

The SCT Banner Student and SCT Banner Financial Aid data load processes also had separate methods for comparing names against their common nicknames. SCT Banner 7.0 replaces these methods with common forms and tables in SCT Banner General.

4. Is CM used for batch or online processing?

CM is used for both batch and online creation of new identification records.

5. Can I use CM for non-persons?

Yes. You can set up rules specifically for matching persons, non-persons (i.e., companies and vendors), or both.

6. Do I have to use CM?

A check box on the Installation Controls Form (GUAINST) turns CM on or off for online processing for your institution. Individual users can be exempted from online CM via an indicator on the Common Matching User Setup Form (GORCMUS). However, CM must be used for all data loads (i.e., batch processing) that create new identification records.

7. Can I use CM even if I am exempt from required processing?

Yes. Excluded users may still choose to use the algorithm on a case-by-case basis via the Common Matching Entry Form (GOAMTCH).

8. Where is CM used in SCT Banner?

CM is used in all online forms that create new identification (SPRIDEN) records. We refer to these as the *IDEN forms, although not all of these forms contain the letters 'IDEN' (e.g., FTMVEND).

Batch processes that create SPRIDEN records use CM:

- Electronic Application Verify/Load Process (SARETMT)
- Electronic Prospect Match (SRRSRIN)
- Financial Aid Dataload Part 2 (RCPMTCH)

Each batch process will now call the new Common Matching algorithm to determine if a record is New, Matched, or a Potential Match. The Common Matching Entry Form (GOAMTCH) will be used to review records that are identified as potential matches or to identify new and matched records in the temporary tables.

Forms used to review the results from batch matching use CM:

- Electronic Application Process (SAAEAPS)
- Electronic Prospect Inquiry (SRIPREL)
- Financial Aid Suspended Records Maintenance (RCRSUSP)
- Online Transcripts Activity List (SHAEDIS)

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 display data from the temporary table to allow the user to execute the Common Matching procedure (Duplicate Check) and review the results of the process.

Refer to the product-specific release guides for a list of obsolete objects and the functionality being replaced with General objects as a part of Common Matching.

9. What are some common terms used in CM?

Algorithm - A step-by-step procedure for solving a problem or accomplishing some end especially by a computer.

Application programming interface (API) - A database package that encapsulates the business logic surrounding an SCT Banner business entity. A business entity is the smallest, most granular grouping of information that an application can modify.

PIDM – Person Identification Master. This is the internal identification number assigned to all person and non-person records. Even though records may have multiple names and external IDs, there can only be one PIDM.

10. What has SunGard SCT done to ensure the quality of this enhancement?

Clients have been involved in the development and testing of this enhancement at all levels. A client focus group helped us define the requirements and project scope. Clients participated in enhancement testing in Malvern, and several beta clients tested CM at their own sites with production-sized databases. SunGard SCT developers and consultants performed unit testing, modification testing, regression testing, and system testing.

11. Are there any implications if Value-Based Security (VBS) and Protection of Personally Identifiable Information (PII) are used with CM?

VBS and PII limit the information in SCT Banner that a user can see depending on business rules established by an institution. CM tries to prevent the creation of multiple identification records for the same person (or non-person) across the entire enterprise. If users cannot see all the identification records in the database, they are more likely to create multiples because the system is telling them that other matching records do not exist, when in fact, they do.

To resolve this apparent conflict, VBS and PII will be disabled on the Common Matching Entry Form (GOAMTCH) and on all batch processes that use the Common Matching Algorithm (see earlier Q/A for the list of these processes). So, regardless of whether CM is used online or in a batch process, users will be able to access all identification records across the enterprise.

12. Can I have multiple sets of matching rules?

Yes. Sets of matching rules are associated with the sources of the data. For example, users who create new identification records from financial aid applications have a different set of identity fields available than users who create records from contact cards received from a college night at a local high school. Social Security numbers are always available on financial aid applications but rarely on admissions test score files. Therefore, users in financial aid offices would typically use matching rules that are different from the rules used in the admissions or recruiting offices.

Within each matching source, you can also define multiple sets of fields to use for matching, with each set given a priority number. The matching algorithm looks for matches using priority number one, then two, and so on.

13. Do I need to create rules for all of my Oracle users?

No. You only need to create rules for those users who will be creating new identification (SPRIDEN) records. Users who attempt to create new identification records and are not defined on the Common Matching User Setup Form (GORCMUS) must use Common Matching but will not have any default values set for them.

14. Are there required data elements for matching?

The only field that must be used in all matching rules is the Search Last Name

