

Introduction to Common Matching

One Common Matching rule has been set up in Banner for Human Resources called PERSON_MATCH. PERSON_MATCH is only for matching persons.

FAQs

What is Common Matching?

Common Matching is a Banner process that checks for existing records when creating a new record in the system.

When should Common Matching be used?

Common Matching should be used when creating a new record in any module in Banner. The process should be employed specifically when the data entry person is positive that the person of interest does not already have a record in the system and believes a new record needs to be created.

What are Common Matching forms in Banner?

GTVCMSC: Common Matching Source Code Validation
GORCMSC: Common Matching Source Rules
GORCMRL: Common Matching Rules
GORNAME: Name Translation Rules
GORNPNM: Non-Person Name Translation Rules
GORCMUS: Common Matching User Setup
GUAINST: Installation Controls (enable Common Matching for all users)
GOAMTCH: Common Matching Entry

What elements does Common Matching match on?

Common Matching can match on a variety of specified demographic and geographic fields in Banner. These fields are specified in “rules” for a set user population. The number of rules that can be created is virtually limitless. All rules must contain at least one core element: last name or Social Security Number. Common Matching first searches on core elements and then further refines the number of potential records based on additional elements.

In addition to identifying the core and additional elements for matching, rules can also specify the length, null status and type of elements used for matching. Length is specified in number of characters—spaces and dashes are considered characters. Rules may specify to either match or not match on null fields (null status). Type of element may be specified for specific fields, such as type of address or phone number (AP, PR, etc.). For example, a rule may specify to match on “first name,” (Element = First Name) looking only at the first five characters of the field (Length = 5) and considering a null field to be a match (Match on Null = Yes).

For PERSON_MATCH, the matching elements include:

Element	Length	Match on Null?
Social Security Number	9	Yes
Last Name	5	No
First Name	5	Yes
Date of Birth (MM/DD/YYYY)	8	Yes
Street Line 1 (PR)	30	Yes
Telephone Area Code (PR)	3	Yes
Telephone Number (PR)	7	Yes


On the tabs that display Match and Potential Matches on GOAMTCH, the addresses that display in “Matched or Hierarchal Address” and the telephone numbers that display in “Telephone” have been assigned a hierarchy; therefore, when performing a Duplicate Check for a person in GOAMTCH, only one address and one phone number will display under these fields for a Match or Potential Match. The hierarchy is as follows:

PERSON_MATCH Address Hierarchy:


PR Address Available?	LO Address Available?	MA Address Available?	Address Displayed on GOAMTCH
Y			PR Address
N	Y		LO Address
N	N	Y	MA Address

Common Matching: PERSON_MATCH

What are the commonly used buttons on GOAMTCH?

Matching Source:  Person entry for Accounting


Matching Source Field with Dropdown Arrow: the Matching Source field with dropdown arrow is used to select a particular Common Matching Rule.

Generate ID 


Generate ID button: the General ID button is used to generate or create a new ID in Banner.




Next Block button: the Next Block button will move the cursor into and allow for entry into the next block or section of the form.

Duplicate Check 

Duplicate Check button: the Duplicate Check button initiates the Common Matching duplicate check process, in which information entered in Data Entry fields is matched against fields in existing records.

Select ID 

Select ID button: the Select ID button selects the highlighted ID so that it can be copied and carried over into other forms.

Create New 

Create New button: the Create New button is used to create a new record using the information entered in Data Entry fields on the GOAMTCH form.




Update ID button: the Update ID button is used to update the selected ID record with information entered in Data Entry fields on the GOAMTCH form.

How do you use Common Matching?

- 1) Log into Banner.
- 2) Perform a manual search for the person.

Person manual search:

- 2.1) Go to SOAIDEN.
- 2.2) Under the “Last Name” and/or “First Name” field(s), enter the person last name and/or first name or a portion of the person last name and/or first name using “%” as a wildcard. *For example, try typing in “%davi%” under the “Last Name” field.*
- 2.3) Execute the query by clicking on the  icon in the toolbar or by clicking on “Query,” then “Execute.” *For our example, all persons with “davi” in their last name will appear. If the desired person name appears, proceed to Step 2.4. If the desired non-person name does not appear, proceed to Step 3.*
- 2.4) If the desired person name appears,5993939393y

Continue with data entry on desired form, such as PPAIDEN. **(End of Matching)**

- c. Potential Match, (1) highlight correct record in “Potential Match” tab and then click “Select ID” button. *Optional, click “Update ID” button to update selected record with information entered into GOAMTCH form.* (2) Click “Create New” button. Continue with data entry on desired form, such as PPAIDEN. **(End of Matching)**