Advanced Searching in Banner

One of the most powerful and oft-confusing functions in Banner is searching to determine the existence of a person or non-person (vendor or AR customer). It is critical to avoid creation of duplicate PIDMs in Banner.

In this document we’ll analyze searching, focusing on two searching features:
- Searching for a partial name string
- Using Extended Search

Searching overview

Before proceeding, let’s review searching in Banner.

Forms, where data is entered, updated, and viewed, are at the “heart” of Banner. Before proceeding in a form, basic information (i.e., ID number) denoting the desired record must be entered in that form’s Key Block field(s). If you are unsure of what to enter in the Key Block, you can search for that information.

There are two ways to search in Banner. You can use the Query form or you can search directly from the Key Block.

Searching with the Query Form

1. Go to the desired form in Banner.

2. In the Key Block field, click the Search button. An option list will appear.
3. Select the appropriate search.  
*A query form will appear.*

4. Enter the desired text you wish to search for in the appropriate field(s) of the first (highlighted) row. (See below for “Searching for a partial name string”.)
5. Click the **Execute Query** icon (or press [F8]).

   *The results of your search will appear in the query form.*

6. Click the desired record and then click the **Select** icon.

   *The initial form will redisplay with the appropriate data entered in the form’s Key Block.*

### Searching from the Key Block

1. Go to the desired form in Banner.

2. Press the **[Backspace]** key once.

   *This will clear the ID field of any information.*

3. Press the **[Tab]** key once.

   *The insertion point will appear in the name field.*
4. Enter the name for which you wish to search.

(See “Searching for a partial name string” below for Extended Search.)

5. Press the [Enter] key.
   If there is only one match, the record data will appear in the Key Block fields.

   If there are multiple records that match the entered criteria, the Extended Search window will appear with the count of the number of matching records.

   Clicking the Search Results’ drop-down arrow will display a list of matching records from which you can select a record. If the list is too long, you can use Extended Search to narrow down the list. (See “Using Extended Search” below.)
Searching for a partial name string

Searching for a partial name can be easy if you understand how Banner’s wild card characters work.

There are only two wild card characters used in Banner; the underscore and the percentage sign.

- The underscore character (_) replaces one unknown character.
- The percentage sign (%) replaces any number of unknown characters.

Examples:

Looking for: Last character is “D”
Enter: %d
Possible result: Oxford
           Joanne Woodward
           Ben Casey MD

Looking for: Begins with “ma”
Enter: ma%
Possible result: Maintenance Contract
                MasterCard
                Marshall

Looking for: A 7-character text string where the last character is “N”
Enter: _ _ _ _ _ _n
Possible result: Ruthann
                Deshawn
                Unknown

Looking for: A 7-character text string where the first 2 characters are “RU” and the last character is “N”
Enter: ru_ _ _ _n
Possible result: Ruthann

Looking for: The text “COLLEG” appears anywhere within the field
Enter: %colleg%
Possible result: Cuesta College
                college graduate
                top collegiate honors

Looking for: First letter is “C”, and “LEG” appears anywhere within the field
Enter: c%leg%
Possible result: North Orange College
                chicken legs
Using Extended Search

Banner permits extending (or building upon) an initial search that’s started from the name field in the Key Block.

1. Search using the name field in the Key Block:
   a. Press the [Backspace] key to clear the ID field of the Key Block.
   b. Press [Tab] to position the insertion point in the name field of the Key Block.
   c. Enter a partial name using wildcards and press [Enter].

   If multiple records meet the search criteria, the Extended Search window will open, with a count of the number of records found displayed by the pull down.

   If the list is too long, you can extend the search (which will reduce the number of records found) using the Extended Search window.
2. Enter one or more additional criteria (city, state, zip, birth date, etc.) under **Reduce Search By**, and then click the **Reduce Search** icon.

The extended search should reduce the number of records found. If there is only one match, the Extended Search window will close and the record data will appear in the Key Block fields. If there are multiple records that match the entered criteria, the Extended Search window will appear with the count of the number of matching records.
3. (Optional) If there are multiple records, click the Search Results’ drop-down arrow. A list of matching records will appear.

4. (Optional) Click on the desired record from the list. The Extended Search window will close and the selected record data will appear in the Key Block fields.