidates is returned and displayed in order of score; highest to lowest. The highest score is assigned to the member that best matches the criteria.

The number of rows that are returned in the search results defaults to 15, but you can set a higher or lower number.

When a search is conducted in InfoSphere MDM Enterprise Viewer, regardless of entity type, the selected composite view determines the contents of the display.

Note: Composite Views are not defined for use. The following information is a guideline for configuring Composite Views.

- **Composite view selected:** No View or None. This view shows an enterprise view of the member and returns all records that match the search criteria.
- **Composite view selected:** EMCA. If you select an EMCA (Entity Most Current Attribute) View, this demographic data is a collection of information from all the sources included in the enterprise set. For example, if a member's name is changed in source system A and their address is changed in source system B, the data that is shown on the Results page would contain the new name (from Source A) and address (from Source B).
- **Composite view selected:** Controlled. This view shows the most current attributes from a specified single source.
- **Composite view selected:** Trusted. This view shows a selection of attributes from multiple specified sources.
- **Composite view selected:** Restricted. This view shows only an EMCA view of a member, a conglomeration of current attributes from all sources. Users selecting this composite view do have the option of seeing source-specific columns.

The combinations of composite views that can be set up are fairly flexible. All composite views are created and managed through the InfoSphere MDM Workbench application.

InfoSphere MDM Enterprise Viewer Results page

Descriptions for the typical information that is returned on the results page for each member and entity type.

The attributes that are described represent the pre-configured attributes and can differ based on your organization's implementation of the application. At the top of the page, you can see the composite view and search criteria that are entered on the search page.

Note: InfoSphere MDM Enterprise Viewer does not refresh the displays dynamically. If you are viewing search results and a change occurs to the data in the background, the new data will not automatically (dynamically) display on the page. To see the updated information, you must refresh the display by clicking the **Refresh** button on your browser. Refresh runs the search query again.

Options

The Select All, Reset, and View Detail options are available for all member types.

- **Select All:** Places a check mark in each member record that is displayed. Subsequent Detail views include all the records. To select individual records, click each corresponding check box.
- **Reset:** Removes the check mark from any selected records.
- **View Detail:** Displays the Detail View for any selected records. You must select at least one check box.

Search results fields

There are several pre-configured fields that are typically displayed on the Results page. The actual displayed fields vary based on your specific configuration. Where applicable, the member type typically associated with the field is defined.

- **ID's:** *All member types.* Displays the Enterprise ID for the returned member. Depending upon the composite view selected, the Source ID might also display.
- **Score:** *All member types.* The comparison score assigned by the software.
- **Legal Name:** *Most member types.* Displays the member's name as stored in the database.
- **Social Security:** *Person member type.* The unique Social Security number for the member.
- **Home Address:** *Person and Guest member types.* The latest home address known for this member in the database.
- **Home Telephone:** *Person and Guest member types.* The latest home phone number known for this member.
- **Birth Date/DOB/Birth Month-Date:** *All member types except Organization.* The member's date of birth.
- **Sex:** *Person member type.* The member's gender.
- **UPIN:** *Provider member type.* The unique provider identification number.
- **Address:** *Provider member type.* The latest service address known for this provider.
- **Phone:** *Provider member type.* The latest service phone known for the service address.
- **Business Phone:** *Guest member type.* The guest's business phone number.
- **Preferred Credit Card:** *Guest member types.* The credit card number provided by the guest.

Getting details in InfoSphere MDM Enterprise Viewer

Additional demographic data about the returned candidates is also available for review.

About this task

Use this procedure to find additional information.

Procedure

1. Click the check box for the record that you want to review. To view details of each member record in the list, click **Select All**.
Click **Reset** to remove the check marks from the check boxes.
2. Click **View Detail**, which is available at both the top and bottom of the page.

Results

Note: Numbers that display in parentheses next to an attribute indicate an Index value. If a member has more than one active attribute of the same type (for example, more than one valid mailing address), an index value may be assigned. This index value enables an association between specific attributes (for example, a billing address that also has a corresponding business phone). By evaluating this index value, a user can determine the relationships to other relevant attributes.

The results are displayed on the Detail View page.

Chapter 6. InfoSphere MDM Enterprise Viewer Detail View

The Detail View page is accessed by selecting a candidate from a Search Results page or by retrieving a member through the Retrieve page.

The Detail View page provides access to additional attributes associated with the selected member from a source-specific level. Each column on the Detail View page represents a source record for the member with an additional column representing the enterprise view.

Note: Remember, previous attributes were a combined enterprise view.

Detail View page

The columns on this page are customer-defined and reflect additional attribute information about the requested member. The header columns and options available from this page are also explained. The attributes that are shown are the standard pre-configured attributes.

The following options are available from the Detail View page for all member types.

- **Reset:** Removes the check mark from any selected records
- **Report:** Displays a report of attribute status for the selected records in a printer-friendly format.
- **History:** Displays an attribute history for the selected records.
- **Household View / Identity View:** Enables you to switch between displayed entity types if member information is stored as both types. If your user profile is set to a restricted composite view, these buttons are removed.
- **Previous Page:** Redisplays the Results page.

Note: Restricted Composite Views: The look of the Detail View page is dependent on the composite view selected. If your user profile assigns a restricted composite view, source-specific columns are not displayed. Instead, the view shows a conglomeration of the most recent attributes from your various source systems.

Note: The exact location of columns on the Detail View page can be configured. Depending on your configuration, enterprise view columns can display to the left or right of the source columns.

Fields

The **Enterprise ID**, **Source:Source ID**, **Get Notes**, and **Check Member/Entity Task** fields display for all member types. Those fields that are specific to a member type are identified as such.

- **Enterprise ID:** The assigned Enterprise ID.
- **Source:Source ID:** The Source/Source ID for the record.
- **Get Notes:** Create a note for the selected record. If a note icon displays, that indicates that at least one note exists for the selected record. Notes entered in Enterprise Viewer can also be viewed in the Inspector application (if applicable), and printed in the Notes Narrative report.

- **Check Member Task / Check Entity Task:** Indicates that the record is involved in a task. Clicking this icon displays the Task View page. This is read-only information. Tasks cannot be worked from Enterprise Viewer.
- **Get Event Summary:** Person member type. An icon indicates that event or encounter information exists for this member.
- **Get Contracts:** Provider member type. An icon indicates that contract information is available for this member.
- **Get Stay Info:** Guest member type. An icon indicates that stay information is available for the member.

The remaining data includes member type-specific attribute information that is stored in the database.

Viewing detail history in InfoSphere MDM Enterprise Viewer

To see detailed information quickly, view historical attribute data for a specific member record .

About this task

Use this procedure to view detail history.

Procedure

1. Click the check box under the record number.
2. Click **History**. Enterprise Viewer returns a detailed history of attributes. You can click **Previous Page** to return to the Detail View.

Results

Note: If your user profile assigns a restricted composite view, source-specific information does not display in the history view. Instead, the view shows a conglomeration of attributes from your various source systems.

The display shows:

- **Enterprise ID/Source:Source ID:** The Enterprise and/or Source ID for the member.
- **Attribute:** The attribute type, such as Legal Name.
- **Value:** The actual attribute value, such as the member's name.
- **Status:** The current status of the attribute as indicated by the following options:
 - A - Active: The attribute is active and represents a current value of the attribute. Active attributes are used by the algorithm.
 - I - Inactive: The attribute is inactive and represents an attribute that has been updated. Inactive attributes can be used by the algorithm.
- **Last Modified:** The date the attribute was last updated in the database.

Any *inactive* attribute values, status (*I*), and last modified date display in italics.

Changing composite views in InfoSphere MDM Enterprise Viewer

Changing composite views enables you to dynamically change the composite view from the Detail View.

About this task

Follow these steps to change the composite view.

Procedure

1. From the Detail View, click the **Composite View** pull-down list.
2. Select a composite view from the list.

Switching entity types in InfoSphere MDM Enterprise Viewer

This option enables you to switch the entity type that is displayed for a member. For example, if you have an Identity member that is displayed and you want to see a Household entity displayed.

About this task

For this option to be enabled, more than one entity type must be defined and active for the member type.

Procedure

1. Click the check box for the record.
2. Click **Identity View**, **Household View**, **Group View**, or **Organization View** as applicable.

Viewing InfoSphere MDM Enterprise Viewer reports

Within the application, you can view and print reports.

About this task

After you view a report, you can also print the report and specify which view to print.

Procedure

1. Click the check box for the member record.
2. Click **Report**.
3. After you view the report, click **Print Page** to print a copy. Click **Identity View**, **Household View**, **Group View**, or **Organization View** to get a different view of the member.

Results

Note: If your user profile assigns a restricted composite view, the report does not show source-specific information, but rather a conglomeration of the most recent attributes from your various source systems.

Adding and viewing notes

You can add and view notes from the **Detail View** page of InfoSphere MDM Enterprise Viewer.

About this task

After adding a note, you cannot change or delete it. If the existing text is no longer valid, you must create a note to add updated information.

Procedure

1. On the **Detail View** page, click the pencil or page icon in the appropriate column to display the Notes dialog box.
 - The pencil icon indicates that no notes exist for the record.
 - The page icon indicates that at least one note has been added to the record.
2. You can view any notes that are present, or type a note in the **New Notes** text field (which has a maximum 255 characters).
3. Click **Add Note**. A new window opens which displays with your note.
4. Click **Close Notes** to return to the Detail View

Results

Note: For notes to be retrievable in the Report View, the default "doMemGetAll.prop" must have the "MEMNOTE" segment code added to the "form.SegCodeFilter" property.

Viewing tasks

InfoSphere MDM Enterprise Viewer identifies potential data issues and assigns the associated records to tasks based on the error type.

About this task

Tasks are worked and resolved in Inspector; the information you see from the Task View in InfoSphere MDM Enterprise Viewer is informational only.

Procedure

1. Click the Check Member/Entity Task icon from the Detail View.
2. The Task View page displays the task information as shown in the example. Click the **Back** button on your browser to return to the Detail View page, or you can select a record and click **History** to view historical information about the attributes.

Results

The information that is provided on this page includes:

- **Enterprise ID:** The member's current Enterprise ID.
- **Source/Source ID:** The Source/Source ID for the record.
- **Check Member/Entity Task:** Indicates that the record is involved in a task. Clicking this icon redisplay the Task View page with that task record highlighted. This is read-only information.
- **Notes:** Create a note for the selected record. Click the Page icon to view existing notes for the record.
- **Task Type:** Identifies the type of task, such as Potential Duplicate, Potential Linkage, Potential Overlay, or Review Identifier.

- **Owner:** The user name of the individual working the task. Initially when a task is created, "System" is automatically assigned as the owner. Once a user begins to work the task (in Inspector), their user name is assigned as the owner until the task is resolved.
- **Task Status:** Indicates where the task currently stands in the workflow process. For example, if a task has not yet been reviewed, the task status could be Unexamined. If a user started to work a task, but needed more information, the task status might be Deferred.
- **Surviving Enterprise ID:** If a member has more than one enterprise record with differing Enterprise IDs, one number may be selected and assigned as the Enterprise ID for the member's records. This number becomes the Surviving Enterprise ID. The old Enterprise IDs become obsolete. A 0 in this field means that a Surviving Enterprise ID has not been assigned.
- **Surviving ID:** If a member has more than one record within a single source with differing Source IDs, one number will be selected and assigned as the Source ID. This number becomes the Surviving Member ID. The old IDs become obsolete. A 0 in this field means that a Surviving Member ID has not been assigned.
- **Max Score:** The highest comparison score that is computed against all other members in the task.
- **Match Score:** The comparison score that is based on search parameters.
- **Legal Name:** The member's name.

The remaining fields in the display contain attribute values that are known in the database for the member.

Displaying transaction information

In InfoSphere MDM Enterprise Viewer, transaction information includes account information for Person, Provider and Guest accounts.

Procedure

1. Click the **Get Event Summary** icon from the Detail View.
2. The appropriate page displays. Click the **Close Transaction Viewer** button to return to the Detail View page.

Results

The information that displays on the page is configurable based on the data stored. For example, pre-configured views can contain:

- **Person – Event Summary:**
 - Acct Num:** The associated account number.
 - Encounter Date:** The date on which the encounter occurred.
 - Discharge Date:** The date on which the person was discharged (if applicable).
 - Patient Type:** The identifier representing the type of patient (for example, outpatient).
 - Service Type:** The identifier representing the type of service received.
 - Service Location:** The location where service was rendered (for example, lab or hospital).
 - Physician 1 / 2:** The identifier(s) for the physician(s) involved in this encounter.
 - Plan 1 / Plan 2:** The insurance plan(s) used by the person.
 - User 1 / User 2:** Organization-defined fields.

- **Provider – Contracts**

LOB: Line of business identifier.

Center: Business center identifier.

Network: Provider network identifier.

Sequence: Contract sequence number.

Deal: Contract deal identifier.

Eff Date: Date the contract became effective.

End Date: Contract end date.

CIS ID: Identifier indicating the source system associated with the specific contract.

Par CD: Indicates whether the provider is participating in a specific network.

Market: Market identifier in which the provider is associated.

Name: Name of the contract.

ID: Contract identifier number.

Master: Contract master name.

ID: Master contract identifier.

- **Guest – Stay Information**

DOA: The date the guest arrived at the property.

Prop Code: The hotel's property code.

CC Type: The type of credit card used by the guest.

CC Number: The credit card number used by the guest. This number is encrypted.

CC Expire: The expiration date for the credit card.

Txn ID: The guest's tax identification number.

Appendix A. InfoSphere MDM Enterprise Viewer Troubleshooting

If issues arise while using InfoSphere MDM Enterprise Viewer, contact IBM® Software Support, or view the common error messages you may encounter.

Error messages

Some basic error messages may be encountered when using InfoSphere MDM Enterprise Viewer. Below are some of the common messages and steps to take to resolve the error.

- InfoSphere MDM Enterprise Viewer returns the error message ENOREC if no record is found based on the data you entered.
To resolve this error, click **Go Back** and review your input to see how you can improve the data entered on the Search page. Remember, the more information that you can provide, the better your search results will be.
- The **No Check Box Selected message** error message (“You must select a row to continue”) displays if you neglect to select a check box next to a record.
Place a checkmark on the record you want by clicking the box, or click the **Check All** button to select all records.

Appendix B. Internationalization in InfoSphere MDM Enterprise Viewer

InfoSphere MDM Enterprise Viewer can be viewed in alternate languages. For information on supported languages, contact your project manager.

If an organization has multi-language requirements, InfoSphere MDM Enterprise Viewer can only be displayed in one language at a time. The language in which the application displays is dependent on the language specified in your browser settings; the default setting is U.S. English.

To accommodate translation into other languages, dates entered on search pages are in the ISO 8601 format (YYYY-MM-DD). The first four digits are always assumed by the software to be the year.

True dates returned from the database, such as the Last Modified Date on a Detail History view, are formatted based on the browser locale. True dates are those dates required to be valid and complete. For example, the Last Modified Date in a U.S. English browser may display as 2011-08-14. A browser set to display French may display the date as 8 Jul 2011.

An assumption on the formatting of non-true dates—values that are not required to be valid or complete—can not be made for a given locale. These dates are retrieved from the database and are displayed as they exist in the database.

All labels, such as buttons for [Reset] and [Search], are retrieved from InfoSphere MDM Enterprise Viewer resource bundles. Such labels display in the language setting of the browser. Labels such as Last Name are retrieved from the database and are in the database-specified language. Entity and member types (for example, Identity and Person) are labels defined in the database and cannot be displayed in the local language.

Some labels are combinations of storage locale and have the ability to be formatted appositionally. For example, the combination of Enterprise Viewer application labels and database labels such as **Get Event Summary**. “Get” is an application label retrieved from an InfoSphere MDM Enterprise Viewer resource bundle, but “Event Summary” is a database label. The resource bundle allows for the word “Get” to be moved as needed by the language around the “Event Summary” label. The same is true for the entity bar and title of the page.

Error messages sent to the browser (for example, “No record found based on the input criteria”), and thus seen by users, display in the localized language. However, error messages sent to log files are in U.S. English only.

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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: <ul style="list-style-type: none">• 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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