



# USER GUIDE

## Data Preparation

Release 10.1-MP4 (April 20, 2021)

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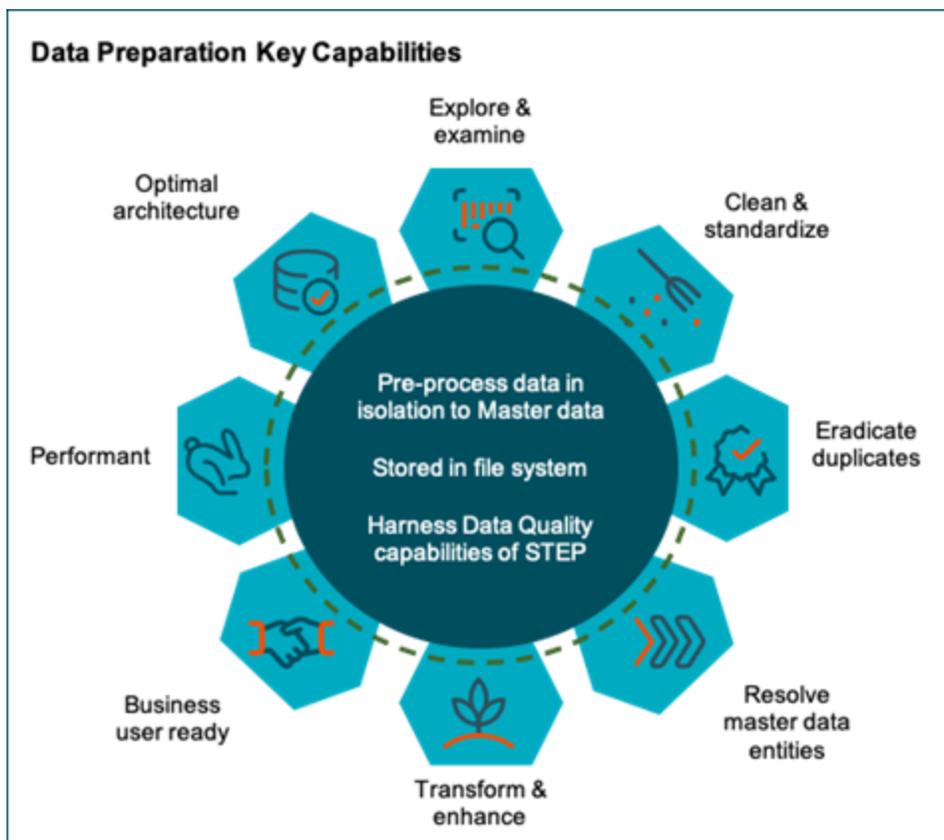
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# Data Preparation

Data Preparation is a process of exploring, combining, cleansing, deduplicating, and transforming data prior to business utilization or consumption.

Stibo Systems Data Preparation provides the ability to preprocess data, in isolation, before it becomes master data, in support of several use cases, including:

- Indirect customer processing – Resolve indirect customer master data entities from transactional data provided by direct customers (distributors), enabling Consumer Packaged Goods (CPG) customers and manufacturers to gain insight into their customers' customers.
- Prospect list processing optimization – Allow marketers to qualify and prepare prospect lists, thus reducing marketing campaign costs and speeding time to market.
- Mergers & Acquisition (M&A) support - Manage the deluge of data inherent with M&A activity.
- Optimal master data ingestion - prepare master data prior to onboarding into STEP.



- **Explore and examine** - Process data to derive business insight and assess data quality by understanding what problems exist and what corrective actions need to be taken. Data profiling provides useful insights such as which values are frequently used, which are missing, and which are rare, metric scores, patterns in data,

and other points of interest. These data points help users better understand data and what needs to be done to prepare that data for injection.

- **Clean and standardize** - Correct data errors and validate data against authoritative sources (such as address verification) ensuring data is accurate, up to date, and fit for purpose.
- **Eradicate duplicates** - Remove duplicates from a single data set, across multiple data sets and compare against master data.
- **Resolve master data entities** - Reconcile and augment master data entities.
- **Transform and enhance** - Transform and enhance list(s) by filtering, transforming, and enriching lists.
- **Business user ready** - Enable business users to leverage STEP data quality capabilities without the involvement of IT.
- **Performant** - Use heavy parallel processing, lightweight to delete, simple to retry.
- **Optimal architecture** - Process data in isolation from master data. Because data is stored on the app server file system (not in memory), the architecture helps drive performance.

# List Processing

The list processing component allows users to leverage STEP functionality to process lists of entities without having to add the entities as master data. List processing can help responsible parties, such as marketing personnel, to prepare lists of prospects by processing large rented customer lists and help CPG and manufacturing companies to process and analyze lists of indirect customers provided by their direct customers, such as distributors.

With the list processing component, users can:

- Import lists of records
- Assess quality of the list records using data profiling
- Remove records of poor data quality
- Bulk update records
- Deduplicate records
- Export processed lists

**Important:** Lists can contain anywhere from a few records with very few attributes up to hundreds of millions of records, each with a large number of attributes. Processing time depends on the size of a list. Lists are processed in Background Processes in order to manage time-consuming operations and use parallel processing. Users can monitor the progress of a background process and/or perform other duties, while the list processing executes.

## Configurations and Use

The following setup is required:

- Configuring List Processing in Workbench
- Configuring List Processing in Web UI

Working with list processing includes information defined in the following topics:

- Creating Lists
- Processing Lists
- Exporting a Processed List

## Considerations

Be aware of the following information before processing lists:

- List processing cannot be reverted
- Background process logs include statistics, warnings, and errors

## List Processing Cannot Be Reverted

Users should take caution when creating the list process configurations. In the following example, a business rule that always returns a value of false, purges the entire dataset. Since the business condition was valid on the record object types, the process proceeded without errors.

**CL-120433** Customer List • ID: CL-120433

0 records • Created: 11/17/2020, 12:38:48 AM

**Profile Findings**

Process list ▼
 Import list
 Export list

### Process Reports

<span style="color: green;">✓</span> <b>Cleanse List Data</b>	<b>Complete</b>
Started	11/17/2020, 12:47:07 AM <a href="#">Details</a>
Finished	11/17/2020, 12:47:07 AM
User	USERE
Total records processed	26
<b>Operation</b>	<b>Records Affected</b>
✓ 1. Filter by 'BCAlwaysFalse'	<span style="border: 1px solid red; padding: 2px;">-26</span>

**Important:** While there is no method to revert a list processing operation after it has been completed, you can upload the original file to a new list entity and apply all processing operations again.

## Background Process Logs Include Statistics, Warnings, and Errors

When a list process operation fails or completes with errors, review the BGP logs by clicking the Details link on the process. Users with a successful list process may also see useful information in the logs. For more information, see the **Background Process Node Details Screen** in **Web User Interfaces / Web UI Getting Started** documentation.

✓ Identify True Prospects Complete

Started 11/27/2020, 4:16:24 PM  
 Finished 11/27/2020, 4:17:05 PM  
 User USERE

[Details](#)

Total records processed 9,999

Operation	Records Affected
✓ 1. Filter by 'IsCityPresent'	-4 ↓
✓ 2. Set single value [Gender]	9995
✓ 3. Deduplication by 'ListProspectDeDupe'	0

### Details of the background process

Started By USERE  
 ID BGP\_411247  
 Template ID ListProcessing  
 Status ✓ Succeeded  
 Started 11/27/20 4:16:24 PM  
 Elapsed 46 s  
 Finished 11/27/20 4:17:05 PM

 Export

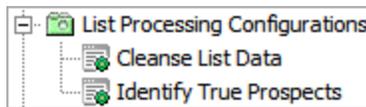
ID	Type	Text
10	Info	Started to process the list: Identify True Prospects
20	Info	Starting operation: Filter by 'IsCityPresent'
30	Info	Starting operation: Set single value [Gender]
40	Info	Setting new parallel degrees to 2 concurrent workers.
180	Info	Finishing operation: Filter by 'IsCityPresent'
190	Info	Filter by 'IsCityPresent'
200	Info	Passed 9995
210	Info	Filtered 4
220	Info	Failed 0
230	Info	Total Processed 9999
240	Info	Finishing operation: Set single value [Gender]
250	Info	Bulk update
260	Info	Total Processed 9995

270 Info Updated 9995

# Configuring List Processing in Workbench

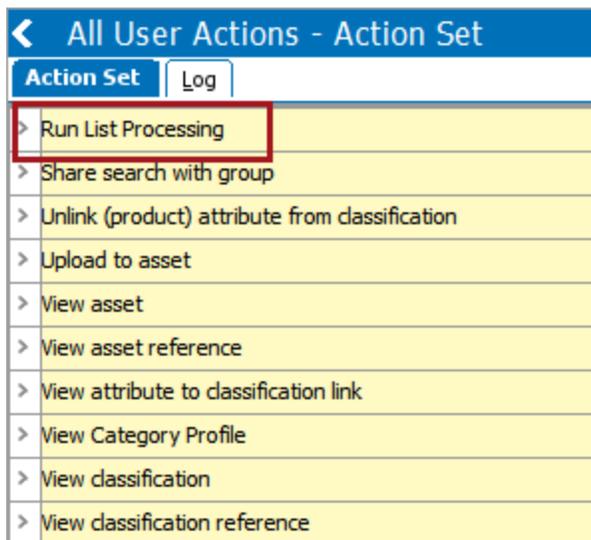
Using List Processing includes the following prerequisites and configuration steps.

The following list processing configuration examples are further explained in the **Processing Lists** topic.



## Prerequisites

1. Activate the list processing commercial license on your system. Contact your Stibo Systems account manager or partner manager for assistance.
2. Configure the 'Run List Processing' user action for the group of users who will run List Processing. For information on adding user actions, see the **Maintaining Action** topic in the **System Setup / Super User Guide** documentation.



3. Define import and export configurations to handle the inbound and outbound list files. For more information, see the **Maintaining a Saved Import Configuration** topic and the **Maintaining a Saved Export Configuration** topic in the **Data Exchange** documentation.

## Configuration

To use the list processing functionality users must provide the workbench configuration defined in the following topics:

- **List Processing Model Lists and Records** - create the list processing object types and default data profile
- **List Processing Component Model** - assign object type(s) to the List Processing component model
- **List Processing Configuration** - define the object types allowed for processing
- **List Processing Configuration Operations** - Define the operations that will run during processing, including 'Remove duplicates' in lists and survivorship rules if necessary

# List Processing Model Lists and Records

Setting up an entity object type hierarchy structure for list processing includes:

- A **list** entity object type. There can be multiple list types defined in the system, each with their own unique set of attributes. Lists must be organized in the primary hierarchy, as with any other entity.
- A **record** child entity object type under the list object type. There can be records of multiple object types in a list. A record may have references to master data entities in the system. There cannot be references from master data entities to a record in a list. A record in a list must be globally revised.

Any ID pattern provided on the object type of a record in a list is ignored. A universally unique identifier (UUID) is assigned to each record, as it is imported into a list. The record's UUID remains stable throughout the lifetime of the list. The assigned record UUID can be exported.

**Important:** If an object type of a record in a list is deleted, the following processing or export of the list will fail. If the object type is created again, it will again be possible to process and export the list.

If attributes, reference types, or data container types of values of records in lists are deleted, the processing of lists with such data will still be possible, but that data will be removed from the records the first time those records are updated.

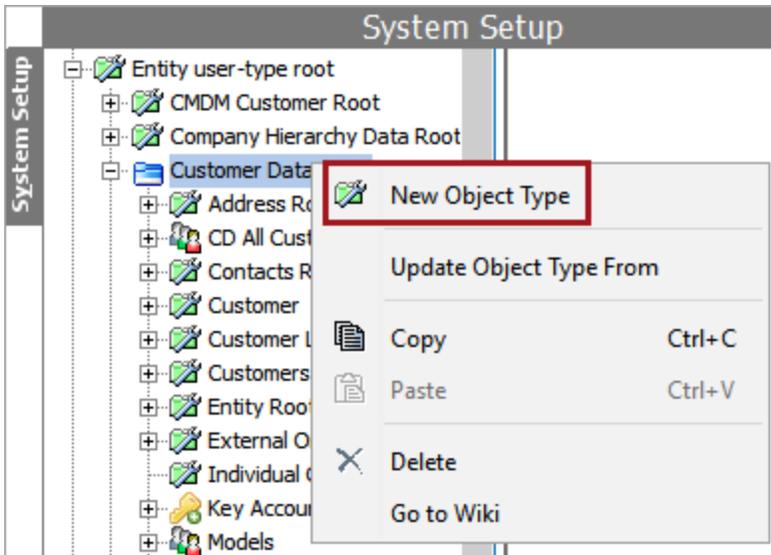
Should a given attribute, reference type, or data container type be deleted and recreated while there are records in lists with the same values, those values will remain.

For more information, see the **Object Types and Structures** topic in the **System Setup / Super User Guide** documentation.

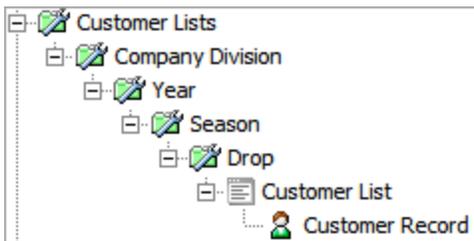
## Configure List Object Types and Default Data Profile

The following set up provides the required objects for the Component Model:

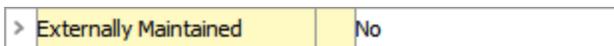
1. On the System Setup tab, under 'Object Types & Structures,' right-click on the desired parent node and select 'New Object Type.' In this guide, the parent node 'Entity user-type root' holds the 'Customer Data Root' node. This second parent will hold the new object type.



- In the Create Object Type dialog box, enter a value for the ID and Name text fields. In the screenshot below, the structure shown is used for a business hierarchy. Customer Lists, Company Division, Year, Season, Drop, and Customer List were all created as ways to structure a list processing instance. The Customer Record object was made valid for the Customer List object type.



- Ensure attributes on records in a list are set as 'No' for the 'Externally Maintained' parameter. List processing cannot process externally maintained attributes on records in the list.



- Define a default profiling configuration on the newly created object type. For more information, see the **Data Profiling** documentation.

Description	
Name	Value
ID	CustomerList
Name	Customer List
Name Pattern	
ID Pattern	
Enable Profiling	Yes
Default Profiling Configura...	Individuals Profiling

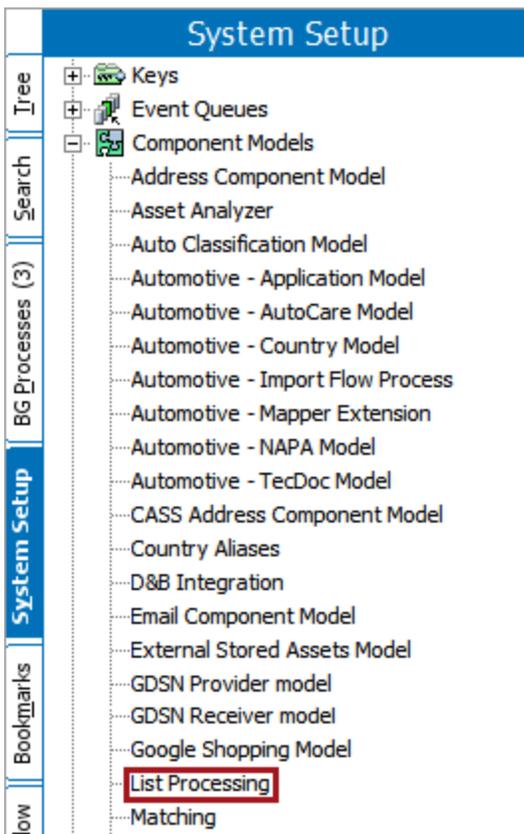
- Configure the component model as defined in the **List Processing Component Model** topic to select which of the created object types can hold lists.

# List Processing Component Model

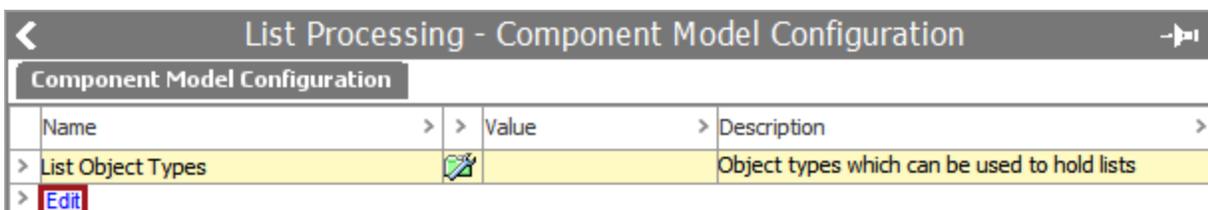
The List Processing component model allows users to set the object type(s) that may hold lists. Users must complete this one-time setup for list processing to function correctly.

## Configure List Processing Component Model

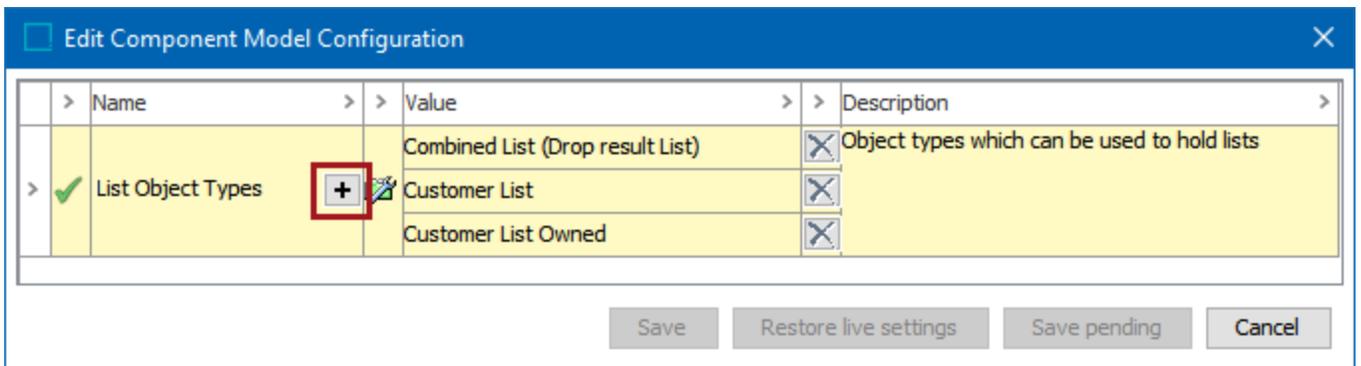
1. From the System Setup tab, select the 'Component Models' node, then select the 'List Processing' option.



2. Click the 'Edit' button below the List Object Types entry on the component model to display the 'Edit Component Model Configuration' dialog.



- On the 'Edit Component Model Configuration' dialog, click the plus button (+) to choose the object type(s) that can hold a list. In this example, the list object types are shown in the 'Value' column since they are valid list processing object types.



- Click the **Save** button to save the selected object type(s) and close the dialog.
- Configure a List Processing Configuration object to work with the component model as defined in the **List Processing Configuration** topic.

# List Processing Configuration

Processing of lists is based on a List Processing Configuration which defines a sequence of operations that can be applied to a specific list. Each operation is applied to records in the list using the order defined in the configuration. When an operation is applied to a record, the record is an entity. The parent of a record in a list is always the list entity to which it belongs.

The following completed and functional List Processing Configuration (also shown fully in the **Processing Lists** topic) filters out records with no city value present, sets values for 'Gender,' then sets a value for 'Last Name,' and using the 'ProspectsMatchingAlgorithm,' deduplicates the list of redundant records.

← Identify True Prospects rev.0.1 - List Processing Configuration →

List Processing Configuration
Log
Status

🔍 Description

Name	>	>	Value
> ID			IdentifyTrueProspects
> Name			Identify True Prospects
> Object Type			List Processing Configuration
> Revision			0.1 Last edited by USERE on Fri Oct 02 14:47:00 EDT 2020
> Path			List Processing Configurations/List Processing with Deduplication

🔍 Valid List Object Types

ID	>	>	Name
> Customer List			Customer List
<a href="#" style="color: #007bff; text-decoration: none;">Add Object Type</a>			

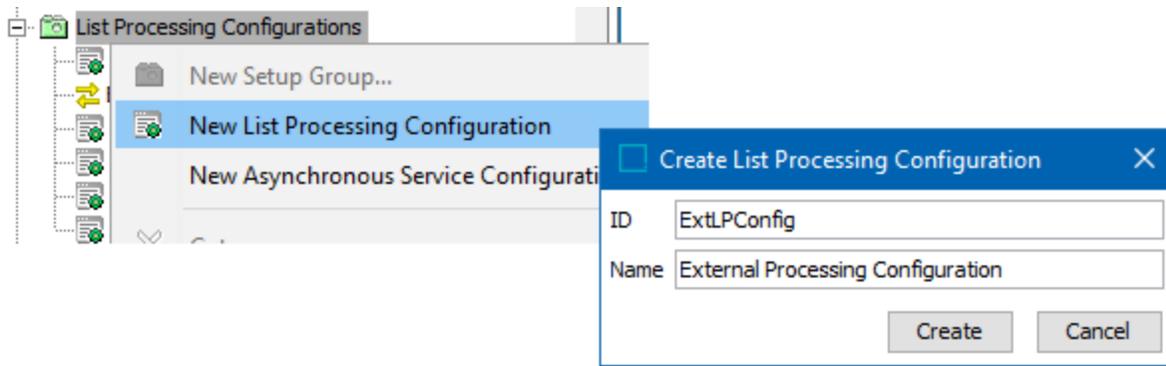
🔍 Operations

Operation	>	>	Configuration
> Filter			Filter by 'IsCityPresent'
> Set Value			Set single value [Gender]
> Set Value			Set single value [LastName]
> Deduplication			Deduplication by 'ProspectsMatchingAlgorithm'

[Edit Operations](#)

## Create a List Processing Configuration

1. From the System Setup tab, create a valid parent type for the List Processor as set during the object type creation.
2. Right-click on the parent node, then select 'New List Processing Configuration' to open the 'Create List Processing Configuration' dialog.



3. Provide a name and ID and click the **Create** button.
4. Open the Valid List Object Types flipper, click the **Add Object Type** link and choose the object type(s) set in the list component model.

**Note:** This list processor configuration can only be executed on selected list object types. Without an object type value, the List Processing Configuration is not a selectable option in the Web UI 'Process list' dropdown.

Identify True Prospects rev.0.1 - List Processing Configuration

List Processing Configuration | Log | Status

Description

Name	Value
ID	IdentifyTrueProspects
Name	Identify True Prospects
Object Type	List Processing Configuration
Revision	0.1 Last edited by USERE on Fri Oct 02 14:47:00 EDT 2020
Path	List Processing Configurations/External Processing Configuration

Valid List Object Types

ID	Name
<a href="#">Add Object Type</a>	

Operations

Operation	Configuration
<a href="#">Edit Operations</a>	

5. In the Operations flipper, click the **Edit Operations** link and select the relevant operations. See the **List Processing Operations** topic for explanations of the available operations.

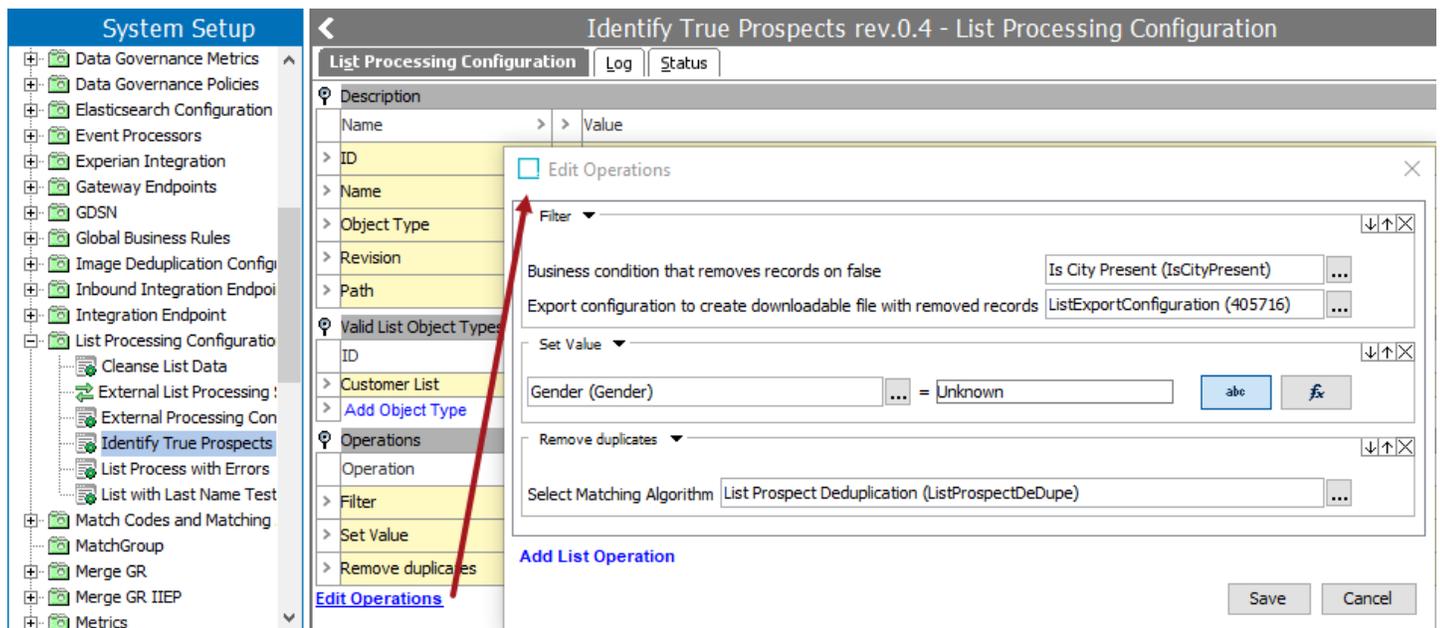
**Important:** The order of operations in this configuration will be the order that they are performed on the list. This consideration is important because if values are changed before unwanted records are filtered, it will cause a longer processing time with no added benefit.

6. Set up the Web UI for List Processing as defined in the **Configuring List Processing in Web UI** topic.

# List Processing Operations

A List Processing Configuration includes one or more operations for processing a list.

The majority of the list processing operation types use existing bulk update operations supported by STEP, while the Remove Duplicates, and Filter operation types are designed specifically for list processing. There is no limit to the number of operations that can be executed per list and operations are run in the order they are added to the Edit Operations dialog.

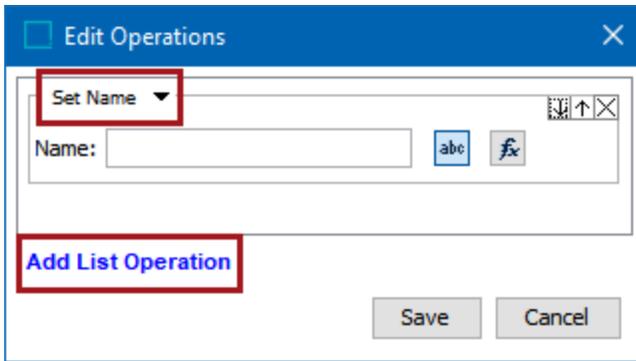


To add an operation on a List Processing Configuration:

1. On the Operations flipper click the 'Edit Operations' link.
2. On the Edit Operations dialog click the 'Add List Operation' link.

Available operations are defined in the following topics:

- **List Processing Bulk Update Operations**
- **List Processing Remove Duplicates Operation**
- **List Processing Filter Operation**



3. Select the desired operation (each is defined below) from the dropdown menu and complete the necessary parameters.
  - Click the **Add List Operation** link again if more operations are required.
  - Click the up or down arrow buttons () to reorder the operations.
  - Click the X button () to remove an operation.
4. Click the **Save** button or **Cancel** button to return to the List Processing Configuration tab.

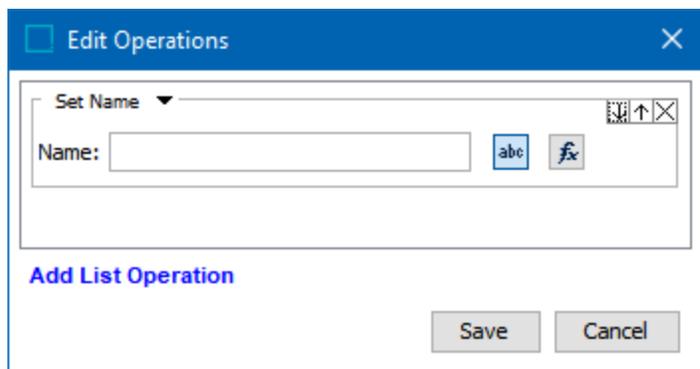
# List Processing Bulk Update Operations

The bulk update operations listed below are available in List Processing. Details are included in the Bulk Updates documentation which can be accessed as shown below.

After adding all necessary operations, continue with Web UI setup as defined in the **Configuring List Processing in Web UI** topic.

## Set Name

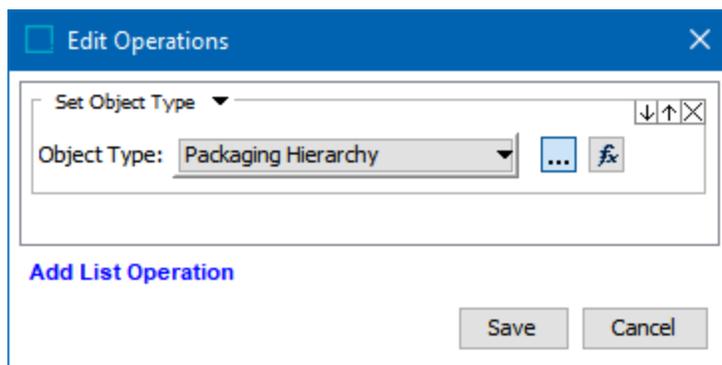
The 'Set Name' operation sets the name of records in the list. For more information, see the **Set Name Operation** topic in the **Bulk Updates** documentation.



The screenshot shows a dialog box titled "Edit Operations" with a close button (X) in the top right corner. Inside the dialog, there is a section for "Set Name" with a dropdown arrow. Below this, there is a text input field labeled "Name:" followed by a blue button with "abc" and a grey button with a function symbol (fx). To the right of the input field are three small icons: a double-down arrow, a double-up arrow, and a close icon (X). Below the input field is a blue link labeled "Add List Operation". At the bottom of the dialog are two buttons: "Save" and "Cancel".

## Set Object Type

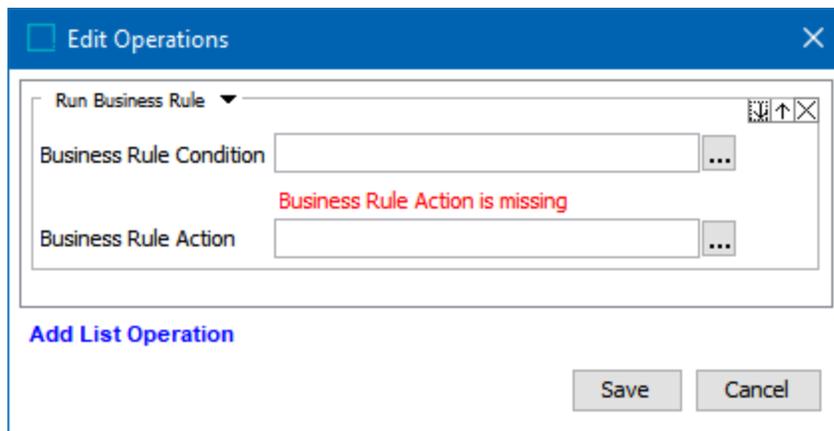
The 'Set Object Type' operation changes the object type of the records in the list. For more information, see the **Set Object Type Operation** topic in the **Bulk Updates** documentation.



The screenshot shows a dialog box titled "Edit Operations" with a close button (X) in the top right corner. Inside the dialog, there is a section for "Set Object Type" with a dropdown arrow. Below this, there is a dropdown menu labeled "Object Type:" with "Packaging Hierarchy" selected. To the right of the dropdown are a blue button with three dots (...) and a grey button with a function symbol (fx). To the right of the dropdown menu are three small icons: a double-down arrow, a double-up arrow, and a close icon (X). Below the dropdown menu is a blue link labeled "Add List Operation". At the bottom of the dialog are two buttons: "Save" and "Cancel".

## Run Business Rule

The 'Run Business Rule' operation allows users to specify an optional condition and/or a mandatory action that will be evaluated based on the list records with the limitations noted below. For more information, see the **Run Business Rule Operation** topic in the **Bulk Updates** documentation.



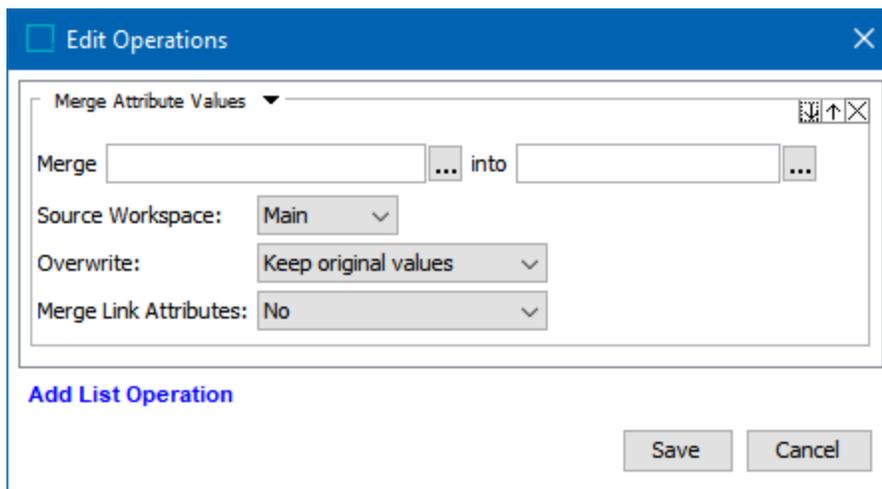
The following business actions are supported:

Parent Menu Name	Operation	Supported	Comments
Attribute Values	Merge Attribute Values	Partially	Attribute links and workspaces are not supported
Data Quality	Standardize Address	Yes	
References and Links	Add Reference	Partially	Only with entity references
References and Links	Automatic Classification	Partially	Only with entity references
References and Links	Remove Reference	Yes	
Value Generator	Release a Value	Yes	
Value Generator	Assign a Value	Yes	
	Execute JavaScript	Yes	
	Reference another Business Action	Yes	
	Send Email	Partially	Not supported with workflows
	Set Attribute	Yes	

Parent Menu Name	Operation	Supported	Comments
	Set Name	Yes	
	Set Object Type	Yes	

## Attribute values > Merge Attribute Values

The 'Merge Attribute Values' operation combines the values of a set attribute value into a specified destination attribute. For more information, see the **Attribute Values: Merge Attribute Values Operation** topic in the **Bulk Updates** documentation.

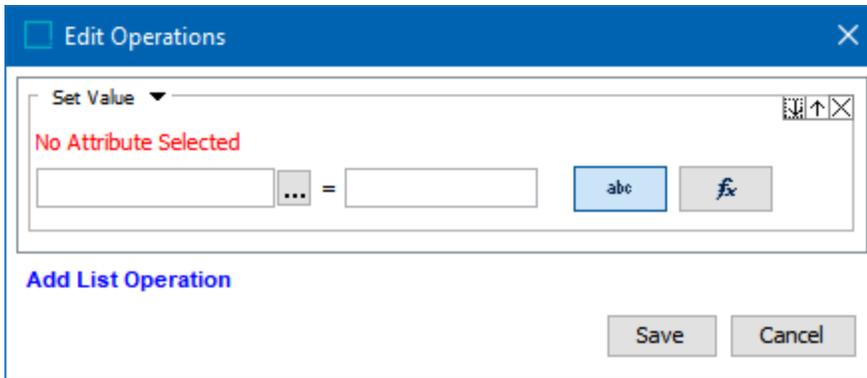


The screenshot shows a dialog box titled "Edit Operations" with a close button (X) in the top right corner. Inside the dialog, there is a section for "Merge Attribute Values" with a dropdown arrow and a refresh icon. Below this, there are two input fields for "Merge" and "into", each followed by a browse button (...). Underneath, there are three dropdown menus: "Source Workspace" set to "Main", "Overwrite" set to "Keep original values", and "Merge Link Attributes" set to "No". At the bottom left, there is a blue link "Add List Operation". At the bottom right, there are "Save" and "Cancel" buttons.

**Important:** Since workspace setting and linking attributes only make sense for master data entities in the STEP database, these settings will not affect list records as these records are stored in isolation.

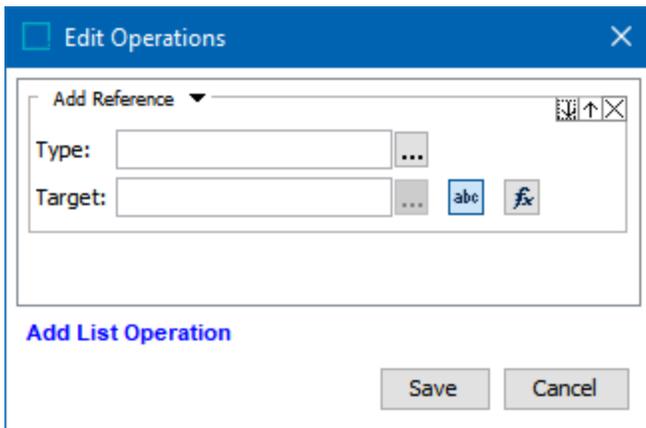
## Attribute values > Set Value

The 'Set Value' operation allows users to first specify a system attribute and then apply a value to all records with that attribute in the list. For more information, see the **Attribute Values: Set Value Operation** topic in the **Bulk Updates** documentation.



## References and Links > Add Reference

The 'Add Reference' operation creates a reference between records when using a list. For more information, see the **References and Links: Add Reference or Add Referenced By Operations** topic in the **Bulk Updates** documentation.



## References and Links > Remove Reference

As an inverse of the 'Add Reference' operation, the 'Remove Reference' operation removes pre-populated references on records in a list. For more information, see the **References and Links: Remove Reference Operation** topic in the **Bulk Updates** documentation.

The screenshot shows a dialog box titled "Edit Operations" with a close button (X) in the top right corner. The main content area has a dropdown menu set to "Remove Reference". Below this, there are two input fields: "Type:" and "Target:". Each field has a three-dot menu icon to its right. To the right of the "Target:" field are two buttons: "abc" and "fx". Below the "Target:" field is a checkbox labeled "Remove all targets". At the bottom left of the dialog is a blue link labeled "Add List Operation". At the bottom right are two buttons: "Save" and "Cancel".

## Data Quality > Standardize Address

The 'Standardize Address' operation ensures that the records in the list have the expected information and format of addresses. For more information, see the **Data Quality Standardize Address Operation** topic in the **Bulk Updates** documentation.

**Important:** A CASS Certification Report Event Processor must not be configured.

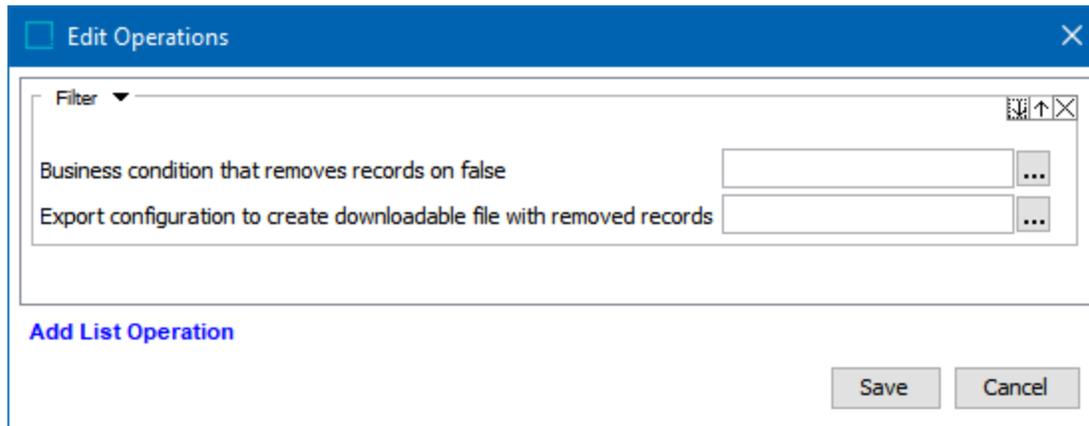
The screenshot shows a dialog box titled "Edit Operations" with a close button (X) in the top right corner. The main content area has a dropdown menu set to "Standardize Address". Below this, there are several settings:
 

- "Address Standardization Mode" is set to "Overwrite Existing Standardized Address" (shown in a dropdown menu).
- "Renew address validations older than (if left empty, this option is ignored)" is set to "160" with a spinner control, followed by the text "Days".
- "Turn on CASS validation for US addresses" has an unchecked checkbox.
- "CASS Certification Report Event Processor" has an empty text field with a three-dot menu icon to its right.

 At the bottom left of the dialog is a blue link labeled "Add List Operation". At the bottom right are two buttons: "Save" and "Cancel".

# List Processing Filter Operation

The Filter operation removes evaluated records that do not satisfy the business condition and allows those records to be exported for review. Removed records may be reviewed by a data steward so they can be updated.

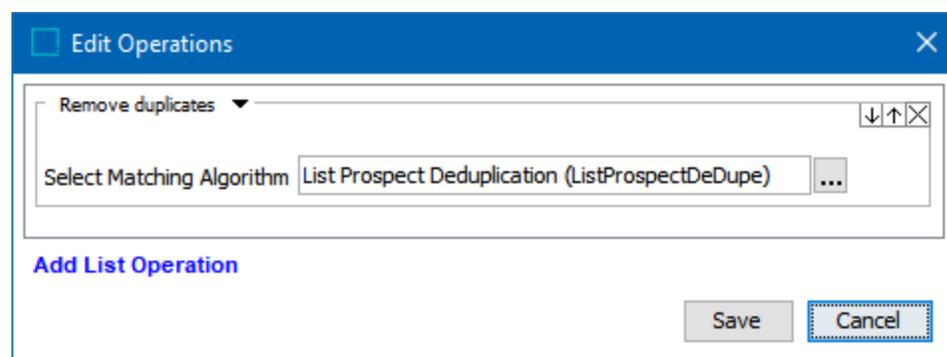


- **Business condition that removes records on false** - select a business condition that determines which records should be removed. Records that return 'false' are moved.
- **Export configuration to create downloadable file with removed records** - select an export configuration to create an exported file with all the records that were removed after applying the business condition.

After adding all necessary operations, continue with Web UI setup as defined in the **Configuring List Processing in Web UI** topic.

# List Processing Remove Duplicates Operations

The 'Remove duplicates' operation uses a preconfigured Matching Algorithm to merge and remove duplicate records in a list. The selected matching algorithm must be configured to use the 'List Processing Deduplicate Records' Match Action to be valid in this list operation, otherwise a validation error will be presented.



Match groups are created based on the match codes assigned to every record in the list. If a record has more match codes, the record is included as part of more match code groups.

Within a match group, each record will be compared with the other records individually. Duplicate candidate records are added to a match group when the matching algorithm with the source record scores higher than the configured auto-merge threshold. If the source record is in another match code group, and new duplicate candidates are found, these records will be added to the first match group.

For performance reasons, each record will only be compared to the first hundred records. To decrease the size of match groups, consider match tuning the matching algorithm that the list process uses. For more information, see the **Tuning and Monitoring a Matching Algorithm** topic in the **Matching, Linking, and Merging** documentation.

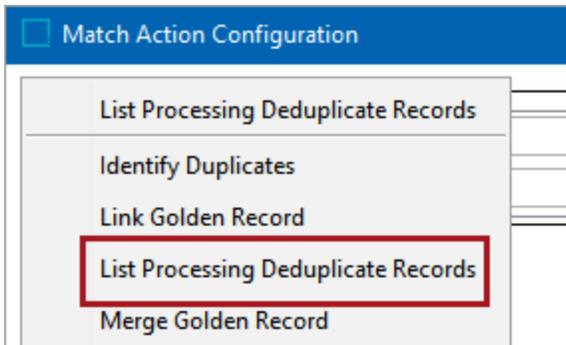
Within each match group, the system selects an arbitrary record. If a 'Merge Keep First Handler' business condition is configured on the List Processing Deduplicate Records match action it will be executed and allowed to select the surviving record. The non-surviving records are removed from the remaining match groups, so that these records will no longer be used to compare with other records.

To use this operation, users must configure a matching algorithm for deduplication as defined in the **Configuring Matching Algorithm for List Deduplication Operation** section below. For more information, see the **Configuring Matching Algorithms** topic in the **Matching, Linking, and Merging** documentation.

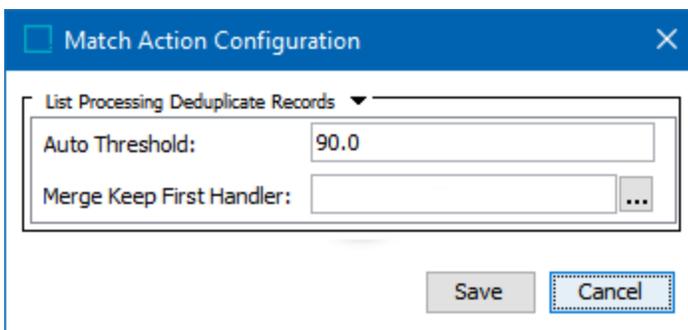
Survivorship rules can be configured to allow moving individual values from multiple non-surviving records to the surviving record. Only the Business Action survivorship rule is supported for list records; changes to the surviving record will not trigger a new matching action on that record. For more information, see the **Configuring the Business Action Survivorship Rule for List Processing** section below.

## Configure a Matching Algorithm for the List Deduplication Operation

1. On the matching algorithm object, click the Edit Match Action link and select the 'List Processing Deduplicate Records' match action.



2. On the 'List Processing Deduplicate Records' operation configuration dialog, configure as follows:



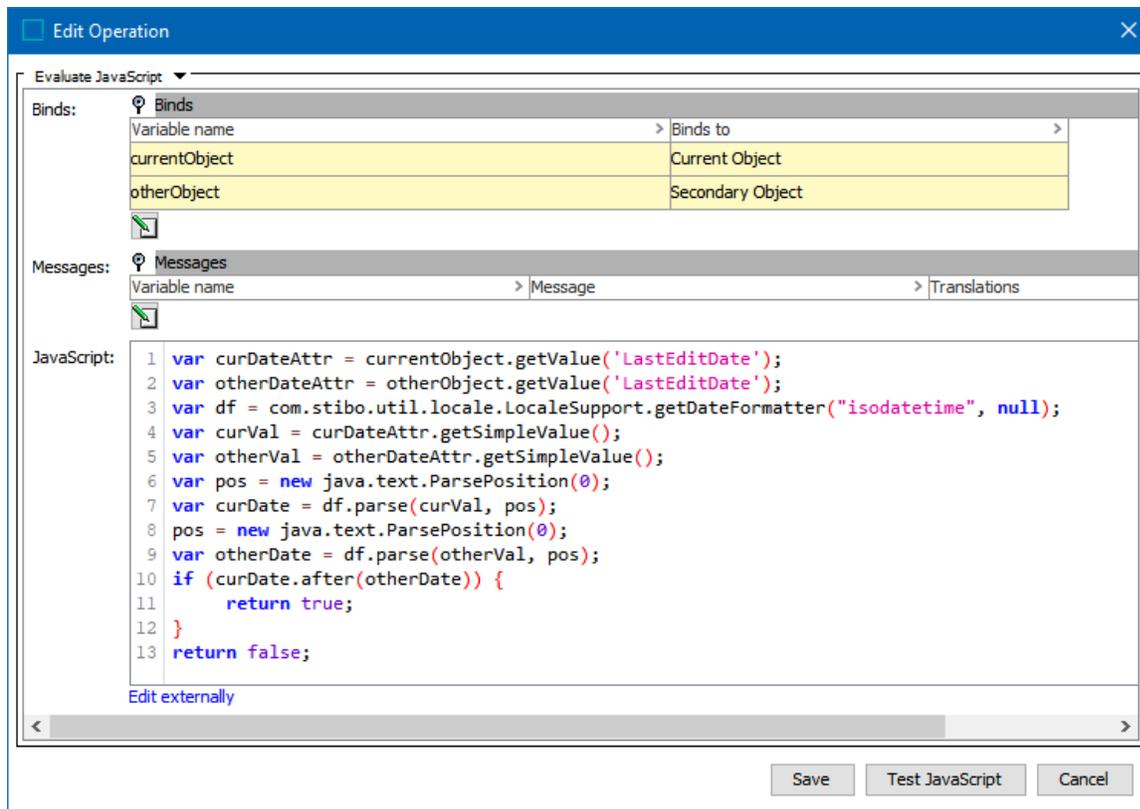
- For the **Auto Threshold** parameter, set the value above which the records are auto-merged.
- For the **Merge Keep First Handler** parameter, optionally set a business condition that will decide which of two duplicate records would survive. If no business condition is configured, the surviving record is selected randomly.

The following JavaScript binds may be used to configure a Merge Keep First Handler business condition.

- **Current Object** - the current record
- **Secondary Object** - the identified duplicate record

**Note:** Duplicate and Non-Duplicate types are not necessary for this match action and will be ignored if those types are configured.

The following is an example of a configured Match Keep First Handler condition.



3. Configure the survivorship rules for the matching algorithm as defined in the following section.

## Configure the Business Action Survivorship Rule for List Processing

Survivorship rules are used to move data values from the non-surviving records to the surviving records. When configuring, it is possible for the survivorship rule source object bind to have multiple source records. For more information, see the **Survivorship in Match and Merge** topic in the **Matching, Linking, and Merging** documentation.

**Note:** Only business action survivorship rules are supported for this option. If any other survivorship rules are configured, these are ignored and cause configuration validation warnings.

When configuring the survivorship rules for the list processing deduplication algorithm, only two JavaScript binds are acceptable:

- **Current Object** - the record that survives
- **Survivorship Rules Source Objects** - the non-survivor duplicate record

The following is an example of a fully configured List Processing Deduplication matching algorithm. For more information, see the **Configuring Matching Algorithm** topic in the **Matching, Linking, and Merging** documentation.

**LP MA 1 - complex - Matching Algorithm**

[Matching Algorithm](#) | [Match Result](#) | [Score Distribution](#) | [Statistics](#) | [Confirmed Duplicates](#) | [Confirmed Non Duplicates](#) | [Log](#)

**Definition**

Name	>>	Value	>
ID		LP MA 1 - complex	
Name		LP MA 1 - complex	
Last edited by		2020-11-10 16:20:53 by USERE	
Match Code		LP MC 1 (LP MC 1)	...
Matching Context		English US	
Matching Workspace		Main	
Duplicate Type		ConfirmedDuplicate (ConfirmedDuplicate)	...
Non-Duplicate Type			...

**Configuration Validation Status**

**Global Binds**

Name	>	Refers to	>
------	---	-----------	---

[Edit Global Binds](#)

**Match Criteria**

Name	>	Criterion	>	Weight	>
LP MA DT 1		Decision Table: Data Elements 1, Matchers 1, Rules 1		10.0	

[Add Criterion](#)

**Evaluator**

Select Nodes  ...

**Match Action**

Match Action	>
Create Threshold: 90.0	
Merge Keep First Handler: LP_MKFH_complex	

[Edit Match Action](#)

**Survivorship Rules**

Criterion	>
LP_SSR_complex: Business Action	
Name: Most Recent Name	

[Edit Survivorship Rules](#)

After adding all necessary operations, continue with Web UI setup as defined in the **Configuring List Processing in Web UI** topic.

# Configuring List Processing in Web UI

This topic will guide users through the process of creating the screens required to import, process, and export customer lists in the Web UI.

## Prerequisites

Before the Web UI configurations can be done, workbench configurations are required. See the **Configuring List Processing in Workbench** topic in this documentation. It is expected that anyone configuring the List Processing component is familiar with the Web UI designer as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

## Configuration

In the Web UI, these configurations are required to use List Processing:

- A Processing List Screen
- A mapping from the object type to the Processing List Screen
- A Create Processing List' action button
- An optional Below Title Entity Summary Card with Profile information

Once mapped, users may use the list processing in the Web UI. For more information, see the **Processing Lists** topic in this documentation.

## Create a Processing List Screen

In design mode, click 'New' to create a new screen. Navigate to the 'Processing List Screen.' Give it an ID then select 'Add.' There are no further possible configurations on this screen.

## Add Screen

Screen ID

List Processing Screen

- PLM Schedule Template
- Packaging
- Partial Approval Dialog
- Planned Spread Screen
- Policy Details
- Policy List
- Power BI Screen
- Power Search
- Print On Demand
- Processing List Screen
- Product Editor
- Product Summary

Screen for showing processing list status

Filter

Show deprecated components

Cancel
Add

### Map the Object Type to the Screen

To ensure that the List Processing Screen is configured to show contents of a particular list object type, a mapping must be configured. There is nothing to configure in the List Processing Screen, so the same screen type must be used to show content for any list object type in the system. Under [--MAIN--] in the designer, select 'Add' under the field for the 'Mappings' parameter. The new mapping should be configured as follows:

Conditions: [Object Type set in the component model]

Screen: Created List Processing Screen that was created in this topic.

### Edit component

#### Screen Mapping Properties

Component Description A mapping rule that will forward to the specified screen if all supplied conditions are satisfied.

\* Conditions ObjectType = CustomerList Add... Edit... Remove Up Down

\* Screen List Processing Screen Add

Cancel Save

### Properties

Configuration Web UI style

---[MAIN]---

Save Close New... Delete Rename Save as...

#### Main Properties

Component Description MAIN is used for configuring the overall behaviour of the Web UI. For example by setting up conditional mappings it is possible to decided the behaviour when navigating the Web UI. In addition the different side panels (left, right, top, bottom) and Corner bar can be configured on MAIN.

Mappings List Processing Screen (ObjectType = Cus Add... Edit... Remove Up Down

Left Width 280

#### Child Components

Left Global Navigation Panel Add... Remove Up Down

Corner Bar <Select a child compo [go to component](#)

To set up this screen, users must first add the list entity object types, which in this example are 'CustomerList,' to the List Component Model in workbench. For more information, see the **Configuring List Processing in Workbench** topic in this documentation.

### Add 'Create Processing List' action button

To import and create lists in the system, a 'Create Processing List' action button must be added to the valid Node List. In this example, the button was added and named 'Create List.' For information on adding action buttons to a Web UI screen, see the **Action Button Configuration on a Node List** topic in this **Web User Interfaces / Web UI Getting Started** documentation.

The screenshot displays two main components of the STIBO SYSTEMS web interface:

- Showing lists in Drop:** A top navigation bar with buttons for "Select all", "Show Details", "Create List" (highlighted with a red box), and "Delete". Below this is a table header with a "Title" column.
- Properties Panel:** A configuration window titled "Properties" with tabs for "Configuration" and "Web UI style".
  - Node List Properties:** Includes a "Component Description" and configuration options: "Hide Standard Buttons" (unchecked), "\* ID" (text input: "becbacfbacf"), and "Include Labels" (checked).
  - Child Components:** Contains two sections:
    - Display Modes:** A dropdown menu set to "Table Display Mode".
    - Actions:** A list of actions including "Create Processing List" (highlighted with a red box) and "Delete From Grid Action (Delete)".

## Add Entity Summary Card with Profile

While this setup is optional, it is useful for identifying the list object being displayed in Web UI. The Entity Summary Card (number 1 in the following image) displays details about the selected list and can include profile information while showing the processing actions and report on a tab (number 2 in the following image).

2020 > Spring > ACME 1

## Summer Customers

SumCust • 0.1 • Last edited by User J on March 4, 2021 at 1:35:19 PM UTC-5 0 Profile Findings

---

Actions and Reports 2

Process list Import list Export list

### Process Reports

✓ Import	Complete
Started	03/04/2021, 1:35:21 PM
Finished	03/04/2021, 1:36:42 PM
User	USERJ
Imported records	9,999
<a href="#">Details</a>	

✓ Upload	Complete
Started	03/04/2021, 1:35:19 PM
Finished	03/04/2021, 1:35:20 PM
User	USERJ

### Node Details Properties

Component Description Top level component for creating a node editor. Can edit any node type. Also works for editors that depends on STEP Workflow.

Title

Css Class

Show Title

▶ Validation

▶ Multiple Target References

---

### Child Components

Below Title 1  [go to component](#)

Main 2  [go to component](#)

Buttons  [go to component](#)

1. In design mode, click 'New' to create a new screen. Navigate to 'Node Details,' give it an ID, then select 'Add.'
2. In the Child Components section, for Below Title, select the Entity Summary Card.
  - Click the 'go to component' link.
  - For Primary Summary Card Section, select Description Card from the dropdown.
  - For Secondary Summary Card Section, select Data Profile from the dropdown. For more information, see the **Data Profiling in Web UI** topic and **Profile Configuration** topic in the **Data Profiling** documentation.
  - Click the 'go to parent' link.
3. In the Child Components section, for Main, select Tab Control.
  - Click the 'go to component' link.
  - In the Child Components section, for Tab Pages, click the 'Add' button.
  - On the 'Add Component' dialog, select 'Sub Screen Tab Page' and click the Add button
  - On the 'Add component - configure required properties' dialog, for Details Screen, select the List Processing Screen created at the beginning of this topic.
  - For Title, add a title. If left blank, 'Title' is displayed on the tab. In the example above, the title is 'Actions and Reports.'

- Click the Add button.
  - Click the 'go to parent' link.
4. Click the 'Save' and then the 'Close' buttons.
  5. Follow the steps above for **Map the Object Type to the Screen** to ensure this is the screen displayed for the list object types.

# Creating Lists

To create a new list in STEP, users create a list entity and then to add records to the new list, a user uploads and imports a file of records for the list entity. The Create List action button can create a list entity and import a file with records in a single operation. Additionally, users can create only the list entity and then later upload and import the records when the records file is available.

**Important:** Records are stored in isolation, which means the functionality is limited for list records. List records cannot be searched for and cannot be displayed as regular entities in either Workbench or Web UI. For more information, see the **Configuring List Processing in Workbench** topic in this documentation.

Creating a list is the process of either:

- Importing formatted data as a list object type where the data is created as list entity object types for processing.
- Creating the list without importing a data file where the 'Create List' action button dialog only requires the ID and Name to be populated.

## Create List

\* Type  Customer List

ID

Name

Upload File

Import Configuration

The importing procedure is managed by a background process (BGP) and the BGP statuses allow the users to follow the progress of the import process, including waiting and running states. Errors and warnings can occur during import of records from a file and the importing BGP can therefore complete in any of the following states for

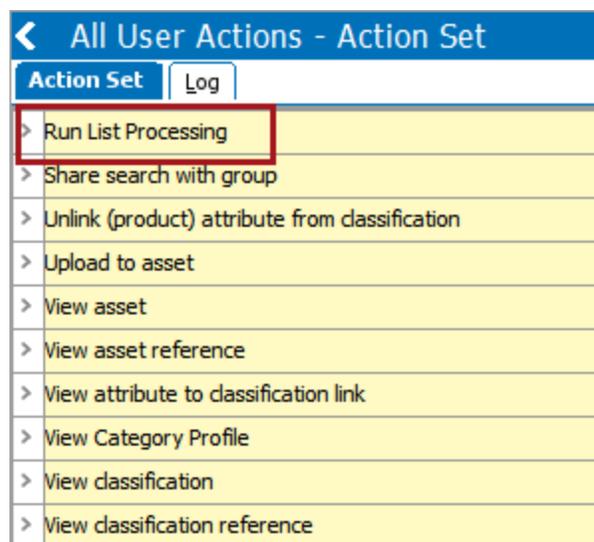
the following reasons. For more information, see the **Background Processes and Queues** topic in the **System Setup / Super User Guide** documentation.

After creating a list, continue by processing the list as defined in the **Processing Lists** topic.

## Prerequisites

This topic assumes that users have already created the required workbench configurations, Web UI screens, actions, and object types required for list processing. For more information on the required setup for processing lists, see the **List Processing** topic in this documentation.

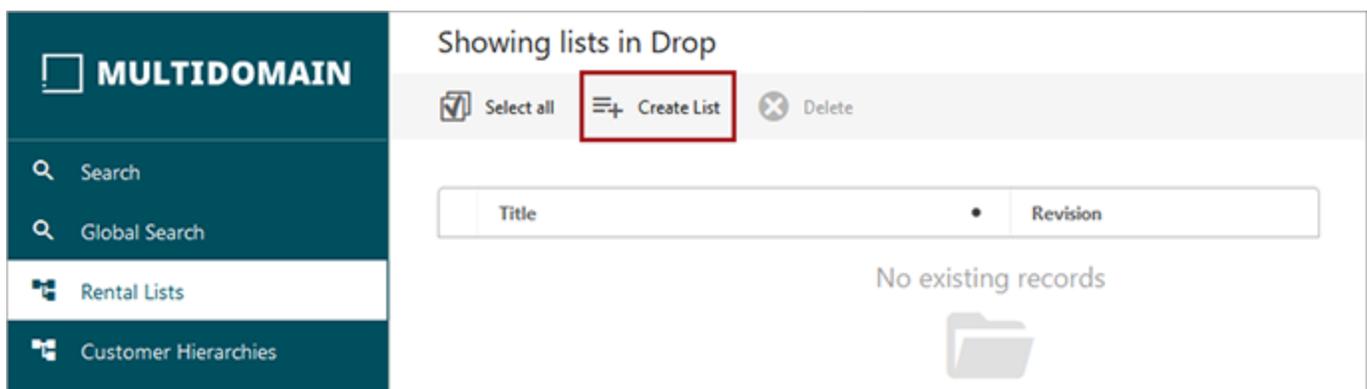
To execute list processing, users must be part of a user group with the 'Run List Processing' user action. For information on adding user actions, see the **Maintaining Action** topic in the **System Setup / Super User Guide** documentation.



## Create List Entities by Importing a File

Use the following steps to import a list and create list entity objects.

1. On the Web UI screen, from a valid parent node of a list object type, select the 'Create List' option.



2. On the Create List dialog, provide the following information:

### Create List

\* Type  Customer List

\* ID

Name

Upload File   

\* Import Configuration

- For the **Type** parameter, select the desired object type. All valid list object types as set in the component model are shown. If more than five list object types exist, the parameter is displayed as a dropdown.
- For the **ID** and **Name** parameters, add data to identify and reference the list.
- For the **Upload File** parameter, optionally select data files for importing.
- For the **Import Configuration** parameter, when uploading a file, select a pre-configured import configuration that can be used to the data model of the entity records in the list. Users can import lists in any of the file formats supported by the STEP importer. For more information, see the **Import Manager** topic in the **Data Exchange** documentation.

**Important:** An import configuration contains many elements and parameters that can be configured. On the following import configuration wizard, only these elements are relevant for list entities:

- **Map Data:** ID, Name, Attribute, Entity Reference, Reference Meta-Data, Object Type, Variable, Multivalued Variable and Data Containers.
- **Identify Destination:** Default Parent, an instance of a list must be selected to be able to select Default Object Type, Default Object Type.
- **Advanced Setting:** Match Units By.

3. Click the **Create** button to show the 'Upload' dialog for the duration of the list upload process.
4. When upload is complete, the dedicated **List Processing Screen** displays relevant information about the newly created list.

- If a file was uploaded, two process cards are displayed: one for the completed upload process and one for the ongoing import process. Both include start and stop timestamps and the user ID.

**CL-120414** Customer List • ID: CL-120414  
Created: 10/05/2020, 5:41:26 PM

 Process list ▼
  Import list
  Export list

### Process Reports

 **Import** 75% Complete

Started	10/05/2020, 5:41:29 PM	<a href="#">Details</a>
Finished	Running...	
User	USERE	

 **Upload** Complete

Started	10/05/2020, 5:41:27 PM
Finished	10/05/2020, 5:41:27 PM
User	USERE

5. Click the 'Details' link (shown in the image above) to review BGP details for importing of the uploaded file including any errors and warnings. In the first image below, the BGP is in progress while in the second image the BGP is finished.

### Details of the background process

Started By	USERE
ID	BGP_120415
Template ID	ListImporter
Status	<div style="width: 75%; background-color: #4CAF50; height: 15px; display: inline-block;"></div> 75%
Started	10/5/20 5:41:29 PM
Elapsed	6 s
Finished	-

 Export

ID	Type	Text
10	Info	Importing using import configuration with ID: 405713
20	Info	Retrieval started (Mon Oct 05 17:41:29 EDT 2020)
30	Info	Retrieved 185106 bytes (Mon Oct 05 17:41:29 EDT 2020)
50	Info	Conversion started (Mon Oct 05 17:41:29 EDT 2020)
80	Info	Logged on
90	Info	Mapping started (Mon Oct 05 17:41:29 EDT 2020)
100	Info	Mapping completed (Mon Oct 05 17:41:30 EDT 2020)

## Background Process

Started By: USERE  
 ID: BGP\_120415  
 Template ID: ListImporter  
 Status: ✓ Succeeded  
 Started: 11/16/20 10:59:20 PM  
 Elapsed: 5 s  
 Finished: 11/16/20 10:59:21 PM

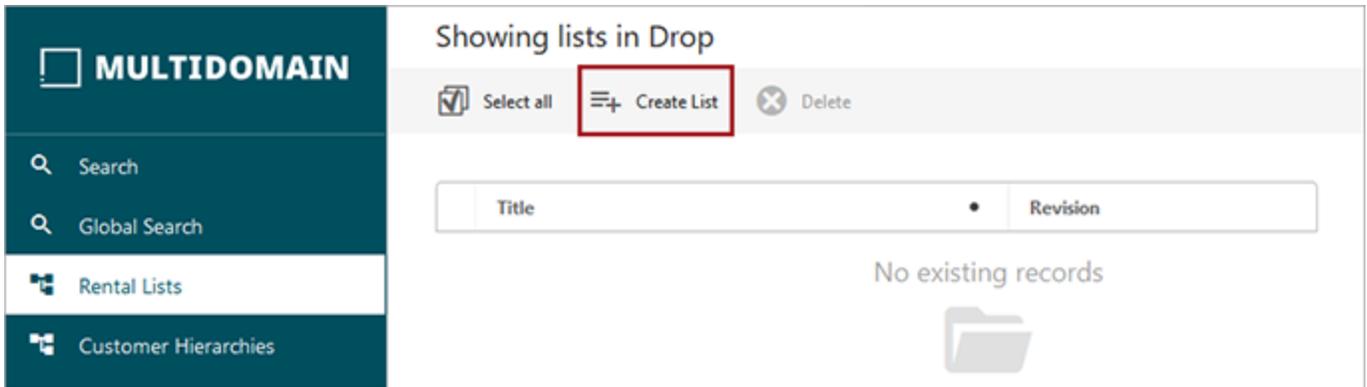
 Export

ID	Type	Text
10	Info	Importing using import configuration with ID: 106918
20	Info	Retrieval started (Mon Nov 16 22:59:20 CET 2020)
30	Info	Retrieved 783 bytes (Mon Nov 16 22:59:20 CET 2020)
50	Info	Conversion started (Mon Nov 16 22:59:20 CET 2020)
60	Info	Converted 26 objects (Mon Nov 16 22:59:20 CET 2020)
80	Info	Logged on
90	Info	Mapping started (Mon Nov 16 22:59:20 CET 2020)
100	Info	Mapping completed (Mon Nov 16 22:59:20 CET 2020)
120	Info	Setting new parallel degrees to 2 concurrent workers.
290	Info	TopFinding collector started (Mon Nov 16 22:59:21 CET 2020)
300	Info	Start topfinding algorithms execution (Mon Nov 16 22:59:21 CET 2020)
310	Info	Collector com.stibo.datacollector.impl.AttributeDataProfileCollector has empty dc per object type profile

## Create List Entities Without Importing a File

Creating a list without importing a file creates the entities of a list, allowing the user to import their list data later.

1. On the Web UI screen, from a valid parent node of a list processing object type, click the 'Create List' button.



2. On the Create List dialog:

- Add a Name
- Do not select an Upload File or Import Configuration.
- Click the Create button.

### Create List

\* Type  Customer List

ID

Name

Upload File

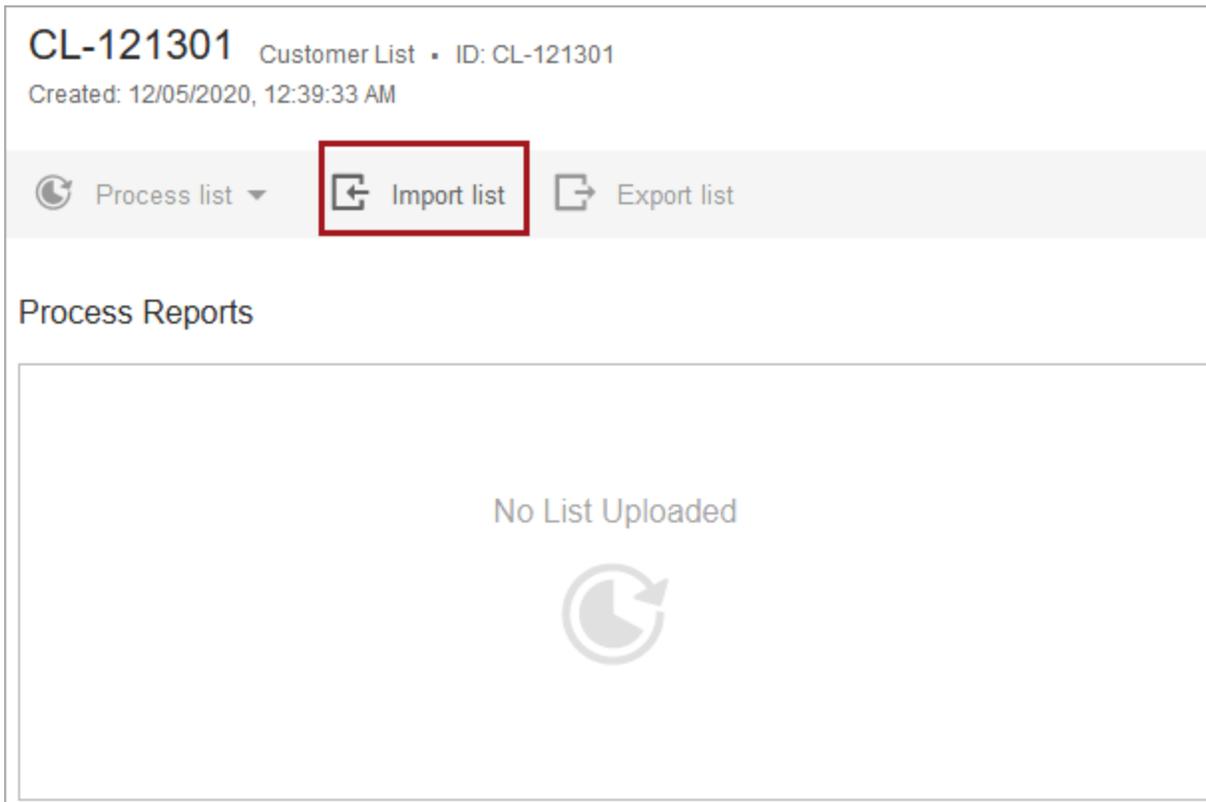
Import Configuration

The empty customer list displays in the configured Web UI screen.

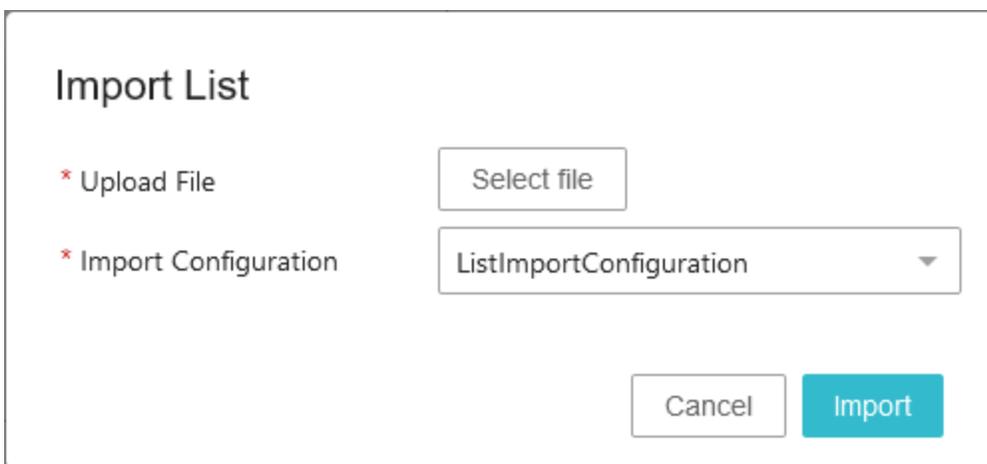
## Import a File Saved Locally

When the list object has already been created, a file of records saved on your own network can be added to the list.

1. Open the list object.
2. Select the 'Import list' button to display the 'Import List' dialog.



3. Select a local import file and a compatible import configuration.



4. Click the **Import** button to import the list and allow process operations to be run.

## Import BGP Statuses

An import BGP will have one of the following statuses:

- Complete

All records were imported without any errors or warnings occurring.

✓ Import		Complete
Started	2019-03-29 14:10:18	<a href="#">Details</a>
Finished	2019-03-29 14:15:24	
User	SHMO	
Imported records	194,256	

- Complete with Errors

Entire records could not be imported based on information the import file. This could be due to invalid object type.

Records were imported, but error-prone values from attributes, references, or data containers were not imported. Details of both warnings and errors can be reviewed in the importing BGP log.

Records with errors can be downloaded in a file for review.

! Import		Completed with Errors
Started	2019-03-29 14:10:18	<a href="#">Details</a>
Finished	2019-03-29 14:15:24	
User	SHMO	
Total errors	2,197	
Total warnings	44,515	
Imported records	178,756	
Records with error	15,500 <a href="#">↓</a>	

- Failed

The importing BGP fails to complete the importing process due to severe errors occurring above the records processing level. When the Import status is failed, no data is imported.

! Import		Failed
Started	2019-03-29 14:10:18	<a href="#">Details</a>
Finished	2019-03-29 14:15:24	
User	SHMO	
Total errors	2,197	
Total warnings	44,515	
Imported records	0	

- Aborted

A user chose to abort the importing BGP in Workbench. When the import is Aborted, no data is imported

 <b>Import</b>		<b>Aborted</b>
Started	2019-03-29 14:10:18	<a href="#">Details</a>
Finished	2019-03-29 14:15:24	
User	SHMO	
Imported records	0	

# Processing Lists

After importing a list (defined in the **Creating Lists** topic), users can:

- Review information about the current list via the **Entity Summary Card**.
- Assess the data quality of the list via the **Profile Findings** link.
- Initiate processing of the list process internally by selecting a list processing configuration from the **Process List** dropdown. List Processing Configurations are created during the workbench setup, as defined in the **Configuring List Processing in Workbench** topic.

**CL-120426** Customer List • ID: CL-120426  
26 records • Created: 11/16/2020, 11:49:51 PM

 **Profile Findings**

 Process list ▼

 Import list

 Export list

### Process Reports

<span style="color: green; font-weight: bold;">✓</span> Import	Complete
<p>Started 11/16/2020, 11:49:54 PM</p> <p>Finished 11/16/2020, 11:49:54 PM</p> <p>User USERE</p> <p>Imported records 26</p>	<a href="#" style="color: blue; text-decoration: none;">Details</a>
<span style="color: green; font-weight: bold;">✓</span> Upload	Complete
<p>Started 11/16/2020, 11:49:51 PM</p> <p>Finished 11/16/2020, 11:49:51 PM</p> <p>User USERE</p>	

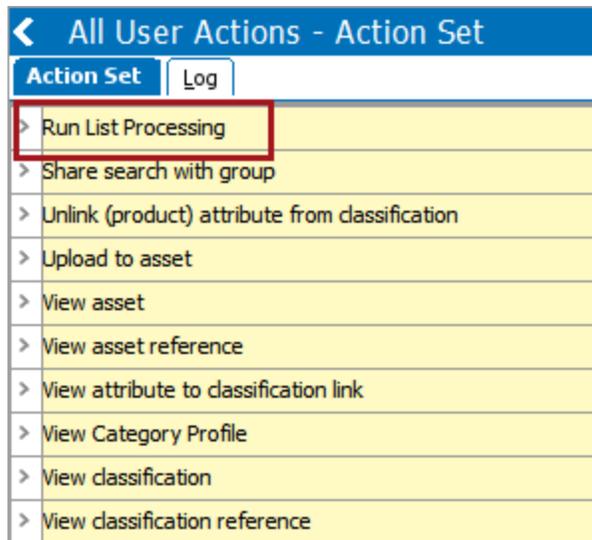
See the **Processing Example** section below for an explanation of each step of this functionality.

After processing a list, continue by exporting the list as defined in the **Exporting a Processed List** topic.

## Prerequisites

This topic assumes that users have already created the object types required for list processing, performed the required workbench configurations, and Web UI screen setup. For more information on the required setup for processing lists, see the **List Processing** topic in this documentation.

To execute list processing, users must be part of a user group with the 'Run List Processing' user action. For information on adding user actions, see the **Maintaining Action Sets** topic in the **System Setup / Super User Guide** documentation.



## Entity Summary Card

In the sample list processing screen shown above, the Entity Summary Card is displayed at the top of the screen and shows basic information about the list:

- Name of list
- Type of list
- ID of list
- Current number of records in the list (will likely decrease when processing list with filtering and deduplication)
- Time of list creation

For more information, see the **Below Title Entity Summary Card** topic in the **Web User Interfaces / Web UI Getting Started** documentation.

## Profile Findings

The 'Profile Findings' button displays a configured data profile screen. As a list is imported or processed, a new data profile is generated based on the default profile configuration setting on the object type of the list.

In this screen users can scrutinize the quality of the data in the list immediately after import. For more information, see the **Data Profiling in Web UI** topic and **Profile Configuration** topic in the **Data Profiling** documentation.

← Marketing Preps for Shoes Profile
More info Refresh profile

Object Type Filter

**All Items 41,218**

Customer Record 41,218

Attributes

All Attributes

- Birth Date
- First Name
- Gender
- Last Name**
- ▶ Main Address
- Phone Number
- Primary Email Address

### Last Name

ID: LastName

Summary

✓ Valid on all of 41,218 filtered items

Validation base type: text

Valid for:

- Customer Contact
- Household
- Individual Customer
- Customer Record
- LeadTestRecord

Value Characteristics

Has value	41,176
Has no value	42

Different values	18,782
Unique values	13,880

Content Analysis

Characters used

#	&	-	/	0	1	2	3	4	5	6		
7	8	9	:	;	?	@	A	B	C	D	E	F
G	H	I	J	K	L	M	N	O	P	Q	R	S
T	U	V	W	X	Y	Z	\	_	a	b	c	d
e	f	g	h	i	j	k	l	m	n	o	p	q
r	s	t	u	v	w	x	y	z				

<b>28</b>
Max. length
<b>1</b>
Min. length
<b>6.5</b>
Avg. length

Top Findings

42 items have no value

Pattern Analysis

AAAAAA	9,878
AAAAA	8,516
AAAAAAA	7,930
AAAAAAAA	4,994
AAAA	3,720

More frequent patterns

#AAAA?	1
& AAAAAAAAA AAAA	1
9/9/9999 9.99	1
99.99.99.999	1
99.99.999.99	1

Value Analysis

Smith	447
Williams	287
Johnson	282
Jones	272
Brown	248

More frequent values

gerber	1
ganesin	1
gibson	1
gilbert	1
gilkey	1

## Process List

The 'Process list' dropdown displays all list processing configurations that are valid for the object type of the list. For more information, see the **Configuring List Processing in Workbench** topic in this documentation.

Processing a list is managed by a background process (BGP). Errors and warnings can occur during processing of the list and the list processing BGP can therefore complete in any of the following states for the following reasons.

### Processing BGP Statuses

**Note:** Some operations are executed in parallel to optimize performance, but all operations are applied in the configured order per record. Use the following case-sensitive sharedconfig.properties file parameter to set the number of parallel processes that can execute list processing (e.g., 20):

```
BackgroundProcess.Queue.LIST_PROCESSING_QUEUE.Parallel=20
```

- Complete

All records were processed without any errors.

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✓ Export		Complete
Started	12/01/2020, 9:36:56 AM	<a href="#">Details</a>
Finished	12/01/2020, 9:36:57 AM	
User	USERE	
Exported records	41,218 	

- Complete with Errors

One or more records failed while attempting to process it by one or more list operations. When an operation fails on a record, any update that operation performed on that record will not take effect. However, updates to that record and the results of other successful operations will still take effect, regardless if such other operations occur prior or after the failing operation.

Click the 'Details' link to review both warnings and errors in the importing BGP log.

 True Prospect DeDuplication	Completed with Errors	
Started	11/27/2020, 9:51:53 PM	<a href="#">Details</a>
Finished	11/27/2020, 9:53:59 PM	
User	USERE	
Total errors	1,626	
Total warnings	21	
Total records processed	9,999	
<b>Operation</b>		<b>Records Affected</b>
✓ 1. Deduplication by 'RemoveMissingAddressMA'		-313

- Failed

The BGP fails to complete the list processing due to severe errors occurring above records processing level. When the BGP is Failed, no data is updated.

 True Prospects DeDuplication
Failed

Started	11/27/2020, 9:25:36 PM	<a href="#">Details</a>
Finished	11/27/2020, 9:26:01 PM	
User	USERE	
Total errors	2	

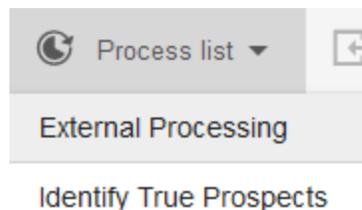
Operation	Records Affected
 1. Filter by 'CityPresent'	...
 2. Filter by 'LastnameValid'	...
 3. Set single value [Gender]	...
 4. Deduplication by 'LP MA 1 - complex'	...

- Aborted

A user chose to cancel the BGP in Workbench. When the BGP is Aborted, no data is updated.

# Processing Example

For this example, selecting the 'Identify True Prospects' configuration on the imported record list displays a summary of all the list operations that will be applied to the list and the order they will be applied when clicking the 'Start' button.



**Note:** While some operations are executed in parallel to optimize performance, each operation is applied in the configured order per record.

### Identify True Prospects Confirmation

This list processing configuration will execute the following list operations:

1. Filter by 'CityPresent'
2. Filter by 'LastnameValid'
3. Set single value [Gender]
4. Deduplication by 'LP-MA-Name'

Running this list processing configuration will perform the following actions in this order:

- Removes all records that return the value of 'false' for the business condition 'CityPresent.'
- Removes all records with malformed or absent last name.

- Updates gender attribute values using a bulk update operation.
- Deduplicates the full list based on a preconfigured matching algorithm named 'LP-MA-Name.'

Selecting the 'Start' button begins the process and a new process card titled 'Identify True Prospects' is presented with the progress of the list processing.

### Process Reports

 Identify True Prospects
65% Complete

---

Started	11/17/2020, 12:19:10 AM	<a href="#">Details</a>
Finished	Running...	
User	USERE	

Operation	Records Affected
 1. Filter by 'CityPresent'	...
 2. Filter by 'LastnameValid'	...
 3. Set single value [Gender]	...
 4. Deduplication by 'LP-MA-Name'	...

 Import
Complete

---

Started	11/16/2020, 11:49:54 PM	<a href="#">Details</a>
Finished	11/16/2020, 11:49:54 PM	

**Note:** While only one list processing background process can operate on a list at any time, users can process many lists simultaneously. If the displayed background process is deleted, the process card will disappear from the Web UI screen. However, despite the BGP and the card being deleted, the contents of the list remain in the system.

Each operation shows the number of records that were affected by the operation. Negative values are used for filtering and deduplication operations and indicate the number of records that were removed from the list.

In the image below, the list of 26 records has been processed as follows:

- Operation 1 removes 5 records as they were missing city values.
- Operation 2 removes 3 records when finding an invalid value for the last name.

- Operation 3 sets the gender attribute value for the remaining 18 records.
- Operation 4 removes 6 records after running the matching algorithm and considering records with the same last name as duplicates.
- The list has been reduced to 12 records, which is updated in the Summary Card.

## CL-120414

Customer List • ID: CL-120414

12 records • Created: 11/16/2020, 10:59:15 PM

### Profile Findings

Process list ▾
 Import list
 Export list

### Process Reports

✓ Identify True Prospects
Complete

Started 11/16/2020, 11:00:40 PM [Details](#)

Finished 11/16/2020, 11:00:41 PM

User USERE

Total records processed 26

Operation	Records Affected
✓ 1. Filter by 'CityPresent'	-5
✓ 2. Filter by 'LastnameValid'	-3
✓ 3. Set single value [Gender]	18
✓ 4. Deduplication by 'LP-MA-Name'	-6

✓ Import
Complete

Started 11/16/2020, 10:59:20 PM [Details](#)

Finished 11/16/2020, 10:59:21 PM

User USERE

If records are removed by filter operations, click the download icon ( ) on an operation row to view a list of the removed records.

Total records processed 26

Operation	Records Affected
✓ 1. Filter by 'CityPresent'	-5 
✓ 2. Filter by 'LastnameValid'	-3 
✓ 3. Set single value [Gender]	18

# Exporting a Processed List

Once the desired data quality operations are performed on the imported list, users can export the list in order to share the modified list with downstream teams or applications.

**Important:** The list export feature leverages the STEP Exporter and a saved Export Configuration. In the export configuration wizard steps, only the mentioned elements are relevant for exporting list entities:

- Selected Objects: Export = Entity
- Advanced: Resolve Inline References and Include Calculated Attribute Values
- Selected Delivery Method: None. These selections are ignored for Lists

To export a processed list:

1. From the list processing screen, click the **Export list** button to display the 'Export List' dialog.

**CL-120414** Customer List • ID: CL-120414  
12 records • Created: 11/16/2020, 10:59:15 PM

**Profile Findings**

Process list ▼
 Import list
 Export list

### Process Reports

✓ **Identify True Prospects**
Complete

Started 11/16/2020, 11:00:40 PM [Details](#)

Finished 11/16/2020, 11:00:41 PM

User USERE

Total records processed 26

Operation	Records Affected
✓ 1. Filter by 'CityPresent'	-5
✓ 2. Filter by 'LastnameValid'	-3
✓ 3. Set single value [Gender]	18
✓ 4. Deduplication by 'LP-MA-Name'	-6

2. Select an export configuration that is compatible with the type of the processed list and display an Export process card on the list processing screen. Users can export lists in any of the file formats supported by the STEP exporter.

### Export List

\* Export Configuration

CustomerExporter

CSV Export Config

List Processing Export Config

3. When the export process shows a status of Complete, click the download icon (  ) to download a copy of the processed records list. Exporting list is handled by a BGP and process details can be seen in the BGP log including any errors and warnings that occurred.

**CL-120414** Customer List • ID: CL-120414  
12 records • Created: 11/16/2020, 10:59:15 PM



Process list ▾ Import list Export list

Process Reports

✓ **Export** Complete

Started 11/16/2020, 11:08:11 PM [Details](#)

Finished 11/16/2020, 11:08:11 PM

User USERE

Exported records **12**

✓ **Filter, update and dedup list** Complete

Started 11/16/2020, 11:00:40 PM [Details](#)

Finished 11/16/2020, 11:00:41 PM

User USERE

Total records processed 26

Operation	Records Affected
✓ 1. Filter by 'CityPresent'	-5
✓ 2. Filter by 'LastnameValid'	-3
✓ 3. Set single value [Gender]	18
✓ 4. Deduplication by 'LP-MA-Name'	-6