

BLISS -210

Workshop 1 – Person Search



Overview:

This set of activities will provide you with practice in how to use the various forms in Banner to identify if a person record already exists in Banner.




REMEMBER that all effort should be made to determine that a person does not currently exist in Banner before creating a new person record.

Special Instructions:

You should be able to log into Banner, If you do not remember how this is done, refer to the 'Logging onto Banner' Job Aid.

Remember that this process is available from any Banner form where there is an ID/Name in the key block. This workshop activity uses SPAIDEN as an example.

ACTIVITY 1 – Searching from an ID/Name field in any Banner form:

Step	Action	Results
1.	<p>You should be on the General Menu form of Banner (GUAGMNU). Go to the 'SPAIDEN – General Person Identification' form</p> <p>Remember that you can use the 'GO TO' field, find the form in the Menus, or use the Object Search by clicking on the LOV  icon.</p>	Banner displays the SPAIDEN form and the cursor is in the ID field of the Key Block.
2.	<p>Click on the LOV  Icon in between the ID and Name fields and then select the Person Search in the Option List. You may also use the HELP/List Dropdown menu or the F9 key.</p>	Banner displays the SOAIDEN – Person Search form. Note the AutoHint message: "Enter a query, press F8 to execute, Ctrl+Q to cancel".
3.	<p>Move the the 'Last Name' field. You can use either the 'Tab' key or left-click in the field.</p>	The cursor moves to the Last Name Field.
4.	<p>In the Last Name field enter "JONES", and execute the query using either F8 key, the Execute query icon , or the QUERY/Execute dropdown menu function.</p>	Banner displays all names that are exactly JONES. Note that because the Radio Button at the bottom of the form was set to "Case Insensitive Query", you would get the same results if you used 'JONES', 'jones' or 'Jones' as your query value.
5.	<p>Use the Scroll bar on the right side of the form or the 'Page Down' key or the 'Record/Scroll Down' dropdown option to page through the names.</p>	<p>Banner will display the additional pages of names.</p> <p>Note that for many of the names there are two entries. The 'Change Indicator' and 'Type' fields tell you if the record is present because of a N – Name or I – Id change, and the type of name, if any, associated with the record (e.g. Maiden).</p>

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ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Type
003000797	Jones	Anne	Mary	26-JAN-1962		
M00019506	Jones	Anne	Mary	26-JAN-1962	I	
006922381	Jones	Anthony		25-APR-1965		
M00013775	Jones	Anthony		25-APR-1965	I	
001015121	Jones	Ashley	A	26-JAN-1983		
001895166	Jones	Ashley	A	23-JUL-1970		
M00026158	Jones	Ashley	A	26-JAN-1983	I	
M00056319	Jones	Ashley	A	23-JUL-1970	I	
001048944	Jones	Audrey	L	06-FEB-1986		
M00021805	Jones	Audrey	L	06-FEB-1986	I	
002880054	Jones	Barbara	J			
M00049851	Jones	Barbara	J		I	

Change Indicator
 I = ID change
 N = Name Change

Name Types
 AKA
 LEGL - Legal
 LGCY - Legacy
 PREF - Preferred

Step	Action	Results
6.	Place your cursor on one of the records in the form and select the record. You can use the select icon  , the Shift+F3 keys, the File/Select option from the dropdown menu, or double click on the ID field for the record you want.	Banner returns to the SPAIDEN form with your selected person in the Key Block. Note if you selected a row where the value in the 'Change Indicator' field was an "I" or "N". a message will appear in the Auto Hints Block: "*Warning* Previous ID/Name replaced with current ID/Name" . The values in the ID and Name field will be the current values for that person.


Activity 2 – Searching on Multiple fields and Re-querying:

Step	Action	Results
1.	You should be in the SPAIDEN form. If not exit the form you are on and navigate to SPAIDEN.	Banner Displays the SPAIDEN form.
2.	Click on the LOV  Icon in between the ID and Name fields and then select the Person Search in the Option List. You may also use the HELP/List Dropdown menu or the F9 key.	Banner displays the SOAIDEN – Person Search form.
3.	Tab to the Last Name field, enter: 'jones', tab to the First name field, enter: 'mic', Execute the query.	Banner places the cursor in the ID field. Note the Auto Hint message: "FRM-40301: Query caused no records to be retrieved, re-enter". No one currently in the system exactly matches the name JONES, MIC. Because no wild card characters were entered as part of the search criteria, the system looked for the exact characters that were entered.

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Step	Action	Results
4.	Perform the 'Enter Query' function using the Enter Query Icon  , the F7 key, or the Query/Enter dropdown menu option.	Banner places you in Enter query mode.
5.	Tab to the First Name field and add the percent symbol '%' to the end of 'mic'. The First Name value should now look like: "mic%". Execute the query.	Banner returns 6 records for three different people that have the last name of "Jones" and a first name that begin with the characters "mic".

Activity 3 – Complex searches:

Now we are going to do a more complex search on name. One of the limitations of the Name Search functions in Banner is that if the entry of names varies, then searching can require more 'creative' criteria. For example, we want see if there is a: 'Kathy Mc Donald' in Banner. But we are not sure if how the name may have been entered in Banner. It could have been any of the following (and probably a few other versions as well):

Macdonald, or MacDonald, or Mac Donald, or McDonald, or Mc Donald

And the first name might be:

Kathy, or, Kathleen, or Katherine, or Kathryn

Step	Action	Results
1.	If you are not already there, Sign on to Banner and Navigate to the SPAIDEN form, and do a list function from the key block to bring up the SOAIDEN form.	Banner displays the SOAIDEN form in Query Mode.
2.	Enter 'macd%' in the Last name field, and Execute the query.	Banner displays all the names that start 'macd' Note that 'Mac D' is not included in the search results because the space is significant in the search.
3.	Perform an Enter Query Function, tab to the Last name field, enter 'mac d%' (mac a space, d, and %), and execute the query.	Only names that begin with 'Mac D' are displayed. Neither search shows names starting with Mc.
4.	Perform an Enter Query Function, Table to the Last name field. Can you construct a query using the Percent symbol(s) to return all the variations? If you get stuck, the solution is on the next page.	

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Step	Action	Results
5.	Did you find a solution? Here is one option: Last name: m%c%don% First Name: ka%	The variations of the name are displayed.

Activity 4 – Using Extended Search for ID and Name:

Banner has a second method of performing a search for ID/Name available from the Name field in the key block of any form. The Extended search is triggered when in the key block:

The ID field is blank

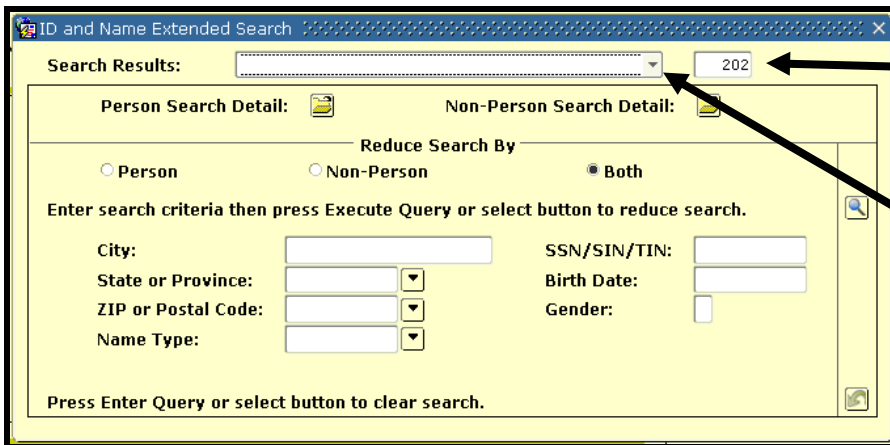
The Name field contains:

part of a last name,

last name , comma, portion of first name followed by %,

and more than one possible match exists in Banner

Step	Action	Results
1.	Return to the SPAIDEN form. If an ID is in the key block field delete it (Clear Field functions are CTRL+U, or Item/Clear Dropdown menu option, or delete the characters from the field).	The Id field should be empty.
2.	Tab to the Name field and enter "davis" and press the tab key.	Banner will display the Extended Id/Name Search Dialog box.



The number of current matches are 202.





The matching records can be viewed using the dropdown arrow.

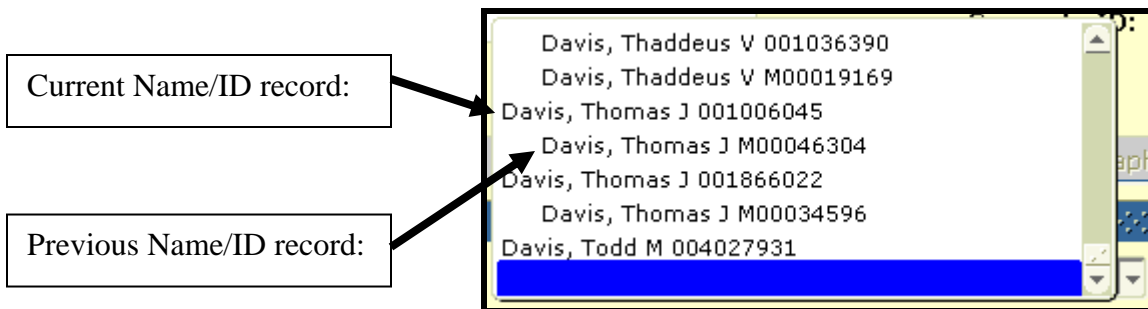
You can refine the search results by entering additional data in the lower part of the dialog box.

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Step	Action	Results
3.	Enter 'CA' in the State Province field, and click on the 'Reduce Search Icon'  on the right edge of the 'ID and Name Extended Search' dialog box.	The Results number is reduced to 163.
4.	Enter 'San Diego' in the City field, and click on the 'Reduce Search Icon'  on the right edge of the 'ID and Name Extended Search' dialog box.	The Results number is reduced to 90.
5.	Enter 'M' in the Gender field, and click on the 'Reduce Search Icon'  on the right edge of the 'ID and Name Extended Search' dialog box.	The Results number is reduced to 35.
6.	Open the "Search Results" by using the LOV icon  at the end of the field.	The list of matching records are displayed. If a record is indented, it is an alternate ID/Name record for the person.



Step	Action	Results
7.	Select a record by clicking on the line in the 'Search Results' list.	The Current ID and Name are returned to the key block fields of the form.

Activity 5 – Using SOAIDNS for ID/Name Search:

A third method of searching for an existing person record is to go the SOAIDNS – Person Search Detail form.

One difference between using SOAIDNS and the other methods is that you must directly access the SOAIDNS form. It will not 'automatically' be displayed from another form.

Another is the ability to use 'Soudex' or 'Sounds-like' searches on the Last Name (e.g. Sounds like 'mac donald').

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Input Areas

Results Areas

Step	Action	Results
1.	Navigate to the SOAIDNS form using the Direct Access (Go To...), Menus or Object Search.	Banner Displays the SOAIDNS form and you are placed in 'Enter Query' mode.
2.	Tab to the 'Last Name' field and enter 'davis' (note the lower case 'd') and execute the query.	The cursor returns to the ID field and the Auto Hint message: "FRM-40301: Query caused no records to be retrieved, re-enter" is displayed. Note: Search criteria in this form is Case Sensitive.
3.	Tab to the Last Name field and enter 'Davis' (notethe upper case 'D'), execute the query.	Multiple records are displayed (note the scroll bar at the right side of the block). The Data presented in the other blocks all relate to the highlighted record in the Search block.

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
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This Data all belongs to the highlighted record

The screenshot shows a web browser window titled 'Oracle Developer Forms Runtime - Web: Open > SOAIDNS'. The main content is a 'Person Search Detail' form for SOAIDNS 7.3.2 (TEST1). The form is divided into several sections:

- Header Section:** A table with columns: ID, Last Name, First Name, Middle Name, Birth Date, Gender, Change Indicator. The first row (ID: 001968255) is highlighted in blue. Other rows include M00069123 and 003071213.
- Soundex Search:** Fields for 'Sounds like...Last Name' and 'First Name'.
- Address Details:** A table with columns: Type, Street, City, State or Province, ZIP or Postal Code, Telephone, From Date, To Date, Inactive Indicator. It shows two address entries for '5120 S GRAMERCY AVENUE' in 'LOS ANGELES, CA'.
- General Learner:** Fields for Term, Status, Residence, Class, Full or Part Time, Activity Date.
- Registration Terms:** A field for Term.
- Curricula Summary:** Fields for Priority, Term, Program, Catalog, Student Type: Level, Campus, Rate: College, Degree. It also includes Admission Type, Admission Term, and Matriculation Term.
- Field of Study Summary:** Fields for Priority, Term, Type, Field of Study, Department, Attached to Major.

Step	Action	Results
4.	Navigate to the next record using the scroll bar, down-arrow key, or the Record/Next dropdown menu.	As the highlighted record changes so does all the information in the other blocks of the form.
5.	Because this form is 'independent' of other forms to return to another form, the Select option is not enabled. To 'remember' and ID, you need to highlight the ID you wish to work with and then 'copy' it by using the CTRL+C keys or the Edit/Copy option from the dropdown menu. .	There is no confirmation of the copy function.
6.	Exit the form using the exit icon  , the File/Exit dropdown option, or the Ctrl+Q keys.	Banner closes the SOAIDNS form.
7.	Navigate to another banner form, for example SPAIDEN. With the cursor in the ID field of the Key block perform a paste function using CTRL+V keys or the Edit/Paste dropdown menu.	Banner will place the id and associated name in the fields of the key block.

Summary:

You have learned three different methods of searching and selecting a person record in Banner. Which one you use is up to you. Each has a different method of identifying person records and each has different built in functionality/limitations.