

General Person and Non-Person Searching Guidelines

General Person and Non-person Overview: A General Person is any person or business having business with FAU. Students, faculty, and staff are considered a general person, while businesses, grant programs, research agency, etc, are examples of a non-person. A Person and non-person must have a record in Banner before *any other* data can be processed, such as paychecks, student records, vendor payments, etc. A General Person is independent of the Banner systems; a person/non-person may belong to any or all of the Banner systems

Searching Overview: Searching is a mandatory skill to ensure data integrity! Good searching techniques are important because Banner **will not prevent** users from creating duplicate entries for a single person or business. Please help us make sure that no one is entered into the Banner database more than once by searching the database to see if the record already exists! Conduct three (3) searches prior to creating a new record to avoid duplicate entries.



The steps for performing a name search differs from Banner system to system, using different forms to look for existing records and others to check address information. The following information applies to all systems:

1. If you have a person or non-person's ID, search that first. If that brings up any records, you can be sure the person or non-person is already entered into the system.
2. If you do not have a person or non-person's ID, search for the person (non-person) using the first few letters of each name followed by a wildcard character (%).

Wildcard Searches: In searching for a name, you can use the Banner wildcard characters. Using a wildcard character allows you to enter part of the name, search for a name with and without spaces, or search for a name that might have been spelled differently.

Banner has two wildcard characters: % and _. To Banner, the percent sign (%) stands for any letter, number, or symbol; or any group of letters, numbers, and symbols (see figure below for an example of using the % wildcard character). The underscore (_) can be used to replace one character at a time.

General Person Identification SPAIDEN 7.2 (STES)

ID: ▼ mou%, mi%

Wildcard Examples: To search for a name that may be Griffith or Griffin or Griffin-Myers, type in Griff% in the last name field and execute a query. Banner displays all names that begin with Griff. To search for an employee named MacDuff whose name might begin with Mc or Mac and might include a space or not, search %uff. TIP: The Wild Card may be used more than once in a field. For example, %good% will return: Goode, Thurgood, Goodyear, Begood-Marshall, etc.

Banner Tips

Do not forget last names may be hyphenated. For example: Chris Evert-Lloyd. You would search as follows: Evert% + Chris% (in case her real name is Christine)

Scenario: You need to find a General Person or Non-person to update their demographic or biographic data. Or, you need to add a new General Person or Non-person to Banner.

So how do you find the person's name?

Solution: Open the SPAIDEN form. Click the Drop down arrow next to the ID field. In the resulting Options List dialog box, click on Person Search.

Will open the SOAIDEN form

Will open the SOACOMP form

We are looking for Diana Jones. Enter Jones in the Last Name field. Not sure how she spells her first name, enter D% in the First Name field, as shown in the figure below. Press F8 to execute a search.

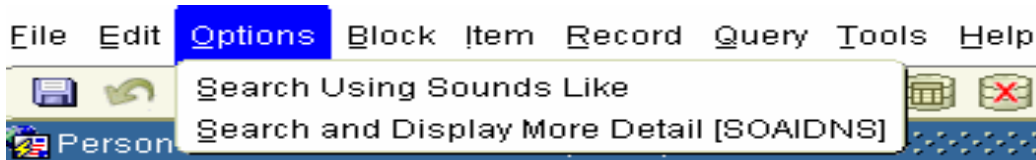
ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Type
	Jones	D%				

Banner Tips

Next, we want to find a person Michael Anderson, but are not sure about the spelling of Anderson. In this case, use the underscore (_) wildcard character as shown below.

ID	Last Name	First Name
	Anders_n	M%

To refine the search while on the SOAIDEN form, choose 'Search and Display More Detail' from the Options Menu, as shown below:



In the example below, we can see the General Student data and the Address Details for the first David Smith. Searching and displaying more details will help you select the correct person.

Person Search Detail: SOAIDNS 7.0 (STES)

ID	Last Name	First Name	Middle Name	Birth Date	Sex	Change Indicator
1	Smith	David	Larry	11	M	
2	Smith	David	Lee	11	M	

Soundex Search

Sounds like.....Last Name: First Name:

Registration Terms

General Student

Term	Status	Level	Student Type	Degree	College	Major	Admission Type	Resident	Admit Term	Activity Date
196701	AS	GR	C	NDEG	UN	NDEG		F	196608	15-APR-2003

Address Details

Type	Street	City	State or Province	ZIP or Postal Code	Phone Number
N1	Rr 1 Box 255	Burlington	NC	272159901	
PR	Rt 2, Box 176-A	Lake Worth	FL	33460	

Banner Tips

Using Extended Searching When you enter a name with a wildcard character on a form such as SPAIDEN, the resulting query can return a large number of entries. In the example below, 4,677 names were found that started with DA. To narrow the search down, using the Extended Searching feature. In this case, FL is specified as the state and the gender is specified as F.

The screenshot shows the SPAIDEN 7.2 (STES) application. The top window displays the search criteria: ID: da%. A callout bubble points to the search results count, 4677, stating: "Number of entries found". Another callout bubble points to the search criteria, stating: "We need to narrow down the search! Find a Female person from Florida". The bottom window shows the "ID and Name Extended Search" interface. It includes fields for "State or Province" (FL) and "Gender" (F). A callout bubble points to the magnifying glass icon, stating: "Click the Magnifying Glass to execute the extended search".

That resulted in 2,344 entries, which is still too many names to analyze. Enter more values, as shown below. In this case, we now have 7 results. We are looking for Sharon Daniel and have located her!

The screenshot shows the SPAIDEN 7.2 (STES) application. The top window displays the search results list. A callout bubble points to the name "Daniel, Sharon E", stating: "Select the person Then click their ID in SOAIDEN". Another callout bubble points to the search results count, 7, stating: "Number of entries found". The bottom window shows the "ID and Name Extended Search" interface. It includes fields for "City" (Boca Raton), "State or Province" (FL), and "ZIP or Postal Code" (33433). A callout bubble points to the LOV button, stating: "Click the LOV button to see results list".

Banner Tips

Multiple Records Banner may hold more than one record for the same person, but only one will be active. When a person changes their name, Banner registers the change. For example: Mary Smith marries and is now Mary Jones. The old information is kept in the database, which makes it possible to find someone using the old name. The record with the most recent name and ID information is active.

In the example below, there are two names for the same ID. Turns out Sharon married and changed her name!

The screenshot shows a search results window with a dropdown menu displaying two records for the same ID: 'Daniel, Sharon Z02327841' and 'Louiso, Sharon Elaine Z02327841'. Below the search results is a search criteria form with the following fields:

- Reduce Search By:
 - Person
 - Non-Person
 - Both
- Enter search criteria then press Execute Query or select button to reduce search.
- City: [Text Field]
- State or Province: [Dropdown]
- ZIP or Postal Code: [Dropdown]
- Name Type: [Dropdown]
- SSN/SIN/TIN: [Text Field]
- Birth Date: [Text Field]
- Gender: [Text Field]

At the bottom, it says: 'Press Enter Query or select button to clear search.'

To determine the current active record, check the change indicator in the Change Indicator Field. A blank in the Change Indicator Field indicates the current active record for that person. An "I" indicates that the ID in this row has been changed; this row shows the old ID. A "N" indicates that the name in this row has been changed; This row shows the old name.

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Type
Z	Smith	S	E	22	N	
S	Smith	S	E	05	I	LGCY
Z	Smith	S	E	05		