College of William and Mary

Searching in Banner

A Reference and Training Guide

Banner Support
2/19/2009
Objectives

- Review tools and searching techniques
- Review Duplicate Policy
Did you know?

- Over 140 users across campus can create/update person and/or vendor records
- 540,000+ persons in our database
- 15,000+ corporate/vendor records

Procedure Overview

1. Search, search and search AGAIN!
2. Create record if one does not exist.
3. Enter address and telephone number.
4. Enter biographical data.
5. Enter non-WM email(s), as appropriate.

Why Search?

- To avoid making a duplicate record
  - Duplicates are BAD
  - Duplicates cause PROBLEMS
- Why are duplicates bad?
  - Multiple leave balances, tax records, student records
- Time spent up front searching saves hours of time in the future for cleanup
- Some duplicates can’t be deleted because of the extensive transactions marked DO NOT USE
Search Tools

- GUIALTI – Alternate ID Search form
- GUASYST – System Identification
- Wildcards - % and _ (underscore)
  - Sm%th, J%
  - %slicer%, e%
  - O_connel%
- Name
- SSN/TIN, Date of Birth and Middle Initial

Wildcards

- Percent (%) and underscore (_) signs
- Percent sign can be used at the beginning, middle, and end of a word and can represent any character or a set of characters.

EXAMPLES:

(1) Sm%th, J% - finds any last name beginning with ‘sm’ and ending with ‘th’ and whose first name begins with ‘J’.

(2) %slicer%, e% - finds any last name containing ‘slicer’ and who first name begins with ‘E’.

- The Underscore sign represents one character but can be used multiple times.

EXAMPLES:

(1) Sm_th, J% - where _ is one letter.

NOTE: Use a wildcard (%) in place of an international character (ñ, é, ò) when searching. Even though the database allows these characters in the name, the name may not always be created using the characters.
Quick Search

NOTE: Some users have access to enter or view SSN – can use this feature to quickly access a record.

1. Open the XXXIDEN form.
2. Enter the SSN/SIN/TIN in the ID field.
3. Press Enter.
4. If no match is found, the field remains blank. Check the Auto Hint Line at the bottom of the form. It should say, “Query caused no records to be retrieved. Re-enter.”
5. If a match is found, the name will be displayed in the Name field.

NOTE: If more than one match is found, this is TROUBLE.

6. Verify this is the right person.
7. Also conduct a name search to ensure there is NOT another record for the person that doesn’t have a SSN.

Name Standards

- Name must be the legal name as it appears on tax identification or international legal document.
- Use mixed (upper/lower) case format.
- Hyphens, apostrophes, and international characters may be used.
- Do not use periods, commas, or pound signs (#).
- Use spaces in the name as indicated by the person.
- Non-hyphenated last names should be entered as either a middle name and last name or both names in the last name field. Ask the person.
Searching for People

1. In the XXXIDEN form, click the Search icon to the right of the ID field in the key block.

2. Select the Alternate ID Search (GUIALTI).

3. Search first by Name using wildcards.
   a. Type a wildcard (%) at the beginning and end of the partial name, in order to increase the likelihood of finding a match.
   b. This search can be case sensitive if you click the Case Sensitive Query radio button at the bottom of the screen.

4. Perform an **Execute Query (F8)** command to begin the search.

**NOTE:** Check the Auto Hint line at the bottom of the form if you get no results to make sure you have entered everything correctly.
5. Review the results and verify with Date of Birth and/or SSN/TIN.

6. To start a new query, click the Cancel Query icon once to cancel the query and then click the Enter Query icon to enter a new query.

7. If no records were found during your search, you must search again.
   a. Enter % for a few key letters that are easily misspelled or has many variants (i.e., %m%y%er% for Myers, Meyers, Myer, Meyer, Mayer).
   b. Consider nicknames and/or legal names.
   c. Enter partial last name using % and SSN and/or date of birth (i.e., SSN= %2386%; last name=%anders%n%).

8. Perform an Execute Query (F8) command to begin the search.

<table>
<thead>
<tr>
<th>Hints and Examples</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter M%c%Don% to search for McDonald or Mac Donald</td>
<td></td>
</tr>
<tr>
<td>Enter O%Con% to search for O’Connell or O Conell or Oconnell</td>
<td></td>
</tr>
<tr>
<td>Use a first initial followed by % to narrow the search</td>
<td></td>
</tr>
</tbody>
</table>
9. If you are able to identify the correct person, highlight the record and double-click to return the results to the XXXIDEN screen.

10. If you do not find a matching record, click the Exit icon to exit GUIALTl screen and return to the XXXIDEN.
11. Verify this is the person by reviewing:

- Double-check the full name. Check for any maiden names. Do they match?
- Is there a Suffix on the name?
- Double-check the address given with any address in the system.
- Open GUASYST form to see what roles the current person may have. From XXXIDEN, select Options>System Data Summary [GUASYST].
Search Names with Other Data

1. Enter partial last name using % and SSN and/or DOB.
   
   a. SSN = %2386%; Last Name = %anders%n%
   
   b. Remember many records do not have SSN, DOB or Middle Name.

2. Check GUASYST.

3. Validate with SSN, DOB and Middle Name.
Searching for Non-Person

You can search for non-person entities; i.e., vendors, using both the Alternate ID Search or the ID and Name Extended Search following the steps listed above.

- On GUIALTi enter a C in the Entity column to retrieve only corporations. (P = person)

- Companies may do business under different name. In Banner the notation used is “DBA”- Doing Business As.

- Search using partial names - %colonial% to search for any company that has ‘colonial’ in the title.

- Search using abbreviations – Fed%Ex% for Federal Express; U%P%S% for UPS
ID and Name Extended Search

1. From the ID field in the Key Block, tab to the Name field.

2. Enter Last Name, a comma, and then the First Name.

3. Press the Enter or Tab key to execute the query.

<table>
<thead>
<tr>
<th>Possible Search Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Match</td>
</tr>
<tr>
<td>Single Match</td>
</tr>
<tr>
<td>Multiple Matches</td>
</tr>
<tr>
<td>The Auto Hint line will display the following: <em>ERROR</em> Name is Invalid.</td>
</tr>
<tr>
<td>The ID number will appear in the ID field.</td>
</tr>
<tr>
<td>The ID and Name Extended Search form will appear.</td>
</tr>
</tbody>
</table>

4. If no match is found, try using wildcards (%) or _) to search on partial names.

5. Press ENTER or TAB to execute the query.

6. To refine the search results use the Reduce Search By keys: person or non-person; City, State, Zip, Name Type, SSN/SIN/TIN, Birth Date or Gender.
What Do I Do If?

1. I’m seeing double:
   - Different 930 numbers?
   - Is there an “N” in the change indicator column?
   - Do they have the same SSN?
   - Check Date of Birth, address, email, test scores – identify what is the same.
   - Report to Banner at banner@wm.edu with “Duplicate” in the Subject Line. Include the 930 numbers.

2. I search with SSN and find a match …..
   - Review information at hand – SSN, Date of Birth, address, email, test scores
   - Conduct subsequent searches using only name to find any other “possible” matches
   - Report any additional matches if the same person
   - Make the best choice with the information you have

Did You?

- Run multiple searches?
- Confirm that no one else exists with the same name and date of birth or SSN?
- Report any duplicates?
- Seek advice if not sure?
- Attach information to the existing record?
Duplicate Corrective Policy

- 1\textsuperscript{st} Offense
  o Determine the circumstances
  o Provide counseling to user and supervisor (training)

- 2\textsuperscript{nd} Offense
  o Communicate with the user, supervisor, EIS Director and data owner
  o Attend mandatory training

- Subsequent Offenses
  o Consult with EIS Director and data owners to recommend suspension of INB create/update access to XXXIDEN and/or access to electronic processes that load applicants.