# Transcript - Match Report Training Video

Welcome to the Public Libraries Survey Web Portal Training Video. Today’s video shows how to run Match Report and how to address potential issues found between prior year and current year data.

So what does the Match Report do? The Match Report compares current year data to prior year data. It also makes sure that data entered meets the status structure rules and requirements. For each issue found in the Match Report, you will need to modify the data and correct the errors until a successful Match Report has been run.

Only once you have successfully saved your state characteristics, and imported or entered your AE and Outlet data, can you run a Match Report. Once you are able to run a Match Report, your survey status will say that you have all data types and that your next step is to run a Match Report.

To run your Match Report, got to Reports 🡪 Run Match Report. Then click the “Download Match Report” button. Save the Match Report however you would like, and then once it is fully downloaded, you can open the Match Report.

Once your Match Report downloads, it will look something like this. The summary sheet has two tables. The Match Problems table shows a list of the match issues that were found, with the number of AEs and the number of outlets affected by each issue. The Worksheet table shows the number of match issues contained on each of the detail sheets. So you will find most match issues on the “Admin Single” or the “Outlet Single” tabs. It will give you a breakdown of the FSCSKEY and FSCS\_SEQ [sequence] numbers, the status structure and additional information, plus the match error message, which can be found in column I. It will do this for every tab; the same goes for “Admin Single.” The “Admin Multi” and “Outlet Multi” tabs are less commonly used. These worksheets will list all records associated by the LINKID in structure changes that involve more than one AE or Outlet. It is possible that you will receive multiple issues affecting the associated entities. You will need to resolve all issues found in this document before you can proceed to edit. Additionally, any name change errors will be found on the “Name Changes” tab, and address changes will be found on the “Address Changes” tab. You can also find copies of your restorable AEs and your restorable outlets in this file.

More detailed information about the Match Report can be found in the User’s Guide, Appendix C, or under the Web Portal Help menu 🡪 Resolving the Match Report.

These next two slides show the most common Match Report errors. The most common Match Report errors have to do with the FSCSKEY. The FSCSKEY is the identification code assigned by the PLS Web Portal to the Administrative Entity. The FSCS\_SEQ number is a unique three-digit suffix appended to the FSCSKEY to distinguish between each outlet. (FSCS stands for Federal State Cooperative System.)

There are many Match Report errors that you could run into. Here I have listed a few examples of those most frequently run into by SDCs:

* Sometimes a Match Report will tell you that an FSCSKEY must be -3 for various status structure records. To fix this issue, go to the library in question, meaning find the entity in your data file, and change the FSCSKEY to -3 [negative three].
* You can also sometimes receive this issue for FSCS\_SEQ number. The fix, again, is to go to the library in question and change the FSCS\_SEQ number to -3.
* Another common one is that a current record was found in the current year but not the prior year, or vice-versa. There are two options.
  + Fix 1: You have tried to assign FSCSKEYs and/or FSCS\_SEQ numbers to a new library; however new libraries should have -3s for FSCSKEY and FSCS\_SEQ numbers.
  + Fix 2: You may have accidentally set the FSCS\_SEQ number to -3 for a library that existed in the PY. To fix this error, change the FSCS\_SEQ number back to the original number.

Other common issues involve the PARENTID. The PARENTID is only applicable to outlets. This is the ID that links outlets to the correct parent AE. It is defined as the LIBID of the parent AE record and must be provided when outlets are added removed. The PARENTID must be -3 for various status structure changes. If you receive this error, go to the library in question and make sure the PARENTID is -3. Additionally, Administrative Entities can also receive the error that they do not have any outlets. If you receive this error, check the Outlet file for possible issues with PARENTID assignment.

Additional issues can be found on the “Name Changes” tab. The system is very, very picky when it comes to name changes or address changes. It will pick up on extra spaces, a change between uppercase and lower case, among other various changes.

Here is a summary of the match process. You must first enter your state characteristics. Once your state characteristics are entered, you may import your AE and Outlet data files. Once you’ve imported those data files, you will need to run a Match Report. You will need to open the Match Report and address any issues caught in the Match Report. You must then re-import your data files, run a new Match Report, and depending on whether or not your Match Report is passed, you may proceed to the edit report. Or if you do not pass match, you must go back, correct your data files again, re-import them and run a new Match Report, and continue repeating this process until match has been passed.

I will now show you how to fix one Match issue. So to correct this data issue, I will need to bring up the AE data file which I have over here on the right side of the screen. To correct the issue found, that the FSCSKEY needs to be -3 for the status structures (02, 03, 04, 05, 10, 13, 22, or 23). So as this is a status structure 04, my FSCSKEY must be -3. So this should correct and remove this one issue from our Match Report.

To confirm that the data has been fixed, we will need to save this file and then import it into the Web Portal. Once we have returned to the Web Portal, we’ll go to Tools 🡪 Import Data. We will then import the new data files, and because I have imported a new AE file, I must also import a new Outlet file. Both files have been successfully imported, so then we must then go back to Reports 🡪 Run Match Report. Open this new Match Report, and then we’ll go to the “Admin Single” tab to see if this issue has been removed. And as we can see there is no longer an “FSCSKEY must be -3” issue for the Mecklenburg County Library. But there is still one Mecklenburg County issue.

Once you have successfully passed match and corrected all issues found in your Match Report, your Match Report will look like this. On the summary page, you will see a message that says you have passed match successfully. If you opened new libraries with a 02 status structure or did any other status structure changes that required a new FSCSKEY or new FSCS\_SEQ number to be assigned, they will be on the New ID tab, and they will be listed as such.

Thank you for watching this Match Report Training Video. If you have additional issues, please contact the helpdesk or view the other training videos. Thank you.