



Common Matching Using Banner 7

Job Aid: Common Matching Rules

◀ Jump to TOC

Creating Common Matching rules

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 elements which each rule will use in the matching algorithm
- assign a priority to each Rule Set
- copy previously created rules
- add specific database procedures to the matching rule for matching components that are not within General Banner tables (e.g., matching on high school data for Banner Student)..

Banner form

Common Matching Rules GORCMRL 7.3

Matching Source: ONLINE_ADMISSIONS Admissions Online Data Entry
 Comment:

Rule Set

Priority	Description	User ID	Activity Date
1	Online Admissions Rule 1	SAISUSR	16-AUG-2005

Rule Set Comment

Create Comments from Matching Rules Insert Core Matching Elements

Matching Rules (4) Copy To (1) Matching Procedures (0)

Column	Element	Length	Match on Null Data	User ID	Activity Date
SPBPERS_SSN	SSN/SIN/TIN	5	<input type="radio"/> Yes <input checked="" type="radio"/> No	SAISUSR	16-AUG-2005
SPRADDR_ZIP	ZIP/POSTAL CODE	10	<input checked="" type="radio"/> Yes <input type="radio"/> No	SAISUSR	16-AUG-2005
SPRIDEN_SEARCH_FIRST_NAME	FIRST NAME	5	<input checked="" type="radio"/> Yes <input type="radio"/> No	SAISUSR	16-AUG-2005
SPRIDEN_SEARCH_LAST_NAME	LAST NAME/NON-PERSON NAME	10	<input type="radio"/> Yes <input checked="" type="radio"/> No	SAISUSR	16-AUG-2005
			<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		




Common Matching Using Banner 7

Job Aid: Common Matching Rules (Continued)

◀ Jump to TOC

Procedure

Follow these steps to define the rules for a source code.

Step	Action
1	Access the Common Matching Rules Form (GORCMRL).
2	Enter the matching source code in the Matching Source field.
3	Update the matching source comment in the Comment field, if appropriate, by clicking the  (pencil) icon to edit the comment.
4	Perform a Next Block function.
5	Enter a priority in the Priority field.
6	Enter a description of the Rule Set in the Description field.
7	Enter a comment for the Rule Set in the Rule Set Comment field, if desired. <u>Note:</u> This field is optional, but can be helpful in identifying details about the Rule Set. After creating the rules, you may access this block again and have the system automatically create comments for you by clicking the Create Comments from Matching Rules icon.
8	Click the Save icon.
9	Click the Insert Core Matching Elements icon (optional). <u>Result:</u> This pulls the Core Matching Elements into the next block. The SSN (SPBPERS_SSN) and Last Name/Non-Person Name (SPRIDEN_SEARCH_LAST NAME) elements are delivered as Core Matching Elements. No additional elements can be marked as Core Matching Elements. When building Common Matching Rules, one of these elements must be included in each Rule Set for the algorithm to function properly.
10	Select the appropriate data element(s) from the LOV.
11	Update the length of the data elements as desired by changing the value in the Length field.
12	Use the Match on Null Data radio buttons to select either <i>Yes</i> or <i>No</i> to match on null data. <ul style="list-style-type: none">• Match on Null Data = Yes means that incoming data can be null or identical.• Match on Null Data = No means that incoming data must be <i>not</i> null and identical.
13	Click the Save icon.



Common Matching Using Banner 7

Job Aid: Common Matching Rules (Continued)

◀ Jump to TOC

Procedure

Follow these steps to enter a new priority and copy a rule to that priority.

Step	Action
1	With your cursor in the Rule Set Priority field, perform an Insert Record function.
2	Enter a 2 (or appropriate number to represent the next priority) in the Priority field.
3	Enter a new description in the Description field.
4	Click the Save icon.
5	With your cursor in the Rule Set Priority field, press the Up arrow to navigate to a priority you created previously. <u>Note:</u> This is the priority that has the Rule Set you want to copy.
6	Click the Copy To tab.
7	Use the LOV to select the new priority. <u>Result:</u> The Matching Source and Rule Set Priority fields will populate with the appropriate values. Only priorities that do not have rules will be listed.
8	Click the Save icon.
9	Click the Matching Rules tab to view the rules. <u>Note:</u> You can then modify the copied Rule Set as needed and save.
10	Click the Exit icon.



Common Matching Using Banner 7

Job Aid: Common Matching Rules (Continued)

◀ Jump to TOC

Procedure

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	Navigate to 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.