

STATE OF NORTH DAKOTA

CAMPUS COMMUNITY
SEARCH MATCH
TRAINING MANUAL

VERSION 8.0

Disclaimer

Written by MAXIMUS-ERP Solutions Group, May 2004.

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SEARCH MATCH

OVERVIEW

To use the full functionality of your system, you must maintain the integrity of your database. Because users from many departments enter data into your system, you should take measures to minimize duplicate or multiple records. Consider requiring users to determine if a record already exists for an individual before adding one.

The Search Match feature enables you to define criteria for checking for duplicate or multiple entries of individuals.

Use Search Match to determine if a record already exists for an individual before adding one.

Security must be defined for using Search Match.

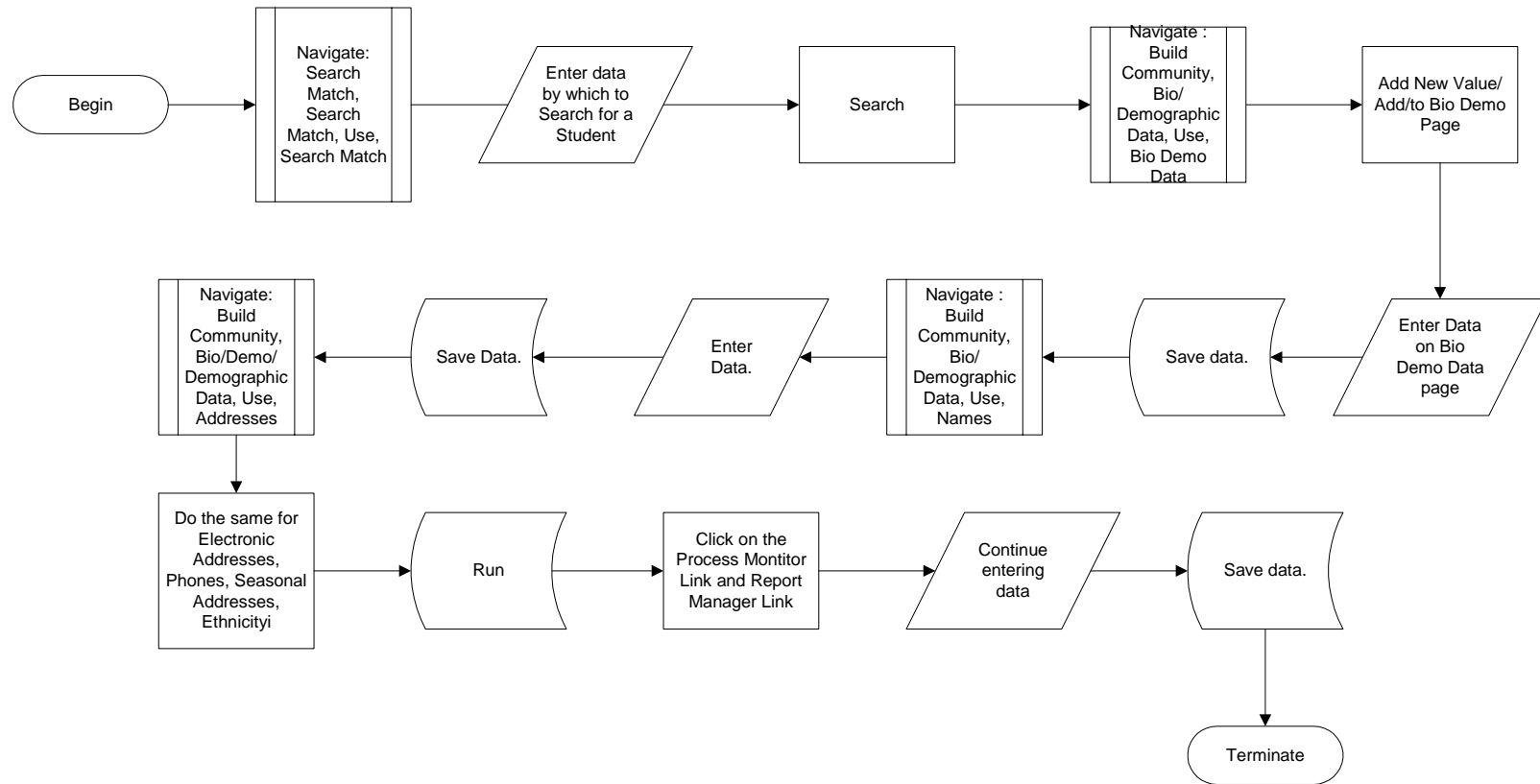
OBJECTIVES

After completing this section, you will be able to:

1. Search for duplicate records.
2. Find the necessary record for the student (if previously created.)

SEARCH MATCH BUSINESS PROCESS FLOW

This business process allows the user to determine if a record already exists for an individual before adding one

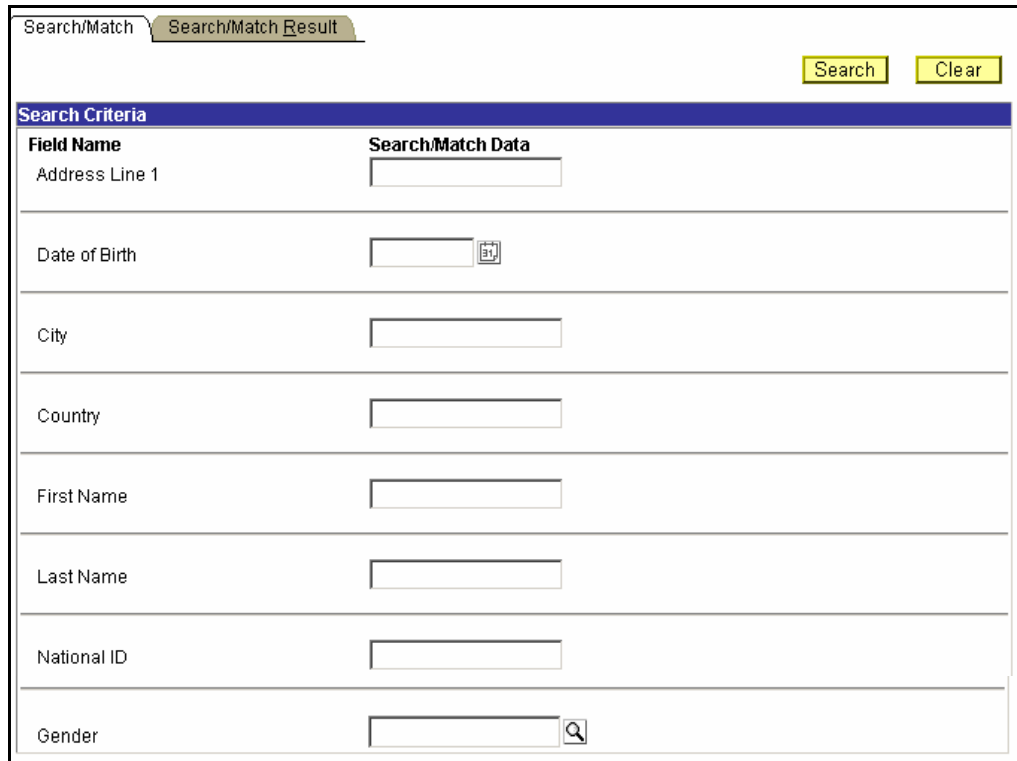


WALKTHROUGH – SEARCH MATCH



Use the Search Match page to enter data by which to search for possible duplicate records in your system. This is a process you will need to do each time you enter a new prospect in order to prevent duplicate records.

INITIATE SEARCH MATCH

1. **NAVIGATION:** Home > Build Community > Bio/Demographic Data > Inquire > Search Match
2. The **Search Match** page is displayed.



The screenshot shows a web application interface for 'Search/Match'. At the top, there are two tabs: 'Search/Match' (active) and 'Search/Match Result'. To the right of the tabs are two buttons: 'Search' and 'Clear'. Below the tabs is a section titled 'Search Criteria' with a blue header. This section contains a table with two columns: 'Field Name' and 'Search/Match Data'. The rows in the table are as follows:

Field Name	Search/Match Data
Address Line 1	<input type="text"/>
Date of Birth	<input type="text"/> 
City	<input type="text"/>
Country	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
National ID	<input type="text"/>
Gender	<input type="text"/> 

3. When entering data, press **TAB** to move between fields. After entering data in the final field, press **TAB** to move from the field.

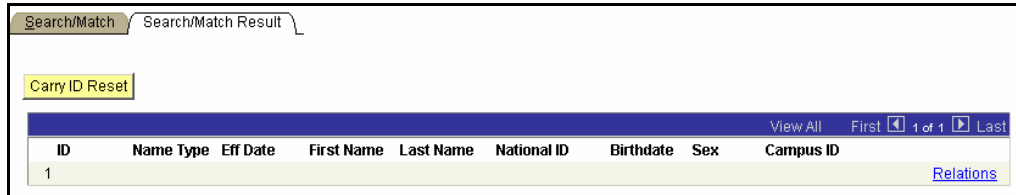
4. The following minimum data should be used to begin the search to prevent duplicate records: Search first by Last Name and First Name together, then search by National ID (SSN).
 - a. **Last Name:** The last name, or any set of the first letters of the last name, for which the system should search.
AND
 - b. **First Name:** The first name, or any set of the first letters of the first name, for which the system should search. Also, use a shortened version of the name to check for matches (i.e. Mike for Michael, Jon for Jonathan, Tom for Thomas, etc.)
THEN search by
 - c. **National ID:** The National ID number, or any set of the first characters of the national ID number, for which the system should search.
5. Additional information to further limit a search includes:
 - a. **Address Line 1:** The first line of the address for which the system should search.
 - b. **Date of Birth:** The date of birth for which the system should search.
 - c. **City:** The city name, or any set of the first letters of the city name, for which the system should search.
 - d. **Gender:** The gender (F for female, M for Male, or U for Unknown) for which the system should search.
6. Click at any time to clear entries in the search match data fields. This resets the search match criteria.

SELECTIVE SEARCH ORDER BY NUMBER

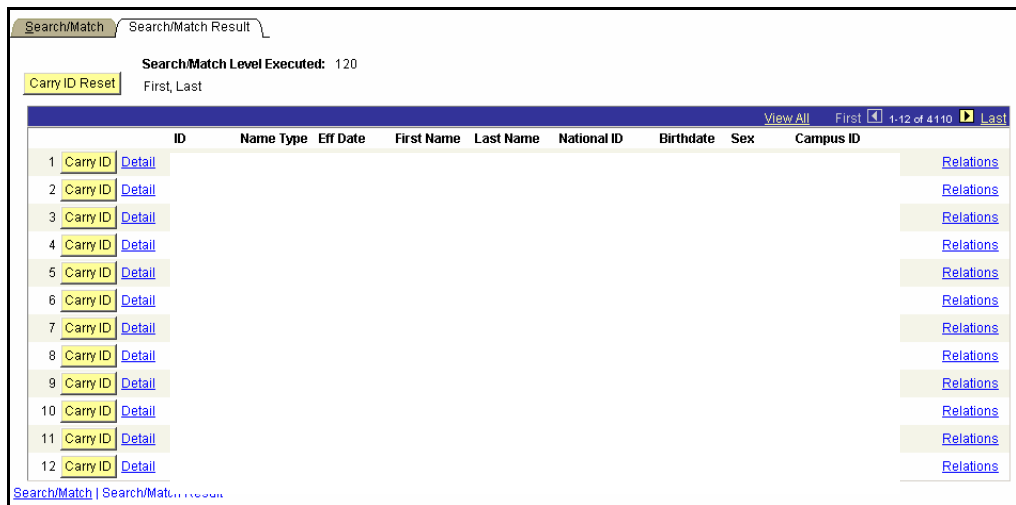
1. Click **Search** or you can page down and select the search order by clicking on any highlighted numbers in the **Selective Search Order by Number** section to launch the search.

Selective Search By Order Number	
	Description
10	Portal
20	First, Last, DOB, National ID
30	Last, DOB, National ID
40	DOB, National ID
50	First, Last, National ID
60	Last, National ID
70	National ID
80	First, Last, DOB
90	Last, DOB
100	First, Last, City
110	Last, City
120	First, Last

- If PeopleSoft did not find existing records the **Search/Match Result** page will be displayed without records displayed.



- If PeopleSoft did not find an existing record for the individual, click **Carry ID Reset** to add the individual. The system clears the Carry ID function so that *New* appears in the ID field of the search box on the next page you access in the Add New Value mode.
- If PeopleSoft found existing records or an existing record for the individual, the **Search/Match Result** will be displayed.



- If PeopleSoft found an existing record for the individual, click on **Carry ID** to access that record. This will capture and carry the individual's ID to the ID field of the search box on the next page you access so that you can access the record and review, add, or update data for the individual.

6. If PeopleSoft found more than one existing record for an individual, no action should be taken on this record until data cleanup is done. In this case, a PTR should be filed with the HECN Help Desk (701) 777-2222 or (866) 457-6387. Please include the following information for both records:
 - a. Name
 - b. ID
 - c. Date of Birth
 - d. National ID (SSN)
7. You can click on [Detail](#) to access the **Bio/Demo Data** page where you can confirm or view additional information about the individual.

The screenshot displays the 'Bio/Demo Data' page with the following sections:

- Personal Data:**
 - Effective Date: 07/07/1995
 - Name: Format Using: USA, United States
 - Marital Status: Single
- National ID:**
 - Country: USA, *NID Type: PR, SSN, National ID, Primary (checked)
- Biographic Information:**
 - *Gender: Female, *Date of Birth: 08/23/1956
 - Military Status: Non Vet, Campus ID: 001168834, Disabled (unchecked)
- USA:**
 - Ethnic Group: White, Ethnicity Detail
 - Disabled Veteran (unchecked), VA Benefit (unchecked)

RELATIONSHIP WITH INSTITUTION DETAIL

1. You can click on [Relations](#) to access the **Relations With Institution Detail** page where you can determine the type of relations the individual has with the institution and further clarify if this is the individual for whom you are searching.

Relations with Institution Detail

First Name: **ID:** AD1047

Last Name:

Currently Is A(n)

Alumni (L):	<input type="checkbox"/>
Student Applicant (A):	<input type="checkbox"/>
Employee:	<input type="checkbox"/>
Financial Aid (F):	<input type="checkbox"/>
Prospect (P):	<input type="checkbox"/>
Student (S):	<input type="checkbox"/>
Student Financials (I):	<input type="checkbox"/>
Recruiter (RCR):	<input type="checkbox"/>
Advisor (AVS):	<input type="checkbox"/>
Instructor (IST):	<input type="checkbox"/>
Friend (FND):	<input type="checkbox"/>

2. Selecting the **Currently Is A(n)** box for any of the options listed indicates that the individual currently has that relation to your institution.

Note. PeopleSoft Contributor Relations uses the abbreviations on this page in its CR search.