

RELTIO

Automated Unmerge

Community webinar

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Feature benefits

Problem: As the records go through new updates, the previously merged records should not stay merged. This creates invalid merge situations that data stewards have to manually address and resolve.

Persona: Data stewards and technical leaders

Alternative: Identify records that require unmerging and then unmerge these records manually from the UI or programmatically using APIs.

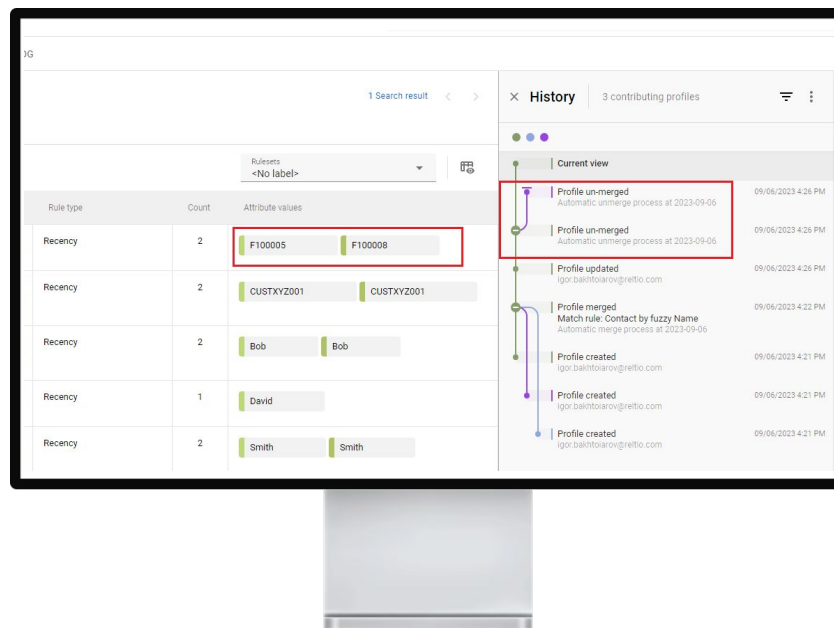
Solution: The automatic “un-merge” feature monitors and detects any entities that qualifies for the unmerge and automatically un-merges the underlying crosswalks when they no longer meet the matching criteria

Expected Benefit: Reduce or completely eliminate the need to manually unmerge records if the match attributes are changed.

Value to the business: Automatic unmerge will ensure that only the relevant match pairs remained merged without any manual intervention.

Increase data team efficiency and agility with automated unmerging

- **Boost data steward productivity** by eliminating the need for extensive ongoing manual unmerge tasks and custom IT projects
- **Gain the flexibility to revise match rules** and seamlessly onboard data sources without requiring massive manual rework
- **Improve data quality and matching accuracy** by reducing false positive matches in core data
- **Scale unmerge process efficiently** even as data volumes grow with real-time operations and batch mode for bulk unmerges across records



Augment data team productivity by
automatically and accurately
matching/merging

Reltio platform's new automatic unmerge feature will improve data steward's productivity by eliminating the need to manually unmerge and also improve accuracy by automatically finding and unmerging previously merged records that no longer meet their matching criteria.

Automatic unmerge will also help reduce or eliminate the time-consuming and error-prone manual unmerge tasks.



What does it look like?

Example scenario

- 3 profiles having the same Name, Email and Identifier were loaded into the Reltio
- These profiles were automatically merged by the system based on the match rule

The screenshot displays the Reltio interface for a user profile named "Bob David Smith, Sr". The interface includes a top navigation bar with tabs for PROFILE, GRAPH, POTENTIAL MATCHES, SOURCES, and ACTIVITY LOG. The SOURCES tab is active, showing a table of data sources and their attributes.

Profile Information:

- Name: Bob David Smith, Sr
- Address: 1001 NW 52nd Ter Gainesville FL 32605
- Entity ID: 0002qHh

Sources Table:

Attributes & OV	+ ATTRIBUTE	Winner source systems	Rule type	Count	Attribute values
Source Profile ID F100008		LinkedIn	Recency	3	F100008, F100001, F100005
Legacy Member ID CUSTXYZ001		LinkedIn	Recency	3	CUSTXYZ001, CUSTXYZ001, CUSTXYZ001
First Name Bob		LinkedIn	Recency	3	Bob, Bob, Robby
Middle Name David		LinkedIn	Recency	2	David, M
Last Name Smith		LinkedIn	Recency	3	Smith, Smith, Smith
Suffix Name Sr		LinkedIn	Recency	2	Sr, Jr
Email xyz@abc.com		LinkedIn	Recency	1	xyz@abc.com
Status Active		LinkedIn	Recency	2	Active, Active
Identifiers NPI 1234, NPI 789		LinkedIn	Aggregation	2	NPI 1234, NPI 789

History Panel:

- Profile merged: Match rule: Contact by fuzzy Name. Automatic merge process at 2023-09-06.
- Profile created: igor.bakhtoiarov@relio.com
- Profile created: igor.bakhtoiarov@relio.com
- Profile created: igor.bakhtoiarov@relio.com

What does it look like?

Example scenario

- One of the records first name was changed
- The updated profile was automatically unmerged from the group of 3 profiles

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Search

PROFILE GRAPH POTENTIAL MATCHES **SOURCES** ACTIVITY LOG

Bob David Smith, Sr
5111 Winster Dr Winston Salem NC 27106
Contact Entity ID: 0000ZZA

1 Search result

Sources

Rulesets <No label>

Attributes & OV	+ ATTRIBUTE	Winner source systems	Rule type	Count	Attribute values
Source Profile ID F100005		LinkedIn	Recency	2	F100005 F100008
Legacy Member ID CUSTXYZ001		LinkedIn	Recency	2	CUSTXYZ001 CUSTXYZ001
First Name Bob		LinkedIn	Recency	2	Bob Bob
Middle Name David		LinkedIn	Recency	1	David
Last Name Smith		LinkedIn	Recency	2	Smith Smith
Suffix Name Sr		LinkedIn	Recency	1	Sr
Status Active		LinkedIn	Recency	1	Active
Address 5111 Winster Dr Winston Salem NC 27106		Reltio	Aggregation	1	5111 Winster Dr Winston Salem NC 27106

History 3 contributing profiles

Current view

- Profile un-merged
Automatic unmerge process at 2023-09-06 09/06/2023 4:26 PM
- Profile un-merged
Automatic unmerge process at 2023-09-06 09/06/2023 4:26 PM
- Profile updated
igor.bakhtoiarov@relio.com 09/06/2023 4:26 PM
- Profile merged
Match rule: Contact by fuzzy Name
Automatic merge process at 2023-09-06 09/06/2023 4:22 PM
- Profile created
igor.bakhtoiarov@relio.com 09/06/2023 4:21 PM
- Profile created
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Search

PROFILE GRAPH POTENTIAL MATCHES SOURCES ACTIVITY LOG

Mark2 M Smith, Jr
1001 NW 52nd Ter Gainesville FL 32605
Contact Entity ID: 0000R2e

2 Search results

History 2 contributing profiles

Current view

Attributes & OV	+ ATTRIBUTE	Winner source systems	Rule type	Count	Attribute values
Source Profile ID					
F100001		LinkedIn	Recency	1	F100001
Legacy Member ID					
CUSTXYZ001		LinkedIn	Recency	1	CUSTXYZ001
First Name					
Mark2		LinkedIn	Recency	1	Mark2
Middle Name					
M		LinkedIn	Recency	1	M
Last Name					
Smith		LinkedIn	Recency	1	Smith
Suffix Name					
Jr		LinkedIn	Recency	1	Jr
Email					
xyz@abc.com		LinkedIn	Recency	1	xyz@abc.com
Status					
Active		LinkedIn	Recency	1	Active
Identifiers					
NPI 789		LinkedIn	Aggregation	2	NPI 789
NPI 1234					NPI 1234
Address					
1001 NW 52nd Ter Gainesville FL 32605		Reltio	Aggregation	1	1001 NW 52nd Ter Gainesville FL 32605

Profile un-merged
Automatic unmerge process at 2023-09-06

Profile un-merged
Automatic unmerge process at 2023-09-06

Profile un-merged
Automatic unmerge process at 2023-09-06

Profile un-merged
Automatic unmerge process at 2023-09-06

Profile updated
igor.bakhtolarov@reltio.com

Profile merged
Match rule: Contact by fuzzy Name
Automatic merge process at 2023-09-06

Profile created
igor.bakhtolarov@reltio.com

Profile created
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Technical Overview

RELTIO



Configuration & Usage

How is it configured / modified ?

- The automatic unmerge feature can be configured at the entity level. This means you can choose to enable this feature for one entity type while disabling it for others.
- By default this feature is **NOT** enabled

Which Implementation Roles would configure this?

- Users with permission to modify L3 will be able to make this change

About how frequently would configuration be done?

- This will be configured just once per entity type and the enabled or disabled by changing value between true and false

What configurations are intended to be altered by configurator?

- Configuration is needed to enable and define the supported properties of the feature

What's new in 2024.1

2023.3	2024.1
<ul style="list-style-type: none">Does not consider relevance_based match rules. So even if the match pair generate a score that qualify it for the automatic merge will be unmerged if this pair does not meet the matching criteria of at least one automatic match rule type.	<ul style="list-style-type: none">Relevance match rules are considered in the unmerge evaluation
<ul style="list-style-type: none">You cannot retain merges initiated by data stewards, as even manual re-merging will result in automatic unmerging if the records don't meet the matching criteria.	<ul style="list-style-type: none">By default, manually merged records are not unmerged. This setting can be overridden
<ul style="list-style-type: none">Currently, all automatic rules are considered while determining if the merged records should continue to stay merged or should be unmerged. We can consider list of rules that will be used to determine if records should be unmerged.	<ul style="list-style-type: none">User can provide list of match rules to consider in the unmerge evaluation in addition to the automatic match rules that are considered by default
<ul style="list-style-type: none">"batchUnmergeEntities" job to evaluate and unmerge all entities	<ul style="list-style-type: none">"batch UnmergeEntities" job to evaluate and unmerge all entitiesSet reporting parameter to true to get the count of entities eligible for unmerging without unmerging the records

Configuration example

```
{
  "uri": "configuration/entityTypes/Individual",
  "label": "Individual",
  "description": "Basic contact & personal info, along with all available details",
  "typeColor": "#E5A50A",
  "typeIcon": "images/entity_icons/individual.svg",
  "typeImage": "images/defaultImage/no-photo.png",
  "typeGraphIcon": "images/graphIcon/graphIcon_gender_neutral.png",
  "unmerge": {
    "enabled": true,
    "retainMergeConditions": {
      "matchGroups": [
        {
          "uri": "configuration/entityTypes/Individual/matchGroups/Rule1"
        }
      ],
      "sources": [
        "configuration/sources/Salesforce",
        "configuration/sources/ReltioCleanser"
      ]
    }
  },
  "retainManualMerges": true
},
```

Demo

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Contact Entity ID: 0002qHh

1 Search result

History 3 contributing profiles

Current view

Profile merged
Match rule: Contact by fuzzy Name
Automatic merge process at 2023-09-06

Profile created
igor.bakhtoiarov@relio.com 09/06/2023 4:16 PM

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First Name Bob		LinkedIn LinkedIn	Recency	3	Bob Bob Robby
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Last Name Smith		LinkedIn LinkedIn LinkedIn	Recency	3	Smith Smith Smith
Suffix Name Sr		LinkedIn	Recency	2	Sr Jr
Email xyz@abc.com		LinkedIn	Recency	1	xyz@abc.com
Status Active		LinkedIn LinkedIn	Recency	2	Active Active
Identifiers NPI 1234 NPI 789		LinkedIn	Aggregation	2	NPI 1234 NPI 789

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PROFILE GRAPH POTENTIAL MATCHES SOURCES ACTIVITY LOG

2 Search results

Mark2 M Smith, Jr
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Contact Entity ID: 0000R2e

Sources

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Legacy Member ID CUSTXYZ001	in LinkedIn	Recency	1	CUSTXYZ001	
First Name Mark2	in LinkedIn	Recency	1	Mark2	
Middle Name M	in LinkedIn	Recency	1	M	
Last Name Smith	in LinkedIn	Recency	1	Smith	
Suffix Name Jr	in LinkedIn	Recency	1	Jr	
Email xyz@abc.com	in LinkedIn	Recency	1	xyz@abc.com	
Status Active	in LinkedIn	Recency	1	Active	
Identifiers NPI 789 NPI 1234	in LinkedIn	Aggregation	2	NPI 789 NPI 1234	
Address 1001 NW 52nd Ter Gainesville FL 32605	R Reltio	Aggregation	1	1001 NW 52nd Ter Gainesville FL 32605	

Rulesets
<No label>

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Gotchas

Possible problem scenarios or risks

Include prevention methods

- Recommended to enable this feature and test thoroughly for all unmerge scenarios in lower environment before enabling in production
- If any unexpected unmerges occurred in the tenant then disable this feature immediately and report the issue to the support team.



Future Plans

Today, users cannot retain merges resulted due to “merge-on-the-fly” by crosswalk event. We are planning to provide this control in future releases.

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Thank You

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