Using MDM 360 @ UMD

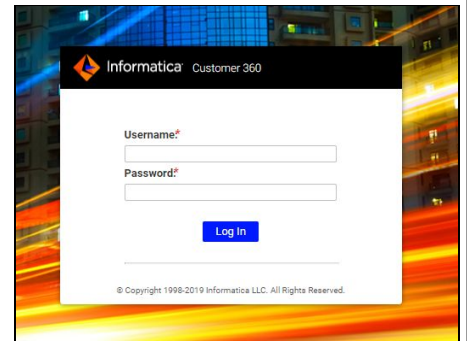Quick Start Guide

Table of contents:

Note: Tasks (starting at section 4.0) are only available to the data stewards of the source systems providing data to the MDM system (currently SIS & PHR).

1.0 Getting Started

- You will need to be connected to the **UMAccess-MFA** group in the VPN tool to log into the system (your first password is your normal one, the second password is "push" without quotes).

- Log in with your regular username and password using the links below.

- If you cannot log-in, please see the **troubleshooting** section at the end of this document.

- Email mdmsupport@umd.edu if you still cannot log-in after reviewing the troubleshooting section, or if you need help using the system.

- For testing & training purposes, please use the 'QA' environment:

  https://informatica-mdm.it-**qa-**bi.aws.umd.edu:8443/c360/com.informatica.tools.mdm.web.auth/login
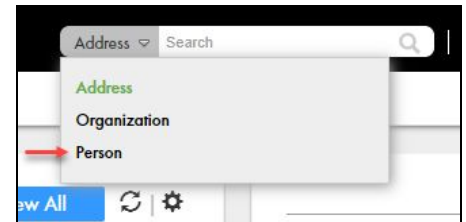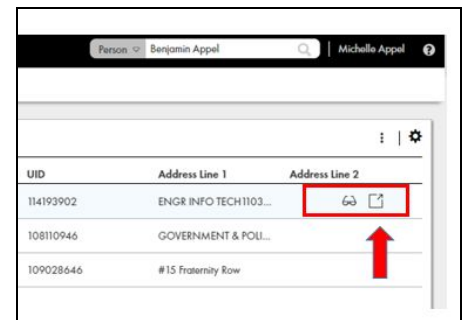
2.0 Quick Search

● In the top-right corner of the screen, change the search option from **Address** to **Person**. Quick Search will not return any results until this change is made.

● Enter a **UID** or **name** and hit return on your keyboard.

Note: Quick Search can search by name or UID, however, it is better at finding exact UIDs. If you have trouble finding a name, use the **Queries** tool below.


● Hover over the result record you are interested in. Click the **square-with-arrow** icon to open the record. The icon only appears **after** you hover over the record.

Note: Search results may return multiple records for the same person when a manual merge is outstanding. Once the merge is completed, they should be represented by only one search result record.
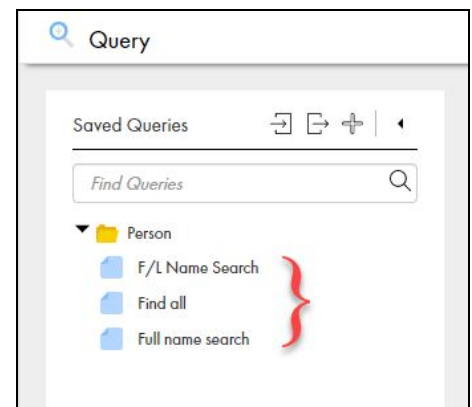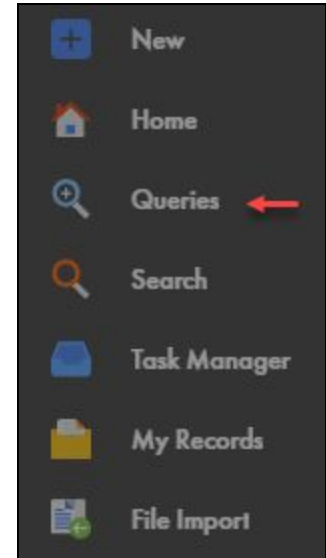

● You can return to your Quick Search results by using the **Search** button on the left-hand menu.
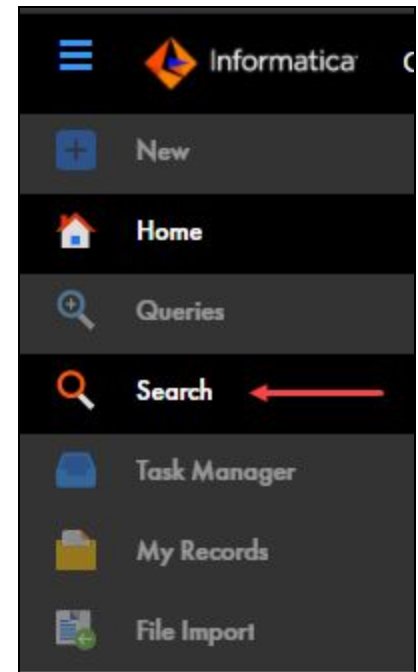
2.1 Advanced Search ("Queries")

- Select **Queries** from the left-hand menu.

- Look for a **Saved Query** such as "Basic Query" or "F/L Name Search".

- You can also create your own query using the plus sign (+), but that functionality is not covered by this manual.

- Enter the relevant search criteria and click **Run.**

- Advanced Search supports "wildcards" by either leaving a field blank, or using an asterisk (*).

- Results are displayed in the same manner as Quick Search above. Look for the **square-with-arrow** icon to open a record.

- You can return to your query results by using the **Queries** button on the left-hand menu.
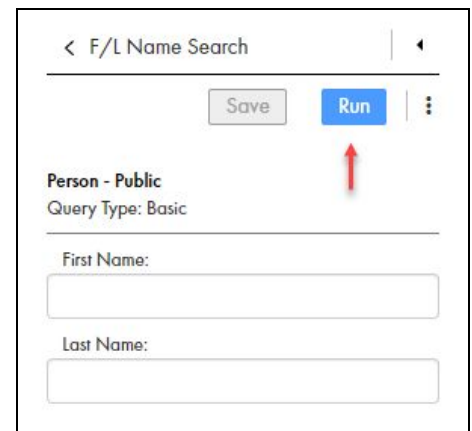
3.0 Navigating Person Records

- Person records found via the search instructions above will normally open on the **Dashboard** view. However, if you change the view, new records may open on your last-used view.

- Person records can be displayed using six views. Not all views will be available to all users.

Note: Views cannot be selected or changed until **after** you have opened a person record.

- The views are:

    ○ **Dashboard** - Simple overview

    ○ **Person Details** - Complete record

    ○ **Matching Records** - Preview potential matches or create a new match

    ○ **Cross Reference Records** - Shows which source systems the "golden" record was generated from

    ○ **History** - Shows when updates were made to the record

    ○ **Hierarchy** - Not currently used, may not be displayed

Note: Several of these screens look very similar, so it can be helpful to double-check which screen you are on, in order to understand what functionality to expect.
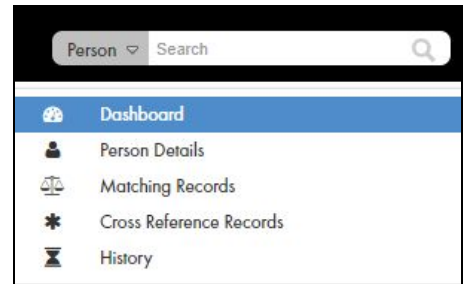
- You can jump between recently opened records using the left-hand menu. The recent record history is cleared when your session expires or you reload the page.
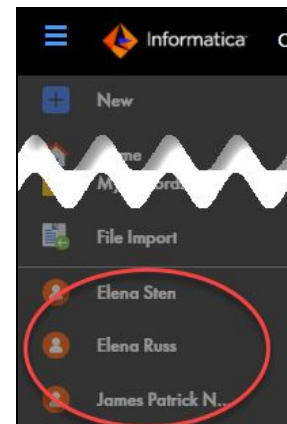
3.1 Person Details View

- We recommend using the **Person Details** view to review a record in detail.

3.2 Cross Reference View

- The **Cross Reference Records** (or "xref") view shows the system from which information was selected.

- In certain views, including xref, different parts of the records are collapsed in a tree-like structure.

Note: If an update comes into an existing source column, it won't get it's own new column. Instead, the existing source column will be updated directly, show the most recent details, and the old information will be moved to the history tab.

3.3 Matching Records View

- In most cases, we recommend using the **Task Manager** tool to review pending matches. However, there are a few reasons you might want to use the **Matching Records** view instead.

    - You may not have access to tasks.

    - You may want to check to see if there are any matches pending without leaving a record you are already on.

    - You can't easily search through tasks. Matching Records is available for any record you search for normally.

    - The task may not be created yet.

- The first two columns are the merge preview, and current record, respectively. Three or more columns indicate an additional record is suggested to merge.

- Yellow icons indicate that a manual match task has been created in the Task Manager.

Note: Only so many match **tasks** get created at any one time. There can be suggested matches in the **Matching Records** view **before** a task is created in the **Task Manager**.

- You can manually search for additional records to merge from this screen, but this functionality is not covered by this manual.
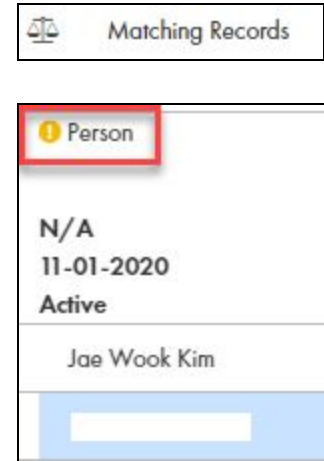
3.4 History View

- The **History** view shows when updates were made to the record.

- Remember that the **Cross Reference Records** view only shows the **most recent** information from **each** source (each source is represented by a column). The **History** view shows what changed, even within a single source, to get to the state of the current record.

- Remember to check the child records when navigating the **History View**.

4.0 Navigating Merge Tasks

- Select **Task Manager** on the left-hand menu.

- **My Open Tasks** is the default view.

- Using the drop down, select **All Unclaimed Tasks.**

Note: If you don't have any open claimed tasks, your task list will be empty until you select **All Unclaimed Tasks.**
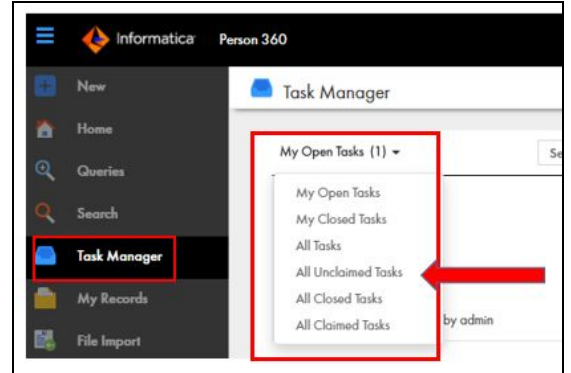
- When you are viewing an unclaimed task, you may click the **Claim** button to proceed.

- Once you claim a task, it will be added to your **My Open Tasks** list.

- When viewing a claimed task, the blue **Merge** button and other functionality will be enabled.

- The default view for a merge task is the **Overview** page.

- The "Merge Preview" column indicates what the new merged record will look like.
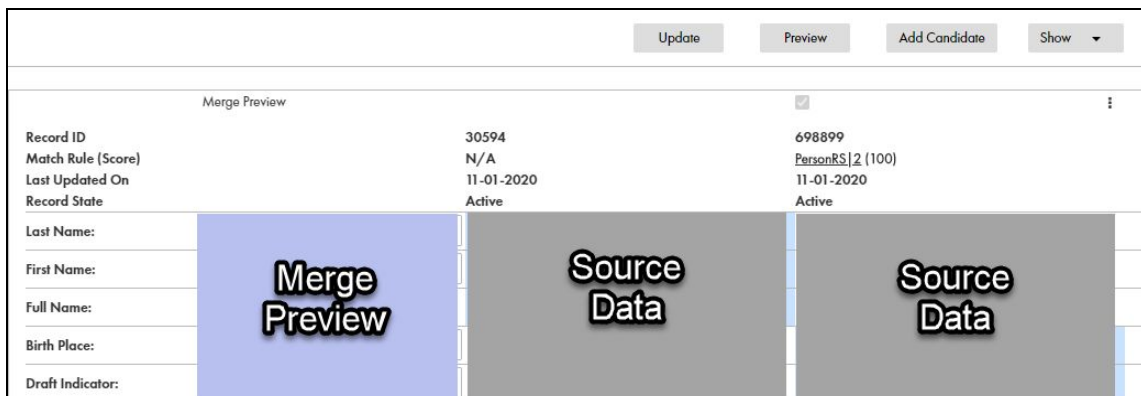
Note: Tasks are only available to the data stewards of the source systems providing data to the MDM system.

Page 9

4.1 Understanding Merge Tasks

- The blue highlighting indicates which record the "Merge Preview" data came from.

- Some fields will let you change which column is highlighted by clicking on the other column.

- You can also enter a new value in the Merge Preview column. Press **Enter** on your keyboard to save your change.

- Press the **Update** button to save any changes you made on this page.

Note: Be sure to press Enter after text changes, and the Update button after any changes, otherwise your changes will **not** be saved.
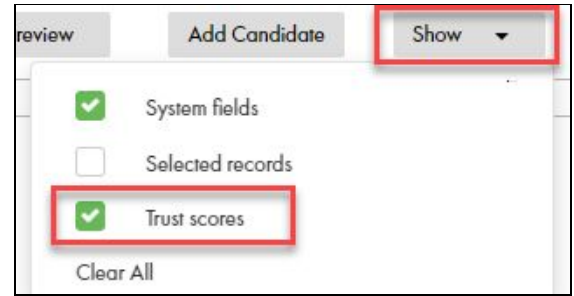
Note: Tasks are only available to the data stewards of the
source systems providing data to the MDM system.

Page 10

- You can use the **Show** drop-down button to reveal additional information:

- **Trust Scores** turns on the display of trust scores on specific fields where they have been calculated.

Note: Trust scores are only visible from the **Overview** section.

- **System Fields** displays additional rows, such as the system a source record (column) came from.

Note: Records won't always be from a single system. For example, an update from SIS might match with a record that was already merged between SIS & PHR.

Note: Tasks are only available to the data stewards of the source systems providing data to the MDM system.

Page 11
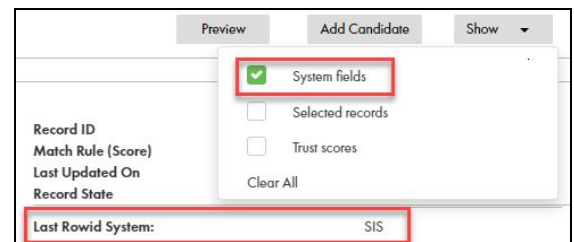
4.2 Child Records in Tasks

- Be sure to review each of the "child" records in the tree-menu. For example, multiple names or addresses.

Note: Child records behave differently than how the initial **Overview** page works. It is also different from how automatic merges work.
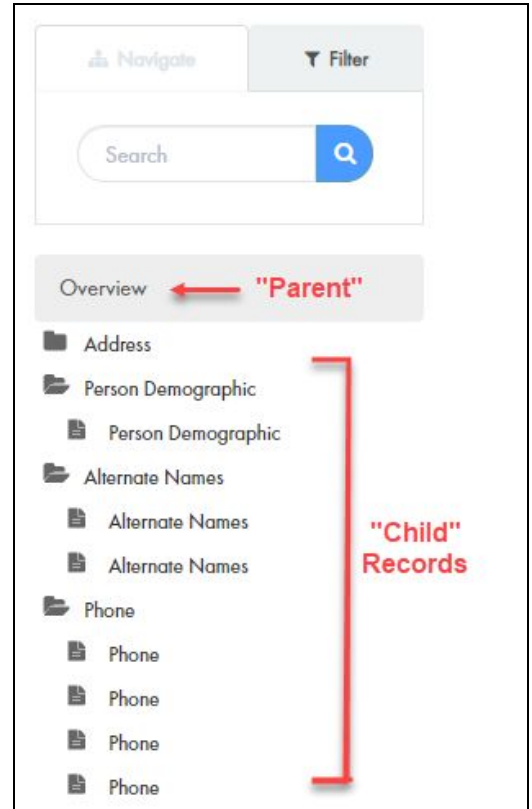
- By default, each child record is allowed to persist (i.e. "survive") as its own record.

- Click a check-box to select one or more potential merge options to be merged with the **current record** (represented by the first column after the merge preview).

- The number of records in the tree structure are decreased by the number of check marks you select, representing the combination of multiple records into one record.

- Ignore columns that have an un-checked box, as they will not be merged.

Note: You may need to scroll to the right to see multiple columns.

- The system will automatically select records for each field (represented by the blue highlight). Unlike the overview page, you cannot change these selections. If you do not agree with the selection, you must manually type the desired values.

- As above, you must click Enter on your keyboard **and** the Update button or your changes will not be saved.

Note: Tasks are only available to the data stewards of the
source systems providing data to the MDM system.

Page 12

4.3 Child Record Merge Example

- The two **Primary Name** child records will be merged.

- The **Payroll Name** will not be merged.

- The system has selected the fields from the current record (first column after the Merge Preview) to survive, but this will not always be the case. It may select the checked record, or a mix.

Note: The full **Alternate Name** field is separate from the **First Name** and **Last Name** fields. Carefully review the Merge Preview to make sure that the various name components have not become out-of-sync.

Note: Tasks are only available to the data stewards of the
source systems providing data to the MDM system.

Page 13

4.4 Completing a Merge Task

- When you are satisfied with all aspects of the merge (including the Overview **and** child records), click the blue **Merge** button.

- If you believe the two records should **NOT** be merged, click the blue **Cancel** button to the right of the **Merge** button.

- If you believe someone else should review the record, click the **More Actions** button and **Disclaim** the task. We suggest you make a note of the UID and email the appropriate data steward so that they can claim the task.
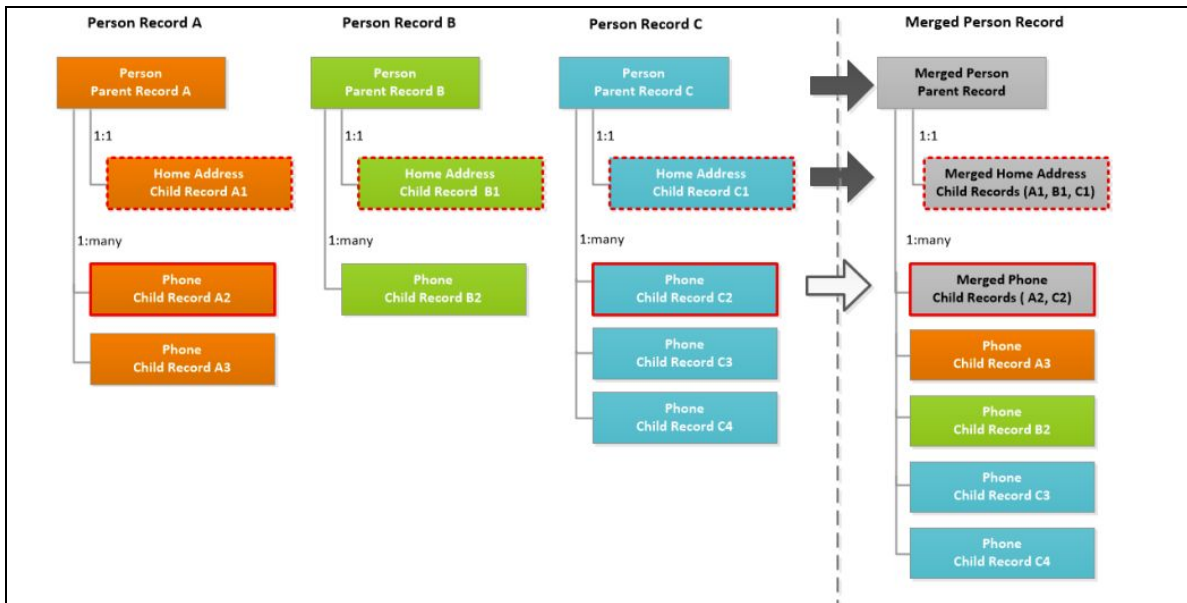
Note: Tasks are only available to the data stewards of the source systems providing data to the MDM system.

Page 14

4.5 Merge Tips & Tricks

Draft Indicator:	N	N
Birth Date:	10-14-2001	02-13-1991
ImageUrl:		
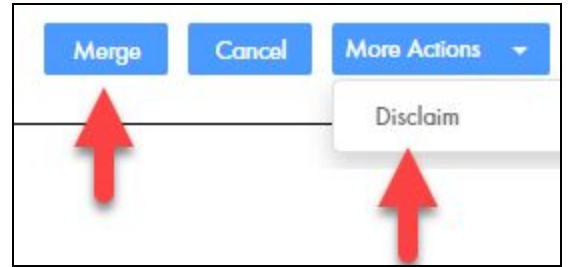
- Compare birthdays first to quickly see if it is an erroneous match (often due to similar names).

- Don't forget to use the **Show System Columns** feature explained above to see the source system.

- Don't forget to press Enter after text changes **and** the Update button after any changes.

- Don't forget that the **Matching Records** view of the person record looks similar, but behaves differently than the **Task Manager** view of a merge task. This section (4.x) is for completing merge actions from the Task Manager view.

- Consider this generic merge diagram with three parent records and a mix of child records selected to merge and/or not merge

Note: Tasks are only available to the data stewards of the source systems providing data to the MDM system.

Page 15

T.0 Troubleshooting

- If you see a log-in screen, but you cannot log-in with your UMD Directory ID & Password, it is most likely an account issue

- If you believe you already have an account, email mdmsupport@umd.edu.

- If you **do not reach a log-in page at all**, it is most likely a VPN issue

- See screenshot for what VPN-type error looks like (no log-in screen)

- Confirm that you are logged in to the VPN tool (Cisco AnyConnect)

- Confirm that you are logged-in the right VPN group (UMaccess-MFA)

- See this VPN Connection Instructions help article for more information

- Your "Second Password" is either

  - The word "push" (this will push a DUO request to your phone)

  - Or enter the numerical code from your DUO token

- If these instructions do not work, please email mdmsupport@umd.edu. It is possible that you need to be added to a particular VPN permission group and/or other configuration changes may be required.