

Introduction to Common Matching

Two Common Matching rules have been set up in Banner for Grant and Contract Accounting called PERSON_MATCH and NON-PERSON_MATCH. PERSON_MATCH is only for matching persons. NON-PERSON_MATCH is only for matching non-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

For NON-PERSON_MATCH, the matching elements include:

Element	Length	Match on Null?
Non-person Name	4	Yes
Street Line 1 (AP)	30	Yes
Telephone Area Code (AP)	3	Yes
Telephone Number (AP)	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

PERSON_MATCH Phone# Hierarchy:

PR Phone# Available?	EVE Phone# Available?	DAY Phone# Available?	Campus Phone# Available?
Y			PR Phone#
N	Y		EVE Phone#
N	N	Y	DAY Phone#

NON-PERSON_MATCH Address Hierarchy:

AP Address Available?	PO Address Available?	Address Displayed on GOAMTCH
Y		AP Address
N	Y	PO Address

NON-PERSON_MATCH Phone# Hierarchy:

AP Phone# Available?	PO Phone# Available?	Phone# Displayed on GOAMTCH
Y		AP Phone#
N	Y	PO Phone#

You may view additional addresses and telephone numbers by clicking on the arrow next to “All Addresses” and “All Telephones” for the highlighted record. The “All Addresses” and “All Telephones” fields are located just below the Matched or Potential Matched lines.

What are the possible results on GOAMTCH?

There are three possible results from a Common Matching duplicate search: New, Match and Potential Match.

New: No match found in Banner. New record can be created with information entered into GOAMTCH; Banner will assign a new PIDM.


Match: All or a portion of the information of the information entered in GOAMTCH matches information on an existing record. By double clicking on the Matched record, data can be entered into that existing record. Or, a new record may be created.

Potential Match: All or a portion of the information of the information entered in GOAMTCH matches information on several existing records. By double clicking on the one of the Potential Match records, data can be entered into that existing record. Or, a new record may be created.

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 

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 or non-person.

Non-person manual search:

- 2.1.1) Go to FOICOMP.
- 2.1.2) Under the “Name” field, enter the non-person name or a portion of the non-person name using “%” as a wildcard. *For example, try typing in “%office%” under the “Name” field.*
- 2.1.3) Execute the query by clicking on the  icon from the toolbar or by clicking on “Query,” then “Execute.” *For our example, all non-persons with “office” in their name will appear. If the desired non-person name appears, proceed to Step 2.1.4. If the desired non-person name does not appear, proceed to Step 3.*
- 2.1.4) If the desired non-person name appears, double-click on the desired non-person name ID so that the entire ID is highlighted.
- 2.1.5) Click “Edit.”
- 2.1.6) Click “Copy.”
- 2.1.7) Proceed to the desired form for entry, such as FTMAGCY.
- 2.1.8) Click on the “Vendor” field.
- 2.1.9) Click “Edit.”
- 2.1.10) Click “Paste.”
- 2.1.11) Verify that the desired non-person is listed in the “Corporation” field. If the desired non-person name is listed in the “Corporation” field, proceed with data entry. **(End of Matching)** If the desired non-person is not listed in the “Corporation” field, go back to Step 2.1.1.

Person manual search:

- 2.2.1) Go to FOIIDEN.
- 2.2.2) 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.*
- 2.2.3) 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 2.2.4. If the desired non-person name does not appear, proceed to Step 3.*
- 2.2.4) If the desired person name appears, double-click on the desired person name ID so that the entire ID is highlighted.
- 2.2.5) Click “Edit.”
- 2.2.6) Click “Copy.”
- 2.2.7) Proceed to the desired form for entry, such as FTMAGCY.
- 2.2.8) Click on the “Vendor” field.

- 2.2.9) Click “Edit.”
 - 2.2.10) Click “Paste.”
 - 2.2.11) Verify that the desired person is listed in the “Last Name” and “First Name” fields. If the desired person name is listed in the “Last Name” and “First Name” fields, proceed with data entry.
(End of Matching) If the desired person is not listed in the “Last Name” and “First Name” fields, go back to Step 2.2.1.
- 3) Go to FTMAGCY.
 - 4) Click the  icon from the toolbar. The GOAMTCH form will automatically appear.
 - 5) If you are creating a non-person record, proceed to Step 8. If you are creating a person record, click on dropdown arrow next to the “Matching Source” field.
 - 6) Select “PERSON_MATCH” from the dropdown list.
 - 7) Click “OK.”
 - 8) Click the “Generate ID” button.
 - 9) Click the “Next Block” button.
 - 10) Under the “Data Entry” section, if you are creating a person record, enter the last name under the “Last Name” field and/or Social Security Number under the “SSN/SIN/TIN” field and then proceed to Step 11. If you are creating a non-person record, enter the non-person name under the “Non-Person Name” field and then proceed to Step 11.
 - 11) Under the “Data Entry” section, enter information into the “Street Line 1” (AP type) and/or “Telephone” (AP type) fields, if applicable.
 - 12) Click the “Duplicate Check” button.
 - 13) If the result of the Duplicate Check is...
 - a. New, click “Yes” when “No matches found, create as new?” window appears. Continue with data entry on desired form. *Warning! Be sure to verify “New” status by performing a manual search in Banner (Step 2).*
(End of Matching)
 - b. Match, click “Select ID” button. *Optional, click “Update ID” button to update selected record with information entered into GOAMTCH form.* Continue with data entry on desired form, such as FTMAGCY. **(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 FTMAGCY. **(End of Matching)**