Common Matching

Banner 8 User Guide

January 2011

REGISTRY SYSTEMS

Common Matching

Contents

Refer to this tutorial to learn how to use Common Matching form **GOAMTCH** to run Duplicate Checking when creating a General Person (or Non-Person) in Banner.

Banner forms:

FORM	FUNCTION
GOAMTCH	**Common Matching Form** Used to check for duplicate person records.

Pre-requisites to this tutorial:

- Name and Personal Details for the Person(s) for whom you are checking for a match.

1. OVERVIEW OF COMMON MATCHING

The aim of Common Matching is to reduce the amount of duplicate General Person records in Banner and to ensure each person has just one Banner ID.

When you want to create a new General Person (as a Recruit, Applicant, Student or Member of Staff) Common Matching checks if they already exist in Banner.

- If Yes, you should select and update the existing General Person record.
- If No, Banner creates a new General Person record with a new ID.

The user has **_full control_** over this decision.

Common Matching uses sets of rules (written by RHUL) to check for duplicates.

Example of a Rule:
Match using the first 3 letters of the first name, the first 5 letters of the last name, and the date of birth _or_ the postcode.
There are different sets of rules (called "matching sources") for different circumstances and departments (see Appendix 1).

Common Matching has 3 possible results:

- **Exact Match**: the data entered definitely matches an existing Banner person (based on the rules).

- **New**: the data entered definitely does not exist in Banner.

- **Potential** (or Suspend): the data entered _potentially_ matches existing Banner person(s) i.e. some fields match, _or_ there is more than one exact match.
  (E.g. prospect Tom Smith, DoB 14/03/85, city Sheffield, is a potential duplicate of existing Banner person Tom Smith, DoB 14/03/85, city London – are they the same person?).

  With the proposed rules, if the person has the same last and first name as a Banner ID, it will find at least _a potential match._

2. USING GOAMTCH TO RUN COMMON MATCHING

You will already have arrived in **GOAMTCH** from **SPAIDEN**, **SAAQUIK** or **SRIPREL**.

1.1. In the Key Block click the drop-down arrow (Figure 1, Box 1) to select an appropriate **Matching Source** (Figure 1, Box 2) to use for the search (See Appendix 1). If creating a Non-Person select the Non-Person source.
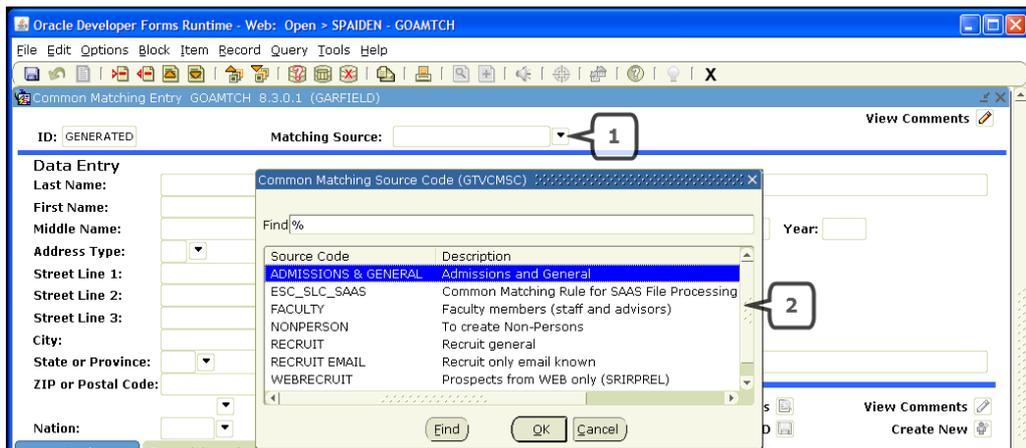
Figure 1

1.2. *Block Down* and enter the First and Last Name (users coming from **SRIPREL** will have this information populated automatically).

<u>Notes</u>:
- Do not enter any wildcard characters in the fields as **GOAMTCH** automatically does a wildcard search e.g. if you enter 'Jo' it will find 'Jonathan', 'John', 'Josephine', etc.
- You must enter at least the first letter of the first name, or Banner will not find any results for the surname.
- Matching checks for transposed first and last names, e.g. if you enter John Lee, and Banner contains a 'Lee John', then Lee John will be in the Potential Matches list.
- **Do not try to enter all of the person's information (e.g. full address) because you will be taken to SPAIDEN to complete this after the matching process.**

1.3. Click *Duplicate Check* (Figure 2, Box 1) or press F10 to run Common Matching using the search criteria you entered.
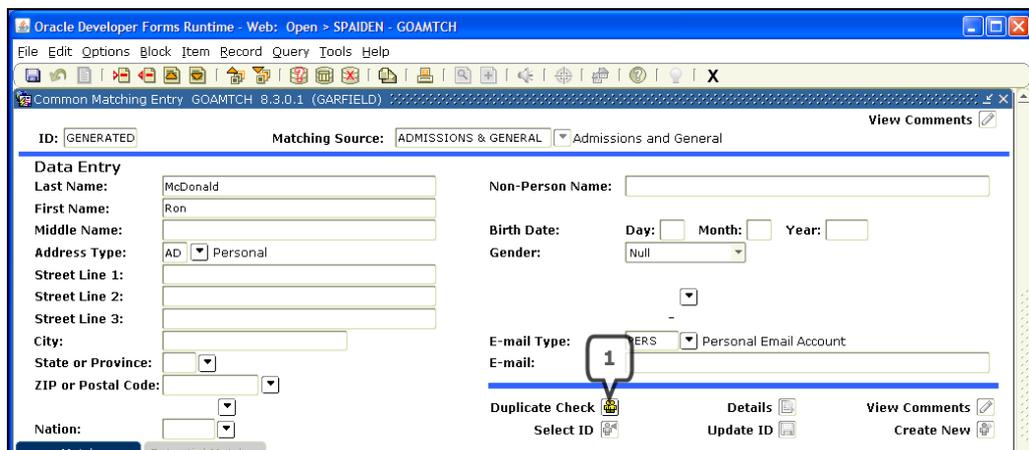

Figure 2

1.4. If a window with the message "No matches found, create as new?" appears (Figure 3) the rules cannot find any match, either exact or potential. *Click* Yes and go to step 1.8.
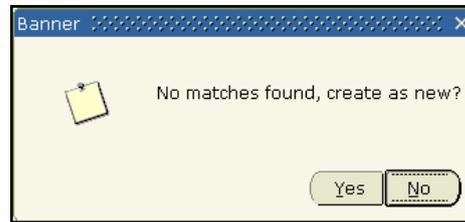

Figure 3

1.5. If the Common Matching rules find an 'Exact Match', information is displayed in the **Match** tab (Figure 4, Box 1).

Notes:
- This **does not guarantee** that the Banner ID is actually the same person; just that the rules being used find a match.
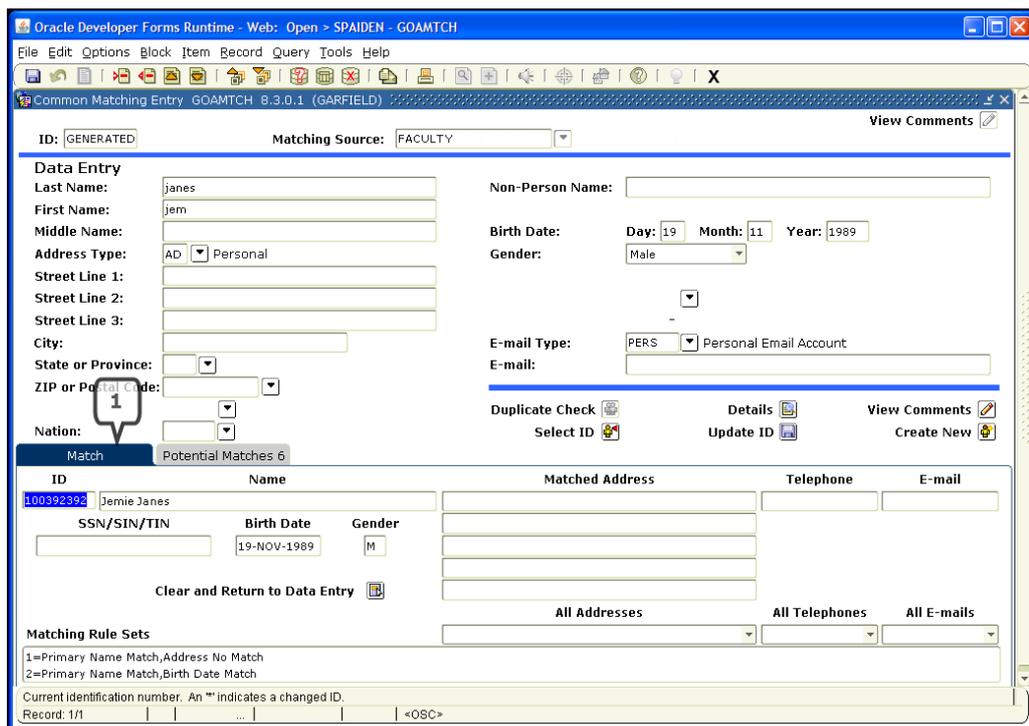- The information in the Match tab **must be checked –** see step 1.7.

Figure 4

1.6. If Common Matching finds one or more Potential matches (or more than 1 Exact match), their Banner IDs and data are displayed in the **Potential Matches** tab (Figure 5, Box 1).

Potential Matches are **NOT** displayed in 'best fit' order, so scroll down to check all the suggestions. An exact match might be the last ID listed.
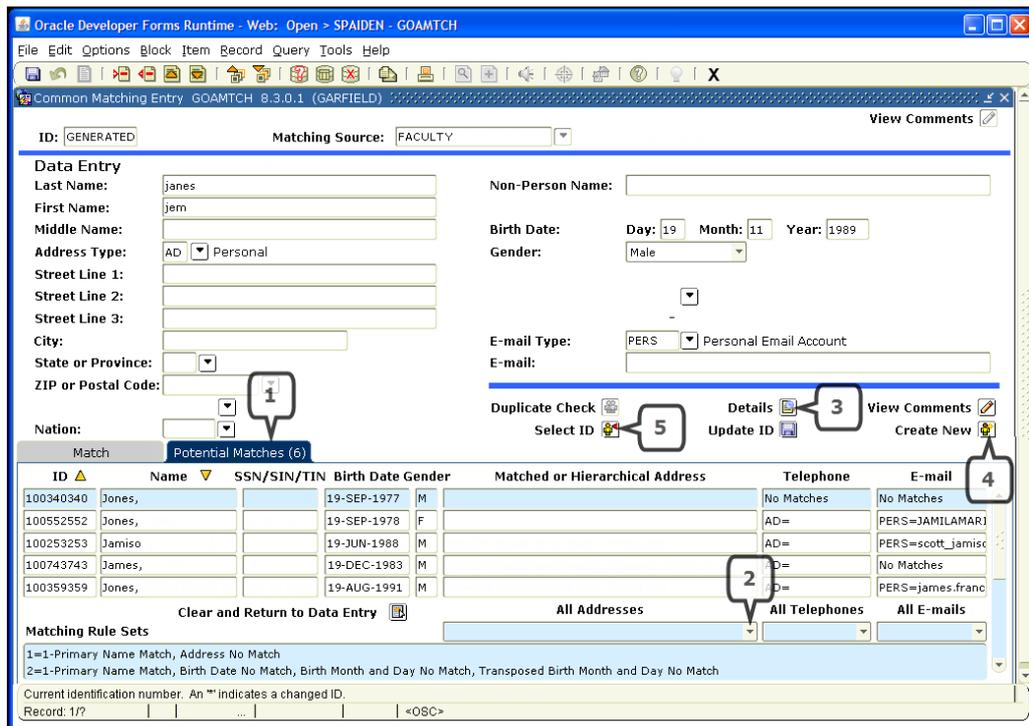
Figure 5

Note:

An asterisk next to a name or address (in Potential Matches) means it is a previous or overwritten name or address, so click 'Details' then 'General Person Identification' to check the Alternate Name and Address details in SPAIDEN.

1.7.   You will need to decide if any of the suggested exact or potential matches are indeed the person you are trying to create.

If you want to investigate further you can highlight (single-click) an ID in the Match or Potential Match tab, then do one or more of the following:

- Click the drop-down arrow next to 'All Addresses' (Figure 5, Box 2) to view all addresses for that person. The same function is available for 'All Telephones' (This is the only way to view a person's telephone on this form) or 'All Emails' to display relevant data for that person.

- Click the *Details* icon (Figure 5, Box 3). This displays a list of useful forms e.g. Faculty / Advisor Information. Click on the description to access the form and get more information about the suggested duplicate. Close the form to return to **GOAMTCH**.

If you decide the person you are trying to create does not match any ID in Match or Potential Matches tab, select the *Create New* icon (Figure 5, Box 4). This will create a new Banner ID and General Person Record.

If you decide that the data does match one of the IDs in Match or Potential

Matches, highlight that ID (single-click) then click the *Select ID* icon (Figure 5, Box 5) which will take you back into the form you came from.

1.8. Following clicking 'Yes' to Create New a message window is displayed describing the results (based on data entered in GOAMTCH; Figure 6). Click 'OK' to return to the previous form.
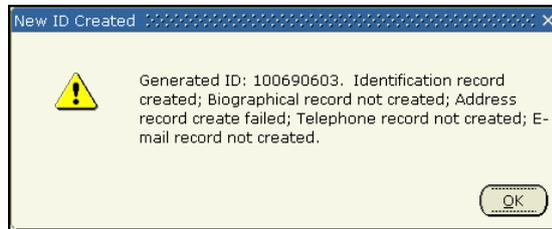

New ID Created ✕

⚠ Generated ID: 100690603. Identification record
created; Biographical record not created; Address
record create failed; Telephone record not created; E-
mail record not created.

OK

Figure 6

1.9. If you chose 'Create New', enter all known data in **SPAIDEN** or **SAAQUIK**.

1.10. If you chose 'Select ID', check and update the existing ID so it has the latest known/correct data e.g.
   - New or corrected address(es).
   - Telephone number(s) as International Access number.
   - Email address
   - Middle name.
   - Date of birth and gender.

2. USEFUL INFORMATION AND TIPS

There are other documents that explain in detail how the rules work, and Decision Documents that explain the rules behind each matching source code (ask if interested). The mechanism behind the rules is complex and *not* intuitive.

   - The rules state **how many characters** are matched e.g. if it's the first 3 characters of 'first name', entering 'Samuel' will find 'Samantha'. If it's the first 5 characters of the last name, entering 'Smithson' would find 'Smith-Jones'.

   - A Banner ID will not be flagged as a match unless it passes both the first and last name rules. So **if you get the names wrong**, no matches will be found, even if the date of birth is the same. (This is one reason why it's worth checking with initials, especially if you think the person might already exist in Banner).

   - Be careful if Common Matching suggests a **Staff** or **Faculty** member as a match, because Faculty ID's are sometimes set up with only the First & Last Names and no birthdate/address data. Do not *assume* that the new person is a match; else you could be matching a Recruit or Applicant with a Member of Staff.

   - The **alias** (nickname) file is always checked e.g. entering David will match Dave, Margaret will match Maggie and Claire will match Clare. You can ask for new

nicknames/alternate spellings to be added to the file.

- The rules **transpose** the first and last names e.g. John Lee will match to Banner ID Lee John. **But do not** 'Create New' if you entered the names the wrong way round.

- Banner removes **special characters** (outside 1-9, A-Z range) before searching e.g. 'Sarah Jane' is matched with 'Sarah-Jane', 'Flat #1' is matched with 'Flat 1'.

- If it matches a person's **previous/alternate** name or address, an asterisk ***** appears on the 'Match' tab. An asterisk may also indicate a **Duplicate** ID that should not be updated.

- If the message shown below appears, (which is caused by the rule sequencing), just click OK and check the potential matches in the usual way.
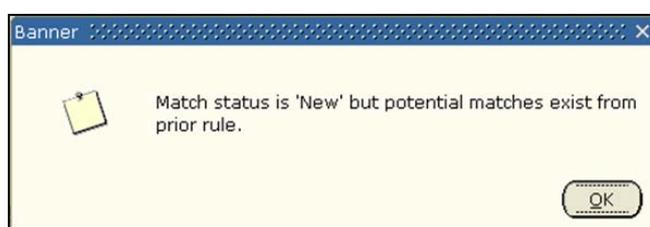
- The **count** after **"Potential Matches"** can be inaccurate so should be ignored. If the Potential matches tab is blank or looks wrong, click on Match tab then reclick on Potential match tab.

- Existing **addresses** in Banner do not always follow the address standards e.g. the postal town is not always in the *City* field. You can try to use address fields to match, but it is not reliable.

3. APPENDIX A: MATCHING SOURCES

(Documents are available to explain the matching rules for each source code.)

Admissions & General	Suitable for most purposes. Creates an 'AD' type address and 'PERS' email. Finds a potential match if the 1st few characters of both names match.
Recruit Email	Suitable for creating a Recruit when only name and Email address are known.
Recruit General	Same rules as Admissions and General, but creates 'RE' address and 'RECR' Email.
Web Recruit	Used for background web prospect matching. Much stricter rules.
Faculty	Just matches on name, for creating Faculty Members

4. APPENDIX B: ADDRESS FORMAT

There are two formats: British or Abroad. The below tables are a guide to which fields to use and how to use them.

British:

ADDRESS FIELD	DATA TO ENTER	FORMAT
Street Line 1	House Number/Name and Street	Title Case
Street Line 2	As Appropriate	Title Case
Street Line 3	Village/Town/City (if different to postal town)	Title Case
City	Postal Town ONLY	Title Case
State/Prove	LEAVE BLANK	N/A
ZIP/Post Code	Postcode ONLY	UPPER CASE
County	LEAVE BLANK	N/A
Nation	Nation = UK (or Channel Islands/ IOM as appropriate)	Pick from list

Abroad:

ADDRESS FIELD	DATA TO ENTER	FORMAT
Street Line 1	House Name /House Number and Street	Title Case
Street Line 2	Street no (if not line 1)	Title Case
Street Line 3	Village/Town/City (if different to postal town)	Title Case
City	Postal Town ONLY	Title Case
State/Prove	As Appropriate	Title Case
ZIP/Post Code	As Appropriate	As Appropriate
County	As Appropriate	Title Case
Nation	As Appropriate (the nation of the address *not* the prospect's nationality).	Pick from list