



Identity Registration 201

# baseCAMPING with the cow



spherical cow  
group



## IDENTITY REGISTRATION 201

baseCAMPING WITH THE COW  
COMANAGE MATCH



**BONUS SLIDES!**

# **COMANAGE MATCH**

**FEATURE SET IN SCREEN SHOTS**

# 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 web interface. The header is green with the COmanage logo and 'admin' user. The left sidebar contains navigation links: Matchgrid Settings, API Users, Attributes, Attribute Groups, Attribute Maps, Rules, and Systems of Record. The main content area is titled 'Reconcile Unresolved Requests' and shows a table with three columns: '173064d...', '173064d...', and 'New'. Each column has a button 'Assign This Reference ID'. The table rows include attributes like id, sor, sorid, request\_time, resolution\_time, dob, lastname, firstname, ssn, and netid. The 'lastname' row is highlighted with an orange border.

	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			

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

CManage Match > testgrid > Attributes

### Attributes

[Add New Attribute](#)

Name	Attribute Group	Action
dob		<a href="#">Edit</a> <a href="#">Delete</a>
firstname	official	<a href="#">Edit</a> <a href="#">Delete</a>
lastname	official	<a href="#">Edit</a> <a href="#">Delete</a>
netid		<a href="#">Edit</a> <a href="#">Delete</a>
ssn		<a href="#">Edit</a> <a href="#">Delete</a>

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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  
firstname

**Description**

**API Name \***  
names:given

**Alphanumeric** ☐

**Case Sensitive** ☐

**Null Equivalents** ☐

**Required** ☐

**Search Distance** 2

**Search Exact** ☒

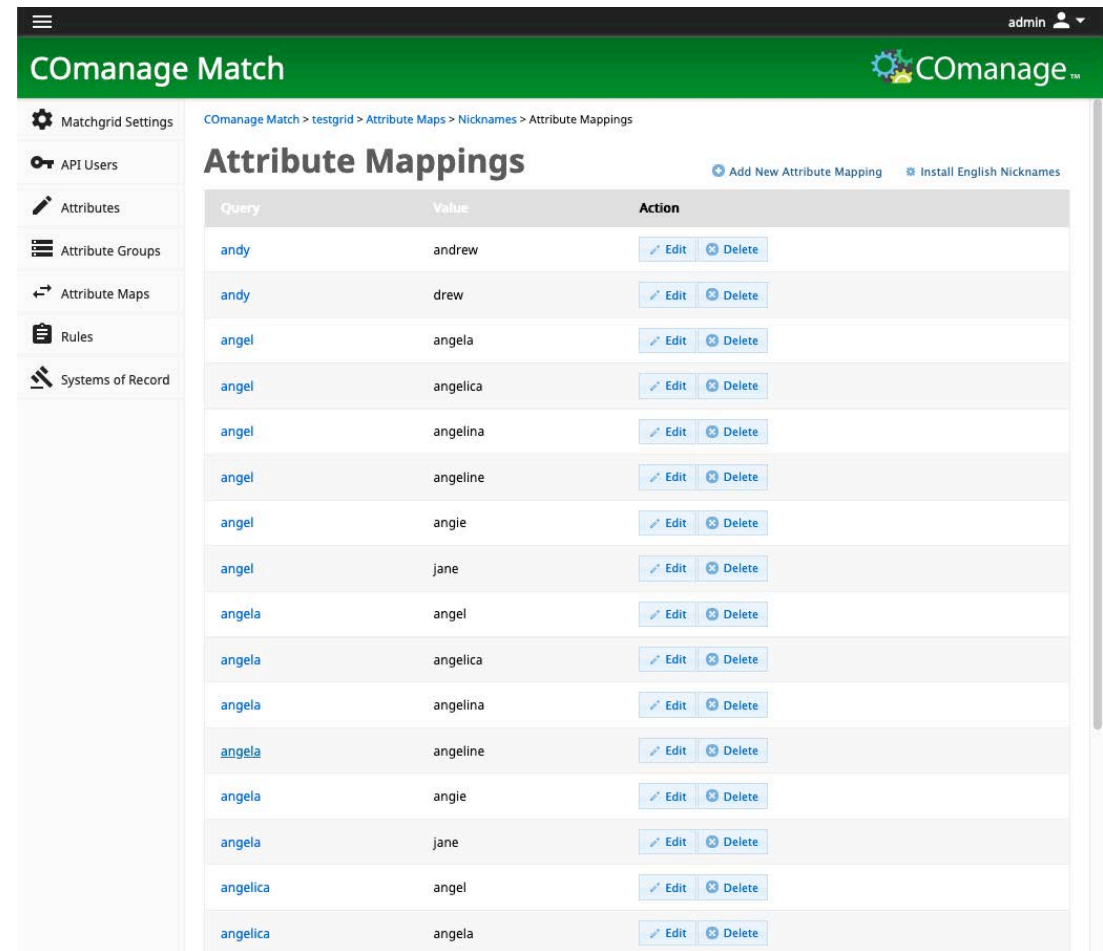
**Search Substring From** 1

**Search Substring For** 3

**Attribute Map** Nicknames

# ATTRIBUTE MAPS

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



The screenshot shows the CManage Match web application interface. The top navigation bar is green with the CManage logo and a user profile icon labeled 'admin'. A left sidebar contains a menu with icons for Matchgrid Settings, API Users, Attributes, Attribute Groups, Attribute Maps, Rules, and Systems of Record. The main content area displays the 'Attribute Mappings' page, which includes a breadcrumb trail: 'CManage Match > testgrid > Attribute Maps > Nicknames > Attribute Mappings'. There are two links at the top right: 'Add New Attribute Mapping' and 'Install English Nicknames'. The main table has three columns: 'Query', 'Value', and 'Action'. It lists 18 mappings for the 'Nicknames' attribute, showing various names and their corresponding values, each with 'Edit' and 'Delete' buttons.

Query	Value	Action
andy	andrew	<a href="#">Edit</a> <a href="#">Delete</a>
andy	drew	<a href="#">Edit</a> <a href="#">Delete</a>
angel	angela	<a href="#">Edit</a> <a href="#">Delete</a>
angel	angelica	<a href="#">Edit</a> <a href="#">Delete</a>
angel	angelina	<a href="#">Edit</a> <a href="#">Delete</a>
angel	angeline	<a href="#">Edit</a> <a href="#">Delete</a>
angel	angie	<a href="#">Edit</a> <a href="#">Delete</a>
angel	jane	<a href="#">Edit</a> <a href="#">Delete</a>
angela	angel	<a href="#">Edit</a> <a href="#">Delete</a>
angela	angelica	<a href="#">Edit</a> <a href="#">Delete</a>
angela	angelina	<a href="#">Edit</a> <a href="#">Delete</a>
angela	angeline	<a href="#">Edit</a> <a href="#">Delete</a>
angela	angie	<a href="#">Edit</a> <a href="#">Delete</a>
angela	jane	<a href="#">Edit</a> <a href="#">Delete</a>
angelica	angel	<a href="#">Edit</a> <a href="#">Delete</a>
angelica	angela	<a href="#">Edit</a> <a href="#">Delete</a>

# 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?

CManage Match

CManage Match > testgrid > Rules

### Rules

[Add New Rule](#)

Name	Confidence Mode	Order	Action
<a href="#">Rule C1</a>	Canonical	1	<a href="#">Edit</a> <a href="#">Delete</a>
<a href="#">Rule C2</a>	Canonical	2	<a href="#">Edit</a> <a href="#">Delete</a>
<a href="#">Rule P1</a>	Potential	1	<a href="#">Edit</a> <a href="#">Delete</a>
<a href="#">Rule P2</a>	Potential	2	<a href="#">Edit</a> <a href="#">Delete</a>

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CManage Match

CManage Match > testgrid > Rules > Edit Rule C1

### Edit Rule C1

**Name \*** Rule C1

**Description**

**Confidence Mode \*** Canonical

**Order \*** 1

**Search Types**

**dob \*** Exact

**firstname \*** Substring

**lastname \*** Exact

**netid \*** Skip

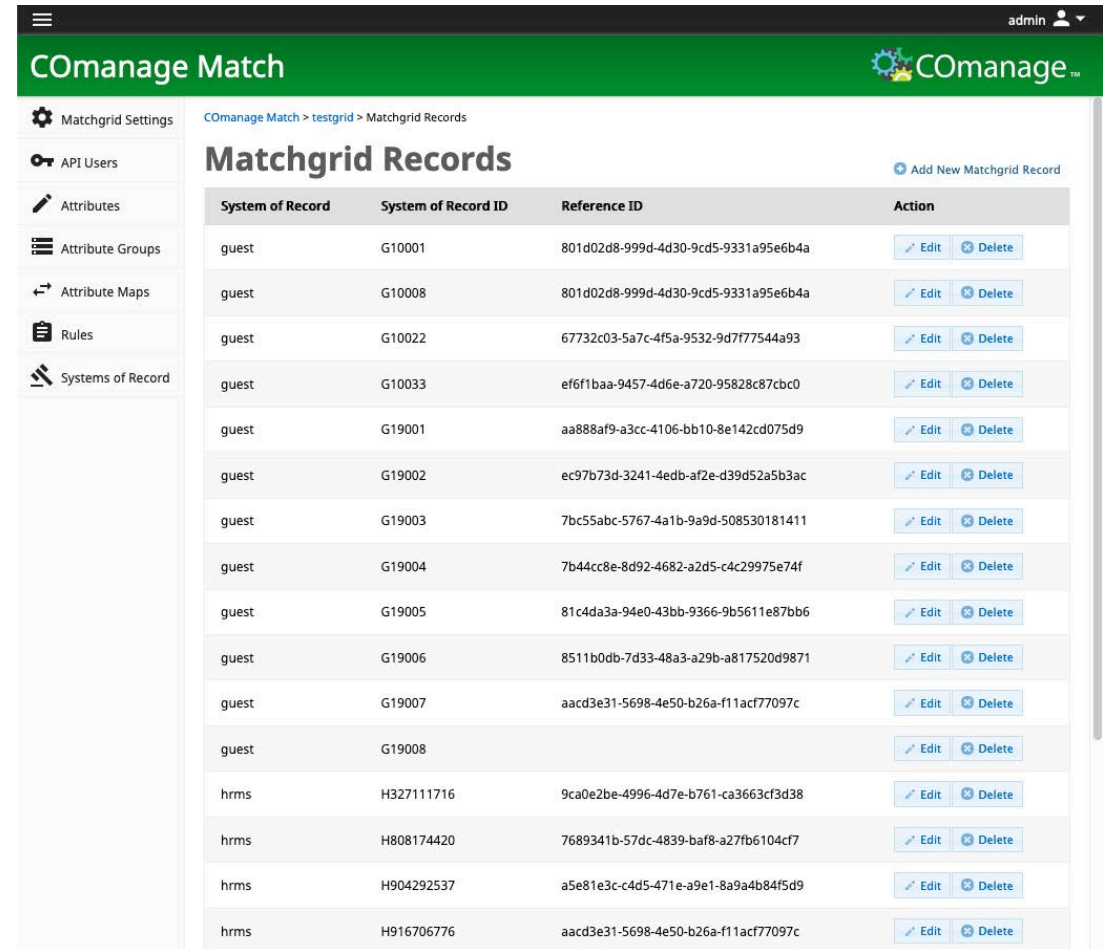
**ssn \*** Exact

\* Denotes Required Field

[SAVE](#)

# 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



CManage Match

admin

Matchgrid Settings

API Users

Attributes

Attribute Groups

Attribute Maps

Rules

Systems of Record

CManage Match > testgrid > Matchgrid Records

Matchgrid Records

Add New Matchgrid Record

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



# 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 CManage Match web application. The left sidebar contains navigation links: 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 displays '3 Pending Matches' in a table.

System of Record	System of Record ID	Request Time
sis	<a href="#">971194844</a>	2019-03-21 00:32:33
sis	<a href="#">553815121</a>	2019-10-27 12:43:55
guest	<a href="#">G19008</a>	2020-02-16 10:07:46

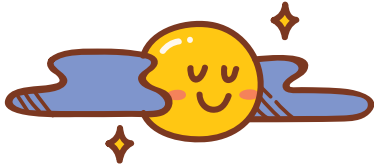
Powered By CManage™

The screenshot shows a detailed view of the 'Reconcile Unresolved Request sis/553815121'. It features a table with three columns: '173064d...', '173064d...', and 'New'. Each column has an 'Assign This Reference ID' button. The table lists various attributes for three different records.

	173064d...	173064d...	New
Attributes	<a href="#">Assign This Reference ID</a>	<a href="#">Assign This Reference ID</a>	<a href="#">Assign This Reference ID</a>
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			



# TO LEARN MORE



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