

## **Common Matching Using Banner 7**

Job Aid: User and Institutional Setup

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#### Assigning source codes to users

The Common Matching User Setup Form (GORCMUS) allows you to assign a default online matching source code to a specific Banner user (Oracle User ID) for online Common Matching processing. Additionally, you can use this form to specify whether users are allowed to choose from other matching source codes or if they are restricted to using the default.

#### **Banner form**

User ID 💌	Online Matching Sour	ce Description	Allow Other Exclud Matching Sources User	le Activity Date
HRISUSR	ONLINE HR ENTRY	HR On Line Data Entry		03-AUG-2006
AISUSR	ONLINE_ADMISSIONS	Admissions Online Data Entry		03-AUG-2006
				03-AUG-2006
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# **Common Matching Using Banner 7**

# Job Aid: User and Institutional Setup (Continued)

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### Procedure

Follow these steps to assign a default online matching source code to a specific Banner user.

Step	Action
1	Access the Common Matching User Setup Form (GORCMUS).
2	Enter the username in the User ID field or select one from the LOV.
3	Enter the source code in the <b>Online Matching Source</b> field or select one from the
	LOV.
	<u>Result</u> : The information in the <b>Description</b> field will default.
4	Click the Allow Other Matching Sources checkbox if you want to allow the user to
	select a source code other than the default.
5	Do you want the Common Matching Entry Form (GOAMTCH) to be called
	automatically for the user when he or she attempts to enter a new person/non-person
	record?
	• If yes, leave the <b>Exclude User</b> checkbox unchecked.
	• If no, click the <b>Exclude User</b> checkbox to exempt the user.
	Note: Excluded users can still choose to access the Common Matching Entry Form
	(GOAMTCH) when creating a new person or non-person record.
6	Click the Save icon.
7	Click the <b>Exit</b> icon.



#### Setting up institutional controls

The Installation Controls Form (GUAINST) is used to set up institutional controls. This form enables you to "turn on" online Common Matching for the entire institution.

<u>Note</u>: The Common Matching process is always used by batch processes regardless of the setting on GUAINST.

#### **Banner form**

Installation Controls GUA	AINST 7.0 0000000000000000000000000000000000	000000000000000000000000000000000000000			
Name:	BANNER University	ZIP/Postal Code			
Address:	SunGard Higher Education	Lengui:			
	Four Country View Road	Base Currency:	USD 🔽 United States Dollar		
	Great Valley Corporate Center				
	Malvern PA 19355	Maximum Number			
Nation:	157 United States of America	or Open Forms:			
		Century Pivot:	49		
Phone:	215 6475930	Default Date Format:	• MDY		
			ODMY		
Operating/System:			○ YMD		
Installation Type:	Higher Education				
Instance Name:	s10b80	System/Process	Online Matching Process Enabled		
		Enable Indicators.	☑ Workflow Enabled		
			SQL Trace Enabled		
Activity Date:	20-JUN-2006		Messaging Enabled		
Installation Information					
	Release Date		Release Date		
🗹 Advancement	7.3 16-JUN-2006	Finance	7.1 06-JUN-2005		
🗹 Accounts Receivable	7.2 07-NOV-2005	🗹 Human Resources	7.1 06-JUN-2005		
🗹 Financial Aid	7.0 31-AUG-2004	Position Control	7.1 06-JUN-2005		
Other Financial Aid		Student	7.3 02-JUN-2006		
GENERAL	7.3.1 10-JUL-2006				

#### Procedure

Follow these steps to enable online Common Matching for the institution.

Step	Action
1	Access the Installation Controls Form (GUAINST).
2	Click the Online Matching Process Enabled checkbox to enable online Common
	Matching.
3	Click the <b>Save</b> icon.
4	Click the <b>Exit</b> icon.