PeopleSoft Campus Solutions
Campus Community Search/Match   PeopleSoft 9.0

Performing Search/Match under Campus Community (Persons)

Before creating a new EmplID (WesID), it is *essential* that you verify that the individual does not exist in the system. There can be no duplicates within SFIS. If a preliminary search indicates the individual does not exist in the database, investigate further using the Search/Match process.

Starting the Search:

To begin the process, navigate as follows:
Campus Community > Personal Information > Search/Match

1. On the Find an Existing Value page, click the yellow **Search** button.

2. Select Search Type of "Person".

3. The Search Criteria page opens. Note that the Search button on this page is grayed out at this point. The top of the page looks like this:

4. The first time you perform a Search/Match, in the box headed "Search Result Rule," click the
    <u>User Default</u> link. Click the magnifying glass. Select WES_PERS_RSLTS and click OK.
    That portion of the page will now appear as follows. (You won't be required to enter this
    value again once this page has been saved.)

5. In order to perform the search/match function, you must enter data in at least the Last Name
    Search field, as well as any other information available that will narrow your search. <u>Tab out</u>
    of the field to have the system acknowledge the entry.

6. Once you have tabbed out of the field, the grayed out Search button will turn yellow. Click the **Search** button.

Important: Enter all information that is available in order to prevent creating a duplicate record.

Following the Search:

A.   No Match Found

If there is no match found, a message will pop up:
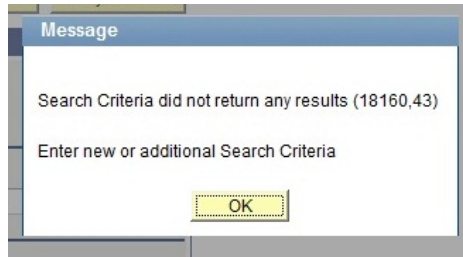
Click OK and return to the main menu. You may enter the new information into PeopleSoft.

B.   Results Found

If there is a match, the Search Results page will open, displaying any potential matching records. To see additional data relating to the person, click on the Results 2 and Additional Information tabs (or click ![icon] to see all of the data).

Review the data of the matches to determine if the individual has an existing EmplID.

1.   To see more details, click on the Detail link and the "Add/Update a Person" page will open in a new page.
2.   On the "Add/Update a Person" page, you can review and compare the Biographical Details and Addresses.
3.   If all matches are deemed inappropriate, follow the steps to enter the individual's data.

> Additional note about the Search/Match Result page: To reduce the number of matches, go back to the Search/Match page and complete any additional fields that you can. (Remember to tab out of field prior to clicking on the Search button.)