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## Banner General

Common Matching

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## Introductions

- Name
- Organization
- Title/function
- Job responsibilities
- Banner experience
- Expectations

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## Course Goal

- The goal of this course is to provide you with the knowledge and practice to set up and use the Common Matching process at your institution.

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## Agenda

- Overview
- Set Up
- Day-to-Day Operations
- Question and Answer

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## Overview

### Common Matching:

- uses a rules-based algorithm to check for possible database matches before a new person or non-person is added to the system
- replaces the existing algorithms from Financial Aid and Student with a centralized algorithm

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## About the Process

### Institutions can:

- require the matching process to be performed prior to new records being added
- define forms to call for additional info when resolving potential matches

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## About the Forms

- Common Matching is used in batch data load processes and online forms that are used to create new person and non-person records
- For simplicity, we refer to “%IDEN” forms when discussing Common Matching

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## Set Up Objectives

At the end of this section, you will be able to:

- identify the control, rule, and validation forms applicable to Common Matching
- establish Common Matching source codes for batch and online processing
- assign Common Matching source codes to specific users

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## Setup Objectives, Continued

- establish rules for Common Matching source codes
- select the type of records to compare for the Common Matching process
- define default types for address, telephone, and e-mail
- define aliases for persons and non-persons

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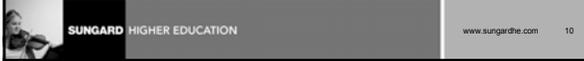
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## Control, Rule, and Validation Forms

- Common Matching Source Code Validation (GTVCMSC)
- Common Matching Source Rules (GORCMSC)
- Common Matching Data Dictionary (GORCMDD)
- Name Translation Rules (GORNAME)
- Non-Person Name Translation Rules (GORNPNM)
- Common Matching Rules (GORCMRL)
- Common Matching User Setup (GORCMUS)
- Installation Controls (GUAINST)



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## Common Matching Source Code Validation (GTVCMSC)

- Create the source codes used for Common Matching
- Comment field viewable from GORCMRL and GOAMTCH



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## Common Matching Source Rules (GORCMSC)

- Set up defaults to be used with a particular source code
- Indicate if the source code will be used for online matching
- Identify whether the source code will be used to match against person data and/or non-person data
- Specify forms to which the user can navigate for more info
- Assign default Address, Telephone, and E-mail types to the source code



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## Common Matching Source Rules (GORCMSC) (cont.)

- **Transpose Date Month/Day option**
- **Transpose First Name/Last Name option**
- **Allow Alias Wildcard Use option**
- **Allow Length Override option**
- **Prevent ID Creation on API Failure option**
- **Hierarchy of Display – Address / Telephone / E-Mail**
  - Allows address information to display even if address information does not match
  - Matching info displays first, hierarchy displays if no matching addresses are found



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## Common Matching Data Dictionary (GORCMDD)

- **Use delivered data elements for the Common Matching process**
- **Add data elements to be used with package procedures developed by your institution**
- **Birth Date element allows for full date comparison**
- **SSN and Last Name/Non-Person Name are now Core Matching Elements (formerly called “required elements”)**
  - Can search on SSN only



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## Name Translation Rules (GORNAME)

- **Associate aliases for person names**
- **Used for first and middle names**
- **Delivered with data for common names**



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## Non-Person Name Translation Rules (GORNPNM)

- Associate aliases with non-person names
- Delivered without seed data

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## Common Matching Rules (GORCMRL)

- Create the matching rules and assign the specific database values which each rule will use in the matching algorithm
- Assign a priority number to each rule set
- Copy previously created rules
- Add specific procedures for matching components not within General Banner tables

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## Common Matching Rules (GORCMRL) (cont.)

- **New terminology**
  - "Rule Priorities" are now **Rule Sets with Priority Numbers**
  - "Create Required Rules" is now **Insert Core Matching Elements**
  - "Data Required" is now **Match On Null Data – Yes or No**
- **Populate Core Matching Elements into your rule set**
- **Allow or disallow NULL matches on Banner or Incoming**
- **Create rule set comments from Matching Rules tab**

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## Common Matching User Setup (GORCMUS)

- Assign a default online matching source code to a specific Banner user
- Specify whether users are allowed to choose from other matching source codes or if they are restricted to using the default
- Exempt selected users from the mandatory process



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## Installation Controls (GUAINST)

- Set up institutional controls
- Select whether to call the Common Matching Entry Form automatically when creating a new record from %IDEN forms
  - Online Matching Process Enabled checkbox



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## Setup Review

- On what form is the Online Matching Process Enabled checkbox located?
- Which form is used to create the source codes?
- Which form is used to assign a default online matching source code to a specific Banner user?
- Which form is delivered with available data elements that may be used in Common Matching?



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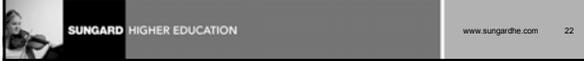
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## Day-to-Day Objectives

At the end of this section, you will be able to:

- execute the Common Matching algorithm when creating persons and non-persons
- identify the results of the Common Matching process



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## Day-to-Day Process

- Common Matching form can be called from key blocks of person/non-person data entry forms
- Users may execute the common matching process during data entry of person information
- If a matching record exists, users have the option to enhance existing data by inserting new information



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## Matching Status

- Three possible results:
  - New
  - Match
  - Potential Match



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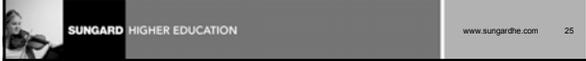
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## Common Matching Entry (GOAMTCH)

- Determine whether an entity matches an existing record before it is entered into the database



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## Common Matching Entry (GOAMTCH) (cont.)

- **Changes:**
  - Form redesign
  - Redesigned Potential Match and Match tabs
  - More realistic Potential Match count
  - Can use Hierarchy functionality from GORCMRS
  - Inactive address, telephone, email indicated by \*
  - Improved Match Result message
  - All Addresses, Telephones, E-Mails lists



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## Accessing GOAMTCH

- Can be called automatically from %IDEN forms, based on:
  - Online Matching Process Enabled checkbox on GUAINST
  - Exclude User checkbox on GORCMUS
  - ID that does not exist or ID that is generated
- Can also be accessed from the Options menu while in the key block of %IDEN form



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## Determining a Match

- **New**
  - Create New – create a new PIDM
- **Match**
  - Select ID – select the record and carry it back to the key block of %IDEN form
  - Update ID – update the record with data from top block
- **Potential Match**
  - Details – review info on other forms
  - Determine if person is new or a match; then select Create New, Select ID, or Update ID



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## Common Matching Source Search (GOICMSS)

- New query form
- Displays all matching sources using an element
- Enables quick update of rules



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## Common Matching and Batch Loads

- Used for reviewing records which have been loaded to the temporary tables by a batch process
- When using a form for reviewing data loaded by a batch process, GOAMTCH is called

*continued on next slide*



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## Common Matching and Batch Loads, Continued

### Batch Processes

- RCPMTCH
- SARETMT
- SRRSRIN

### Batch Process Review Forms

- RCRSUSP
- SAAEAPS
- SHAEDIS
- SRIPREL

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## Day-to-Day Review

1. What are the three possible results of Common Matching?
2. True or False: GOAMTCH can be called automatically when a user tries to create a new person record.
3. On GOAMTCH, which button allows you to view additional info about a potential match on other forms?

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## Course Summary/Review

As a result of this course, you have

- identified the control, rule, and validation forms applicable to Common Matching
- established Common Matching source codes for batch and online processing
- assigned Common Matching source codes to specific users
- established rules for Common Matching source codes

*continued on next slide*

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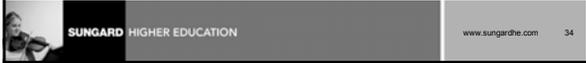
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## Course Summary/Review, Continued

- selected the type of records to compare for the Common Matching process
- defined default types for address, telephone, and e-mail when creating new person/non-person records
- defined aliases for persons and non-persons
- executed the Common Matching algorithm when creating persons and non-persons
- identified the results of the Common Matching process



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## Questions and Answers

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Thank you for your participation

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