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There are several methods to search for a person or company in Banner. This Search Procedure Manual will cover each of these in detail.

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ID and Name Fields in Key Block

There are four methods to search for a person or company in Banner using the ID and Name fields located in the Key Block of a form.

If you are entering a new record, into any Banner systems such as the Student, Finance, Financial Aid, Human Resources, or Advancement systems, you must use all four methods below to search for the person before entering the new record.

If, after an exhaustive search using the four methods below, the person or company is not found, it is now evident that they do not exist in the Banner system and, if appropriate, can now be added.

Method 1 - Search by Eight Digit ID

1) Enter the entire 8-digit ID into the ID field and press the Enter key on your keyboard.
   a) If there is a match on the ID, the name will appear in the name field and you have completed your search.
   b) If no match was found, the message “ERROR ID is invalid” will appear in the Status Line.

Method 2 - Search by Full Name

1) Make sure the ID field is blank. Press the Tab key on your keyboard to move the cursor to the Name field.
2) 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).
   a) If one match is found the name and ID are returned to the form.
   b) If more than one match is found, the ID and Name Extended Search window appears (more information on the Extended Search is found on page 4 of this document).
   c) If no match was found, the message “ERROR ID is invalid” will appear in the Status Line.

Method 3 - Search by Partial ID

1) Enter a partial 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.
Example 1: 310% - returns all ID numbers that start with 310.
Example 2: 310%880 – returns all ID numbers that start with 310 and end with 880
3) If there is one match on the partial ID, the name and full ID are returned to the form and you have completed your search.
4) If more than one match is found, the ID and Name Extended Search window appears (more information on the Extended Search is found on page 4 of this document).
5) If no match was found, the message “ERROR ID is invalid” will appear in the Status Line.

Method 4 - Search by Partial Name
1) Make sure the ID field is blank. Press the Tab key on your keyboard to move the cursor to the Name field.
2) 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).
Example 1: smith, j% - returns all ID’s with last name “Smith”, and the first name starting with “J”
Example 2: mag%, p% - returns all ID’s with last name starting with “Mag”, and the first name starting with “P”
Example 3: %, barbara – returns all ID’s with any last name, and the first name “Barbara”
Example 4: %dell% - returns all ID’s with “dell” anywhere in the last name
3) If one match is found the ID and name are returned to the form and you have completed your search.
4) If more than one match is found, the ID and Name Extended Search window appears (more information on the Extended Search is found on page 4 of this document).
5) If no match was found, the message “ERROR ID is invalid” will appear in the Status Line.
ID and Name Extended Search Window

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:

1) Click on the drop-down arrow next to Search Results.
2) Use the scroll-bar to scroll to the desired name.
3) 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.
4) 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 ID and Name 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. To narrow down the search results:

1) If desired, click on the radio button next to Person or Non-Person (use Non-Person to search for companies containing the search criteria).
2) Enter additional search criteria in any of the Reduce Search by fields (City, State, Zip, Date of Birth and/or Gender).
3) Click on the Search icon and the updated number of search results will be displayed.
4) Click on the drop-down arrow next to Search Results.
5) Use the scroll-bar to scroll to the desired name.
6) 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.
7) 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:

a) Perform an Enter Query function (click on Query/Enter in the Menu or click on the Execute Query icon), the Extended Search Alert box will appear.
b) Click on **Extend your current query**.

c) Enter the additional search criteria on the search form, using the percent (%) sign as a wildcard where necessary. The original search criterion is displayed at the bottom of the form.

2) Perform an Execute Query function (click on Query/Execute in the Menu, Press F8 on your keyboard or click on the Enter Query icon). The updated search results will be displayed.

3) When you have located the person, double-click the ID number to return the Name and ID to the form.

**Alternate ID Search Form (GUIALTI)**

The **Alternate ID Search** form (GUIALTI) is used to search for a person by Social Security Number, 8-digit ID Number, Name and/or Date of Birth or a company by 8-digit ID Number or Name, shown below.

To use the Alternate ID Search form:

1) Access the Alternate ID Search from the Banner Main Menu using one of the following methods:

   a) Type GUIALTI in the Go field and hit Enter.

   b) Double-click the form name from your My Banner menu.

   c) From any form with ID/Name fields in the Key Block, click on the Search icon next to the ID/Name fields.

   d) Then click on Alternate ID Search.

2) Enter your search criteria, using the percent (%) sign as a wildcard where necessary.
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3) Perform an Execute Query function (click on Query/Execute in the Menu, Press F8 on your keyboard or click on the Enter Query icon). The search results will be displayed.
   a) If you accessed the Alternate ID Search form from a form with ID/Name fields, double-click the ID number to return the Name and ID to the form.
   b) If you accessed the Alternate ID Search form directly, you will need to copy the ID number by clicking on Edit/Copy in the Menu Bar, and then paste it in the ID field of the desired form by clicking on Edit/Paste in the Menu Bar.

4) If you cannot locate the person or company you are looking for, perform an Enter Query function (click on Query/Enter in the Menu or click on the Execute Query icon) to clear the existing query and start a new one or use an alternate search method, shown below.

Person Search Form (SOAIDEN)
The Person Search form (SOAIDEN), shown below, is used to search for a person by 8-digit ID Number, Name and/or Date of Birth.

To use the Person Search form:
1) Access the Person Search from the Banner Main Menu using one of the following methods:
   a) Type SOAIDEN in the Go To field and hit Enter.
   b) Double-click the form name from your My Banner menu.
   c) From any form with ID/Name fields in the Key Block, click on the Search icon next to the ID/Name fields.
   d) Then click on Person Search.
2) Enter your search criteria, using the percent (%) sign as a wildcard where necessary.
   a) Perform an Execute Query function (click on Query/Execute in the Menu, Press F8 on your keyboard or click on the Enter Query icon). The search results will be displayed.
   b) If you accessed the Person Search form from a form with ID/Name fields, double-click the ID number to return the Name and ID to the form.
c) If you accessed the Person Search form directly, you will need to copy the ID number by clicking on Edit/Copy in the Menu Bar, and then paste it in the ID field of the desired form by clicking on Edit/Paste in the Menu Bar.

d) If you cannot locate the person you are looking for, perform an Enter Query function (click on Query/Enter in the Menu or click on the Execute Query icon) to clear the existing query and start a new one or use an alternate search method.

Non-Person Search Form (SOACOMP)
The Non-Person Search form (SOACOMP), shown below, is used to search for a company by 8-digit ID Number or Name.

To use the Non-Person Search form:

1) Access the Non-Person Search from the Banner Main Menu using one of the following methods:
   a) Type SOACOMP in the Go to field and hit Enter.
   b) Double-click the form name from your My Banner menu.
   c) From any form with ID/Name fields in the Key Block, click on the Search icon next to the ID/Name fields.
   d) Then click on Non-Person Search.

2) Enter your search criteria, using the percent (%) sign as a wildcard where necessary.

3) Perform an Execute Query function (click on Query/Execute in the Menu, Press F8 on your keyboard or click on the Enter Query icon). The search results will be displayed.
   a) If you accessed the Non-Person ID Search form from a form with ID/Name fields, double-click the ID number to return the Name and ID to the form.
   b) If you accessed the Non-Person ID Search form directly, you will need to copy the ID number by clicking on Edit/Copy in the Menu Bar, and then paste it in the ID field of the desired form by clicking on Edit/Paste in the Menu Bar.

4) If you cannot locate the company you are looking for, perform an Enter Query function (click on Query/Enter in the Menu or click on the Execute Query icon) to clear the existing query and start a new one or use an alternate search method.