

Banner General Common Matching Training Workbook

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Section A: Introduction

Lesson: Overview

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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

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Section A: Introduction

Lesson: Process Introduction

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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

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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

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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.

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Section B: Set Up

Lesson: Common Matching Source Code Validation

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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	Comment
103345	Defect test can i update this?	SYSTEST07	13-APR-2006	
105897	defect 105897	SYSTEST07	17-APR-2006	
ADVANCEMENT	Advancement Match Rule	SYSTEST10	10-NOV-2004	
ADVANCE_NON_PERSON	Advancement Non-Person Match	SYSTEST10	30-NOV-2004	
ADVANCE_PERSON	Advancement Person Match	SYSTEST10	30-NOV-2004	

Common Matching Source Code.
Record: 1/?

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)

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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 (GTVCMSVC).
2	Perform an Insert Record 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 Insert Record 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 Save icon.
10	Click the Exit icon.



Section B: Set Up

Lesson: Common Matching Source Rules

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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 7.4

Matching Source: ST_TRANSPOSED_DATE ST_TRANSPOSED_DATE

Options

Match Type: Person

☒ 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: []

Telephone: []

E-mail: []

☐ Create Hierarchy of Display using Defaults

User ID: CBUNTE Activity Date: 04-MAY-2006

Hierarchy of Display

Address	Telephone	E-mail
[]	[]	[]
[]	[]	[]
[]	[]	[]

Detail List

Object	Sequence	User ID	Activity Date
[]	[]	[]	[]
[]	[]	[]	[]
[]	[]	[]	[]

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)

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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 5th and May 1st.
- **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		
Address	Telephone	E-mail
<div><input type="checkbox"/> MA Mailing</div> <div><input type="checkbox"/> DA Dormitory</div> <div><input type="checkbox"/> BI Billing</div>	<div><input type="checkbox"/> MA Mailing</div> <div><input type="checkbox"/> RH Residence Hall</div> <div><input type="checkbox"/> BI Billing</div>	<div><input type="checkbox"/> HOME Home</div> <div><input type="checkbox"/> SCHL School</div> <div><input type="checkbox"/> BUSI Business</div>

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)

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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 (GTVCMSVC).

Step	Action
1	Access the Common Matching Source Rules Form (GORCMSC).
2	Using the Matching Source field, select the matching source code you created on the Common Matching Source Code Validation Form (GTVCMSVC).
3	Enter an address type code in the Address Type field. <u>Note:</u> Setting up default types for address, telephone, and email records is optional.
4	Enter a telephone type code in the Telephone Type field.
5	Enter an e-mail type code in the E-mail Type field.
6	Check the Use for Online Common Matching 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 Match Type field to specify that this code will be used to match on persons, non-persons, or both. Select <i>Person</i> .
8	Click the Save icon.
9	Perform a Next Block 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 Object field.
11	Enter 1 in the Sequence field.
12	Enter GOAEMAL in the Object field.
13	Enter 2 in the Sequence field.
14	Click the Save icon.
15	Click the Exit icon.



Section B: Set Up

Lesson: Common Matching Data Dictionary

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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

Common Matching Data Dictionary GORCMDD 7.3 (s7s70)									
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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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

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)

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Fields

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

Field	Description
Length Updateable	If checked, indicates that the user can define the number of characters to be used in matching, up to the maximum length specified.
Allow Negative Length	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
Online Indicator	If checked, designates the data element is available on the Common Matching Entry Form for use with online matching.
Core Matching Element	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 Insert Record function.
3	Enter <i>SPBPERS</i> in the Base Table field.
4	Enter <i>SPBPERS_VETC_FILE_NUMBER</i> in the Column field.
5	Enter <i>Veteran File number</i> in the Element field.
6	Enter 10 in the Maximum Length field.
7	Select the Allow Negative Length checkbox. <u>Note:</u> The Allow Negative Length checkbox must be selected to match the characters from the end of the field.
8	Leave the Online Indicator unchecked.
9	Click the Save icon.
10	Click the Exit icon.



Section B: Set Up

Lesson: Name Translation Rules

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Purpose

The Name Translation Rules Form (GORNAME) allows you to associate aliases for person names. This form can be used for first and middle names and is delivered with data for common names.

Note: Alias matching works both ways. For example, there is no need to enter “Elizabeth = Liz” and “Liz = Elizabeth” as separate rules.

Banner form

Name Translation Rules GORNAME 7.0 (s7s70)

Name	Alias	User ID	Activity Date
ABIGAIL	ABBIE	GENERAL	09-DEC-2004
ABIGAIL	ABBY	GENERAL	09-DEC-2004
AL	ALFRED	SYSTEST17	04-MAY-2005
AL	ALLEN	SYSTEST17	04-MAY-2005
ANDY	ANDREW	SYSTEST17	02-MAY-2005
ANTHONY	TONY	GENERAL	09-DEC-2004
BARBARA	BARB	GENERAL	09-DEC-2004
BENJAMIN	BEN	GENERAL	09-DEC-2004
BEVERLY	BEV	GENERAL	09-DEC-2004
BRADLEY	BRAD	GENERAL	09-DEC-2004
CALVIN	CAL	GENERAL	09-DEC-2004
CATHERINE	CATHY	GENERAL	09-DEC-2004
CHARLES	CHARLIE	GENERAL	09-DEC-2004
CHARLES	CHUCK	GENERAL	09-DEC-2004
CHRISTOPHER	CHRIS	GENERAL	09-DEC-2004
CINDY	CYNDY	SYSTEST07	27-APR-2006
DANIEL	DAN	GENERAL	09-DEC-2004
DANIEL	DANNY	GENERAL	09-DEC-2004
EDWARD	ED	GENERAL	09-DEC-2004
ELIZABETH	BETH	DMCGARRY	09-DEC-2004
ELIZABETH	BETTE	DMCGARRY	09-DEC-2004
ELIZABETH	BETTY	DMCGARRY	09-DEC-2004
ELIZABETH	LIZ	DMCGARRY	09-DEC-2004

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



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 Insert Record function.
3	Enter the person name in the Name field.
4	Enter the alias in the Alias field.
5	Click the Save 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 Exit icon.

Section B: Set Up

Lesson: Non-Person Name Translation Rules

◀ [Jump to TOC](#)

Purpose

The Non-Person Name Translation Rules Form (GORNPNM) allows you to associate aliases with non-person names.

Examples:

- IBM = International Business Machines
- FedEx = Federal Express

Note: There is no seed data delivered with this form.

Banner form

[illegible]



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 Insert Record function.
3	Enter the non-person name.
4	Enter the alias.
5	Click the Save 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 Exit 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 7.4

Matching Source: ST_TRANSPOSED_DATE
Comment: ST_TRANSPOSED_DATE

Rule Set
Priority: 1
Description: CBUNTE
User ID: CBUNTE
Activity Date: 04-MAY-2006
Rule Set Comment:

Create Comments from Matching Rules Insert Core Matching Elements

Matching Rules (3) Copy To (2) Matching Procedures (0)

Column	Element	Length	Match on Null Data	User ID	Activity Date
SPBPERS_BIRTH_DATE	BIRTH DATE	8	<input checked="" type="radio"/> Yes <input type="radio"/> No	CBUNTE	04-MAY-2006
SPBPERS_SSN	SSN/SIN/TIN	9	<input type="radio"/> Yes <input checked="" type="radio"/> No	CBUNTE	04-MAY-2006
SPRIDEN_SEARCH_LAST_NAME	LAST NAME/NON-PERSON NAME	60	<input type="radio"/> Yes <input checked="" type="radio"/> No	CBUNTE	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		
			<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 Matching Source field.
3	Perform a Next Block function.
4	Enter a priority in the Priority field.
5	Enter a description of the rule in the Description field.
6	Click the Save icon.
7	Click the Insert Core Matching Elements 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"> • SPBPERS_SSN • SPRIDEN_SEARCH_FIRST_NAME • SPRADDR_ZIP
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 Match on Null Data indicator for SPBPERS_SSN to <i>YES</i> .
13	Click the Save icon and proceed to the next exercise.



Section B: Set Up

Lesson: Common Matching Rules (Continued)

◀ [Jump to TOC](#)

Procedure: Entering a new priority

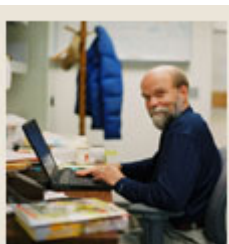
Follow these steps to enter a new priority and copy the rule you just created to that priority.

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

Common Matching User Setup GORCMUS 7.2 (s7s70)

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

7.5 enhancement

This form, which maintains basic options settings for a Banner installation, has a new field that turns on and off the SSN search feature for all Banner users.

Note: When the SSN search feature is enabled it will be enabled only for those users who have security access to the SSN_SEARCH security object.



Section B: Set Up

Lesson: Installation Controls (Continued)

◀ Jump to TOC

Banner form

Installation Controls GUAINST 7.5

Name: <input type="text" value="BANNER University"/> Address: <input type="text" value="Systems & Computer Technology"/> <input type="text" value="Four Country View Road"/> <input type="text" value="Great Valley Corporate Center"/> <input type="text" value="Malvern"/> <input type="text" value="PA"/> <input type="text" value="19355"/> Nation: <input type="text" value="157"/> <input type="text" value="United States of America"/> Phone: <input type="text" value="215"/> <input type="text" value="6475930"/> <input type="text"/> Operating/System: <input type="text" value="UNIX"/> Installation Type: <input type="text" value="Higher Education"/> Instance Name: <input type="text" value="s4b70"/> Activity Date: <input type="text" value="01-NOV-2007"/>	ZIP/Postal Code Length: <input type="text"/> Base Currency: <input type="text" value="USD"/> <input type="text" value="United States Dollar"/> Maximum Number of Open Forms: <input type="text"/> Century Pivot: <input type="text" value="49"/> Default Date Format: <input checked="" type="radio"/> MDY <input type="radio"/> DMY <input type="radio"/> YMD System/Process Enable Indicators: <input checked="" type="checkbox"/> Online Matching Process Enabled <input checked="" type="checkbox"/> Workflow Enabled <input checked="" type="checkbox"/> SQL Trace Enabled <input type="checkbox"/> Messaging Enabled <input checked="" type="checkbox"/> SSN/SIN/TIN Search Enabled
---	---

Installation Information		
	Release	Date
<input checked="" type="checkbox"/> Advancement	<input type="text" value="7.5"/>	<input type="text" value="30-AUG-2007"/>
<input checked="" type="checkbox"/> Accounts Receivable	<input type="text" value="7.2"/>	<input type="text" value="07-NOV-2005"/>
<input checked="" type="checkbox"/> Financial Aid	<input type="text" value="7.0"/>	<input type="text" value="31-AUG-2004"/>
<input type="checkbox"/> Other Financial Aid		
<input checked="" type="checkbox"/> General	<input type="text" value="7.4.1"/>	<input type="text" value="04-MAR-2007"/>

	Release	Date
<input checked="" type="checkbox"/> Finance	<input type="text" value="7.2"/>	<input type="text" value="18-JAN-2007"/>
<input checked="" type="checkbox"/> Human Resources	<input type="text" value="7.2.2"/>	<input type="text" value="15-DEC-2006"/>
<input checked="" type="checkbox"/> Position Control	<input type="text" value="7.1"/>	<input type="text" value="06-JUN-2005"/>
<input checked="" type="checkbox"/> Student	<input type="text" value="7.3"/>	<input type="text" value="02-JUN-2006"/>

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

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 Online Matching Process Enabled checkbox to enable Common Matching.
4	Click the Save icon.
5	Click the Exit 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 (GTVCMSC)

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

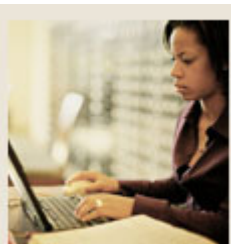
Use this form to create the matching rules and assign the specific database values which each rule will use in the matching algorithm and to assign a priority to each rule.

- 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

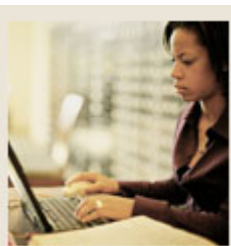
- execute the Common Matching algorithm when creating persons and non-persons
- identify the results of the Common Matching process.

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.

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Common Matching and Batch Loads	42
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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

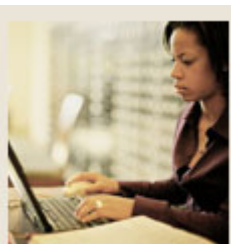
There are three possible results of running the Common Matching algorithm:

- 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 7.4

ID: Generate ID Matching Source: Sue online source 1 View Comments

Data Entry

Last Name:
First Name:
Middle Name:
Address Type:
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:
Telephone Type:
Telephone: -
E-mail Type:
E-mail:

Duplicate Check Details View Comments
Select ID Update ID Create New

Match **Potential Matches**

ID	Name	Matched Address	Telephone	E-mail
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	SSN/SIN/TIN	<input type="text"/>		
	Birth Date	<input type="text"/>		
	Gender	<input type="text"/>		
		<input type="text"/>		
		<input type="text"/>		
		<input type="text"/>		

Clear and Return to Data Entry

Matching Rule Sets

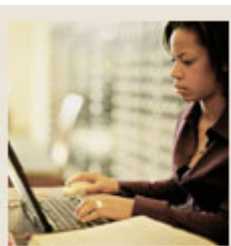
No Matches

All Addresses All Telephones All E-mails

ID to match.
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:

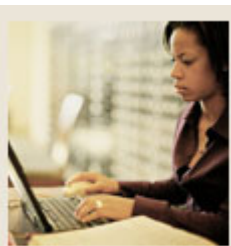
- The **View Comments** function allows users to view matching source and rules comments.
- **Last Name** is not required; matches can be made solely on SSN. (This is not recommended for batch processes.)
- The form can auto-fill the **City** and **State or Province** fields based on a **ZIP or Postal 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.

7.5 Enhancement

This form was modified to support the SSN search feature. If the SSN search feature is enabled at the Institution level (through GUAINST), and an existing SSN is entered in the **ID** field on GOAMTCH, the form will not allow you to use the SSN value to create a new ID.



Section C: Day-to-Day Operations

Lesson: Using Common Matching (Continued)

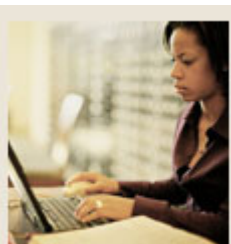
◀ Jump to TOC

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	<p>Access the data entry form to enter person or non-person data.</p> <p><u>Example:</u> General Person Identification Form (SPAIDEN)</p> <p><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.</p>
2	<p>Enter the ID of the person to be created or click the Generated icon to generate an ID.</p> <p><u>Note:</u> You can choose to select GOAMTCH from the Options menu at this point.</p>
3	<p>Perform a Next Block function.</p> <p><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 ID field.</p>
4	<p>If necessary, choose a source code for the Matching Source field.</p> <p><u>Note:</u> This may default in, depending on the setup on GORCMUS.</p>



Section C: Day-to-Day Operations

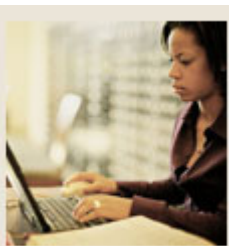
Lesson: Using Common Matching (Continued)

◀ [Jump to TOC](#)

Procedure, continued

Step	Action
5	Perform a Next Block 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 Duplicate Check icon or perform a Next Block 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 Match tab. The Potential Match tab will only be available if other potential matches are found.

IF the result is...	THEN
New	Click the Yes 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"> • Select ID to select the record and carry it back to the key block of the %IDEN form. • Update ID to update the record with data from top block. Clicking Update ID will update the following data, if it has been entered in the Data Entry block: <ul style="list-style-type: none"> • SSN/SIN/TIN if it is null in Banner • Date of Birth if it is null in Banner • Gender if it is Unknown in Banner • Address, telephone, and e-mail if the type does not exist for the record. A new sequence for the address will be created if the same type exists but address information is different.



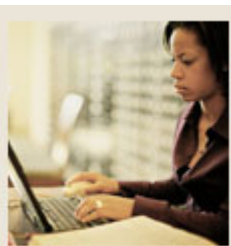
Section C: Day-to-Day Operations

Lesson: Using Common Matching (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action	
	IF the result is...	THEN
	Potential Match	<p>Click the Potential Match tab. Review the data for each potential match.</p> <p>Click the Details 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. (Create New or Select ID or Update ID.)</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 Next Block 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.

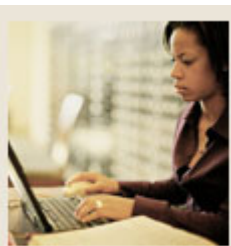
Banner form

Common Matching Source Search GOICMSS 7.3 (57570)

Element: Last Name/Non-Person Name SPRIDEN_SEARCH_LAST_NAME

Common Matching Sources						
Source:	ADVANCEMENT	Advancement Match Rule	Rule Set:	1	Length:	60
			Match on Null Data:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Edit Rules	User ID: SYSTEST31
						Activity Date: 19-APR-2005
Source:	ADVANCEMENT	Advancement Match Rule	Rule Set:	2	Length:	20
			Match on Null Data:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Edit Rules	User ID: SYSTEST10
						Activity Date: 30-NOV-2004
Source:	ADVANCEMENT	Advancement Match Rule	Rule Set:	3	Length:	10
			Match on Null Data:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Edit Rules	User ID: SYSTEST10
						Activity Date: 30-NOV-2004
Source:	ADVANCEMENT	Advancement Match Rule	Rule Set:	4	Length:	10
			Match on Null Data:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Edit Rules	User ID: SYSTEST10
						Activity Date: 30-NOV-2004
Source:	ADVANCEMENT	Advancement Match Rule	Rule Set:	5	Length:	10
			Match on Null Data:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Edit Rules	User ID: SYSTEST10
						Activity Date: 30-NOV-2004
Source:	ADVANCE_NON_PERSON	Advancement Non-Person Match	Rule Set:	1	Length:	60
			Match on Null Data:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Edit Rules	User ID: SYSTEST10
						Activity Date: 30-NOV-2004
Source:	ADVANCE_NON_PERSON	Advancement Non-Person Match	Rule Set:	2	Length:	20
			Match on Null Data:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Edit Rules	User ID: SYSTEST10
						Activity Date: 30-NOV-2004

Common Matching Source
Record: 7/? ... <OSC>



Section C: Day-to-Day Operations

Lesson: Querying Matching Sources (Continued)

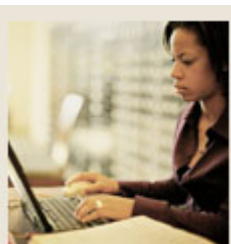
◀ Jump to TOC

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 Element 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

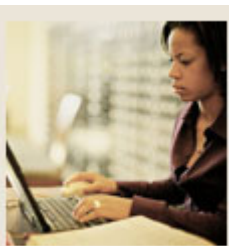
Lesson: Summary

◀ [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

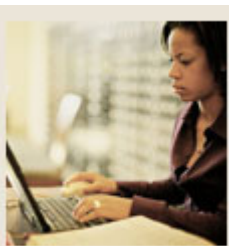
The Common Matching Entry Form (GOAMTCH) can be called automatically when a user tries to create a record on %IDEN forms.

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.

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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.

Form Description	Banner Name
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.

Form Name	Form Description	Owner
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 11/7/2007.