



***Going Further
with matchIT***

Version 5.2

Copyright

matchIT is copyright © helpIT systems ltd 1994-2008, all rights reserved.

FoxPro is copyright © Microsoft Corporation 1988-2008, all rights reserved.

Trademarks

matchIT is a registered trademark of helpIT systems ltd.

FoxPro is a registered trademark of Microsoft Corporation.

All other trademarks are also acknowledged.

Contents

1	This Guide	1
2	Using matchIT's Menus	2
2.1	Import Menu	2
2.2	Matching Menu	2
2.3	Merge/Purge Menu	3
2.4	Output Menu	3
2.5	Jobs/Setup Menu	4
2.6	Tools Menu	5
2.7	Help Menu	5
3	Using the Manual Import Wizard	6
4	Importing a File Into an Existing DBF	8
5	Options.....	10
5.1	Changing the options without restarting the process.....	10
5.2	Processing options at the end of the Setup Wizard.....	11
5.3	Input Options	11
5.4	Matching Options.....	12
5.5	Operational Options	13
5.6	File Location Options.....	14
5.7	Save/Restore Setup	15
5.8	Names & Words Table.....	16
5.9	Intelligent Merge Options	17
6	Matching	19
6.1	Explanation of Match Keys.....	19
6.2	Household/Address Matching	21
6.3	Contact/Individual Matching.....	21
6.4	Company Matching	22
6.5	Household/Address Match Keys.....	22
6.6	Exact Matching.....	23
6.7	Verifying Matches	24
7	Modifying Reports	30
7.1	Report Branding	30
7.2	Report Layouts	30

8	Useful Tips.....	32
8.1	Recently Used Files.....	32
8.2	View Original File.....	32
8.3	Performance Data	32
8.4	Error Log.....	32
8.5	Using the Print Icon	32
9	Common Questions	33
9.1	Applying a matchIT USB activation	33
9.2	Moving a matchIT activation to Another PC.....	33
9.3	matchIT's Online FAQ.....	33

1 This Guide

This guide bridges the gap between the **Getting Started with matchIT Guide** and the full **User Manual** and **On-Line Help**. It describes common processes and options that are not covered by the Getting Started guide and cross refers to the User Manual where appropriate.

2 Using matchIT's Menus



2.1 Import Menu

- You can use this menu to access the **Setup Wizard** whenever you need to, no need to restart *matchIT* every time.
- You also have the ability to **Generate Keys** from this menu, once a Main File has already been created.

2.2 Matching Menu

- You can use the **Find Matches** option to find duplicate records within a file.
- The matching menu will allow you to access the **View Matches** option, which will provide a report of matching records.
- Accessing the **Verify Matches** option will allow you to manually go through each matching pair that has been found.
- Use the **Flag Matches** option to mark records that are over a defined score.
- This menu also provides the ability to **Transfer Data** within a defined scoring range.

2.3 Merge/Purge Menu

- You can use the **Find Overlap** option to find overlapping records between two separate files.
- Utilising the **View Overlap** option will provide a report of the overlapping records.
- Accessing the **Verify Overlap** option will allow you to manually go through each overlapping pair that has been found.
- The **Merge Files** option will add unique records from the secondary file to the Main File, after the overlapping records have been found.
- Using the **Transfer Data option** will allow users to move data from one file to another. *matchIT* scoring regulates this option.
- By using the **Write Overlapping Records** option, you can 'Create Main File' containing the overlapping records (from the Main file) that have been found within a certain scoring range.

2.4 Output Menu

- Using the **Output Matched Records** option is another way of writing out matches. With this option, though, you can select their desired output type.
- You can access *matchIT*'s **Quality Assurance Wizard** for data summaries, viewing data, viewing records by category, outputting to a file, outputting to a page, outputting to a label, or for writing flagged records.
- **Output To File** allows users to create a custom output

Main Options

Data Options

☐ Use Mailsort Options?

☒ Use sequential numbering?

☐ Shuffle Up Address Lines?

☐ Use Campaign History Options?

☐ Include flagged records?

Sampling Options

Record at which to start output : 1

and number it : 1

Number of records: All

☐ Selection: 0

☐ Sampling : One in 1000

Filters and Ordering

☐ Use index order? Index Expression: Edit...

☐ Use filter? Filter Expression: Edit...

Cancel Generate Output

format for files that have been processed through *matchIT*. Before actually generating the output, take a moment to look at the options in the lower half of this dialog. Check the *Use Sequential Numbering?* box to give each output record a unique number. The other options allow you to output either all the records or just a selection from the file – with a much larger file you might want to output the file in 2 halves, for example. The lowest check box allows you to use *1 in N sampling*, which is one of the Q/A functions mentioned earlier. For now, just click on the *Generate Output* button at the bottom of the dialog.

2.5 Jobs/Setup Menu

- If you wish to restore or create a new *matchIT* configuration, you can do so by using the **Save/Restore Setup** option.
- When comparing more than two files it is easiest to use the **Multiple File Wizard**. This option is located within the **Multiple File Job** sub-menu. The **Multiple File Wizard** will lead you through the setup, step by step.
- If *matchIT* does not recognise words that are common in your databases, you can modify the names & words table used by *matchIT*. Names & words can be removed or added to the table. Certain words or names can be flagged and replaced automatically, as long as you have specified what to replace them with. This option is available under **Names & Words**.

- The **Deletion Priorities**, located within **Matching Setup**, displays the priorities used by *matchIT* when the flag matches option is used. The records are in descending value of priority - in other words, rules that most increase the likelihood of a record being kept are at the top, with rules that most reduce it being kept at the bottom.
- The main options screen for the IDM (Intelligent Data Merge) process can be found under **Matching Setup** as **Intelligent Merge Options**. This option allows you to select which fields should be involved in the IDM process, and what options should be applied to those fields.

2.6 Tools Menu

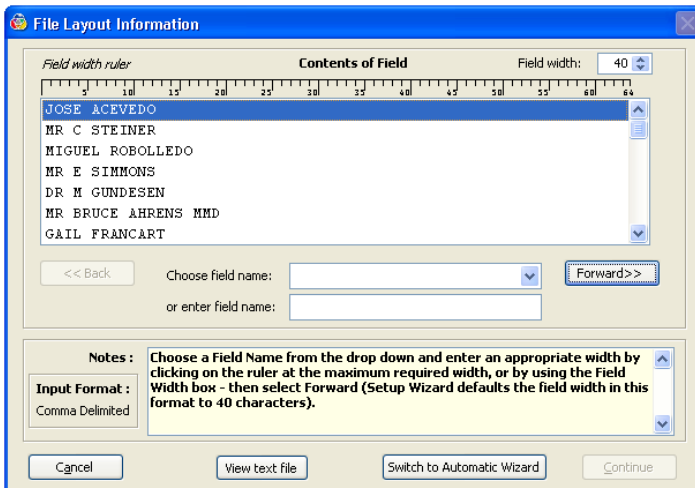
- *matchIT*'s **Database Utilities** can be used for many different things, for example: modifying layouts, clearing out certain fields, clear a whole table, rebuild corrupt indexes, etc.
- If you know some FoxPro (*matchIT* uses Visual FoxPro) or dBase (known as "xBASE") programming, you can key simple xBASE commands into *matchIT*'s **System Commands** window. These commands can be used to make 'out of the ordinary' changes to your matchIT DBF that the standard functions cannot make.
- Using the **Main File Layout Utilities** allows you to copy a DBF layout, create a layout report, or create a field widths report.

2.7 Help Menu

- The help menu provides all pertinent information for the use and support of *matchIT*.
- Such information includes: The helpIT systems website, the user manual, a getting started guide, an interactive support session, etc.

3 Using the Manual Import Wizard

If you are unable to use the Automatic Import Wizard to determine the type of data in each field, choose **Switch to Manual Wizard**. You can then see your data (one field at a time) and name each field in turn, as shown below. For each field, the choices are similar to the automatic process, described in the “Getting Started Guide”. Here, though, you can change the suggested field width in one of two ways – you can either click on the **Field Width Ruler** at the top of the dialog box, or type in the value in the **Field Width** window near the top right of the dialog box. If you’re not sure what to do, the *Notes* at the bottom of the screen give relevant instructions at any stage, depending on the data shown in the **Contents of Field** window.



To describe the Manual Wizard process we will use EXAMPLE1.TXT as a guide. In EXAMPLE1.TXT the first field contains all the elements of the addressee's name, so it should be named FULLNAME/ADDRESSEE from the drop down list of field names below the main window area. Once you have named the first field, click on the **Forward** button to move on to the next field. The second field in the Rest of World sample data file contains job titles, so scroll through the drop down list to select JOB TITLE. The next field is clearly company name, so select COMPANY from the list. The

next 3 fields are all address lines, and you should select ADDRESS LINE from the list for each of these fields. Within some records the next field contains a Zip or Postcode, but within most records it contains address data, so select ADDRESS LINE. By default, *matchIT* finds Zip codes and Postcodes in the address lines and moves them to a specific field. *matchIT* does not require State to be in a fixed field, but it can relocate it to a fixed field if required.

The next field is a separate Zip or Postcode field, so the relevant field name is ZIP/POSTCODE from the drop down list. Change the width of this field to 10 characters, either by clicking on the field width ruler at the top of the dialog, or changing the value in the **Field Width** box at the top right. The last field in the US sample data file is telephone number, which is also selectable from the drop down list. You can go back to a previously named field and change the name or width if you wish, before leaving the Import Wizard's file layout stage.

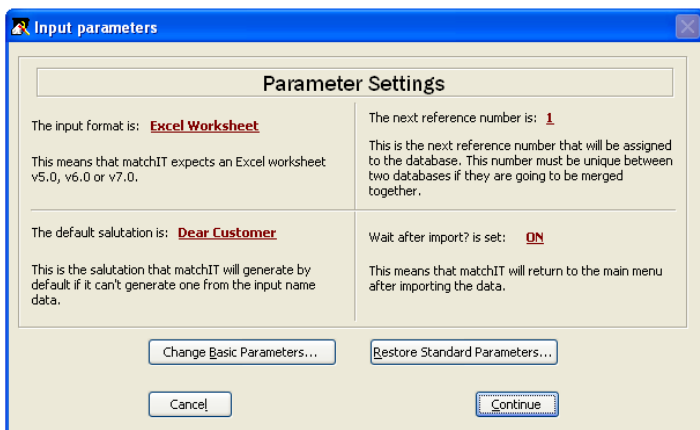
When you have named the last of the fields in your data, the Import Wizard displays the message 'No more Fields' in the **Contents of Field** window and the **Continue** button becomes active.

4 Importing a File Into an Existing DBF

matchIT gives the user the ability to import a source file into a previously created DBF. This can come in handy for several situations, such as: building a job that you want to run later, or creating a "shell" DBF (see ***Save and Exit*** in the Online Help) for constantly growing files.

To import a file into the *matchIT* DBF, it must be in the same format as the original file that was used to create the DBF.

To use *matchIT*'s import feature, select **Import Records** from the Import menu. If no DBF is open, you will be prompted for the DBF you would like to import into. Otherwise, make sure the DBF you would like to use is open as the Main DBF. The Input Parameters window will then be displayed (as pictured below). Here you will see what the input format is set to, what the default salutation is, the next reference number to be used, and if *matchIT* is set to wait after the import stage.



By clicking **Restore Standard Parameters**, you will be taken to *matchIT*'s Save/Restore window. To change the DBF's current input format or default salutation, you would select **Change Basic Parameters**. This option will take you into the *matchIT* options window (see ***Input Option*** in the Online Help). Once you have

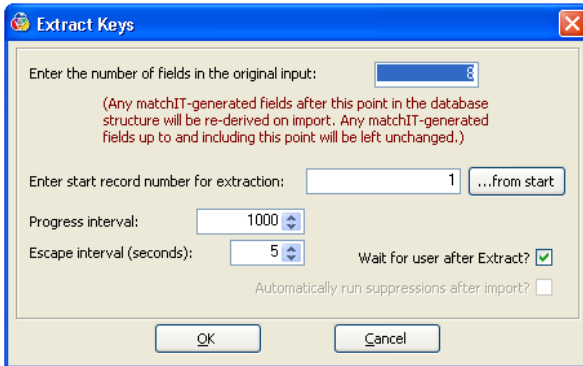
made the necessary changes, select **Continue**. You will then be prompted for an import file, by default the **Files of type** will be set by the input format that you previously specified. Once you select the file to **Import**, *matchIT* will begin importing the file into the selected DBF and creating the *various* keys.

On completion of the Import Records step, the first dialog that is displayed is determined by whether or not the **Wait For User** option is switched on. If the **Wait for user** option was off, *matchIT* will go directly into the matching process and the next window to be displayed will be the Import Summary report. With the **Wait for user** option on, a processing window will be displayed offering the option to either **Cancel**, view the **QA Wizard**, or to begin the **Find Matches** step.

The **Wait For User** option is located in the Operational tab, in the main *matchIT* options, which can be accessed by clicking on **Change Basic Parameters** in the Input Parameters dialog.

5 Options

5.1 Changing the options without restarting the process

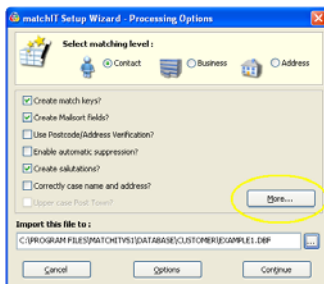


If you would like to change any of matchIT's options (e.g. change the Default Salutation, or switch on or off the Correctly Case Incoming Data function) after importing your file but without having to start the whole process again, you can do so with the aid of the **Generate Keys** function. In order to use this function, you should simply make the necessary changes, and then select **Generate Keys** from the Import menu. If you then choose Ok, matchIT will re-generate the keys in your file as per the new options that you have selected. Your data may also be modified, if the changes you have made to the options require it to be (e.g. if since the initial import you have switched on the Correctly Case Incoming Data function).

The same principle applies to the matching options. After importing your file, or both importing and Finding Matches, you wish to change any of the matching options, you can do so, then select **Find Matches** from the Matching menu. Doing so will produce the Matching Key and Range dialog. You can at this point select the match keys you would like to use, then choose Continue.

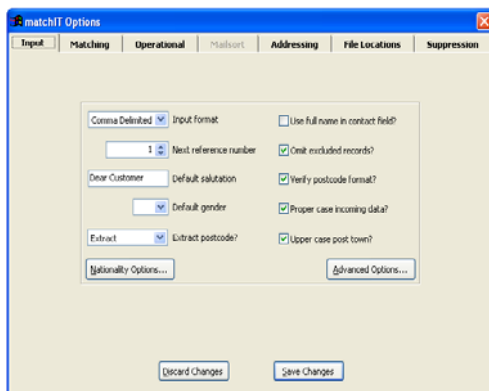
5.2 Processing options at the end of the Setup Wizard

More... will open several other processing options. These additional options are Import Only, Find Matches, and Save & Exit. Some of their functionality will be discussed later.



5.3 Input Options

Using the *matchIT* **Input Options** (see also *Input Options* in the Online Help), you can select the input format of data, the default salutation, and the default sex. *matchIT* has the ability to **Extract** postcodes from anywhere within the address fields. It will find mislocated postcodes and file them into a 'POSTCODE' field which, if it does not already exist, will be created automatically. Furthermore, you have the option to; **Proper Case Incoming Data**, useful when working with very large, or ill-structured, data set. Another important option is **Use Full Name In Contact Field**. This option will allow *matchIT* to derive full contact names from the information available. If *matchIT* cannot determine a full contact name when generating salutations in you data, it will use the **Default Salutation**.



5.4 Matching Options

The **Matching Options** will enable you to determine some of the more important options. You can choose whether you want to match on personal or business names, you can determine the minimum score for *matchIT* to report, and there is also the ability to use **Household Matching** (matching on address only). To specify a different matching level, you must utilise the Save/Restore Setup function (located in the Jobs/Setup Menu). The most common use of this screen is to set the options for **Minimum score to report** & for **Must have house/building number match**.

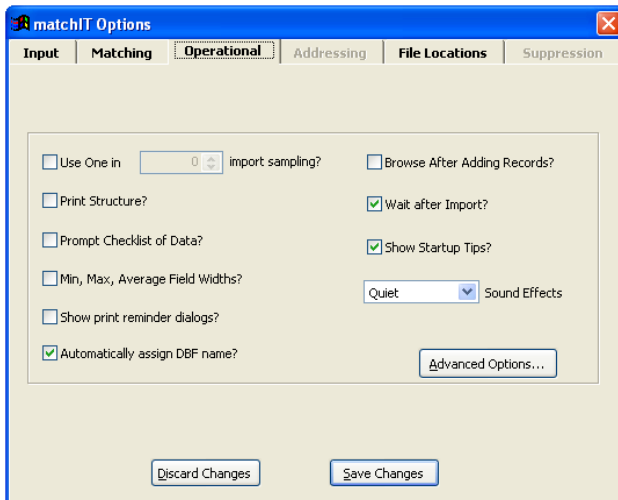
The screenshot shows the 'matchIT Options' dialog box with the 'Matching' tab selected. The 'Current match level' is set to 'Individual'. The following options are visible:

- ☒ Must have match on gender? (Personal)
- ☒ Must have match on location? (80)
- ☐ Must have building/house/apartment number match? (soundIT)
- ☐ Don't allow matches where there is no street number in one record? (Internal Only)
- ☐ Flag higher reference?
- ☐ Allow equal file priority in multiple file jobs?

Additional settings include 'Name key generation' and 'Minimum score to report' (80). A 'Keep best record' checkbox is also present. An 'Advanced Options...' button is located at the bottom right of the options area. At the bottom of the dialog are 'Discard Changes' and 'Save Changes' buttons.

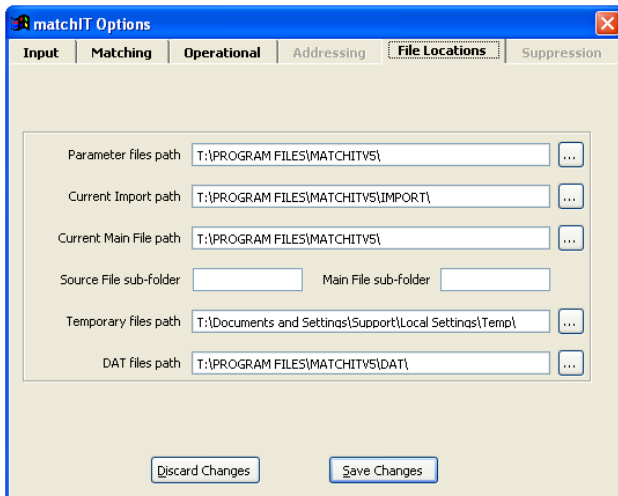
5.5 Operational Options

Many of *matchIT*'s **Operational Options** (see also *Operational Options* in the Online Help) can be changed within this window. You have the ability to change the **Sound Effects**, toggle **Show Startup Tips**, and several other options. The most common options here are **Wait after Import**, **Browse after Adding Records**, **Print Structure**, and **Min, Max, Average Field Widths**. Setting the **Wait after Import** option allows you to specify instructions after the Import stage. The **Browse after Adding Records** option allows you to view the Main File contents before any keys are generated. Turning on **Print Structure** will display the Main File structure prior to the Import stage. To display the file structure and field widths after Import, turn on the **Min, Max, Average Field Widths** option.



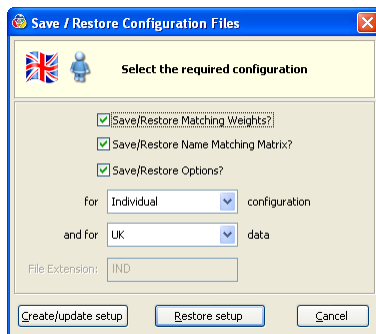
5.6 File Location Options

Within the **File Location Options**, (see also *File Location Options* in the Online Help), there is a box labeled **Temporary File Directory**. *matchIT* creates many temporary files while processing through data. These files may be stored in a directory of your choosing. Click the “...” button to designate a path to the temporary file directory you would like to use. The **File Location Options** window also allows you to see where much of *matchIT*'s information and default folders are located. The Import directory is the default location for the files you will be loading into *matchIT*, while the Database folder is where *matchIT* will store the DBF's created when a file is imported.



5.7 Save/Restore Setup

The **Save/Restore** option (located under the **Job/Setup** menu) allows users to restore *matchIT*'s default settings. More experienced users will also want to save or restore a custom configuration using this function.



Here you can restore matching weights, the name matching matrix and the main options for Personal configurations, **Business** configurations, **Household/Address** configurations, **Family** configurations, or **Custom** configurations at any time. This will allow users to set configurations for files whose structure is already known, without going through the Setup Wizard. Furthermore, you can use this window to prepare *matchIT* for data that is of a nationality other than that of its default setting (your installation nationality).

If you change from one matching level to another after import, you should always regenerate the match keys (Import Menu>Generate Keys) before finding matches or overlap.

To save a custom configuration, specify the nationality and check which options (Weights, Matching Matrix &/or Options) you would like to save. Then set the configuration to **Custom** and type in a unique file extension. Once you have done the above requirements, you can **Create/Update** the configuration. When you are ready to restore your configuration, just set the configuration to **Custom**, type in your custom File Extension, and then click on **Restore Setup**.

NB: If you are restoring a Custom configuration, you must first restore options for the nationality under which you saved the Custom setup, unless the nationality has not changed since you saved the configuration.

5.8 Names & Words Table

Using the **Names & Words** option under **Jobs/Setup** allows you to modify names and words within *matchIT*. You can also add your own entries that may not already be in the table. You can also search through the table for a specific word or name to see if it is located in *matchIT*'s directory. Some words or names may have different properties than *matchIT* lists. In this case you can select to change an entry or add a completely new one. Either way, it is very important to note the name of the old Names and Words database. This will allow a user to restore *matchIT*'s original settings, in the event that your modifications begin to cause problems.

NAMES Data Maintenance

Type	Name	Equivalent	Sex	Salutat	Proper Case	Switch
A	ALLEY	ALLEE				F
A	ALLEY	ALLEY				F
A	ALLEY	ALLY				F
A	ALLEY	ALY				F
A	ANNEX	ANEX				F
A	ANNEX	ANNEX				F
A	ANNEX	ANNX				F
A	ANNEX	ANX				F
A	ARCADE	ARC				F
A	ARCADE	ARCADE				F
A	AVENUE	AV			Ave	F
A	AVENUE	AVE			Ave	F
A	AVENUE	AVENUE				F
A	BEACH	BCH			Bch	F

Entries: 6316

Add Entry
Change Entry
Remove Entry
Search for an Entry
Order by Type
Order by Name
Order by Equivalent

Look at: Single Words Save Cancel

You must Save the changes made to the Names & Words table before you close the window. Otherwise, all modifications will be lost.

To add an exclusion word, simply select the **Add Entry** button. The window shown will then be displayed. You will want to specify Exclusion as the **Of type**, and type in the exclusion word in the **Word to add** box. If you like, you can specify a **Matching equivalent** by entering one in the appropriate box. There is no need to specify the **Proper case** of the word, as it is set to be excluded. Once you have filled out the necessary information, you can select **Add**.

To add an Exclusion word for a double word phrase, simply change the **Look at** drop-down, located at the bottom of the Names Data Maintenance dialog, to **Double Word Phrases**. As in the previous example, we will add an exclusion, but this time it will be for a Double Word Phrase. Select **Add Entry** and the same window from the previous example will open. This time we will set *matchIT* to exclude the phrase "Mickey Mouse". Once again, specify Exclusion as the **Of type**,

and type in the exclusion word in the **Phrase to add** box. Once you have filled out the necessary information, you can select **Add**. Now, during import, if matchIT finds any records that contain "Mickey Mouse" in any of their fields, these records will be excluded.

5.9 Intelligent Merge Options

The main options screen for the intelligent data merge process can be found under the menu **Jobs/Setup > Matching Setup** as

Intelligent Merge Options. A file must be open to access this option. The **Intelligent Merge Options** allow you to select fields for the merging process, and the options to apply to those fields. The **Available Fields** box will show the fields that are within the current database. If there are two databases open, this window will show common field names between the two. Fields listed inside the **Fields Selected** box are items that will be included in the intelligent data merge process. You have the option of editing these options and saving their changes by selecting **OK** after the changes have been made. **Cancel** will disregard any changes that you made to this window.

Intelligent Merge Options

Available Fields	Fields Selected	Default Options	Special Options
ADDRESSSEE JOB_TITLE COMPANY ADDRESSLINES POSTCODE OTHER1 SEX MATCH_REF	JOB_TITLE COMPANY TELEPHONE FAX DEPARTMENT ADDRESSLINES	Default Priority: <input type="text"/> Casing: <input type="text"/>	<input type="checkbox"/> Name Completion <input type="checkbox"/> Assume Surname Exists

Pressing 'OK' will save the selected fields and corresponding options for use in the Intelligent Data Merge procedure. Pressing 'Cancel' will cancel the operation.

Available Fields - This list will only show those fields which exist in the current database or, in the case of two databases, which exist in both.

Special Options - 'Name Completion' will only be available if an 'Addressee' field exists.

6 Matching

For more information on the matching process, see *Introduction to Matching* in the Online Help

6.1 Explanation of Match Keys

Matching Key and Range

List of Fields / Keys Available

- Outward Postcode (Town/City) + Phonetic Surname Key
- Inward Postcode (Street) + Phonetic Surname Key & Initial
- Phonetic Surname Key + Phonetic Key of Street
- Phonetic Surname Key + Phonetic Town/City Key
- Postcode
- Phonetic Address Key (Town/City & Street)
- Phonetic Surname Key + Phonetic Company Name Key
- Outward Postcode (Town/City) + Phonetic Company Name Key

Select Key Index:

Keys Chosen for Matching

New Key Remove Key Clear Keys Verify Keys

☒ Use default keys?
☐ Save as default keys?

Key Range

Start:
End:

☒ Basic ☐ Advanced
☒ Is this a new analysis?

Cancel Continue

Whether *matchIT* is comparing two databases at a time or finding duplicates within one database, it would take far too long if *matchIT* compared every record in the database with every other record. To overcome this problem, *matchIT* generates phonetic and other keys that are used to find groups of records that are worth comparing – these can be described as “candidate matches”. This screen allows you to select the keys used to find these candidates. You can use any of the fields in the database as matching keys, but you should ensure that they are appropriate. As a general rule, you should select three keys, which instructs *matchIT* to look through the database using three different search criteria. There should **not** be a common element to all the keys e.g. you must make sure that Phonetic Surname Key is not contained within every key. This will help ensure that you pick up all duplication, no matter how the data is structured.

Consider the first key listed in the top half of the dialog, **Outward Postcode (Town/City) + Phonetic Surname Key**. This means that *matchIT* will look at all groups of records where all of the POST_OUT (outward part/first half of postcode) fields, & the phonetic key of surname are the same, so that it can check which (if any) of these records it should report as potential duplicates. *matchIT* examines every pair of records within each group looking at **all** the relevant fields in those two records, and works out a 'score' that represents how closely they match **overall**. For example:

- *Bill Smith of 24 Church Rise, Leatherhead, KT22 8DT*
and
- *Debra Smyth of 53 Green Lane, Leatherhead, KT22 7BL*

...would be compared because they would both have the same phonetic surname key and both of their postcodes start with 'KT22'. However, they would not warrant a score that is high enough for *matchIT* to show them as a duplicate. However...

- *Mr W L Smyth of Church Rise, Leatherhead, KT22 8DD*

...*would* be shown as a potential duplicate of Bill Smith above, because *matchIT* knows that Bill can be a short form of William and that Smith sounds like Smyth.

Select the option **Use default keys** from the bottom left of the dialog.

You will see that the keys shown below are chosen.

The plain English description of these keys is:

- *Outward Postcode (Town/City) + Phonetic Surname Key*
- *phonetic Surname key + phonetic street key*
- *Postcode*

You can use these defaults with confidence when finding duplicates in nearly all normal US data files. In cases where you are dealing with complicated or badly structured data, *matchIT* has the flexibility to find all of the duplicates, no matter how difficult the data may be to process – but for this you need *matchIT* training or careful reading of the Online Help or User Manual, with time to experiment.

Scroll down the list of keys, and you will see that any of the fields that occur in one or both databases for overlap, can be used to find

duplicates. Fields that begin with a lower case letter have not been standardised by *matchIT*, and are not as reliable for finding matches as those that have been standardised.

If you are selecting match keys rather than using the defaults, you must select *New Key* before each new match key that you select.

6.2 Household/Address Matching

This level of matching is used primarily for residential data. Household matching **will link** records with the same address, regardless of name.

For example:

- *John Smith of 24 Church Rise, Leatherhead, KT22 8DT*
- *Lucy Jones of 24 Church Rise, Leatherhead, KT22 8DT*

6.3 Contact/Individual Matching

Matching at contact level is primarily the same as using individual level matching. Contact matching will deduplicate down to one record per person at a location. Contact level matching **will link** these two contacts.

For example:

- *Jonathan Smith of 24 Church Rise, Leatherhead, KT22 8DT*
- *Mr J L Smith of 24 Church Rise, Leatherhead, Surrey, KT22 8DT*

Even in the following example, the records would be considered as contact level matches.

For example:

- *Jonathan Smith, ABC Ltd, 24 Church Rise, Leatherhead, KT22 8DT*
- *Mr J L Smyth, XYZ Systems, Church Rise, Leatherhead, Surrey, KT22 8DT*

This is because, by default, the company name is ignored when looking for contact level matches – perhaps XYZ Systems is part of ABC Group and J Smith acts for both levels of the company, or

perhaps the company has changed its name. It is much more common for the records to represent the same person than different people in this kind of scenario.

6.4 Company Matching

This level is used to produce one record per company or business, thus ignoring any contact names. Therefore, two different employees working for the same company will be matched, as long as the addresses and Postcodes match well enough. Company level matching **will link** the following records.

For example:

- *John Smith, XYZ Ltd, 24 Church Rise, Leatherhead, KT22 8DT*
- *Lucy Jones, XYZ, 24 Church Rise, Surrey, KT22 8DT*

6.5 Household/Address Match Keys

If you are matching at household i.e. address level, the normal default match keys are not so effective, because two of them include the phonetic key of surname. If you have personal or company names in your data file, it is quite reasonable to use a key that includes surname, as long as the majority of the keys that you use do not rely on the surname key being the same. Therefore, in this case we recommend using the following keys:

- **POST_OUT+NAME1** i.e. Outward part of postcode + phonetic surname key
- **ADD_KEY+PREMISE** i.e. phonetic address key + building or apartment number
- **POSTCODE**

If you do not have personal or company names in your data file, replace the first key with **PUN_TRIM(ADDRESS1+ADDRESS2)+POSTCODE** i.e. the first two lines of address, upper cased and with punctuation removed, plus the Postcode.

6.6 Exact Matching

You can perform exact matching on any database. Exact matching just does an exact match on one field or a combination of fields – no fuzzy matching or matching weights are used. Exact matching can be carried out, not only using matchIT's standardised fields (e.g. NAME, POSTCODE, etc), but can also be carried out using fields that matchIT does not recognise (e.g. ACCOUNT, DOB, etc). After selecting the match key(s) you would like to use for exact matching, you need to select the Advanced radio button within the **Matching Key and Range** window. The option of **Fuzzy** matching or **Exact** matching will now appear. As well as selecting a single field as each match key, you can also combine fields to create exact match keys.

Matching Key and Range

List of Fields / Keys Available

- POST_OUT + NAME1
- POST_IN + NAME_KEY
- NAME1 + SUBSTR(ADD_KEY,5,4)
- NAME1 + LEFT(ADD_KEY,4)
- POSTCODE
- ADD_KEY
- NAME1 + COY_KEY
- POST_OUT + COY_KEY

Select Key Index:

Keys Chosen for Matching

New Key

Remove Key

Clear Keys

Verify Keys

☐ Use default keys?

☐ Save as default keys?

☐ Fuzzy Matching ☒ Exact Matching

Key Range

Start:

End:

☐ Basic ☒ Advanced

☒ Is this a new analysis?

6.7 Verifying Matches

Once your data file has been imported to *matchIT* and internally deduped, you have the ability to manually verify each match. You can access this option under the **Matching Results** window, or use the **Verify Matches** option under the **Matching** menu. Alternatively (or after using Verify Matches), you can enter a threshold score at and above which you want to flag records as duplicates, by selecting **Flag Matches** from the **Matching Results** window.

Matching Results

Run Number	Number of Duplicates*	Matching Key	Time Taken
20	7	Outward Postcode (Town/City) + Phonetic Surname Key	00:00:00
21	3	Phonetic Surname Key + Phonetic Key of Street	00:00:01
22	3	Postcode	00:00:00



* This shows number of potential duplicates

Cancel

View Matches

Verify Matches

Flag Matches

This screen (see next page) displays potential duplicates, in pairs. Below each pair the matching score is shown. The matches are shown with the least likely dupes (lowest match scores) first, as you may only want to review the lower scoring pairs. If any pair shown is not a true match, select the **False Match** button to disregard the match. If you find that most of the matches at the lower scores are false matches, you can use either the  or  buttons to flag any records which are true matches at these lower scores.

Overlapping Pair, Score: 110

Record in Main Database		Record in Second Database	
UNIQUE_REF	0000081	UNIQUE_REF	0000087
PREFIX	Mr	ADDRESSEE	RORY MCTAGGART
FORENAMES	R G	JOB_TITLE	
SURNAME	McTaggart	COMPANY	
JOB_TITLE		ADDRESS1	KENNEL HOUSE
COMPANY		ADDRESS2	133 OAKWOOD LANE
ADDRESS1	Kennel House	ADDRESS3	FETCHAM
ADDRESS2	133 Oakwood Lane	ADDRESS4	SURREY
ADDRESS3	Fetcham	POSTCODE	KT22 9PQ
ADDRESS4	Surrey	PREMISE	133
POSTCODE	KT22 9PO	CONTACT	Mr R McTaggart
PREMISE	133	SALUTATION	Dear Mr McTaggart
CONTACT	Mr R G McTaggart	MATCH_REF	0000087
SALUTATION	Dear Mr McTaggart	SET_DUPS	

Matching Score: 110

Buttons: next score, False Match, Change Fields..., Mark Place, Resume Place, Done

The different colored highlighting is used to help distinguish which fields differ between the two records. Red highlighting is used to show where a field is different between the two records shown, whereas yellow shows that the field contents are a subset of the corresponding field in the matching record.

The buttons in the top right part of the screen control movement through the table; other buttons allow further options. The functions of the relevant buttons are as follows:



Go back to the first pair displayed (lowest matching score selected).



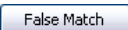
Go back to the previous pair displayed (or press Page Down).



Go forward to the next pair, which may be for a higher score than the current pair displayed (or press Page Up).



Jump to the pair with the next highest score. (A little message "No more scores!" appears in the top right when the end of the pairs is reached.)



If the pair shown is not a true match, you can select this button to remove the match – this means that this pair will no longer be flagged as a match. If you make a mistake, select Restore Match before you move on to the next pair of records (or press Ctrl+Delete).



Select either of these buttons to interactively flag records for deletion (usually just in the lower scoring bands of matches). When you click on one of these buttons, it changes to a green tick. If you click on one of these buttons by mistake, just click on the green tick button to unflag the record.



This button allows you to select different fields to view in the matching pairs, or change the field order (more detail is given in *Verify Matches* in the User Manual).



This button asks *matchIT* to remember the current pair so you can return to this pair later.



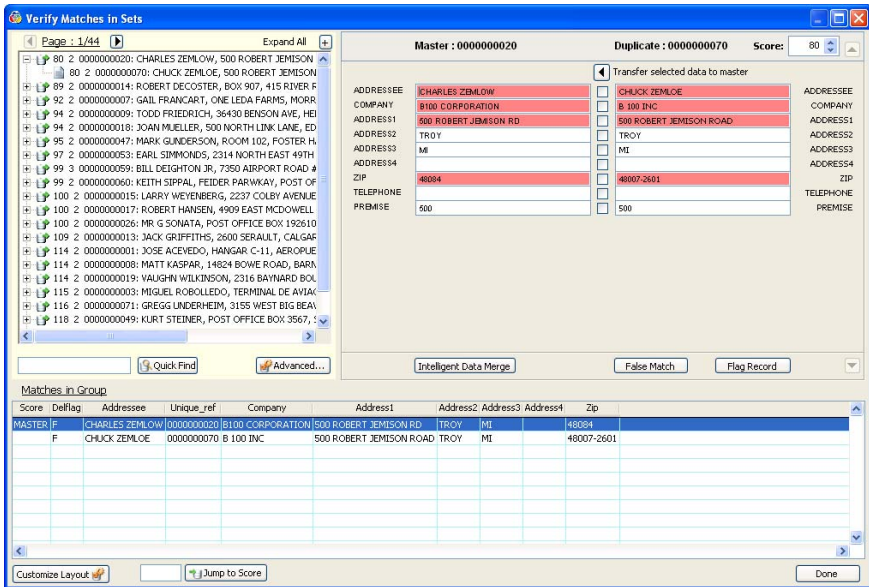
This button will return to the marked pair.



When you have finished reviewing matches, select **Done**.

This window also provides you with powerful data merging tools. Right clicking in either of the records can access these tools. You will then see a drop down menu that offers options such as copy to the left hand or right hand side, cut, paste, and **Intelligent Data Merge**. Before using the **Intelligent Data Merge** option, you must set the **Intelligent Data Merge** priorities from the Matching Setup sub-menu, located in matchIT's Jobs/Setup menu.

Verify Matches in Sets



This screen will display potential duplicates, in sets. The different coloured highlighting is used to help distinguish where the differing fields are in the records. Fields in red are different, yellow shows information which is contained in the same field in the other record and white displays those fields which are identical.

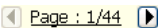
The tick boxes between matching records (in the top right part of the screen) control what information is transferred to the Master record.



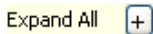
specifies what fields to transfer to the Master record.



transfers selected fields to the Master record.



goes forward to the next page of matching sets.



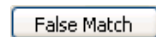
expands all matching sets shown in the current page of matching sets.

Below the matching pair display there are various buttons for dealing with that particular matched pair:

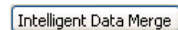


to flag the duplicate record in the pairs view section, select this button. The button then changes: to "Restore Record" which allows you to unflag the record.

False Match is Ctrl+Delete



if the pair shown is not a true match, you can select this button to remove the match – meaning that this pair will no longer be regarded as a match. The button then changes: to "Restore Match" which allows you to reactivate the displayed matching pair.



uses the Intelligent Data Merge (see Intelligent Data Merge) settings specified by the user to create a meta-record of the two records shown in the pairs section.

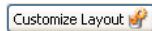
Typically, you either flag false matches in a score band if most of them are true matches, or flag the odd true match if most of them are false. You do not need to both flag false matches and flag true matches within a score band, as a global deletion will flag all matches above a match score as long as they have not been declared false. If you are using the Matrix Report or Group Matches feature, any matches you flag interactively will not be included. To allow this, you can increase the match score of any pair in the grey area, so that you move them into the area that is being automatically flagged or grouped.



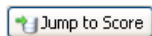
quickly find records that contain a piece of information as specified by you. The records that contain the information will then be displayed in the Verify Matches in Sets window.



customizes the "Verify Matches in Sets" window by allowing the user to apply filters and sort orders so that only records of specified concern are displayed.



allows you to enter the name or names of any additional fields that you want to see in the "Matches in Group" section. Just scroll down and type the name of the field at the end of the list. You have to know the exact spelling of the field name or it will not be displayed, but you don't have to specify the field type or width. You can also change the order in which the fields are displayed, by dragging the square button to the left of the name. Then select OK and say "Yes" to the question "Make structure changes permanent". NB: this question refers to the structure of a temporary work file, not the structure of the Main File.



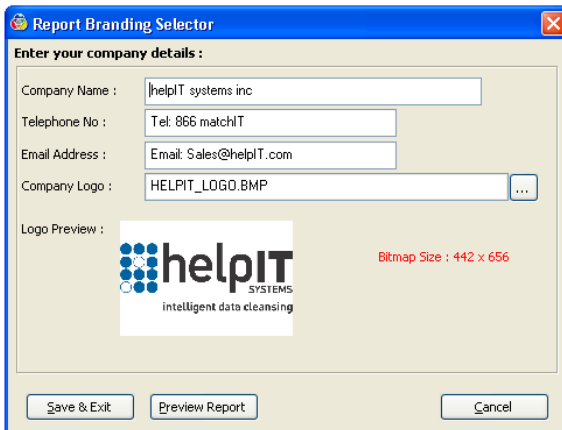
jumps to the first matching set of a specified match score.

Click "**Done**" when you have finished.

7 Modifying Reports

7.1 Report Branding

Many of the reports that are created by *matchIT* have the ability to be customized. Users can even change the company information on the report. This option is located under the **Edit** menu > **Output Layouts** as **Report Branding**. Here you can change the company name, telephone number, e-mail address, and company logo. Modifying the matchIT Logo will require that you copy your custom logo to the matchIT Directory (C:\Program Files\matchITv51).



Adding fields to an already existing or developed report is possible, but should only be attempted by advanced users. Please refer to the **User Manual** For a detailed explanation on the process used to edit a report layout.

7.2 Report Layouts

This option should be used, only, if you have experience editing reports or the document detailing the editing process. This option is located under the menu **Edit** > **Output Layouts** as

Letter/Page/Report (a file must be open or you will be prompted). This will bring up a window showing all of *matchIT*'s existing report formats. It is best to find a format that closely resembles your desired format, thus making the editing process easier. The following window will be displayed once a report is chosen. **It is best to use the *matchIT* User Manual or to visit www.helpIT.com for proper documentation when attempting this procedure.**

The screenshot shows the 'Report Designer - bizsets.frx' window. The report layout includes a title section, a main header with fields like 'Low/high Score', 'Name', 'Company', and 'Address line 1'. Below this is a 'Page Header' section, followed by a 'Group Header 1: op2_sets' section. The main body of the report is a table with columns for 'Ref', 'Score', 'Name', 'Company', 'Address line 1', and 'Address line 2'. The table is sorted by 'm.sort' from 'low' to 'high'. The footer section includes a 'Page Footer' with fields for 'Potential Deletions' and 'Number of sets of duplicates'.

8 Useful Tips

8.1 Recently Used Files

Under the **File** menu there is a list of recently used databases. This will allow you to access databases quickly, without scouring through your computers directories.

8.2 View Original File

Under the **View** menu, you will find an option to **View Text File**. If your original source file was a text file, this function will enable you to view this file.

8.3 Performance Data

The **Performance Data** function (within the **View** menu) allows you to view information on all data runs. This option will show match keys used for previous runs.

8.4 Error Log

The **Error Log** function under the **View** menu allows you to view why and where an error occurred. This is very helpful when referring your problem to tech-support. **When referring a problem please report the program used and the line number.**

8.5 Using the Print Icon

If you print a report from the printer icon in preview mode, one copy of the complete report is sent to the default printer. If however, you select **Destination: Printer** from e.g. the **View Matches** screen, you can choose which printer to use, what page range to print and how many copies you would like.

9 Common Questions

9.1 Applying a matchIT USB activation

To activate an installation of matchIT, you need to move the activation token from the helpIT USB to the matchIT installation. To do this, just insert the supplied Activation USB stick and select PrInstall.EXE within the *matchIT* directory folder and follow the onscreen directions. If you do not have an Activation USB stick, contact your supplier for one – then you can install on the new PC as normal. If you are running under Windows 2003, XP or Vista, you must have administrator rights to be able to move a token.

9.2 Moving a matchIT activation to Another PC

To move an existing installation to a new PC, you need to remove the activation token from the old PC. To do this, just insert the supplied Activation USB stick and select PrMove.EXE within the *matchIT* directory folder and follow the onscreen directions. If you do not have an Activation USB stick, contact your supplier for one – then you can install on the new PC as normal. If you are running under Windows 2003, XP or Vista, you must have administrator rights to be able to move a token.

9.3 matchIT's Online FAQ

To view common questions and answers please access the FAQ within *matchIT*'s **Help** menu.