Preventing Duplicate IDs in MaineStreet Campus Solutions using Search/Match

Search/Match

is a tool within MaineStreet which enables you to determine if a person already exists in the system.

Before entering any person information into our Student Administration System, PeopleSoft @ MaineStreet, you MUST search the Campus Solutions database using Search/Match to determine whether a record already exists for the person. A thorough search is necessary to avoid creating someone with multipleEMPLIDs.

Setting up a Saved Search

Before you begin using Search/Match to find a person, create a Saved Search to save steps when performing a future Search/Match. Once you have successfully created the search, you can use it each time you come to this screen. Since all of your searches will be for a person, the most efficient way to proceed is to save the relevant search parameters. After you save them, you need only enter the person’s information the next time you return perform a Search/Match.

Navigate to the Search/Match page

MyCampus > MaineStreet > Enterprise Applications > Campus Solutions 9.2 Production Database (CSPRD) > Navigation Bar > Navigator > Campus Community > Personal Information (Student) > Search /Match

Consider adding a tile to your CSPRD Homepage for quick access.

Follow the steps below to create a Saved Search
1. **Search Type**: select Person. **NOTE**: To locate a person in the database always use the Search Type of Person. The Applicant Search Type is for HR use only.

**Search/Match**

Enter any information you have and click Search. Leave fields blank for a list of all values.

- **Search Criteria**
  - Use Saved Search: 
  - Search Type: 
  - Search Parameter: begins with: UMS_ONLINE
  - Ad Hoc Search
  - Description: begins with: 

- **Save Search Criteria**
- **Delete Saved Search**

2. **Search Parameter**: Click on the magnifying glass to open the pop-up window.
3. Choose UMS_Online from the list. This will close the window.
4. Click the Save Search Criteria link.

5. In the **Name of Search** box enter Person.
6. Click the yellow Save button.
7. On the next screen, click the Return to Advance Search link.

**Save Search As**

Name the search and then click Save.

**Name of Search:**

The saved search will contain these values:

- **Search Type**: Person
- **Search Parameter**: begins with UMS_ONLINE
- Ad Hoc Search
- Description: begins with

- **Save**
- Return to Advanced Search
8. This brings you back to the Search/Match page. Click the yellow Search button.

9. Click the Default search result code link in the Search Result Rule box at the top of the page.

10. Click the magnifying glass next to the Search Result Code box to open the pop-up window.

11. Select the UMS_PERS_RESULT option at the bottom of the list. This will close the pop-up window.

12. Click the yellow OK button.

You now have a saved search. Anytime you return to this screen simply select Person in the Use Saved Search box.
Performing a Search/Match

Use Search/Match carefully!

Only you can prevent duplicate IDs.

Duplicate Student IDs and/or EMPLIDs cause hours of dreary cleanup work. When they are not discovered early they can lead to errors and delays in service such as inability to register, pay fees or receive financial aid or refunds, missed communications and missed opportunities for the student and for the campuses.

New person records are created in Campus Solutions as prospects, applicants, quick admits and as non-student persons through Add/Update a Person. Additionally, new person records are created in Human Resources for new employees. These records then populate the Campus Solutions database. If there is any indication that the person is or was an employee, they will already have an EMPLID.

Most errors occurring these days are with one of the records being a prospect. Prospect information is often less complete and less formal than what comes in on formal applications. Nicknames are used, addresses are vague, national IDs and Dates of birth are rare. Usually there is enough of some combination of data to determine a match.

When performing a search/match a very natural temptation is to enter as much information as you know about the person so you can make sure the name returned is really the one you want. Despite being well-intentioned, that is not the way to go about it. Less is more. See Pro Tips at right. When performing search/match, you want to enter as little as you can to get a manageable list returned to pick from. When no results are returned, do not be too quick to assume you need to add a new record—try another search. When you do get a list of possible matches, examine them carefully to see if you have the correct one, and to see if there are TWO correct matches...that is, an already existing duplicate that needs to be reported before it gets worse. This is when you can call into play the other data (address, DOB) that you know about a person. This takes extra time and care, but will speed up with practice, when you get more familiar with how search/match works.

1. In the Search Criteria box, enter all of the information you have available.

   Pro Tips

   For First Name Search you should limit it to the first three or four letters of the name to bring up more possible matches. See Pro Tips at right for more examples.

   Make sure to tab out of the fields to activate the buttons that appear in the lower section.

2. There are four searches, each configured using different parameters, to help you find an individual in MaineStreet. Criteria you have not entered will be automatically greyed out. Click on the first yellow Selective Search button that is available. In the example below, for Birthdate, Last Name.

   a. If there are no matches a pop up window will appear. Click OK and continue down to the next available Selective Search button.

   b. If there are matches, a window will display with the all of the people who match the search criteria. See step 3.

3. If there is a potential match, this page will appear. In most cases, individuals will have more than one row for the same EMPLID. This depends on how much data is in their account. You can tell they all belong to the same EMPLID by looking at the Empl ID column. Examine the rows carefully to see if you have the correct one, and to see if there are TWO correct matches...that is, an already existing duplicate that needs to be reported before it gets worse. This is when you can call into play the other data such as address and date of birth that you may know about the person so you can make sure the name returned is really the one you want. Despite being well-intentioned, that is not the way to go about it. Less is more. See Pro Tips at right.

   Usually the nickname is received first, as a prospect.

   Abe, Abraham
   Al, Alan, Allan, Allen
   Alison, Allison, Allyson
   Andrew, Andy, Drew
   Alex, Alexander, Sandy
   Bill, Billie, Billy, William
   Bob, Bobbie, Bobby, Robert
   Charles, Chuck
   Dick, Dickie, Richard
a person.

This search resulted in a number of results, and three IDs found. But when we look for unique identifiers, we also see that there are only two addresses. Two individuals, three IDs. Both IDs for Howard Clymore are the same, and all of the information displayed matches. However, It appears that the information for Howard Clyborne contains two IDs. So not only is this person already in MaineStreet, they have been entered twice, and assigned two EMPLIDs. Although you would have picked up at least one record if you had entered HOWARD instead of only HOW, you would not have picked up the HOWIE record and would have missed the duplicate IDs.

4. Additionally, you can use the column names at the top of the table, click to sort (once: ascending, once more: descending) any data in the table by whatever fields you feel are helpful. If your results display more than 20 rows, a View All link will appear in the title bar of the Search Results box. Click to view up to 100 rows. If you there is more than one page, scroll through using the arrows to the right of View All.

5. Sorting
   a. The date of birth is usually the most helpful: click the Date of Birth column once to sort by ascending. Any Empl IDs with blank DOB will appear first. These are especially important to check as they are missing a critical piece of data. A positive Empl ID matching would typically require the address or email address in these cases.
   b. Sorting by Date of Birth also arranges the rows in an order that makes it easy to identify Dates of Birth that are similar to the one you have. It is possible that the individual has a previous ID which may have either a typo or handwriting misinterpretation from when it was entered. The Date of Birth sorts by month, then day, then year. Look for birthdays with months and days similar to your individual.

6. When you are done with that particular parameter search, hit “return to search criteria” near the top of the page.

**Pro Tips**

You can do a ctrl+F search in your browser to highlight anybody that was born a certain year, or month/day if that is helpful.

You can hit the Detail button next to the individual’s Empl ID to display some extra information not included in the table, like telephone number.

7. Repeat the process (Step 2) for all parameter searches until you find your individual; if you have gone through all the parameter searches and you have confirmed that an Empl ID does NOT currently exist for your individual, you are now welcome to create a new Empl ID.
   a. Repeat this process for individuals with dual (spaced or hyphened) last names (i.e. Smith-Doe; do separate last name searches for both “Smith” and “Doe”)
   b. Repeat this process (step 2) if you have a common preferred name (i.e. William/Bill), or other preferred name you may be aware of. Also repeat this process for individuals where their first/last name order may be difficult to determine (i.e. Paul, Arnold; or, Ashundo, Mohamed; do separate searches for the reverse: Arnold, Paul; or Mohamed, Ashundo)

8. If you DO identify a duplicate, please report it by submitting a ticket in the IT Help Desk.
9. If you need more information than what is presented to determine if there is a match, click on the Detail link next to the yellow Carry ID button to bring up the bio-demographic information. If you believe it to be the same person, click on the Carry ID button. If there is no match, click the Return to Search Criteria link to return to the Search page then click on the Carry ID Reset button to clear out any saved EMPLIDs.