



*Performance Matters!  
John Matherson, honors degree, economics  
A research project on sustainable development.  
A career in government policy.*

**SUNGARD** HIGHER EDUCATION

SUMMIT 2008

# Duplicate PIDM Management

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# Session Rules of Etiquette

- Please turn off your cell phone/pager.
- If you must leave the session early, please do so as discreetly as possible.
- Please avoid side conversation during the session.
- Please save all questions until the end of the presentation.

Thank you for your cooperation!



# Duplicate PIDM Management Overview

- **About Us**
- **Why Duplicate PIDMs are a Problem**
- **Installing Our Custom Application**
- **Using Our Custom Application**
- **Summary**



# Manhattan College

## About Us



- **Founded by the De La Salle Christian Brothers in 1853.**
- **Located in Riverdale, New York City.**
- **Undergraduate enrollment of 2700; graduate enrollment of 500.**
- **Staff of five administers and supports the Banner product.**
- **Modules in use: Advancement, Finance, Financial Aid, Human Resources, and Student.**
- **Contract with SungardHE for Remote Database Services for upgrades.**



# Why Duplicate PIDMs are a Problem

- **How Duplicate PIDMs Get Created**
  - If a user in an office does not use the Common Matching functionality in Banner and does not do a simple “Name Search” before creating a new person record, you have the possibility of creating a new person record for someone who is already in your system.
  - If your institution uses any automated processes for creating new person records, you have the same possibility that a new person record will be created for someone who is already in your system.



# Why Duplicate PIDMs are a Problem

- **Why is This a Problem?**

- **An admissions applicant can have two applications accepted, which will throw off your count of accepted students.**
- **A student can have registration information on one PIDM and financial aid information on another PIDM; financial aid will not be able to disburse aid until the two IDs are merged.**
- **An employee might have one Banner ID created via student records and a second ID created by Human Resources staff. Human Resources would then not “know” that the employee is taking classes and apply tuition reimbursement.**
- **Since users in the Admissions, Registrar's, Controller's, Human Resources, and Advancement Offices can create records, you can see the possibility for duplicates.**
- **One end result: When logging in to Self-Service, the person will not see all of his/her information.**



# Why Duplicate PIDs are a Problem

- **How Do You Resolve This?**
  - Train your users to use Banner's Common Matching functionality.
  - Once a duplicate is created, resolve the duplicate via manual updates—i.e. A series of SQL scripts to update records, copy records, and delete records.
  - All schools must have some way that they handle this...ask around.
  - First, a trivia question....



# Why Duplicate PIDs are a Problem

- Who Is This Man?



# Why Duplicate PIDMs are a Problem

- Steve Rea (previous slide) works in the Cooperative Extension Service, which is part of the University of Arkansas' Division of Agriculture.
- Steve Rea's "pidmin.sql" is the basis behind our custom application.
- His website: [http://www.uaex.edu/srea/#Oracle\\_Scripts](http://www.uaex.edu/srea/#Oracle_Scripts)
- It's what we have used since going live with Banner.
- His newer "fieldin.sql" code is also a life-saver.
- Steve also has some command line scripts for handling the actual delete of all data for a PIDM.



# Installing Our Custom Application

- **Got Java?**

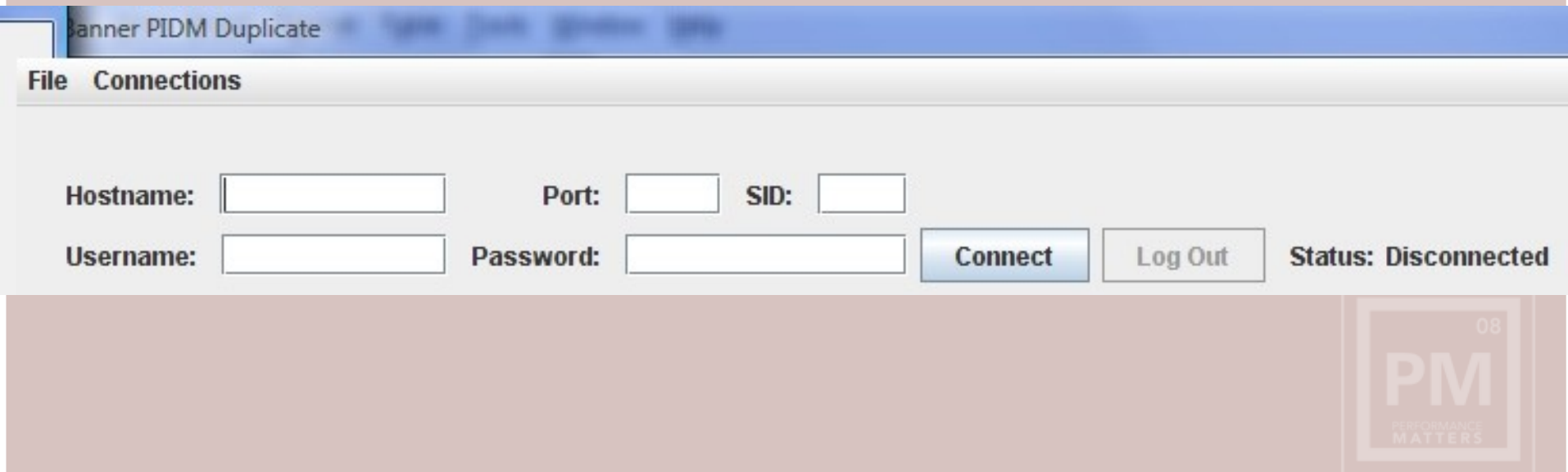
- Our code is written in Java, so to run the application, you will need to have a working Java runtime installation.
- To see if you have a Java virtual machine installed on your system, type:
  - `java -version`
- To run our code:
  - `java -jar pidm_duplicate.jar`
- First time installation note: The code that we have written requires a directory of **C:\pidminlogs** to store log files and connection settings (settings.xml file).



# Using Our Custom Application

- **Initial Connection**

- **Fill in the Hostname/IP Address of your Banner database server.**
- **Fill in the port that the database is listening on.**
- **Fill in the SID for the database (PROD, TEST, etc.).**
- **Fill in a username and password to connect to the database.**
- **After hitting “Connect” you will have the option to save your connection settings.**



The screenshot shows a web application window titled "Banner PIDM Duplicate". Below the title bar is a menu bar with "File" and "Connections". The main content area contains a form for database connection settings. The form includes input fields for "Hostname:", "Port:", "SID:", "Username:", and "Password:". To the right of the "Password" field are two buttons: "Connect" and "Log Out". Further to the right, the status is displayed as "Status: Disconnected". In the bottom right corner, there is a logo for "PM PERFORMANCE MATTERS" with the number "08" above it.

Banner PIDM Duplicate

File Connections

Hostname:  Port:  SID:

Username:  Password:    Status: Disconnected

08  
PM  
PERFORMANCE  
MATTERS

# Using Our Custom Application

- **Note that you will want a username and password that will have the Oracle privileges `SELECT ANY TABLE` and `UPDATE ANY TABLE`.**
- **Otherwise:**
  - **You will have the possibility of your user not being able to “see” all of the tables where the PIDM has an entry.**
  - **You might be able to see the tables but not insert, copy, or delete the data to perform the merge.**
- **If your institution uses VPD (Virtual Private Database) or FGAC (Fine-Grained Access Control)--note that the user running the query will need to be able to see and update all of the tables for the same reason.**



# Using Our Custom Application

- **Initial Query**

- If you know the two PIDs that you would potentially like to merge, enter them in the “Enter PIDM 1” and “Enter PIDM 2” fields.
- If you do not know the PIDs, you can enter the Banner ID number for both ids or click the “Name Lookup” button.

**Name Lookup Form**

Name Lookup

First Name:  Last Name:  Middle:

PIDM	ID	First Name	Last Name	Middle Initial	Change Indicator	SSN Number	Date of Birth
149090	000157978	Stephanie	Zimbalist				1956-10-08



## • Tables Tab

- Once you have two PIDMs' worth of data, you can click the “Tables” tab to view all of the tables where there is data for the two PIDMs.
- Data can be moved from one PIDM to the other or copied from one PIDM to the other.

The screenshot shows a software interface with three tabs: 'Biographical', 'Tables', and 'Columns'. The 'Tables' tab is active. It displays two columns of table names, each with a 'Count' value. The left column is titled 'Pidm 1 Tables: 149090' and has a count of 39. The right column is titled 'Pidm 2 Tables: 290133' and has a count of 14. Between the two columns is a vertical menu of actions. Below each table list are 'Row:' labels and 'Next' and 'Prev' buttons. At the bottom left, there is an 'Error Messages:' label and a text input field.

**Biographical** | **Tables** | Columns

Pidm 1 Tables: 149090  
Count: 39

- GENERAL.GOBSRID
- GENERAL.GOBTPAC
- GENERAL.GORPAUD
- \*\* SATURN.GOBTPAC\_2008\_01\_11
- SATURN.SFBETRM
- SATURN.SFRRACL
- SATURN.SFRSTCA
- SATURN.SFRSTCR
- SATURN.SGBSTDN
- \*\* SATURN.SGBSTDN\_05242007
- \*\* SATURN.SGBSTDN\_MAX
- SATURN.SHRGCOL
- SATURN.SHRGPAC
- SATURN.SHRGPAL
- SATURN.SHRLGPA
- SATURN.SHRTCKD
- SATURN.SHRTCKG
- SATURN.SHRTCKL
- SATURN.SHRTCKN

Row: [Next] [Prev]

**Actions:**

- (col1 --> col2) Copy all rows-->
- (col1 --> col2) Copy current row -->
- (col1 --> col2) Move all rows-->
- <--Delete all rows from column 1
- <-- Copy all rows (col1 <-- col2)
- <-- Copy Current Row (col1 <-- col2)
- <-- Move all rows (col1 <-- col2)
- Delete all rows from column 2-->

Pidm 2 Tables: 290133  
Count: 14

- GENERAL.GOREMAL
- SATURN.SARADAP
- SATURN.SARCHKL
- SATURN.SHRLGPA
- SATURN.SHRTGPA
- SATURN.SHRTRAM
- SATURN.SHRTRCE
- SATURN.SHRTRCR
- SATURN.SHRTRIT
- SATURN.SORLCUR
- SATURN.SORLFOS
- SATURN.SPRADDR
- SATURN.SPRIDEN
- SATURN.SPRTELE

Row: [Next] [Prev]

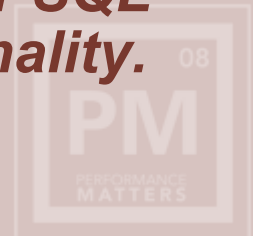
Left Table Comments:  
[Text Input]

Right Table Comments:  
[Text Input]

Error Messages: [Text Input]

# Using Our Custom Application

- **Columns Tab**
- **Using the “Columns” tab, you will be able to view any individual field for either PIDM in the last table highlighted in the “Tables” tab.**
- **You also have the ability to update any individual field. This will come in handy if you are attempting to merge data that features sequence number fields.**
- **For example, if you wanted to copy a second Admissions application from one PIDM to the other and both applications were application “1” for the student, you can update all of the application data for the second PIDM to become application “2” and then move the data to the first PIDM.**
- ***If you've ever tried to do this manually using Toad or SQL Navigator, you will definitely appreciate this functionality.***



# Using Our Custom Application

Biographical Tables Columns

149090 - 199710 - GM - I - null - null - 3 - 3 - 3 - 12 - 4 - 9/23/2005 16:9:3 - 3

290133 - 200810 - GM - T - 1 - 1 - 0 - 3 - 0 - 0 - 0 - 2/4/2008 14:37:28 - 3

Pidm 1 Tables: 149090

Count: 39

- SATURN.SHRGCOL
- SATURN.SHRGPAC
- SATURN.SHRGPAL
- SATURN.SHRLGPA
- SATURN.SHRTCKD
- SATURN.SHRTCKG
- SATURN.SHRTCKL
- SATURN.SHRTCKN
- SATURN.SHRTGPA
- \*\* SATURN.SHRTGPA\_061605
- SATURN.SHRTMCM
- SATURN.SHRTTRM
- SATURN.SHTTRAN
- SATURN.SORLCUR
- SATURN.SORLFOS
- SATURN.SPBERS
- \*\* SATURN.SPBERS\_01\_04\_07
- SATURN.SPRADDR
- \*\* SATURN.SPRADDR\_01\_04\_07

Row: 5 of 5

Next

Prev

Pidm 2 Tables: 290133

Count: 14

- GENERAL.GOREMAL
- SATURN.SARADAP
- SATURN.SARCHKL
- SATURN.SHRLGPA
- SATURN.SHRTGPA
- SATURN.SHRTRAM
- SATURN.SHRTRCE
- SATURN.SHRTRCR
- SATURN.SHRTRIT
- SATURN.SORLCUR
- SATURN.SORLFOS
- SATURN.SPRADDR
- SATURN.SPRIDEN
- SATURN.SPRTELE

Row: 1 of 1

Next

Prev

Left Table Comments:

Term GPA Table

Right Table Comments:

Term GPA Table

Error Messages: At last row!

# Using Our Custom Application

Biographical Tables Columns

Pidm 1: 149090 - MA - 1 - null - null - 2049 Century Park East - null - null - Los Angeles - CA - 90067 - null - US - null - null - null - null - null - null - 11/19/2002 0:0:0 - CONVERT - null - null - null - null - null - null -

PIDM 1: 149090

- SPRADDR\_PIDM
- SPRADDR\_ATYP\_CODE
- SPRADDR\_SEQNO
- SPRADDR\_FROM\_DATE
- SPRADDR\_TO\_DATE
- SPRADDR\_STREET\_LINE1
- SPRADDR\_STREET\_LINE2
- SPRADDR\_STREET\_LINE3
- SPRADDR\_CITY
- SPRADDR\_STAT\_CODE

Pidm 1 Column View: 149090  Update Enabled  
 Update Disabled

Update Column:   
Update

Internal identification number of person.

Pidm 2: 290133 - MA - 1 - 7/26/2005 0:0:0 - null - 2049 Century Park East - null - null - Los Angeles - CA - 90067 - null - null - null - null - null - null - 7/26/2005 0:0:0 - MARGARET\_KEANE - null - null - nu

PIDM 2: 290133

- SPRADDR\_PIDM
- SPRADDR\_ATYP\_CODE
- SPRADDR\_SEQNO
- SPRADDR\_FROM\_DATE
- SPRADDR\_TO\_DATE
- SPRADDR\_STREET\_LINE1
- SPRADDR\_STREET\_LINE2
- SPRADDR\_STREET\_LINE3
- SPRADDR\_CITY
- SPRADDR\_STAT\_CODE
- SPRADDR\_ZIP

Pidm 2 Column View: 290133

Update Column:   
Update

Internal identification number of person.

Error Messages:



# Summary

- **Duplicate PIDs**
  - Duplicate PIDs are a problem that doesn't seem to go away.
  - SunGard's Common Matching does help...but you need your end users to use it!
- **Our Application**
  - It's Java.
  - It's much better than the alternatives.
  - It's reasonably priced. :)



# Questions & Answers

- Hope you enjoyed the presentation!
- Any questions?



# Code Download

- **We have created a web site so that you can download our custom code:**

<http://www.manhattan.edu/summit2008>

- **Please test the code in a test environment first!**



# Thank You!

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**Course ID S-0008**

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