

Information Steward

Merge Match Groups



You have logged onto Information Steward as Mark, a regional expert for North America. You want merge two match groups.

ew_VENDOR_2012_BATCH1

Match Group List

Open History Filter Criteria Filter by Status Refresh More

Match Groups: 50 of 967

Group	Emb	Status	Reco	Vendor Na	Street Ad	City	State	Zip	Region	Country	Registratio	Renewal C	Update	Updated	Comment	Assigned To
102102				NORTHWE	7272 W M	SEATTLE	WA	98108-41	West	UNITED ST	2002/04/0	2009/04/0		6/27/201		Western, Mary,
1022185		For Re	5	B-C-D MET	205 MAPO	MALDEN	MA	21485	North East	UNITED ST	2001/05/1	2013/04/1		6/27/201		Amy, Eastern, f
1023704		For Re	3	BARRY WF	82 SOTH S	HOPKINTC	MA	17442	North East	UNITED ST	2002/09/0	2013/11/2		6/27/201		Amy, Eastern, f
10273514		For Re	4	SHIVE-HA	2834 NOR	IOWACY	IA	52245-95	Mid West	UNITED ST	2002/03/2	2011/07/0		6/27/201		Minno, Wisco, M
103322058		For Re	3	AMERICAN	5 PE LN	DOVER	NH	38200	North East	UNITED ST	2002/02/2	2013/10/1		6/27/201		Amy, Eastern, f
1038103		For Re	2	LS TECHN	2750 PRO	FAIRFA	VA	2231	South	UNITED ST	2001/10/2	2012/08/2		6/27/201		Austin, Dallas, f
1043496		For Re	6	DURANT P	112 RAID	REVERE	MA	21514	North East	UNITED ST	2003/08/1	2013/01/2		6/27/201		Amy, Eastern, f
1050152		For Re	4	EMD COR	290 CONC	BILLERA	MA	18213	North East	UNITED ST	2002/04/0	2013/12/0		6/27/201		Amy, Eastern, f
10507403		For Re	2	ENVIROSY	23 E AVE	FLAGSTAF	AZ	86000	West	UNITED ST	2001/10/1	2010/06/0		6/27/201		Western, Mary,
1051437		For Re	3	DIVISION2	UNITY AV	SAINT UL	MN	55130	Mid West	UNITED ST	2007/03/0	2012/06/2		6/27/201		Minno, Wisco, M
1055318		For Re	4	BOMCO, II	125 GLTER	GLOUSTER	MA	19300	North East	UNITED ST	2001/06/2	2013/06/1		6/27/201		Amy, Eastern, f
10624526		For Re	2	GOVERNME	18526 W	SENER	CO	80226	West	UNITED ST	2002/02/4	2012/02/4		6/27/201		Western, Mary,

Click Open.

1 of 20

Close

You know that this vendor has been mentioned slightly differently in some records and those records may not have matched in this group. You want to move in those records.

mark records match/unmatch/move as applicable. Reassign the master record, if applicable, when it is allowed. Click Next and complete Step 2 to create the

le Matches

Match Unmatch Assign as Master Compare to Master Add Note Move Records Display K

Match Status	Match Score ▲	Source System	Vendor Name	Street Address	City	State	Zip
Master		ECC_INTERPID_179	AMERICAN TONERS, LLC	5 PE LN		H	38200
<input checked="" type="checkbox"/> Match	87	ECC_INTERPID_179	AMERICAN TONERS,	5 PENNY	DOVER	NH	38200
<input checked="" type="checkbox"/> Match	95	ECC_HORNET_12	AMERICAN TONERS, LLC	5 PE LN	DOVER	NH	38203





Click Move Records.


Next

Confirm Matches (1 of 2)

Review the matches below and mark records match/unmatch/move as applicable. Reassign the master record, if applicable, when it is allowed. Click Next and complete Step 2 to create the

Master Record and Possible Matches

✓ Match ✗ Unmatch  Assign as Master  Compare to Master  Add Note  Move Records Display K

Match Status	Match Score ▲	Source System	Vendor Name	Street Address	Move Out	State	Zip
 Master		ECC_INTERPID_179	AMERICAN TONERS, LLC	5 PE LN	Move In	NH	38200
✓ Match	87	ECC_INTERPID_179	AMERICAN TONERS,	5 PENNY	Move To Original Group	NH	38200
✓ Match	95	ECC_HORNET_121	AMERICAN TONERS, LLC	5 PE LN	Select Move In.	NH	38203

Next

For this tutorial the search criteria have been entered for you.

Target Match Group

Group Number	Status	Record Count	Vendor Name	Street Address	City	State
103322058	For Review	3	AMERICAN TONERS, LLC	5 PE LN	DOVER	NH

Search and select the records to move to the target match group:

AND [X] Vendor Name CONTAINS American

Select field Select filter condition Set filter value

Search

Click Search.

Add a filter criteria and click Search to load records

OK Cancel

In order to merge the two groups, select the Master Record of American LLC group.

Group Number	Status	Record Count	Vendor Name	Street Address	City	State
103322058	For Review	3	AMERICAN TONERS, LLC	5 PE LN	DOVER	NH

Search and select the records to move to the target match group:

Search criteria: Vendor Name CONTAINS American AND State EQUALS NH

Select field: Select filter condition: Set filter value

Group Number	Match Status	Match Score	Source System	Vendor Name	Street Address	City	State
1150978	Master		ECC_INTERPID_17%	AMERICAN LLC	5 PEN	DOVER	NH
1150978	Match	90	ECC_INTERPID_17%	AMERICAN LLC	5 PEN	DOVE	NH

Select the Master record.

Move Records In to Match Group 103322058

Target Match Group

Group Number	Status	Record Count	Vendor Name	Street Address	City	State
103322058	For Review	3	AMERICAN TONERS, LLC	5 PE LN	DOVER	NH

Search and select the records to move to the target match group:

AND Vendor Name CONTAINS American

State EQUALS NH

Select field Select filter condition Set filter value

Group Number	Match Status	Match Score	Source System	Vendor Name	Street Address	City	State
1150978	Master		ECC_INTERPID_17%	AMERICAN LLC	5 PEN	DOVER	NH
1150978	Match	90	ECC_INTERPID_17%	AMERICAN LLC	5 PEN	DOVE	NH

Click OK.

OK Cancel

Move Records In to Match Group 103322058

Target Match Group

Group Number	Status	Record Count	Vendor Name	Street Address	City	State
103322058	For Review	3	AMERICAN TONERS, LLC	5 PE LN	DOVER	NH

Search and select the records to move to the target match group:

Search criteria: Vendor Name CONTAINS American

AND

Search

Group Number	Match	Record Count	Vendor Name	Street Address	City	State
1150978						NH
1150978	✓ Match	90	ECC_INTERPID_17% AMERICAN LLC	5 PEN		NH

Warning

⚠ Moving the master record will move all the records in that group. The group will become obsolete and unavailable. Are you sure you want to continue?

Yes No

Click Yes.


OK Cancel

Confirm Matches (1 of 2)

Review the matches below and mark records match/unmatch/move as applicable. Reassign the master record, if applicable, when it is allowed. Click Next and complete Step 2 to create the

Master Record and Possible Matches

Match Unmatch Assign as Master Compare to Master Add Note Move Records Display K

Match Status	Match Score ▲	Source System	Vendor Name	Street Address	City	State	Zip
 Master		ECC_INTERPID_179	AMERICAN TONERS, LLC	5 PE LN	DOVER	NH	38200
<input checked="" type="checkbox"/> Moved In		ECC_INTERPID_179	AMERICAN LLC	5 PEN	DOVER	NH	38203
<input checked="" type="checkbox"/> Moved In		ECC_INTERPID_179	AMERICAN LLC	5 PEN	DOVE	NH	38203
<input checked="" type="checkbox"/> Match	87	ECC_INTERPID_179	AMERICAN TONERS,	5 PENNY	DOVER	NH	38200
<input checked="" type="checkbox"/> Match	95	ECC_HORNET_121	AMERICAN TONERS, LLC	5 PE LN	DOVER	NH	38203

Click Next.

Next

Commit the changes made to the match group.

122058: Locked for review by Mark on 6/27/2013 7:47 AM

About this tutorial

Off

To edit the best record, drag and drop information from source records or edit the field directly. The source for the best record appears emphasized in each column.

Best Record

Reset

Add Note

Display Key Fields Only Scroll Together

Match Status	Match Score	Source System	Vendor Name	Street Address	City	State	Zip
			AMERICAN TONERS, LLC	5 PE LN	DOVER	NH	38200

Source Records

Compare To Best Record

Match Status	Match Score ▲	Source System	Vendor Name	Street Address	City	State	Zip
Master		ECC_INTERPI...	AMERICAN TONERS, LLC	5 PE LN	DOVER	NH	38200
✓ Moved In		ECC_INTERPI...	AMERICAN LLC	5 PEN	DOVER	NH	38203
✓ Moved In		ECC_INTERPI...	AMERICAN LLC	5 PFN	DOVE	NH	38203

Comments

Click Finish.

Previous

Finish

Skip Group

Tasks VendorDataReview_VENDOR_2012_BATCH1

Match Group List

Open History Filter Criteria Filter by Status Refresh More

Match Groups: 50 of 965

Group Number	Status	Records	Vendor Name	Street Address	City	State	Zip	Region	Country	Registration	Renewal Date	Update	Updated	Comment	Assigned To	
13536359	For Review	5	DOUBLE C	1050 WOOD	KINGSTOWN	TN	3782	South	UNITED STATES	2008/02/0	2013/05/2		6/27/201		Austin, Dallas, f	
1356872	For Review	3	IRA GREEN	177 GEOR	PROVIDENCE	RI	29054	North East	UNITED STATES	2002/01/0	2013/06/0		6/27/201		Amy, Eastern, f	
1367122	For Review	2	NATIONAL	584 MAIN	SOUTH PORT	ME	41065	North East	UNITED STATES	2005/04/1	2009/03/1		6/27/201		Amy, Eastern, f	
136763195	For Review	2	JM GRAIN	12 N ST	GARRON	ND	58540	Mid West	UNITED STATES	2004/01/0	2013/03/2		6/27/201		Minno, Wisco, M	
1368141	For Review	6	LINDE	575 MOUN	MURRAYH	NJ	79744	North East	UNITED STATES	2002/02/2	2012/02/1		6/27/201		Amy, Eastern, f	
1370857	For Review	3	ALBEST ME	1 KENT AV	BROOKLYN	NY	11211-10	North East	UNITED STATES	2001/08/0	2013/08/0		6/27/201		Amy, Eastern, f	
1376565	For Review	6	STAR BAG	94 N 13TH	BROOKLYN	NY	11249-10	North East	UNITED STATES	2002/01/0	2014/01/1		6/27/201		Amy, Eastern, f	
1393																
1406																
1411																
1414																

You have successfully merged two match groups.

End of tutorial

Close