Person and Non-Person Searching Guidelines

Purpose:

This handbook introduces the basic, or general, person/non-person concept and details the steps necessary to search for a person or non-person and the importance of thorough searching before creating a new person/non-person record.

Introduction:

Basic Person identification forms (forms that end with “IDEN” such as SPAIDEN) are used throughout Banner to capture biographic and demographic information for all persons and non-persons associated with Connecticut College.

Identification Forms:

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Persons/non-persons are first entered into Banner using an identification form. (Which form is governed by your Banner security access.) The information in this form is specific to the person/non-person and does not relate to their involvement at the college. All other modules and applications are dependent on the information captured and maintained in this form. (I.e., we are all sharing that information.) Any changes or additions to a person's/non-person's biographic and demographic information must be made in this form.

Basic person (or general person) is a generic term that refers to people (persons) and companies (non-persons). Basic/general person information includes:

- Name/ID
- Address
- Telephone
- E-mail
- Biographical information

Before creating a person or non-person, it is important to be sure that an ID does not already exist. Banner does not prevent users from creating a new Banner ID for an existing person or business. When this happens, a duplicate PIDM, it will create a big headache for the user that entered the duplicate and for the programmer who has to fix it.
Search Methods:

There are 4 methods to search for a person or company in Banner using the ID and Name fields located in the Key Block of your form. **Before creating a new Banner ID, you should search thoroughly to be certain that the person/non-person doesn't already exist.**

1. **Search by ID**
   
Enter the entire Banner ID into the ID field and press the Enter key on your keyboard.
   
   - If there is a match on the ID, the name will appear in the name field and you have completed your search.
   
   - If no match was found, the message “ERROR ID is invalid” will appear in the Status Line.

2. **Search by Partial ID**
   
Enter a partial Banner ID into the ID field, using a percent (%) sign in place of unknown characters, and press the Enter key on your keyboard. The percent (%) sign is an Oracle wildcard which replaces any number of characters.

   **Ex. 1:** 310% - *returns all ID numbers that start with 310*
   
   **Ex. 2:** 310%880 – *returns all ID numbers that start with 310 and end with 880*

   - If there is 1 match on the partial ID, the name and full ID are returned to the form and you have completed your search.
   
   - If more than 1 match is found, the ID and Name Extended Search window appears (see Extended Search).
   
   - If no match was found, the message “ERROR ID is invalid” will appear in the Status Line.

3. **Search by Full Name**
   
   Leave the ID field blank. Enter the name in last name, first name order (last name and first name must be separated by a comma) in the Name field and press the Enter key on your keyboard (the name search is not case sensitive).

   - If 1 match is found the name and ID are returned to the form.
   
   - If more than 1 match is found, the ID and Name Extended Search window appears (see Extended Search).
   
   - If no match was found, the message “ERROR ID is invalid” will appear in the Status Line.
4. Search by Partial Name

Leave the ID field blank. Enter a partial name into the name field, using a percent (%) sign in place of unknown characters, and press the Enter key on your keyboard. The percent (%) sign is an Oracle wildcard which replaces any number of characters (this search feature is not case sensitive). The format for searching using the name field is last name, first name, middle name with a comma between each part of the name (spaces are optional).

**Ex. 1:** smith, j% - returns all ID’s with last name “Smith” and 1st name starting with “J”  
**Ex. 2:** mag%, p% - all ID’s with last name starting with “Mag” and 1st name starting with “P”  
**Ex. 3:** %, barbara- returns all ID’s with any last name and first name “Barbara”  
**Ex. 4:** %dell% - returns all ID’s with “dell” anywhere in the last name

- If 1 match is found the ID and name are returned to the form and you have completed your search.  
- If more than 1 match is found, the ID and Name Extended Search window appears (see Extended Search).  
- If no match was found, the message “ERROR ID is invalid” will appear in the Status Line.

Name Search Tips

1. Use the “%” sign to begin and end all last name queries:  
   Examples:  
   %Dyke%, D% to find Derek Van Dyke  
   %Miller%, Ma% to find Mary R. Smith-Miller

2. Use partial words when searching for names with Mc, Van, de, etc:  
   Examples:  
   %Guin% to find McGuinness  
   %Bol% to find de Bolt

3. Use partial words when searching for names that could be spelled differently:  
   Examples:  
   Tra% to find Tracey, Traci, Tracy  
   %ath% to find Kathryn, Katherine, Kathy, Catherine, Cathy  
   C% to find Cynthia, Cyndi, Cindy, Cindi  
   D% to find Dillon, Dylan, Dyllon

4. Use shortened names for formal names:  
   Examples:  
   Wil% to find William, Wilfred  
   Bill to find William  
   Rob% to find Robert, Roberta, Robby  
   Cathy or Ca% to find Catherine  
   Jim to find James
Extended Search:

The Extended Search window will appear for any search results that contain more than one possible match.

To select a person or company from the search results:

- Click on the drop-down arrow next to Search Results.
- Use the scroll-bar to scroll to the desired name.
- Click on the name (previous names and ID’s are indented under the current name and ID) and the name and ID will be returned to the form.
- If the person or company you are searching for is not in the list, use one of the advanced searches described below or click on the Cancel icon to close the Extended Search window and return to the form.
Advanced Uses of the Extended Search Window - Narrowing Down the Search Results

You can use the Extended Search window to narrow down the search results by other criteria such as Person/Non-Person, Date of Birth, Gender, City, State, etc.

- Click on the radio button next to Person or Non-Person in the Reduce Search By block.
- Enter additional search criteria in any of the Reduce Search by fields.
- Click on the Search icon and the updated number of search results will be displayed.
- Click on the drop-down arrow next to Search Results.
- Use the scroll-bar to scroll to the desired name.
- Click on the name (previous names and ID’s are indented under the current name and ID) and the name and ID will be returned to the form.
- If the person or company you are searching for is not in the list, click on the Clear icon to return to your original search results or click on the Cancel icon to close the Extended Search window and return to the form.

Viewing all Results in the Person or Non-Person Search Form

You can use the Extended Search window to view all of the search results on the Person Search Detail form (SOAIDEN) or the Non-Person Search Detail form (SOACOMP).

- Click on either the Person Search Detail button or the Non-Person Search Detail button to view the Search Detail forms. The ID’s and Names that are displayed on the form match your original search criteria.

When viewing either of the Search Detail forms, you can refine your Search.

- Enter Query and the Extended Search Alert box will appear.
- Click **Extend your current query**.
- Enter the additional search criteria on the search form, using % as a wildcard where necessary.
- Execute Query. The updated search results will be displayed.
- When you have located the person, double-click the ID number to return the Name and ID to the form.
Additional Search Forms

Any form with ID/Name in the Key Block can be used to start a search. Simply click on the Search icon and 1 or more of the following forms can be selected. You can also access these forms using Direct Access.

The **Alternate ID Search Form (GUIALT)** is used to search for a person by SSN, ID Number, Name and/or Date of Birth or a company by ID Number, TIN or Name.

The **Person Search Form (SOAIDEN)** is used to search for a person by Banner ID Number, Name and/or Date of Birth. From this form, you can use Options to access The **Person Search Detail Form (SOAIDNS)** to narrow down a search for a person.

The **Non-Person Search Form (SOACOMP)** is used to search for a company by Banner ID Number or Name.