



BaseCAMP 2021
BONUS SLIDES!

COMANAGE MATCH

FEATURE SET IN SCREEN SHOTS

VERSION: Pre-release 2021

COMANAGE MATCH

- System for matching items
- Use directly in COmanage - match people as they are registered
- API to integrate with other systems

1. Define the attributes to be used for matching
2. Set up rules for matching (Canonical and Potential)
3. As items are evaluated, the rules are checked
 1. Items matching canonical rules > matching Reference ID
 2. Items matching none > new Reference ID
 3. Items matching potential rules flagged for manual review
4. UI for resolving potential matches

The screenshot shows the COmanage Match interface. The main heading is "Reconcile Unresolved Requests". Below this is a table with columns for "Reference ID" (173064d..., 173064d..., New) and "Attributes". The table lists various attributes such as id, sor, sorid, request_time, resolution_time, dob, lastname, firstname, ssn, and netid. The "lastname" row is highlighted with a yellow border, showing "Doyle" for the first two reference IDs and "Dayle" for the new one. A sidebar on the left contains navigation options like Matchgrid Settings, API Users, Attributes, Attribute Groups, Attribute Maps, Rules, and Systems of Record. The top right shows the user "admin".

dob	1991-11-22	1991-11-22	1991-11-22
lastname	Doyle	Doyle	Dayle
firstname	Tom	Thomas	Tommy
ssn	7107137986085	7107137986085	7107137986085

SELECT & CONFIGURE THE ATTRIBUTES

- Doesn't have to be about people
- Define attributes that are of similar quality across your sources
- Configure attributes – what constitutes a match?
 - How closely the need to match
 - Substring matches allowed?
 - Exact match required?
 - Attribute map to use...

CManage Match

admin

Matchgrid Settings > CManage Match > testgrid > Attributes

Attributes

[Add New Attribute](#)

Name	Attribute Group	Action
dob		Edit Delete
firstname	official	Edit Delete
lastname	official	Edit Delete
netid		Edit Delete
ssn		Edit Delete

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CManage Match > testgrid > Attributes > Edit firstname

Edit firstname

Name *
Value must be a valid SQL identifier, as it will be used to construct the matchgrid column name

Description

API Name *

Alphanumeric

Case Sensitive

Null Equivalents

Required

Search Distance

Search Exact

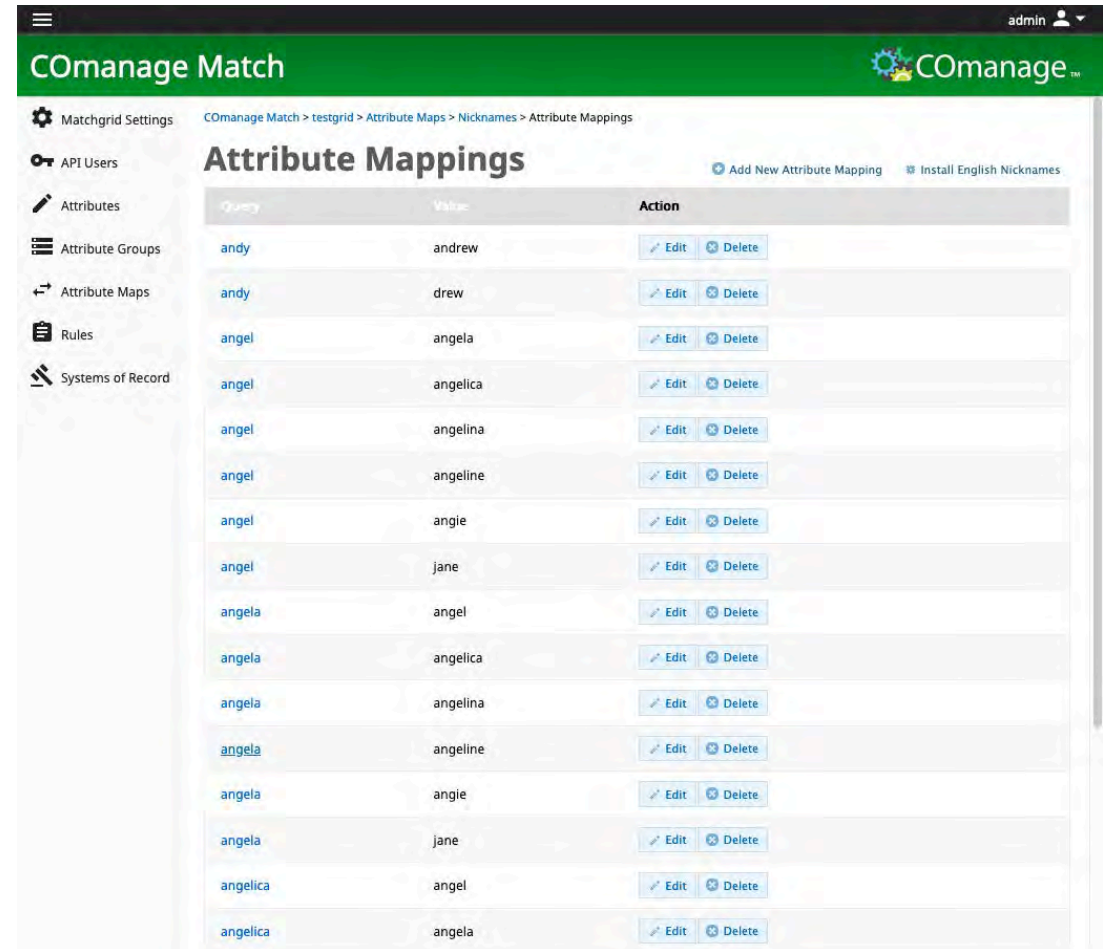
Search Substring From

Search Substring For

Attribute Map

ATTRIBUTE MAPS

- Maps of values that should be treated similarly
 - Nicknames
 - Updated names
 - Alternate names
- Different maps for different attributes



The screenshot shows the COmanage Match web interface. The top navigation bar is green with the COmanage logo and the text "COmanage Match". The user is logged in as "admin". The breadcrumb trail is "COmanage Match > testgrid > Attribute Maps > Nicknames > Attribute Mappings". The main heading is "Attribute Mappings". There are two buttons: "Add New Attribute Mapping" and "Install English Nicknames". The table below has three columns: "Query", "Value", and "Action".

Query	Value	Action
andy	andrew	Edit Delete
andy	drew	Edit Delete
angel	angela	Edit Delete
angel	angelica	Edit Delete
angel	angelina	Edit Delete
angel	angelina	Edit Delete
angel	angelina	Edit Delete
angel	angelina	Edit Delete
angel	angeline	Edit Delete
angel	angie	Edit Delete
angel	jane	Edit Delete
angela	angel	Edit Delete
angela	angelica	Edit Delete
angela	angelina	Edit Delete
angela	angelina	Edit Delete
angela	angeline	Edit Delete
angela	angie	Edit Delete
angela	jane	Edit Delete
angelica	angel	Edit Delete
angelica	angela	Edit Delete

CONFIGURE THE MATCHING RULES

- Create a set of rules
 - Canonical – if all rules are met, the records are a match
 - Potential – if at least one rule is met, the records are a potential match
 - None of the rules match? No match! A new record is needed.
- Decide the order the rules should be evaluated
- What attributes are considered?

The screenshot shows the COmanage Match interface. The top navigation bar is green with the COmanage logo and the text "COmanage Match". Below the navigation bar, there is a sidebar with icons for "Matchgrid Settings", "API Users", "Attributes", "Attribute Groups", "Attribute Maps", "Rules", and "Systems of Record". The main content area is titled "Rules" and contains a table with the following data:

Name	Confidence Mode	Order	Action
Rule C1	Canonical	1	Edit Delete
Rule C2	Canonical	2	Edit Delete
Rule P1	Potential	1	Edit Delete
Rule P2	Potential	2	Edit Delete

At the bottom right of the table, there is a link "Add New Rule". The footer of the page indicates "Page 1 of 1, Viewing 1-4 of 4".

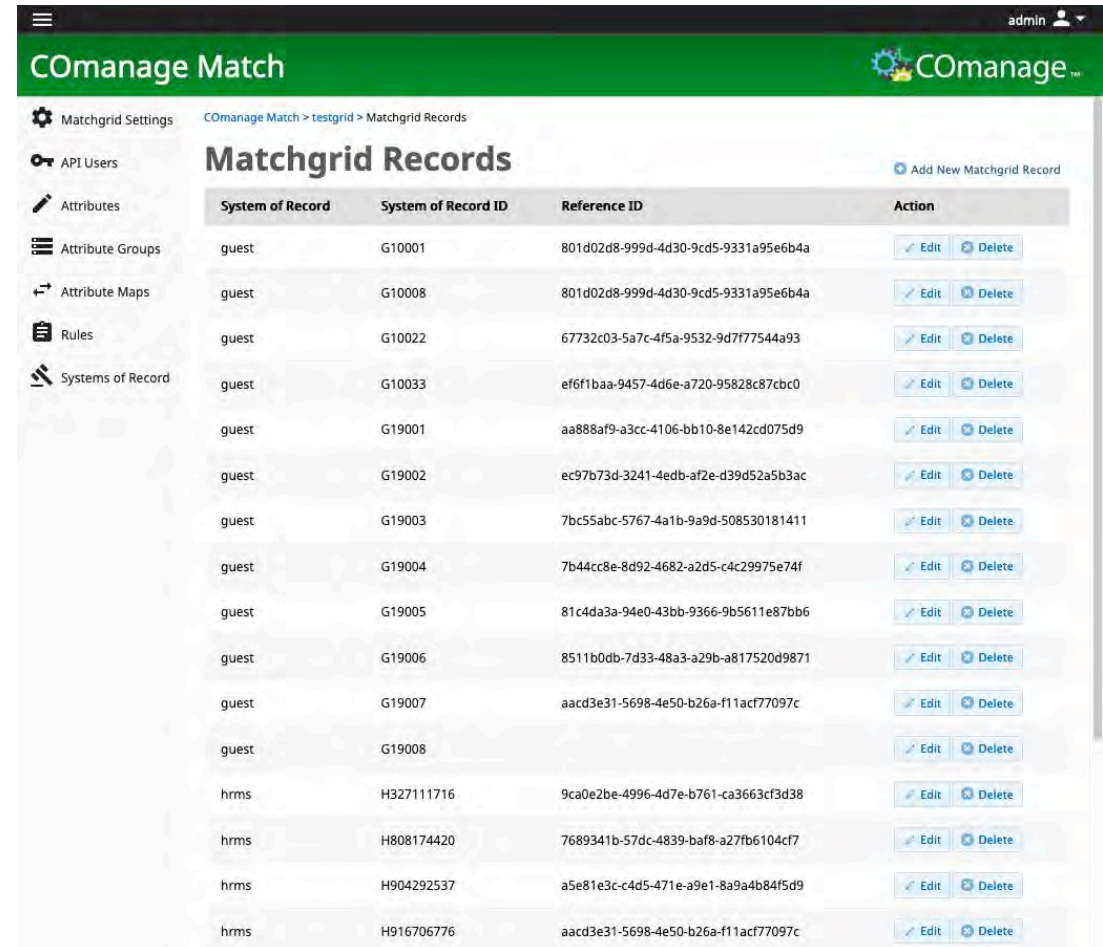
The screenshot shows the COmanage Match interface for editing a rule. The top navigation bar is green with the COmanage logo and the text "COmanage Match". Below the navigation bar, there is a sidebar with icons for "Matchgrid Settings", "API Users", "Attributes", "Attribute Groups", "Attribute Maps", "Rules", and "Systems of Record". The main content area is titled "Edit Rule C1" and contains a form with the following fields:

- Name ***: Rule C1
- Description**: (empty text field)
- Confidence Mode ***: Canonical
- Order ***: 1
- Search Types**: (empty text field)
- dob ***: Exact
- firstname ***: Substring
- lastname ***: Exact
- netid ***: Skip
- ssn ***: Exact

At the bottom of the form, there is a red asterisk note: "* Denotes Required Field" and a blue "SAVE" button.

EVALUATING THE RECORDS

- As evaluated, records are added to the “Matchgrid”
 - No ambiguity? Reference ID is assigned
 - Match – ID is that of matching record
 - No Match – New ID is assigned
 - Potential match? Reference ID is blank
- Reference IDs used by relying systems to prevent duplicates
- Potential matches are resolved manually



The screenshot shows the COmanage Match web interface. The top navigation bar is green with the COmanage logo and the text "COmanage Match". Below the navigation bar, there is a sidebar with a menu containing: Matchgrid Settings, API Users, Attributes, Attribute Groups, Attribute Maps, Rules, and Systems of Record. The main content area is titled "Matchgrid Records" and includes a link to "Add New Matchgrid Record". The table below contains the following data:

System of Record	System of Record ID	Reference ID	Action
guest	G10001	801d02d8-999d-4d30-9cd5-9331a95e6b4a	Edit Delete
guest	G10008	801d02d8-999d-4d30-9cd5-9331a95e6b4a	Edit Delete
guest	G10022	67732c03-5a7c-4f5a-9532-9d7f77544a93	Edit Delete
guest	G10033	ef6f1baa-9457-4d6e-a720-95828c87cbc0	Edit Delete
guest	G19001	aa888af9-a3cc-4106-bb10-8e142cd075d9	Edit Delete
guest	G19002	ec97b73d-3241-4edb-af2e-d39d52a5b3ac	Edit Delete
guest	G19003	7bc55abc-5767-4a1b-9a9d-508530181411	Edit Delete
guest	G19004	7b44cc8e-8d92-4682-a2d5-c4c29975e74f	Edit Delete
guest	G19005	81c4da3a-94e0-43bb-9366-9b5611e87bb6	Edit Delete
guest	G19006	8511b0db-7d33-48a3-a29b-a817520d9871	Edit Delete
guest	G19007	aacd3e31-5698-4e50-b26a-f11acf77097c	Edit Delete
guest	G19008		Edit Delete
hrms	H327111716	9ca0e2be-4996-4d7e-b761-ca3663cf3d38	Edit Delete
hrms	H808174420	7689341b-57dc-4839-baf8-a27fb6104cf7	Edit Delete
hrms	H904292537	a5e81e3c-c4d5-471e-a9e1-8a9a4b84f5d9	Edit Delete
hrms	H916706776	aacd3e31-5698-4e50-b26a-f11acf77097c	Edit Delete

RESOLVING POTENTIAL MATCHES

- Interface for reconciling potential matches
 - See group of potential matches
 - Select the matching record, or create a new one
 - System assigns a Reference ID based on your choice
- Information available via the API for use in other systems

The screenshot shows the COmanage Match interface. The header is green with the COmanage logo and 'admin' user. The left sidebar contains navigation items: Matchgrid Settings, API Users, Attributes, Attribute Groups, Attribute Maps, Rules, and Systems of Record. The main content area is titled 'Reconcile Unresolved Requests (testgrid)' and shows '3 Pending Matches'. A table lists the matches:

System of Record	System of Record ID	Request Time
sis	971194844	2019-03-21 00:32:33
sis	553815121	2019-10-27 12:43:55
guest	G19008	2020-02-16 10:07:46

Powered By COmanage

The screenshot shows the COmanage Match interface for a specific record comparison. The header is green with the COmanage logo and 'admin' user. The left sidebar is the same as the previous screenshot. The main content area is titled 'Reconcile Unresolved Requests' and shows a comparison of two records for Reference ID 173064d... and a 'New' record. The comparison table is as follows:

Attributes	173064d...	173064d...	New
id	43	45	62
sor	registry	registry2	sis
sorid	II160	JJ160	553815121
request_time	2019-07-28 12:16:32	2019-07-28 12:26:36	2019-10-27 12:43:55
resolution_time	2019-07-28 12:16:32	2019-07-28 12:26:36	
dob	1991-11-22	1991-11-22	1991-11-22
lastname	Doyle	Doyle	Dayle
firstname	Tom	Thomas	Tommy
ssn	7107137986085	7107137986085	7107137986085
netid			

Identity Registration 201

baseCAMPING with the cow



spherical cow
group



IDENTITY REGISTRATION 201

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COMANAGE MATCH