HOW TO SEARCH IN BANNER

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REVISION HISTORY

Version	Date	Name	Description
1.0	11/30/15	Teri Eckman	Final

INTRODUCTION AND PURPOSE

Information on how to perform a search in Banner and Banner 9 (XE).

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. Not Applicable

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Any Banner User

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Banner Training (bannersbxe.ucr.edu) to follow along. You should complete the Banner Navigation Tutorial before reviewing this document.

A **Person**, refers to an individual in the Banner system with a name and identification number. A Person could be a student, staff, faculty, or third-party.

FORMS

The forms listed below are covered in this training.

| Form	Form Name	Description

PROCEDURES

BANNER 8 – SEARCHING FOR A PERSON BY ID OR NAME

Most of the work that you will do will be in Banner 8, oftentimes referred to as Banner INB (Internet Native Banner). There are a number of forms in Banner that require you to locate a person (employee, applicant, student, etc.) prior to viewing any information.

STEPS

1. Type the **ID** of the person you are looking for in the ID field or press the **Tab** key to navigate to the **Name** field and type their name.
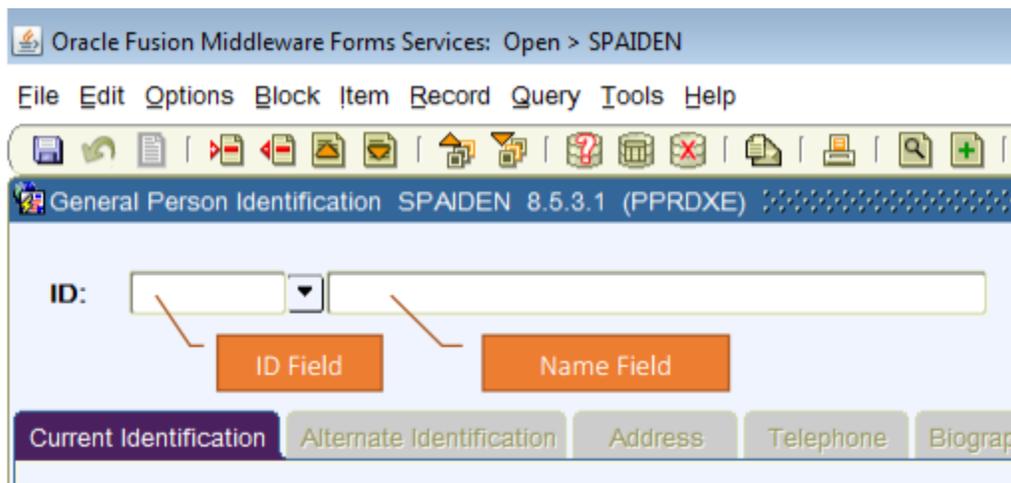
a. The name format on this form is Last, First. You can use wildcard characters to streamline your search. A wildcard is a special character that represents one or more other characters. Use wildcard symbols % and _ in the search criteria.

% (percent sign) represents any number of characters

_ (underscore) represents one occurrence of a character

To get these results...	Enter these criteria...
All entries that contain "sm"	%sm%
All entries that begin with "sm"	sm%
All entries that end with "sm"	%sm
All entries that have m as a second character	_m%

The UCR Data Standards require that you search using the percent sign (%) after all names. Using this technique, you can find names with generational designators such as Jr., III, and any hyphenated names.

2. Press the **Enter** key on the keyboard
    a. If there is only one match to your search, the system will automatically fill in the **ID** and **Name** fields with the matching person's ID and name.

3. The **Extended Search** box displays the results of your name search. Click to select the name you want to work with from the **Results** field drop-down list.
    a. When you see a name indented under another name, the indented name is an alternate name (e.g. maiden name) for the name above it.
    b. There should be no duplicate records for a person. Duplicates should be reported to the Office of Admissions who will route to the appropriate office for correction.
    c. Alternatively, if there are too many names in the **Search Results** field, narrow the search using other person information, such as city, state/province, zip code/postal code, social security number, date of birth, and gender. When you are finished, click the **Reduce Search** button.

4. Once you have found the record you are looking for and you select it, the system will automatically fill in the **ID** and **Name** fields with the matching person's ID and name.
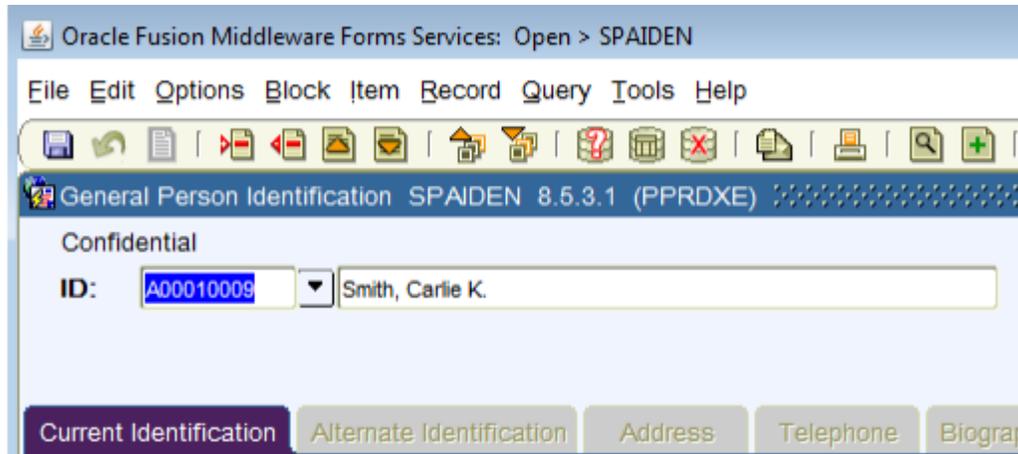
CHECK YOUR UNDERSTANDING

1. Which wildcard symbol would you use to find a person whose last name began with McD?
   a. _McD
   b. %McD
   c. *McD

   Answer: (b) - %McD.

2. Which option is the best way to find a person whose last name ends with "ely"?
   a. %ely%
   b. %ely
   c. ely%

   Answer: (b) - %ely.

BANNER 9 (XE) SEARCHING OPTIONS

A VERY LIMITED NUMBER OF USERS WILL BE REQUIRED TO USE BANNER 9. THIS MATERIAL WILL BE COVERED IN MORE DETAIL WITH THOSE STAFF WHO NEED TO ACCESS BANNER 9 (XE). IT IS INCLUDED HERE FOR REFERENCE ONLY.

Users who are administrators and faculty members or advisors can search on student names or Banner IDs for a term on the Select a Term page in Self-Service. This allows the user to perform a quick search on a student for a term without leaving the page and then continue with registration. The search criteria displayed changes depending on the user's persona type code, such as REGISTRAR, FACULTY, ADVISOR, or FACULTY AND ADVISOR.

The Registrar or administrator can enter a partial ID and view a list of results. The Registrar can then change the term for the student, change the study path for the student, or change both and proceed with registration. The user who is either a faculty member, an advisor, or both, can also enter a partial ID and view a list of results.

The faculty member or advisor may be limited to searching for their assigned students or advisees. The ALLADVR, ALLFAC, and REGADVISEE GTVSDAX rules for the FACWEB internal code group control whether the faculty member or advisor can search beyond their classes or advisees. The faculty member or advisor must enter the student's password to access the Self-Service registration pages.

The following fields in the **Schedule Search Controls in 8.x** are **not** displayed on the page in 9.x:

• Search by Schedule Type

• Search by Campus

• Search by Level

• Search by Course Attribute

• Search by Instructor

• Search by Session

• Search by Instructional Method

• Search by Duration (Open Learning Only)

The Schedule Search Controls section has been renamed Schedule Content Display Control. The following fields are still used and are displayed in this section in 9.x:

• Display Long Section Title

• Display Closed Section

• Display Long Section Description

BANNER 9 (XE) SEARCH PAGES

Advanced filter pages are available for searches on:

• Person Search Page (SOAIDEN)

• Person Search Detail Page (SOAIDNS)

• Non-Person Search Page (SOACOMP)

• SSN/SIN Alternate ID Search Page (GUIALTI)

• General Search Page (GUISRCH) - Telephone, Email, Additional ID

• Registration Section Query Page (SFQSECM)

These pages are documented in the Banner Student Online Help.

The SOAIDEN, SOAIDNS, SOACOMP, GUIALTI, and GUISRCH page have been redesigned as filter pages for use with specific data searches. The pages can be accessed from the ID fields on 9.x pages.

Fields have been added to SOAIDNS in the Registration Terms section for Enrollment Status, Enrollment Date, and Credit Hours and in the General Learner section for Status, and (Student) Type.

The Registration Section Query Page (SFQSECM) has been redesigned as a filter page for use with section searches for registration. This page can be accessed from SFASRPO.

BANNER 9 (XE) SEARCH TIPS

Here are some tips on how to use the person and non-person search functionality.

AUTOCOMPLETE ON ID AND NAME

When up to four characters are entered in the ID field or the Name field, the autocomplete function displays potential matches for the value entered. You can select a value to populate the ID field and Name fields. For the Name field, if a name or partial name is entered, the order of names returned is based on the matching order of last name, first name, middle name.

The autocomplete feature can be optionally disabled for the ID and Name fields using new rules on the Cross Walk Validation Page (GTVSDAX).

OPERATORS

When performing a person search using the Equals operator for the Last Name and First Name fields, the results returned are only for an exact match to the data entered, including spaces and special characters.

For example, if the Last Name equals Oleary, results would include Michelle Oleary but not Joseph O'Leary.

Other operators for first and last names generate results that include names with spaces and special characters, regardless of whether those spaces and/or special characters have been entered for the search. This is the case with the Contains operator. For example, if the Last Name contains Oleary, results would include both Michelle Oleary and Joseph O'Leary.

You can enter a pattern of characters in the Last Name and/or First Name fields and use the Sounds Like operator. This helps when you are not sure of the spelling of a name. As long as the first letter of the search string is correct, the results will return names with a similar pattern of characters.

SORT ORDER

Person search results are displayed based on the following sort order: Last Name, First Name, Surname Prefix, Middle Name, ID, and Change Indicator. This list of results can be resorted on a column of your choice.

WILDCARDS

You can use wildcards in the Name field for searches, but they are not required. The underscore wildcard cannot be used to search on names.

ID AND NAME RESULTS WINDOW

In addition to using the advanced filter and query results for searches, you can also use the ID and Name Results window to refine your searches for persons and non-persons and perform extended searches.

When you enter a full or partial ID in the ID field or a full or partial name in the Name field and use Enter or Tab, and more than one person or non-person record exists with that ID or name, the ID and Name Results window is displayed for extended searching. You can use wildcards in the Name field for searches, but they are not required. The underscore wildcard cannot be used to search on names.

When you enter data in the Name field, each space-delineated group of characters is used to search on last name, first name, and middle name. You do not have to enter the name parts in any specific order or with any punctuation. For example, if you enter Mary Jane Smith, the search performed will look for Mary as a last name, first name, or middle name that has Jane as a last name, first name or middle name, and that has Smith as a last name, first name, or middle name.

The ID and Name Results window displays the records for the persons and non-persons returned by the search. You can use the advanced filter in this window to further narrow down your results. You can sort on, hide, reorder, or freeze columns. A person or nonperson can be listed multiple times if alternate names or IDs exist. However, each person or non-person is only counted once. The count of total records, including alternate names and IDs, is displayed in the window.

You can select a record and click OK to populate the ID and Name fields in the Advanced Filter. Or you can adjust your search in this window by entering a different full or partial ID or name. Use Enter or Tab to perform the new search. For example, if you searched on the name of Smith and viewed your results, you could then enter Smythe and search again.