



TIBCO EBX® Match and Merge Add-on Release Notes

*Version 6.2.1
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New features

This release contains the following enhancements:

- The **Merge** screen now supports display of custom views for tables and Business objects. This feature had previously been implemented for only the **Manage group** screen, but is now available for both screens.
- The first time users access the **Manage group** and **Merge** screens, they now display as they are configured in EBX®. If multiple views are configured for a user, they are prioritized as follows: favorite view, recommended view, then default view. Any changes users make to the view, or record orientation (vertical or horizontal) are maintained and displayed the next time users log in.
- Administrators can now specify a default view mode (horizontal or vertical) when configuring matching tables.
- The **Manage group** view now includes filter options. You can enable pre-defined filters that hide any merged records from the view, or hide all fields except those configured to participate in matching operations.
- The display of the add-on's services now reflects the permissions set on the dataset. If a service is hidden for a user on a dataset, it no longer displays as an option in the add-on's screens.
- Updates were made to improve performance when the add-on creates or modifies records.
- It is now possible to configure computed value fields to participate in matching operations.

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

The Spring framework was updated to version 6.1.15.

Closed Issues

This release contains the following closed issues:

- **[MAME-9235]** When using staging to import matching policies and a search strategy does not exist in the target environment, the message should not include all the additional information related to the matching policy.
- **[MAME-9236]** The content of warning messages should be improved when using staging to import configuration options.
- **[MAME-9360]** The **Search before create** screen takes a long time to load when a decision tree has many field types.
- **[MAME-9368]** The survivor field value is not correct when there are multiple records that satisfy the merge function conditions.
- **[MAME-9589]** When performing a manual merge and fields have read-only permission, the survivor rules should be applied.
- **[MAME-9625]** When performing a manual merge on Business objects and fields have read-only permission, the survivor rules should be applied.
- **[MAME-9693]** The **Merge** button still displays after merging records and when a manual merge is no longer required.
- **[MAME-9705]** The loading screen gets stuck when trying to open a preview on the **Merge** screen.

Known Issues

This release contains the following known issues:

- **[MAME-9819]** Inline matching is triggered after modifying a field that is not configured to participate in matching operations and not a computed field.
- **[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).

