Thomson Reuters CLEAR®

Batch Person Search

The Batch Request feature allows you to submit a large number of subjects to obtain results that match the input criteria for Person results quickly and efficiently.

**NOTE:** Steps and screenshots will be for the CLEAR user interface. The stand-alone Batchsite is very similar, and the steps below should be good guidance for running a Batch Person Search.

**BATCH PERSON SEARCH**

Click Batch and select Batch Search to run a batch query on person data. You must configure your Batch Preferences before you can submit a batch search request.

To get to Batch Preferences, follow these three easy steps:

1. Click on Account Tools in the menu bar.
2. Click on the My Preferences box (with the gear icon).
3. Select Batch Preferences in the orange tabs on the left side of the screen.

Once you have specified your batch preferences, click save preferences and return to batch by clicking Batch, then Batch Search.

**Batch Templates**

If you do not yet have an input file to upload, click the “Download a batch criteria template” and select your template type. The Batch Input/Output Templates features allows you to customize content to meet your specific needs. Provides two batch types:

- Input Template: Allows custom data mapping of subject search criteria.
- Output Template: Allows custom data mapping of batch results. Allows you to create up to 20 Input & Output Templates.

**Using a Batch Criteria Template**

For a new file, the application provides batch criteria templates that you can download and save as Input Templates. This functionality may be beneficial if you would like to use a preformatted file to enter your subject search criteria.

For an existing file that contains your subject search criteria you can upload the custom file, map search criteria, and then save as an Input Template.

*User Data Fields are fields that you might want the system to return in the output file, but not search against when running the batch.*
Running Batch Search

After you complete the steps for input and output click Run Search to process your request.

To view your results, go to Results and select Batch Results. Batch results are stored for 7 days. This may take up to 10 minutes before the Batch results are available. The length of time your file takes to process depends on the size. When your file is ready, the status will change to Available.

NOTE: You can also customize your Batch Preferences to be notified via email or at sign-on.

Click the Available link. A pop-up will appear showing the summary of your results. To download and view your files, click the link highlighted in blue. After you click the link, the results will be downloaded to your computer.

Looking for more information?

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For assistance using CLEAR, call Customer Support at +1 877 242 1229.

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