

Banner General Person: Introduction and Basic Searching (General Person 101)



v 7.0

Introducing Us

- Your instructor and assistants
- General Person functional and technical support: GP@unm.edu
- Website: <http://gp.unm.edu>
- We are here to help you so please don't hesitate to contact us if you have a question
- Sooner or later everyone makes a mistake – contact us right away when that happens and we can help you fix it. The longer you wait, the worse the impact of the mistake, so contact us right away
- That's why we give you a magnet!

← REMEMBER THIS!

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The General Person Council

- Your instructor and assistants
- General Person functional and technical support: GP@unm.edu
- Website: <http://gp.unm.edu>
- General Person Council
 - Representatives from major GP data entry offices across campus
 - Responsible for defining and enforcing Banner GP data entry standards
 - The group that requires you to pass this class before you can have GP access!

REMEMBER THIS!

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The screenshot shows a web browser window displaying the UNM General Person Council website. The address bar shows gp.unm.edu, which is circled in pink. The page title is "UNM | General Person Council". The main content area includes a "Home" link, a "Banner General Person Council" link, and the email gp@unm.edu. A blue arrow points from the text "GP data entry bible" to the gp@unm.edu link. The "General Person Council" section contains a paragraph describing the council's role. Below this, a blue arrow points from the text "All of today's materials are here" to a list of links under "Training and Reference Materials":

- [GP 101: Introduction and Basic Searching](#)
- [GP 102: Data Entry Standards and Procedures](#)
- [Address Verification Functionality in Banner INB](#)
- [New: General Person SOP 5.1.6.3 - Creating Dummy SSNs \(00 numbers\)](#)
- [DupBusters' Manual](#)

The page number "4" is visible in the bottom right corner.

Introducing You

- Name and office
- Experience with Banner?
- Experience with General Person?
- How did you hear about us (who told you to sign up for this class)?
- How will you be using General Person?
 - Will you be creating new people?
 - Updating existing records?
 - Viewing data only?
- *Your starting form will be SPAIDEN / PPAIDEN*

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Agenda

- GP101: General Person Inquiry
 - Overview of General Person in Banner
 - General Person Tools and Sites
 - General Person Forms and Data
 - How to Search
 - How to Report Duplicates
- Take certification test; if pass, eligible to submit request for GP access

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Class Logistics

- Hands-on course. Feel free to ASK QUESTIONS!
- Pre-requisites: Banner Navigation and Securing Private Data
- Breaks and lunch. Bathrooms and soda machines down the hall; 7-11 and Golden Pride next door
- Please turn off or mute cell phones
- Please sign the sign-in sheet

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GP101 Agenda

- Overview of General Person and Data Access Responsibilities
- General Person Terminology and Sites - How to Get There and Log In
- General Person Forms and Content
- How to Search
- How to Report Duplicates

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What is Banner General Person?

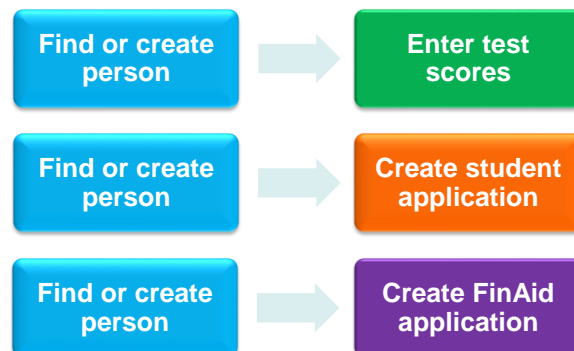
General Person data = all “personal” (demographic) information about a person, including:

- Name (*current and previous*)
- Address (*different types, current and previous*)
- Phone number (*different types, current and previous*)
- Email address (*different types, current and previous*)
- Date of birth
- Deceased date
- Social Security Number (*current and previous*)
- Other ID numbers
- Gender
- Ethnicity
- Citizenship
- Veteran status
- Emergency contact information
- Confidentiality indicator

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The person record is created first

In Banner, before you can enter any information about a person, you must create the General Person record first



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General Person is the heart of Banner

Data entered in General Person is used by all the other modules. GP data is pumped out to billing, W2s, letters, transcripts, etc.

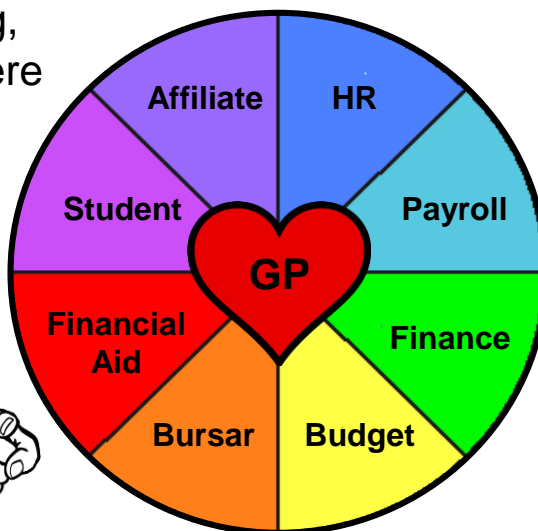
General Person is the beating heart of Banner



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Clean data matters!

- All parts of Banner use this information.
- If the data is wrong, it is wrong everywhere
- It is **critical** to the University that this data be accurate.
- Everyone with GP privs is responsible
- **YOU are responsible for data accuracy.**



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Data access is huge responsibility

- The collection, storage, and use of GP data is governed by federal and state laws and University regulations
 - FERPA (Family Educational Rights and Privacy Act)
 - HIPPA (Health Insurance Portability and Accountability Act)
 - UNM Policies and Procedures Manual (Big Red)
 - Policy 2000, Responsibility and Accountability for University Information and Transactions
 - Policy 2500, Acceptable Computer Use
 - Policy 2510, Computer Use Guidelines
 - Policy 2520, Computer Security Controls and Guidelines
- This is why all persons accessing Banner must take the *Securing Private Data* course
- **YOU are responsible for data security**
- **You WILL be held personally accountable for violations**

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Data Access Responsibilities

Your access to Banner is granted based on **business need** and it is your responsibility to ensure the information you access is used appropriately.

- Do not share, disclose or store your passwords in an unsecured manner.
- You are responsible for any activity that occurs using your password.
- Do not leave your workstation unattended while logged in to administrative information systems.
- Do not use your computer account to engage in any form of illegal software copying or other copyright infringement.
- Do not use your account to harass other computer users.
- Retrieve printed reports quickly and do not leave the reports visible to others.
- **Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.**
- **Secure reports containing confidential and sensitive information.**
- **Shred documents containing confidential or sensitive information in a timely manner.**
- *Do not attempt to access accounts, files, or information belonging to others without their knowledge or consent.*

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Data Access Responsibilities

“Do not attempt to access accounts, files, or information belonging to others without their knowledge or consent.”

- As administrators, we do this all day. How is it OK?
- We only create or update records with people’s knowledge and consent – when someone submits an employment application, request for payment, financial aid request, etc., they are giving us consent to update their record
- You may **only** enter the data that is on the submitted form. You may NEVER add or change information
- Example: You may not fill in gender if they left it blank, even if you know the person

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Handling SSN

- **NEVER** email an SSN. Never.
- Not even just the last 4 digits.
- Instead, refer the person to the Banner ID of the individual and let them look it up. If the administrator you are working with doesn’t have privileges to look up SSN in Banner, you should not be discussing SSN with that person anyway.
- Example: *“The SSN which is currently on John Smith’s 100802264 record should be moved to Jane Doe’s 101730457 record .”*
- Teach this to the people you work with. Remove SSNs from emails they send you and remind them not to send SSNs via email. Use Banner, or have them call you.

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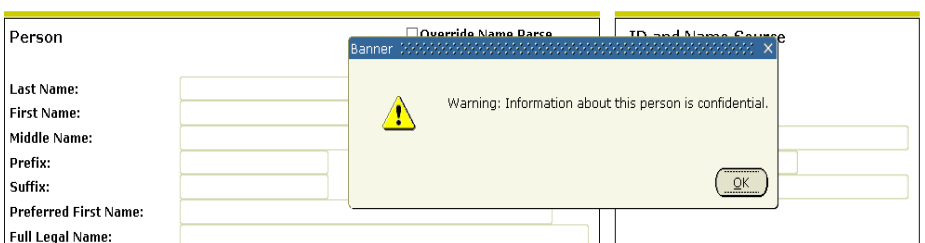
Handling SSN

- **NEVER** store SSNs on your computer. No reports, no scanned documents, no spreadsheets, no SSNs on your machine, EVER. Ever ever ever ever ever ever.
- Be very aware of where you are and who is around you when speaking an SSN out loud.
- Never leave papers with SSNs out in the open on your desk. Store them in locked cabinets or drawers.
- Shred paper containing SSNs as soon as you are finished with them

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“Confidential” Checkbox

- Applies to students only
- **Set by the Registrar’s Office only**, after counseling the student on the impact
- If that box is checked, you will receive a pop-up warning the first time that the student’s record is accessed in Banner.



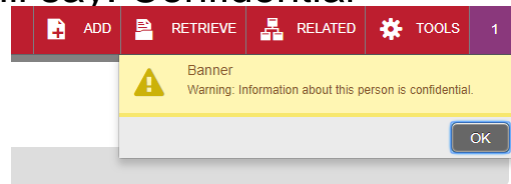
The screenshot shows a Banner system interface for a 'Person' record. On the left, there are input fields for: Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, and Full Legal Name. At the top right, there is a checkbox labeled 'Override Name Parse' and a dropdown menu for 'ID and Name Source'. A yellow warning pop-up window is overlaid on the form, containing a warning icon and the text: 'Warning: Information about this person is confidential.' with an 'OK' button.

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“Confidential” Checkbox

Banner 9

- Applies to students only
- **Set by the Registrar’s Office only**, after counseling the student on the impact
- If that box is checked, you will receive a pop-up warning the first time that the student’s record is accessed in Banner.
- And key block will say: Confidential



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Confidentiality Response

- If the “Confidential” box is checked, you may not even acknowledge that the student is in the system. Respond as follows:
“I’m sorry, I have no information about this person in this system. If you feel this is in error please have the student go to the Registrar’s Office with a valid photo ID.”
- If they begin to argue with you, say: **“The system that I can access right now over the phone doesn’t have you in it. Come in to the Registrar’s Office with a photo ID and we can check the other system.”**
- Use these statements because you cannot win the argument – if you say “I can’t tell you anything about that student because they have the confidentiality flag set” then you have confirmed that they are a student here, and you have violated their privacy.

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FERPA

- As long as there is no Confidentiality Flag, we are able to release major field of study (including current classification, year, credit load and number of academic credits earned toward degree) as well as dates of attendance. At UNM, these are considered directory information.
- For more information see:
<https://registrar.unm.edu/privacy-rights/ferpa.html>

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Directory Information

- The complete list of what is considered Directory Information at UNM is:
 - Name
 - Address (school and permanent)
 - Telephone listing
 - Electronic Mail Address
 - Date of birth
 - Major field of study (including current classification, year, credit load and number of academic credits earned toward degree)

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Directory Information Continued

- Dates of attendance (matriculation and withdrawal dates)
- Degrees and awards received (type of degree and date granted)
- Most recent previous educational agency or institution attended. Participation in officially recognized activities and sports, and weight and height of members of athletic teams.

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To Withhold Directory Information

- All students may request that directory information not be released to the public, by setting the confidentiality flag. This is an important student privilege that results in the following:
 - Student name/address are excluded from the UNM Web Directory and printed phone directories. Requests to withhold will not alter previous published directories.

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To Withhold Directory Information - Continued

- The student's name will not appear in the commencement program.
- Verification of enrollment, graduation, or degrees awarded will not be provided to third parties, including potential employers.
- No information will be released to any person (including the student) on the telephone or via email.

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GP101 Agenda

- Overview of General Person and Data Access Responsibilities
- General Person Terminology and Sites - How to Get There and Log In
- General Person Forms and Content
- How to Search
- How to Report Duplicates

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Banner Terminology

- INB: Internet Native Banner
- Banner forms: “Pages” in INB
- Form names: Always 7 letters, frequently unpronounceable, also frequently hard to remember (at first)
- Self Service = LoboWeb pages = where users can view and modify some of their own information
- “Portal” = <http://my.unm.edu>

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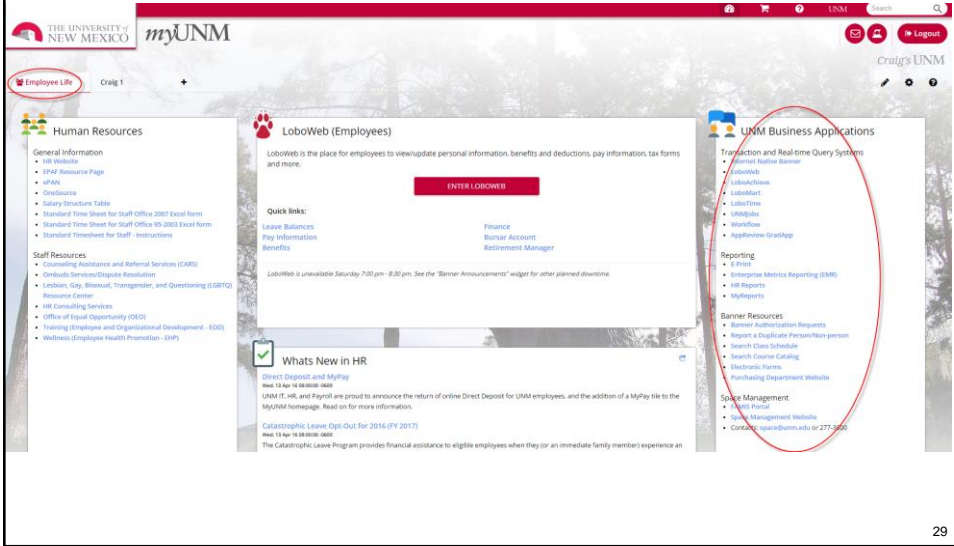
Persons and Non-Persons (Entity Indicator)

- Person (Entity indicator P): A human being with a connection to the University, such as a student, faculty, staff, affiliate, etc.
- Non-Person (Entity indicator C): An entity that conducts business with the University, such as a vendor, funding agency, grant program, or an individual (with a business name). Only Finance enters non-persons (Accounts Payable and Accounts Receivable offices). We will not discuss these today.

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The Employee Life Tab on myUNM



Employee Life

The UNM Business Applications box



Internet Native Banner

INB - the Banner application

LoboWeb

Self-service pages for students, faculty, and staff

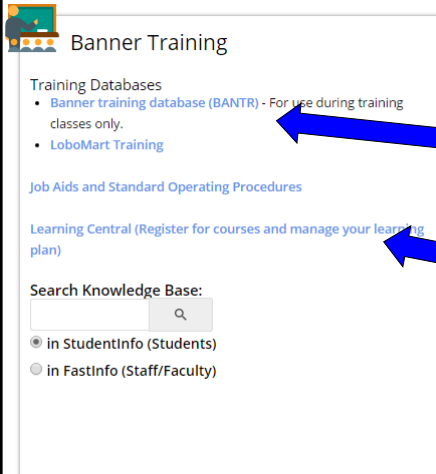
Banner Authorization Requests

“The BAR” - where to request General Person access after you pass the test

Report a Duplicate Person = DupBusters = just what it says!

The *Banner Training Box*

Below *Business Applications* and *Banner Announcements* is the *Banner Training* box.



- **Banner training DB (BANTR)**

The database that you will be using today

- **Learning Central**

Online courses such as “Banner Navigation” and “Securing Private Data”

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What is BANTR?

- **BAN**ner **TR**aining database
- Real data, but completely scrambled
- Name, address, phone, DOB, SSN, Banner ID were shuffled and redistributed across the entire database
- Allows real-world complexity in our training without compromising security
- Passwords changed every day, so access to real data is limited to training day only
- Later you will look yourself up to see how you have changed!

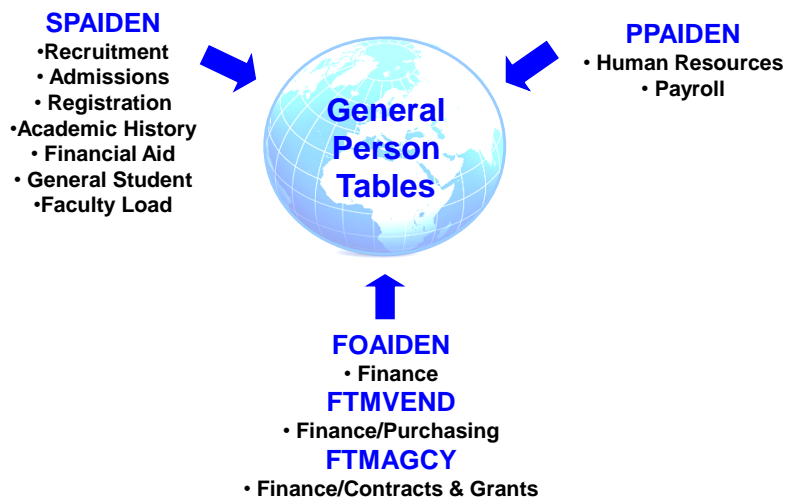
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GP101 Agenda

- Overview of General Person and Data Access Responsibilities
- General Person Terminology and Sites - How to Get There and Log In
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- How to Search
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Primary GP Data Entry Forms



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Banner Forms Naming - Decoded

- **SPAIDEN**

S = Student module

P = Person area

A = it's a form (and not a validation table or other object)

IDEN = Contains identity information

- **PPAIDEN**

P = Payroll/HR module

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****AIDEN Forms (SPAIDEN, PPAIDEN, FOAIDEN, etc.)**

- All have the same tabbed interface

- Tabs:

- Current Identification

- Alternate Identification

- Address

- Telephone

- Biographical

- Email

- Emergency Contact

- Additional Identification

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Tabbed interface of IDEN forms

Oracle Fusion Middleware Forms Services: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification: SPAIDEN 8.5.3.1 (BANP)

ID: 101685015 Test, General P. Generate ID: [icon]

Current Identification Alternate Identification Address Telephone Biographical E-mail Emergency Contact Additional Identification

Person Override Name Parse

Last Name: [Text] [dropdown]
First Name: General [dropdown]
Middle Name: Person [dropdown]
Prefix: [text]
Suffix: [text]
Preferred First Name: [text]
Full Legal Name: [text]

Non-Person

Name: [dropdown]

ID and Name Source

Last Update

User: LSJ
Activity Date: 19-JUN-2015
Origin: SPAIDEN

Original Creation

User: JKGREEN
Create Date: 08-MAY-2014

Current last name: overtpe to modify.
Record: 1/1

Key Block IDEN Forms

Banner 9

The University of New Mexico

Craig S Stevenson Sign Out ?

General Person Identification SPAIDEN 9.3.8 (BAND)

AND RETRIE RELATED TOOLS

D: 101282206 Test, General P. Go

Get Started: Fill out the fields above and press Go.

EDIT Record: 1/1 KEY_BLOCK.EXECUTE_BTN [1] ellucian

Tabbed interface of IDEN forms

Banner 9

The screenshot shows a web-based form for 'General Person Identification SPAIDEN 9.3.8 (BAND)'. The interface is tabbed, with the 'Current Identification' tab selected. The form is organized into several sections:

- IDENTIFICATION**: Contains fields for ID (101282206) and a 'Start Over' button.
- PERSON**: Includes fields for Last Name (Test), First Name (General), Middle Name (Person), Prefix, Suffix, and Preferred First Name. A 'Full Legal Name' field is also present.
- NON-PERSON**: Includes a 'Name' field.
- ID AND NAME SOURCE**: Includes 'Last Update' (Origin: SPAIDEN), 'Original Creation' (User: AHWLLIS, Create Date: 04/26/2007), and 'Activity Date' (05/03/2014 06:06:28 PM).

The bottom of the form shows 'Activity Date', 'Activity User' (JKGREEN), and a 'SAVE' button. The footer indicates 'EDIT Record: 1/1' and 'SPRIDEN_CURRENT.PERS_LAST_NAME [1]'.

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Current Identification Tab

This screenshot provides a detailed view of the 'Current Identification Tab' within the Oracle Fusion Middleware Forms Services. The form is titled 'General Person Identification: SPAIDEN 8.5.3.1 (BAND)'. The 'ID' field is set to 101685015 and the name is 'Test, General P.'. A 'Generate ID' button is visible.

The form is divided into two main sections:

- Person**: Includes fields for Last Name (Test), First Name (General), Middle Name (Person), Prefix, Suffix, Preferred First Name, and Full Legal Name. An 'Override Name Parse' checkbox is also present.
- ID and Name Source**: Includes 'Last Update' (User: LSJ, Activity Date: 19-JUN-2015, Origin: SPAIDEN) and 'Original Creation' (User: JKGREEN, Create Date: 08-MAY-2014).

The bottom of the form shows a status bar with 'Current last name, otype to modify.', 'Record: 1/1', and '<OSC>'.

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Current Identification Tab

Banner 9

The screenshot shows the Banner 9 interface for the 'Current Identification' tab. The header includes 'The University of New Mexico' and user information for 'Craig S Stevenson'. The main content area is divided into several sections: 'IDENTIFICATION', 'PERSON', 'NON-PERSON', and 'ID AND NAME SOURCE'. The 'PERSON' section contains fields for 'Last Name' (Test), 'First Name' (General), 'Middle Name' (Person), 'Prefix', 'Suffix', 'Preferred First Name', and 'Full Legal Name'. The 'ID AND NAME SOURCE' section shows 'Last Update' information, including 'Origin' (SPRIDEN), 'Original Creation' (User: AHWLLIS, Create Date: 04/26/2007), and 'Activity Date' (05/03/2014 06:06:28 PM). The footer indicates 'Record 1/1' and 'SPRIDEN_CURRENT.PERS_LAST_NAME [1]'.

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Names (Current Identification)

- A person can only have one current name at a time
- The name entered must be the person's full name as it appears on their Social Security card
- Previous names are kept in the Banner database on the Alternate Identification Tab. There is only one current name stored, but there may be multiple previous names.
- In all cases, if the person's record contains an SSN, a **new Social Security Card must be presented to change a name.**
- Only a few offices are allowed to change name data, and must follow strict procedures

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Current Identification Tab

Oracle Fusion Middleware Forms Services: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification: SPAIDEN 8.5.3.1 (BANDP)

ID: 101685015 Test, General P. Generate ID: [icon]

Current Identification Alternate Identification Telephone Biographical E-mail Emergency Contact Additional Identification

Current name

Last update

Who created the record originally

Person Override Name Parse

Last Name: [dropdown]

First Name: [dropdown]

Middle Name:

Prefix:

Suffix:

Preferred First Name:

Full Legal Name:

Non-Person

Name:

ID and Name

Last Update

User:

Activity Date:

Origin:

Original Creation

User:

Create Date:

Current last name: overtype to modify.

Record: 1/1

Current Identification Tab

Banner 9

The University of New Mexico

Craig S Stevenson Sign Out ?

General Person Identification SPAIDEN 9.3.8 (BAND) ADD RETRIEVE RELATED TOOLS

ID: 101282206 Test, General P. Start Over

Current Identification Alts Address Telephone Biographical E-mail Emergency Contact Additional Identification

IDENTIFICATION

Current name

PERSON

Last Name: [dropdown]

First Name: [dropdown]

Middle Name:

Prefix:

Suffix:

Preferred First Name:

Full Legal Name:

NON-PERSON

Name:

ID AND NAME SOURCE

Last Update

Origin:

Original Creation

User: Create Date:

Activity Date: 05/03/2014 06:08:28 PM Activity User: JKGREEN

EDIT Record: 1/1 SPRIDEN_CURRENT PERS_LAST_NAME [1] ellucian

Alternate Identification Tab

Oracle Fusion Middleware Forms Services: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification SPAIDEN 8.5.3.1 (BANP)

ID: 101685015 Test, General P. Generate ID:

Current Identification **Alternate Identification** Address Telephone Biographical E-mail Emergency Contact Additional Identification

Alternate Names or IDs

| | | |
|-----------------------------------|-------------------|----------------------------|
| Name Type: <input type="text"/> | Change Type: Name | Origin: GOAMTCH |
| ID: 101685015 | | User: LSJ |
| Last Name: Test | | Activity Date: 19-JUN-2015 |
| First Name: General | | Create User: LSJ |
| Middle Name: <input type="text"/> | | Create Date: 19-JUN-2015 |

| | | |
|-----------------------------------|-----------------------------------|-------------------------------------|
| Name Type: <input type="text"/> | Change Type: <input type="text"/> | Origin: <input type="text"/> |
| ID: <input type="text"/> | | User: <input type="text"/> |
| Last Name: <input type="text"/> | | Activity Date: <input type="text"/> |
| First Name: <input type="text"/> | | Create User: <input type="text"/> |
| Middle Name: <input type="text"/> | | Create Date: <input type="text"/> |

Previous Name Type Code, press LIST for values.
Record: 1/1 | ... | List of Valu... | <OSC>

Alternate Identification Tab

Banner 9

The University of New Mexico

Craig S Stevenson Sign Out ?

General Person Identification SPAIDEN 9.3.8 (BAND)

ADD RETRIEVE RELATED TOOLS

ID: 101282206 Test, General P. Start Over

Current Identification **Alternate Identification** Address Telephone Biographical E-mail Emergency Contact Additional Identification

ALTERNATE NAMES OR IDS

| | | |
|---------------------------------|-------------------|-------------------------|
| Name Type: <input type="text"/> | Change Type: Name | First Name: General |
| ID: 101282206 | | Middle Name: P |
| Last Name: Test | | Origin: SPAIDEN |
| | | Create User: JKGREEN |
| | | Create Date: 05/03/2014 |

1 of 4 | 1 Per Page | Record 1 of 4

Activity Date: 05/03/2014 06:08:28 PM Activity User: JKGREEN

EDIT Record 1/4 SPRIDEN_PREVIOUS_SPRIDEN_NTYP_CO... ellucian

Alternate Names or IDs

Banner keeps a history of the two types of identification records, distinguished by the Change Type box:

- **NAME**: Former names
- **ID**: Former IDs, including
 - Legacy IDs from the mainframe system before Banner (called Per-Seq-Num, or person sequence number)
 - Other Banner-generated IDs (such as temporary Web IDs)
 - Inactive Banner IDs that result from merging duplicates.

It is important to retain both types of records so a person's history can be researched, and because GOAMTCH will look at alternate names to find name matches.

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Alternate Identification Tab

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Alternate Identification Tab

Banner 9

The screenshot shows the Banner 9 interface for a 'General Person Identification' record. The record ID is 101282206. The 'Alternate Identification' tab is active, showing a table with columns for Name Type, Change Type, ID, and Last Name. The 'Change Type' is set to 'Name'. A yellow arrow points to the 'Change type (name or ID)' dropdown menu. Another yellow arrow points to the 'Prior name' field, which is currently empty. The 'First Name' is 'General', 'Middle Name' is 'P', and 'Origin' is 'SPAIDEN'. The 'Create User' is 'JKGREEN' and the 'Create Date' is '05/03/2014'. The page number '49' is visible in the bottom right corner.

Alternate Identification Tab

Banner 9

The screenshot shows the Banner 9 interface for a 'General Person Identification' record. The record ID is 101282206. The 'Alternate Identification' tab is active, showing a table with columns for Name Type, Change Type, ID, and Last Name. The 'Change Type' is set to 'ID'. A yellow arrow points to the 'Prior ID' field, which is currently empty. The 'First Name' is 'Person', 'Middle Name' is empty, and 'Origin' is 'PER-SEQ-NUM'. The 'Create User' is 'LEGACY' and the 'Create Date' is empty. The page number '50' is visible in the bottom right corner.

Address Tab

Oracle Fusion Middleware Forms Services: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification SPAIDEN 8.5.3.1 (BANP)

ID: 101685015 Test, General P. Generate ID: [Generate]

Current Identification Alternate Identification **Address** Telephone Biographical E-mail Emergency Contact Additional Identification

From Date: [] To Date: []

Address Type: []

Sequence Number: []

Street Line 1: []

Street Line 2: []

Street Line 3: []

Foreign Province: []

City: []

US State: []

ZIP or Postal Code: []

NM County: []

Foreign Nation: []

Telephone Type: []

Area Code: [] Phone Number: [] Extension: []

Inactivate Address

Source: []

Override Address Verification

Delivery Point: []

Correction Digit: []

Carrier Route: []

Last Update

User: []

Activity Date: []

Address start date, format (DD-MON-YYYY); blank is always effective.

Record: 1/1

Address Tab

Banner 9

The University of New Mexico

Craig S Stevenson Sign Out

General Person Identification SPAIDEN 9.3.8 (BAND)

ADD RETRIEVE RELATED TOOLS

ID: 101282206 Test, General P. Start Over

Current Identification Alternate Identification **Address** Telephone Biographical E-mail Emergency Contact Additional Identification

ADDRESS INFORMATION

From Date: 10/04/2015 To Date: []

Address Type: MA Mailing

Sequence Number: 1

Street Line 1: 500 Central Ave SW

Street Line 2: []

Street Line 3: []

Street Line 4: []

City: Albuquerque

State or Province: NM New Mexico

ZIP or Postal Code: 87102-3114

County: 001 Bernalillo

Nation: []

Telephone Type: MA Mailing

Area Code: 505

Phone Number: 5551234

Extension: []

Inactivate Address

Source: []

Delivery Point: 00

Correction Digit: 3

Carrier Route: C008

Skip Address Verify Address Verified

Record 1 of 1

Activity Date: 09/05/2017 09:37:48 AM Activity User: MBERRENS

EDIT Record 1/1 SPRADDR SPRADDR_FROM_DATE [1] ellucian

Address Types

We use different address types for different purposes

| Address Code | Address Type | Description and Usage |
|--------------|----------------|--|
| MA | Mailing | UNM's default address type, MA should be used if only one address exists. Used by all updating offices. |
| BI | Billing | Used by the Accounts Receivable Offices for customers (including students if different than their mailing address). Available in DSS. |
| BK | Bookstore | Used only by Accounts Payable for Bookstore Vendor addresses |
| BU | Business | Used only by Accounts Payable and the Purchasing Offices for Vendor addresses. |
| GR | Grant Billing | Used only by the Research Accounting Offices for Agency addresses. |
| PE | Permanent | Used by Recruitment for a student's permanent address and by GEO for International Student's and Scholar's home country (foreign) address. Available in DSS. |
| PH | Physical | Address where one physically lives, if different than their mailing address (MA is a PO Box). Required for international students. |
| RH | Residence Hall | Used only by Student Housing for students living in one of UNM's residence halls. Automatically updated by Housing each semester. |

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Addresses

- The default address type is MA for Mailing.
- A person can have **one active address for each address type** in Banner. Identical addresses should not be entered as different address types.
- County: The County field is being used for New Mexico counties only and will automatically populate with use of zip code. You never need to enter data in this field.

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Address Verification Functionality

- We have an address verification tool built into Banner
- Checks addresses against the U.S. Postal Service database of deliverable addresses, which is updated monthly
- Only checks U.S. addresses (where the Nation field is blank)
- All address types are verified except RH (Residence Hall)

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Address Formatting Functionality

The diagram illustrates the address formatting process. On the left, an input form contains the following fields: Street Line 1 (1503 marin luther king), Street Line 2 (empty), Street Line 3 (empty), City (empty), State or Province (dropdown), ZIP or Postal Code (87106), County (dropdown), and Nation (dropdown). A blue arrow labeled 'tab' points to the right, where the formatted output form is shown. The formatted form displays: Street Line 1 (1503 Dr Martin Luther King Jr), Street Line 2 (empty), Street Line 3 (empty), City (Albuquerque), State or Province (NM dropdown), ZIP or Postal Code (87106-4505 dropdown), County (001 dropdown), and Nation (Bernalillo dropdown).

- Formats addresses to match U.S. Postal Service standards
- Removes punctuation, standardizes street and directional abbreviations
- Fills in city and state fields
- Adds +4 to zip code
- Adds county code for NM addresses

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Telephone Tab

Oracle Fusion Middleware Forms Services: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification SPAIDEN 8.5.3.1 (BANP)

ID: 101685015 Test, General P. Generate ID: [icon]

Current Identification Alternate Identification Address Telephone Biographical E-mail Emergency Contact Additional Identification

Telephone Type: [dropdown] [text]
 International Access: [text]
 Comment: [text]
 Address Type: [dropdown] [text] Sequence: [dropdown]

Area Code [text] Phone Number [text] Extension [text]
 Primary Unlisted Inactivate

Activity Date: [text] User: [text]

Telephone Type: [dropdown] [text]
 International Access: [text]
 Comment: [text]
 Address Type: [dropdown] [text] Sequence: [dropdown]

Area Code [text] Phone Number [text] Extension [text]
 Primary Unlisted Inactivate

Activity Date: [text] User: [text]

Telephone Type: [dropdown] [text]
 International Access: [text]
 Comment: [text]
 Address Type: [dropdown] [text] Sequence: [dropdown]

Area Code [text] Phone Number [text] Extension [text]
 Primary Unlisted Inactivate

Activity Date: [text] User: [text]

Phone type code; press LIST for valid codes.
 Record: 1/1 | ... | List of Valu... | <OSC>

Telephone Tab

Banner 9

The University of New Mexico

Craig S Stevenson Sign Out ?

General Person Identification SPAIDEN 9.3.8 (BAND) ADD RETRIEVE RELATED TOOLS

ID: 101282206 Test, General P. Start Over

Current Identification Alternate Identification Address Telephone Biographical E-mail Emergency Contact Additional Identification

TELEPHONE INFORMATION Insert Delete Copy Filter

Telephone Type * MA ... Mailing

Area Code 505

Phone Number 5551234

Extension [text]

International Access [text]

Primary
 Unlisted
 Inactivate

Comment [text]

Address Type MA ... Mailing

Sequence 1 ...

Record 1 of 1

Activity Date 08/05/2017 09:38:09 AM Activity User MBERRENS SAVE

EDIT Record: 1/1 SPRTELE.SPRTELE_TELE_CODE [1] ellucian

Telephone Types

| Phone Code | Phone Type | Description and Usage |
|------------|----------------|--|
| BI | Billing | Phone number associated with a Billing address . |
| BK | Bookstore | Phone number associated with a Bookstore address. |
| BU | Business | Phone number associated with a Business address. |
| CE | Cell | A cell phone number – may be associated with an Address of any type. |
| FAX | Fax | A phone number that accepts facsimiles. |
| GR | Grant Billing | Phone number associated with a Grant Billing address. |
| MA | Mailing | Phone number associated with a Mailing address. |
| PE | Permanent | Phone number associated with a Permanent address. |
| PH | Physical | Phone number associated with a Physical address. |
| RH | Residence Hall | Phone number associated with a Residence Hall address. Updated by Housing only. |
| CA | Campus | Phone number associated with a staff or faculty office phone number. |

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Telephone Numbers

- A person may have multiple telephone numbers.
- A telephone number can be entered without an address or it can be associated with an address.
- Cell phones should always be entered as type CE.
- You can associate a cell phone with a MA address by selecting CE as the phone type on the Address Tab.

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Enter phone and address together

Oracle Fusion Middleware Forms Services: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification SPAIDEN 8.5.3.1 (BANP)

ID: 101685015 Test, General P. Generate ID: [button]

Current Identification Alternate Identification **Address** Telephone Biographical E-mail Emergency Contact Additional Identification

From Date: [calendar] To Date: [calendar] Inactivate Address
Address Type: [dropdown] Source: [dropdown]
Sequence Number: [input] Override Address Verification
Delivery Point: [input]
Correction Digit: [input]
Carrier Route: [input]

Street Line 1: [input]
Street Line 2: [input]
Street Line 3: [input]
Foreign Province: [input]
City: [input]
US State: [dropdown]
ZIP or Postal Code: [input]
NM County: [dropdown]
Country: [input]

Telephone Type: [input]

Area Code [input] Phone Number [input] Extension [dropdown]

Last Update
User: [input]
Activity Date: [input]

Address start date, format (DD-MON-YYYY); blank is always effective.
Record: 1/1 | ... | <OSC>

Phone numbers can be associated with addresses, either cell or landline

Enter phone and address together

Banner 9

The University of New Mexico

Craig S. Stevenson Sign Out ?

General Person Identification SPAIDEN 9.3.8 (BAND) ADD RETRIEVE RELATED TOOLS

ID: 101282206 Test, General P. Start Over

Current Identification Alternate Identification **Address** Telephone Biographical E-mail Emergency Contact Additional Identification

ADDRESS INFORMATION

From Date: 10/04/2013 To Date: [calendar] Skip Address Verify Address Verified
Address Type: MA Mailing Telephone Type: MA Mailing
Sequence Number: [input] Nation: [input]
Street Line 1: 500 Co. Area Code: 505
Street Line 2: [input] Phone Number: 5551234
Street Line 3: [input] Extension: [input]
Street Line 4: [input] Inactivate Address
City: Albuquerque Source: [input]
State or Province: NM New Mexico Delivery Point: 00
ZIP or Postal Code: 87102-3114 Correction Digit: 3
County: 001 Bernalillo Carrier Route: C008

Activity Date: 08/05/2017 09:37:48 AM Activity User: MBERRENS SAVE
Record: 1/1 SPRADLR SPRADLR_FROM_DATE (1) ellucian

Phone numbers can be associated with addresses, either cell or landline

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Biographical Tab

Oracle Fusion Middleware Forms Services: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification SPAIDEN 8.5.3.1 (BANP)

ID: 101685015 Test, General P. Generate ID: [icon]

Current Identification Alternate Identification Address Telephone **Biographical** E-mail Emergency Contact Additional Identification

Gender: Male Female Not Available

Birth Date: [calendar icon] Confidential

Age: [text] Deceased

SSN/SIN/TIN: [text] Deceased Date: [calendar icon]

Citizenship: [dropdown] Veteran File Number: [text]

Marital Status: [dropdown] Veteran Classification: Not a Veteran [dropdown]

Religion: [dropdown] Date of Discharge: [calendar icon]

Legacy: [dropdown] Armed Forces Service Medal Indicator

New Ethnicity: None [dropdown] Disabled Veteran

User: [text]

Activity Date: [text]

| Race | User | Activity Date |
|------------|--------|---------------|
| [dropdown] | [text] | [text] |
| [text] | [text] | [text] |
| [text] | [text] | [text] |

Gender Record: 1/1 <<OSC>

Biographical Tab

Banner 9

The University of New Mexico

Craig S Stevenson Sign Out ?

General Person Identification SPAIDEN 9.3.8 (BAND) ADD RETRIEVE RELATED TOOLS

ID: 10128206 Test, General P. Start Over

Current Identification Alternate Identification Address Telephone **Biographical** E-mail Emergency Contact Additional Identification

BIOGRAPHICAL INFORMATION [Insert] [Delete] [Copy] [Filter]

Gender: Male Female Not Available Legacy: [dropdown]

Birth Date: 08/08/1988 [calendar icon] New Ethnicity: None [dropdown]

Age: 29 Ethnicity and Race Confirmed

SSN/SIN/TIN: 303303993 Deceased Deceased Date: [calendar icon]

Ethnicity and Race Confirmed Date: [calendar icon]

Confidential Deceased

Veteran File Number: [text]

Deceased Date: [calendar icon] Veteran Classification: Not a Veteran [dropdown]

Citizenship: [dropdown] Date of Discharge: [calendar icon]

Marital Status: [dropdown] Armed Forces Service Medal Indicator

Religion: [dropdown] Disabled Veteran

RACE INFORMATION [Insert] [Delete] [Copy] [Filter]

| Race * | Description |
|--------|-------------|
| [text] | [text] |

Record 1 of 1

Activity Date: 05/03/2014 06:04:11 PM Activity User: JKGREEN SAVE

EDIT Record 1/1 SPBSPERS.SPBPERS_S0VET_IND [1] ellucian

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Date of Birth (DOB)

- The Date of Birth is a key identifier and should be entered whenever possible.
- NOTE that the month and day fields are **backwards** on GOAMTCH, with day coming before month. Be very careful when entering DOB on GOAMTCH.
- Can be entered as 13-JAN-1988 or 01/13/1988 on the *IDEN forms
- Only certain offices may change DOB, following strict procedures

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Social Security Number (SSN)

- Students provide their SSN on their application for admission or their Application for Federal Student Aid (FAFSA).
- Employees provide their SSN as part of the hiring process (they must provide an I-9 document (Federal Employment Eligibility Verification form) along with appropriate documentation of identity and work status)
- We provide “dummy” SSNs for certain individuals as needed (international or undocumented students, foreign nationals, etc.)
- “Dummy” SSNs start with 999 or 000

66

Other Data Elements on Biographical Tab

- Citizenship Code
 - Entered by Payroll and a few other offices
- Marital Status, Religion, and Legacy
 - Not used by UNM
 - “Legacy” is used by some schools for kids of alumni
- Deceased Indicator
 - Entered by the Registrar’s Office (students) or the Benefits Office (employees) only
- Gender
 - Required for benefits
- Veteran File Information
 - Entered by HR or person themselves via LoboWeb
- Race and Ethnicity
 - Entered by Admissions, HR, or person themselves via LoboWeb

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Only enter the data provided

- Many people are tempted to fill in additional information because there is a blank there and they know the answer
- You **MAY NOT** enter data that is not on the form in front of you (admissions application, employment application, data change request, etc.)
- **DO NOT enter gender, race, ethnicity, vet status, etc. if that information has not been provided by the person**
- Doing so is a violation of the data use and responsibilities policy discussed earlier

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Biographical Tab

Oracle Fusion Middleware Forms Services: Open > SPAIDEN

General Person Identification SPAIDEN 8.5.3.1 (BANP)

ID: 101685015 Test, General P. Generate ID: [icon]

Current Identification Alternate Identification Address Telephone **Biographical** E-mail Emergency Contact Additional Identification

Gender: Male Female Not Available

Birth Date: [calendar icon]

Age: [calendar icon]

SSN/SIN/TIN: [calendar icon]

Deceased Date: Confidential Deceased [calendar icon]

Citizenship: [dropdown]

Marital Status: [dropdown]

Religion: [dropdown]

Legacy: [dropdown]

New Ethnicity: [dropdown]

Veteran File Number: [calendar icon]

Veteran Classification: Not a Veteran [dropdown]

Date of Discharge: [calendar icon]

Armed Forces Service Medal Indicator

Disabled Veteran

User: [calendar icon]

Activity Date: [calendar icon]

| Race | User | Activity Date |
|------------|-----------------|-----------------|
| [dropdown] | [calendar icon] | [calendar icon] |

Gender Record: 1/1

Biographical Tab

Banner 9

The University of New Mexico

Craig S Stevenson Sign Out ?

General Person Identification SPAIDEN 9.3.8 (BAND)

ID: 10128206 Test, General P. Start Over

Current Identification Alternate Identification Address Telephone **Biographical** E-mail Emergency Contact Additional Identification

BIOGRAPHICAL INFORMATION

Gender: Male Female Not Available

Birth Date: [calendar icon]

SSN/SIN/TIN: [calendar icon]

Deceased Date: Confidential Deceased [calendar icon]

Citizenship: [dropdown]

Marital Status: [dropdown]

Religion: [dropdown]

Legacy: [dropdown]

New Ethnicity: [dropdown]

Ethnicity and Race Confirmed Date: [calendar icon]

Veteran File Number: [calendar icon]

Veteran Classification: Not a Veteran [dropdown]

Date of Discharge: [calendar icon]

Armed Forces Service Medal Indicator

Disabled Veteran

| Race | Description |
|------------|-------------|
| [dropdown] | [dropdown] |

Record 1 of 1

Activity Date: 05/03/2014 06:04:11 PM Activity User: JKGREEN

SPBSPERS SPBSPERS_SOVET_IND [1]

Email Tab

Oracle Fusion Middleware Forms Services: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification SPAIDEN 8.5.3.1 (BANP)

ID: 101685015 Test, General P. Generate ID: [icon]

Current Identification Alternate Identification Address Telephone Biographical **E-mail** Emergency Contact Additional Identification

E-mail Type: [dropdown]
 E-mail Address: [text field]
 Preferred Inactivate Display on Web URL
 Comment: [text field] Activity Date: [text field] User: [text field]

E-mail Type: [dropdown]
 E-mail Address: [text field]
 Preferred Inactivate Display on Web URL
 Comment: [text field] Activity Date: [text field] User: [text field]

E-mail Type: [dropdown]
 E-mail Address: [text field]
 Preferred Inactivate Display on Web URL
 Comment: [text field] Activity Date: [text field] User: [text field]

FRM-40350: Query caused no records to be retrieved.
 Record: 1/1 | ... | List of Valu... | <OSC>

Email Tab

Banner 9

The University of New Mexico

Craig S Stevenson Sign Out ?

General Person Identification SPAIDEN 9.3.8 (BAND) ADD RETRIEVE RELATED TOOLS

ID: 101282206 Test, General P. Start Over

Current Identification Alternate Identification Address Telephone Biographical **E-mail** Emergency Contact Additional Identification

E-MAIL INFORMATION Insert Delete Copy Filter

E-mail Type: [dropdown]
 E-mail Address: [text field]
 Preferred Inactivate Display on Web URL
 Comment: [text field]

1 of 1 Per Page Record 1 of 1

EDIT Record: 1/1 GOREMAL_GOREMAL_EMAIL_CODE [1] ellucian

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Email Addresses

- There are 2 email types: UNM and ALTN (alternate)
- **Never enter a UNM type email.** These addresses are automatically created when a person gets a UNM NetID.
- Each person should have only one preferred email
- If the e-mail address has @salud.unm.edu, @gallup.unm.edu, etc., it is designated as e-mail type ALTN and is the preferred e-mail, even if there is an existing UNM email address.
- Demographic Self Service allows a person to enter a non-UNM email address that is displayed in the UNM Online Directory. If a preferred email is not entered, the @unm.edu email will be displayed, if available.

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Emergency Contact Tab

The screenshot shows the 'Emergency Contact' tab in the SPAIDEN system. The interface includes a menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Help) and a toolbar. The main content area is divided into several sections:

- Current Identification:** ID: 101685015, Test, General P. Generate ID: [button]
- Emergency Contact Tab:** Contains fields for Priority, Relationship, Last Name, First Name, Middle Name, Address Type, Street Line 1-4, City, State or Province, ZIP or Postal Code, and Nation.
- Telephone:** Fields for Area Code, Phone Number, and Extension.
- Last Update:** Fields for User and Activity Date.
- Override Address Verification:** A checkbox.

At the bottom, there is a status bar with the text: "Priority of this contact in relation to other contacts; values (1 through 9). Record: 1/1 | ... | <OSC> 74"

Emergency Contact Tab

Banner 9

The screenshot displays the 'Emergency Contact' tab within the Banner 9 interface. The user is logged in as Craig S Stevenson. The form is for a person with ID 10128206. The 'Emergency Contact' tab is active, showing a form with various fields for contact details. A 'Start Over' button is located at the top right of the form area. The bottom of the page shows a 'SAVE' button and a status bar with 'Record 1/1'.

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Additional Identification Tab

The screenshot displays the 'Additional Identification' tab within the Banner 9 interface. The user is logged in as Craig S Stevenson. The form is for a person with ID 101685015. The 'Additional Identification' tab is active, showing a table with columns for ID Type, Description, Additional Identification, Activity Date, and User. The table contains one row with the following data: ID Type: PDW, Description: Person's base id, Additional Identification: 1685028, Activity Date: 08-MAY-2014, User: GENERALAPPWORX. A status bar at the bottom indicates 'Record: 1/1' and 'List of Valu...'. The page number '76' is visible in the bottom right corner.

| ID Type | Description | Additional Identification | Activity Date | User |
|---------|------------------|---------------------------|---------------|----------------|
| PDW | Person's base id | 1685028 | 08-MAY-2014 | GENERALAPPWORX |

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Additional Identification Tab

Banner 9

The University of New Mexico | Craig S Stevenson | Sign Out

General Person Identification SPAIDEN 9.3.8 (BAND) | ADD | RETRIEVE | RELATED | TOOLS

ID: 101282206 Test, General P | Start Over

Current Identification | Alternate Identification | Address | Telephone | Biographical | E-mail | Emergency Contact | **Additional Identification**

IDENTIFICATION | Insert | Delete | Copy | Filter

| ID Type | Description | Additional Identification |
|---------|------------------|---------------------------|
| IDM | Person's base id | 1282225 |

Record 1 of 1

Activity Date: 04/19/2012 03:29:25 PM | Activity User: GENERALAPPWORX | SAVE

EDIT | Record: 1/1 | GORADID.GORADID_ADID_CODE [1] | ellucian

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SPACMNT – GP Comments

“Space Mountain”

Person Comment Form: SPACMNT 8.2 (DEVL)

ID: 101282206 | Test, General P.

Comment Type: 100 General Comment | Appointments: | Confidentiality:

Originator: | From Time:

Contact: | To Time:

Contact Date: 18-NOV-2010 | Add Date: 18-NOV-2010 | Activity Date: 18-NOV-2010 | Last Updated by:

Comments:
 SSN was verified with card. Image is on file.

Narrative Comments:

Short Comment Text (free form). | Record: 1/1 | <08C>

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SPACMNT – GP Comments

“Space Mountain”

Banner 9

The screenshot shows the Banner 9 interface for the SPACMNT Person Comment Form. The header includes the University of New Mexico logo and user information for Craig S. Stevenson. The form title is 'Person Comment Form SPACMNT 9.3 (BAND)'. The record ID is 101282206, with 'Test, General P' as the test name. A green message box indicates a query error: 'Query caused no records to be retrieved. Re-enter.' The form fields include: Comment Type (dropdown), Originator (dropdown), Contact (dropdown), Contact Date (03/09/2018), From Time (text), To Time (text), Add Date (text), Activity Date (03/09/2018), Last Updated by (text), Confidentiality (checkbox), and two large text areas for Comments and Narrative Comments. The bottom of the screen shows 'Record 1 of 1' and the 'ellucian' logo.

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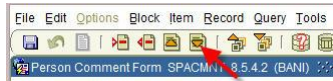
Other important page: SPACMNT

- Every change to General Person data must be accompanied by a comment in SPACMNT, NOT the area comment form (NOT in Admissions comments or Payroll comments, etc.)
- SPACMNT comments can be seen by everyone, whereas the area comments cannot
- Look here for explanations of name changes, SSN, DOB, duplicate status, etc.

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Different comment types

- Can have multiple of each
- Some machine added and some by people
- You can view the comments by pressing 'next record' button in SPACMNT to cycle through them



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Different comment types

Banner 9

- Can have multiple of each
- Some machine added and some by people
- You can view the comments by pressing below button in SPACMNT to cycle through them



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GP101 Agenda

- Overview of General Person and Data Access Responsibilities
- General Person Terminology and Sites - How to Get There and Log In
- General Person Forms and Content
- **How to Search**
- How to Report Duplicates

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Finding the Right Person



84

Searching matters: odds are good that the person is in Banner

- There are 1.6 million people in the database. There are only 2.1 million in the entire state!
- Top last names in Banner:
 - Martinez 30,219
 - Garcia 26,368
 - Smith 21,301
 - Sanchez 17,792
 - Johnson 17,776
 - Chavez 17,722
 - Lopez 14,245
 - Brown 12,838
- Top first and last names:
 - Michael Martinez 293
 - Maria Martinez 252
 - Daniel Martinez 246
 - Michael Garcia 246

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Why we practice searching – avoiding creating duplicates

Chris Stewart Neel
Christopher Stewart Neel
Katik Nandina
Kartik Nandina

Katie A Morris
Kathryn A Morris
Raymond A Morgan
Ray A Morgan

Angelica Munoz
Angelica Munoz – 2 SSNs
Devin I Franklin
Devin Johanna Franklin

Ben Myers
Benjamin X Nigel Myers

Rudy Moreno
Rodolfo Moreno

Lauren G Tagliaferro-Epl
Lauren G Tagliaferro Epler

Stephanie Muehle
Stefanie Muehle

Jessica S Padilla
Jessica S Hernandez

Jonathan Tibbitts
Jonathan Markus Tibbetts

Rosie Moya
Rose Alvarez Moya

Ibra Dominguez
ibrahim H Dominguez

Alondra I Beltran-Chavarr
Alondra I Beltran

Cristine Mowrey
Christine Lorraine Mowrey

Davd M McFarland
David Mendoza McFarland

Hay Le B Schmidt
Haylie B Schmidt

Victoria Leah Ortiz
Vickie Leah Ortiz

Suzy May
S Mary May

Clint McCaleb
Clinton Thomas Ralph McCaleb

Ganapathirajuisweswara Narasimhasingarajuvarma -- Test Scores
V Narasimha Singaraju Varma Ganapathiraju -- Web Application

Ganapathirajumanikanta Varahalavenkatapatiraju -- Test Scores
Manikanta Varahala Venkatapati Raju Ganapathiraju -- Web Application

86

What are duplicates?

- A “duplicate” occurs when the same person is created multiple times in Banner, and has two (or more!) Banner IDs
- Caused by
 - Inconsistency in data given by applicant on different tests and applications (nicknames, different addresses, typos, etc.)
 - Administrator error or sloppiness in manual searching
 - Machine inflexibility, inability to recognize similarity

87

Consequences of duplicates

- Consequences
 - Unable to be admitted due to incomplete application (test scores on dup)
 - Unable to register, or for a particular class because pre-reqs on other record
 - Unable to be paid
 - Ineligible for benefits
- Consequences can be huge
 - For users, can be life-alteringly bad (not admitted, can't register, not paid)
 - For institution, at best inaccurate or inefficient, at worst Federal penalties

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What are “bad matches”?

- “Bad matches” occur when a person or system
 - mistakenly matches new record A with existing record B...
 - and loads A’s data onto B’s record
- Causes and consequences are same as duplicates
- Resolution is even more difficult than duplicates because data must be untangled
- Sometimes overwritten data cannot be recovered
- Equally critical to prevent these from happening

89

Teaching you how to search

- That is why we will spend the rest of the class on searching
- Teach you to not create duplicates or bad matches
- Teach you to recognize possible dups when you come across them...
- ...And report them to the appropriate authorities (us!)

90

Accurate searching is hard

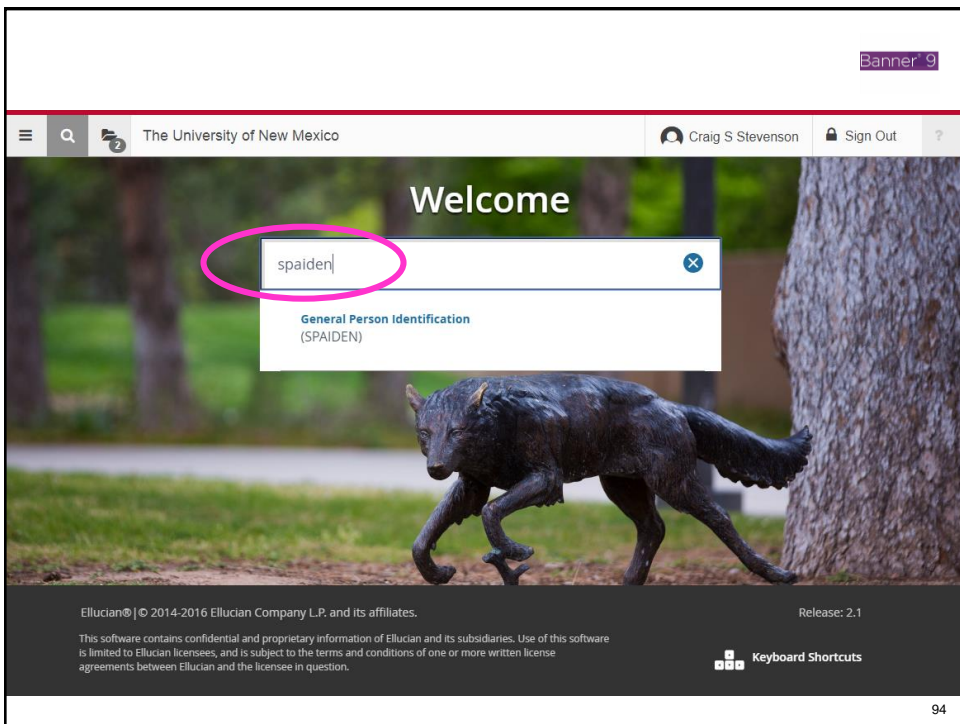
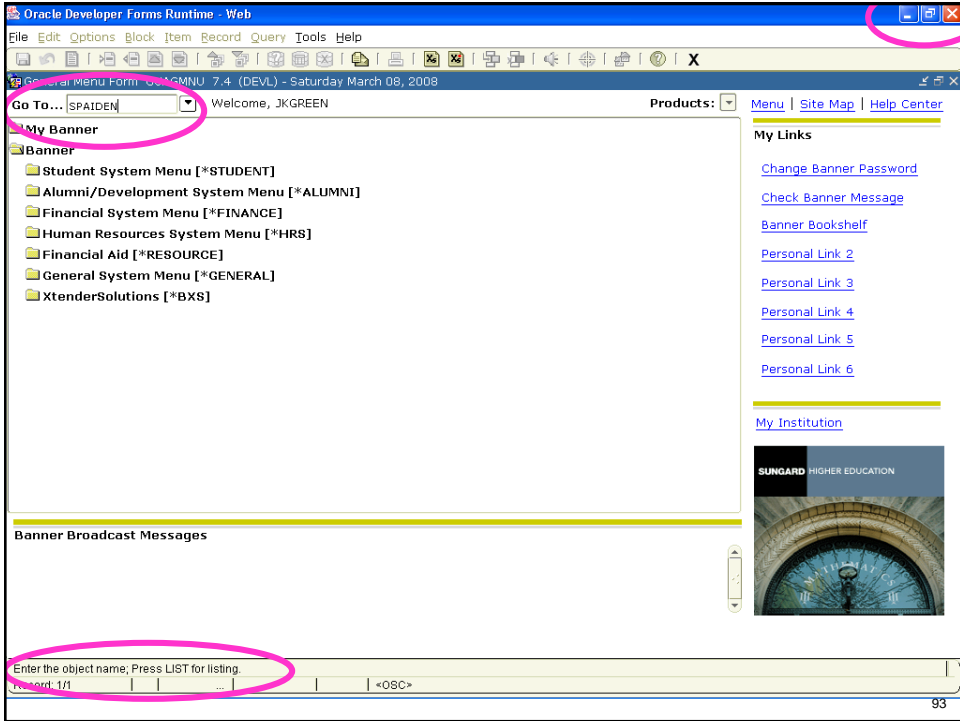
- Many similar entries to search through
 - There are 3.5 million records in the database
 - Many similar names – Michael Martinez!
- People's data often change over time
 - Names change (last names, nicknames, middle names, typos, transposed)
 - Addresses change
 - Phone numbers change
 - People have multiple email addresses
 - DOBs change (missing, transposed month and day, typos)
 - SSNs change (missing, immigration status, typos, transposition)

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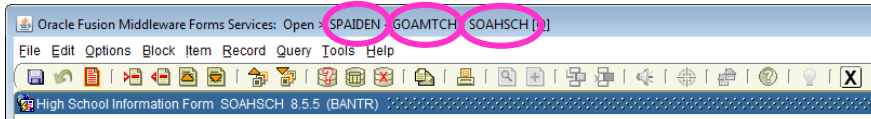
GP Query and Update Forms

- | • Query-Only Forms | • Update Forms |
|--------------------|------------------|
| – FOAIDEN | – SPAIDEN |
| – SOAIDEN | – PPAIDEN |
| – ROAIDEN | – GOAMTCH |
| – SOAIDNS | |
| – GUIALTI | |
| – GUISRCH | |
| – GZAIDEN | |

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Where am I? Banner breadcrumbs

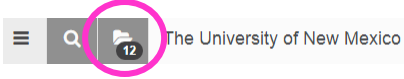


- Banner keeps track of where you are and how you got there in the menu bar
- These “breadcrumbs” let you know where you will end up when you close the current form
 - In the example above, you started on SPAIDEN, went to GOAMTCH, then SOAHSCH. Closing the SOAHSCH form will bring you back to GOAMTCH

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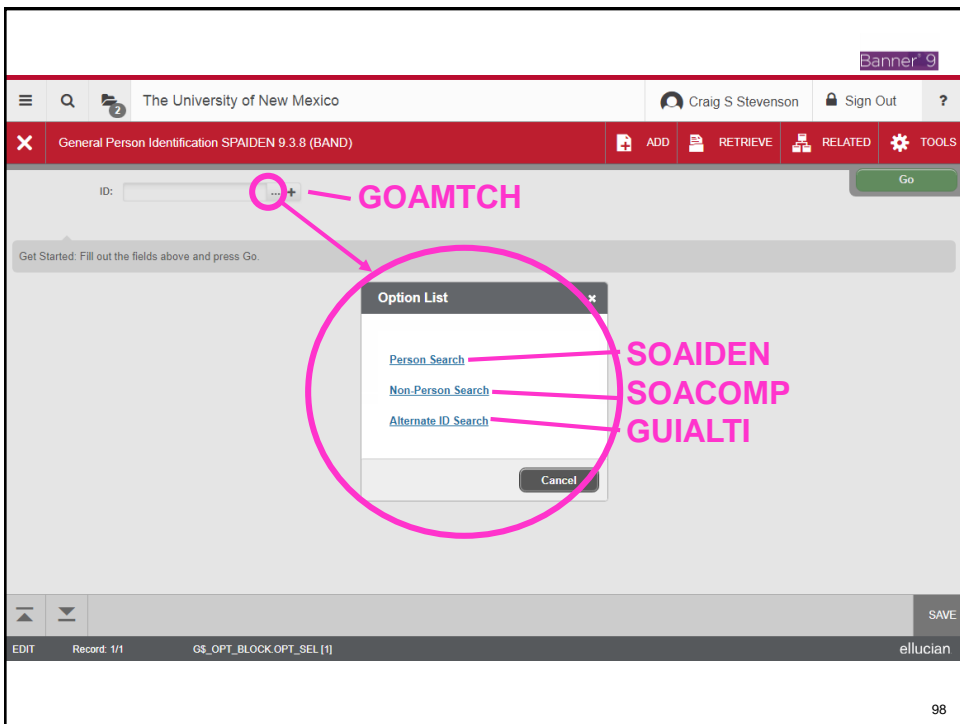
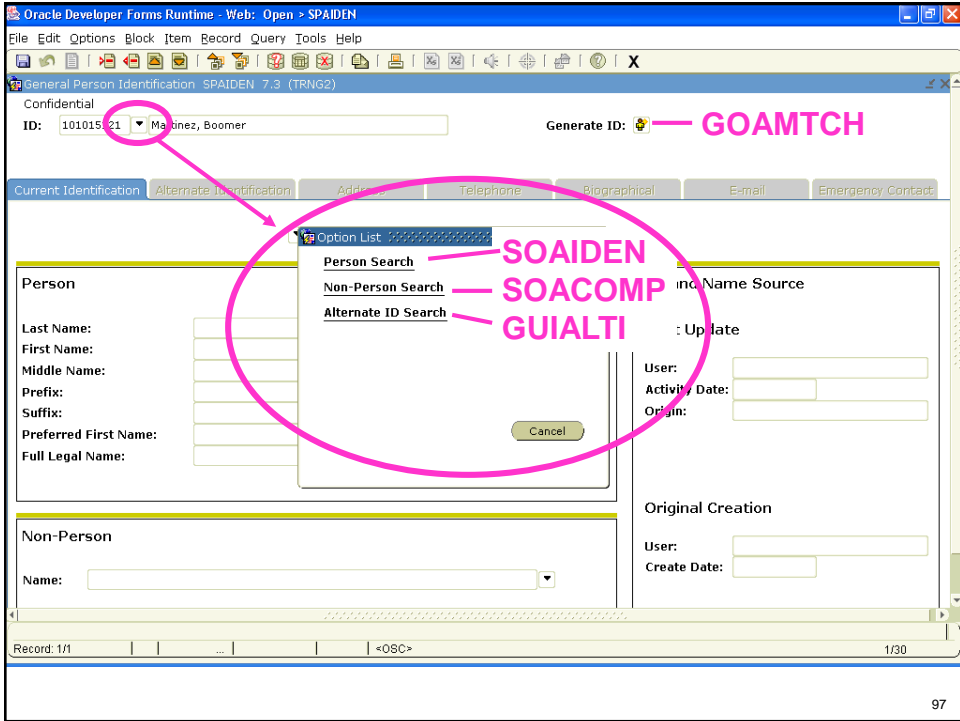
Where am I? Banner breadcrumbs

Banner 9

- Banner 9 does not have breadcrumbs
- Instead we have: The University of New Mexico
- Click on it
- Get:

| |
|---|
| Test Score Information Form (SOATEST) |
| Person Comment Form (SPACMNT) |
| General Person Identification (SPAIDEN) |
| General Search (GUISRCH) |
| SSN/SIN/TIN History (GUITINH) |

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SOAIDEN

Banner 9

The University of New Mexico
Craig S Stevenson Sign Out ?

✕ Person Search Form SOAIDEN 9.3.5 (BAND)
 ADD
RETRIEVE
RELATED
TOOLS
1

PERSON SEARCH ✓ Enter a query, press F8 to execute.

Add Another Field ...

Clear All Go

Case Insensitive Query Case Sensitive Query

SEA...
Record: 1/1
SPRIDEN.SPRIDEN_ID [1]
CANCEL SELECT

ellucian
101

Setup

Banner 9

The University of New Mexico
Craig S Stevenson Sign Out ?

✕ Person Search Form SOAIDEN 9.3.5 (BAND)
 ADD
RETRIEVE
RELATED
TOOLS

PERSON SEARCH Insert Delete Copy Filter

Last Name ▾ Equals ▾

Add Another Field ...

Clear All Go

Case Insensitive Query Case Sensitive Query

SEA...
Record: 1/1
SPRIDEN.SPRIDEN_ID [1]
CANCEL SELECT

ellucian
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Understanding SOAIDEN Results

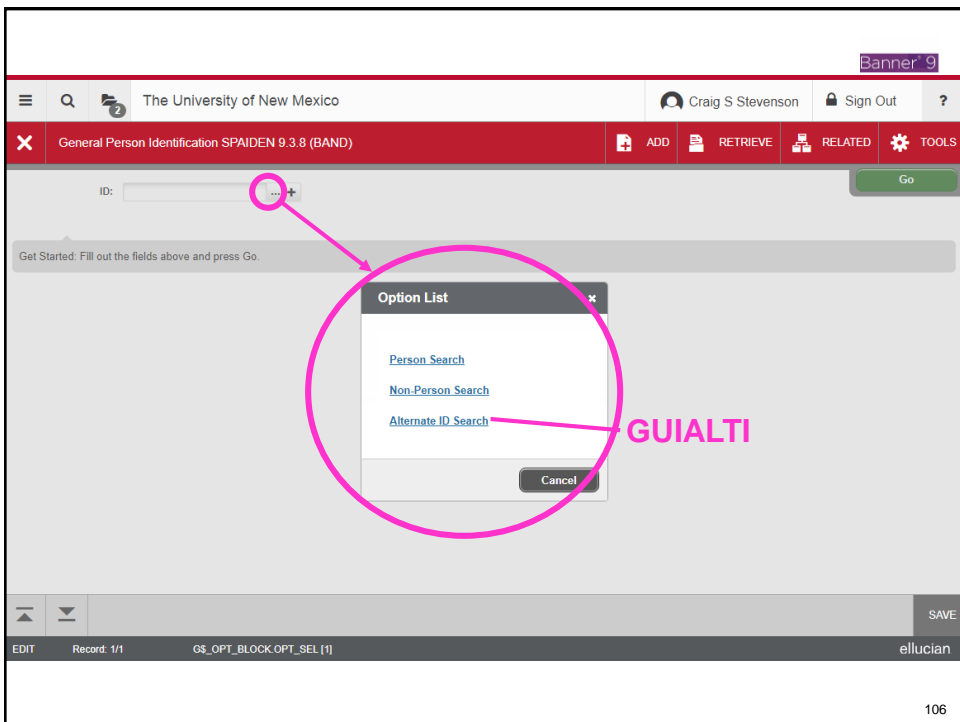
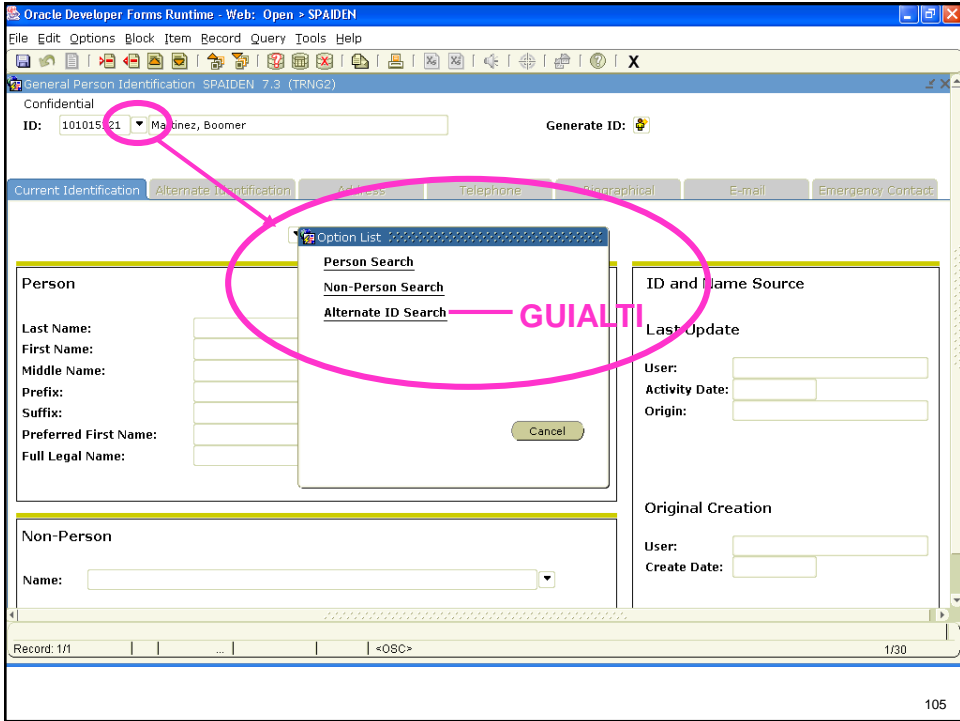
| ID | Last Name | First Name | Middle Name | Birth Date | Change Indicator Type |
|----|-----------|------------|-------------|------------|----------------------------------|
| | | | | | Current Name |
| | | | | | Name Change |
| | | | | | ID Change PER-SEQ-NUM |
| | | | | | ID Change Web App ID |
| | | | | | Name Change Only |
| | | | | | Blank Ind. 10 individuals listed |

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Understanding SOAIDEN Results Banner 9

| ID | Last Name | First Name | Middle Name | Birth Date | Change Indicator | Prefix | Suffix |
|----|-----------|------------|-------------|------------|------------------|--------|--------|
| | | | | | | | |

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Key search form #1: GUIALTI

| SSN/SIN/TIN | ID | Entity | Last Name | First Name | Middle Name | Birthdate | Change |
|-------------|----|--------|-----------|------------|-------------|-----------|--------|
| | | | | | | | |

Annotations on the right side of the table:

- Arrow pointing to the 'Change' column header: Name Change Only
- Arrow pointing to the 'Change' column content: Name Change

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Setup

Banner 9

The University of New Mexico | Craig S Stevenson | Sign Out

Person Search Form SOAIDEN 9.3.5 (BAND) | ADD | RETRIEVE | RELATED | TOOLS

PERSON SEARCH | Insert | Delete | Copy | Filter

Last Name | Starts With | mingol

Add Another Field ...

Clear All | Go

Case Insensitive Query Case Sensitive Query

SEA... Record: 1/1 SPRIDEN.SPRIDEN_ID [1] | CANCEL | SELECT | ellucian

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Key search form #1: SOAIDEN

| ID | Last Name | First Name | Middle Name | Birth Date | Change Indicator | Prefix | Suffix |
|----|-----------|------------|-------------|------------|------------------|--------|--------|
|----|-----------|------------|-------------|------------|------------------|--------|--------|

Searching: Wildcards

% stands for **zero, one, or many** letters or numbers.

Grif% in the last name field returns:

Grife, Griffin, Griffee, Griffith, and Griffin-Myers

M%c%d% in the last name field returns:

McBride, Mc Leod, McDuff, Mc Duff and MacDuff

Gon%ale% in the last name field returns:

Gonalez, Gonazales, Gonsales, Gonzalez and Gonsalez

_ (underscore) stands for **exactly one** letter or number.

Anders_n in the last name field return:

Anderson and Andersen

Note: wildcards are not used in the form GOAMTCH.

Why we use wildcards

| "Mallory" | "Christina" | "Jacquelyn" | "Megan" | "Cheryl" |
|-----------|-------------|-------------|---------|-------------|
| mal%r% | %r%st%na | ja%!n% | M%g%n% | C or sh%r%i |
| Malarie | Christeena | Jacauelyne | Maegan | Charaell |
| Malary | Christina | Jacqueline | Maeghan | Chariell |
| Malerie | Christyna | Jackeline | Maeghin | Charryl |
| Mallari | Chrystena | Jackelyn | Maeghin | Charyl |
| Mallary | Chrystina | Jackelyne | Magen | Cherrell |
| Malleri | Chrystyna | Jackolean | Magin | Cheryal |
| Mallery | Cristina | Jackolyn | Maygan | Cheryl |
| Mallore | Crystina | Jackqueline | Meagan | Cheryll |
| Mallori | Khrystina | Jackquelyn | Meaghan | Sharell |
| Mallorie | Khrystyna | Jacoline | Megan | Sharol |
| Mallory | Kristina | Jacqueline | Megann | Sharyl |
| Maloree | Krysteena | Jacqueline | Megean | Sherele |
| Malorey | Krystina | Jacquelin | Meggain | Sherill |
| Malori | Krystyna | Jacqueline | Meggan | Sherille |
| Malorie | | Jacqueline | Meggan | Sherill |
| Malory | | Jacquelyn | Meghan | Sherrell |
| | | Jacquelyne | Meghann | Sherriell |
| | | Jacquelynn | Meghin | Sheryl |
| | | Jacquelynne | Meghin | Sheryl |
| | | Jacquiline | Megyn | Sheryle |
| | | Jacquilyn | Mehgan | Sheryll |
| | | Jacquiline | | Shirelle |
| | | Jaquelin | | |
| | | Jaqueline | | |

111

How to search on GUIALTI

Oracle Developer Forms Runtime - Web: Open > SPAIDEN - GUIALTI

File Edit Options Block Item Record **Query Tools** Help

SSN/SIN Alternate ID Search Form GUIALTI 7.0 (TRNG2)

SSN/SIN/TIN ID Entity Last Name

Case Insensitive Query Case Sensitive Query

Enter a query, press F8 to execute, Ctrl+Q to cancel.

Record: 44 | Enter: Ou | | <OSC>

Query Tools

- Enter
- Execute
- Last Criteria
- Cancel
- Count Hits
- Fetch Next Set

F7 F8 Ctrl-Q

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How to search on SOAIDEN

Banner 9

F7: Filter, go to here
F8: Execute, Go button here
Ctrl-Q: Close form Cancel Button
Alt-PageUp: prior section
Alt-PageDown: next section

How to select a record on GUIALTI

| SSN/SIN/TIN | ID | Entity | Last Name | First Name | Middle Name | Birthdate | Change |
|--------------------|----|--------|-----------|------------|-------------|-----------|--------|
| [Empty table body] | | | | | | | |

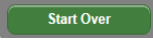
- Always start from SPAIDEN/PPAIDEN when searching
- Double-click the Banner ID of the record you want loaded into SPAIDEN
- If that is not the right record, you must return to GUIALTI, perform the search again, and select another record to review
- To get back to GUIALTI, click the Rollback icon  in SPAIDEN to get back to the key block

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How to select a record

Banner 9



- Always start from SPAIDEN/PPAIDEN when searching
- Pick a record you want to see. Click 'Select' button and the record you want loaded into SPAIDEN
- Click  in SPAIDEN to get back to the key block and from there return to search form.

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Employee Life

Let's Log into Banner

- Sign on to your computer.
- Go to my.unm.edu and log in
- Click on the Employee Life tab
- Click on [Banner training DB \(BANTR\)](#)
- SAY NO TO REQUESTS TO UPDATE JAVA!
- Log in using the username and password assigned to you by the instructor
- **Maximize the browser!**
- Go to SPAIDEN or PPAIDEN
- Use the Option List to go to GUIALTI

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GUIALTI Practice

1. Search for Last Name = Mingo
2. Search for Last Name = Mingo%
3. Search for Last Name = M%ngo
4. Search for Last Name = Mingo and First Name = d%
5. Search for Last Name = Mingo and DOB = %1965
6. Find the David Mingo who lives at 8883 W Cross Pl Littleton CO
 1. Select record by double-clicking on SSN or Banner ID
 2. Get back to GUIALTI by clicking Rollback

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GUIALTI Summary

- **Pros**
 - All fields are optional and can be left blank including Last Name. Women’s last names change and if you have other information (First Name, Middle Initial, Birth date) you can perform a good search.
 - **Very powerful form. Can use wild cards in all of the fields**
 - Can select Case Insensitive Query
- **Cons**
 - Lists all ID records for each match, not just the current ID.
 - Can not change the sort order of the matches – last name, first name.
 - Must re-enter all data after each search.
 - Limited information displayed.

| SSN | Last Name | First Name | Birth Date | Returns |
|---------|-----------|------------|------------|---|
| | M%ald | C% | | MacDonald, McDonald, Mc Donald, McDannald, McDougald, Mcdonald with first name starting with C |
| | M%donald | C% | %1984 | MacDonald, McDonald, Mcdonald, Mc Donald with first name starting with C that has a birth year of 1984. |
| | | C% | %MAY-198% | All people with first name starting with C who where born in May in all of the 1980s. |
| %765432 | | Chris% | %MAY-198% | All people with first name starting with Chris who where born in May in all of the 1980s who’s SSN ends with 765432 |

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Oracle Developer Forms Runtime - Web: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification: SPAIDEN 8.2 (BANTR)

ID: Generate ID: — GOAMTCH

Current Identification | Alternate Identification | Address | Telephone | Biographical | E-mail | Emergency Contact | Additional Identification

Person Override Name Parse

Last Name:

First Name:

Middle Name:

Prefix:

Suffix:

Preferred First Name:

Full Legal Name:

Non-Person

Name:

ID and Name Source

Last Update

User:

Activity Date:

Origin:

Original Creation

User:

Create Date:

ID number, LIST for person, COUNT HITS for non-person, DUP ITEM to generate ID, DUPLICATE RECORD for Alternate ID look-up.
Record: 1/1 | ... | *OSC*

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Banner 9

The University of New Mexico

Craig S Stevenson Sign Out ?

General Person Identification SPAIDEN 9.3.8 (BAND)

ADD RETRIEVE RELATED TOOLS

ID: ... + — GOAMTCH

Go

Get Started: Fill out the fields above and press Go.

EDIT Record: 1/1 KEY_BLOCK.ID [1] ellucian

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Key search form #2: GOAMTCH

Common Matching Entry GOAMTCH 8.5.1 (INTG) View Comments

ID: Matching Source:

Data Entry

Last Name:

First Name:

Middle Name:

Address Type:

Street Line 1:

Street Line 2:

Street Line 3:

City:

US State:

ZIP or Postal Code: Override

NM County:

Foreign Nation:

Non-Person Name:

SSN/SIN/TIN:

Birth Date: Day: Month: Year: Gender:

Telephone Type:

Telephone:

E-mail Type:

E-mail:

Additional ID Type:

Additional ID:

Duplicate Check
Details
View Comments

Select ID
Update ID
Create New

| Match | Potential Matches | | | Matched Address | Telephone | E-mail |
|--------------------------------|-------------------|--------|--|----------------------|----------------------|----------------------|
| ID | Name | | | | | |
| SSN/SIN/TIN | Birth Date | Gender | | | | |
| Additional ID | | | | | | |
| Clear and Return to Data Entry | | | | All Addresses | All Telephones | All E-mails |
| Matching Rule Sets | | | | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| No Matches | | | | | | 121 |

Key search form #2: GOAMTCH

Banner 9

The University of New Mexico Craig S Stevenson Sign Out ?

Common Matching Entry GOAMTCH 9.3.5 (BAND) ADD RETRIEVE RELATED TOOLS

ID: Matching Source: Go

Priorities: 1.SSN/NAME Req'd; 2. Name,StreetLine1 Req'd

View Comments:

Get Started: Fill out the fields above and press Go.

EDIT
Record: 1/1
KEY_BLOCK.EXECUTE_BTN [1]
ellucian

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Key search form #2: GOAMTCH

The University of New Mexico | Craig S Stevenson | Sign Out

Common Matching Entry GOAMTCH 9.3.5 (BAND) | ADD | RETRIEVE | RELATED | TOOLS

ID: GENERATED Matching Source: ***ONLINE_MATCH_RULE Priorities: 1.SSN/NAME Req'd; 2. Name.StreetLine1 Req'd...

DATA ENTRY | Insert | Delete | Copy | Filter

| | | |
|--------------------|----------------------|--|
| Last Name | <input type="text"/> | <input type="checkbox"/> Skip Address Verify |
| First Name | <input type="text"/> | Nation <input type="text"/> |
| Middle Name | <input type="text"/> | Non-Person Name <input type="text"/> |
| Address Type | MA ... Mailing | SSN/SIN/TIN <input type="text"/> |
| Street Line 1 | <input type="text"/> | Birth Date Day <input type="text"/> Month <input type="text"/> Year <input type="text"/> |
| Street Line 2 | <input type="text"/> | Gender <input type="text"/> |
| Street Line 3 | <input type="text"/> | Telephone Type MA ... Mailing |
| City | <input type="text"/> | Telephone <input type="text"/> |
| State or Province | <input type="text"/> | E-mail Type UNM ... @unm.edu email address |
| ZIP or Postal Code | <input type="text"/> | E-mail <input type="text"/> |
| County | <input type="text"/> | Additional ID Type <input type="text"/> |

SAVE | ellucian | 123

Key search form #2: GOAMTCH

The University of New Mexico | Craig S Stevenson | Sign Out

Common Matching Entry GOAMTCH 9.3.5 (BAND) | ADD | RETRIEVE | RELATED | TOOLS

ID: GENERATED Matching Source: ***ONLINE_MATCH_RULE Priorities: 1.SSN/NAME Req'd; 2. Name.StreetLine1 Req'd...

Address Verified Additional ID

Duplicate Check

Select ID

Details

Update ID

View Comments

Create New

Match Potential Matches

MATCH | Insert | Delete | Copy | Filter

| | | | |
|---------------|----------------------|-----------------|----------------------|
| ID | <input type="text"/> | Matched Address | <input type="text"/> |
| Name | <input type="text"/> | Telephone | <input type="text"/> |
| SSN/SIN/TIN | <input type="text"/> | E-mail | <input type="text"/> |
| Birth Date | <input type="text"/> | Additional ID | <input type="text"/> |
| Gender | N | All Addresses | <input type="text"/> |
| Street Line 1 | <input type="text"/> | All Telephones | <input type="text"/> |

SAVE | ellucian | 124

Key search form #2: GOAMTCH

The University of New Mexico | Craig S Stevenson | Sign Out

Common Matching Entry GOAMTCH 9.3.5 (BAND) | ADD | RETRIEVE | RELATED | TOOLS

ID: GENERATED Matching Source: ***ONLINE_MATCH_RULE Priorities: 1.SSN/NAME Req'd; 2.Name.StreetLine1 Req'd...

Match Potential Matches

| ID | Matched Address |
|-----------------|--------------------|
| Name | Telephone |
| SSN/SIN/TIN | E-mail |
| Birth Date | Additional ID |
| Gender | All Addresses |
| Street Line 1 | All Telephones |
| Street Line 2 | All E-mails |
| Street Line 3 | Matching Rule Sets |
| Matched Address | No Matches |

Clear and Return to Data Entry

EDIT Record: 1/1 GOTCMM LAST_NAME [1] ellucian 125

Key search form #2: GOAMTCH

Common Matching Entry GOAMTCH 8.5.1 (NTG)

ID: GENERATED Matching Source: ***ONLINE_MATCH_RULE Priorities: 1.SSN/NAME Req'd; 2.Name.StreetLine1 Req'd...

Data Entry

Last Name: Test
 First Name: General
 Middle Name:
 Address Type: MA Mailing
 Street Line 1:
 Street Line 2:
 Street Line 3:
 City:
 US State:
 ZIP or Postal Code:
 NM County:
 Foreign Nation:

Non-Person Name:
 SSN/SIN/TIN:
 Birth Date: Day: Month: Year: Gender: Null
 Telephone Type: MA Mailing
 Telephone:
 E-mail Type: ALTN Alternate (non @unm.edu) email address
 E-mail:
 Additional ID Type:
 Additional ID:

Duplicate Check Select ID Details Update ID View Comments Create New

| ID | Name | SSN/SIN/TIN | Birth Date | Gender | Matched or Hierarchical Address | Telephone | E-mail |
|-----------|------------------|-------------|-------------|--------|---|----------------|-------------------------|
| 101116431 | Test, General | 889458644 | 03-MAR-1993 | M | MA=305 General Marshall St NE Albuquerque N | No Matches | ALTN=gttest@hotmail.com |
| 101116432 | Test, General L. | 743875734 | 07-JUL-1947 | M | No Matching or Hierarchical Address found | MA=505 2233122 | No Matches |

Additional ID:
 Clear and Return to Data Entry All Addresses All Telephones All E-mails

Matching Rule Sets
 1=Primary Name Match,SSN/SIN/TIN NULL Match,Gender NULL Match,Birth Day NULL Match,Birth Month NULL Match,Birth Year NULL Match,Address NULL Match
 2=Primary Name Match,SSN/SIN/TIN NULL Match,Birth Year Missing,E-mail Missing,Additional ID Missing

Key search form #2: GOAMTCH

The University of New Mexico | Craig S Stevenson | Sign Out

Common Matching Entry GOAMTCH 9.3.5 (BAND) | ADD | RETRIEVE | RELATED | TOOLS

D: GENERATED | Matching Source: **ONLINE_MATCH_RULE | Go

View Comments: [icon]

Get Started: Fill out the fields above and press Go.

EDIT | Record: 1/1 | KEY_BLOCK.EXECUTE_BTN [1] | ellucian | 127

Key search form #2: GOAMTCH

Last Name: general

First Name: test

Middle Name: [input]

Address Type: MA ... Mailing

Street Line 1: [input]

Street Line 2: [input]

Street Line 3: [input]

City: [input]

State or Province: [input]

ZIP or Postal Code: [input]

County: [input]

Address Verified

Skip Address Verify

Nation: [input]

Non-Person Name: [input]

SSN/SIN/TIN: [input]

Birth Date: Day [input] Month [input] Year [input]

Gender: Null [input]

Telephone Type: MA ... Mailing

Telephone: [input]

E-mail Type: UNM ... @unm.edu email address

E-mail: [input]

Additional ID Type: [input]

Additional ID: [input]

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Key search form #2: GOAMTCH

Duplicate Check

Select ID

Details

Update ID

View Comments

Create New

Match **Potential Matches 2**

| ID | Name | SSN/SIN/TIN | Birth Date | Gender | Matched or Hierarchical Address | Telephone | E-mail |
|-----------|------------------|-------------|------------|--------|--|----------------|------------|
| 101282206 | Test, General P. | 393393993 | 08/08/1988 | F | MA=500 Central Ave SW Albuquerque NM 8710... | MA=505 5551234 | No Matches |
| 101685015 | Test, General P. | | | | No Matching or Hierarchical Address found | No Matches | No Matches |

1 of 1 | 10 Per Page | Record 1 of 2

Match

Additional ID

Matching Rule Sets: 1=Primary Transposed Name Match,SSN/SIN/TIN Missing,Gender NULL Match,Birth Day NULL Match,Birth Month NULL Match,Birth Year NULL

All Addresses

All Telephones

All E-mails

Clear and Return to Data Entry

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GOAMTCH Differences

- Must fill in the matching source before you can search
- Requires last name
- Performs parallel search with SSN
- No wildcards allowed BUT...
 - ...Treats all data entered as if it had % at the end
 - Example: Last name “Mingo” will bring back hyphenated names, as if the search had been “Mingo%”
- Uses nicknames table
- Shows lots of information about each record, don't have to go back and forth to SPAIDEN to see address, phone, etc.

GOAMTCH Practice

- Enter your first and last name
 - Returns all records with that current or previous name
- Add just part of your first and last name
 - Returns all the names that start with the letters you entered
- Add your SSN
 - Performs 2 independent searches, one on name and one SSN.
- Highlight a row and click on address, phone and email drop down.
- Highlight a row and click on Details
 - GUISYST: what Banner systems is this person in.
 - SPAIDEN: Examine Data, can look at Additional ID Tab.
 - SOAHSCH: examine what High School the person attended.
 - SOATEST: test scores (GRE, SAT, ACT, etc.)

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GOAMTCH Summary

- Pros
 - Can repeatedly search by adding or removing data without having to re-type everything you have already entered.
 - Can examine addresses, telephone numbers and email by highlighting a Potential Match and using the drop down boxes at the bottom of the form.
 - Can examine different data by highlighting a Potential Match and clicking on the Details button in the middle of the form.
 - Searches name history and returns previous names marked with an *.
 - Uses the nickname table. (Ed returns Ed, Eddie, Edward, etc)
 - Displays only one record for each potential match, so it is easier to find a match.
 - The number of potential matches is displayed on the Potential Matches Tab.
- Cons
 - Can not use wild cards– all wild cards are stripped out and all letters capitalized before the matching is done.
 - Remember to use the scroll bar at the right of the Potential Matches Block.

| Last Name | First Name | Returns |
|-----------|------------|---|
| M%don% | C% | No Matched. Is searching for last name MDON.... |
| MacDon | Chris | All people with last name of MacDonald, Macdonald, MacDonnelly and a first name starting with Chris or an equivalent nick name. |
| Mcdonald | Chris | Potential Matches on 12 other McDonald, Mcdonalds, with a first name starting with Chris or an equivalent nick name. |

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Search Tip: Broaden your search

- Too much information may not match exactly – try less information per search, and different combinations (name and SSN, name and DOB, name alone, etc.)
- Example: On GOAMTCH, perform the following searches and note how many potential matches result from each:
 - Last name Ruiz, first name Jac
 - Last name Ruiz, first name Jacob
 - Last name Ruiz, first name Jacob, mi D

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Search Tip: Examine your data

What data do you have?

- First Name
- Last Name
- DOB
- SSN
- Address, Zip, Phone
- Email

Which search form is best for which data items?

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Search Tip: Which Form?

GUIALTI: *no last name required, able to use wild cards. See lots of records at once, search on last name, first name, DOB, SSN*

GOAMTCH: *can examine all of these fields at once, performs SSN search in parallel. First name, last name, mi, SSN, address, phone number, email, high school and other 'details'. NO WILD CARDS!*

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What to search on

Change the search data

NAME:

- First 3 letters of both names
- Add middle initial
- Wild cards before and after names
- First name and DOB only on GUIALTI

SSN:

- On GUIALTI, always search without the SSN
- Always search with SSN on GOAMTCH at least once
- Search on partial SSN (505, 585, 525) on GUIALTI for typos

DOB:

- Partial DOB and names on GUIALTI

Email

- Use wild cards

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Search Practice Exercises

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Searching – How much, how long?

- UNTIL YOU ARE SURE
- If you are not sure, DON'T DO IT!
- Search at least 3 different ways. Use different forms, wildcards, and broader searches to confirm your results

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Be Sure You Have The Right Person!

- Have them confirm their address and phone number
- Have them tell you their date of birth
- Have them tell you their email address or emergency contact information
- If changes are needed, send them...
 - To LoboWeb to update their address, phone number, email address, and Emergency Contact(s)
 - To the Registrar's Office (for students) or appropriate HR office (for staff and faculty - HR, Faculty Contracts, Student Employment, OGS, etc.) to update their date of birth

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Other Helpful Forms

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GUITINH – SSN History

SSN/SIN/TIN History GUITINH 8.0 (DEVL)

ID: General Person Test SSN/SIN/TIN:

Entity Selection

| ID | Entity | Name | Current SSN/SIN/TIN | Birth Date |
|--------------|--------|---------------------|---------------------|-------------|
| => 101282206 | P | General Person Test | 987654321 | 26-SEP-1981 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

History

| SSN/SIN/TIN Changed From | SSN/SIN/TIN Changed To | Changed By | Date Changed | Time Changed |
|--------------------------|------------------------|------------|--------------|--------------|
| 123123412 | 987654321 | JKGREEN | 18-NOV-2010 | 15:09:36 |
| 393393993 | 123123412 | JKGREEN | 10-NOV-2010 | 13:06:57 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

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GUITINH – SSN History

Banner 9

The University of New Mexico Craig S Stevenson Sign Out ?

SSN/SIN/TIN History GUITINH 9.3.3 (BAND) ADD RETRIEVE RELATED TOOLS 1

ID: 109070907 Lucy E Lobo SSN/SIN/TIN: At last record.

ENTITY SELECTION

| ID | Entity | Name | Current SSN/SIN/TIN | Birth Date |
|-----------|--------|-------------|---------------------|------------|
| 109070907 | P | Lucy E Lobo | 000907090 | 04/04/1889 |

1 of 1 Per Page Record 1 of 1

HISTORY

| SSN/SIN/TIN Changed From | SSN/SIN/TIN Changed To | Time Changed |
|--------------------------|------------------------|--------------|
| 525432341 | 000907090 | 09:39:34 |

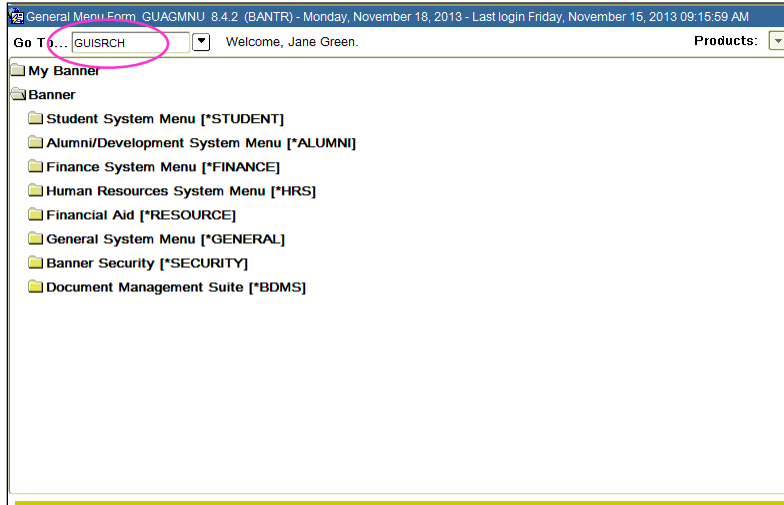
1 of 1 Per Page Record 1 of 1

EDIT Record: 1/1 SPRIDEN SPRIDEN_ID [1] CANCEL SELECT ellucian

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GUISRCH: How to access

Type GUISRCH in the Go To Box on the main menu page.



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GUISRCH: How to search

The screenshot shows the "General Search GUISRCH 8.4 (DEVL)" interface. At the top, there are search criteria fields: "Additional ID", "E-mail", "Country Code", "Area Code", and "Phone Number". Below these fields is a text box with the instruction: "Enter one search criteria (Alternate Id,E-Mail,Telephone) and press Next Block to list matching records". The "Country Code" field is circled in pink. Below the search criteria is a table with the following columns: "ID", "First Name", "Middle Name", "Last Name", and "Birth Date". The table contains 12 empty rows for displaying search results.

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GUISRCH: How to search

Banner 9

☰
🔍 11 The University of New Mexico
👤 Craig S Stevenson
🔒 Sign Out
?

✕ General Search GUISRCH 9.3 (BAND)
📄 ADD
📄 RETRIEVE
📄 RELATED
⚙️ TOOLS

Additional ID:

Country Code:

Phone Number:

E-mail:

Area Code:

Enter one search criteria (Additional Id,E-Mail,Telephone) and press Press GO to list matching records

Get Started: Fill out the fields above and press Go.

⬆️ ⬇️
EDIT Record: 1/1 KEY_BLOCK_SRCH_ALT_ID [1]
ellucian

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GUISRCH – General Search

- Searching by using:
 - e-mail address
 - telephone number
 - additional ID (not alternate IDs)
- You can enter only one search criteria at a time
 - additional id, e-mail, or phone
- Use Next Block to execute the query.
- Searches are always case insensitive.
- If the telephone is used for searching then any null phone entry (country, area code, phone) will be assumed to be %.

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GUIRCH – ID Types (From the Additional ID Tab)

| Code | Description | Activity Date |
|------|-------------------------------|---------------|
| CNM | CNM ID (Banner ID at CNM) | 29-SEP-2009 |
| LC | Learner ID (Learning Central) | 19-APR-2011 |
| NTID | UNM NetID | 19-APR-2011 |
| UH | UNMH Employee ID | 03-OCT-2009 |
| USI | Universal Stu Id (NM PED ID) | 29-SEP-2009 |

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More Search Practice Exercises

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GP101 Agenda

- Overview of General Person and Data Access Responsibilities
- General Person Terminology and Sites - How to Get There and Log In
- General Person Forms and Content
- How to Search
- How to Report Duplicates

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How to Research and Report Duplicates



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What duplicates look like

Chris Stewart Neel
Christopher Stewart Neel

Katie A Morris
Kathryn A Morris

Angelica Munoz
Angelica Munoz – 2 SSNs

Katik Nandina
Kartik Nandina

Raymond A Morgan
Ray A Morgan

Devin I Franklin
Devin Johanna Franklin

Ben Myers
Benjamin X Nigel Myers

Rudy Moreno
Rodolfo Moreno

Lauren G Tagliaferro-Epl
Lauren G Tagliaferro Epler

Stephanie Muehle
Stefanie Muehle

Jessica S Padilla
Jessica S Hernandez

Jonathan Tibbitts
Jonathan Markus Tibbetts

Rosie Moya
Rose Alvarez Moya

Ibra Dominguez
ibrahim H Dominguez

Alondra I Beltran-Chavarr
Alondra I Beltran

Cristine Mowrey
Christine Lorraine Mowrey

Davd M McFarland
David Mendoza McFarland

Hay Le B Schmidt
Haylie B Schmidt

Victoria Leah Ortiz
Vickie Leah Ortiz

Suzy May
S Mary May

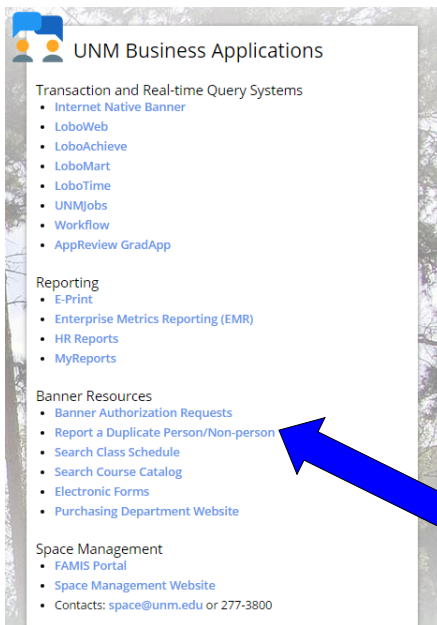
Clint McCaleb
Clinton Thomas Ralph McCaleb

Ganapathirajuvsweswara Narasimhasingarajuvarma -- Test Scores
V Narasimha Singaraju Varma Ganapathiraju -- Web Application

Ganapathirajumanikanta Varahalavenkatapatiraju -- Test Scores
Manikanta Varahala Venkatapati Raju Ganapathiraju -- Web Application

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How to report a duplicate



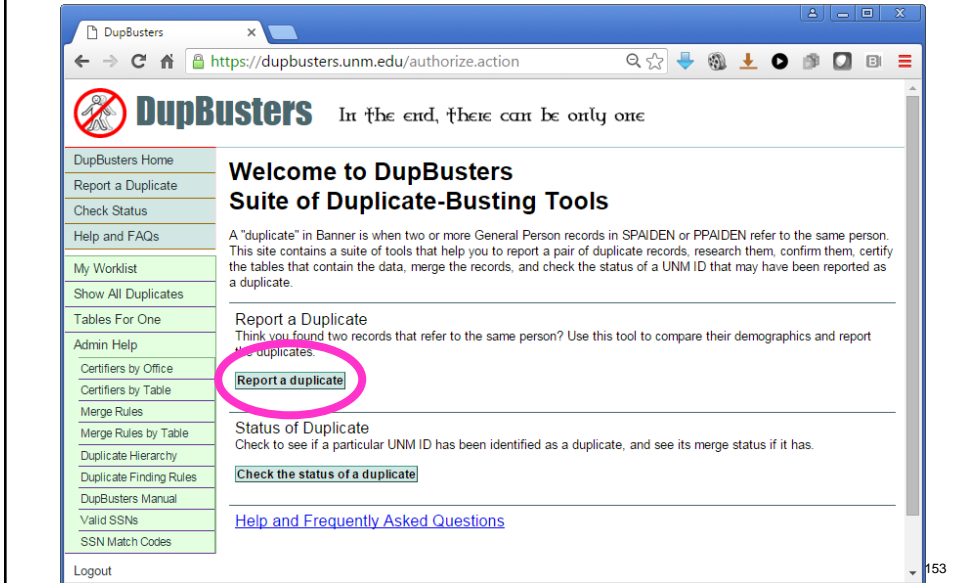
1. Go to the Employee Life tab in the myUNM portal
2. Click on **Report a Duplicate Person** in the UNM Business Applications box
3. Log in with your NetID and password if asked

Report a Duplicate Person / Non-person

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How to report a duplicate

Click on **Report a duplicate**



How to report a duplicate

- Enter the two Banner IDs
- Click Next >>



Confirm that it's a duplicate

- Compare names, SSN, date of birth (DOB), prior names

The screenshot shows the DupBusters web application interface. At the top, there is a navigation bar with tabs for Overview, Confirm, Certify, and Merge. Below this, there are sub-tabs for Confirm Pair, Compare Demographics, Compare Comments, and View Table Report. The main content area is titled "Compare Demographics for Pair #33464: Record 101739152 (Janet O De La Torre) - Record 101687464 (Janet Ornelas De La Torre)".

On the left side, there is a sidebar menu with various options such as DupBusters Home, Report a Duplicate, Check Status, Help and FAQs, My Worklist, Show All Duplicates, Tables For One, Admin Help, Certifiers by Office, Certifiers by Table, Merge Rules, Merge Rules by Table, Duplicate Hierarchy, Duplicate Finding Rules, DupBusters Manual, View SSNs, SSN Match Codes, and Logout.

The main content area is divided into two columns for comparison. The left column is labeled "General" and lists various demographic fields: LNM ID, Person Type, First Name, Middle Name, Last Name, Created On, Created By, PICM, Active Provisioning Roles, SSN, Gender, Birth Date, Ethnicity, Citizenship, and Financial Aid Application SSN Match Flag. The right column is labeled "Prior Names" and lists the name: Record 101739152 (Janet O De La Torre).

The interface is partially obscured by a large light blue rectangular area, likely representing a redaction or a placeholder for data.

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Compare existing data

- Examine addresses, email, high school, college, test scores

The screenshot shows the DupBusters web application interface, similar to the previous one. The main content area is mostly obscured by a large light blue rectangular area, likely representing a redaction or a placeholder for data. The interface elements, including the navigation bar and sidebar menu, are visible but mostly hidden behind the redaction.

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Still think it's a dup?

If after reviewing the data you still think this may be a duplicate

- Enter as much info as you have
- Click Report as Duplicate

[Click here to compare addresses and other demographic information](#)

Indicate Priority

Urgent - this duplicate requires immediate attention

Mark it Urgent if needed to be merged right away

Indicate Record to Keep

Keep Record 101274684 (Michelle K Watchman)

Keep Record 101081754 (Michelle Watchman)

Don't know which to keep

Indicate which record set to keep - if you know. If you don't, that's OK.

Comments

If Urgent priority, please describe the business or customer need or hardship.

Enter all facts about SSN, Name, DOB, Address, etc. Have you seen their SSN card? Has the person verified their DOB?

Report as Duplicate

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Note the duplicate pair

The next window will show the Duplicate pair #. Note it so you can come back and check on the status

Report Suspected Duplicate

Duplicate pair #22038 submitted at Thu Sep 27 14:28:03 MDT 2012

Submitted By:

| | |
|-------------|------------------------|
| Name: | Green, Jane Katherine |
| Department: | IT Applications (324A) |
| Email: | jkgreen@unm.edu |
| Phone: | 2201288 |

Details:

| | Record 101274684 | Record 101081754 |
|---------------------------|------------------|------------------|
| UNM ID | | |
| Person Type | | |
| First Name | | |
| Middle Name | | |
| Last Name | | |
| Created On | | |
| Created By | | |
| PIDM | | |
| Active Provisioning Roles | | |

Priority: Active - At least one record is active

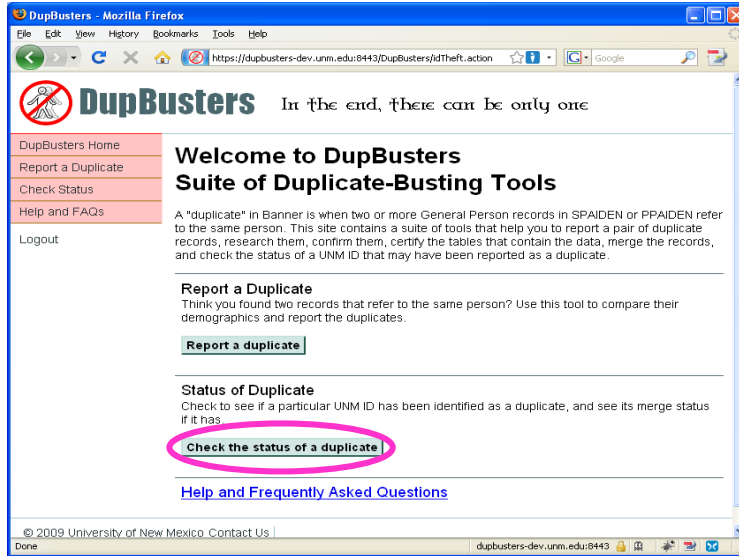
Record to Keep: Don't know which to keep

Comments:

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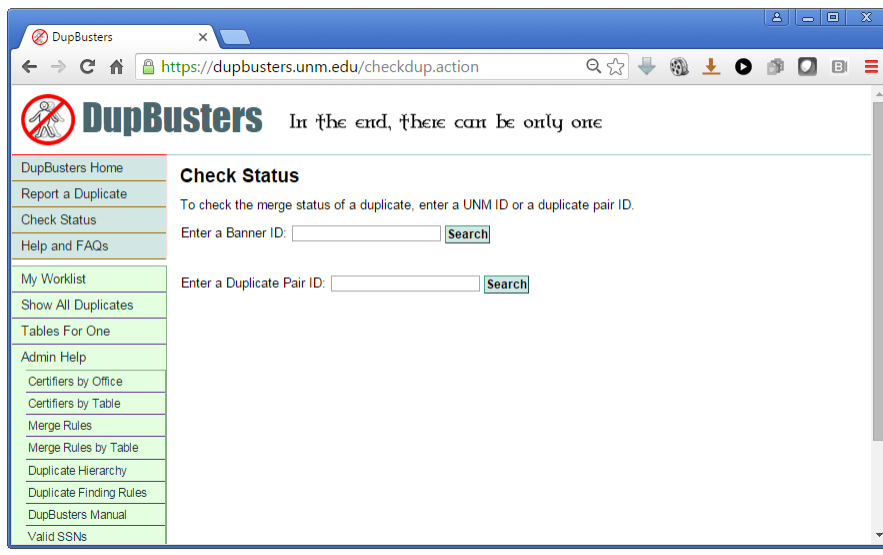
How to check the status

From the home page, click on **Check the status of a duplicate**



How to check the status

Enter the duplicate pair number, or one of the Banner IDs



How check the status of a duplicate

Current Status may be Reported, Confirmed, In certification, Certified, Merged, Failed, or Rejected

Overview Confirm Certify Merge

Overview of Pair #22038:
Record 101274684 (Michelle K Watchman) - Record 101081754 (Michelle Watchman)
Current status as of Thu Sep 27 14:32:27 MDT 2012 - **REPORTED**

| Phase | Details |
|----------------|--|
| Pair ID | 22038 -- Record 101274684 (Michelle K Watchman) - Record 101081754 (Michelle Watchman) |
| Current Status | REPORTED |
| Identified | Identified as a duplicate by JKGREEN on 9/27/12 |
| Owner Office | Financial Aid |
| Confirmed | This reported duplicate has not been confirmed. |
| Certified | This reported duplicate has not been confirmed. No certifications can occur yet. |
| Merged | This reported duplicate has not been merged. |
| Comments | |

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To see if a duplicate has been reported

Enter one of the Banner IDs you suspect of being a duplicate and click Search

Check Status
To check the merge status of a duplicate, enter a UNM ID or a duplicate pair ID.

Enter a Banner ID:

Enter a Duplicate Pair ID:

If it has been reported, it will take you to the status page. If it has not been reported before, you will see this message

 This person or company has never been reported as a duplicate.

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How duplicates are resolved

1. First, the two records are researched and it is confirmed that the two records refer to the same person (the duplicate is confirmed)
2. When the duplicate pair is confirmed, a comment is added to SPACMNT noting that they are suspected to be duplicates and instructing everyone which record to use:
 - Comment entered on ID 101759501 in SPACMNT: This record has been confirmed as a duplicate and is in the process of being merged. DO NOT ADD DATA TO IT. Use 101741462 instead. Contact gp@unm.edu with issues.
 - Comment entered on ID 101741462 in SPACMNT: This record has been confirmed as a duplicate with 101759501. ENTER ALL DATA ON THIS RECORD. Contact gp@unm.edu with issues.

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How duplicates are resolved

3. Next, every table in Banner that contains data for either record is identified, and a decision is made as to which data to keep

| Table | Column | From | To | Table Description | Merge Activities |
|---------|--------------|------|----|---|--|
| GOBSRID | GOBSRID_PIDM | X | X | IMS Sourced ID Base Table. | - Rule: Delete on merge avoiding PIN creation: - Will delete merge-from records from 1759522 to 1741478 |
| GOBTPAC | GOBTPAC_PIDM | X | X | Third Party Access Table | - Rule: Delete on merge avoiding PIN creation: - Will delete merge-from records from 1759522 to 1741478 |
| GORADID | GORADID_PIDM | X | X | This Table contains one to many additional Ids per PIDM. | - Rule: Change pidm, data origin and user in GORADID: - No conflicts found, merge-from pidm will simply be changed - Will update data origin and user for merge-from records and change pidm from 1759522 to 1741478 |
| GOREMAL | GOREMAL_PIDM | | X | Person E-mail repeating table. | |
| GORIROL | GORIROL_PIDM | X | X | GORIROL: Institution Role Table. | - Rule: Delete on merge avoiding PIN creation: - Will delete merge-from records from 1759522 to 1741478 |
| GORPAUD | GORPAUD_PIDM | X | X | Third Party Access Audit Table | - Rule: Change Pidm: - Will change pidm from 1759522 to 1741478 |
| GORPRAC | GORPRAC_PIDM | | X | Person Race Table. | |
| GURHLOG | GURHLOG_PIDM | | X | Table to contain history records for each occurrence of a given column change to table SPBPERS. | |
| GURMAIL | GURMAIL_PIDM | | X | Mail Table | |
| GZBISON | GZBISON_PIDM | | X | | |
| GZBPERS | GZBPERS_PIDM | X | X | | - Rule: Change Pidm |

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How duplicates are resolved

4. The data steward office for every affected table must review, update, and certify the data in their tables.
5. The General Person team then reviews, updates, and certifies data in the General Person tables.
6. Once every office has reviewed, updated, and certified the data, the two records are merged together

Moral of the story: Many hours of effort go into fixing a duplicate. It is much easier to be careful and **NOT CREATE ANY!!!**

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Overall Review

- Make sure you have the right person
- Search forms:
GUIALTI, GOAMTCH
- Search 3 times, use wildcards, broaden search, BE SURE!



YOU are responsible for data quality



YOU are responsible for data security



WE are here to help: gp@unm.edu

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How to request GP access

- If you pass the test with 80% you will get GP access
- Go to BAR to request access:
bar.unm.edu
 - GP Inquiry Role 1
 - GP Inquiry Role 2
 - GP Update Role 1
 - GP Update Role 2

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Contacts

All General Person questions:
gp@unm.edu

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