Introduction to Common Matching/General Person

It is important to familiarize yourself with the University’s Data Standards prior to entering data into Banner. Data Standards can be found at: http://www.enrollment.memphis.edu/registrar/data_standards/index.html

Before accessing any student data, users will need to complete the Family Educational Rights and Privacy Act (FERPA) tutorial at https://itweb2.memphis.edu/ferpa/login.php. This tutorial will provide basic knowledge of the rules governing release of student information.

1. Go to: http://spectrumtest.memphis.edu:9099. Under Internet Native Banner (INB), select Internal Training Database [ITRNG] and login with your UUID and password.

   The General Menu (GUAGMNU) screen will appear.

   **NOTE:** For the purposes of this training you will be using the spectrumtest URL. For all production work you will need to access Banner through the Spectrum production portal at: http://spectrum.memphis.edu.

2. In the Go To… field enter the Form ID (e.g. APAIDEN, FOAIDEN, PPAIDEN, SPAIDEN); strike Enter.
Search using a Wild Card (%)

1. Strike **Tab** to place the cursor within the **Name** field.

   Type as much of the name as possible and then place % at the end to signal where you are unsure of the values. The screen shot below shows an example.

   Strike **Enter** when you are ready to search. The **ID and Name Extended Search** window will appear.

2. Click on the **Search Results** field drop down (A); the list of results will appear.

   If the wild card produced too many results for you to determine the correct user, additional search criteria may be entered into this window; see the screen shot below (B).

   After entering additional criteria, click the Spotlight (C) to continue the search.

   The new results can be viewed within the **Search Results** drop down (A).

   If the search does not return the record you are looking for, the next step is to Generate an ID.
Exit out of the **ID and Name Extended Search** window by the X it the upper right of its window box to prepare for this next step. You will be returned to your original Form ID screen.

**Other Searching**

Click on the **ID** drop down arrow (A); the **Option List** will appear. Select the appropriate option for your search.

The two most common searches are **Person** and **Non-Person**.

When selecting **Person Search (SOAIDEN)** (B); the **SOAIDEN** form will appear (see screen D below).

When selecting **Non-Person Search (SOACOMP)** (C), the **SOACOMP** form will appear (see screen E below).

If the search does not return the record you are looking for, the next step is to Generate an ID.
**Generate an ID**

1. From the *AIDEN form, click the **Generate ID** icon. The Common Matching Entry (GOAMTCH) screen will appear.

2. Click on the **Matching Source** drop down arrow (A); the *Common Matching Source Code* window will appear.

   Select a Matching Rule (it will become highlighted when clicked) (B).

   Click **OK** (C). The *Common Matching Source Code* window disappears and the Rule you select will now appear in the **Matching Source** box.
3. To get your cursor in the Data Entry area, click the **Next Block** icon in the tool bar or strike the *Ctrl* and *Page Down* buttons at the same time.

4. Enter the information for the fields within the Data Entry area. The number of fields you enter data for is determined by your requirements.

5. When finished entering data, click the **Duplicate Check** icon.
6. If matches occur these will appear near the center of the screen in the **Potential Matches** tab (A). Review the data and determine if any are the matching record.

- **If a record is a match:**
  - Highlight the matching record, then click the **Select ID** (B) icon. You will be re-directed to the *AIDEN* form.

- **If no records match:**
  - If none display at all, a **Banner** alert message will display (see next page). If you are certain the record does not exist, click **Yes** to create the new record.
  - If records were displayed, but none were the correct match and you are certain the record does not exist, click the **Create New** icon (C). A **New ID Created** alert message will display (see next page).
Banner alert message:

After clicking **Yes**, the *New ID Created* alert message (below) will appear.

![Banner alert message](image)

**New ID Created alert message:**

Click **OK**. You will be redirected to enter additional information for the record on the *AIDEN* form.

![New ID Created alert message](image)