How do I search for records in Banner?

OTHER TIPS (Continued)

• There can be many variations in spelling for names that sound the same and many nicknames. See the data standards document for a larger list.
  Adams vs. Addams
  Schaefer vs. Schafer vs. Shafer
  Clark or Fry vs. Clarke or Frye
  Fisher vs. Fischer
  Anderson vs. Andersen
  Hellman vs. Hellmann
  Kramer vs. Cramer vs. Cremer
  Maher vs. Mayer
  Meyers vs. Meiers vs. Myers
  Moore vs. More
  Phillips vs. Philips vs. Phillipps
  Kroger vs. Kroeger
  Gardner vs. Gardener vs. Gardiner
  Burkhardt vs. Burkhard vs Burkart
  Kelly vs. Kelley
  John vs. Jon
  Stephen vs. Steven
  Geoffrey vs. Jeffrey vs. Jeffery
  Ann or Carol vs. Anne or Carole
  Marge vs. Marj
  Chris vs. Kris
  Catherine vs. Kathryn
  Michele vs. Michelle
  Mary Ann vs. Maryann
  Elizabeth vs. Elisabeth
  Dotty vs. Dottie
  Marcia vs. Marsha
  Gale vs. Gayle vs. Gail

COMPANY NAME
To search for companies or other organizations, use the same tips mentioned for person names. Make liberal use of the wildcard when searching and think about possible abbreviations that may have been used.

Use the % in front of, in between, and/or after unique words in the company name. See the data standards document for standards regarding the use of abbreviations for words like Co. and Inc.

WHAT IS THE PROBLEM WITH DUPLICATE RECORDS?
Duplicate records can cause problems with many systems because all of the data for one person can be split between 2 or more records. This means that any system could experience a loss of data if they are using one record and other departments are using a different record.

It could affect many processes including payroll, financial aid, class registration, residence housing, reimbursements, bursar bills, library activity, network and blackboard access, and portal accounts, among others. Notify your data custodian if you suspect there is a duplicate record.

BANNER OR XU (LEGACY) ID
If you know the Banner ID number or the old XU ID number, these can be searched directly in Banner. Type the Banner ID number with all leading zeroes into the ID field in any Banner form. To search by XU ID, type the ID number preceded by the letters XID into the ID field in any Banner form.

Duplicate records cause all of us the ‘run-around’. Contact your data custodian if you suspect that there is a duplicate record.

IF YOU NEED FURTHER ASSISTANCE, CONTACT YOUR DATA CUSTODIAN.
See the data standards document for contact info. It is on the portal under the employee services tab.
Searching in Banner and avoiding the creation of duplicate records.
Start with what you know!

SOCIAL SECURITY NUMBER

Even though we no longer use the social security number as a person’s ID in Banner, it is still a field that can be searched when you are looking for a particular person.

To search by the SSN, you must go to the Banner form, GUIALTI. (In the HR system, you may search by SSN on the PPAIDEN form.) There are several ways to get to GUIALTI. You may go to the main Banner screen and type the form name, GUIALTI, in the ‘GO’ box. Or, you can get there from any form in Banner by going to File, then Direct Access, on the menu bar, and typing GUIALTI in the box that appears.

When this form appears, type the person’s SSN without the hyphens in the first column, then press the F8 key. You will see two records for most people; one with the Banner ID, and one with the old XU (or Legacy) ID appearing in the second column. You will then have to copy the Banner ID number and paste it into the ID field in the appropriate Banner form to pull this record into the form.

PERSON NAME

On most of the Banner forms, you will see a magnifying glass icon at the end of the name field. Click on this icon to bring up a search form that will allow you to search by the person’s name. Depending on your access, this form may be SOAIDEN, AOAIDEN, or FOAIDEN. Type the last name in the last name field and the first name in the first name field, then press F8.

Use the birthdate field to verify whether this is the correct person or not. (A brand new undergrad student is probably not 50 years old, nor is a parent of an undergrad usually 23 years old.) If the birthdate is missing or is inconclusive, check the address or other data to see if this could be the correct record by going to Options, then Search and Display more Detail on the menu bar. (Remember that parents and children could have the same name and address.)

If you find a record that you think is correct, double-click on the line to bring the record into the form. Check GUASYST to see where this record exists in the Banner system before assuming you are correct.

If you don’t find the record you are looking for, try a more general search by using the % as a wildcard. Names can be spelled many ways; some people may go by their middle name, or they may have both first and middle name in one field, hyphenated or not.

SEARCHING SPECIFIC TO GENERAL

• To perform a specific search, enter the entire last name, first name.
• To perform a more general search, enter the entire last name, a comma and a first initial followed by a %, or no initial, just a %.
• To perform a very general search, enter part of the last name with a % and either the first name, first initial or partial first name with a %, or no first name, just a %.

Only after you have searched exhaustively may you create a new record. See “What is the Problem with Duplicate Records?” on the back side of this brochure for a discussion on duplicate records.

OTHER TIPS

Remember that Banner is very literal. If you are doing a specific search, the name(s) in the query must match the name(s) on the record exactly.

• A name on a record may or may not have an apostrophe or hyphen in it. Search by O’donnell to get both Odonnell and O’Donnell, or %brown% or %mackie to get Brown-Mackie.
• A record may or may not have a space in the middle of the name. Search by van%Crotty to get both van Crotty and VanCrotty, or %%lehman to get Vonlehman or Von Lehman or Vanlehman.
• Think of variations in spelling such as van vs. von, Mc vs. Mac, St. vs St vs. Saint, le vs. la vs. l’, de vs. da vs dah vs d’, etc.