



Version 1.3.0

SalesLogix Data Evaluation Guide

Document Version 1.0





QGate
D2 Fareham Heights
Standard Way, Fareham
Hampshire UK PO16 8XT
Tel +44(0) 1329 825500
Fax +44(0) 1329 826600
info@QGate.co.uk

QWare components are products of QGate Software Limited.
©QGate Software Limited. All rights reserved

Notices

Copyright Information

This document and all subject matter outlined within this document remain the copyright of QGate Software Limited. It may not be reproduced in part or whole or any manner, digitised, transcribed, translated or mass distributed without written permission from QGate Software Limited.

© 2004 Copyright QGate Software Limited

Trademarks

Paribus is a trademark of QGate Software Limited.

QMatch+ is a trademark of QGate Software Limited.

Microsoft is a registered trademark of Microsoft Corporation.

All rights reserved.

Disclaimer

This document is written solely to provide a quick-start to evaluate SalesLogix data – not to include any updates.

Although every effort has been made to ensure the processing performed by this software product will not damage or corrupt your data, we strongly recommend you perform the following actions to safeguard against such eventualities.

In the unlikely event that data becomes lost or corrupted, QGate Software Limited cannot be held responsible.

Recommended Safeguards

Perform a complete backup of any host database(s) to which Paribus connects to obtain match data.

Note: Paribus does not alter any data in host databases as part of the matching and review process. Changes are only made by subsequent updates / imports via Paribus Plug-in Tools – which are NOT included with the Evaluation License.

If possible, perform any match processes using live databases outside of normal operational hours.

Table of Contents

Notices	3
Copyright Information.....	3
Trademarks.....	3
Disclaimer	3
Table of Contents	4
Overview	6
Other Related Information.....	6
About Paribus	7
Intelligent Matching with QMatch+	7
Phonetic Matching.....	8
Matching Synonyms	8
Sequence Variation Matching	8
Sanitization	8
Data Segmentation.....	8
Case and Spelling	9
International Language Support.....	9
System Requirements	10
Computer Hardware (Paribus Client Application).....	10
Supported Operating Systems	10
Required Supporting Software	10
Paribus Installation	11
Installing the Paribus Application	11
Paribus Control Database Creator	14
Starting Paribus	17
Launching the Application	17
Logging into the Paribus Control Database.....	17
Paribus Assistant	18
Importing Paribus Definitions	19
Defining a Paribus Data Provider for SalesLogix.....	20
SalesLogix Running on Microsoft SQL Server	20
SalesLogix Running On Oracle.....	23
Configuring Your Paribus Data Provider.....	25
Paribus Definitions Overview	27
Match Sessions.....	27
Match Sets.....	27
Match Conditions	27
Data Sets	27
Data Providers	27
Review Match Session Settings	28
Running the Paribus Application to Evaluate Data	30

Reviewing Your Paribus Match Results	31
Processing Your Paribus Match Results	32
Notes for Evaluating Multiple Clients' Data	33
Achieving Effective and Efficient Matching.....	34
1. Use Multiple Match Process Passes for Best Results	34
2. Use Match Conditions	34
3. If no Match Conditions are used, increase Match Set Threshold.....	35
4. Use of 'Extended Matching'	35
5. Use 'Log Unmatched Records' with care.....	35
6. Select Data Set fields and joins with care.....	35
7. Index the underlying data tables	35
8. Set Paribus Match Dictionary rules carefully	36
Paribus – Troubleshooting.....	37
Unable to Connect to my Paribus Control Database	37
I don't get any Matches when I run my Match Session	37
Paribus – Technical Support.....	38
General	38
Fault Reporting	38

Overview

This document is a guide to the basic process for installing Paribus and running Match Sessions for the sole purpose of providing descriptive results with which to evaluate the quality of SalesLogix data. This document should not be used to install a licensed copy of Paribus. Please refer to the Paribus Getting Started Guide for full licensed product installation.

This guide outlines the following:

- About Paribus and QMatch+
- System Requirements
- Installation and configuration of Paribus
- The Paribus Control Database
- Overview of Paribus Definitions
- Basic guide to defining and running a Paribus Match Process
- Introduction to achieving effective matching
- Reviewing and presenting Results
- Troubleshooting

Other Related Information

For further information on using Paribus, see the Paribus product online help and the Paribus Getting Started Guide and the Paribus for SalesLogix - User Guide.

About Paribus

Paribus is a sophisticated application for intelligently matching business information such as Company Names, Person Names and Addresses etc, for the purposes of identifying similarities in corporate customer information.

The name **Paribus** comes from the Latin, meaning "All Things Equal".

Using the sophisticated matching capabilities of QGate Software's **QMatch+** matching technology (see below), Paribus is able to identify matches in data based on phonetic likenesses, synonyms and name variations; irrespective of word segmentation, noise words, spelling errors and even word sequencing.

Paribus is able to match on any combination of data, with the added ability to combine multiple elements into a single match process (i.e. the ability to match a person's name with matching address elements and company associations).

Furthermore, Paribus enables you total flexibility to control how you weigh the significance of the elements on which you match. For example, you can denote a match performed on personal names to be a 'close match', and the match performed on related address to be 'relaxed'.

Once Paribus has identified matches within your data, Paribus will present a summary report of the matches found. This report details the number of records processed and the number of matches found.

In addition, Paribus provides the ability to review the matches found in detail, together with information about each matched item and the match score it obtained (degree of likeness). The review process enables the user to view each match found, altering the results if required, before processing / exporting the results from Paribus.

Finally, once matches have been established and reviewed, Paribus provides a variety of tools and plug-ins with which to process the match results against your data. These tools include the ability to export the match results for processes against legacy systems and proprietary applications. One very powerful plug-in is specifically designed to work with SalesLogix (v4 and later).

Intelligent Matching with QMatch+

Powered By
QMatch+

Paribus' matching capabilities are powered by QGate Software's intelligent matching technology – **QMatch+**. QMatch+ is a sophisticated matching algorithm that is able to intelligently identify matches within data based on phonetic likenesses, synonyms and name variations; irrespective of word segmentation, noise words, spelling errors and even word sequencing.

Phonetic Matching

QMatch+ is able to match data based upon phonetics, such as:

- **Photo Centre**, Foto Center
- **Robert Stephenson**, Bob Stevenson, Bobbie Stevensen
- **Sherly Wyiatt**, Cheryl Wiatt, Sheral Whiat

Matching Synonyms

QMatch+ provides support for matching synonyms, such as:

- **Robert**, Bob, Bobbie, Rob, Robbie, Roberto
- **William**, Will, Willy, Bill, Billy
- **Richard**, Rich, Ric, Dick
- **Geoff**, Jeff
- **Lewis**, Alois, Alos, Aloysius (*international names*)
- **Eugene**, Eugenijus, Eugenio, Eugenius, Eugenios (*international names*)
- **Frank**, Franck, Franko, Fransois, Frankiskos (*international names*)
- **International Business Machines**, IBM, I.B.M.

Sequence Variation Matching

QMatch+ provides a unique feature of identifying matches regardless of the sequence and extent of the words and/or names contained – a technique we call Sequence Variation, such as:

- **University of Florida**, Florida University
- **1st National Bank of Arizona**, Arizona First National Bank
- **West Midlands Police**, West Midlands and District Metropolitan Police

Sanitization

As part of the match process performed by **QMatch+**, is a technique called **Sanitization**. This is where certain words and abbreviations are managed (some excluded, some elaborated) to ensure that all possible permutations are handled in the match process. Examples are:

- **Corporation**, Corp
- **Limited**, Ltd, Ltd.
- **University**, Uni

Data Segmentation

QMatch+ provides a unique feature of matching names regardless of segmentation (spaced/punctuated words), such as:

- **QGate Software**, Q Gate Software, Q-Gate Software
- **3Com**, 3 Com, 3-Com
- **GuideMark**, Guide Mark, Guide-Mark

Case and Spelling

QMatch+ is able to match data regardless of certain spelling variations, and variations in case, such as:

- **University of London**, Univercity of Londen
- **NewMarket Partners**, NuMarket Partners
- **Geoff Cooper**, Jeff Couper
- **MCManiman**, McManimann

International Language Support

QMatch+ provides support for international language as standard. With its open match rules engine, QMatch+ combines international language support seamlessly into each of its match processes.

Uniquely, **QMatch+** does not require additional languages to be selected explicitly, as it is believed this is not always feasible for an application such as Paribus to determine which language set to use when performing matches.

System Requirements

Recommended minimum system requirements for the Paribus application are:

Computer Hardware (Paribus Client Application)

- Pentium based PC
- Minimum of 64MB of memory (128MB+ recommended)
- 10Mb of free disk space
(product installation only – Paribus Control Database size will vary)
- 16-bit graphics capabilities

Supported Operating Systems

- Microsoft Windows 98
- Microsoft Windows NT
- Microsoft Windows 2000
- Microsoft Windows XP

Required Supporting Software

- Microsoft SQL Server – version 7 or 2000

Note: Paribus also supports Microsoft SQL Server Desktop Edition (MSDE), which is freely available from the Microsoft Web site (URL current at this time is:

<http://www.microsoft.com/sql/msde/downloads/default.asp>)

Paribus also requires the following supporting software components, also readily available from the Microsoft Web site.

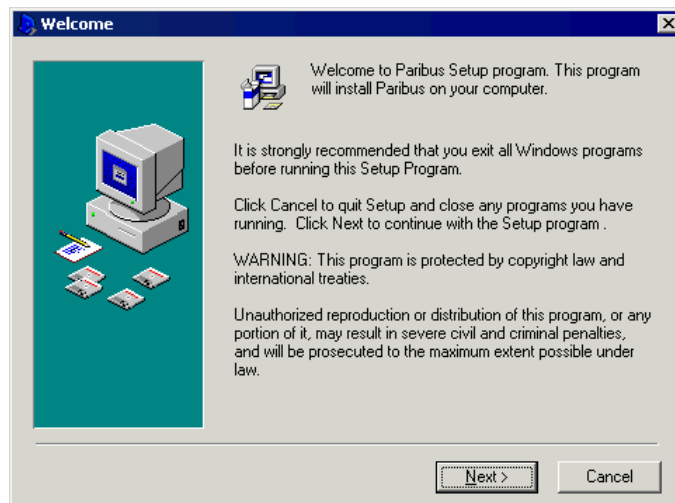
- Microsoft Internet Explorer – version 5 or above
- Microsoft Data Access Components (MDAC) – version 2.6 or above

Paribus Installation

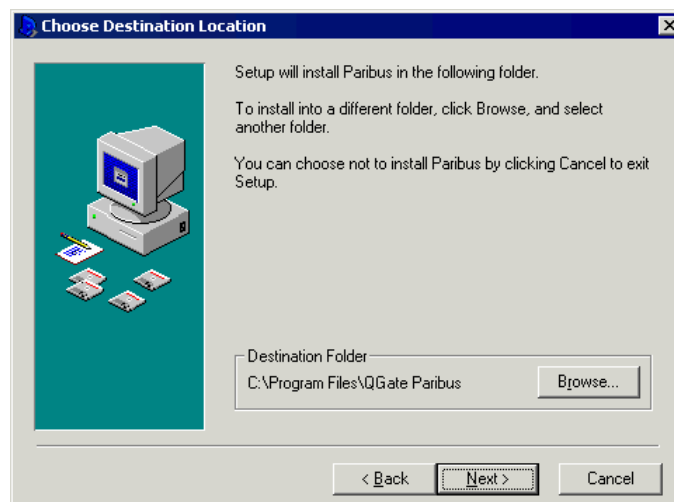
Installing the Paribus Application

Installation of the Paribus application is completed by use of an install wizard.

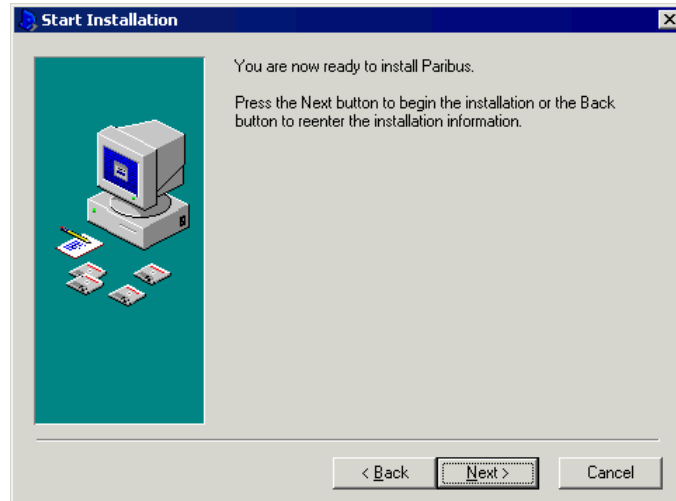
- 1) Locate the **Setup.exe** file from the Paribus download.
- 2) Double click on the **Setup.exe** file
- 3) From the **Welcome** dialog, click on the **Next >** button



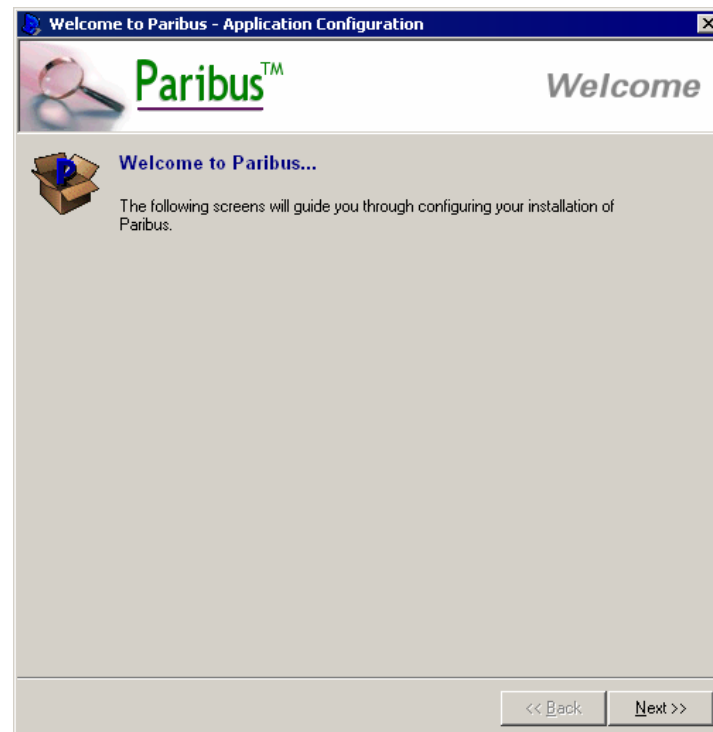
- 4) From the **Choose Destination Location** dialog, click on the **Next >** button to accept the default destination folder or click on the browse button to locate an alternative path and folder.



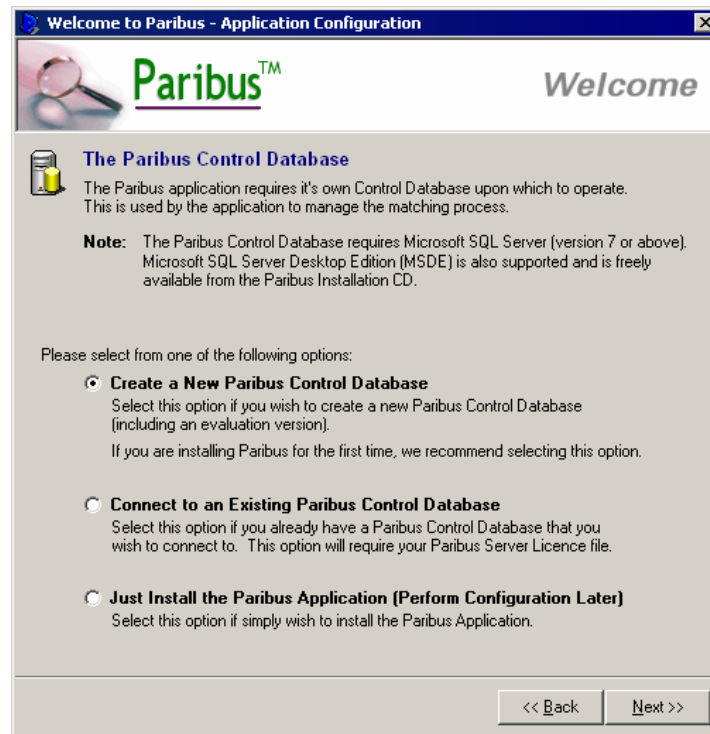
- 5) On the **Start Installation** dialog, click the **Next >** button to begin the installation.



- 6) On the **Welcome to Paribus – Application Configuration** dialog, click **Next >>** to begin configuring your installation of Paribus.



- 7) On the Paribus Control Database dialog, select Create a New Paribus Control Database:



Create a New Paribus Control Database

- 8) Select this option to create a new Paribus Control Database. On selecting this option and clicking the **Next >>** button will display the **Paribus Control Database Creator**.

Paribus Control Database Creator

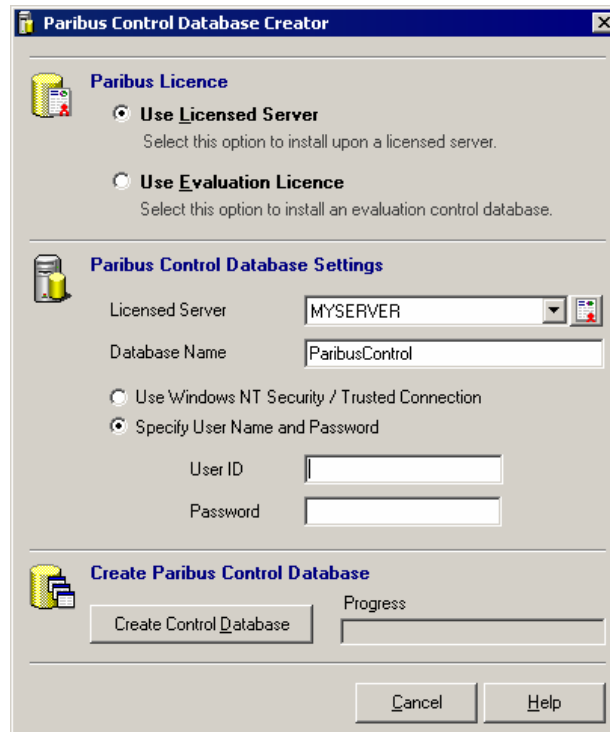


Figure 6 - Paribus Control Database Creator

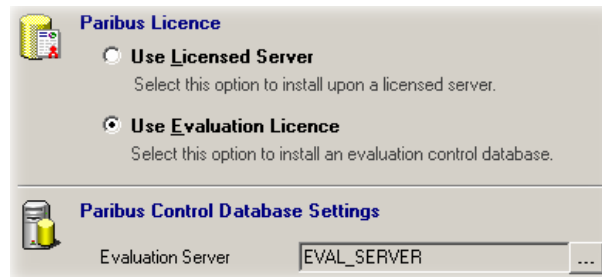


Figure 7 - Paribus Control Database Creator (Use Evaluation License)

The **Paribus Control Database Creator** provides the ability to generate new Paribus Control Databases within a specified Microsoft SQL Server (including MSDE).

- 9) Select **Use Evaluation License** in the **Paribus Licence** section and you are prompted to enter the server name in the displayed dialog window.

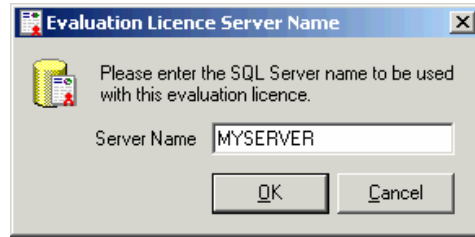


Figure 8 - Evaluation License Server Name

Database Name

The Database Name is the name you wish to call your new Paribus Control database. By default, this will be named *ParibusControl*. Subsequent control databases generated on the *same* server must have unique names.

Note: If you will be using Paribus to evaluate SalesLogix databases from multiple clients, please see the special instructions on page 33 before deciding on a Paribus Control database name.

Use Windows NT Security / Trusted Connection vs. Specify User Name and Password

A connection can be made to a SQL Server database either by using the login credentials of the client machine if that Windows logon has access rights to the SQL Server database or by explicitly specifying a SQL Server User ID and Password. Select the appropriate option to allow connection to the required SQL Server (see your Systems Administrator for assistance, if necessary).

Note: Whichever login method is used, the login user must have the appropriate privileges to create databases on the specified database server. If appropriate, this can be the database administrator User ID.

User ID

If **Specify User Name and Password** has been selected, enter the User ID required by your database server to log into and create the Paribus Control Database.

Note: The SQL Server default system administrator ID is **sa**.

Password

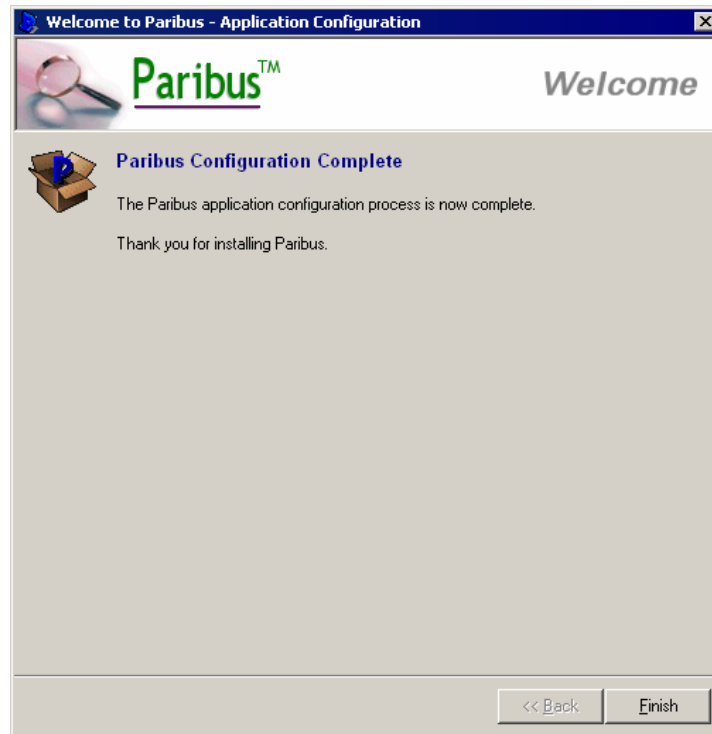
If **Specify User Name and Password** has been selected, enter the Password required by your database server to log into and create the Paribus Control Database.

Create Control Database

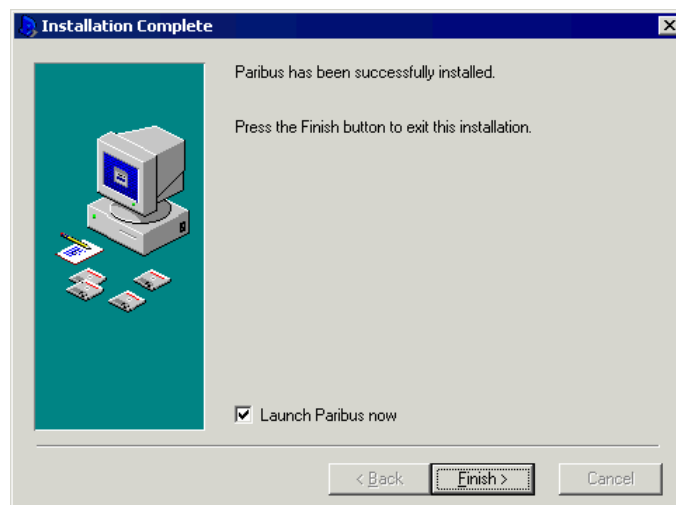
Clicking the **Create Control Database** button will automatically create a Paribus Control Database, based upon the database details and login credentials specified.

10) When completed, click OK and then click Close to close the Paribus Control Database Creator dialog.

- 11) Once configuration is complete, click the **Finish** button to close the Paribus configuration window.



- 12) Click the **Finish** button on the **Installation Complete** dialog to exit the installation (optionally launching the Paribus application).



- 13) Click on the **Yes** button if prompted to restart your PC.

Starting Paribus

Launching the Application

Paribus can be launched from the Paribus Application Icon.



Paribus

- 1) Windows Start Menu: Programs → QGate Paribus → Paribus

Logging into the Paribus Control Database

- 2) Upon launching Paribus, you will typically be presented with the **Login To Paribus Control Database** window, as shown below.



Figure 11 - Paribus Control Database Login

- 3) This dialog provides the means of connecting to your Paribus Control Database. The Server Name and Database Name details will already be defined. Select the Authentication method (and enter a valid User Name and Password if necessary) and click **OK**.

Paribus Assistant

When you log in to your new Paribus Control Database (or one containing no Match Sessions), the Paribus Assistant is displayed automatically, as shown below. QGate provides a very comprehensive set of definitions pre-built specifically for the use of Paribus with SalesLogix. We will use these pre-built definitions to help you get up-and-running very quickly with Paribus.



Figure 12 - Paribus Assistant

- 4) **Define Paribus Definitions** – This option would be used if you wished to define your Paribus definitions manually. For this exercise, we will not be creating new definitions, rather using pre-created definitions.
- 5) **Import Paribus Definitions** – We will use this option to import a set of pre-defined Paribus definitions provided in your Evaluation Kit. Click the **Import Definitions...** button to display the **Import Paribus Definitions** dialog.

Importing Paribus Definitions

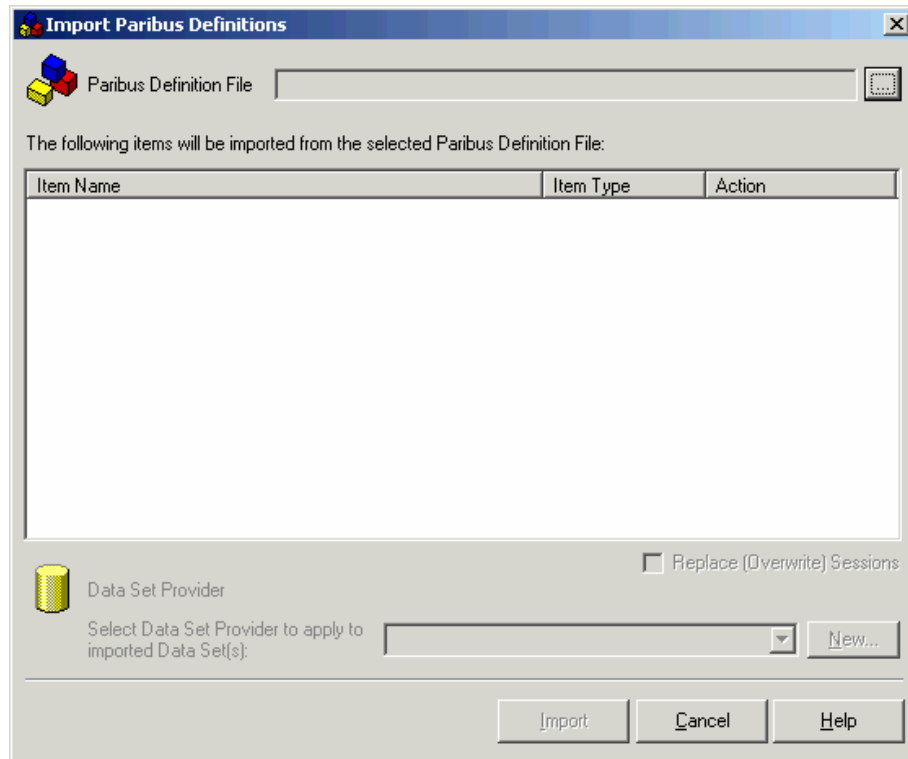


Figure 13 - Import Paribus Definitions Dialog

- 6) Select the Paribus Definition file you wish to import by clicking the ellipsis (...) button.

Note: This action will happen automatically when first entering this dialog.
- 7) From the **Select Paribus Definition File** dialog, select the Paribus Definition file you wish to import. Paribus Definition files have been included with your Paribus for SalesLogix Evaluation Kit. Select the appropriate set of definitions for the SalesLogix server platform (Oracle or SQL Server) you wish to use.
- 8) Once selected, on returning to the **Import Paribus Definitions** dialog the main list should contain the definition items you wish to import.
- 9) **Data Set Provider:** When importing Data Sets, these will require a Data Set Provider to provide them a connection to a SalesLogix database.
- 10) Since you're just starting, an appropriate provider is not yet available, so clicking the **New...** button will enable you to create a new Data Provider.

Defining a Paribus Data Provider for SalesLogix

To enable Paribus to match the data contained within your SalesLogix database, you must define the source of that data. This is achieved by defining a Paribus Data Provider.

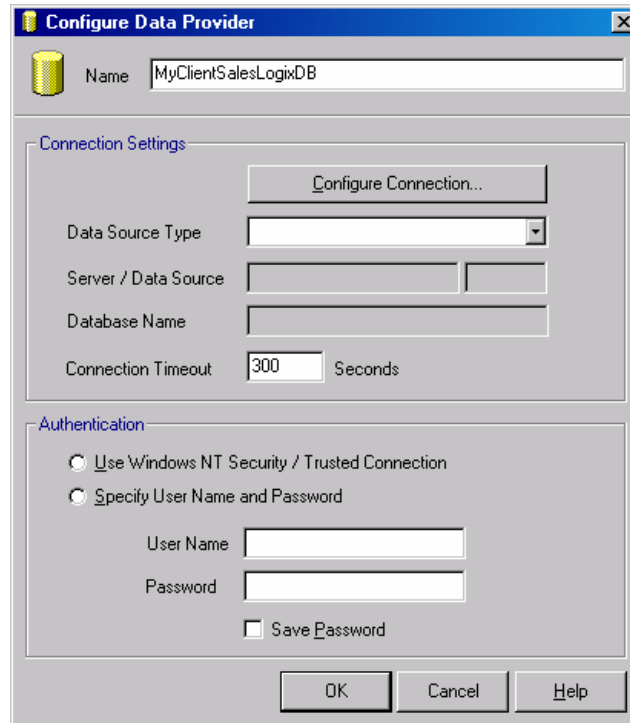


Figure 14 - Configure Data Provider Dialog

This dialog provides the means of defining the connection to your SalesLogix database, based upon either a Microsoft SQL Server connection or Oracle connection.

- 1) Give your Data Provider a meaningful name (if this is your client's data we recommend denoting SalesLogix and the Client name in the name field for future reference).
- 2) Select the **Configure Connection...** button to begin defining the connection to your SalesLogix database. Based upon the database technology that is hosting your SalesLogix database, select from one of the following:

SalesLogix Running on Microsoft SQL Server

- 3) If your SalesLogix database is running on Microsoft SQL Server, continue on within this section. If your SalesLogix database is running on Oracle, turn to page 23.

- 4) From the **Data Link Properties** dialog, Provider tab, select the *Microsoft OLE DB Provider for SQL Server* provider.

Important Warning! – Do not select the *[SalesLogix – OLE DB Provider]*, as it is not necessary for Paribus to access the data using this provider.

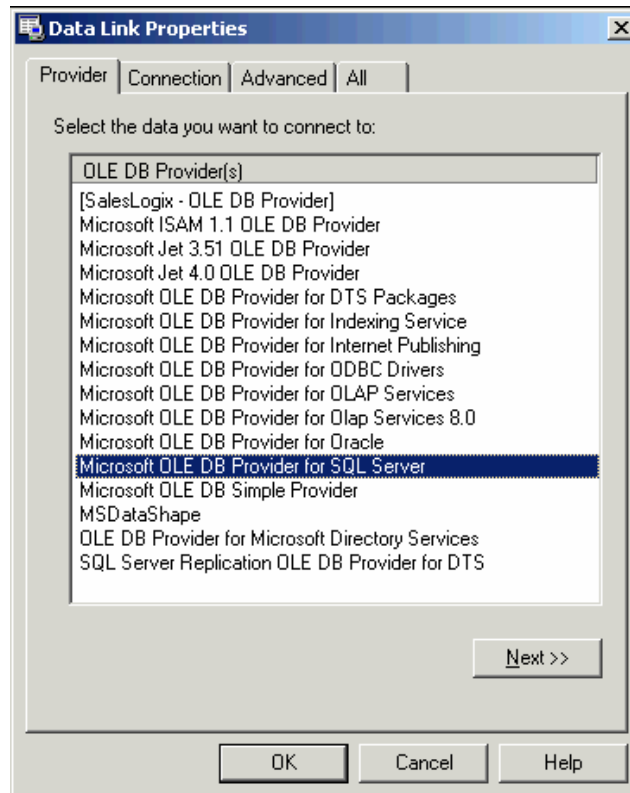


Figure 15 - Data Link Properties Dialog - Provider Tab

- 5) Once you have selected the provider, click **Next >>**.

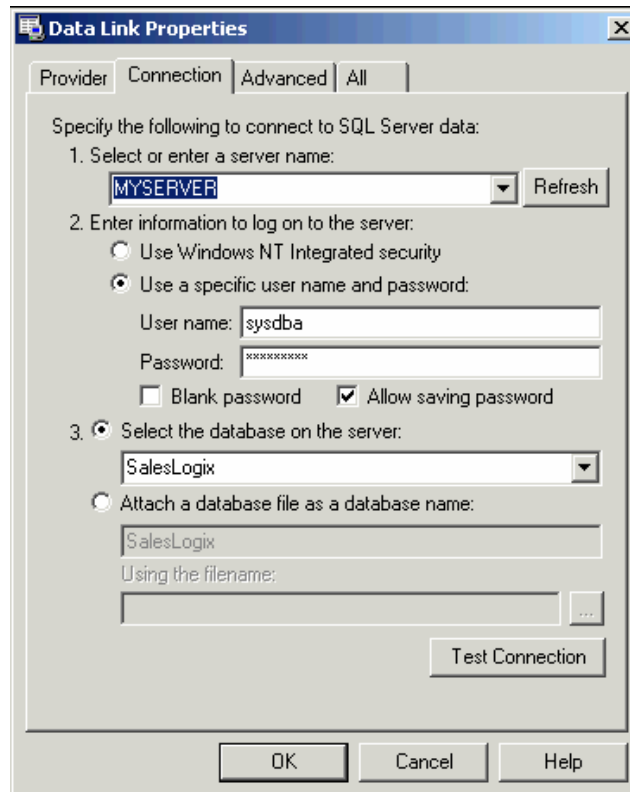


Figure 16 - Data Link Properties Dialog - Connection Tab

- 6) From the Connection Tab, complete the following details relating to the SQL Server hosting your SalesLogix database:
- 7) **Server Name:** This is the name of the SQL Server machine hosting SalesLogix (likely NOT the server hosting the Paribus Control Database).
- 8) **Logon Information:** Select the “Use a specific user name and password:” option, and specify the user name **sysdba** and password **masterkey**.
- 9) **Allow saving password:** Selecting this option avoids users needing to know or remember this when later performing a match process.
We recommend checking this option.
- 10) **Database on the server:** Select your SalesLogix database from the drop-down list.
- 11) **Test Connection:** Use this button to test that your connection details are valid and correct.
- 12) If tested successfully, click the **OK** button to return to the **Configure Data Provider** dialog to continue configuring your Data Provider – see page 25.
- 13) If your test was not successful, contact your SalesLogix systems administrator or consult your SQL Server documentation.

SalesLogix Running On Oracle

- 14) If your SalesLogix database is running on Oracle, continue on within this section. If your SalesLogix database is running on Microsoft SQL Server, turn to page 20.
- 15) From the **Data Link Properties** dialog, Provider tab, select the *Oracle Provider for OLE DB* provider (as supplied by Oracle).

Important Warning! – We recommend using the Oracle supplied *OLE DB Provider*, however should you encounter difficulties we then suggest using the Microsoft supplied *Oracle OLE DB Provider*.

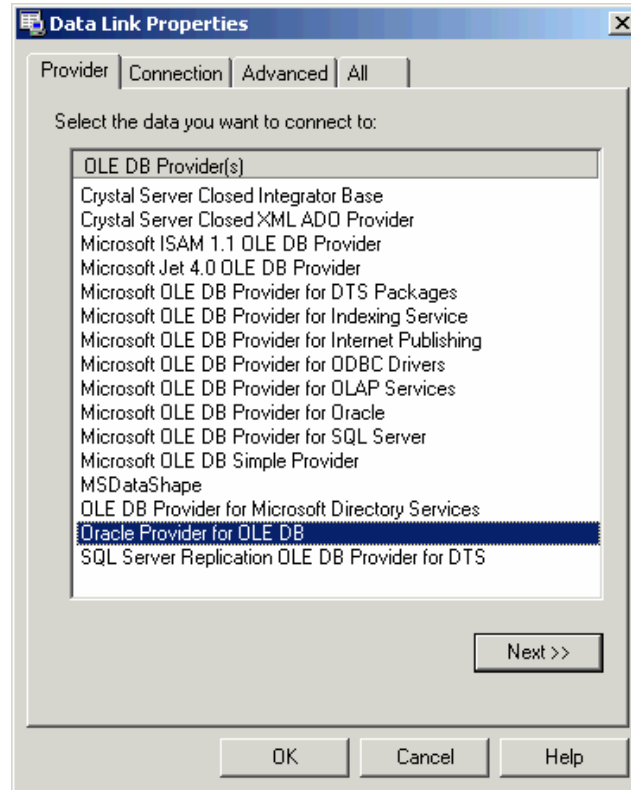


Figure 17 - Data Link Properties Dialog - Provider Tab

16) Once you have selected the provider, click **Next >>**.

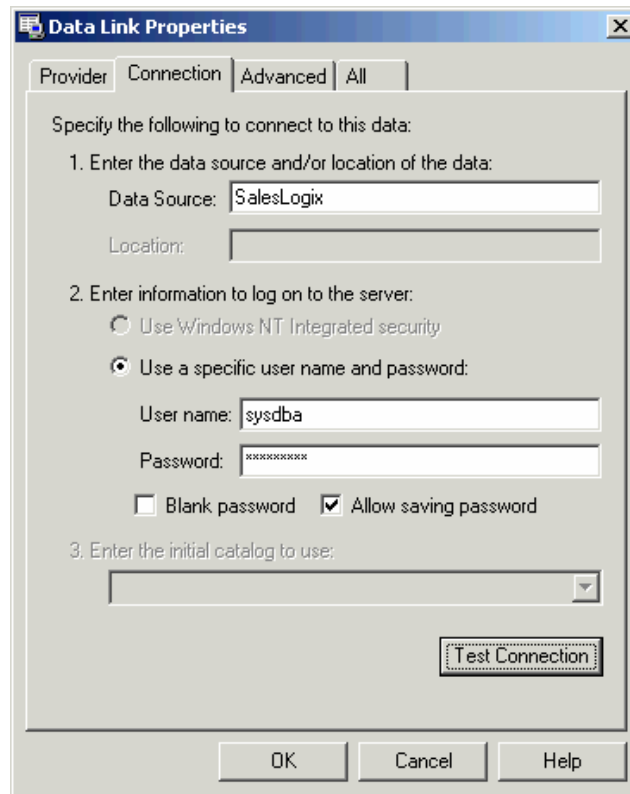


Figure 18 - Data Link Properties Dialog - Connection Tab

17) From the Connection Tab, complete the following details relating to the Oracle Server hosting your SalesLogix database:

Data Source: This is the Oracle Alias name defined within your Oracle client setup (**tnsnames**).

18) **Logon Information:** Select the “Use a specific user name and password:” option, and specify the user name and password that owns your SalesLogix database (this is typically **sysdba** and password **masterkey**).

19) **Allow saving password:** Selecting this option avoids users needing to know or remember this when later performing a match process.
Recommend checking this option.

20) **Test Connection:** Use this button to test that your connection details are valid and correct.

21) If tested successfully, click the **OK** button to return to the **Configure Data Provider** dialog to continue configuring your Data Provider – see page 25.

22) If your test was not successful, contact your SalesLogix systems administrator or consult your Oracle documentation.

Configuring Your Paribus Data Provider

- 1) Once you have successfully configured the connection details of your Paribus Data Provider, you are now ready to define the additional settings.

Data Provider Connection Settings

Figure 19 - Connection Settings of Data Provider

- 2) This section outlines the Connection Settings information as defined in the section above. To change these details, click the **Configure Connection...** button.
- 3) The **Connection Timeout** value denotes the number of seconds a database transaction has to complete before it is deemed to be not responding. The default value is 300 seconds (5 minutes), however on large databases this value may need to be increased if timeout issues occur.

Data Provider Authentication

Figure 20 - Authentication Details of Data Provider

- 4) This section denotes the authentication details required to connect to your SalesLogix database. This should always be the SalesLogix administration ID (e.g. **sysdba**), and not a SalesLogix username.
- 5) The use of **NT Security / Trusted Connections** (SQL Server only) is not supported when connecting to SalesLogix databases.
- 6) The **Save Password** option enables the password to be saved within the Data Provider definition, and prevents a password prompt being displayed any time the password is required. Please note that saved passwords are stored securely under encryption.
- 7) For more information on configuring Data Providers, see the Paribus on-line help information.

- 8) Click the **Import** button to import the selected Paribus Definitions.
- 9) Click **OK** when the import has successfully completed.
- 10) Click **Close** to close the Import Paribus Definitions screen and you will be presented with the Paribus Main Application Window.

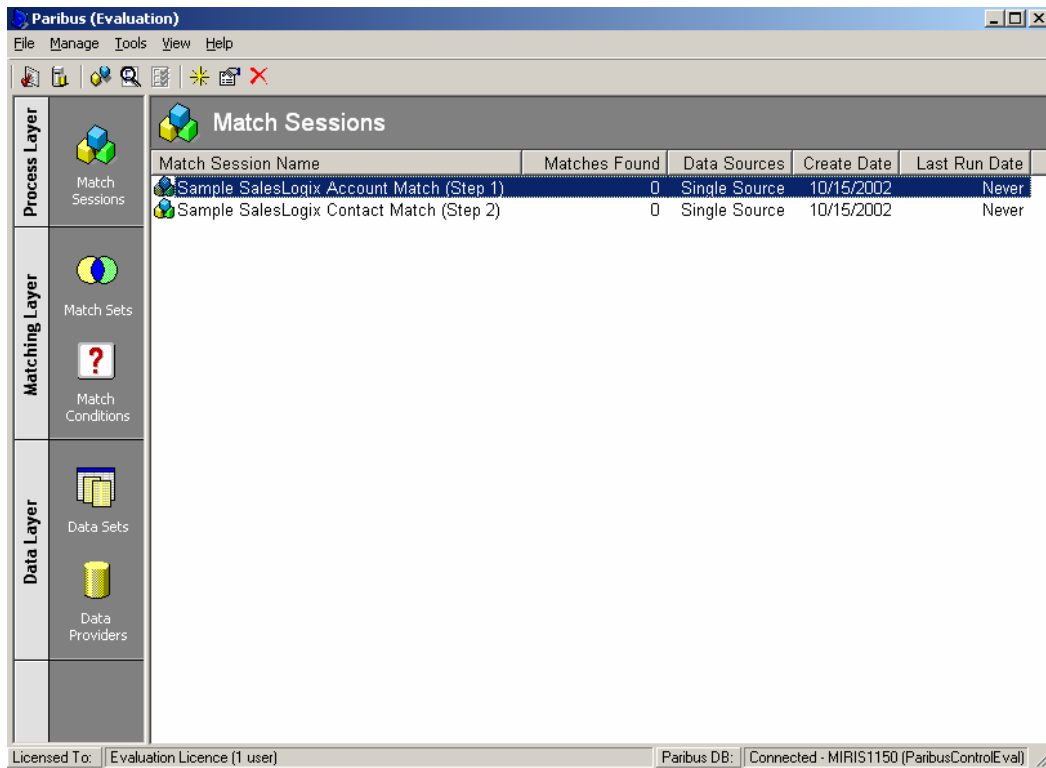


Figure 21 - Main Paribus Application Window

The main Paribus Application window is comprised of three main areas:






The application menu/toolbar at the top of the window

The Paribus Navigation Bar on the left of the main window. Clicking on each of the icons in this navigation bar displays a list of the associated items in the definition list area.

The Paribus definition list area comprises the majority of the window. Here, a context-sensitive list of items is displayed. Double-clicking on an entry loads the item's definition for edit. Alternatively, a right mouse button (RMB) click on an item brings up a menu of choices (e.g., Edit, Delete, Create New, Run Session, Review Session, etc.).

Paribus Definitions Overview

This section provides a brief overview to the Paribus Definitions that are used within the Paribus application to support the match process. For more detailed information on Paribus Definitions, see Paribus online help.

Process Layer	 <h3>Match Sessions</h3> <p>A Match Session is the highest-level object in Paribus and defines the rules that will be applied in a match process. It also contains the match results for that match process and allows those results to be viewed, reviewed, and exported/processed via the various tools and plug-ins.</p>
Matching Layer	 <h3>Match Sets</h3> <p>A Match Set is a template defining the initial two items of data (Data Sets) that will be compared within the match process.</p> <p>A Match Set also defines related Match Conditions that can be optionally applied to the Match Set when used within a Match Session.</p> <p>When used within a Match Session, the definitions of the Match Set form the default (template) settings, however these can be overridden within the Match Session.</p>  <h3>Match Conditions</h3> <p>A Match Condition is a template defining additional match criteria that can be optionally applied to the matches established from a Match Set.</p> <p>Once a Match Set has established a collection of initial matches (e.g. matching Company Names), a Match Condition can then be applied to those matches (e.g. on Postal code).</p> <p>One or more Match Conditions can be applied during the match process, and only those results meeting the criteria of <i>all</i> or any <i>one</i> of the conditions (AND / OR) will remain in the match results.</p> <p>Match Conditions are linked to Match Sets based upon their related data and are available for selection in the match process via the Match Session.</p>
Data Layer	 <h3>Data Sets</h3> <p>A Data Set defines how the match data and supporting information are to be retrieved from a specified data source (accessed by a Data Provider) during a match process. It also allows the definition of filters that can be optionally applied during a match process to limit the type or extent of data being retrieved.</p> <p>Data Sets are referenced by both Match Sets and Match Conditions and a given Data Set can be used in any number of Match Sets and Match Conditions.</p>  <h3>Data Providers</h3> <p>A Data Provider is the lowest-level object in Paribus and defines a connection to a source of data to be used in a match process.</p> <p>Data Providers are used by Data Sets to access the underlying data. A given Data Provider can be used in any number of Data Sets.</p>

Note: The definitions needed to provide a basic data evaluation of SalesLogix for this purpose are included in the set imported earlier in these instructions. For expediency, we'll jump right to running a session using the definitions included.

Review Match Session Settings

To quickly review the **Sample SalesLogix Account Match (Step 1)** Match Session, double-click on its title.

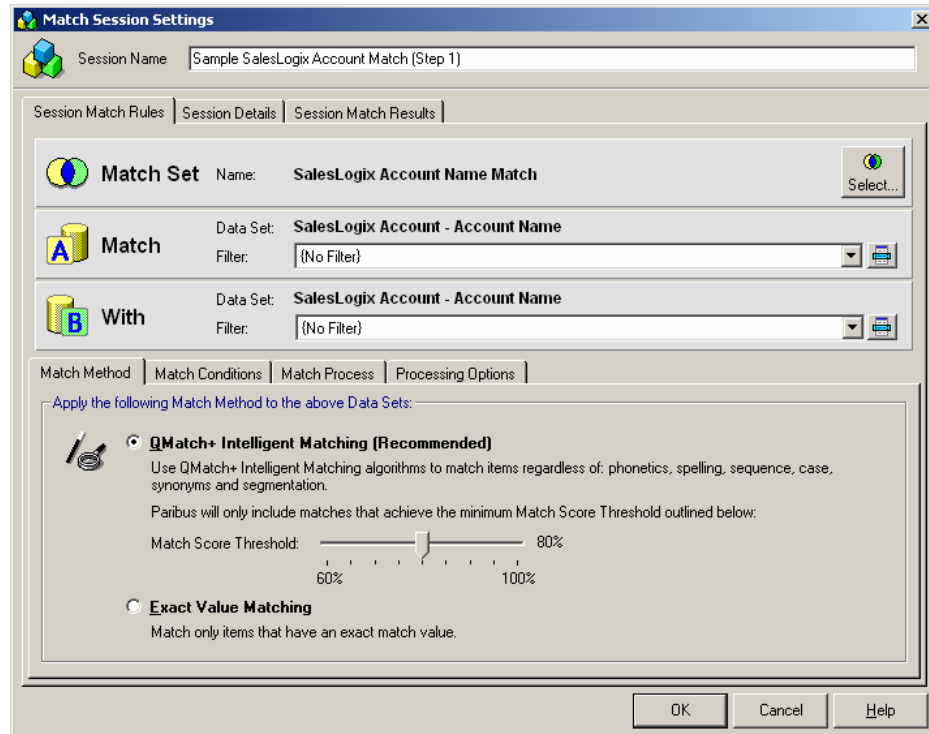


Figure 22 – Match Session Settings window

You'll see that this Match Session is based upon a Data Set called **SalesLogix Account – Account Name**. This Data Set is defined to provide a comparison of Account Names within a single SalesLogix database. There are no filters applied, so it will compare the entire database against itself. This would be a typical use of Paribus to evaluate an existing database for duplicates.

The Match Method is set to use QMatch+ Intelligent Matching and to apply an 80% Match Score Threshold when comparing Account Names. This allows for a wide variety of name variations based upon the QMatch+ technology outlined earlier in this document.

- 1) Click on the **Match Conditions** tab to review the additional conditions that will be applied when you run this Session.

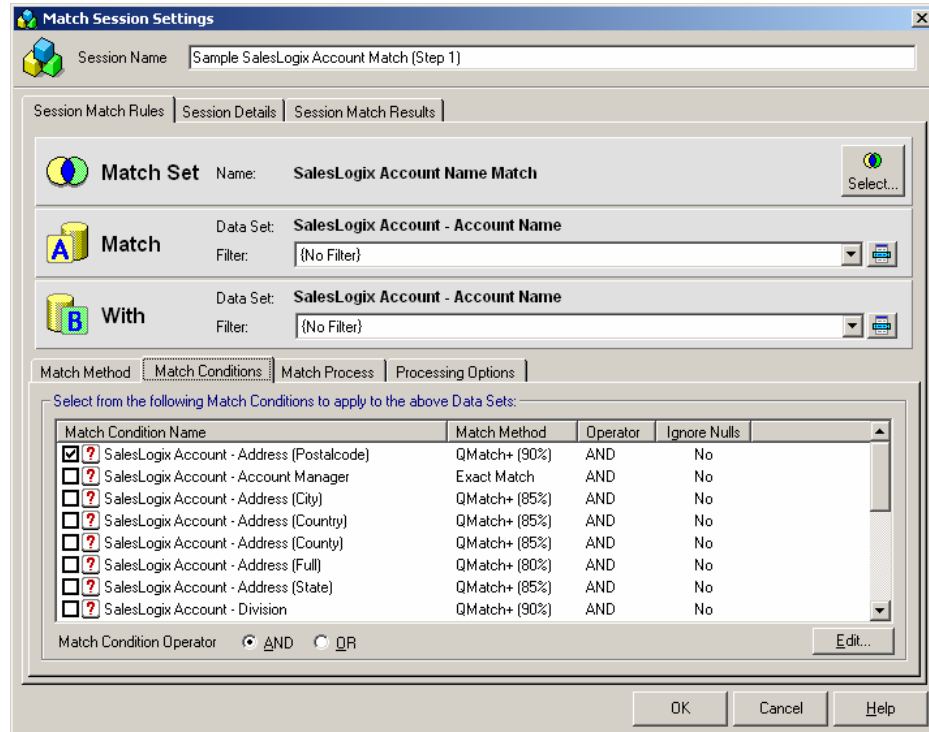


Figure 23 – Match Session Settings window

There are a wide variety of pre-created Match Conditions available to be used in conjunction with the primary Match Criteria outlined in the **SalesLogix Account – Account Name** Data Set. These conditions allow you to further refine your match so that Paribus can present the best group of potential matches for your review.

For this purpose, we've checked off the Postalcode condition and set it to a 90% match threshold, so that we'll only be presented with potential Account Name matches that are close in geographic proximity. You can make adjustments to this as necessary, but for quick evaluation purposes, we suggest leaving this alone for now.

2) Click **OK** to close the Match Session Settings window.

Running the Paribus Application to Evaluate Data

- 1) To run the **Sample SalesLogix Account Match (Step 1)** Match Session, right-click the title and choose **Run Session...** from the popup menu.

This action will display the **Identify Matches** dialog detailing the match process outlined in your Match Session.

- 2) Clicking the **Run** button will start the match process.
- 3) To run the session immediately, click OK on the Run Match Session dialog.

During the process, the dialog will provide information on the progress and number of matches found.

Once the match process is complete, Paribus will display a Session Summary Report providing information about the match process, match operations performed, and matches found.

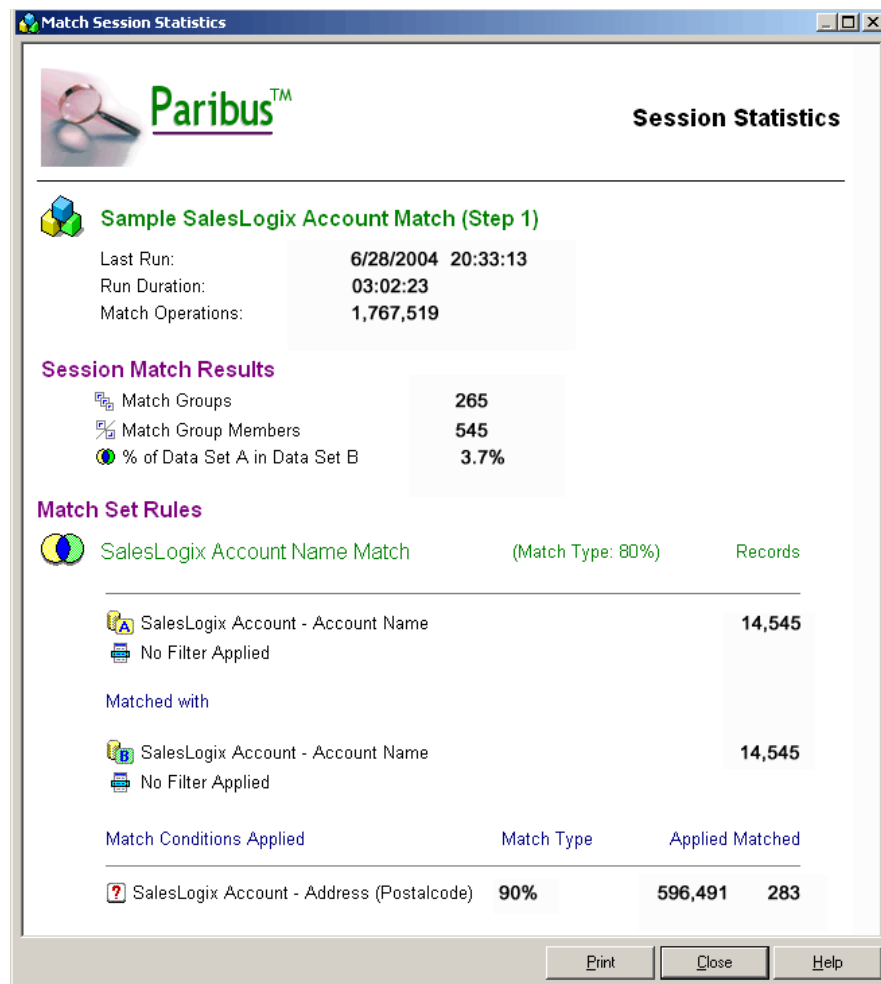


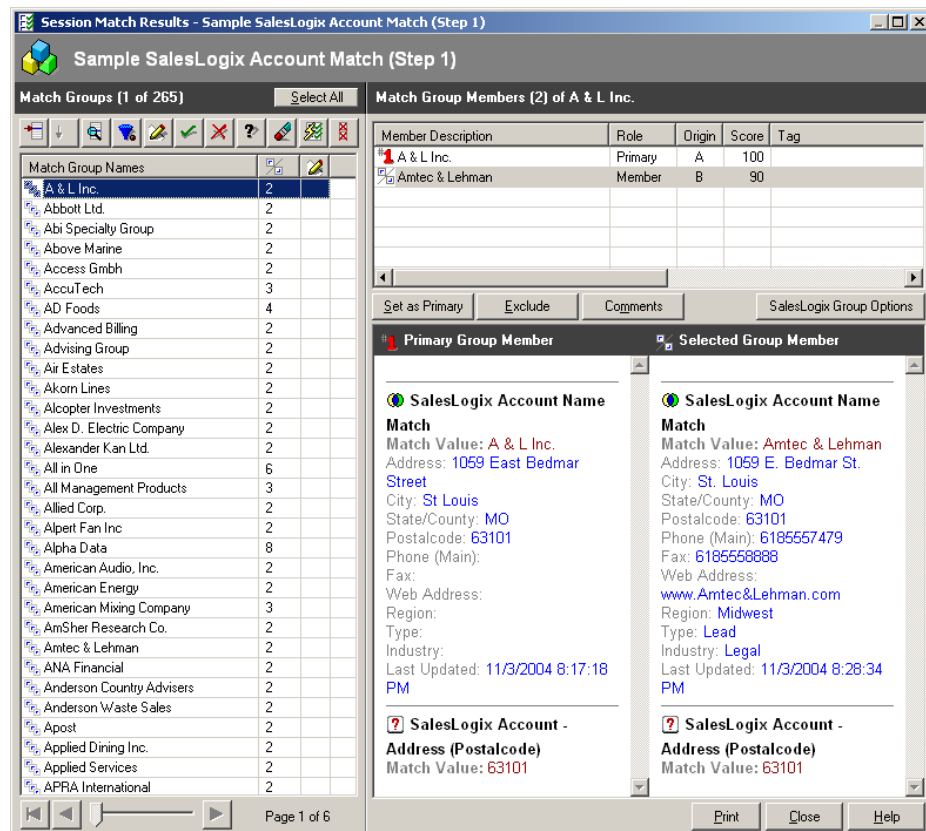
Figure 24 – Match Session Statistics Report

- 4) We suggest printing this report on paper or printing to a PDF file for reference. Close this report and click **Close** to close the **Identify Matches** dialog.

Reviewing Your Paribus Match Results

- 5) If your match process has established a collection of matches, the next step would be to review and approve the match results. This is achieved using the Paribus Session Match Review window.
- 6) To review Session Match results, select the Match Session from the Match Session list, and right mouse click the Match Session you wish to review and select **Review Session...** from the popup menu.

This action will display the **Session Match Results** window.







The Figure 25 –Session Match Results

- 7) The main aim of the **Session Match Results** window is to provide the ability to review the match results found and, importantly, set the status of each Match Group and Group Member accordingly.

Important Note: Only Match Groups and Group Members that have been reviewed (status marked as **Reviewed** as outlined below) can be processed by the various tools and Paribus plug-in components.




Match Groups

By default, each Match Group has a group status of “Not Reviewed”. Using the **Session Match Results** window, a Match Group’s status can be set to one of the following:

	Not Reviewed (Default)	Default Group Status before reviewed.
	Reviewed	Group has been reviewed and approved. (will be processed by tools/plugin-ins).
	Queried	Group has been marked as queried (will not be processed by tools/plugin-ins).
	Void	Group has been marked as void (will not be processed by tools/plugin-ins).

Match Group Members

By default, each Group Member has a member status of either “Member” or “Primary”. Using the **Session Match Results** window, a Group Member’s status can be set to one of the following:

	Group Member (Default)	Group Member is a member of the group (in a duplicate cleansing exercise, this member would be denoted as a duplicate). Member will be processed by tools/plugin-ins.
	Primary Group Member	Group Member is the Primary Group Member (in a duplicate cleansing exercise, this member would be denoted as the master record). Member will be processed by tools/plugin-ins.
	Excluded Member	Group Member has been excluded from the group. Member will not be processed by tools/plugin-ins.

Note: The Group Member statuses listed here are for Single Data Source matches only.

For more information on how to use the Session Match Results window, click the **Help** button on the **Session Match Results** window.

Processing Your Paribus Match Results

The evaluation license with which you’re working is limited insofar as it does not allow for the export or processing of matches found by Paribus, however it can be used to evaluate the level of record duplication that exists within your data to help determine if Paribus would be of assistance in cleansing your data.

With the complete licensing for Paribus Enterprise and the Paribus for SalesLogix plug-in, your final steps would include reviewing the results of your Match Session, setting each Match Group’s status accordingly, and then processing them using the Paribus for SalesLogix plug-in component.

For more information on the functionality of the Paribus for SalesLogix plug-in component, see the online help and the Paribus for SalesLogix – User Guide.

Notes for Evaluating Multiple Clients' Data

If you are a SalesLogix Business Partner or similar Service Provider and would like to evaluate SalesLogix data from multiple clients, it is highly recommended that you utilize a different Paribus Control Database for each client. This will ensure that you do not inadvertently overwrite any Match Session Results or inadvertently provide incorrect results.

Once you have created your first Paribus Control Database for use evaluating a client's data, return to page 14 to create an additional Paribus Control Database with a different name. We suggest you include the Client name in the db name for clarity; e.g., ParibusControlMyClient.

To provide descriptive information to your client to outline the status of duplication within their data, we suggest delivering a copy of the Match Session Statistics report (page 30) and some screen-shots of selected detail from the Session Match Results review screen (page 31).

Achieving Effective and Efficient Matching

A number of steps can be taken to achieve effective matching using Paribus. These should be treated as guides, and not as strict rules.

1. Use Multiple Match Process Passes for Best Results

Depending on the structure of the data on which you wish to match, it may be strongly advisable to run more than one match process on the data to achieve the most effective results.

For example, if performing a Contact record de-duplication process, duplicate Contacts may relate to the same Company record, or to duplicate Company records. It is, therefore, advisable to run a de-duplication process on the Company records first, with subsequent consolidation of the Company records (i.e., re-assignment of all records related to the duplicate Companies to a single 'master' company followed by deletion of the duplicate Company records). Then, run a Contact de-duplication process to identify duplicate Contacts within the remaining Company records.

Typical Scenarios

Company Name De-duplication – only a single pass is necessary. Perform a match process on the Company records alone, with suitable Match Conditions applied (see Point 2, below).

Company Contact De-duplication – two passes are advised. The first pass identifies duplicate Companies (as in Company Name Match, above), followed by consolidation of the duplicate Companies. The second pass identifies duplicate Contacts, with a Match Condition based on each contact's Company ID applied (see Point 2, below).

Private Contact De-duplication (no Company relationship) – only a single pass is necessary. Perform a match process on the Contact records alone, with suitable Match Conditions applied (see Point 2, below).

2. Use Match Conditions

Applying Match Conditions to a Match Session can increase the accuracy of match results considerably. Depending on the match threshold used against the Match Set, relying on the matches from the Match Set alone can yield some over-optimistic matches. Applying one or more Match Conditions can significantly reduce this problem.

Note: if too many Match Conditions are applied (especially if the Match Condition Operator for the Session is set to 'AND') the match process may yield very few or no results. Likewise, the underlying data supporting the Match Condition(s) should also be well populated to ensure additional matches occur successfully.

As a rule, the Match Set threshold should be set to about 80%, while match thresholds for Match Condition(s) should be a little higher at about 90% (dependent upon the data).

Typical Scenarios

Company Name Match – if a Match Set is based on Company Names, applying Match Conditions based on Postal Code, Town/City and/or Phone Number may provide more accurate results.

Company Contact Match – if a Match Set is based on Company Contact Names, applying a Match Condition based on the Company ID (assuming the Company data has been thoroughly de-duplicated first - see Point 1, above), will ensure only duplicate Contacts at the same Company are matched.

Private Contact Match (no Company relationship) – if a Match Set is based on Private Contact Names, applying Match Conditions based on Postal Code, Town/City and/or Phone Number may provide more accurate results.

3. If no Match Conditions are used, increase Match Set Threshold

If no Match Conditions are available (or none are applied to the Match Session) increase the Match threshold of the Match Set to 90%+. This will effectively reduce the number of over-optimistic matches.

4. Use of 'Extended Matching'

Extended Matching (under a Session's Match process options) uses more rigorous match rules and can often result in matches being found that would not otherwise occur. This, however, is at the expense of (significantly) increased processing time.

5. Use 'Log Unmatched Records' with care

'Log Unmatched Records' (under a Session's Process Options) is a useful option that stores within a Session's match results any records that did not match any other in the underlying data. However, storing the extra records incurs additional overhead that can be avoided if the logging of unmatched records is not required.

6. Select Data Set fields and joins with care

Including appropriate information columns in a Data Set's definition can be very beneficial when reviewing the match results. However, more information columns (and associated database table joins) can slow the match process. Therefore, only include those columns that are useful and likely to be well-populated with data.

7. Index the underlying data tables

Look-ups on the underlying data will be quicker if the relevant columns in the database table(s) have appropriate indexes in place. Typically, the Primary Key, Foreign Key and any join columns defined in the Data Set should be indexed. Likewise, if any filters are being used, the look-up columns of those filters should also be indexed.

8. Set Paribus Match Dictionary rules carefully

Each Data Set has one or more associated Paribus Match Dictionaries (depending on the use of filters). A Match Dictionary contains intelligent references to the data being matched upon, and is used by Paribus to achieve intelligent matching using QGate's QMatch+ matching component.

A Match Dictionary is always built the first time a match process is run against a Data Set. By default, the Match Dictionary is retained for a number of days (set by the options on the Data Set Options tab) to prevent the overhead of rebuilding the Match Dictionary repeatedly with subsequent Session runs.

If the underlying data changes, however, it is important to force a rebuild of the Match Dictionary by using the 'Delete Dictionary' function under the Data Set Options tab. If the underlying data is constantly changing, it may be worth enabling the 'Generate Match Dictionary every time this Data Set is used' option.

Paribus – Troubleshooting

This section provides some assistance in identifying common issues and providing potential resolutions.

Unable to Connect to my Paribus Control Database

If you are unable to connect to your Paribus Control Database, this may be due to one of the following:

The SQL Server service on which the Control Database is located is not running. Start the SQL Server service.

The Control Database does not exist on the selected SQL Server. Create a Control Database on the designated server, or connect to the server that is hosting the required database.

Paribus requires Microsoft Data Access Components 2.6 to run correctly. Make sure this is installed on the client machine.

I don't get any Matches when I run my Match Session

If you obtain no match results on running a Match Session, one or more of the following may be the cause:

Your Session match criteria are too stringent. Try setting the Match Threshold of the Session to a lower threshold value or disabling one or more Match Conditions in the Session.

The information contained within the Match Dictionary is no longer valid, so nothing matches against it. A solution to this issue is to edit the Data Set used by the Match Set, and delete the Match Dictionary (Options tab).

Of course, this may be due to there being no matches or duplicates in the underlying data. If filters have been applied, are the criteria too narrow?

Paribus – Technical Support

General

For general technical support on installing and configuring your Paribus software, firstly see the trouble shooting section on page 37, or contact your Paribus software supplier.

Alternatively, contact Miris or QGate Technical Support.

Fault Reporting

If you wish to report a fault or an issue with Paribus, please contact your Paribus software supplier or contact QGate Technical Support.

Alternately you can register faults at the QGate website at www.QGate.co.uk