pitney bowes

Spectrum™ Technology Platform
Version 2018.2.S12
Release Notes

This document contains information about Spectrum™ Technology Platform 2018.2 S12. You have access only to the modules you have licensed. To evaluate any other modules, contact your Pitney Bowes account executive for a trial license key.

Who should apply this update?	This product update is intended for the users of **Spectrum Screener**.
Is this update required?	This product update is mandatory.

Contents:

What's New

Added a new user-interface for interactively processing batches of data.

Adding a new job for interactive batch screening

(CDQE-72039) Add a new job for batch screening.

You can now add a new job for **Batch Screening**.

Follow these steps to add a new job:

1. Log in to **Screener** and click **Screen** from the top menu options.
2. Click the **Batch** tab. This tab displays a list of batch jobs added by you along with the *latest run* of a job such as **Job Name**, **Description**, **Job Status**, **Duration**, **Records**, **Matched** records, **Non-Matched** records, and **% Matched**.

    This list is pre-sorted on the basis of *latest job creation* or *edit date*.

    You also have the capability of *adding*, *editing*, *deleting*, *running*, and *re-run* any job with the help of respective icons.

    > **Note:** This list will be blank if you are creating a job for the first time.

3. Click the [+] icon to add a new job. The **New Job** page opens up.
4. Enter your unique job name in the **Job Name** field.
5. If required, enter a description for your job in the **Description** field.
6. Click the **Browse** button, navigate to your **Party data file** and click **OK**.

Note: The party data schema should be in the following format; the *in_PartyID* field must be *unique* and *not blank*.

Party Data Schema

---

in_PartyID|in_Portfolio|in_SourceSystem|in_PartyName|in_PartyFirmName|

in_PartyFirstName|in_PartyMiddleName|in_PartyLastName|in_PartyMaturitySuffix|

in_PartyGender|in_PartyIdentifier|in_PartyIdentifierCountry|in_PartyIdentifierFormat|

in_PartyBirthDate|in_PartyBirthCountry|in_PartyPrimaryCitizenshipCountry|in_PartyResidenceCountry|

in_PartyPhoneNumber|in_PartyPhoneNumberCountryCode|in_PartyPhoneNumberExtension|

in_PartyPhoneUsageType|in_PartyType|in_PartyEmailID|in_PartyAddressLine1|in_PartyAddressLine2|

in_PartyAddressLine3|in_PartyAddressLine4|in_PartyAddressUsageType|in_PartyCity|

in_PartyPostalCode|in_PartyRegion|in_PartyState|in_PartyCountry|in_PartyGUID

---

7. Select the **Party Group** to define lists against which you want to screen from the list available in the drop-down.
8. Select the **Match Rule** for cleansed and uncleansed list from the drop-down.
9. Set the **Match Threshold**.
10. Select the **Match Key** from the list displayed. The available options are **Soundex**, **Metaphone**, **Phonix**, or **no match key**.

    Select the check-box if you wish to **Use substring as match key for company**; this check-box is disabled for **no match key**. If you select **Soundex**, **Metaphone**, or **Phonix**, the value of **Candidate Count** will be set to `300` by default; and if you select **No Match Key**, by default it will be set to `1000`. You have the flexibility of overriding these values.

    Note: **No Match Key** option should not be used for a large party data.
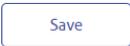
11. Click the [Save] button to save your new job or the [Save & Run] button to run the newly created job.

Viewing details of batch screen jobs

(CDQE-72042) Ability to display batch screen job run details

You can view the job details and run history of previously run batch jobs through the **Batch Screen** homepage. Click the desired job name from the list of batch jobs, the **Job Details** page is displayed.

Job Details

This page displays various details such as the **Job Name**, **Description**, **Last Run Status**, and the **Job Run History**.

The last run status and job run history specifies details such as **Match Rule Name**, **Match Threshold**, **Match Keys**, **Start Time**, **Job Status**, total number of **Records**, **Matched** records, **Non-Matched** records, and **% Matched**.

> **Note:** You can re-run any job with the same configuration and party data by clicking the
>
> [C] button. You must not try to multiple job re-runs when it is already in a running state.

Edit and Run

If you wish to run the same job with a different configuration or party data, click [Edit & Run] placed on the top-right of the screen.

A **New Run** pop-up is displayed showing configurations of the selected job.

You can choose to replace the **Party data file** by clicking on [Change] and go to the path where your new party data file resides. **Party Group** and **Match Rule for cleansed and uncleansed list** can be modified using the respective drop-downs. You also have the flexibility of modifying the **Match Threshold** and **Match Keys**.

After specifying the new configurations, click [Save & Run] to re-run the job.

> **Note:** Job configurations once edited by any user gets locked for all other users. This ensures that only one job can be edited at a time by a user.

Viewing Matched and Non-Matched Records

(CDQE-72078) Ability to display matched and non-matched records for a job run.

You can view matched and non-matched data records detected in a job which are displayed under the **Batch** Screen tab. Click on the *number* displayed under the **Matched** or **Non matched** column to view details.

Viewing Matched Data Details

This page displays matched party details such as **Party ID**, **First name**, **Last name**, **Name**, **City**, **State/Province**, **Country**, and **Match score**.

> **Note:** You can set the **Matching Threshold** through the sliding bar. The *configure threshold window* is also displayed here. For more information about how to set the configure threshold window, see **Configuring Match Rules and Threshold** on page 6. By setting this threshold,

you can choose to analyze non-matched records which fall outside the matching threshold. For example,**Matching Threshold** is set as `60`, and the configure threshold window is set to `10%`. Then, the non-matched records having match score less than `60` but more than `54` will also be displayed for analysis. The value of **configure threshold window** can vary between `0` and `20`.

You have the flexibility of filtering data on the basis of **Match Score**.

To view a detailed analysis of the matched party, click the **Party ID**, the **Alert** page displaying a detailed analysis of that party opens up. These details are displayed here:

- **Name** of the party along with the **Party ID**
- **Maximum list match score**- The cleansing match score is represented in percentage form.
- **Negative media match score**- The negative media match score is represented in percentage form. A score closer to *zero* is desirable and can be considered for *adding to whitelist* or giving a **Discount**.
- **Alert Status** and **Alert Status Reason**.
- **List Matches**- This section lists the number of matches for the party and displays these details:

  - **List name**
  - **Party name**
  - **Street**
  - **City**
  - **State/Province**
  - **Country**
  - **Match Score**: The matching score of the party with the list in percentage.

  Each list is further divided into *Cleansed* and *Uncleansed*. Click the ❯ icon to view a detailed analysis of cleansed and uncleansed matches. These details are displayed here:

  - **Attributes**- Components used for matching party and lists.
  - **List**
  - **Party**
  - **Match Score**

    Note: Click the **Match Rule** hyperlink to view the match rule and corresponding match scores.

- **Document Links**- This section lists all the articles in which a person's name is featured. You can also add an article to support a case for better analysis of the person or party using the *Add Document* icon.

To send a party for discount consideration, click **Discount** or to add a party to whitelist, click **Add to whitelist**. You can also send a party to case management for further review by clicking **Send to case management**.

Viewing Non Matched Data Details

This page displays non matched party details such as **Party ID**, **First name**, **Last name**, **Name**, **City**, **State/Province**, and **Country**.

> **Note:** The records lying below the *match threshold* but greater than the set *configure threshold window* are also displayed here.

Configuring Match Rules and Threshold

(CDQE-60234) Ability to add or modify match rules through the Match Rule Web.

You can modify existing match rules shipped with Spectrum™ Technology Platform **Screener** or add new match rules according to your requirement through **Match Rule Web**.

Follow these steps to configure match rules:

1. Log in to **Screener** and click **Configurations** from the top menu options.
2. Click the **Configuration** tab.

   > **Note:** You can also set the configure threshold window, enter the desired value of threshold window in the text box provided.

3. Click **Config Rule**, you will be navigated to the **Match Rules** page.

   Here you can *view*, *edit*, *copy*, *delete*, or *export* match rule using their respective icons. To create a new rule, click **⊕ Create Rule**.

   For more information about match rules, see **Building a Match Rule**.

Installation

To view the installation instructions for this product update, see **Configuring Screener Environment** section of the **Spectrum Screener Guide**, **Configuring the Screener Environment**.