Common Matching Using Banner 7

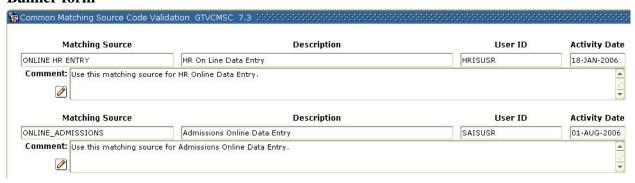## Job Aid: Source Codes and Source Rules

Creating source codes

The Common Matching Source Code Validation Form (GTVCMSC) is used to create the various source codes that may be used in Common Matching. The source codes identify the sources of the data.

Banner form

Procedure

Follow these steps to define source codes for online matching and batch process matching.

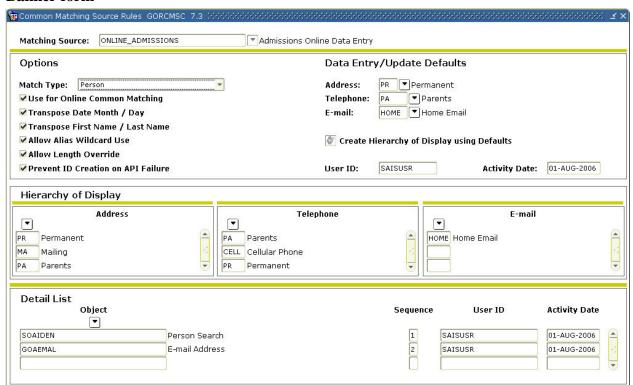| Step	Action
1	Access the Common Matching Source Code Validation Form (GTVCMSC).
2	Perform an **Insert Record** function.
3	Enter a source code for online matching in the **Matching Source** field. Example: *ONLINE_ADMISSIONS*
4	Enter a description of the source code in the **Description** field. Example: *Admissions Online Data Entry*
5	Enter a comment for the matching source (up to 4,000 characters in length) in the **Comment** field. Note: This is an optional field that allows you to enter details about the rule.
6	Perform an **Insert Record** function.
7	Enter a source code for batch processes in the **Matching Source** field. Example: *SAT*
8	Enter a description of the source code in the **Description** field. Example: *SAT Batch Process*
9	Enter a comment for the matching source (up to 4,000 characters in length) in the **Comment** field. Note: This is an optional field that allows you to enter details about the rule.
10	Repeat the process to enter new source codes as necessary.
11	Click the **Save** icon.
12	Click the **Exit** icon.

Creating defaults for source codes

The Common Matching Source Rules Form (GORCMSC) controls four areas of the Common Matching process for each source code.

This form is used to

- set seven options for each code
- set up defaults to be used when creating or updating records
- establish a hierarchy of display for addresses, telephone, and email data for potential matches
- establish which forms are available to navigate to from the Common Matching Entry Form (GOAMTCH) via the **Details** button.

Banner form

Procedure

Follow these steps to define defaults for address, email, and phone type to be used with a particular source code, and indicate if the source code will be used for online matching.

Step	Action
1	Access the Common Matching Source Rules Form (GORCMSC).
2	Using the **Matching Source** field, select the matching source code you created on the Common Matching Source Code Validation Form (GTVCMSC).
3	Select the type of matching (*Person*, *Non-Person*, or *Both*) using the **Match Type** drop-down field.
4	Click the **Use for Online Common Matching** checkbox to indicate that the source code can be used with online matching. Note: Any source code could be used for batch processing.
5	Select options for the matching source by clicking the appropriate checkboxes. Use the descriptions that follow as a guide to the options.

Option	Purpose
Transpose Date Month/Day	Allows matching on transposed dates. Note: You must include the "Birth Date" element in rule Example: 01/05 could match January 5th and May 1st
Transpose First Name/Last Name	Allows matching on transposed name elements. Example: Thomas Lee and Lee Thomas
Allow Alias Wildcard Use	Appends a % to incoming data to search for similar rows in Alias Tables (GORNAME). Example: 'Bet' entered on GOAMTCH will find 'Beth = Elizabeth' in an Alias Table and return potential matches with the first or middle name 'Elizabeth.'
Allow Length Override	Uses the length of incoming data to search for matches on name fields if the length of data on the rule is greater than data input. Example: The rule specifies a length of 5 for the First Name element; if 'Sam' is entered in the **First Name** field on GOAMTCH, potential matches that begin with 'Sam' like 'Samuel,' 'Samantha' and 'Samson' will be found.

Procedure, continued

Step	Action
6	Continue selecting the appropriate options for the matching source by clicking the checkboxes. Use the descriptions that follow as a guide to the options.

Option	Purpose
Prevent ID Creation on API Failure	Mandates that complete information for Address, Telephone and/or E-Mail must be provided in order to create a new ID. Creation may proceed by removing partial information.

Step	Action
7	Enter an address type code in the **Address** field. Note: Setting up default types for address, telephone, and email records is optional.
8	Enter a telephone type code in the **Telephone** field.
9	Enter an e-mail type code in the **E-mail** field.
10	Click the **Save** icon.
11	Click the **Create Hierarchy of Display Using Defaults** button if you want to populate the first line of the Hierarchy of Display block with the defaults you just entered.
12	Use the Hierarchy of Display block to specify a hierarchy for address, email, and/or telephone type to display for potential matches. Note: This is optional.
13	Click the **Save** icon after entering a hierarchy for each type.
14	Perform a **Next Block** function to access the Detail List block. Use this block to specify additional forms to which a user can navigate in order to investigate potential matches.
15	Enter a form name in the **Object** field. Example: *SOAIDEN*
16	Enter 1 in the **Sequence** field.
17	Enter another form name in the **Object** field.
18	Enter 2 in the **Sequence** field. Note: You can continue to add forms as appropriate.
19	Click the **Save** icon.
20	Click the **Exit** icon.