

# Banner General Common Matching Training Workbook

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# Table of Contents

<b>Section A: Introduction</b> .....	<b>4</b>
Overview .....	4
Process Introduction .....	5
Terminology .....	6
<b>Section B: Set Up</b> .....	<b>7</b>
Overview .....	7
Common Matching Source Code Validation .....	8
Common Matching Source Rules.....	10
Common Matching Data Dictionary .....	13
Name Translation Rules .....	15
Non-Person Name Translation Rules .....	17
Common Matching Rules.....	19
Common Matching User Setup .....	24
Installation Controls .....	27
Self Check .....	29
Answer Key for Self Check.....	31
<b>Section C: Day-to-Day Operations</b> .....	<b>33</b>
Overview .....	33
Process Introduction .....	34
Using Common Matching .....	35
Querying Matching Sources.....	40
Common Matching and Batch Loads .....	42
Summary .....	43
Self Check .....	44
Answer Key for Self Check.....	45
<b>Section D: Reference</b> .....	<b>46</b>
Overview .....	46
Setup Forms and Where Used .....	47
Forms and Processes Used with Common Matching.....	48
Forms Job Aid .....	49



## Section A: Introduction

### Lesson: Overview

◀ Jump to TOC

#### **Workbook goal**

The goal of this workbook is to provide you with the knowledge and practice to set up and maintain the Common Matching process at your institution. The workbook is divided into these sections:

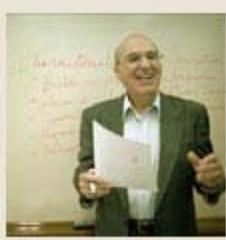
- Introduction
- Set Up
- Day-to-Day Operations
- Reference

#### **Intended audience**

Personnel who are responsible for entering person and non-person records into the database and system administrators

#### **Section contents**

Process Introduction .....	5
Terminology .....	6



## Section A: Introduction

### Lesson: Process Introduction

◀ [Jump to TOC](#)

#### Overview

**Multiple PIDM Prevention** began as a project to prevent the creation of duplicates when person and non-person records are added to the database. **Common Matching** is part of the overall multiple PIDM prevention project.

#### Common Matching

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

#### About the process

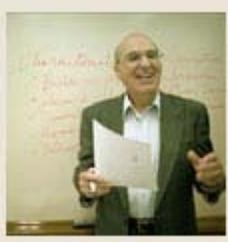
When setting up Common Matching,

- institutions can require the matching process to be performed prior to new records being inserted into the database
- institutions can define forms to call for additional information when resolving potential matches.

#### About the forms

Common Matching is used in batch data load processes and online forms that are used to create new person or non-person records (e.g., SPAIDEN).

For simplicity, this workbook refers to “%IDEN” forms when discussing Common Matching. *Section D: Reference* contains a listing of the forms and processes that work with Common Matching.



## Section A: Introduction

### Lesson: Terminology

◀ [Jump to TOC](#)

#### **API**

Application Programming Interface: A set of methods through which an application exposes business logic and/or data. For Banner, this refers to the Banner Common Business APIs that all client application types must use. These APIs provide consolidated business logic to make Banner “messaging enabled.”

#### **Common Matching**

The name of the algorithm used to determine if a person or non-person is new to the system before being added to the database.

#### **Data dictionary**

Database columns available for use in matching.

#### **Multiple PIDM prevention**

Project designed to create a single rule-driven process in order to determine if an entity (person or non-person) is new to the system before it is added to the database. Common Matching is part of the overall multiple PIDM prevention project.

#### **Source code**

A code assigned to a group of rules to be used with the matching algorithm. The source codes may be by functional area, process, or source of data.

#### **UI**

User Interface: Everything designed into an information device with which a human being may interact - including display screen, keyboard, mouse, light pen, the appearance of a desktop, illuminated characters, help messages, and how an application program or a Web site invites interaction and responds to it.



## Section B: Set Up

### Lesson: Overview

◀ Jump to TOC

#### Introduction

The purpose of this section is to outline the Common Matching setup process and detail the procedures of the setup.

#### Intended audience

Personnel responsible for entering person and non-person records into the database; system administrators

#### 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
- 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 email when creating new person/non-person records
- define aliases for persons and non-persons.

#### Prerequisites

To complete this section, you should have completed the SunGard Higher Education Education Practices computer-based training (CBT) tutorial “Banner 7.x Fundamentals,” or have equivalent experience navigating in the Banner system.

#### Section contents

Common Matching Source Code Validation .....	8
Common Matching Source Rules.....	10
Common Matching Data Dictionary .....	13
Name Translation Rules .....	15
Non-Person Name Translation Rules .....	17
Common Matching Rules.....	19
Common Matching User Setup .....	24
Installation Controls .....	27
Self Check .....	29
Answer Key for Self Check.....	31



## Section B: Set Up

### Lesson: Common Matching Source Code Validation

◀ Jump to TOC

#### Purpose

The Common Matching Source Code Validation Form (GTVCMSC) is used to create the various source codes that may be used in Common Matching.

#### Banner form

Matching Source	Description	User ID	Activity Date
103345	Defect test can i update this?	SYSTEMST07	13-APR-2006
105897	defect 105897	SYSTEMST07	17-APR-2006
ADVANCEMENT	Advancement Match Rule	SYSTEMST10	10-NOV-2004
ADVANCE_NON_PERSON	Advancement Non-Person Match	SYSTEMST10	30-NOV-2004
ADVANCE_PERSON	Advancement Person Match	SYSTEMST10	30-NOV-2004

Common Matching Source Code.  
Record: 1/? | ... | <OSC>

The new **Comment** field for each code is viewable from GORCMRL and GOAMTCH, and has a maximum of 4000 characters.



## Section B: Set Up

### Lesson: Common Matching Source Code Validation (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to define source codes for online matching and batch process matching.

Step	Action
1	Access the Common Matching Source Code Validation Form (GTVCMSC).
2	Perform an <b>Insert Record</b> function.
3	Enter a source code for online matching.  <u>Example:</u> <i>ONLINE ADMISSIONS</i>
4	Enter a description of the source code.  <u>Example:</u> <i>Admissions Online Data Entry</i>
5	Perform an <b>Insert Record</b> function.
6	Enter a source code for batch processes.  <u>Example:</u> <i>SAT</i>
7	Enter a description of the source code.  <u>Example:</u> <i>SAT Batch Process</i>
8	Repeat the process to enter new source codes as necessary.
9	Click the <b>Save</b> icon.
10	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Common Matching Source Rules

◀ Jump to TOC

#### Purpose

The Common Matching Source Rules Form (GORCMSC) is used to set up defaults to be used with a particular source code, and indicate if the source code will be used for online matching. This form is also used to identify whether the source code will be used to match against person data and/or non-person data.

**Example:** You can assign default Address, Telephone, and E-mail types to the source code, which will default into the Common Matching Entry Form (GOAMTCH) if the source code is used from there.

**Optional:** The Option Display Rules block allows you to specify forms to which the user can navigate on the Common Matching Entry Form (GOAMTCH). This enables users to see more detailed information about possible matched records.

#### Banner form

Common Matching Source Rules GORCMSC 7.3 (s7s70)

Matching Source:   EDE Dataload

---

**Options**

Match Type:

Use for Online Common Matching

Transpose Date Month / Day

Transpose First Name / Last Name

Allow Alias Wildcard Use

Allow Length Override

Prevent ID Creation on API Failure

**Data Entry/Update Defaults**

Address:   Permanent

Telephone:   Permanent

E-mail:   Home

Create Hierarchy of Display using Defaults

User ID:  Activity Date:

---

**Hierarchy of Display**

Address	Telephone	E-mail
<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>

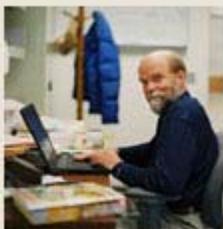
---

**Detail List**

Object	Sequence	User ID	Activity Date
<input type="text" value="SPAIDEN"/> <input type="button" value="v"/> General Person Identification	<input type="text" value="1"/>	<input type="text" value="SYSTEM18"/>	<input type="text" value="21-OCT-2004"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Matching Source will be matching Person, Non-person, or Both types of records.

Record: 1/1 | | ... | | <OSC>



## Section B: Set Up

### Lesson: Common Matching Source Rules (Continued)

◀ Jump to TOC

#### New features

New options on this form include:

- **Transpose Date Month/Day** must include "Birth Date" element in Rule. It allows matching on transposed dates; for example, 01/05 could match January 5<sup>th</sup> and May 1<sup>st</sup>.
- **Transpose First Name/Last Name** allows matching on transposed name elements; for example, Thomas Lee and Lee Thomas.
- **Allow Alias Wildcard Use** appends a % to incoming data to search for similar rows in Alias Tables (GORNAME). For example, 'Bet' entered on GOAMTCH will find 'Beth = Elizabeth' in an Alias Table and return potential matches with the first or middle name 'Elizabeth.'
- **Allow Length Override** uses the length of incoming data to search for matches on name fields if the length of data on the rule is greater than data input.
  - The rule specifies a length of 5 for the First Name element
  - For example, if 'Sam' is entered in the **First Name** field on GOAMTCH, potential matches that begin with 'Sam' like 'Samuel,' 'Samantha' and 'Samson' will be found
- **Prevent ID Creation on API Failure** mandates that complete information for Address, Telephone and/or E-Mail must be provided in order to create a new ID. Creation may proceed by removing partial information. This check box does not affect batch loads.

#### New block

The Hierarchy of Display – Address / Telephone / Email block allows address information to be displayed even if address information does not match. Matched addresses will be displayed first; if no matching addresses are found, the hierarchy will be used.

Hierarchy of Display		
<b>Address</b>	<b>Telephone</b>	<b>E-mail</b>
<input type="checkbox"/> MA Mailing	<input type="checkbox"/> MA Mailing	<input type="checkbox"/> HOME Home
<input type="checkbox"/> DA Dormitory	<input type="checkbox"/> RH Residence Hall	<input type="checkbox"/> SCHL School
<input type="checkbox"/> BI Billing	<input type="checkbox"/> BI Billing	<input type="checkbox"/> BUSI Business

The **Create Hierarchy of Display Using Defaults** icon, when selected, populates the first fields of Hierarchy blocks if the Data Entry/Update Defaults information is valid.



## Section B: Set Up

### Lesson: Common Matching Source Rules (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to define defaults for address, email, and phone type to be used with a particular source code, and indicate if the source code will be used for online matching.

Note: The steps below assume that matching has been enabled on the Installation Controls Form (GUAINST) and the matching source code has been defined on Common Matching Source Code Validation Form (GTVCMSV).

Step	Action
1	Access the Common Matching Source Rules Form (GORCMSV).
2	Using the <b>Matching Source</b> field, select the matching source code you created on the Common Matching Source Code Validation Form (GTVCMSV).
3	Enter an address type code in the <b>Address Type</b> field.  <u>Note:</u> Setting up default types for address, telephone, and email records is optional.
4	Enter a telephone type code in the <b>Telephone Type</b> field.
5	Enter an e-mail type code in the <b>E-mail Type</b> field.
6	Check the <b>Use for Online Common Matching</b> checkbox to indicate that the source code can be used with online matching.  <u>Note:</u> Any source code could be used for batch processing.
7	Use the <b>Match Type</b> field to specify that this code will be used to match on persons, non-persons, or both. Select <i>Person</i> .
8	Click the <b>Save</b> icon.
9	Perform a <b>Next Block</b> function to access the Common Matching Detail List block.  <u>Note:</u> In this example, you will use this block to indicate that the user can access SOAIDEN and GOAEMAL while on the Matching window of GOAMTCH.
10	Enter SOAIDEN in the <b>Object</b> field.
11	Enter 1 in the <b>Sequence</b> field.
12	Enter GOAEMAL in the <b>Object</b> field.
13	Enter 2 in the <b>Sequence</b> field.
14	Click the <b>Save</b> icon.
15	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Common Matching Data Dictionary

◀ Jump to TOC

#### Purpose

The Common Matching Data Dictionary Form (GORCMDD) is delivered with available data elements that may be used for the Common Matching process. You can add data elements as necessary to be used with package procedures developed by your institution.

#### Banner form

Base Table	Column	Element	Maximum Length	Length Updateable	Allow Negative Length	Online Indicator	Core Matching Element	System Required	Activity Date
GOREMAL	GOREMAL_EMAIL_ADDRES	EMAIL	90	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24-SEP-2004
GORNAME	GORNAME_ALIAS	FIRST NAME ALIAS	21	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	22-NOV-2004
GORNAME	GORNAME_NAME	FIRST NAME	15	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	29-NOV-2004
GORNPNM	GORNPNM_NAME	NAME	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30-NOV-2004
SABSUPL	SABSUPL_AMCAS_ID	AMCAS ID	10	<input type="checkbox"/>	07-SEP-2005				
SORHSCH	SOBSBGI_CITY	HIGH SCHOOL CITY	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14-APR-2006
SORHSCH	SOBSBGI_STAT_CODE	HIGH SCHOOL STATE	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	20-APR-2006
SORHSCH	SOBSBGI_ZIP	HIGH SCHOOL ZIPCODE	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12-APR-2005
SORHSCH	SORHSCH_SBGI_CODE	HIGH SCHOOL CODE	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	20-APR-2006
SPBPERS	SPBPERS_BIRTH_DATE	BIRTH DATE	8	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	19-APR-2006
SPBPERS	SPBPERS_BIRTH_DAY	DATE OF BIRTH DAY	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24-SEP-2004
SPBPERS	SPBPERS_BIRTH_MON	DATE OF BIRTH MONTH	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24-SEP-2004
SPBPERS	SPBPERS_BIRTH_YEAR	DATE OF BIRTH YEAR	4	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24-SEP-2004
SPBPERS	SPBPERS_SEX	GENDER	1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24-SEP-2004
SPBPERS	SPBPERS_SSN	SSN/SIN/TIN	9	<input checked="" type="checkbox"/>	19-APR-2006				
SPRADDR	SPRADDR_CITY	CITY	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24-SEP-2004
SPRADDR	SPRADDR_CNTY_CODE	COUNTY	5	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24-SEP-2004
SPRADDR	SPRADDR_NATN_CODE	NATION	5	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24-SEP-2004
SPRADDR	SPRADDR_STAT_CODE	STATE/PROVINCE	3	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24-SEP-2004
SPRADDR	SPRADDR_STREET_LINE1	STREET LINE 1	30	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24-SEP-2004
SPRADDR	SPRADDR_ZIP	ZIP/POSTAL CODE	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24-SEP-2004
SPRIDEN	SPRIDEN_ID	ID	9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24-SEP-2004

Base Table  
Record: 1/?

#### Notes

- The Birth Date element (SPBPERS\_BIRTH\_DATE) enables full date comparison and allows for use of the Transpose Month and Day option from GORCMSC.
- Required Elements are now known as Core Matching Elements.
- SSN and Last Name/Non-Person Name are now both Core Matching Elements.



## Section B: Set Up

### Lesson: Common Matching Data Dictionary (Continued)

◀ Jump to TOC

#### Fields

These fields act as indicators to determine how the data elements are implemented when creating the rules for the Matching Source.

Field	Description
<b>Length Updateable</b>	If checked, indicates that the user can define the number of characters to be used in matching, up to the maximum length specified.
<b>Allow Negative Length</b>	If checked, the negative length will be the number of characters from the end of the field. If not checked, the system will use the first number of characters from the beginning of the field.  <u>Example:</u> Using the last four digits of SSN/SIN instead of the entire field
<b>Online Indicator</b>	If checked, designates the data element is available on the Common Matching Entry Form for use with online matching.
<b>Core Matching Element</b>	If checked, indicates the data element is required for all rules.

#### Procedure

Follow these steps to insert a record into the data dictionary.

Note: The data dictionary delivered with System Indicator of Y cannot be modified or deleted using the Common Matching Data Dictionary Form (GORCMDD). The procedure below is for practice purposes only. Additional technical setup would be needed to actually implement a new data element.

Step	Action
1	Access the Common Matching Data Dictionary Form (GORCMDD).
2	Perform an <b>Insert Record</b> function.
3	Enter <i>SPBPERS</i> in the <b>Base Table</b> field.
4	Enter <i>SPBPERS VETC FILE NUMBER</i> in the <b>Column</b> field.
5	Enter <i>Veteran File number</i> in the <b>Element</b> field.
6	Enter 10 in the <b>Maximum Length</b> field.
7	Select the <b>Allow Negative Length</b> checkbox.  <u>Note:</u> The <b>Allow Negative Length</b> checkbox must be selected to match the characters from the end of the field.
8	Leave the <b>Online Indicator</b> unchecked.
9	Click the <b>Save</b> icon.
10	Click the <b>Exit</b> icon.





## Section B: Set Up

### Lesson: Name Translation Rules (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to associate aliases with person names.

Step	Action
1	Access the Name Translation Rules Form (GORNAME).
2	Perform an <b>Insert Record</b> function.
3	Enter the person name in the <b>Name</b> field.
4	Enter the alias in the <b>Alias</b> field.
5	Click the <b>Save</b> icon.  <u>Warning:</u> Once the name/alias has been saved, no updates may be made to the record. The record must be deleted and re-entered if changes are necessary.
6	Click the <b>Exit</b> icon.





## Section B: Set Up

### Lesson: Non-Person Name Translation Rules (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to associate aliases with non-person names.

Step	Action
1	Access the Non-Person Name Translation Rules Form (GORNPNM).
2	Perform an <b>Insert Record</b> function.
3	Enter the non-person name.
4	Enter the alias.
5	Click the <b>Save</b> icon.  <u>Warning:</u> Once the name/alias has been saved, no updates may be made to the record. The record must be deleted and re-entered if changes are necessary.
6	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Common Matching Rules

◀ Jump to TOC

#### Purpose

The Common Matching Rules Form (GORCMRL) is used to set up the actual matching rules associated with the source code.

Use this form to

- create the matching rules and assign the specific database values which each rule will use in the matching algorithm
- assign a priority to each rule
- copy previously created rules.

This form also allows for adding specific database procedures for matching components that are not within General Banner tables (e.g., matching on high school data for Banner Student) to the matching rule.

Note: You must set up the matching source code on the Common Matching Source Rules Form (GORCMSC) prior to setting up the rules on GORCMRL.

#### Banner form

Common Matching Rules GORCMRL 7.3 (s7s70)

Matching Source: ST\_ADDRESS\_HIERARCHY ST\_ADDRESS\_HIERARCHY  
 Comment: ST\_ADDRESS\_HIERARCHY

---

**Rule Set**

Priority	Description	User ID	Activity Date
1		SYSTEST07	03-MAY-2006

Rule Set Comment  
 Element=Last Name/Non-Person Name, Length=60, Match on NULL Data=No;  
 Element=SSN/SIN/TIN, Length=9, Match on NULL Data=No;

Create Comments from Matching Rules    Insert Core Matching Elements

---

Matching Rules (5)    Copy To (0)    Matching Procedures (0)

Column	Element	Length	Match on Null Data	User ID	Activity Date
GOREMAL_EMAIL_ADDRESS	EMAIL	90	<input checked="" type="radio"/> Yes <input type="radio"/> No	SYSTEST07	04-MAY-2006
SPBPERS_SSN	SSN/SIN/TIN	9	<input type="radio"/> Yes <input checked="" type="radio"/> No	SYSTEST07	03-MAY-2006
SPRADDR_ZIP	ZIP/POSTAL CODE	5	<input checked="" type="radio"/> Yes <input type="radio"/> No	SYSTEST07	03-MAY-2006
SPRIDEN_SEARCH_LAST_NAME	LAST NAME/NON-PERSON NAME	60	<input type="radio"/> Yes <input checked="" type="radio"/> No	SYSTEST07	03-MAY-2006
SPRTELE_PHONE_AREA	TELEPHONE AREA CODE	3	<input checked="" type="radio"/> Yes <input type="radio"/> No	SYSTEST07	04-MAY-2006
			<input type="radio"/> Yes <input type="radio"/> No		
			<input type="radio"/> Yes <input type="radio"/> No		
			<input type="radio"/> Yes <input type="radio"/> No		

Priority Number to assign to the rule set for this Common Matching Source.  
 Record: 1/1    ...    <OSC>



## Section B: Set Up

### Lesson: Common Matching Rules (Continued)

◀ [Jump to TOC](#)

#### How the algorithm processes rules

The Common Matching algorithm can process multiple rules. Each rule set has a priority number to specify the order in which it is processed.

The Common Matching procedure will process each rule in order, separately and completely:

##### Step 1

The algorithm will perform the primary matching for the rule using name and/or SSN as defined in the rule to establish the population on which the rest of the processing (secondary match) will be performed. If it does not find a match, the external record is considered *New*.

##### Step 2

The algorithm will perform the secondary matching processing against the results of the primary match.

- If the programming logic finds an exact match with only one record, the external source record is considered a *Match*.
- If more than one record is matched to the criteria, the external source record is considered in *Suspense*. The record from the external source is also considered in suspense if the data matches some of the criteria but not all of it.
- If the results are *New* or *Match*, the results are returned to the calling process. No other rules are processed.

##### Step 3

The algorithm continues evaluating all the rules for the matching source, one at a time. When all the rules have been processed (or a Match has been found), the algorithm will return the results to the calling process.

The Match Status (*Matched* or *Suspense*) will be returned with a status message specifying which elements were matched, which ones were not matched, and which ones were missing, based on the rules.

Note: It is possible for a record to have different statuses due to different rules. A record could be considered a “suspense” (potential match) under one rule and a match using one of the subsequent rules. In those cases, the record’s status is Match, but the user can see the potential matches that were discovered using the prior rules on the Common Matching Entry Form (GOAMTCH).



## Section B: Set Up

### Lesson: Common Matching Rules (Continued)

◀ Jump to TOC

#### Notes

- "Rule priorities" are now "rule sets" with priority numbers.
- The **Create Required Rules** function is now named **Insert Core Matching Elements**.
  - This function populates Core Matching Elements into your ruleset. These can be removed afterwards, but one or more is necessary; a warning prompt will appear when attempting to save without one or more CMEs present.
- The **Data Required** indicator is now named **Match on Null Data – Yes or No**.
  - When set to YES, Banner and/or Incoming can be either NULL or Identical to match; when set to NO, Banner and Incoming must be NOT NULL and Identical.
- The **Matching Source** field is now accompanied by a **Comment** field. This is populated by GTVCMSC; clicking the edit function accesses GTVCMSC to change the contents there.
- The **Create Comments from Matching Rules** function takes information from the Matching Rules tab and inserts it into Rule Set comments (element, length, setting).



## Section B: Set Up

### Lesson: Common Matching Rules (Continued)

◀ Jump to TOC

#### Procedure: Defining the rules

Follow these steps to define the rules for the online matching source code you created.

Step	Action
1	Access the Common Matching Rules Form (GORCMRL).
2	Enter the matching source code in the <b>Matching Source</b> field.
3	Perform a <b>Next Block</b> function.
4	Enter a priority in the <b>Priority</b> field.
5	Enter a description of the rule in the <b>Description</b> field.
6	Click the <b>Save</b> icon.
7	Click the <b>Insert Core Matching Elements</b> icon.  <u>Result:</u> This pulls any required data elements into the next block, such as SPRIDEN_SEARCH_LAST_NAME.
8	Select these data elements from the LOV: <ul style="list-style-type: none"><li>• SPBPERS_SSN</li><li>• SPRIDEN_SEARCH_FIRST_NAME</li><li>• SPRADDR_ZIP</li></ul>
9	For SPRIDEN_SEARCH_LAST_NAME, update the length from 60 to 10.  <u>Result:</u> The first 10 characters of the last name will be used when matching the data element.
10	For SPRIDEN_SEARCH_FIRST_NAME, update the length from 15 to 5.  <u>Result:</u> The first 5 characters of the first name will be used when matching the data element.
11	For SPBPERS_SSN, update the length from 9 to -4.  <u>Result:</u> The last 4 characters of the SSN/SIN/TIN will be used when matching the data element.
12	Update the <b>Match on Null Data</b> indicator for SPBPERS_SSN to <i>YES</i> .
13	Click the <b>Save</b> icon and proceed to the next exercise.



## Section B: Set Up

### Lesson: Common Matching Rules (Continued)

◀ Jump to TOC

#### Procedure: Entering a new priority

Follow these steps to enter a new priority and copy the rule you just created to that priority.

Step	Action
1	With your cursor in the Priorities field, perform an <b>Insert Record</b> function.
2	Enter a new priority and description.
3	Click the <b>Save</b> icon.
4	Use the Up Arrow to navigate to the priority you created in Exercise 1.
5	Select the <b>Copy Rules to</b> tab.
6	Use the LOV to select the new priority.  <u>Result:</u> The <b>Source Code</b> and <b>Priority</b> fields will populate with the appropriate values. Only priorities that do not have rules will be listed.
7	Click the <b>Save</b> icon.
8	Click the <b>Matching Rules</b> tab to view the rules.
9	Click the <b>Exit</b> icon.

#### Procedure: Using the Matching Procedures tab

Follow these steps to use the Matching Procedures tab.

Step	Action
1	Access the Common Matching Rules Form (GORCMRL).
2	Enter the matching source code in the <b>Matching Source</b> field.
3	Select the <b>Matching Procedures</b> tab.
4	Enter a sequence number in the <b>Sequence</b> field.
5	Enter the name of the package procedure to be called by the Common Matching process in the <b>Procedure</b> field.  <u>Example:</u> SAKMTCH.P_MATCH_SORHSCH
6	Click the <b>Save</b> icon
7	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Common Matching User Setup

◀ Jump to TOC

#### **Introduction**

Now that you have set up the rules and validation codes needed for Common Matching, you are ready to enable Common Matching for the institution and set it up for specific users.

#### **Purpose**

The Common Matching User Setup Form (GORCMUS) allows you to assign a default online matching source code to a specific Banner user (Oracle User ID) for online Common Matching processing. Additionally, you can use this form to specify whether users are allowed to choose from other matching source codes or if they are restricted to using the default.

How implemented: When the user enters the GOAMTCH form, the assigned matching source code will default in the key block. Based upon the rules set on GORCMUS, the user may be able to change this source code.

#### **Excluding users**

Using GORCMUS, you can exempt selected users from the mandatory process by selecting the **Exclude User** checkbox.

Example: If the user is a “super-user” who never creates duplicates, you may exempt the user from having the matching form appear on SPAIDEN by checking the **Exclude User** checkbox.



## Section B: Set Up

### Lesson: Common Matching User Setup (Continued)

◀ Jump to TOC

#### Banner form

User ID	Online Matching Source	Description	Allow Other Matching Sources	Exclude User	Activity Date
CSZKARAD	CS1	Cindy's rule one	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13-JUN-2005
DMCGARRY	DM_VENDOR_BOTH	Vendor matching for both person & non-pe	<input checked="" type="checkbox"/>	<input type="checkbox"/>	31-JAN-2005
SYSTEST01			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13-DEC-2004
SYSTEST02			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	09-MAY-2005
SYSTEST04			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	05-MAY-2005
SYSTEST05	DM_VENDOR_BOTH	Vendor matching for both person & non-pe	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-MAY-2006
SYSTEST06			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	09-MAY-2005
SYSTEST07	RAC	rac test	<input checked="" type="checkbox"/>	<input type="checkbox"/>	08-MAY-2006
SYSTEST08	CS3	Cindys Both rule	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-MAY-2006
SYSTEST09	ADVANCE_PERSON	Advancement Person Match	<input checked="" type="checkbox"/>	<input type="checkbox"/>	28-APR-2006
SYSTEST10	ADVANCE_NON_PERSON	Advancement Non-Person Match	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	28-APR-2006
SYSTEST11	HR_SYSTEST1	HR's system test rule	<input checked="" type="checkbox"/>	<input type="checkbox"/>	01-MAY-2006
SYSTEST12	HR_SYSTEST1	HR's system test rule	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10-NOV-2004
SYSTEST15	DMF	Dayna's Online Matching Rule	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	16-NOV-2004
SYSTEST17	STUDENT_SYS_TEST	Student online rule	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	27-APR-2006
SYSTEST18	SL_ONLINE	Sue's Online rule	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13-DEC-2004
SYSTEST19			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	29-MAR-2006
SYSTEST20			<input checked="" type="checkbox"/>	<input type="checkbox"/>	18-APR-2006
SYSTEST21			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	14-OCT-2004
SYSTEST22	MAG	Michael's Matching Rule	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	28-MAR-2006
SYSTEST23			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	26-OCT-2004
SYSTEST25			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	26-OCT-2004

Enter the User ID to establish Common Matching setup; press LIST for valid values. Insert or Delete value only, Update not allowed.

Record: 1/? | ... | <OSC>



## Section B: Set Up

### Lesson: Common Matching User Setup (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to assign a default online matching source code to a specific Banner user.

Step	Action
1	Access the Common Matching User Setup Form (GORCMUS).
2	Enter the username in the <b>User ID</b> field or select one from the LOV.
3	Enter the source code in the <b>Online Matching Source</b> field or select one from the LOV.  <u>Result:</u> The information in the <b>Description</b> field will default.
4	Click the <b>Allow Other Matching Sources</b> checkbox if you want to allow the user to select a source code other than the default.
5	Leave the <b>Exclude User</b> checkbox unchecked.  <u>Note:</u> Clicking the <b>Exclude User</b> checkbox exempts the user from calling the Common Matching Entry Form automatically when creating new records.
6	Click the <b>Save</b> icon.
7	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Installation Controls

◀ Jump to TOC

#### Purpose

Use the Installation Controls Form (GUAINST) to set up institutional controls, including the option to use the Common Matching process when creating a new person or non-person record. In other words, this form enables you to “turn on” online Common Matching for the entire institution.

Use the **Online Matching Process Enabled** to enable online Common Matching. If checked, the Common Matching Entry Form (GOAMTCH) will be called when a user creates a record on %IDEN forms. If not checked, the Common Matching Entry Form (GOAMTCH) will not be called automatically.

#### Banner form

Installation Information		
	Release	Date
<input checked="" type="checkbox"/> Advancement	7.3	18-MAY-2006
<input checked="" type="checkbox"/> Accounts Receivable	7.3	21-MAR-2006
<input checked="" type="checkbox"/> Financial Aid	7.4.1	17-FEB-2006
<input type="checkbox"/> Other Financial Aid		
GENERAL	7.3	21-MAR-2006
<input checked="" type="checkbox"/> Finance	7.2	21-MAR-2006
<input checked="" type="checkbox"/> Human Resources	7.2	21-MAR-2006
<input checked="" type="checkbox"/> Position Control	7.3	21-MAR-2006
<input checked="" type="checkbox"/> Student	7.3	22-MAR-2006



## Section B: Set Up

### Lesson: Installation Controls (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Installation Controls Form (GUAINST).
2	Update any existing information, if necessary. <u>Example:</u> Name, address, or installation information
3	Select the <b>Online Matching Process Enabled</b> checkbox to enable Common Matching.
4	Click the <b>Save</b> icon.
5	Click the <b>Exit</b> icon.



## Section B: Set Up

### Lesson: Self Check

◀ Jump to TOC

#### Directions

Use the information you have learned in this workbook to complete this self-check activity.

#### Question 1

You would like the Common Matching Entry Form (GOAMTCH) to be called automatically when a user creates a record on %IDEN forms. To do this, you would select the **Online Matching Process Enabled** checkbox on the Installation Controls Form (GUAINST).

True or False

#### Question 2

Identify the form used to create the source codes that may be used in Common Matching.

#### Question 3

You want to assign a default Address type to the source code that will default into the Common Matching Entry Form (GOAMTCH). What form should you use to assign the Address type?

#### Question 4

The Common Matching Rules Form (GORCMRL) allows a default online matching source code to be assigned to a specific Banner User ID.

True or False

#### Question 5

The Common Matching Data Dictionary Form (GORCMDD) is delivered with available data elements that may be used for the Common Matching process.

True or False



## Section B: Set Up

### Lesson: Self Check (Continued)

◀ Jump to TOC

#### Question 6

Use this form to create the matching rules and assign the specific database values which each rule will use in the matching algorithm and to assign a priority to each rule.

- a) Installation Controls Form (GUAINST)
- b) Non-Person Name Translation Rules Form (GORNPNM)
- c) Common Matching Source Rules Form (GORCMSC)
- d) Common Matching Rules Form (GORCMRL)

#### Question 7

There is no seed data delivered with the Non-Person Name Translation Rules Form (GORNPNM).

True or False



## Section B: Set Up

### Lesson: Answer Key for Self Check

◀ Jump to TOC

#### Question 1

You would like the Common Matching Entry Form (GOAMTCH) to be called automatically when a user creates a record on %IDEN forms. To do this, you would select the **Online Matching Process Enabled** checkbox on the Installation Controls Form (GUAINST).

**True**

#### Question 2

Identify the form used to create the source codes that may be used in Common Matching.

**Common Matching Source Code Validation (GTVCMS)**

#### Question 3

You want to assign a default Address type to the source code that will default into the Common Matching Entry Form (GOAMTCH). What form should you use to assign the Address type?

**Common Matching Source Rules (GORCMSC)**

#### Question 4

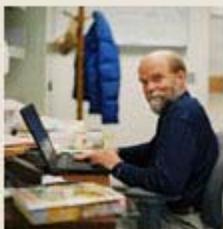
The Common Matching Rules Form (GORCMRL) allows a default online matching source code to be assigned to a specific Banner User ID.

**False. The Common Matching User Setup Form (GORCMUS) allows a default online matching source code to be assigned to a specific Banner User ID.**

#### Question 5

The Common Matching Data Dictionary Form (GORCMDD) is delivered with available data elements that may be used for the Common Matching process.

**True**



## Section B: Set Up

### Lesson: Answer Key for Self Check (Continued)

◀ Jump to TOC

#### Question 6

Use this form to create the matching rules and assign the specific database values which each rule will use in the matching algorithm and to assign a priority to each rule.

- a) Installation Controls Form (GUAINST)
- b) Non-Person Name Translation Rules Form (GORNPNM)
- c) Common Matching Source Rules Form (GORCMSC)
- d) **Common Matching Rules Form (GORCMRL)**

#### Question 7

There is no seed data delivered with the Non-Person Name Translation Rules Form (GORNPNM).

**True**



## Section C: Day-to-Day Operations

### Lesson: Overview

◀ Jump to TOC

#### Introduction

The purpose of this section is to explain the regular process and to detail the procedures to use Common Matching when entering person and non-person records.

#### Intended audience

Personnel responsible for entering person and non-person records into the database

#### 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.

#### Prerequisites

To complete this section, you should have completed the SunGard Higher Education Education Practices computer-based training (CBT) tutorial “Banner 7.x Fundamentals,” or have equivalent experience navigating in the Banner system.

#### Section contents

Process Introduction .....	34
Using Common Matching .....	35
Querying Matching Sources .....	40
Common Matching and Batch Loads .....	42
Summary .....	43
Self Check .....	44
Answer Key for Self Check.....	45



## Section C: Day-to-Day Operations

### Lesson: Process Introduction

◀ Jump to TOC

#### About the process

- A Common Matching form can be called from key blocks of person or non-person data entry forms when generating an ID or entering an ID that does not exist in Banner.
- If a matching record exists, users have the option to enhance existing data by inserting new information. Existing data will not be overwritten.

#### Matching status

There are three possible results of running the Common Matching algorithm:

- New
- Match
- Potential Match

New: If no records are found to match the rules, a status of *New* is returned. You may then create a new person or non-person record or exit and return to the %IDEN form.

Match: If one and only one record matches the rules, a status of *Match* is returned and the **Match** tab will be highlighted. Data for the matched PIDM will be returned for review.

Potential Match: A status of *Potential Match* occurs if some fields match but not all, or if multiple records match exactly. For example, a potential match would occur if first name and last name match but DOB does not match. When potential matches exist, the **Potential Matches** tab will be highlighted with the number of potential matches and the records which were identified will be listed for review.



## Section C: Day-to-Day Operations

### Lesson: Using Common Matching

◀ Jump to TOC

#### Purpose

The Common Matching Entry Form (GOAMTCH) allows you to determine whether an entity (person or non-person) matches an existing record before it is entered into the database.

#### Banner form

Common Matching Entry GOAMTCH 7.3 (s7s70) View Comments

ID: GENERATED Generate ID Matching Source: ST\_ADDRESS\_HIERARCHY ST\_ADDRESS\_HIERARCHY

**Data Entry**

Last Name: Ricardo  
First Name: Lucy  
Middle Name:  
Address Type: MA Mailing  
Street Line 1:  
Street Line 2:  
Street Line 3:  
City:  
State or Province:  
ZIP or Postal Code:  
County:  
Nation:

**Non-Person Name:**  
SSN/SIN/TIN:  
Birth Date: Day: Month: Year:  
Gender: Null  
Telephone Type: BI Billing  
Telephone:  
E-mail Type: HOME Home  
E-mail:

Duplicate Check Select ID Details Update ID View Comments Create New

Match Potential Matches

ID	Name	Matched Address	Telephone	E-mail

Clear and Return to Data Entry

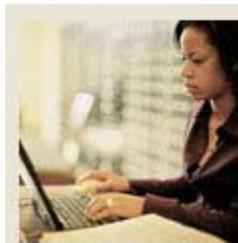
Matching Rule Sets

No Matches

First Name of Person.  
Record: 1/1 | ... | <OSC>

#### Accessing the form

The **Online Matching Process Enabled** checkbox on the Installation Controls Form (GUAINST) determines whether the Common Matching Entry Form (GOAMTCH) is called automatically when creating person or non-person records. If checked, GOAMTCH will be called when a user tries to create a record on %IDEN forms. If not checked, the GOAMTCH will not be called automatically.



## Section C: Day-to-Day Operations

### Lesson: Using Common Matching (Continued)

◀ Jump to TOC

#### Accessing the form, continued

Additionally, if the **Exclude User** checkbox is checked on the Common Matching User Setup Form (GORCMUS), GOAMTCH will not be called automatically.

GOAMTCH will be called if an ID is entered that does not exist or if the **Generate ID** feature is used. If not called automatically, GOAMTCH can be accessed from the **Options** menu from the key block of %IDEN forms.

#### 7.3 form redesign

The GOAMTCH form was redesigned with the 7.3 release, with the following changes:

- The **View Comments** function allows users to view matching source and rules comments.
- **Last Name** is not required; matches can be made solely on SSN. (This is not recommended for batch processes.)
- The form can auto-fill the **City** and **State or Province** fields based on a **ZIP or Postal Code** field entry.
- Options to navigate to the Common Matching Rules Form (GORCMRL) and the Common Matching Source Rules Form (GORCMSC) have been added to the **Options** menu.

The Potential Match and Match tabs have been altered:

- The potential match tab displays one row per personal identifier, and displays a more accurate count of potential matches.
- The Hierarchy of Address / E-Mail / Telephone functionality from GORCMSC has been incorporated. Matches can be shown that match the hierarchy entries rather than Data Entry field values.
- Indication of Inactive Address, Inactive Telephone, Inactive E-Mail and/or Changed ID (with a \*) has been included.
- Match results messages have been improved to indicate NULL matches, Transposed matches and Alias matches.
- **All Addresses**, **All Telephones** and **All E-Mails** lists have been added to this block.



## Section C: Day-to-Day Operations

### Lesson: Using Common Matching (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to use the form.

Note: You can access the Common Matching Entry Form (GOAMTCH) directly; however, in most cases you will access it from another form during the data entry process.

Step	Action
1	Access the data entry form to enter person or non-person data.  <u>Example:</u> General Person Identification Form (SPAIDEN)  <u>Note:</u> See <i>Section D: Reference</i> in this workbook for a guide to the data entry forms that work with Common Matching.
2	Enter the ID of the person to be created or click the <b>Generated</b> icon to generate an ID.  <u>Note:</u> You can choose to select GOAMTCH from the <b>Options</b> menu at this point.
3	Perform a <b>Next Block</b> function.  <u>Result:</u> You are automatically taken to GOAMTCH if this has been enabled on GUAINST and on GORCMUS. The ID or <i>Generated</i> will appear in the <b>ID</b> field.
4	If necessary, choose a source code for the <b>Matching Source</b> field.  <u>Note:</u> This may default in, depending on the setup on GORCMUS.



## Section C: Day-to-Day Operations

### Lesson: Using Common Matching (Continued)

◀ Jump to TOC

#### Procedure, continued

Step	Action
5	Perform a <b>Next Block</b> function.
6	Enter available person data to be used in matching. The information entered in the Data Entry block can be used for updating an existing record or creating a new record.  <u>Note:</u> The minimum requirements are last name for a person record; non-person name for a non-person record.
7	Click the <b>Duplicate Check</b> icon or perform a <b>Next Block</b> function to execute the Common Matching algorithm.  <u>Result:</u> If an exact match is found, the person and their data will display in the <b>Match</b> tab. The <b>Potential Match</b> tab will only be available if other potential matches are found.

IF the result is...	THEN
New	Click the <b>Yes</b> to the prompt create a new PIDM.  <u>Result:</u> A new Banner PIDM is created; data from the top block is inserted into the appropriate tables.
Match	To match the person in the top half of the form to the person found by the match, choose either: <ul style="list-style-type: none"> <li>• <b>Select ID</b> to select the record and carry it back to the key block of the %IDEN form.</li> <li>• <b>Update ID</b> to update the record with data from top block.</li> </ul> Clicking <b>Update ID</b> will update the following data, if it has been entered in the Data Entry block: <ul style="list-style-type: none"> <li>• SSN/SIN/TIN if it is null in Banner</li> <li>• Date of Birth if it is null in Banner</li> <li>• Gender if it is Unknown in Banner</li> <li>• Address, telephone, and e-mail if the type does not exist for the record.</li> </ul> A new sequence for the address will be created if the same type exists but address information is different.



## Section C: Day-to-Day Operations

### Lesson: Using Common Matching (Continued)

◀ Jump to TOC

#### Procedure, continued

Step	Action				
	<table border="1"><thead><tr><th>IF the result is...</th><th>THEN</th></tr></thead><tbody><tr><td>Potential Match</td><td><p>Click the <b>Potential Match</b> tab. Review the data for each potential match.</p><p>Click the <b>Details</b> button to view data about the potential match on other forms. (Defined on GORCMSC.) You can also sort the results dynamically by ID or name.</p><p>Determine if person is new or a match and select the appropriate icon. (<b>Create New</b> or <b>Select ID</b> or <b>Update ID</b>.)</p></td></tr></tbody></table>	IF the result is...	THEN	Potential Match	<p>Click the <b>Potential Match</b> tab. Review the data for each potential match.</p> <p>Click the <b>Details</b> button to view data about the potential match on other forms. (Defined on GORCMSC.) You can also sort the results dynamically by ID or name.</p> <p>Determine if person is new or a match and select the appropriate icon. (<b>Create New</b> or <b>Select ID</b> or <b>Update ID</b>.)</p>
IF the result is...	THEN				
Potential Match	<p>Click the <b>Potential Match</b> tab. Review the data for each potential match.</p> <p>Click the <b>Details</b> button to view data about the potential match on other forms. (Defined on GORCMSC.) You can also sort the results dynamically by ID or name.</p> <p>Determine if person is new or a match and select the appropriate icon. (<b>Create New</b> or <b>Select ID</b> or <b>Update ID</b>.)</p>				
8	<p>After completing the update or insert, you will be returned to the key block of the %IDEN form to continue your data entry.</p> <p><u>Warning:</u> If you have not selected any matching options, you will be unable to perform a <b>Next Block</b> function to enter any data after returning to the %IDEN Form.</p>				



## Section C: Day-to-Day Operations

### Lesson: Querying Matching Sources

◀ Jump to TOC

#### Introduction

The Common Matching Source Search Form (GOICMSS) is a new query-only form that displays all Matching Sources using an element. This enables quick updating of rules.

#### Banner form



## Section C: Day-to-Day Operations

### Lesson: Querying Matching Sources (Continued)

◀ Jump to TOC

#### Procedure

Follow these steps to use the form.

Step	Action
1	Access the Common Matching Source Search Form (GOICMSS).
2	Select an element in the <b>Element</b> field.
3	Perform a Next Block function.  Common Matching sources relevant to your element will populate the fields.

Clicking the **Edit Rules** icon will access GORCMRL, where you can edit the rule set for the selected matching source. You may also access GORCMRL from the **Options** menu.



## Section C: Day-to-Day Operations

### Lesson: Common Matching and Batch Loads

◀ Jump to TOC

#### Introduction

Common Matching is used for batch processing when loading records to the database. Each batch process calls the Common Matching algorithm to determine if a record is New, Matched or a Potential Match.

The Common Matching Entry Form (GOAMTCH) will be used for reviewing records that are identified as potential matches or to assist with identifying new and matched records in the temporary tables.

When using one of the current forms for reviewing data loaded by a batch process, the Common Matching Entry Form (GOAMTCH) will be called and the Data Entry block will be populated with data from the temporary table to allow you to execute the Common Matching procedure (Duplicate Check) and review the results of the process.

#### Steps involved

The batch processes perform these steps based on the rules you set up for each data source.

1. Create or identify new records as necessary, depending on your process.
2. Match incoming records to existing Banner records.
3. Mark records as *SUSPENDED* (when there are potential matches). Use the existing Banner forms to match records or to resolve suspended records (e.g., use SAAEAPS to resolve Web Admissions applications). These forms now call GOAMTCH when you select the Match or Associate ID option

Incoming records are stored in temporary tables. When you use a form to match data loaded by a batch process, GOAMTCH is called. The Data Entry block of GOAMTCH will be populated with the information from the temporary tables.

You can perform a Next Block function to run the Common Matching algorithm, and, based on the results, you can determine if the record is new or if it is the match of an existing Banner record. You will then be returned to the calling form.

Note: For more information about using Common Matching with specific batch processes and the related data load review forms, please refer to the product-specific user guides.



## Section C: Day-to-Day Operations

### Lesson: Summary

◀ [Jump to TOC](#)

#### Let's review

As a result of completing this workbook, 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
- selected the type of records to compare for the Common Matching process
- defined default types for address, telephone, and email 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.



## Section C: Day-to-Day Operations

### Lesson: Self Check

◀ Jump to TOC

#### Directions

Use the information you have learned in this workbook to complete this self-check activity.

#### Question 1

When checking to see if a match exists, there are three possible results: New, Match, and Potential Match.

True or False

#### Question 2

The Common Matching Entry Form (GOAMTCH) can be called automatically when a user tries to create a record on %IDEN forms.

True or False

#### Question 3

While on Common Matching Entry Form (GOAMTCH), click the \_\_\_\_\_ button to view data about the potential match on other forms.

- a) Create New
- b) Details
- c) Select ID
- d) Update ID



## Section C: Day-to-Day Operations

### Lesson: Answer Key for Self Check

◀ Jump to TOC

#### Question 1

When checking to see if a match exists, there are three possible results: New, Match, and Potential Match.

**True**

#### Question 2

The Common Matching Entry Form (GOAMTCH) can be called automatically when a user tries to create a record on %IDEN forms.

**True**

#### Question 3

While on Common Matching Entry Form (GOAMTCH), click the \_\_\_\_\_ button to view data about the potential match on other forms.

- a) Create New
- b) Details**
- c) Select ID
- d) Update ID



## Section D: Reference

### Lesson: Overview

◀ [Jump to TOC](#)

#### **Introduction**

The purpose of this section is to provide reference materials related to Common Matching.

#### **Section contents**

Setup Forms and Where Used .....	47
Forms and Processes Used with Common Matching .....	48
Forms Job Aid .....	49



## Section D: Reference

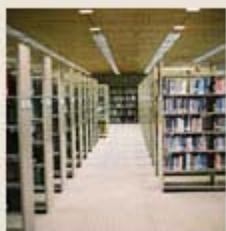
### Lesson: Setup Forms and Where Used

◀ Jump to TOC

#### Setup forms

All of the setup forms covered in this workbook are used by the Common Matching Entry Form (GOAMTCH). The table lists the setup forms.

<b>Form Description</b>	<b>Banner Name</b>
Common Matching Source Code Validation	GTVCMSC
Common Matching Source Search	GOICMSS
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



## Section D: Reference

### Lesson: Forms and Processes Used with Common Matching

◀ Jump to TOC

#### Data entry forms

Use this table as a guide to the data entry forms that work with Common Matching. These forms allow you to access the Common Matching Entry Form (GOAMTCH) during the data entry process.

Form Description	Banner Name
Advancement Identification	APAIDEN
Constituent/Organization Name	APANAME
Person Identification - Finance	FOAIDEN
Agency Code Maintenance	FTMAGCY
Financial Manager Maintenance	FTMFMGR
Vendor Maintenance	FTMVEND
Bank Code Rules	GXR BANK
One-Time Payment	PEA1PAY
New Hire	PEAHIRE
Identification	PPAIDEN
Quick Entry	SAAQUIK
General Person Identification	SPAIDEN
Quick Recruit	SRAQUIK

#### Batch processes

Use this table as a guide to the batch processes that work with Common Matching.

Process Description	Banner Name
Financial Aid Data Load Part 2	RCPMTCH
Electronic Application Verify/Load Process	SARETMT
Electronic Prospect Match	SRRSRIN

#### Batch process review forms

Use this table as a guide to the batch process review forms that work with Common Matching.

Process Description	Banner Name
Financial Aid Suspended Record Maintenance	RCRSUSP
Electronic Application Process	SAAEAPS
Online Transcripts Activity List	SHAEDIS
Electronic Prospect Inquiry	SRIPREL



## Section D: Reference

### Lesson: Forms Job Aid

◀ [Jump to TOC](#)

#### Purpose

Use this table as a guide to the forms used in Common Matching. Use the Owner column to designate the individual(s) responsible for maintaining a form.

<b>Form Name</b>	<b>Form Description</b>	<b>Owner</b>
GTVCMSC	Common Matching Source Code Validation	
GORCMSC	Common Matching Source Rules	
GORCMDD	Common Matching Data Dictionary	
GORNAME	Name Translation Rules	
GORNPNM	Non-Person Name Translation Rules	
GORCMRL	Common Matching Rules	
GORCMUS	Common Matching User Setup	
GUAINST	Installation Controls	
GOAMTCH	Common Matching Entry	
GOICMSS	Common Matching Source Search	



## Release Date

◀ [Jump to TOC](#)

This workbook was last updated on 6/1/2006.