

AGIIS Enhancements 2011

AGIIS License Unique Key Change and License Reload (PCR182-2)

12/5/2011

This recommendation changed the definition of the unique license key in AGIIS which enables the system to more easily resolve duplicate entity records with licenses. All existing licenses were removed from AGIIS and companies that have loaded licenses into AGIIS reloaded their licenses on December 2, 2011.

Subscriber Impact

The GLN/license relationship may have changed. Subscribers who use license information from AGIIS (in the form of extract, web service, etc) should follow the steps below.

Actions Required

1. Subscriber ACTION: Subscribers should create a License Extract prior to 12/2/2011. (Instructions were provided)
2. Subscriber ACTION: Subscribers should create another License Extract after 12/5/2011
 - a. Compare the “before 12/2/2011” license extract to the “after 12/5/2011” extract to identify licenses that no longer exist on entities in your subset.
 - b. Search AGIIS to determine if the license has been assigned to another similar or related entity record and add that entity to your subset (so you will be able to get updates about the entity and the license).

AGIIS Substandard Data Edits and Entity Inactivation (PCR 182-1)

11/25/2011

Sub-standard Data Edits and Entity Inactivation are two phases in the De-duplication recommendation. The first phase is the addition of Sub-standard data edits which encompass entities with addresses that do not meet USPS standards and do not contain the address edit override flag and entities that contain unauthorized terms, words or symbols within the name or address fields. These new edits were added to the system on November 11, 2011. The second phase was the substandard data processing which inactivated sub-standard data in the AGIIS database. The processing took place Thanksgiving weekend (11/24/2011 – 11/27/11).

Phase 1 -Substandard Data Edits

It is important to eliminate substandard data where possible. Substandard data is data that does not meet current AGIIS business rules or does not meet the new standard for data in AGIIS. Substandard data prevents accurate search results and entity matching in AGIIS. The substandard data existed in either the “name” or “address” demographics.

Entities with substandard “address” data are entities with invalid addresses that do not have the Address Override flag. In November of 2009, an address standardization process was done to all addresses with a 5 digit zip code (standardized zip codes have 9 digits), so as many

addresses as possible were updated programmatically. The remaining records with invalid addresses (5 digit zip codes) and no address override flag were considered substandard data.

Entities with substandard "name" data are entities with names containing data that does not pass the new data edits. In order to allow valid names into but prevent substandard name data from entering AGIIS, a "Name Edit Override" flag was added to AGIIS on November 11. If you update or add a record that does not pass the name edits and the name is a valid entity name, you may click the "Name Edit Override" flag to submit the request to the Directory Administrator (DA) for review. If the name is found to be valid, your request will be accepted. If the DA determines that the name contains substandard data, the request will be declined. Records with the "Name Edit Override" will not be reviewed in future substandard data processing/inactivation.

On November 11, 2010, the new edits were applied to AGIIS to prevent substandard data from entering the system using the website or bulk load processes. Any existing records that contain substandard data may be updated and the substandard data removed to meet the new standards and prevent the record from being inactivated during the Substandard Data Processing phase of the project.

Phase 2 - Substandard Data Processing (11/24/2011 – 11/27/11)

All entity records in AGIIS were edited using the existing and new entity edits. Those records that did not pass the edits were inactivated over Thanksgiving weekend of 11/24/2011 – 11/27/11. Subscribers were notified of the records in their subset that are inactivated by their EBID Update Extract and GLN Update Extract files. Inactive records in AGIIS are not valid for use.

AGIIS Web Services Upgrade and Entity Subset Extracts (PCR 173 & PCR 181)

10/17/2011

The AGIIS Directory Oversight Committee approved two enhancements to AGIIS:

Web Services Upgrade

All existing web services were replaced with a new set that conforms to the AgGateway Generic Web Services guidelines. The new web services resulted in (1) an elimination of the AGIIS client side cookie, (2) use of WS-Security Username Token Profile in the SOAP Header for the user and password authentication, and (3) use of independent XML schema definitions for all input and output data payloads.

The new web services were supported in parallel with the old web services for a period of three (3) months, after which the old web services were retired (no longer supported).

Entity Subset Extracts

This enhancement is beneficial for all AGIIS Subscribers who maintain an AGIIS entity subset. The functionality enables users to request a file containing all of the entities in their EBID and /or GLN subset (privilege requirements). From the AGIIS website, you fill out a form by selecting

the type of extract (EBID or GLN), file format (XML or ASCII), and supply email addresses for the file completion notifications. When the file has been created, it is saved on the AGIIS FTP in a folder specific to the subscriber and type of extract. The email completion notification will inform you that the file is available and will contain instruction for down-loading from the FTP.

In the past, users were required to request a subset extract from the AGIIS Help Desk. The file was manually created and delivered to the subscriber. The subscriber was limited to one EBID and one GLN subset extract per year. If additional subset extracts were need there was a fee for the extra file(s). With the new functionality, subscribers are not limited to the number of entity subset extracts they receive and no additional fee will apply.

New and updated tutorials along with Help for this page provide additional information about creating subset extracts.

Edit for Entity Add Requests to Detect Duplicates (PCR 166)

2/25/2011

The AGIIS Directory has been enhanced to improve duplicate entity detection during the entity Add process using the AGIIS website.

Changes for EBID ADD Requests & Update Requests for GLN only or GLN & EBID

When submitting an EBID Add request or an Update request (GLN or GLN + EBID) on the AGIIS website, the system will continue to display a Potential Duplicate List page as usual, but if the system detects (1) an existing record with an address that is an exact match to the request AND (2) the existing record has an entity name that “sounds like” a match to the request, the existing record will be highlighted in red and a warning message will be displayed: “Entities exist that exactly match the address and sound like the name of the entity you are about to add. Please carefully review the highlighted entries in the list to make sure your new entity does not already exist in AGIIS.”

- If the user determines that the highlighted entity is the entity they want, click on the entity name to bring up the View Entity page where the record can be added to the user’s subset. Note: If the existing entity is enumerated with only a GLN, add the entity to your EBID subset. This will bring up the “Submit Entity Update Request with EBID Enumeration” page, where you can provide the information required for EBID enumeration of the entity.
- If the user determines that the highlighted entity is NOT the entity they want, they would click the Continue button. The request will follow the normal process based on the identifier type/entity type.

Changes for GLN Add Requests

When submitting an Add request for a GLN identifier on the AGIIS website, the system will continue to display a Potential Duplicate List page as usual, but if the system detects (1) an existing record with an address that is an exact match to the request AND (2) the existing record

has an entity name that “sounds like” a match to the request, the existing record will be highlighted in red and a warning message will be displayed: “Entities exist that exactly match the address and sound like the name of the entity you are about to add. Please carefully review the highlighted entries in the list to make sure your new entity does not already exist in AGIIS. Note that clicking the Continue button will result in the review of your add request by the AGIIS Help Desk. (Please note that the add request will no longer be automatically added!)”

- If the user determines that the highlighted entity is the entity they want, click on the entity name to bring up the View Entity page where the record can be added to the user’s subset.
- If the user determines that the highlighted entity is NOT the entity they want, they would click the Continue button. Instead of the record being added immediately to the directory as usual, an entity request will be sent to the AGIIS Help Desk for review. An email will be sent to the user with the details of the entity request.

Several times a day an automated process, using more sophisticated matching software like that used in the GLN bulk matching process, will be used to compare the requests to existing entity records. If this automated process determines that the requested entity is, after all, unique, the record will be added to AGIIS. If the automated process determines that the request is a match to an existing entity, the request will be manually reviewed by the AGIIS Help Desk. If the Help Desk determines that the requested entity is unique, the record will be added to the directory. If the Help Desk determines that the requested entity is a duplicate of an existing entity record, the request will be declined. An email will be sent to the user with the results of the request.

The AGIIS Help Desk’s request processing system has been modified to enable this type of request to be easily targeted for review. The goal is to process this type of request within 24 hours (weekdays).

License Extract Includes Proprietary Code

1/30/2011

License Extract data now includes the extracting subscriber’s entity proprietary code to enable users to more easily match the licensed entity information to the entity record in their internal systems.

In order for the subscriber’s proprietary code to be included in the extracted data, it was necessary to change a data element used in the license extract. The old format used the *PartnerIdentifier* data element which included the industry identifier value and the identifier type. The new format uses the *IndustryIdentifier* data element which includes the industry identifier, the identifier type and the subscriber’s proprietary code. This change required subscribers to change their internal systems to recognize the new data element if they use the License Extracts in an automated fashion or if they send License Import files into AGIIS.