How to Search in Banner

Please note: This document assumes that you already understand the basics of how to login and use Banner.

In Banner, we enter the general information about each person/student/entity only one time.

For example, if a Graduate Center student is also an employee, the Registrar and Human Resources offices do not create a separate record for this employee/student, for each office’s use. Generally speaking, we share the general information on the person/student/entity (name, SSN, DOB), but each has a separate section within that record where their data is stored.

Ways to Search

a) Search by Name/Banner id in SOAIDEN/FOIIDEN/ROAIDEN/PPAIDEN.
b) Perform a Name search using WILDCARDS, with 3 different combinations.
c) Search by SSN on GUIALTI using the SSN that you have.
d) Search by Telephone, E-mail and Additional ID in GUISRCH.

a) Search by Name/Banner ID

1. Click in the Go To box (top left), (Fig. 1) and type the name of the form you wish to use, then press Enter.

![Fig. 1. Go To box](image)

2. Click on the ID drop-down button on the parent form to access the form SOAIDEN/FOIIDEN/ROAIDEN/PPAIDEN (Fig. 2).

![Fig. 2. ID drop-down button](image)

3. Select Person Search (Fig. 3a) OR if searching for vendors, select Non-Person Search (Fig. 3b).
4. You can query using Last Name, First Name and/or Banner ID as shown in the figure below (Fig. 4).

5. Once in the form, make sure the cursor is in the right field. You can accomplish this by either clicking in the required field or pressing the tab key.

6. Enter the Last name (and First name or Banner id) if known or see below for instructions on how to perform searches when the exact spelling is not known (wildcard searches).

7. To execute the query, either press the F8 key or select **Query->Execute** from the menu bar.

   The result of your search will appear on the screen. If more than one name appears, make sure the cursor is in the ID number field of the individual you wish to select. You can accomplish this by either clicking in the ID number field or using the down arrow key on your keyboard to move the cursor to the appropriate record.

   **Note:** If no names appear, check the bottom of the screen (the status line) for any error messages. The message "**Query caused no records to be retrieved**" will appear if there are no matches to the name you entered.
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8. Click on the Select button on the toolbar.

You should now be returned to the form you were originally in when you clicked on the ID drop-down button, and the name and ID number of the student you selected should appear in the top key block.

b) Perform a Name Search Using "Wildcards"

What is a "wildcard" name search? You may not know exactly how a name has been spelled in Banner. You may use "wildcards" by entering part of a name and then using the "%" symbol as a substitute for letters.

You may conduct a "wildcard" name search in at least 3 different combinations, as shown in the following examples:

**Example #1**

Using the combinations, below, will result in a successful search for a student with the last name of McMahn. We don't know if this name was entered as:

"Mc Mahnon" or "Mc-Mahnon" or "Mcmahnon" or "Mc mahnon" or "Mc-mahnon"

We have to use wildcards % to perform effective searches:

- Typing "Mc%" allows us to search for records with a last name starting with "Mc"
- Typing "%Mahnon" allows us to search for last names ending with "Mahnon"
- Typing "%Mahn%" allows us to search for last names that have the string of letters "Mahn" somewhere in the middle of the name.
- Typing "M%ahnon" will be the most effective in this case, since it avoids the variations mentioned above.

**Example #2**

We need to find a record for Smith-Campbell, Charmaine, but we do not know exactly how her original record was entered. We could search with "Smith%" but this may result in thousands of "Smith" records since it is a common name.

To narrow down our search, we can add the full first name or just the first few letters of her first name to our search, as shown in this example:

**Person Search in SOAIDEN:**

<table>
<thead>
<tr>
<th>ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Birthdate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith%</td>
<td>Ch%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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Sample results from Person Search:

<table>
<thead>
<tr>
<th>ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Birthdate</th>
</tr>
</thead>
<tbody>
<tr>
<td>000008740</td>
<td>Smith</td>
<td>Christine</td>
<td>M</td>
<td>06-MAR</td>
</tr>
<tr>
<td>000017038</td>
<td>Smith</td>
<td>Christopher</td>
<td>J</td>
<td>18-DEC</td>
</tr>
<tr>
<td>000008932</td>
<td>Smith</td>
<td>Chrystal</td>
<td>A S</td>
<td>26-OCT</td>
</tr>
<tr>
<td>000007163</td>
<td>Smith-Campbell</td>
<td>Charmaine</td>
<td>J</td>
<td>06-JAN</td>
</tr>
</tbody>
</table>

From here we can easily select the correct record. However, if the results are very similar, we can use the Middle Initial and Birth date as identifiers.

Example #3

Using all the combinations below will result in a successful search for a student with the last name "Kelly" (keep in mind that the use of wildcards may result in several other names matching the search condition as well).

<table>
<thead>
<tr>
<th>To find a name that...</th>
<th>You enter...</th>
</tr>
</thead>
<tbody>
<tr>
<td>begins with a specific character string</td>
<td>Kel%</td>
</tr>
<tr>
<td>contains a specific character string (in the middle of the name)</td>
<td>%ell%</td>
</tr>
<tr>
<td>ends with a specific character string</td>
<td>%llly</td>
</tr>
</tbody>
</table>

Procedures for Conducting Wild Card Searches

You should conduct a wildcard search on first and/or last names by following the procedures below:

- Be sure the cursor is in the appropriate name field by either clicking in the field or depressing the key to move the cursor.

- Enter the name and wildcard(s) following the examples above.

- To execute the query either press the F8 key or Select Query->Execute from the menu bar.

- The result of your search will appear on the screen. If more than one name appears, make sure the cursor is in the ID number field of the individual you wish to select. You can accomplish this by either clicking in the ID number field or using the down arrow key on your keyboard to move the cursor to the appropriate record.

  Note: If no names appear check the bottom of the screen (the status line) for any error messages. The message "Query caused no records to be retrieved" will appear if there were no matches to the query you entered.

- If you find a match, click on the Select button on the toolbar.

- Repeat this process 3 times, using 3 different wildcard search combinations, or until you find a match.
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• You should now be returned to the form you were originally in when you clicked on the ID button and the name and ID number of the student you selected should appear in the top key block.

c) Search by SSN in GUIALT

1. From the form, click on the Search button as shown below (Fig. 4):

   ![Search button](image)

   Fig. 5. Search button

2. This will give you an option to search on Alternate Id. Select that option.

   This will bring you to the GUIALT screen (Fig. 5).

   ![GUIALT screen](image)

   Fig.6. GUIALT screen

3. Enter a full social security number in the GUIALT form.

4. Press the F8 key on your keyboard OR - select Query->Execute from the menu bar.

5. If the search was successful, go to step 6.
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- If the search was unsuccessful, you will see the following message at the bottom of the screen: "Query caused no records to be retrieved. Reenter." You should double-check to ensure that you entered the correct social security number.

- If this is unsuccessful, then you should continue the person search using the Searching by Name instructions.

6. Place the cursor in the right SSN / TIN field (you can use the up or down arrows on your keyboard), and then click the Select button on the toolbar.

This should return you to the form you were originally working in.

Note: When you return to the original form, the ID number you selected will appear in the ID number field but the corresponding name will not appear until you perform a "next block" function or press the key.

d) Search by Telephone, E-mail and Additional ID in GUISRCH

Banner has been enhanced to enable searching by using an e-mail address, telephone number, or the additional ID. This functionality is available on the form, General Search (GUISRCH).

1. Type in GUISRCH in the Go To box and press Enter.
2. Click into one of the fields (e.g. e-mail or telephone).

***FOR BUSINESS OFFICE STAFF ONLY***

Search by Name in FTMVEND

1. In FTMVEND, click on the vendor. This takes you to the entity name/ID Search Form (FTIIDEN).
2. Select Query -> Cancel from the menu bar.
3. Click on the Rollback button on the toolbar.
4. Uncheck all of the vendors and add a checkmark to "All".
5. Select Next -> Block.
6. Place the cursor in last name block and enter the last name%. Press the F8 key or select Query -> Execute from the menu bar.
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7. The result of your search will appear on the screen. If more than one name appears make sure the cursor is in the ID number field of the individual you wish to select. If you don’t know which identical name to choose go to step 8.

Note: If no names appear check the bottom of the screen (the status line) for any error messages. The message “Query caused no records to be retrieved” will appear if there were no matches to the name you entered.

8. You can search by the Social Security number in FOAPERS. Enter the ID and select Next -> Block from the menu. If the individual in Banner is a student, his/her actual birth date, age and social security number will be shown.

9. If this search is unsuccessful, then you should continue the person/vendor search using the Searching by Name instructions.

10. If the name of the entity is found, check to see if the entity is set up as a vendor. You can do so by viewing the value of Column V. If the value is = “Y” as shown below (Fig. 8), then the entity is setup as a vendor.

11. If name is found but not set up as a vendor, go to the Identification Form, FOAIDEN, to setup the person or entity as a vendor. For more information on setting up an entity or person as a vendor, please view the following documentation: How to: Perform Common Matching within Internet Native Banner (INB)

12. If the name is not found, follow the steps provided the following documentation: How to: Perform Common Matching within Internet Native Banner (INB)