Common Matching Meeting
Tuesday, May 17, 2007
2:00 – 3:15 pm, WES206

Minutes

Present: Adam Wetherell, Bruce Gilchrist, David Steffens, Denise Grinnell, Lisa Besemer, Sara Dew

Absent: Sherry Standen

1. **Follow-up on the various assignments from previous meetings:**

March 6th Meeting:

Who	What	Status
Sarah	Submit the request for Sherry Standen and Denise Grinnell to have access to the Common Matching forms in Banner	COMPLETED
Bruce	Create an Admissions Person rule in SAND and test it out with the EMT import	*See repeat item below.*
Dave	Run the duplicate identification file and give it to Denise	COMPLETED
Denise	Contact Karen Thompson for any historical information and then possibly add Kim Graboskey	Karen agrees someone from AR should be added; question is out to Kim G about whom to add.
Denise	Contact Charlotte; she no longer needs to send out "Delete Record" notices to her e-mail group	COMPLETED
Denise	Work on getting a student (possibly Masters level) part-time position to fill this role	*See repeat item below.*
Denise	Look at the synonym table and add entries as necessary.	Added approx. 100 new nickname entries. Add the entire list (http://deron.meranda.us/data/nicknames.txt) to the table. Inform Admissions of additions and encourage them to submit additional ones to be added to the table. Lisa asked that GORNPNM be updated for common Corporate nicknames or abbreviations.
Adam	Talk with Bobbie to encourage her to attend the appropriate session at Summit on this topic and come back and instruct the group.	Bobbie attended. The committee decided that we are too new on Banner to test and implement an automated merge process.

April 10th Meeting:

Who	What	Status
Bruce & Charlotte	Continue to test in SAND	TESTING IN PROCESS; initial testing in SAND against the large ACT import file was not

		successful. Changes and additional testing needs to be done.
Denise	Put the master list and database on a share drive for all team members to access.	There is no "master list." The database should be the definitive source of information on identifying and cleaning up duplicates. The database has been put on J:\IST\Banner Project\PHASE THREE (Banner Live!)\Duplicate ID Resolution Team. The database cannot be used until the user's computer has been set up with the appropriate ODBC connector (see Dave Steffens).
Denise	Hire advanced student under Denise's supervision	IN PROCESS; This person's responsibilities would be to process the records in the Duplicates Database by identifying duplicates and communicating with the various offices to make appropriate determinations. This person will also work beside Charlotte Tetsworth in the Admissions Office to assist in merging the simple duplicates there (as Admissions duplicates are likely 80% of those generated). Charlotte is eager for this help.
Dave	Run the duplicates report weekly	On Hold until a student is hired to begin reviewing it. Committee recommended reviewing the most recent weekly list first and getting all duplicates merged then working on the backlog. The sooner the new duplicates are resolved, the easier they are to merge.
Bruce	Talk to Craig about any Student issues with deleting SPRIDEN-only records	IN PROCESS. Upon further consideration by the committee, it is not likely that a record would ONLY have a SPRIDEN record. Requested Dave write and run a script (in SAND) of how many records have only one or more of the following records: SPRIDEN, SPBPER, SPRTELT, SPRADDR. This committee will then review those results and if we determine that (a) there are enough to warrant further work, and (b) that we are sure records with only these tables attached can safely be deleted, we will forward the recommendation to the FACT.
Sherry	Ask Charlotte to write up the new procedures and distribute them to the group for review, approval, and implementation.	Unknown

2. Demo the Access database

Suggestions made by the committee were:
- Contact Sam Fattore about possibly speeding up the ODBC connector between this Access database and Banner. It is very slow to work with.
- Add an additional field to indicate who is the primary person responsible for merging the identified duplicates.

- In the "Left/Right PIMS" view, add this additional field to view so that other departments can easily find the duplicates they are responsible to merge.
- Add an additional entry to the "Status" field to indicate when the duplicate has been taken care of.
- Pull through the SPRIDEN ID rather than the other alternate ID fields.
- Make this database the definitive source for all communication about possible and merged duplicates for historical reference.
- Dave created a script and put it in job submission which can be run to identify how many rows are on a particular ID throughout all of Banner – not just the modules displayed on GUASYST. This job has been added to the Common Matching security class.

3. **Review a few "messy duplicates" that cross departments**

- When one record has a Financial Aid application and the other record has multiple areas, Sara indicated that it is often easier for her to re-import the ISIR to the second record and delete the info off the FinAid-only record.
- Jane Suzanne Jones (12005143 & 22262) – go ahead and send this one around like Charlotte has done previously. These can be worked on electronically; we don't need to get together as a group to do it.

New Assignments from this Meeting:

Who	What	Status
Denise	Contact Sam Fattore about ODBC help	
Denise	Work with Duplicates database and consider modifications	
Denise	Send Jones duplicate around to be merged	

Minutes Notes submitted by Denise Grinnell