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Usage Guide:

Name Checker Utility v1.6

CMS Central Data Administration

Change Log

Version	Author	Date	Revision
1.0	C.Woodard	12/19/2007	Original Document Partial Draft
1.01	C.Woodard	12/24/2007	Revised steps to correspond with modifications to tool behavior.
1.02	C.Woodard	12/28/2007	Updated version number of utility.
1.03	C.Woodard	01/04/2008	Updated version number of utility.
1.04	C. Woodard	02/11/2008	Corrected language about color shading of noncompliant terms.
1.05	C. Woodard	06/19/2008	Revised to require object class term as 1st term of attribute name.
1.06	C. Woodard	08/01/2008	Added sentence to caution users about invalid contents in Excel alternate startup folder. Corrected year on title page.
1.07	C. Woodard	08/15/2008	Revised to remove all references to the Excel alternate startup folder.
1.08	C. Woodard	02/06/2009	Revised to incorporate additional features of Name Checker v1.6.
1.09	C. Woodard	02/24/2009	Revised to incorporate additional features of Name Checker v1.6.
1.10	C. Woodard	03/31/2009	Edited Introduction. Added Support section with CDA contact information.

Table of Contents

Change Log	ii
Table of Contents	iii
1 Introduction	1
2 Name Checker Utility Usage Guide	1
2.1. Installing Name Checker	1
2.2. Executing Name Checker	2
2.2.1. Button Functions	3
2.3. Interpreting Name Checker Results	4
3 Support	5

1 Introduction

The Name Checker Utility is a tool which performs data name translation and data name compliance analysis. These two functions implement the CMS Data Administration Standards, Guidelines, and Operating Procedures as they apply to forming valid names of data entities, data attributes, database tables, and database columns. The tool employs the CMS Data Administration Glossary of Standard Terms and Abbreviations.

The Name Checker Utility will routinely be employed by data administrators or data modelers to verify the compliance of a set of data names against the CMS Data Administration standards. It may also be used to determine the correct abbreviation of a given business term, or to expand an abbreviated name into the corresponding business name.

Name Checker uses Microsoft Office and Visual Basic for Applications (VBA) technology to deliver its functionality. It is integrated into the familiar working environment of the user as a toolbar in Excel 2003. The tool is installed by clicking the link on the CMS Data Administration web page and then selecting "Open". The necessary files will be saved on the user's computer automatically as part of the installation process.

Name Checker processes a column of cells in an Excel worksheet, starting with the active cell which the user has selected by clicking and proceeds downward through that column, and stopping when the first empty cell is encountered. The tool creates a new worksheet in the workbook from which the tool was invoked to display the detailed results of the function.

2 Name Checker Utility Usage Guide

2.1. Installing Name Checker

Steps for installing Name Checker Utility v1.6 –

Open the Excel application from the Start Menu, or open any xls file.

Set the macro security for Excel on your machine to “Medium”.

Using the menu bar, select: Tools > Macro > Security to open the macro security dialog. On the “Security Level” tab, select the option Medium. Click OK to close the dialog.

Close any open workbooks and then close the Excel application itself.

Open the file “DataAdminTemplate_v1_6.xlt” from the ActioNet SharePoint website (ACE) by clicking on the Excel icon to the left of the template name and then click on the

“Open” button. When the security warning prompt appears, click on the **Enable Macros** button to allow code in the template to execute. The ACE folder location of the utility is:

<https://ace.actionnet.com/CMSDA/Team%20File%20Space/Forms/AllItems.aspx?RootFolder=%2fCMSDA%2fTeam%20File%20Space%2fCMS%20DA%20Tool%20Support%2fName%20Checker%20Utility%2fCurrent%20Version&FolderCTID=&View=%7b6BA22EEE%2dDEBB%2d4EB9%2dB406%2d3CD10E01A38C%7d>

A notification will appear if any other Data Administration template files already exist; they will be deleted. Click the OK button to continue. Any previous Data Administration toolbars will be removed.

A new toolbar will be created with the others at the top of the Excel window. This toolbar will have seven buttons, labeled v1.6, Using NEW Standards, SetStdTermFile, EntityCheck, AttrCheck, TblCheck, ColCheck, and ShowAllRows. The Excel application will close.

The template is now installed. You are now ready to open any xls, xml spreadsheet, or csv file with Excel and execute the Name Checker functions.

2.2. Executing Name Checker

After the template is installed you can open any xls, xml spreadsheet, or csv file with Excel and execute the Name Checker functions.

Name Checker processes a list of cells in an Excel worksheet from top to bottom. Indicate the top cell to be analyzed by selecting (clicking) on it. Avoid clicking on the column heading if one is present. When a function button is clicked Name Checker will proceed downward through the column with the selected cell and stop when the first empty cell is encountered.

You may be asked to select an existing standard terms list (glossary xls or csv file) from your hard drive, a network drive, or a URL as with a file in a SharePoint folder. The tool makes an attempt to verify that the file chosen has legitimate column headings for a standard terms list, but the integrity of the standards file is not guaranteed by Name Checker. Name Checker generally remembers the standards file last used and re-opens that file for subsequent executions.

Name Checker opens the selected (or remembered) standards file as another Excel workbook in the user’s Excel session. The tool makes modifications to the standards file for processing and then discards these changes and closes the standards file after completing a Name Checker function. Therefore, it is advisable to avoid editing or saving the standards file which has been opened by Name Checker.

A different standard terms list (glossary xls or csv file) can be designated by clicking the **SetStdTermFile** button on the Name Checker toolbar. Immediately after the tool is installed, there is no previous standard term file or folder name remembered. Other than the first execution of the tool after an installation, Name Checker will remember the folder location where the user last selected a standards file. Clicking the **SetStdTermFile** button will display the file selection dialog showing the remembered folder.

The Name Checker Utility operates in two standards enforcement modes –

- 1) using an “old” standard terms list and the standards logic in effect as of October 1, 2005, or
- 2) using a “new” standard terms list and the standards logic in effect after October 1, 2005.

The tool determines the operating mode based upon the name of the standards file being used – whether the file name contains the string “OLD” or “NEW”. The current operating mode is indicated by the second button in the Data Admin toolbar. This non-clickable button will either display the label “**Using NEW Stds**” and will appear as depressed, or it will display the label “**Using OLD Stds**” and will appear as raised.

The tool creates a new worksheet in the workbook from which the tool was invoked to display the detailed results of the function.

The Name Checker tool resides on the user’s machine as an Excel template (.xlt). It will load automatically the first time a Name Checker function button is clicked in a user’s Excel session. In some cases Excel will prompt the user to permit the macros to execute. When the security warning prompt appears, click on the **Enable Macros** button to allow the utility to execute. No additional objects are attached to the workbook containing the names being analyzed, apart from the results sheets described below in section 2.3. The tool creates several temporary worksheets in the user’s workbook during the execution of a Name Checker function and the tool removes them as the function terminates.

2.2.1. Button Functions

The leftmost button on the toolbar, labeled **v#.#**, simply indicates the installed version of the utility. Clicking on this button has no effect.

The second button, **SetStdTermFile**, permits the users to designate or change the standards file being used in subsequent executions.

The next four buttons in the toolbar initiate the Name Checker name translation/compliance functions at the Entity/Table level or the Attribute/Column level, translating from Logical to Physical names or from Physical to Logical names. Corresponding to their functions, the buttons are labeled **EntityCheck**, **AttrCheck**, **TblCheck**, and **ColCheck**.

EntityCheck analyzes entity names for compliance and translates from entity names to table names.

AttrCheck analyzes attribute names for compliance and translates from attribute names to column names.

TblCheck analyzes table names for compliance and translates from table names to entity names.

ColCheck analyzes column names for compliance and translates from column names to attribute names.

2.3. Interpreting Name Checker Results

Each execution of the Name Checker utility will create a new worksheet in your workbook to display the results of the compliance analysis and translation. The name of the new sheet will be “EntityNameCheck” or “AttrNameCheck” or “TableNameCheck” or “ColumnNameCheck”, according to the function performed. If needed, these sheet names will have digits appended to the name for uniqueness, e.g., “TableNameCheck2009225123054”.

The term parts are color coded in the results sheet.

In the leftmost column of the results sheet, red indicates a name with one or more errors, and green indicates a compliant name. A yellowish orange color indicates a term with warnings or an indeterminate compliance outcome.

In the tenth (J) column and beyond, the analysis results for the individual words making up the candidate name are displayed. Red indicates a word not found in the standards list, and green indicates an approved term. Approved (green) terms may be given another color based upon further analysis - a sky blue color indicates an approved representation term, and gray indicates an approved object class term.

By default, compliant term rows are hidden in order to draw attention initially to terms with errors or warnings. These terms and their results may be shown if desired by clicking the **ShowAllRows** button on the Data Admin toolbar, or by using the Format > Row > Unhide command on a selected range of rows spanning the hidden compliant terms you want to view.

The table below shows the available results columns and indicates with an “X” which columns will appear under which user selections of function and operating mode.

Function	Mode	Business Name	Object Class Term	Representation Term	Number of Words	Abbreviated Term	Abbrev Term Length	Abbrev Length > 18	Abbrev Length > 30	Term Errors and Warnings	Included words
EntityCheck	NEW	X	X		X	X	X	X	X	X	X
AttrCheck	NEW	X	X	X	X	X	X	X	X	X	X
TblCheck	NEW	X	X		X	X	X	X	X	X	X
ColCheck	NEW	X	X	X	X	X	X	X	X	X	X
EntityCheck	OLD	X			X	X	X	X	X	X	X
AttrCheck	OLD	X		X	X	X	X	X	X	X	X
TblCheck	OLD	X			X	X	X	X	X	X	X
ColCheck	OLD	X		X	X	X	X	X	X	X	X

At the bottom of the results the elapsed time of the run, the standards mode used, and the standards file used are reported.

3 Support

Should you have any comments or questions about using the NameChecker Utility, please send them by email to DataAdmin@cms.hhs.gov.