IDENTITY REGISTRATION 201

baseCAMPING WITH THE COW

COMANAGE MATCH

BONUS SLIDES!

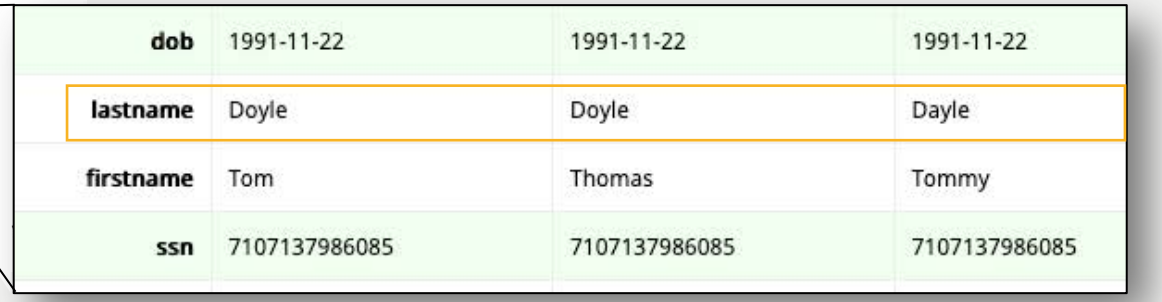
COMANAGE MATCH

FEATURE SET IN SCREEN SHOTS

COMANAGE MATCH

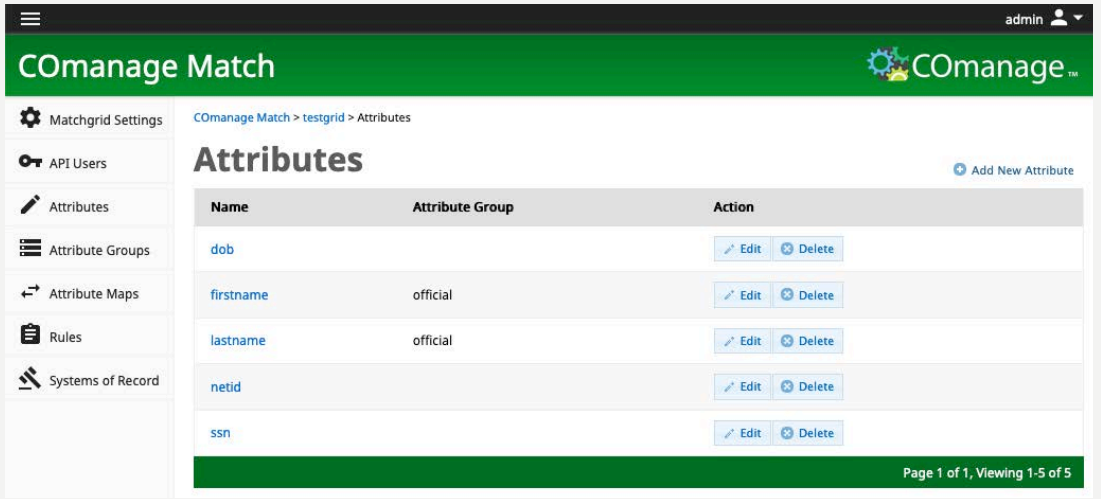
- System for matching items
- Use directly in COmanage - match people as they are registered
- API to integrate with other systems

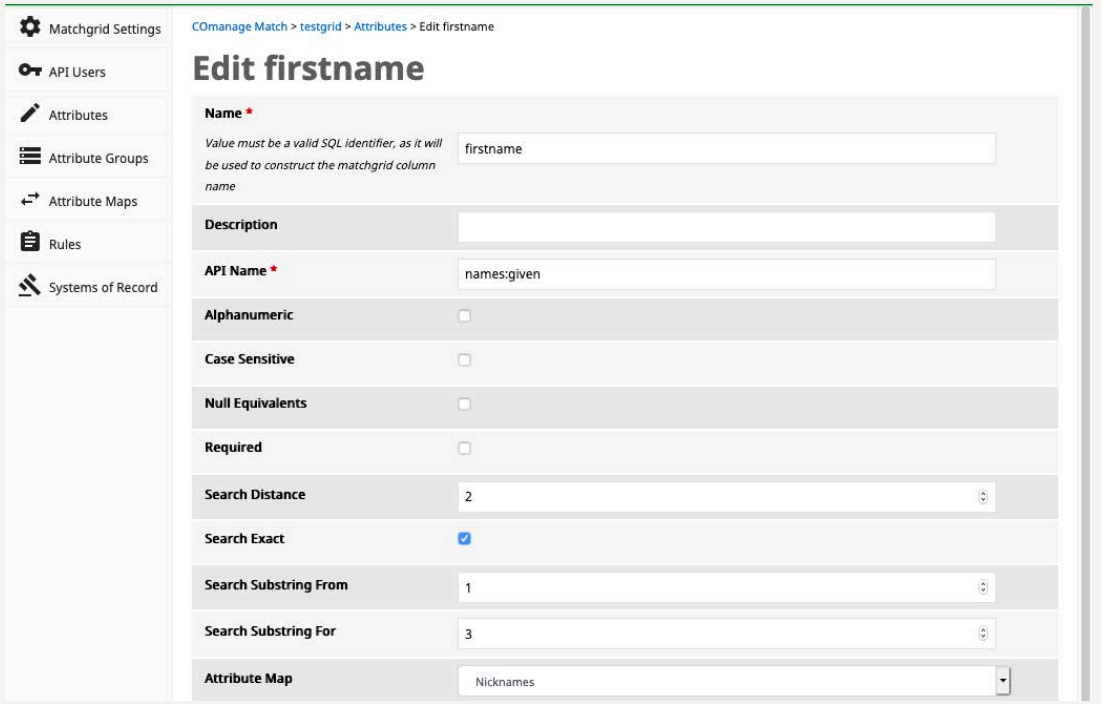
1. Define the attributes to be used for matching
2. Set up rules for matching (Canonical and Potential)
3. As items are evaluated, the rules are checked
    1. Items matching canonical rules > matching Reference ID
    2. Items matching none > new Reference ID
    3. Items matching potential rules flagged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



SELECT & CONFIGURE THE ATTRIBUTES

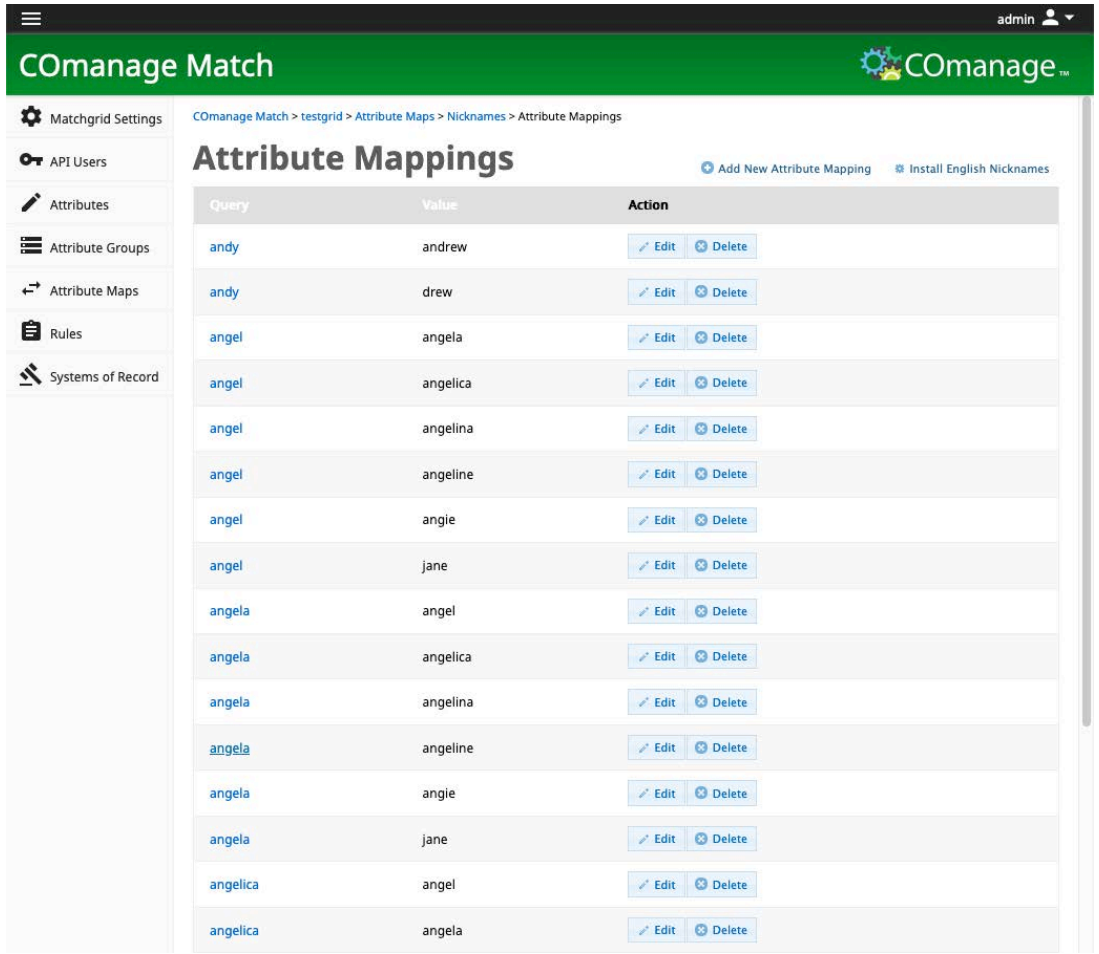
- Doesn't have to be about people
- Define attributes that are of similar quality across your sources
- Configure attributes – what constitutes a match?
  - How closely the need to match
  - Substring matches allowed?
  - Exact match required?
  - Attribute map to use…





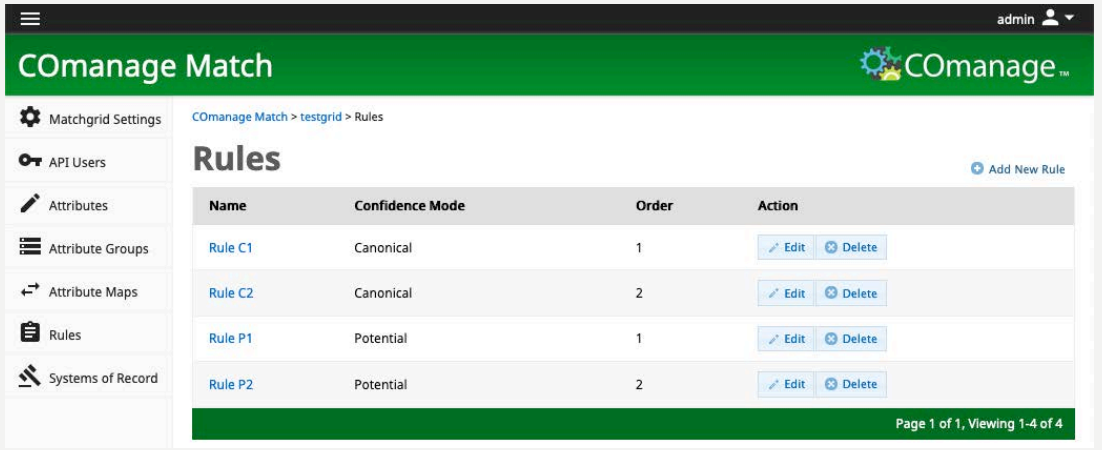
ATTRIBUTE MAPS

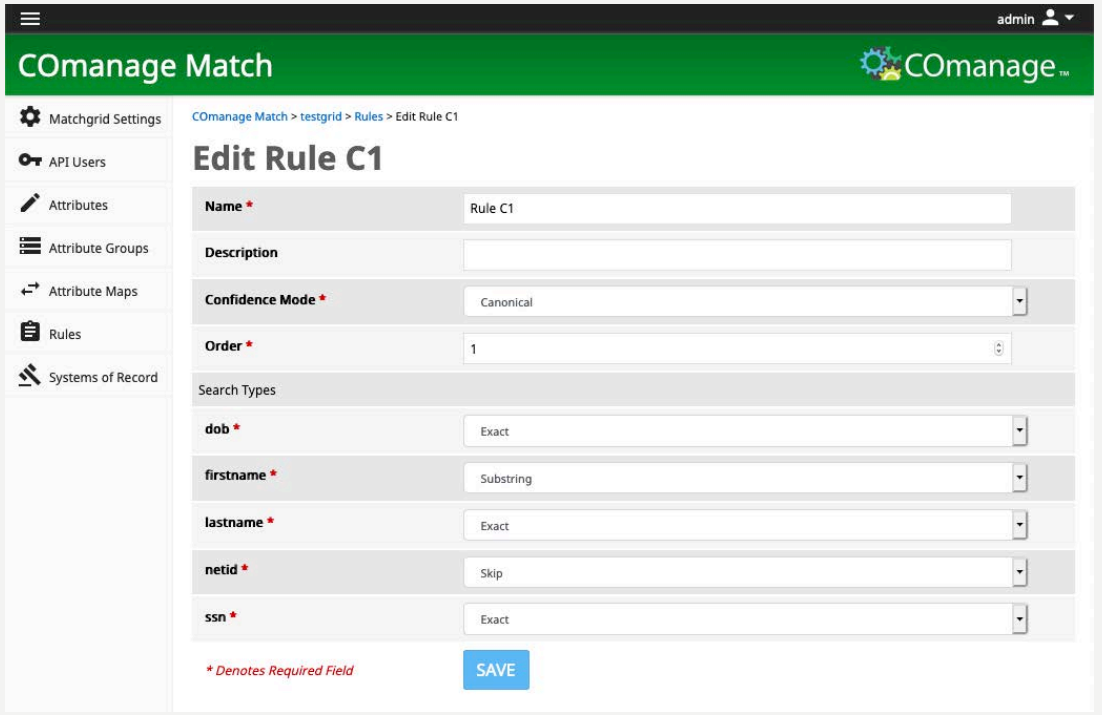
- Maps of values that should be treated similarly
  - Nicknames
  - Updated names
  - Alternate names
- Different maps for different attributes



CONFIGURE THE MATCHING RULES

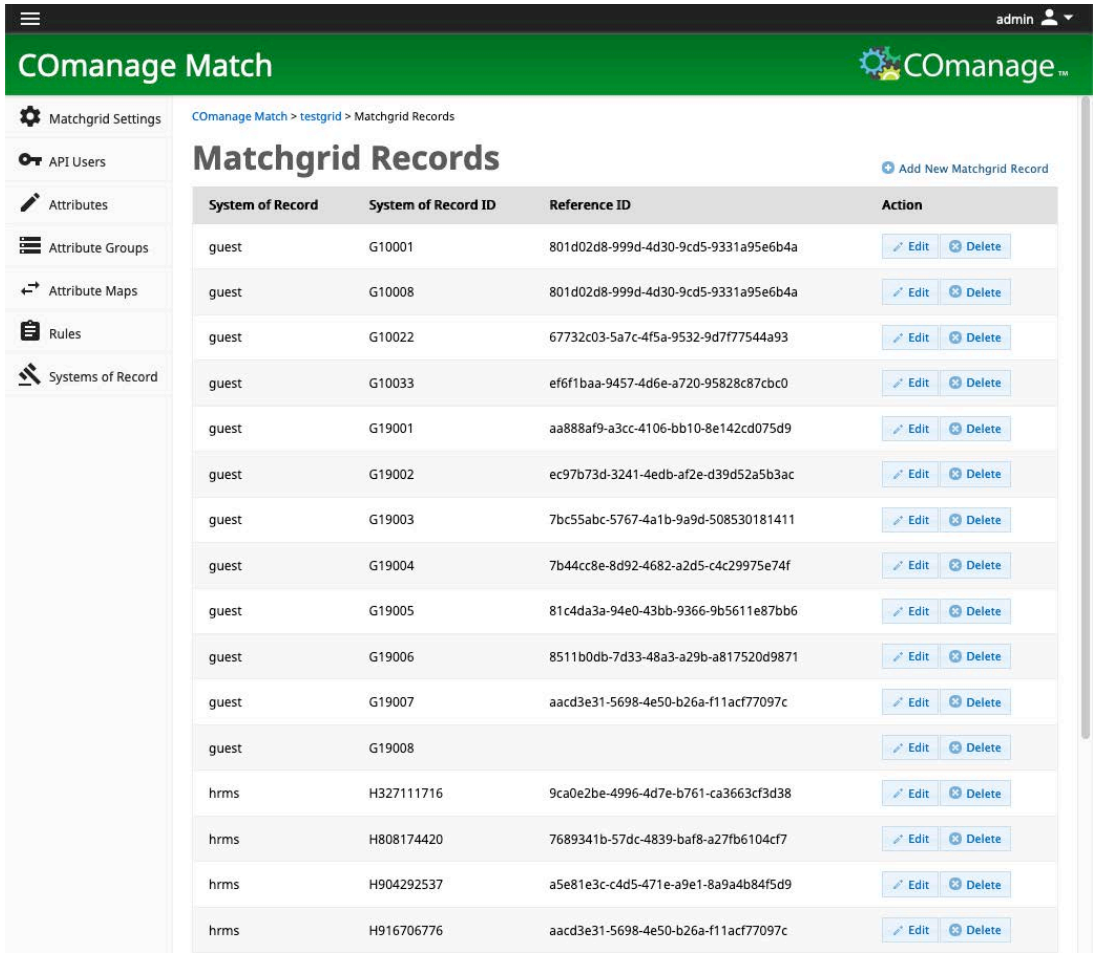
- Create a set of rules
  - Canonical – if all rules are met, the records are a match
  - Potential – if at least one rule is met, the records are a potential match
  - None of the rules match? No match! A new record is needed.
- Decide the order the rules should be evaluated
- What attributes are considered?





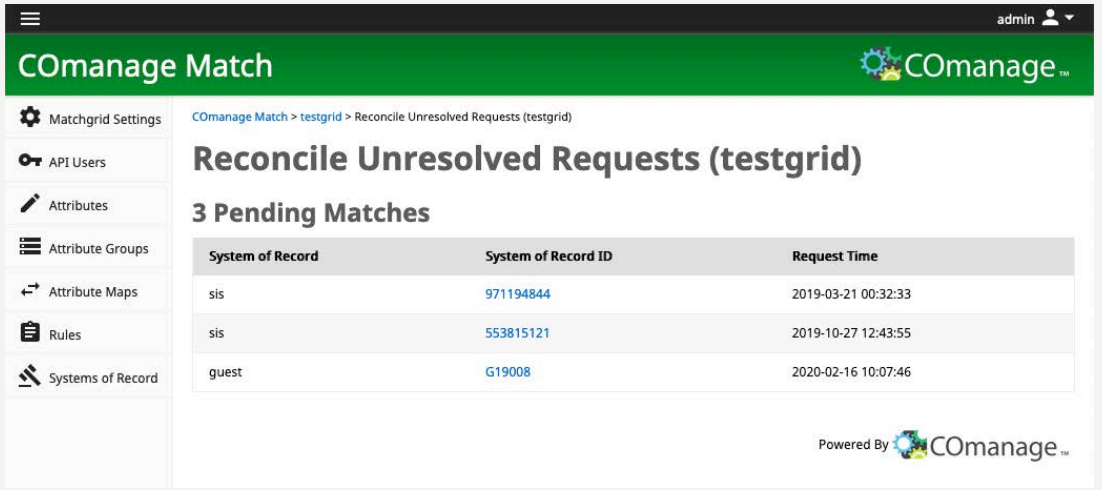
EVALUATING THE RECORDS

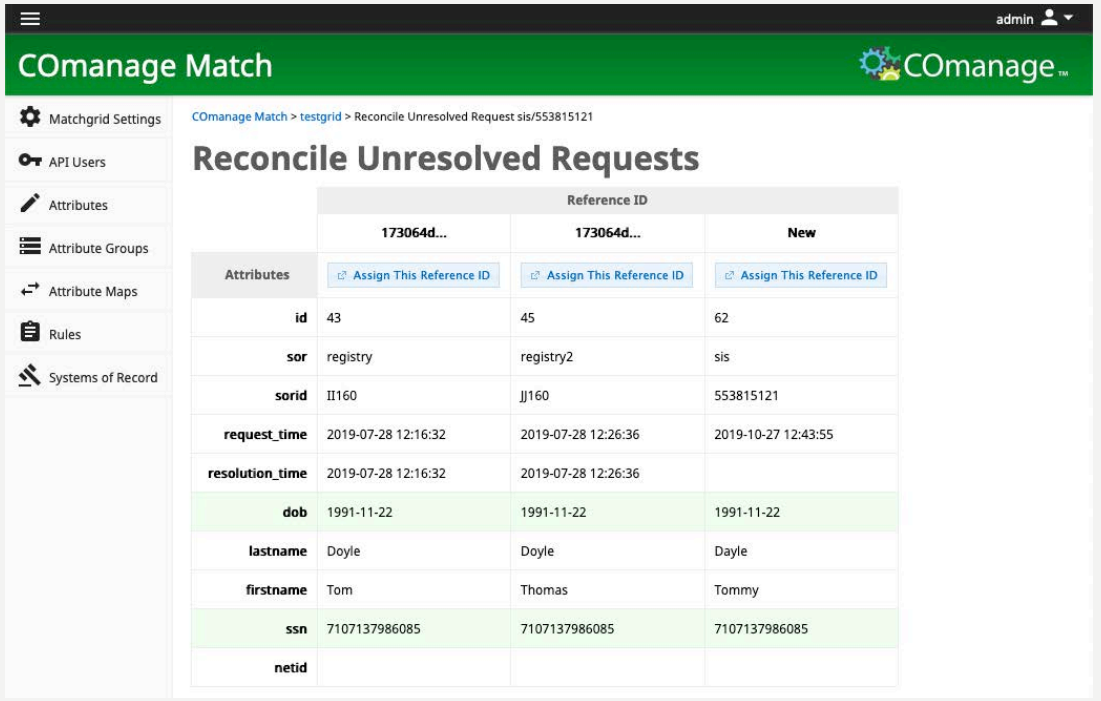
- As evaluated, records are added to the "Matchgrid"
  - No ambiguity? Reference ID is assigned
    - Match – ID is that of matching record
    - No Match – New ID is assigned
  - Potential match? Reference ID is blank
- Reference IDs used by relying systems to prevent duplicates
- Potential matches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



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





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Video by Vladimir Maric from Pixabay

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