Duplicate Resolution

Your chemical catalog is bound to have duplicates in it. Maybe somebody didn't look to see if a (M)SDS already existed in your catalog before they submitted a copy. Maybe a version existed and a new version was added as a new chemical rather than added as a new revision. Whatever the method, you may want to consolidate these records so that you are billed for less active records.

This document will walk you through how to find the SafeTec identified duplicate list and clean up the duplicate records identified on it. Once you have approved the records as duplicates, the system will consolidate information and archive one of the records. This document will also talk specifically about what happens to the records and data upon your approval.

WARNING! Please note that once you have agreed that a record is a duplicate and the consolidation process happens, it is impossible to revert the chemical records back to the way they were before the consolidation due to the two records sharing data. There are processes we can do to make it look like the records have been split, but the information they shared will remain with both documents.

SafeTec Identified Duplicate List

The SafeTec system automatically checks for duplicates and new revision records in your system and identifies them using the following criteria.

Relationship Filter

The documents are first compared for the same product name, manufacturer name, product number, language, and region. If these all match, we identify the documents as being an exact match and are identified as an *Exact Relationship*.

If the documents are nearly an exact match except for product number, or if the match was identified by a user using the Identify Duplicates tool, we identify the documents as being a similar match and are identified as a *Similar Relationship*.

You can filter by *Exact Relationship* or *Similar Relationship* using the *Relationship Filter* in the **View Duplicate Documents**. The default search will look for *Exact Relationships*, which should be auto resolved by SafeTec every night. Please contact customerservice@safetec.net if this is not the case.

Relationship Type

Once SafeTec establishes a **Relationship Filter** for a pair of documents, we then compare the revision date to determine the **Relationship Type.** Those paired documents that have the same revision date are identified as *Unresolved Duplicates.* Documents with different revision dates are identified as *Unresolved Older Version Of.*
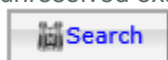
Access the SafeTec Identified Duplicate List

1. From the Main Menu, click on the **View Duplicate** button.

     View Duplicates

2. The **View Duplicate Documents** window will open to a search page. If you just want to see all the unresolved exact duplicates SafeTec has identified in the system, click the **Search** button.

     Search

3. In the **Pending Document Relationships** list that opens, you can see documents that SafeTec believes is either an *Unresolved Exact Duplicate* or an *Unresolved Exact Older Version Of*. It displays both products that SafeTec is comparing, their revision date, SDS Number, and the possible Relationship Type.

Pending Document Relationships

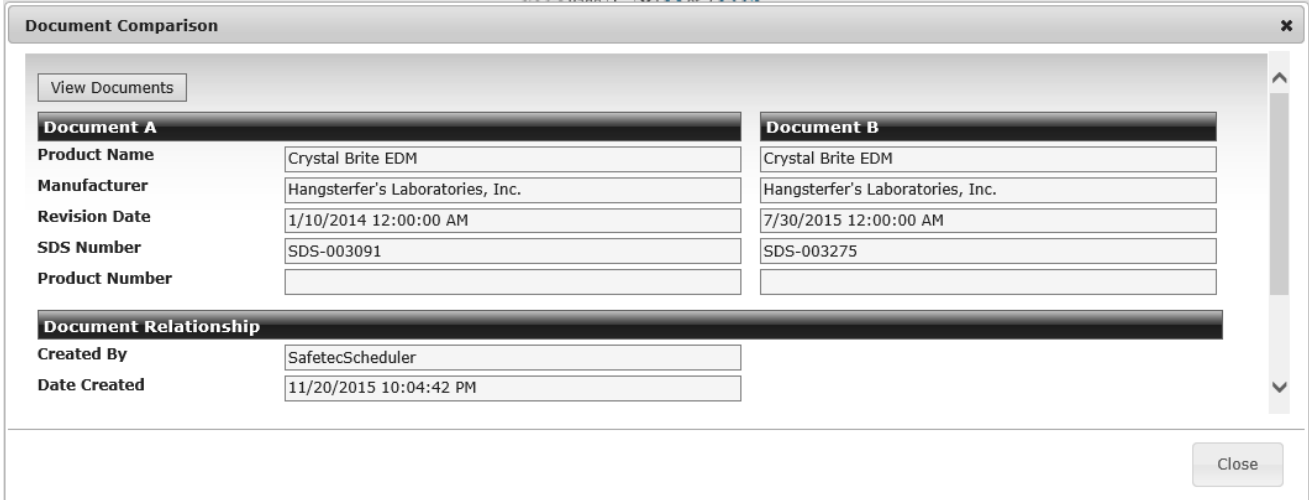| SDS	Product A	Rev Date A	SDS Number	Relationship Type	SDS	Product B	Rev Date B	SDS Number	Relationships		
	ANHYDROUS CALCIUM CHLORIDE 94 - 97% MINI-PELLETS	7/13/2009	SDS-003442	Unresolved Exact Duplicate Of		ANHYDROUS CALCIUM CHLORIDE 94 - 97% MINI-PELLETS	7/13/2009	SDS-003388	Compare	Ignore	Resolve
	BONDERITE M-CR 1200S RTU AERO known as ALODINE 1200S RTU BRUSH	4/3/2015	SDS-003608	Unresolved Exact Duplicate Of		BONDERITE M-CR 1200S RTU AERO known as ALODINE 1200S RTU BRUSH	4/3/2015	SDS-003607	Compare	Ignore	Resolve
	Copper/Copper Alloys	1/2/2006	SDS-000146	Unresolved Exact Older Version Of		Copper/Copper Alloys	12/15/2014	SDS-003590	Compare	Ignore	Resolve
	Crystal Brite EDM	1/10/2014	SDS-003091	Unresolved Exact Older Version Of		Crystal Brite EDM	7/30/2015	SDS-003275	Compare	Ignore	Resolve

Export to Excel   Ignore Selected   Resolve Selected

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a. **Note:** The default search is to look for documents with a **Relationship Filter** of *Exact Relationship.* However, the search results can be filtered using the **Relationship Filter** and the **Relationship Type** in the search criteria.

Viewing and Comparing Identified Duplicates

There are three main ways to compare information about the duplicates that have been identified.
1. View Duplicate Records
2. View ToolTips
3. Compare button

View Duplicate Records

Clicking on the blue product name link should open the product in a new tab in your web browser. To open the other document, you will have to switch back to the web browser tab with the **Pending Document Relationships** and click the other document link.

View ToolTips

Hovering your mouse over the blue icon will display the product number of that chemical near your mouse.

Compare Button

On the **Pending Document Relationships** results, click the **Compare** button.

This will open up a pop up window with the product name, manufacturer, revision date, SDS number, and product number in a side by side view for comparing. It also displays who identified the relationship between the two documents and when.

In the upper right hand corner of this pop up window, there is a **View Documents** button. Clicking on this button will open up both records in new web browser tabs.

When you are done reviewing the information in the **Document Comparison** window, you can click the **Close** button.

Performing a Duplicate Consolidation

From the **Pending Document Relationship** list, there are two main ways to resolve or ignore a SafeTec identified duplicate:

1. One pair at a time
2. In bulk

Ignoring a possible duplicate will move the pair to an ignored list. This marks them as reviewed, and removes them from needing your attention. If you later decide that you do indeed wish to approve the documents as ignored, it is possible to move them back to Pending and then become resolved.

WARNING! Please note that once you have agreed that a record is a duplicate and the consolidation process happens, it is impossible to revert the chemical records back to the way they were before the consolidation due to the two records sharing data. There are processes we can do to make it look like the records have been split, but the information they shared will remain with both documents.

Resolve or Ignore One SafeTec Identified Duplicate at a Time

1. In the **Pending Document Relationship** list, you can review by the records by:
   a. Clicking on the red MSDS icon to view the documents.
   b. Clicking on the blue product name to open the SDS Detail window

2. If you have determined you want to ignore the documents SafeTec identified as a possible duplicate, click the **Ignore** button for those records.

   a. The screen will refresh with the pair removed and the screen will display that they have been ignored.

   b. You can search for Ignored records and allow them to be reviewed again at a later time.

3. If you have determined you want to approve a possible duplicate, click the **Resolve** button for those records.

   a. The screen will refresh with the pair removed and the screen will display that they have been resolved.

   b. **WARNING!** Please note that once you have agreed that a record is a duplicate and the consolidation process happens, it is impossible to revert the chemical records back to the way they were before the consolidation due to the two records sharing data. There are processes we can do to make it look like the records have been split, but the information they shared will remain with both documents.

Resolve or Ignore Many SafeTec Identified Duplicates at a Time

1. In the **Pending Document Relationship** list, you can review by the records by:
   a. Clicking on the red MSDS icon to view the documents.
   b. Clicking on the blue product name to open the SDS Detail window

2. If you have determined which pairs you want to ignore the documents SafeTec identified as a possible duplicates, click the boxes beside their names and then click the **Ignore Selected** button.

   a. The screen will refresh with the pair removed and the screen will display that they have been ignored.

   b. You can search for Ignored records and allow them to be reviewed again at a later time.

3. If you have determined you want to approve a possible duplicate, click the **Resolve** button for those records.

a. The screen will refresh with the pair removed and the screen will display that they have been resolved.

b. **WARNING!** Please note that once you have agreed that a record is a duplicate and the consolidation process happens, it is impossible to revert the chemical records back to the way they were before the consolidation due to the two records sharing data. There are processes we can do to make it look like the records have been split, but the information they shared will remain with both documents.

View Resolved or Ignored Duplicates

Once you have resolved or ignored duplicates, you can review the list of resolved or ignored duplicates.

Review Ignored Duplicates and Resurrect

Ignoring a possible duplicate will move the records to an Ignored list. This marks them as being previously reviewed by you, and removes them from the Pending list as they no longer need your attention. If you later decide that you do indeed wish to approve the documents as ignored, it is possible to move them back to Pending and then become resolved.
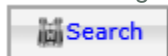
1. From the Main Menu, click on the **View Duplicate** button.

2. The **View Duplicate Document** window will open. Click on the **Ignored** tab.

3. To find all ignored possible duplicate identified documents, click the **Search** button.

4. In the **Ignored Document Relationships** list, you can resurrect records and return them to the **Pending** list to be reviewed again. There are two methods to do this:

a. Click the **Resurrect** button for the pair of records you wish to review again.
b. Place a check box next to all the chemicals you wish to resurrect, and click the **Resurrect Selected** button.

5. The screen will refresh with the record(s) removed and display a message.

Review Resolved Duplicates

Unlike the Ignore process, a resolved duplicate is impossible to revert the chemical records back to the Pending list to be reviewed again and ignored. This is because data is shared between the two records, and it is impossible to know who had what data originally.

1. From the Main Menu, click on the **View Duplicate** button.

2. The **View Duplicate Documents** window will open. Click on the **Resolved** tab.

3. To find all resolved possible duplicate identified documents, click the **Search** button.

4. The **Resolved Document Relationship** list will display all documents that have been resolved. Documents that were Resolved By Safetec Web were documents approved online by an Admin user, while documents that were Resolved By Safetec Admin were approved by SafeTec for you.

Auto Resolve

To assist you with managing duplicates in your system, SafeTec has configured your account to automatically resolve any duplicate pairs we have flagged as an *Exact Relationship*, duplicates and revisions. This reduces the number of duplicates for you to manage to just those duplicate pairs that we have flagged as *Similar Relationship* (product number does not match) and documents that other users have identified with the Identify Duplicates tool.

If you are dissatisfied with having your exact duplicates automatically resolved by SafeTec with the process we have outlined, please contact us at customerservice@safetec.net, and we would be happy to turn the auto resolve feature off.

What Happens When Duplicates Are Consolidated?

When you agree that two records are a duplicate, the system first looks at which record is going to be the surviving record and which record is going to be archived. Most of the time, this is determined by the revision date of the (M)SDSs, where the document with the newer revision date is the surviving record. If both records have the same revision date, the record that has been in our system longer will remain.

From there, the system then copies some data from the document with the older revision date that is going to be archived and adds the data to the surviving record. This information includes:

- Inventory information if there is any
- Attachments
- Custom field data available to you for editing
- Facility assignments
- Receipt Inventory data if there is any
- Synonyms
- Common Names
- Manufacture Codes
- Date created and by whom
- Chemical approval types
- **WARNING!** Please note that once you have agreed that a record is a duplicate and the consolidation process happens, it is impossible to revert the chemical records back to the way they were before the consolidation due to the two records sharing data. There are processes we can do to make it look like the records have been split, but the information they shared will remain with both documents.

Information that remains with the document that is going to be archived and will not be copied includes:

- Product Name
- Manufacture and Manufacture Division
- Revision Date
- Ingredients or Ingredient Override
- HMIS/NFPA/GHS/WHMIS information
- Flash Point
- Chemical State
- Chemical Type
- Specific Gravity
- Attributes
- Date the chemical was archived at a facility