

IRIS User Guide: How to Check for Duplicate Records



SOCIAL INCLUSION & COMMUNITY ACTIVATION PROGRAMME 2018-2022

The Social Inclusion and Community Activation Programme (SICAP) 2018-2022 is funded by the Irish Government through the Department of Rural and Community Development and co-funded by the European Social Fund under the Programme for Employability, Inclusion and Learning (PEIL) 2014-2020



Ireland's European Structural and
Investment Funds Programmes
2014-2020

Co-funded by the Irish Government
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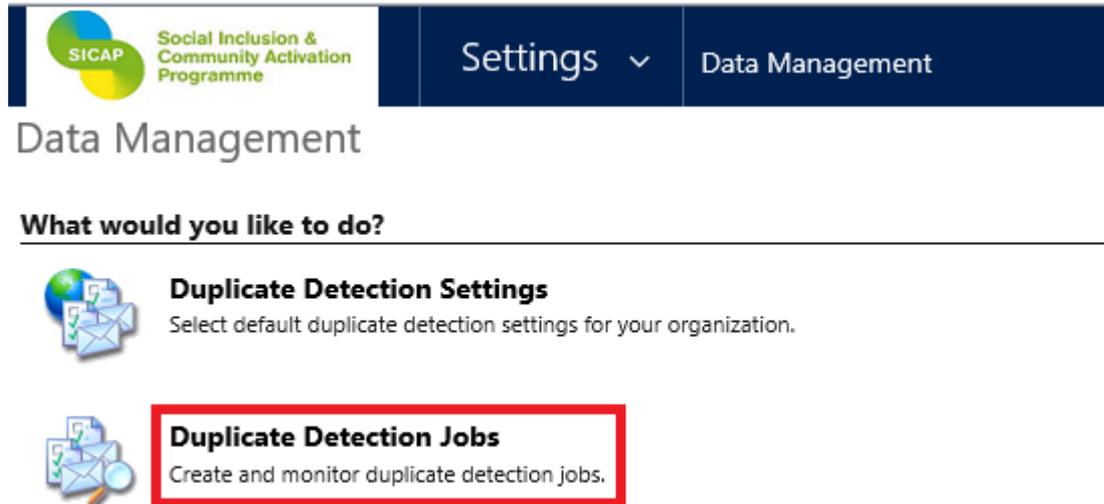
European Social Fund



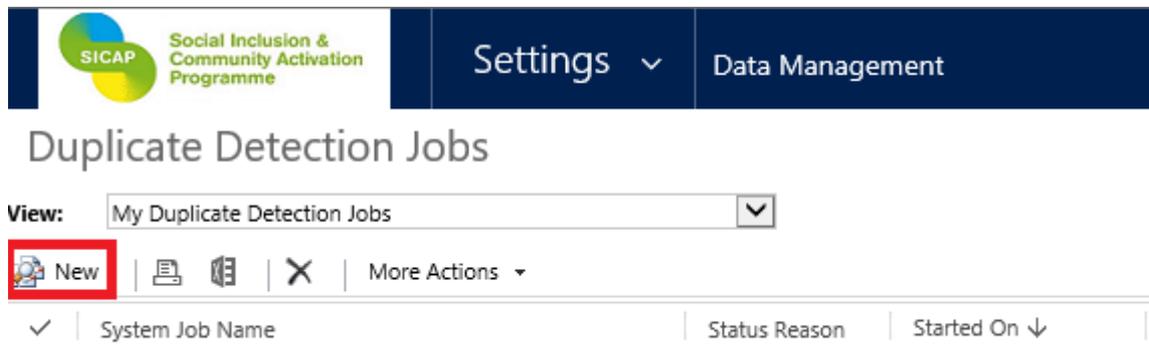
Rialtas na hÉireann
Government of Ireland

Duplication detection jobs should be run regularly to ensure that duplicates are identified and removed from the system (deactivated) in advance of submission of mid-year and end of year Fin & Mon reports. The individual detection report checks for similarities based on First name, Last Name, Age Band, Mobile Number, Address Line, Gender and Date of Birth.

1. In order to run a duplication report first navigate to Settings – Data Management- Duplicate Detection Jobs.



2. Click on the New icon to create a new report



3. The Duplicate Detection Wizard will open, click on Next

Welcome to the Duplicate Detection Wizard [Help](#)

This wizard helps you detect duplicates for all records in one entity. After you complete the wizard, a duplicate detection job will run in the background.

Use this wizard to:

- Specify the entity
- Specify a subset of records
- Specify scheduling and notification options

To continue, click Next.



4. Select the criteria that you wish to check for duplicates, in this example we will check individual records. You can also add any other specific criteria you wish. Click on next.

Select Records [Help](#)

Specify the entity to check. To limit the records checked, specify additional criteria.

Look for: **Individuals** Use Saved View: [new]

Clear | Group AND | Group OR

▼ Status Equals Active

Select

Preview Records



5. You can change the name of the report and also set it to run regularly if you wish by clicking on the Run this job after every... and setting the number of days. Make sure that the Email options check box is unticked. Click on Next.

Select Options [Help](#)

Specify the name of the duplicate detection job, and scheduling and notification options.

Name:
Duplicate Detection: __Individual Advanced Find View - 15/Jan/2020 10:07:28

Start time:
15/Jan/2020 10:09

Run this job after every
30 days

Email options:
 Send an email to me (NRadema@pobal.ie) when this job is finished
Also notify:

Back **Next** Cancel

6. Once all report criteria are selected click on submit.

Start Duplicate Detection Job [Help](#)

To create the duplicate detection job, click Submit.

Duplicate detection is processed in the background. You can continue to use Microsoft Dynamics 365. As each job is completed, you receive an email message if you selected that option.

To check the status of the background duplicate detection job, view the job in the Duplicate Detection area of the Workplace.

Back **Submit** Cancel

- The report will then begin and can be viewed once the status has changed to Succeeded. Click on the link to open the report.

SICAP Social Inclusion & Community Activation Programme

Settings Data Management

Duplicate Detection Jobs

View: My Duplicate Detection Jobs

New [Print] [Refresh] [Close] More Actions

System Job Name	Status Reason	Started On
Duplicate Detection: __Individual Advanced Find View - 1...	Succeeded	15/Jan/2020 10:15

- To view the report click on view duplicates:

https://together.pobal.ie/SICAP2018/tools/asyncoperation/edit.aspx?id=%7bD1E86BF7-7F37-EA11-A838-02BF0A0068C4%7d

System Job: Duplicate Detection: __Individual Advanced Find View - 15/Jan/2020 10:07:28

Information

System Job : Information

- General
- Details

Related

- Common
- View Duplicates**

General

Name: Duplicate Detection: __Individual Advanced Find Type: Bulk Duplicate Detection

Regarding: [Search] Created On: 15/Jan/2020 10:15

Job Owner*: Neil Radema [Search] Completed On: 15/Jan/2020 10:22

Retry Count: 0

- The report will open with two panes. The top pane will show all Potential duplicate records. Clicking on one of the individual records in the top pane will show the potential duplicate in the bottom pane. In the example below we have selected record 143515 in the top pane and the Potential duplicate of this, record 167580, is shown in the bottom pane. It is convenient to sort the top pane by first name as this will usually show the potential duplicate directly underneath, as you can see the second record in the top pane is the potential duplicate 167580.

Individual ID	Status	Modified On	Address Line 1	Age Band	Date of Birth	First Name	LDC	Last Name
143515	Active	20/Jun/2019 19:...	[Redacted]	[Redacted]	[Redacted]	[Redacted]	South Tipperary--	[Redacted]
167580	Active	20/Jun/2019 19:...	[Redacted]	[Redacted]	[Redacted]	[Redacted]	South Tipperary...	[Redacted]
144685	Active	20/Jun/2019 19:...	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Breifni Integrate...	[Redacted]
144686	Active	20/Jun/2019 19:...	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Breifni Integrate...	[Redacted]

1 - 12 (1 selected)

Potential duplicate records: Individuals(1)

Individual ID	Status	Modified On	Address Line 1	Age Band	Date of Birth	First Name	LDC	Last Name
167580	Active	20/Jun/2019 19:...	[Redacted]	[Redacted]	[Redacted]	[Redacted]	South Tipperary...	[Redacted]

- If the report identifies a possible duplicate with the same name but upon investigation you are confident that the two records only share the same name you can add the Individual ID number to the name to differentiate the records. This will avoid you having to check the records again if they are returned as potential duplicates in the future.
- Duplication detection jobs can also be run from the entity view screens, by clicking on the Duplication Detection icon and following instructions (see step 5-6).

The screenshot shows the SICAP Social Inclusion & Community Activation Programme interface. The top navigation bar includes 'Performance...' and 'Individuals >'. Below this is a toolbar with buttons for '+ NEW', 'EDIT', 'ACTIVATE', 'DEACTIVATE', 'DELETE', and 'DETECT DUPLICATES'. The 'DETECT DUPLICATES' button has a dropdown arrow highlighted with a red box. The dropdown menu is open, showing two options: 'For Selected Records' and 'For All Records on All Pages'. A red arrow points to the 'For All Records on All Pages' option. Below the toolbar, the entity name 'ESF AUDIT SAMPLE' is displayed. A table below shows a list of records with columns for Individual ID, Date of Registration Meeting, Date of Birth, Age Band, and Person with a Disability.

Individual ID	Date of Registration Meeting	Date of Birth	Age Band	Person with a Disability
107392	6/Feb/2018		25-35	No
117849	26/Feb/2018		15-24	Requested but not provided

- Go to Data Management to view the results (as per steps 1-2 and 7-10 above).