

MDM Contact Point behaviour during Manual Merge using IBM Stewardship Center

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Overview

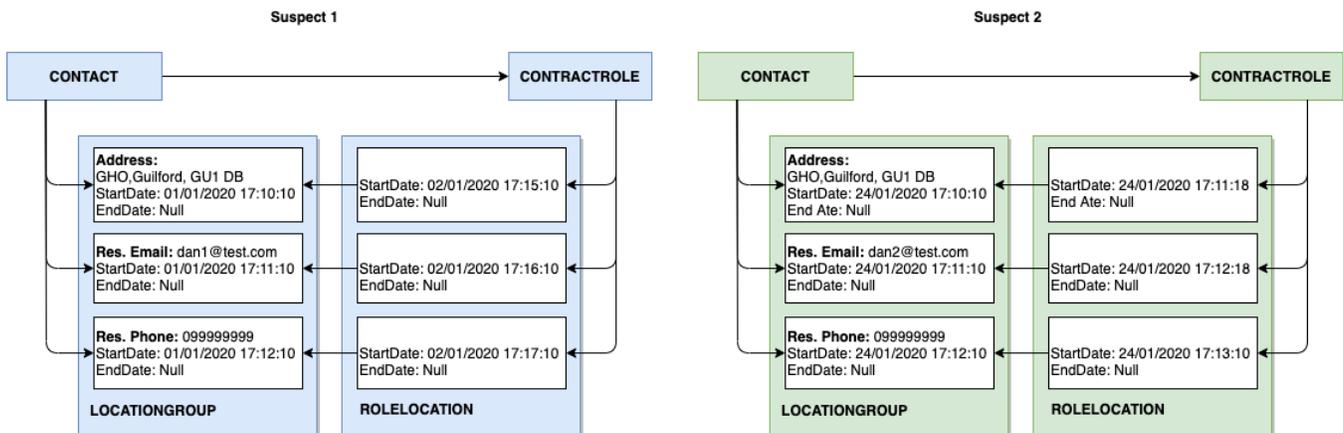
The page covers the default behaviour of contact points during MDM during Manual Merge (Collapse) performed from IBM Data stewardship Center(ISC). This also covers the issues identified during process.

The Process Outline

Whenever a new Party is added into MDM, the suspect duplicates process is triggered(if switched on) and compare the critical attributes to find if matching customer records exists already in the system. As a result of the process some records are flagged as suspects that needs to be resolved manually using IBM Stewardship Center(ISC). Subsequently a DataSteward with required privileges review the suspect records in ISC and decide whether the suspect needs to be merged to form a single Party or retain them as suspects, or no more a suspect. If the records are merged to form a single party record(called a Collapse in MDM terms), the associated child objects like Address, Contact Methods, Contract Roles, Role Locations etc. are also updated to reflect the relationship with the newly created Party record.

Suspects created in the system

The below diagram represent two suspects existing in MDM with the values of contact points and their relationship with Party(CONTACT) and Policy (CONTRACTROLE).

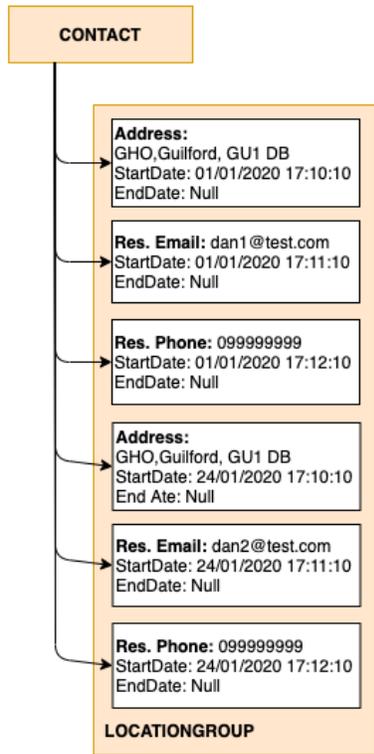


PS: The Location group and Role location have start dates

DataSteward review the suspects and request a Preview Collapse from ISC

The diagram below represent the consolidated party as suggested by MDM in the Preview Collapse response. Note that the Contract Role and Role Location objects are not part of the Preview Collapse response.

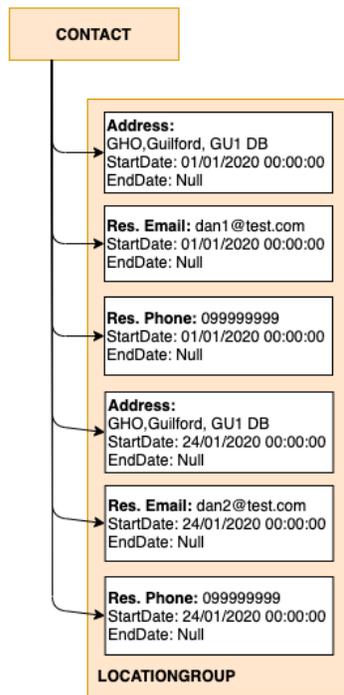
Preview Collapse MDM Response



Data steward collapse the records as suggested in the Preview

When the DataStewardGroup collapse the records, we have found a defect in the Collapse request where ISC trims off the timestamp from the start date. The request is as represented in the image below. Note that the Contract Role and Role Location objects are not part of the Collapse Party request.

Collapse Multiple Parties MDM Request



Validate: Duplicate Record Exists

At this stage MDM validates the requests for any duplicate records. The validation works on the basis of the definition of business key for the business objects : PartyAddressBObj and PartyContactMethodBObj. This is defined in the database table and the current definition are:

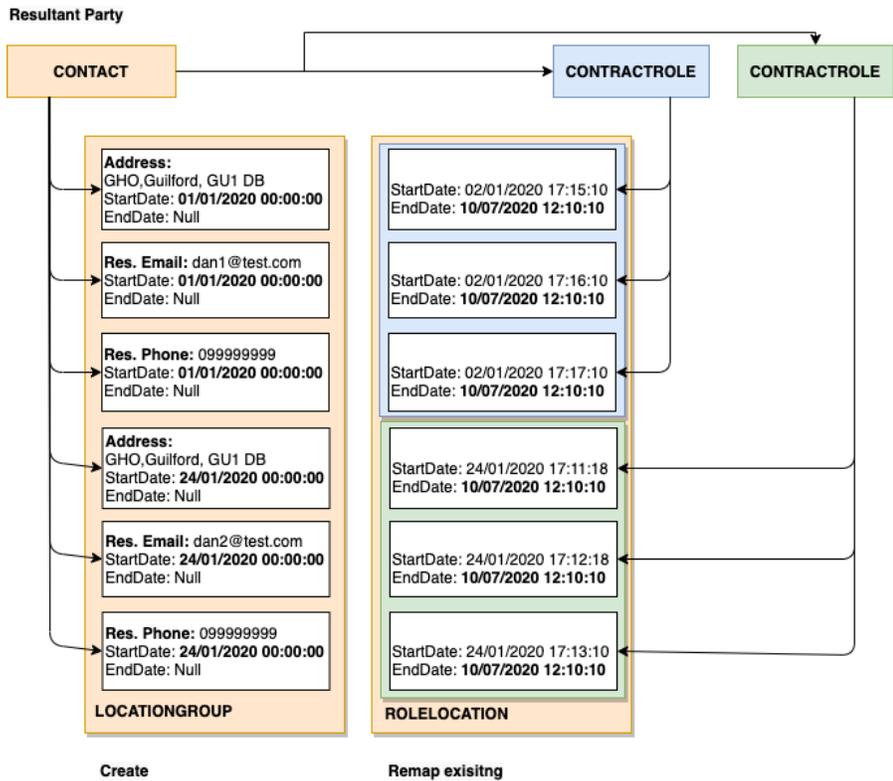
PartyAddressBObj(Address): AddressUsageType,StartDate,AddressID...
 PartyContactMethodBObj(Email,Phone): ContactMethodUsageType, StartDate,ContactMethodType,Value..

Note that the PartyAddressBObj has AddressID as candidate key in the definition because MDM always create a single address record when the values are same and AddressID is the primary key for the record. So verifying AddressID is effectively ensuring if the address is same of the Party.

Also note that as start date is part of the key definition, there could be two records with same values in the location group with differing start dates. **This could potentially be an issue if it is a duplicate in the enterprise view of the Party. If we need to resolve this we may need to remove the start date from the business key definition of PartyAddressBObj and PartyContactMethodBObj.**

A consolidated Party is created after Collapse

The new Party record created after the collapse is represented in the image below.



The issues and the reason why they occur

In this view we could see two issues:

Location group have start dates without timestamp that the old party records had: The reason is that ISC is not supplying the time values in the Collapse Party request for Address and Contact Method business objects. So MDM create the records as per the request.

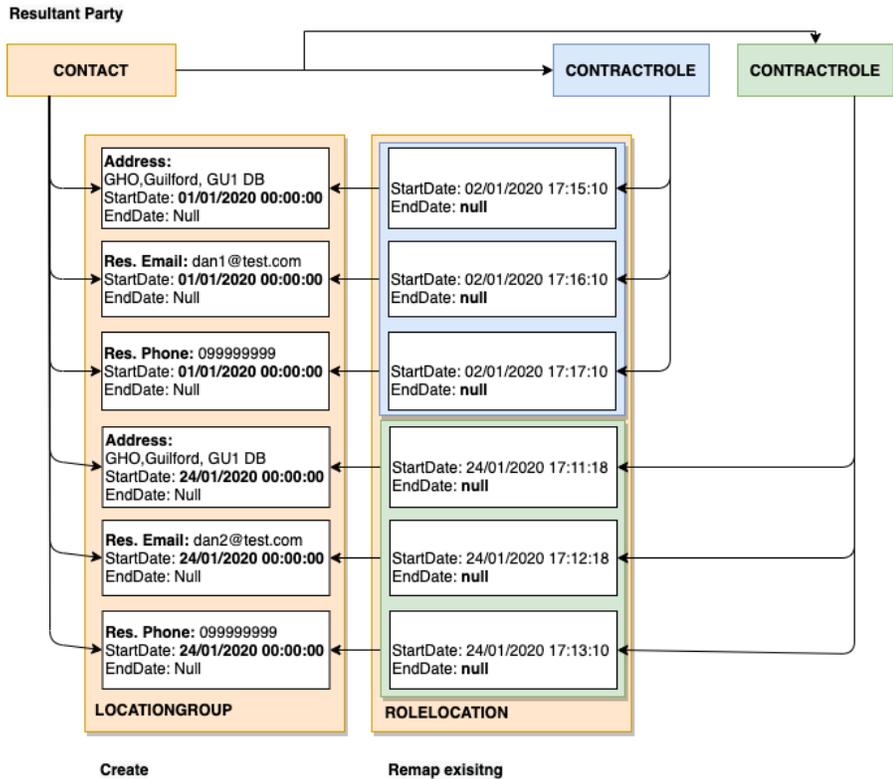
The role location objects are end dated and the relationship to the new location groups are broken: As we have seen, the Location Group objects are newly created for the new party so that they have new LocationGroupIDs. Also we have seen, the Role Location objects were not part of the original Collapse Party request. The behaviour of Contract Role and Role Location here are slightly different as they are not newly created but they are just reassigned or remapped to the new Party(cont_id) and Location Group objects. In order to reassign the Contract role, the cont_id attribute of CONTRACTROLE table gets updated to get it linked to the new Party. In order to make the Role Location objects point to the newly created location group objects(locationgroupid), the MDM logic use the business key strings below to compare the new Location Group objects with old location groups linked previously to the roles to identify if there is a relationship already exist or not. Note that these business keys are not built from the business key definition in the table but defined in the java external rule that take care the remapping process.

Address key string: <AddressUsageType>:<StartDate>:<CareOf>:<AddressID>
 Contact Method key string: <ContactMethodUsageType>:<StartDate><MessageSize>:<ContactMethodType>:<Value>

Both of these objects have StartDate in it . The old location group objects have the time stamp in start date but the new objects don't have. As a result it just end date the relationship thereby leaving the contract roles not linked to the newly created location groups.

This part of the logic is performed by an external rule called FSCollapseMultiplePartieseExtRule and IBM has suggested overriding its java implementation and modifying the business key string to remove the start date could resolve this.

It is observed that removing the start date from the business key string solve the role-location issue and restores the relationship with location group but the newly created location group have lost the timestamp in its start dates as in the image below. So we think that an ideal solution would be to fix the root cause in ISC that is sending StartDate without timestamp.



Summary

The issues identified and their solutions identified are:

- Location group of the new Party after Callpase have start dates without timestamp**
 IBM to give a fix for this issue. If IBM unable to suggest fix and as it is required for PPCH MVP, we have to update the records with the original date values
- The role location objects are end dated and the relationship to the new location groups are broken**
 IBM to give a fix for this issue. If IBM unable to suggest fix and as it is required for PPCH MVP, we have to update the records with the original date values
- There could be duplicate location group records with differing start dates**

This seems to be due to the Business Key definition for PartyAddressBObj and PartyContactMethodObj in MDM Business key definition table. Remove the start date from this definition. PartyAddressBObj has start date OOOB. TCS included the start date for PartyContactMethodObj for creating new Location Group for every contract.