TIBCO EBX® Match and Merge Add-on Release Notes

Version 6.2.0
June 2024

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New features

This release contains the following enhancements:

- The **Ensure group management** parameter was added to the **Manage group** workflow service. When this option is enabled, the workflow's **Accept** option only displays if the current group is resolved and has no suspect records.

- The **Back to the main view** button was re-labeled to **Review the merged group** to more closely describe the button's behavior.

- The Full text algorithm was updated to improve the consistency of matching operation results.

- When merging records or managing groups, a new vertical display option is available. This option displays the records in columns instead of rows. Administrators can set the default view with the new `ebx.addon.mame.manageGroup.record.display` property in the `ebx.properties` file. Use the values `vertically` or `horizontally` to define the view orientation. Please note that the vertical display option is not available when merging business objects.

- The UI for viewing pre-processing information was improved as follows:

  - Now, it only displays a field configured for matching one time, even if it is used in multiple decision tree nodes.

  - A value column was added to display the values being compared.

  - The fields are grouped by their tables.

- The UI for the decision tree result explanation was updated to improve readability.

- It is now possible to transfer configuration information for data models located inside a registered module via the EBX® staging feature.

- The foreign key alignment phase was added to the progress bar when running a matching operation.

- A warning is now displayed if an algorithm that is incompatible with the defined search strategy is selected in the decision tree. This warning no longer displays when evaluating matching results.

This release contains the following performance, technical and API enhancements:

- The pre-processing phase now takes into consideration the decision tree content to reduce the cluster size, which can lead to improved performance.

- During the pre-processing phase the balancing of matching field scores was improved so that each field equally affects the final similarity score.

- When simulating a match operation using the API, a procedure is no longer opened every time. This prevents a lock of the dataspace and any negative effects on `TableTrigger`.

- The separate procedures for matching, grouping, and merging were merged into a single procedure.

- Performance was improved when running a match operation with a selection of records.

- The REST API to accept or reject suspect records is now available.

- It is now possible to create a primary key generator to ensure that specific values from a composite primary key are survived into a golden record.

> **Attention**
>
> When upgrading from version 3.0.0, 3.1.0, or 3.1.1 you must update existing matching configurations. After updating configuration settings, you should re-execute matching to ensure that matching related metadata is up to date.

> **Note**
>
> As the add-on UI is under development, some images in the documentation might not exactly match those in the UI.

Changes in Functionality

This release contains no changes in functionality.

Upgrade notes

Take into account the following when upgrading from TIBCO EBX® Match and Merge Add-on version 3.0.0:

- When upgrading from version 3.0.0, 3.1.0, or 3.1.1 you must update existing matching configurations. After updating configuration settings, you should re-execute matching to ensure that matching related metadata is up to date.

- If upgrading from any version prior to 6.2.0, a performance improvement was made to better balance the weights of fields that participate in matching. The automatic balancing occurs during the pre-processing phase. This helps mitigate issues that might occur when fields include many values. As a result of this update, matching operation results might be impacted. To mitigate any negative impacts, you can test and adapt your existing weights to achieve the desired matching outcome. Alternatively, you can set the `ebx.clustering.balance` property to `false` in the `ebx.properties` file to restore the legacy behavior.

Changes to third-party libraries

This release contains no changes to third-party libraries.

Closed Issues

This release contains the following closed issues:

- **[MAME-8315]** The record's state and relationship are not rolled back when cancelling a matching operation after the exclusion phase.

- **[MAME-8826]** A warning message is not included in the validation report when the default search strategy is used with the fuzzy algorithm.

- **[MAME-8828]** A warning message is not included in the validation report when the phonetic search strategy is used with the distance algorithm.

- **[MAME-9658]** Locked fields are not fixed in place when scrolling in the **Merge** screen.

Known Issues

This release contains the following known issues:

- **[MAME-8084]** The **Evaluate matching** service returns inconsistent results for related matching fields that have the DateTime data type.

- **[MAME-8857]** It is not possible to accept or reject suspects in groups that contain a large number of records.

- Foreign key alignment of recursive foreign keys is not possible.

- **[MAME-7434]** Linked records are duplicated in the link table when one of the foreign keys is not part of the primary key.

- **[MAME-9049]** A manual merge operation cannot be performed on more than 400 records.

- When matching using the foreign key option, you can only specify a single hop foreign key. In other words, it cannot be a foreign key to a foreign key.

- The **Validation** service in the **Consolidated** view runs as expected when first executed, but slow on subsequent executions.

- In order to accurately track record lineage, table history must remain activated over time. If the table's activation status repeatedly changes, the lineage data will be inconsistent.

- Severe errors occur when multiple datasets based on the same model exist and a table from one of these datasets is activated in an add-on matching configuration. As a workaround, you can create another data model publication using the **Manage publications** service in the Data Model Assistant. After creating a dataset for the new publication, you can follow the normal procedures to configure a matching policy for tables in the new dataset.

- For foreign key alignment, the FKs that are multi-value fields cannot be aligned (either manually or automatically).