

# STOP!!

## ✓ SEARCH

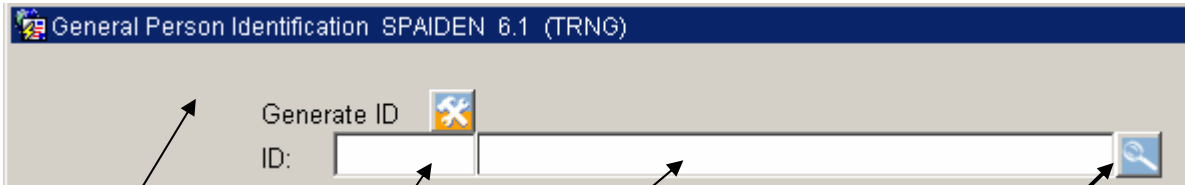
## ✓ CONFIRM

## ✓ PROCEED

Whether creating a record for a person, vendor, or organization, it is critical that duplicate records are not created in the Banner database. Duplicate records can result in incorrect reporting, multiple student billings, the production of multiple W-2s, etc. Performing an extensive ID/Name search for a person's, vendor's, or organization's record prior to the creation of a new record is extremely important. On the next page is the 7-step search process that must be followed prior to the creation of any new record in

Banner.

### ID/Name Fields:



SPAIDEN

ID Field

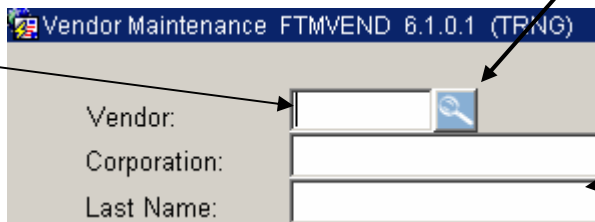
Name Field

By selecting these search buttons,

you **will NOT** get the recommended **Extended Search window**. (For use of this button, see pg.8)

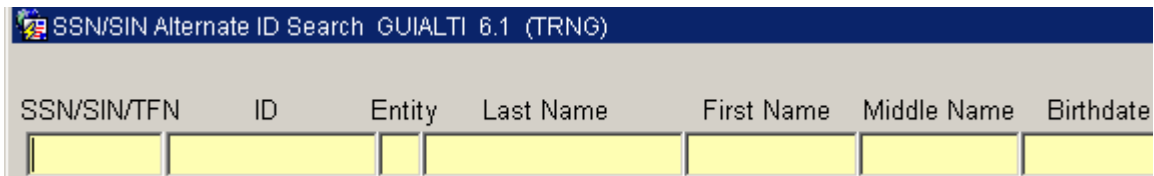
ID Field

FTMVEND



Name Field

GUIALTI



# Steps for Searching

## Step 1: Search by Social Security Number

- Open the GUIALTI form. If you do not have access to this form, proceed to Step 2.
- Enter the person's social security number in the SSN field and press F8 to run a query.
- If there is a match on the social security number, the person's name, as well as other information, will appear in the row and you have completed your search.
- If no match is found, proceed to Step 2.
- You can perform Steps 1-7 with GUIALTI form access. Without this access, use either SPAIDEN or FTMVEND forms.

## Step 2: Search by Full ID

- Open the SPAIDEN form.
- Enter the person's entire ID into the ID field and press the Enter key.
- If there is a match on the ID, the person's name will appear in the name field and you have completed your search.
- If no match is found, proceed to Step 3.

## Step 3: Search by Full Name

- Make sure ID field is blank. Press the Tab key on your keyboard to move the cursor to the name field.
- Enter the person's full name in the name field and press the Enter key. (Type the last name followed by a comma, and then type in the first name. Example: Smith, Mary. This search feature is not case sensitive.)
- If one match is found, the person's name and ID are returned to the form.
- If more than one match is found, the **ID and Name Extended Search** window appears. See page 4 of this document for more details on the extended search window.
- If no matches are found, proceed to Step 4.

## Step 4: Search by Partial ID

- Enter a partial ID into the ID field, using the Oracle wildcard % for any number of unspecified characters and press the Enter key. Example: 21%
- If there is one match on the partial ID, the person's name and full ID are returned to the form and you have completed your search.
- If more than one match is found, the **ID and Name Extended Search** window appears. See page 4 of this document for more details on the extended search window.
- If no match was found, proceed to Step 5.

## Step 5: Search by Partial Name

- Make sure the ID field is blank. Press the Tab key on your keyboard to move the cursor to the name field.
- Enter the person's partial last name in the name field using the Oracle wildcard % for any number of unspecified characters and press the Enter key. (This search is not case sensitive.)  
The format for searching using the name field is last name, first name, and middle name, with a comma between each part of the name. Spaces are optional.

(Steps Cont'd on next page)

Examples: smith, J% will return all ID's with last names "smith, first names starting with "J"  
mag%, p% will return all ID's with last names starting with "mag," first names starting with "P"  
%,Barbara will return all ID's with first name "Barbara"

- If one match is found the ID and name are turned to the form.
- If more than one match is found, the **ID and Name Extended Search** window appears. See page 4 of this document for more details on the extended search window.
- If no match was found, you should repeat Step 6, searching other variations of the partial name.

#### **Step 6: Search by Nicknames/Short names**

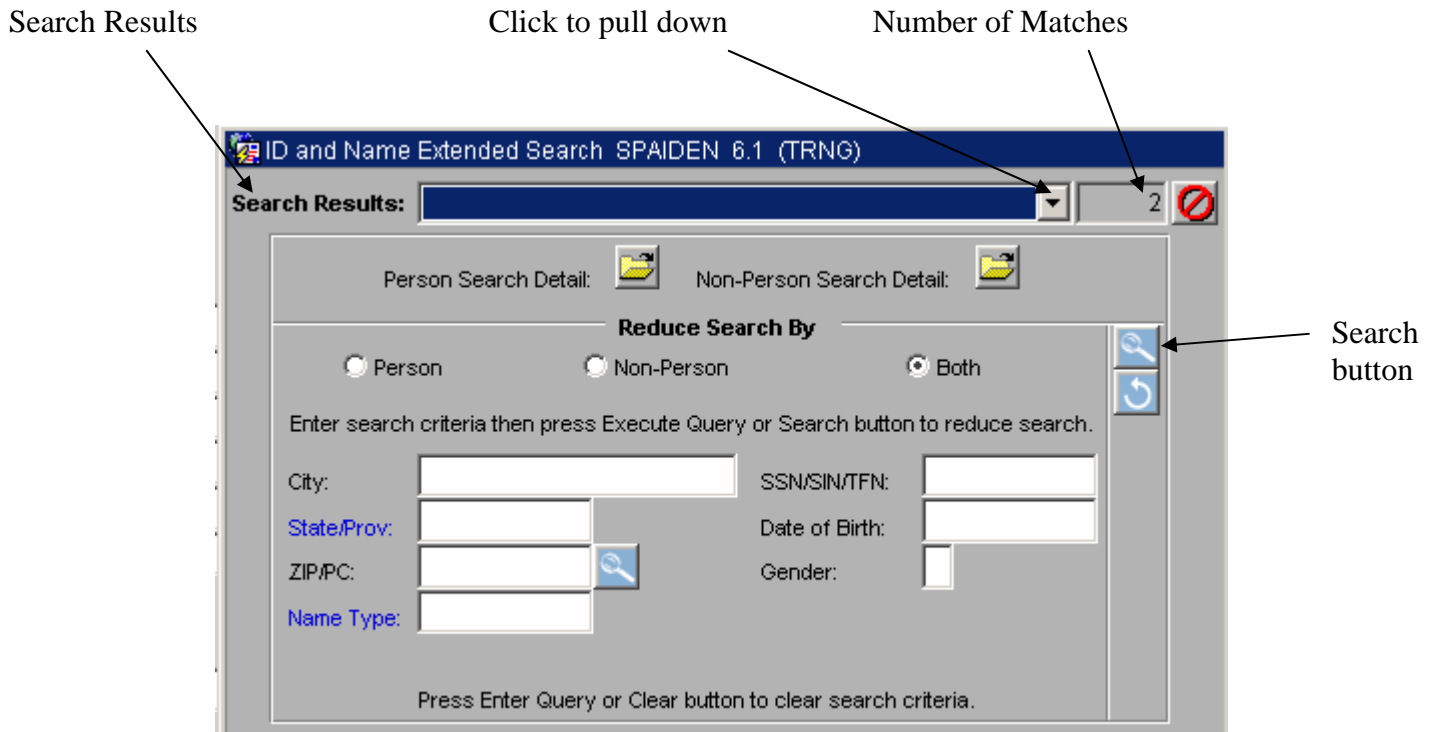
- Make sure ID field is blank. Press the Tab key on your keyboard to move the cursor to the name field.
- Enter the person's nickname or an abbreviated form of the name (i.e., Robert=Rob, Bobby, Bob)
- If one match is found, the person's name and ID are returned to the form.
- If more than one match is found, the **ID and Name Extended Search** window appears. See page 4 of this document for more details on the extended search window.
- If no matches are found, proceed to Step 7.

#### **Step 7: Search by Birthdate** (This can be conducted from GUIALT1 or Extended Search)

- Press the Tab key on your keyboard to move the cursor to the birthdate field.
- Enter the birthdate in the birthdate field and press the Enter key.  
(Use the following Date Format for this field: 01-AUG-1989)
- If one match is found, the person's Social Security number, ID number, and Name are returned to the form.
- If more than one match is found, information on all matches will be listed.

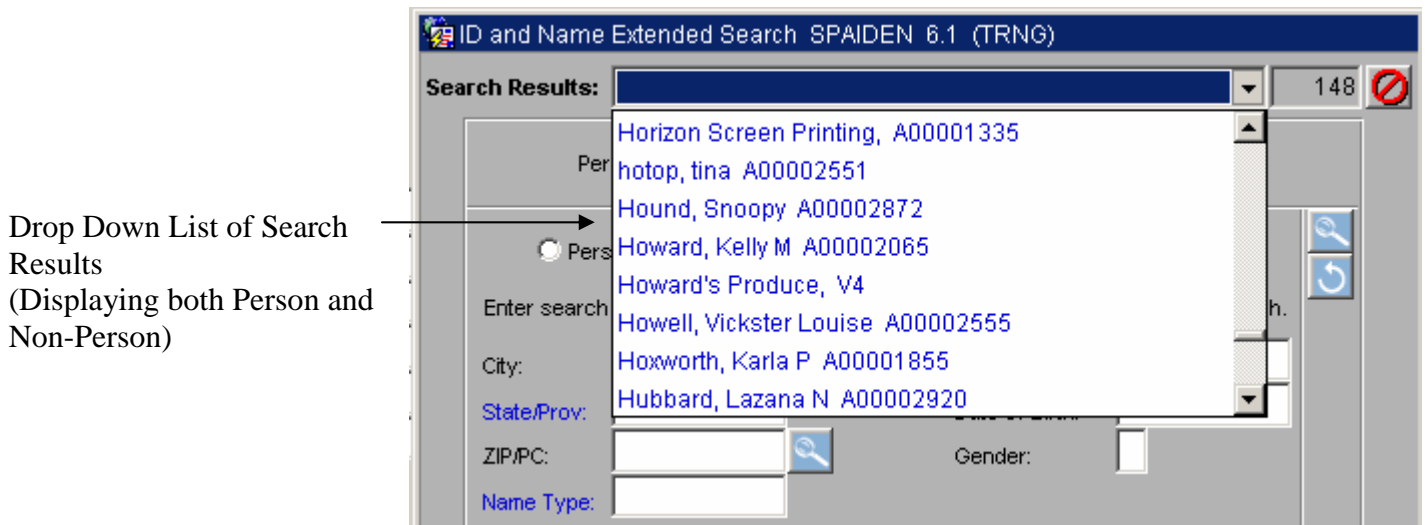
After a exhaustive search using the seven steps above to search for a person in Banner, if the person is not found, it is now evident the person does not exist in the Banner system and can now be added.

# ID and Name Extended Search Window:



The field to the right of the **Search Results** field shows the number of matches that matched your search criteria. To select an ID/Name from the multiple matches, follow the procedure below:

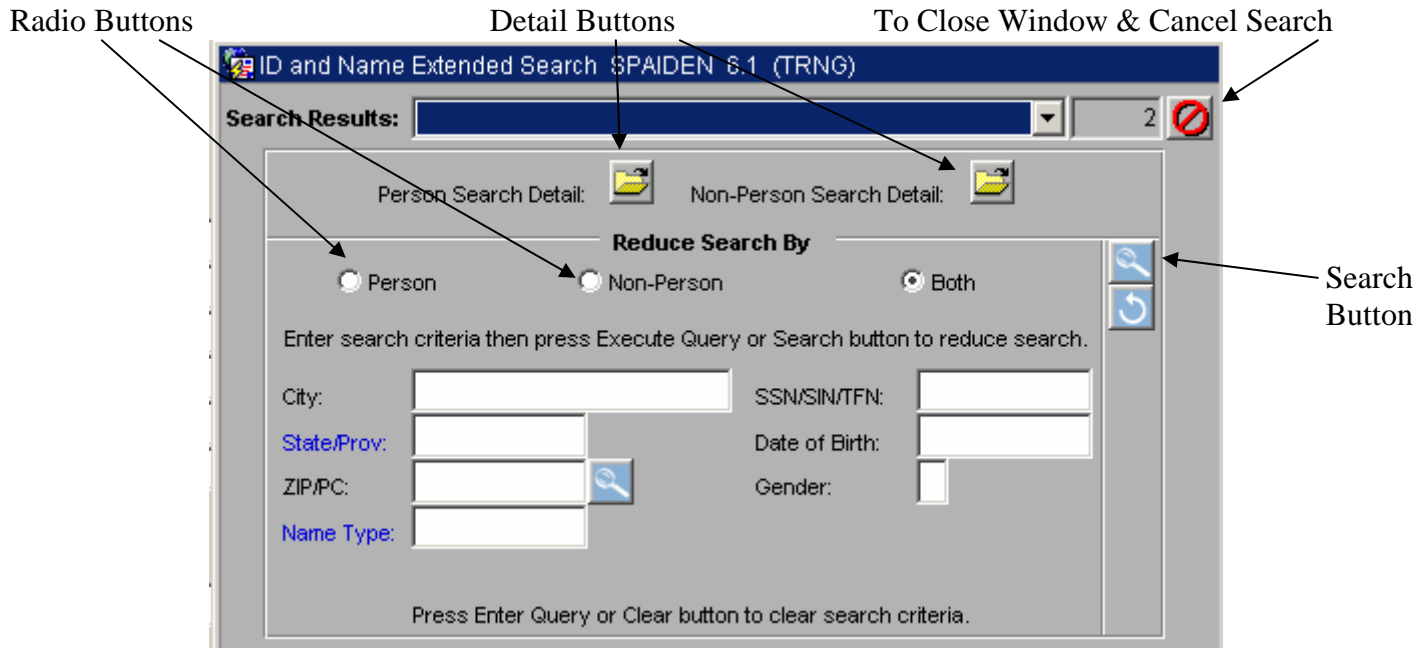
- Display the list of matches by click the **Down arrow** in the **Search Results** field.  
**Note:** Previous names and IDs are indented under the current name and ID.
- Scroll to the desired name and ID.
- Click the desired name and ID. The name and ID are placed in the form.



# Advanced Uses of the ID and Name Extended Search Window:

You have the following options to further reduce your search results using the **ID and Name Extended Search** window:


- Select the radio button for **Person**, **Non-Person** or **Both** to reduce the search results.
- To further narrow your search, enter as many criteria as you have available in the **Reduce Search By** window and click the **Search** button

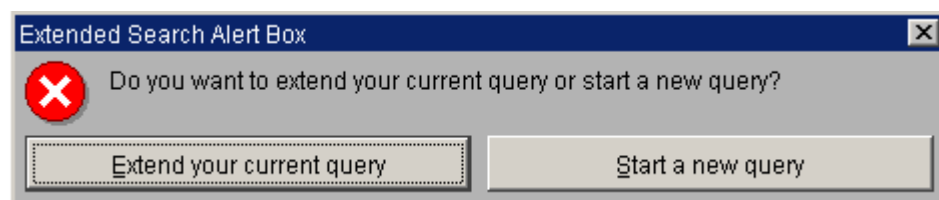


**Note:** The more search criteria used, the smaller your return list.

The **Search Results drop down list** will limit your search based on the search criteria entered.

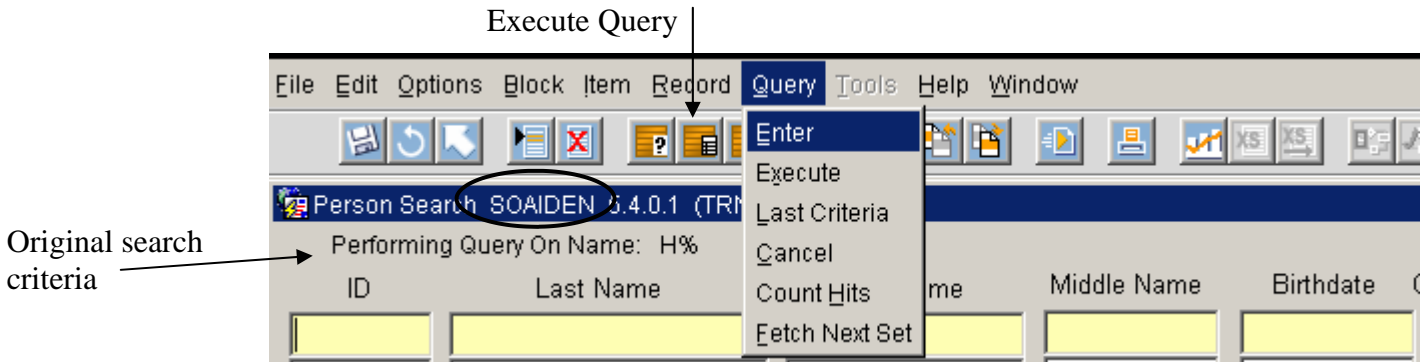
## Person/Non-Person Search Detail:

- If you click the **Person Search Detail** button, this will open the SOAIDEN search form. The IDs and names that are displayed on this form will match your original search criteria, therefore providing results not using the data entered in the **Reduce Search By** window.
- If you click the **Non-Person Search Detail** button, this will open the SOACOMP search form. The IDs and names that are displayed on this form will match your original search criteria, therefore providing results not using the data entered in the **Reduce Search By** window.
- From the  SOAIDEN or SOACOMP form, you can refine your search by clicking on the **Enter Query** Button. The following dialog box will appear:




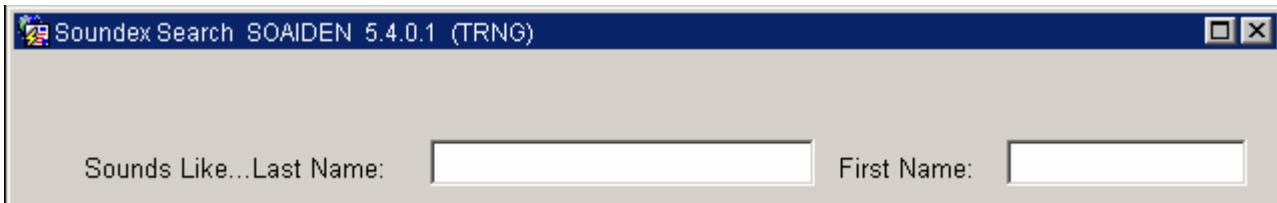
Click the **Extend your current query** button to add additional criteria to your search or click the **Start a new query** button to discard the original search criteria and start a new search. After you click on one of the buttons in the dialog box, the form is cleared. If you are adding additional search criteria, the original search criteria will remain at the top of the form. You can now enter your new or additional criteria in the desired fields, using the *Oracle* wildcard (%) where appropriate.

Once in the SOAIDEN or SOACOMP form, click on **Query** from the menu, click on **Enter** from the drop down menu.



### Search Using “Sounds Like:”

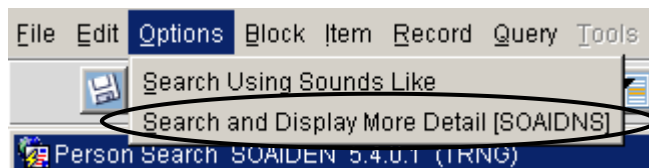
You may search for a word that “sounds like” another. In the SOAIDEN form, click on **Query** from the menu, click on **Enter** from the drop down menu. From the dialog box, click on the **Start a new query** button. Type a name in the appropriate name field. Click on the **Execute Query** button.  Click on **Options** from the menu, click on **Search Using Sounds Like**. Type the name which matches the pronunciation. Click on the **Execute Query** button.




### Search and Display More Detail:

If you choose **Search and Display More Detail**, the SOAIDNS form will appear. SOAIDNS gives you detailed information associated with the chosen ID to further help you confirm that you have found a match on the person you were searching.

From the SOAIDEN form, click on **Options**, click on **Search and Display More Detail**.



File Edit Options Block Item Record Query Tools Help Window powered by 

Person Search Detail SOAIDNS 5.2 (TRNG)

ID Number	Last Name	First Name	Middle Name	Birthdate	Sex	Ch
A00003060	Henckell	Allison	R		N	
A00003059	Henckell	Audrey	R	26-OCT-1986	F	
A00003063	Henckell	Audrey				
A00001393	Henckell	Mary	Martha		N	

Terms Reg

Soundex Search

Sounds Like... Last:  First:

General Student


Term	Status	Level	Type	Degree	College	Major	Adm	Res	Admit Term	Activity Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Address Information

Type	Street	City	St/Prov	ZIP/PC	Phone No.
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

From this form, execute a query to display additional information pertaining to the person shown. After executing a query, you can also conduct a **“Sounds Like”** function. In addition, by selecting one of the listed IDs or Name, you will be shown additional information which should aid in confirming that you have found a match on the person you were searching.

# Searching for a Person Using Specific Search Forms:

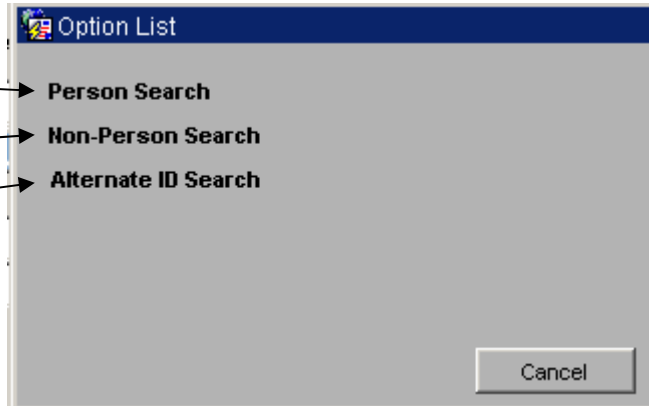
If the **Search** button  was clicked while in the SPAIDEN, FTMVEND or a module specific form that performs a search of the database for a person, vendor, or organization record, the following window will appear:


## Possible Forms Returned:

SOAIDEN

SOACOMP

GUIALTI



In any of the search forms listed above, you will be able to enter additional search criteria to reduce the number of listed subjects returned. Once the search criteria has been added, click on the  **Execute Query** button.

If you do not want the search to be case sensitive, make sure you click **No** on the bottom left of the form if the question, "Case Sensitive Query?" is an option.

