



## iMDM Explorer

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## Introduction

One of the most important features of InfoSphere Master Data Management Server is the ability to expose all its functions as Web Services or REST Services. This allow external application to be integrated in real time with MDM Server.

iMDM Explorer is a iOS application developed in order to demonstrate how the most common MDM operation can be performed on a Mobile device connected to a MDM Server instance deployed on Cloud:

- search for entities,
- display entities details,
- display relationships between entities,
- display records and record details,
- add new record,
- edit records
- delete records.

iMDM Explorer runs on iPhone and iPad with iOS 10 or higher.

## Installation and setup

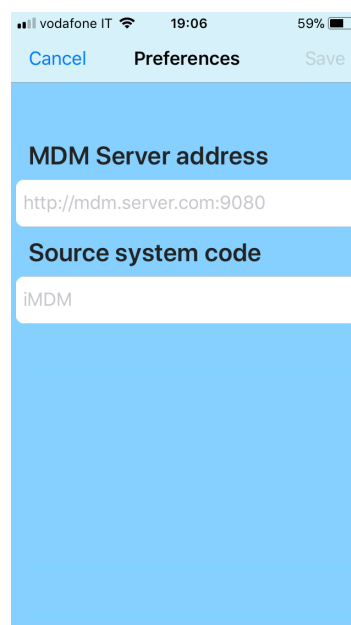
iMDM Explorer can be installed from IBM AppStore. The name of the application is iMDM.

Before starting the app, it's necessary to prepare a MDM Server Standard Edition instance. The app works on the Enterprise project of the image MDM SE/AE v11.6 FP2 (or FP3) that can be downloaded from ZACS or provisioned on Cloud Concierge. After deploying the image and starting the WAS instance, REST services must be installed . At this link the detailed instructions:

<https://ibm.box.com/s/2y3q20vpzh0cbhs8s7tmpf3uit1xb11l>

Please make shure that the VM running MDM can be reached by the iOS device and tap on iMDM icon.

When started for the first time, the app brings the user to Preferences Screen.



In this screen the user should:

- set the address of MDM Server instance he wants to access
- set the Source System Code for the new added records

The address of the server is mandatory. If not set, it is not possible to save preferences and move forward in the app. The server address is checked and the preferences can be saved only if a connection can be established.

The Source System Code for the new added records is not mandatory, but if not set the user won't be allowed to add new records. The Source System Code is checked and the preferences can be saved only if it corresponds to a Source System Code existing in the MDM Server Instance. Some existing codes are:

- EDW
- MKTG
- CL
- ENROLLMENT

In order to avoid conflict with existing records, it is recommended to define a Source System Code dedicated to iMDM Explorer app.

## Search for a Person

After saving the preferences, the Search MDM screen appears. This screen allows to:

- go to "Add New Record" screen, tapping on the "Add" symbol in the top left corner
- go to "Preferences Screen" tapping on the "Edit" symbol in the top right corner
- type search criteria and submit the search

The screenshot shows a mobile application interface for searching MDM records. The status bar at the top indicates 'vodafone IT', signal strength, Wi-Fi, time '11:48', and battery '89%'. The app header is light blue with a '+' icon on the left, the title 'MDM Search' in the center, and a pencil icon on the right. The main content area has a light blue background and contains five search criteria sections, each with a white input field: 'Person Names' (two fields, one with 'robert' and one with 'potter'), 'Birth Date' (one field), 'Zip Code' (one field), and 'SSN' (one field). A blue 'Search' button is located at the bottom center of the form.

If some error occurs, a red error label will inform the user.

Browse search results and select the Person to display

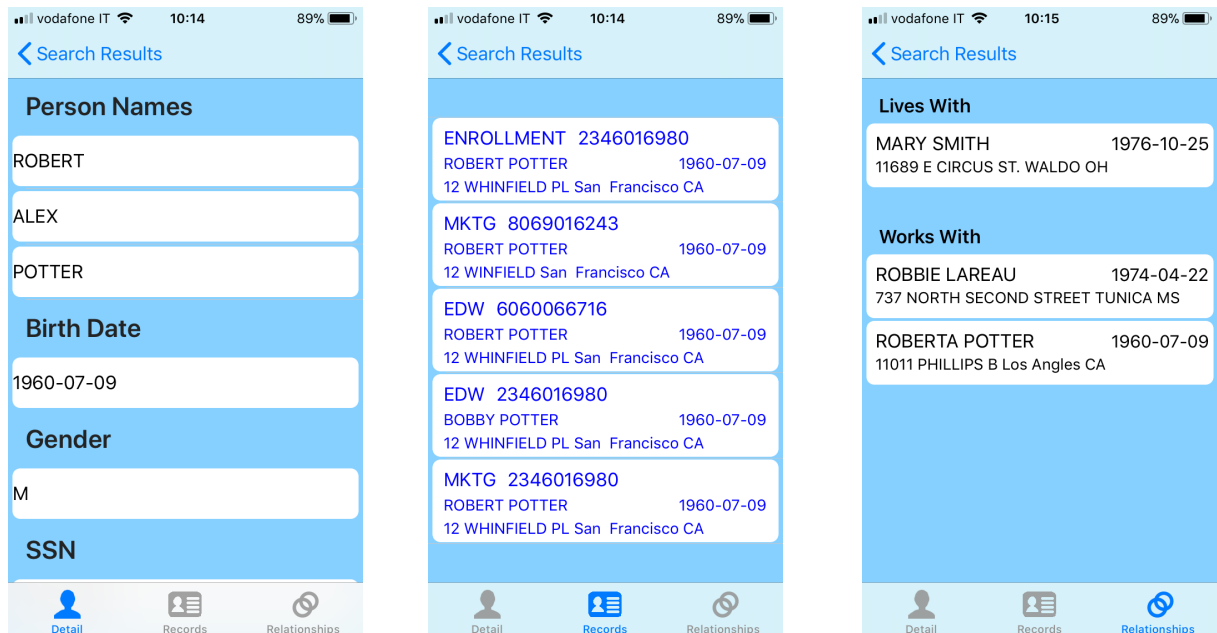
The results of the search will be displayed as a list.



The list can be updated dragging to the bottom. It should be done when coming back to this screen after editing a record.

Tapping on an item will bring to the following screen.

## Person Details



This screen allows the user to browse the person details. Three sections are available using the Tab Bar Items:

**Person Details:** this section displays the “golden record” of the person, built using the Entity Most Current Attributes view configured in the MDM Server instance. Tapping on the address a map appears showing the position. This occurs only if it’s a valid address. Tapping on the home phone number, a phone call starts. Tapping on the mobile phone number, it’s possible to select to send a SMS or to start a phone call.

**Person Records List:** a list displaying the list of records MDM uses to define the Person entity. Tapping on a record, will bring to the Record Details screen. From this section, a record can be deleted, dragging the record to the left.

**Person Relationships:** the list of relationships of the Person of the type “Lives with” and “Works with” as they are configured in the MDM instance.

## Record Details and Edit Record

Tapping on a record item, will bring to user to the Record Detail screen. This screen is similar to Person Details screen, but contains the details of the record, not of the Entity.

The screenshot shows a mobile app interface for a record detail. At the top, there's a status bar with 'vodafone IT', signal strength, time '10:15', and battery '89%'. Below the status bar is a header bar with a back arrow, the text 'ENROLLMENT 2346016980', and an 'Edit' button. The main content area has a light blue background with white text. It starts with a section header 'Person Names' followed by two input fields containing 'ROBERT' and 'POTTER'. Below that is a section header 'Birth Date' followed by an input field containing '1960-07-09'. Then a section header 'Gender' followed by an input field containing 'M'. Next is a section header 'SSN' followed by an input field containing '952169663'. Finally, there's a section header 'Home Address' at the bottom.

Tapping on Edit button, the Edit Record screen appears and the user can modify the record. The attributes can be changed or deleted. The following attributes are mandatory and the record cannot be saved if one of them is not present: First Name, Last Name, Street name. Tapping on the Birth Date field, a date picker appears for date selection.

Tapping the Save button will bring back to Record Detail screen that will display the updated record. After editing record and when navigating back to Search Result screen, the Result Screen should be updated dragging to the bottom, in order to reflect the new situation.

The screenshot shows a mobile app interface for an edit record screen. At the top, there's a status bar with 'vodafone IT', signal strength, time '10:15', and battery '89%'. Below the status bar is a header bar with a back arrow, the text 'Add Record', and a 'Save' button. The main content area has a light blue background with white text. It starts with a section header 'Person Names' followed by four input fields: 'Prefix', 'ROBERT' (with a delete icon), 'Middle Name', 'POTTER' (with a delete icon), and 'Suffix'. Below that is a section header 'Birth Date' followed by an input field containing '1960-07-09'. Below the input field is a date picker showing a grid of months and years. The grid has columns for months (May, June, July, August, September) and rows for years (1958, 1959, 1960, 1961, 1962). The '9 July 1960' option is highlighted. Finally, there's a section header 'Gender' at the bottom.

## Add Record

From the Search for a Person screen, tapping the Add symbol at top left corner will bring to Add Record screen. The function is available only if a Source System Code has been configured in Preferences. Using this screen, a new record can be added to MDM.

The screenshot shows a mobile application interface for adding a record. At the top, there is a status bar with 'vodafone IT', '17:04', and '36%' battery. Below the status bar is a navigation bar with a blue back arrow, the text 'Add Record', and a 'Save' button. The form is divided into sections with blue headers:

- Person Names**: Contains three text input fields labeled 'Middle Name', 'Last Name (mandatory field)', and 'Suffix'.
- Birth Date**: Contains a date picker showing '1968-10-06'. Below the date picker is a table with columns for day, month, and year.
- Gender**: Contains a text input field labeled 'Gender'.
- SSN**: Contains a text input field labeled 'SSN'.

	Month	Year
4	August	1966
5	September	1967
6	October	1968
7	November	1969
8	December	1970

The mandatory field are: First Name, Last Name and Street name. If one of them is not present, the record cannot be saved. Tapping on the Birth Date field, a date picker appears for date selection.

## Typical presentation Use Case

iMDM Explorer can be used for demoing MDM Server Standard Edition. The demo can follow the same use case used when navigating with Inspector and exploiting the unique capabilities of the mobile environment: displaying an address on the map and starting a phone call.

- Start the demo with the app already configured to connect to an existing MDM instance, with an existing Source System Code
- Add a new record, using Robert Potter; birth date 19600709; address: 12 winfield Pl, San Francisco, USA; phone number: use the phone number of a person present to the demo
- Search for the Person: Robert Potter, birth date: 19600709
- Show the list of results and explain the meaning of the score
- Tap on item (Robert Potter) and explain the Person Detail, Person Record List and Person Relationships.
- Tap on the address and show it on the map
- Tap on the phone number and show how to start a phone call to the mobile phone added at the beginning
- Go to the record list, tap on one record to show the details
- Edit the record, changing some attributes (i.e. change Robert to Rob and the birth date)
- Go back to record details and show the updated record
- Go back to Search Results and drag the list to the bottom. The Robert Potter item will be updated the the new values. This is the opportunity to explain how MDM SE works and that the results displayed are based on the Entity Most Current Attributes.

## Feedback, bug report and enhancement requests

Please feel free to provide feedbacks on the app and to request enhancements, by contacting: [fabio\\_vettore@it.ibm.com](mailto:fabio_vettore@it.ibm.com)