



Banner 2000 Software Support and Training

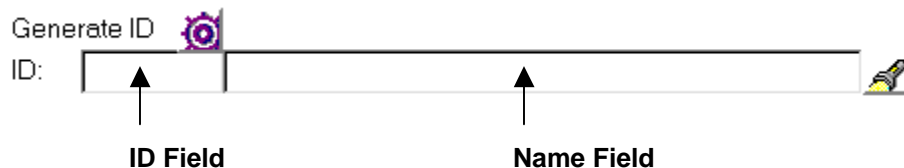
Banner 2000 Search Procedure Manual

Searching for a Person in Banner:

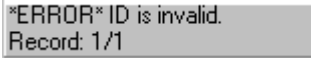
Performing an extensive ID/Name search for a person's record in Banner is extremely important. Below is the 4-step search process that must be followed for every person search performed in Banner.

The search procedure can be used on any Banner form that contains an ID/name field.

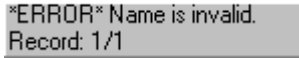
ID/Name Fields:



Step 1. Search by **Full ID.**

- ▶ Enter the person's entire ID into the ID field and press the enter key on your keyboard.
- ▶ 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 was found the following message will appear in the Status Line  and you must proceed to Step 2.

Step 2. Search by **Full 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 full name in the name field and press the enter key on your keyboard. (Enter the last name followed by a comma, and then enter 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 3 of this document for more details on the extended search window.
- ▶ If no matches are found the following message will appear in the Status Line  and you must proceed to Step 3.

Step 3. 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 on your keyboard.
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 3 of this document for more details on the extended search window.

- ▶ If no match was found the following message will appear in the Status Line and you must proceed to Step 4.

ERROR ID is invalid.
Record: 1/1

Step 4. 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 on your keyboard. (This search feature 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.

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 returned to the form.
- ▶ If more than one match is found, the **ID and Name Extended Search** window appears, see page 3 of this document for more details on the extended search window.

- ▶ If no matches are found the following message will appear in the Status Line and you should repeat step 4, searching other variations of the partial name.

ERROR Name is invalid.
Record: 1/1

If after an exhaustive search using the four steps above to search for a person in Banner, the person is not found, it is now evident that the person does not exist in the Banner system and if appropriate the person can now be added to the Banner system.

ID and Name Extended Search Window:

Search Results

Click to pull down

Number of Matches

Options

Bio/Demo Information

Current Name/ID

Appointments and Contacts

System Data Summary

Identification Form SPAIDEN 4.1 [cTRNG]

ID and Name Extended Search SPAIDEN 4.1 [cTRNG]

Search Results: [dropdown] 21

Person Search Detail: [icon] Non-Person Search Detail: [icon]

Reduce Search By

Person Non-Person Both

Enter search criteria then press: Execute Query or Search button to reduce search.

City: [text box] SSN/SIN/TFN: [text box]

State/Prov.: [text box] Date of Birth: [text box]

ZIP/PC: [text box] Gender: [text box]

Name Type: [text box]


Press Enter Query or Clear button to clear search criteria.

Non-Person Name Information

Name: [text box]


ID number; LIST for person; COUNT HITS for non-person; DUP ITEM to generate ID.
Record: 1/1

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:

- ▶ Pull down the list of matches by clicking on the Down arrow  in the **Search Results** field.
Note: Previous names and ID's 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 returned to the form.

Advanced Uses of the ID and Name Extended Search Window:

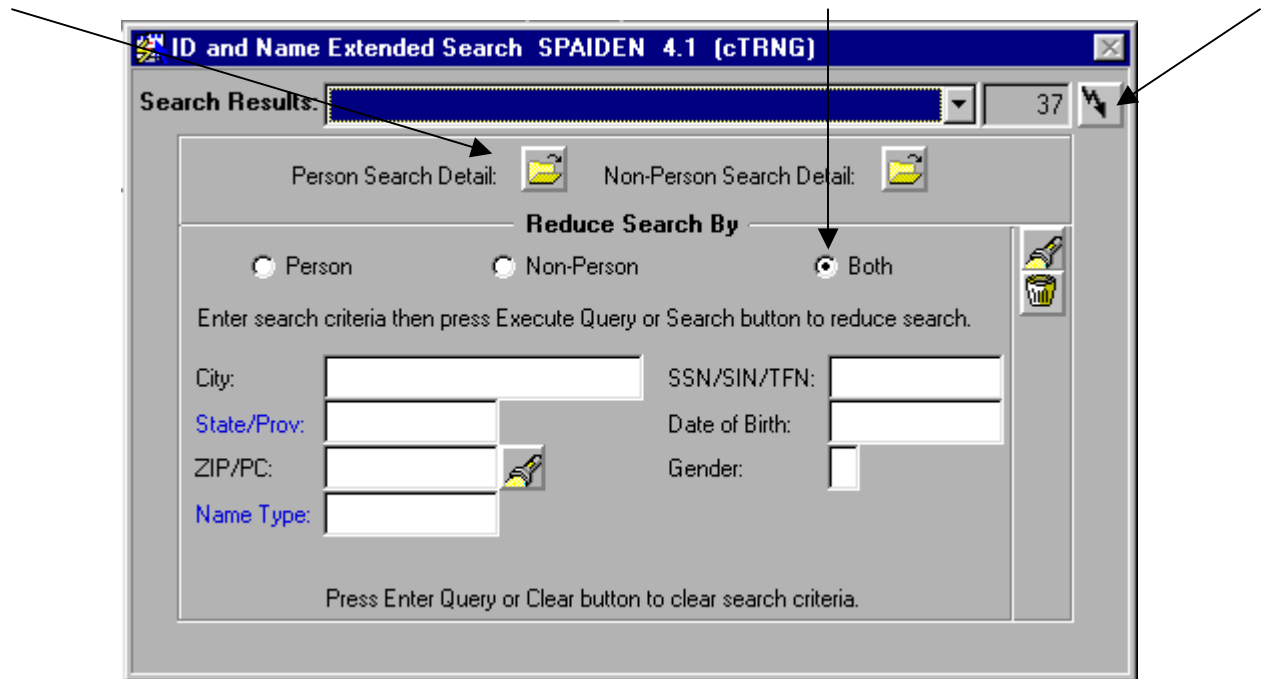
You have the following options to further reduce your search results using in the **ID and Name Extended Search** window:

- Select the radio button for **Person**, **Non-person** or **Both** to reduce the search results.
- Enter your search criteria in the any of the fields in the **Reduce Search By** window and click the Search Button () to execute the query.


Detail Buttons

Radio Buttons

Click here to close.




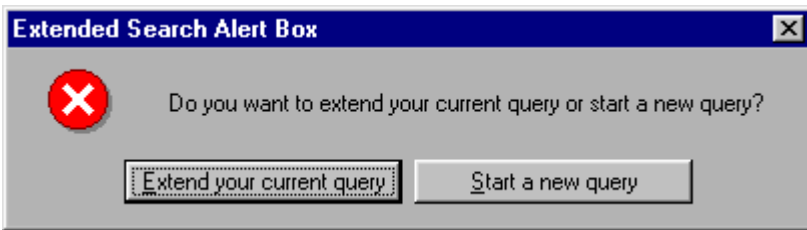
To access a specific search form from the **ID and Name Extended Search** window, click the

Person Search Detail button  to access SOAIDEN.
or


click the **Non-Person Search Detail** button  to access SOACOMP.

The associated search form will appear, either SOAIDEN or SOACOMP.

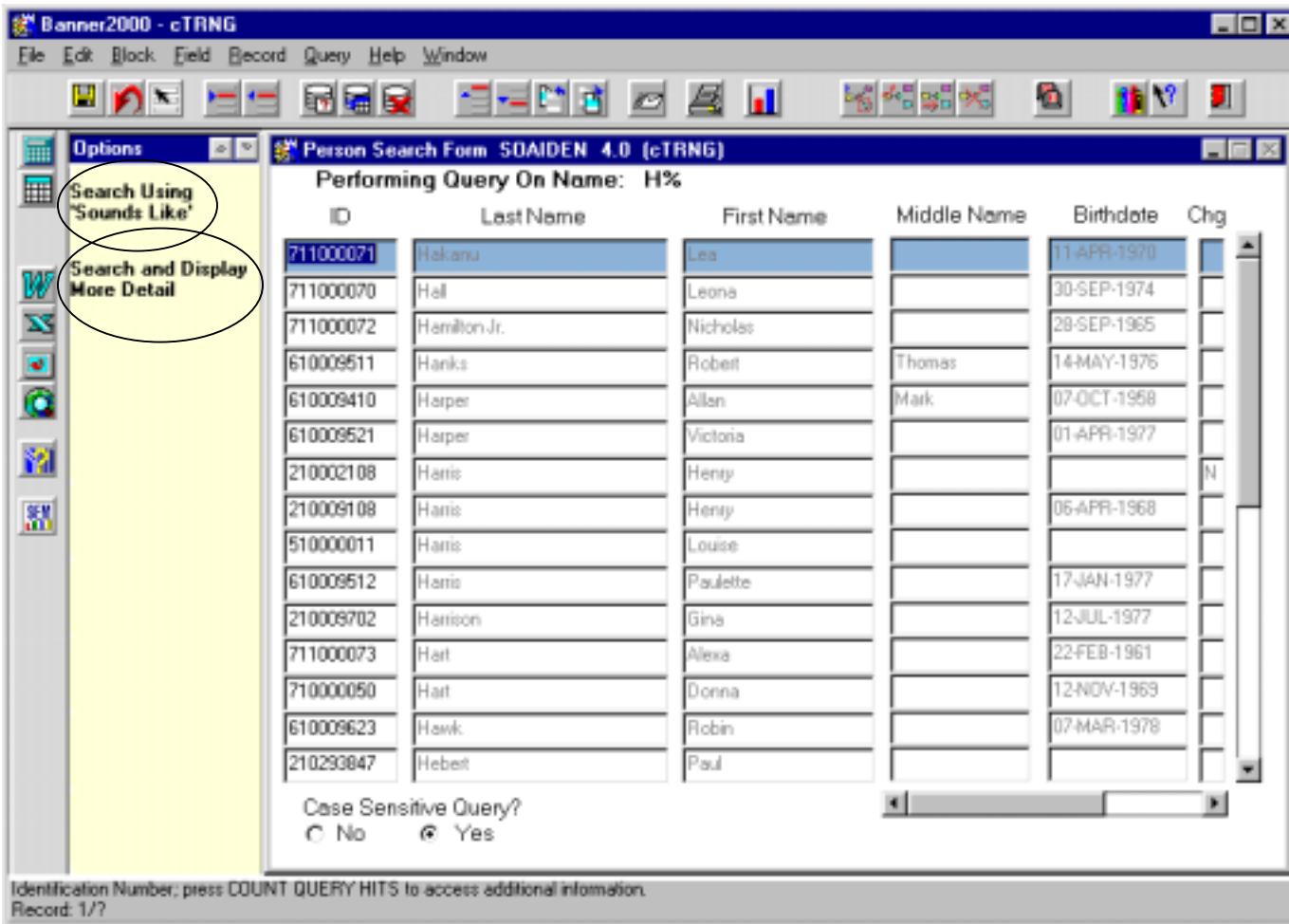
The ID's and Names that are displayed on the form match your original search criteria. If you want to refine your Search, perform an **Enter Query** function . The following dialog box will appear:



Click the **Extend your current query** button to add additional criteria to your search or click the **Start a new query** button to discard original search criteria and start a new search.

After you click on of the buttons in the dialog box the form is cleared. If you are adding additional search criteria, the original search criteria 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, and perform an **Execute Query** function, .

You may also choose **Search Using “Sounds Like”** or **Search and Display More Detail** from the Options in the Navigation Pane to the left of the form.



If you choose to search by **Sounds Like** the following window will appear on the search form. As long as the first letter of the name search is correct, you will retrieve names with a similar pattern of characters.

Soundex Search SOAIDEN 4.0 (cTRNG)

Sounds Like...Last Name: First Name:

If you choose **Search and Display More Detail** the form SOAIDNS 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.

Banner2000 - cTRNG

File Edit Block Field Record Query Help Window

Options Add Person to Database

Person Search Detail Form SOAIDNS 4.0 (cTRNG)

ID Number	Last Name	First Name	Middle Name	Birthdate	Sex	Ch
711000071	Hakaru	Les		11-APR-1970		

Terms Reg Soundex Search

Sounds Like... Last: First:

General Student


Term	Status	Level	Type	Degree	College	Major	Adm	Res	Admit Term	Activity Date

Address Information

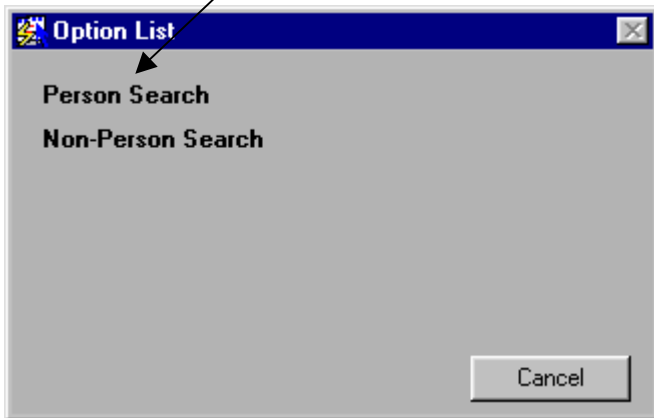
Type	Street	City	St/Prov	ZIP/PC	Phone No.
PR	68 Tiki Place	Papaaloa	HI	96780	808 2029583


Identification Number.
Record: 1/1

Searching for a Person Using Specific Search Forms:

You can use product-specific search forms such as SOAIDEN to search the database for a person's record. The search procedure can be used on any Banner form that contains an ID/name field. (As shown in Figure 1 on page 1 of this document.) Click the search button () that appears to the right of the name field.

If there is more than one search option, an Option List window will appear. Single click on **Person Search**.



When the search form appears, enter your search criteria and perform an **Execute Query** function (). Double click the desired ID and the name and ID will be returned to the calling form. You can search for a person using by ID, Last Name, First Name, or Middle Name. If you do not want the search to be case sensitive make sure you click **No** on the bottom left of the form to the question, Case Sensitive Query?

