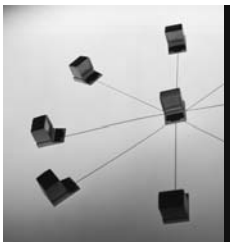
General Person Record (View Only)

Banner 8 User Guide

January 2011



REGISTRY SYSTEMS

General Person Record (View Only)

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Refer to this tutorial to learn how to view and navigate through Person data in Banner. This tutorial does not cover the creating or amending of Person records.

Banner forms:

FORM	FUNCTION
SPAIDEN	**General Person Identification Form** Used to store applicant's ID, name and address details
SOAIDEN	**Person Search Form** Used to search for a person, or non-person

1. THE GENERAL PERSON RECORD

The General Person Record in Banner is held on the form **SPAIDEN**. It is the starting point for all types of Banner Person records – Recruits, Applicants, Students and Staff in Banner will all have a General Person Record.

1.1. Go to **SPAIDEN** (Figure 1).

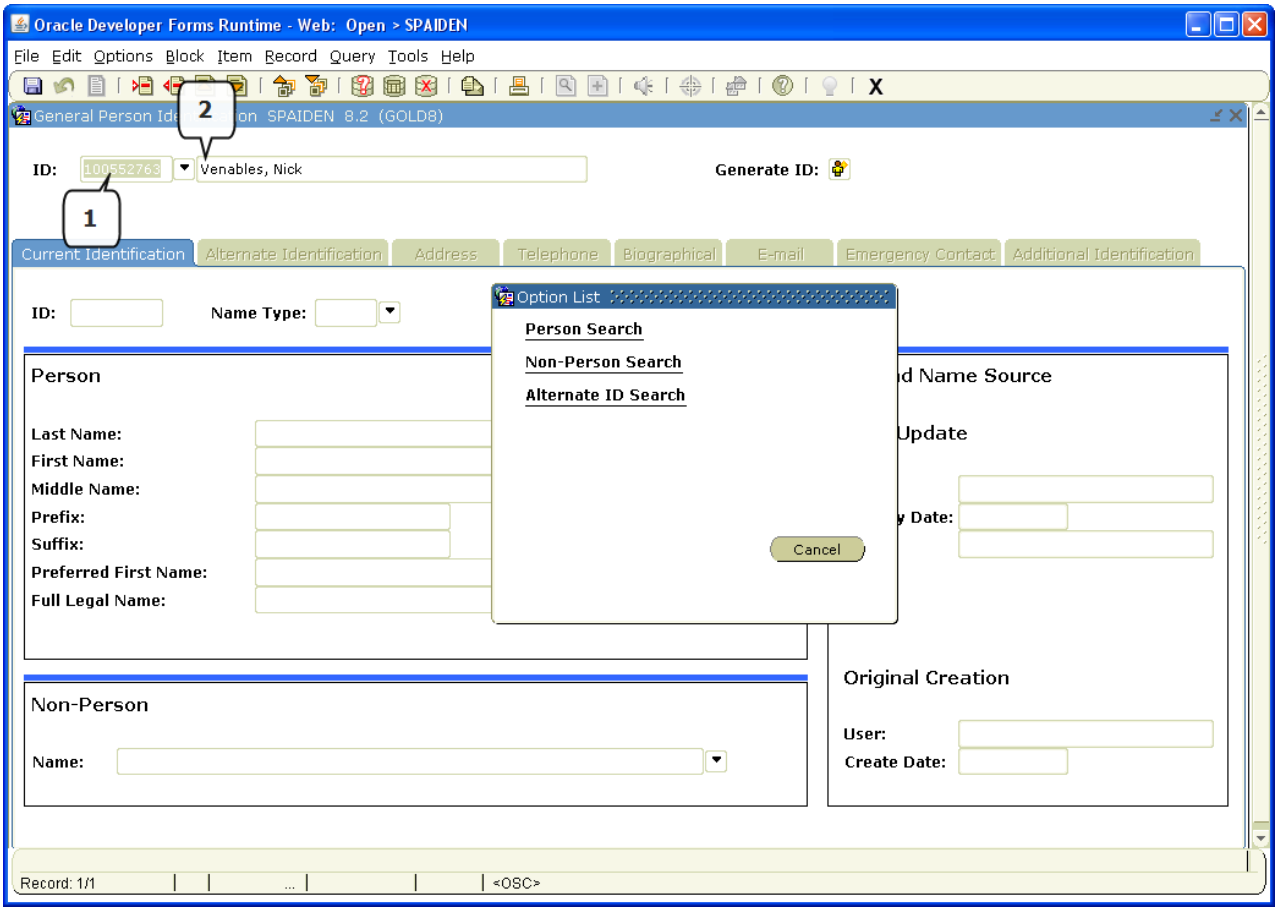

Figure 1

1.2. If you know the Banner ID for the Person (always a 9-digit number that begins with 100) you can enter it directly into the *ID* field (Figure 1, Box 1) and the Person's name will automatically be populated in the *Name* field (Figure 1, Box 2).

1.3. If you do not know the Banner ID, you can enter their name into the *Name* field (Figure 1, Box 2) in the format *Last Name, First Name* and hit Return. If there is only one match in Banner for that name, the Person will be found and the *ID* field populated with their Banner ID. If there are multiple matches for the name combination, you may be presented with a pop-up window (Figure 2).

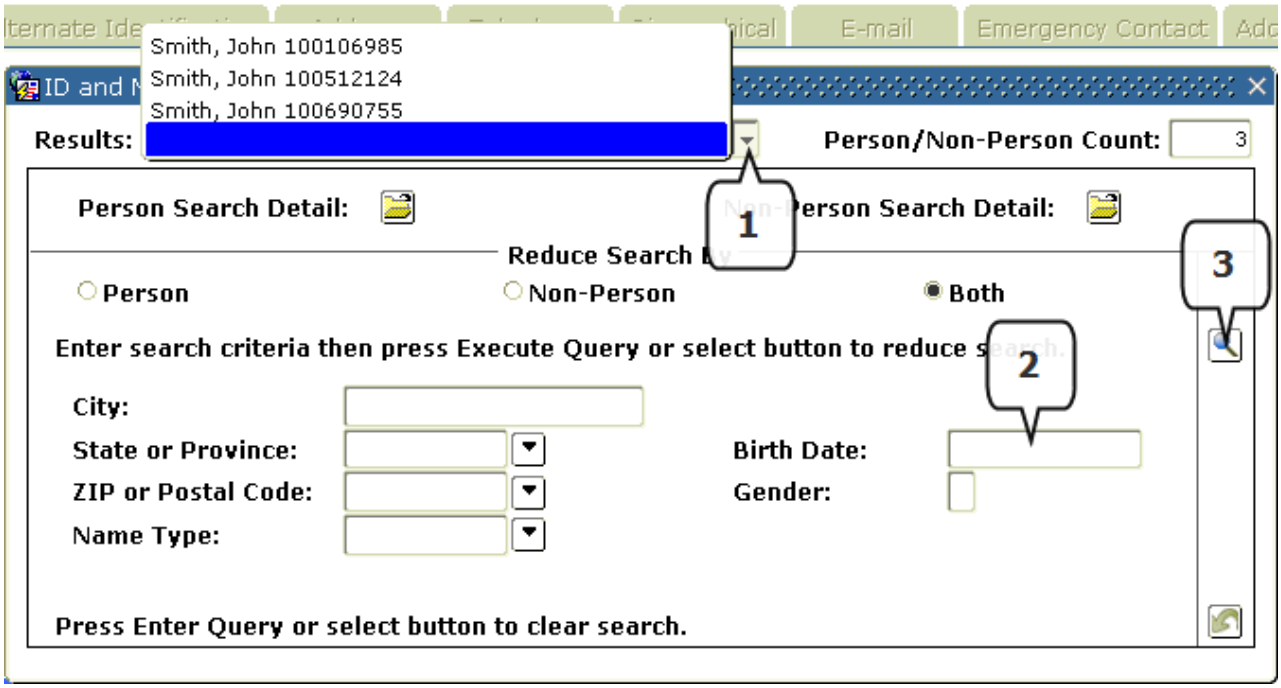

Figure 2

1.4. Click the drop-down menu (Figure 2, Box 1) to see a list of matches to select from. If the Person you want is listed, click them to select – to narrow the search, enter a *Birth Date* (Figure 2, Box 2) and click the magnifying glass icon (Figure 2, Box 3).

1.5. If you do not know the full name of the Person you wish to search for, you can perform a Custom Search using the search query form **SOAIDEN**. Click the drop-down arrow next to the *ID* field (Figure 3, Box 1) to call up the Option List (Figure 3, Box 2) and click **Person Search**.

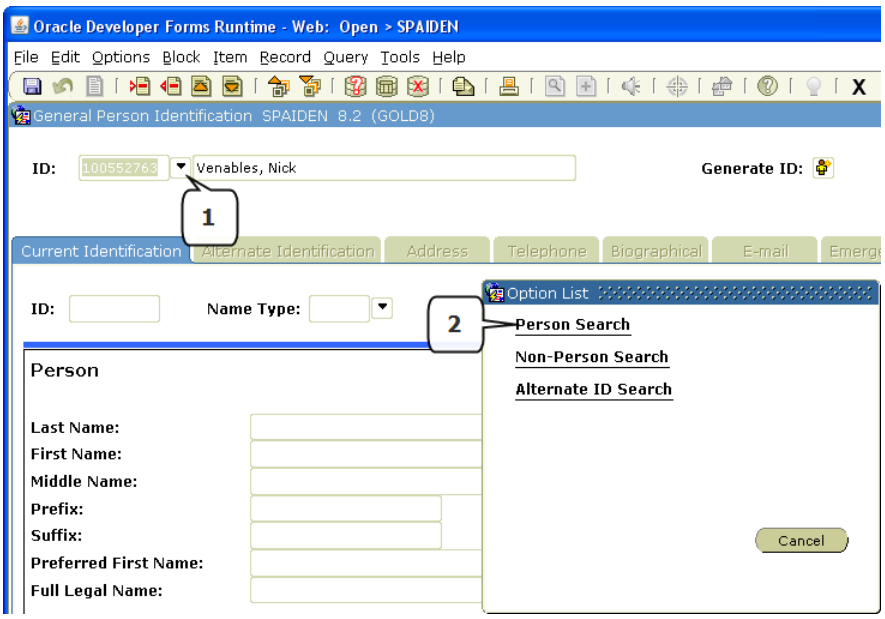

Figure 3

1.6. The **SOAIDEN** form will then open (Figure 4).

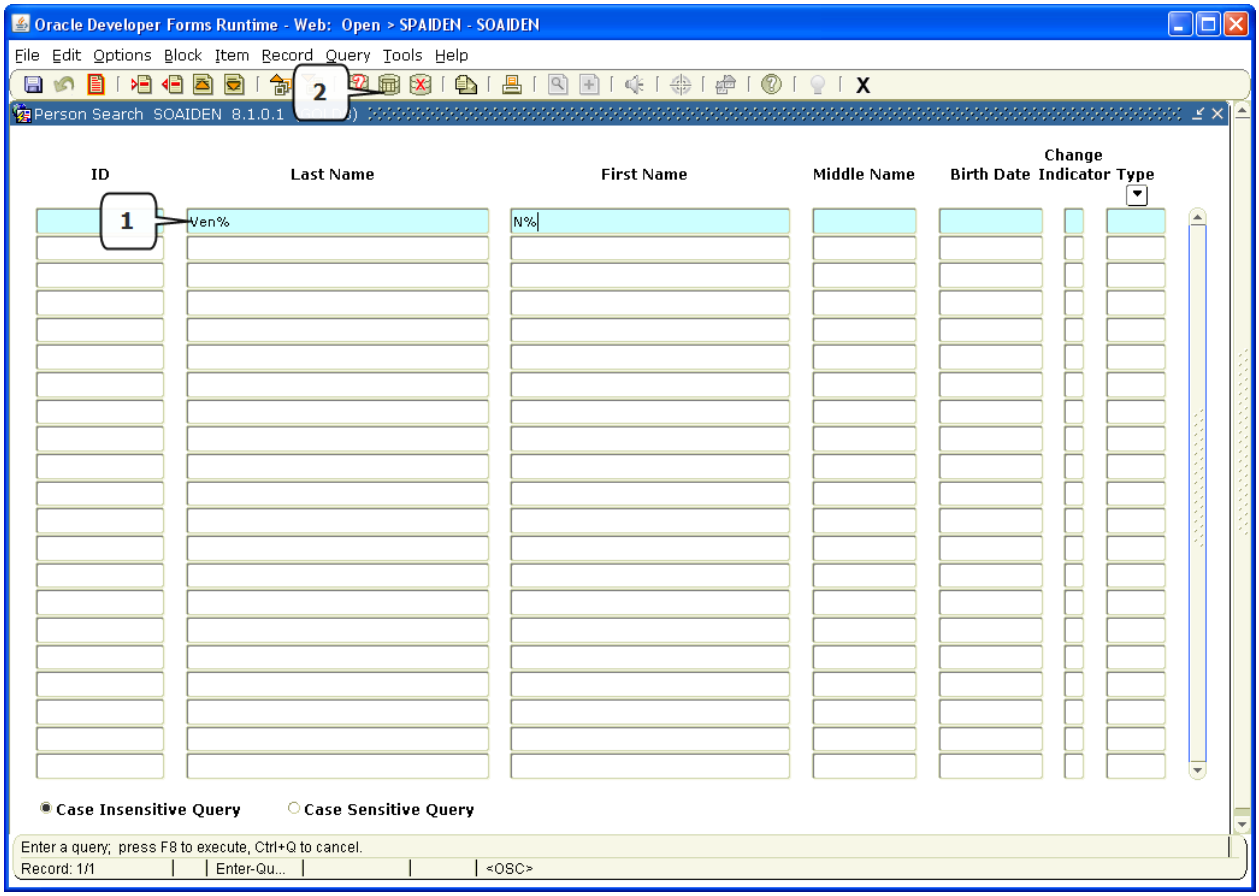

Figure 4

1.7. Enter the details you know as search criteria in the relevant fields, using wildcard % where necessary, for example in the *Last Name* field (Figure 4, Box 1). The more detail you provide for the search, the more accurate it is so the fewer potential matches. Click the *Execute Query* icon (Figure 4, Box 2) to display the search results.

1.8. To select the Person you want to view in **SPAIDEN**, double-click the *ID* field for that Person. **SOAIDEN** will close and you will be returned to **SPAIDEN** with the selected Person populated in the Key Block.

2. PERSON NAME DETAILS

2.1. *Block down* from the Key Block to the *Current Identification* screen, which contains the *Person* block (Figure 5, Box 1). This block shows the name details for the Person, including *Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name* and *Full Legal Name*.

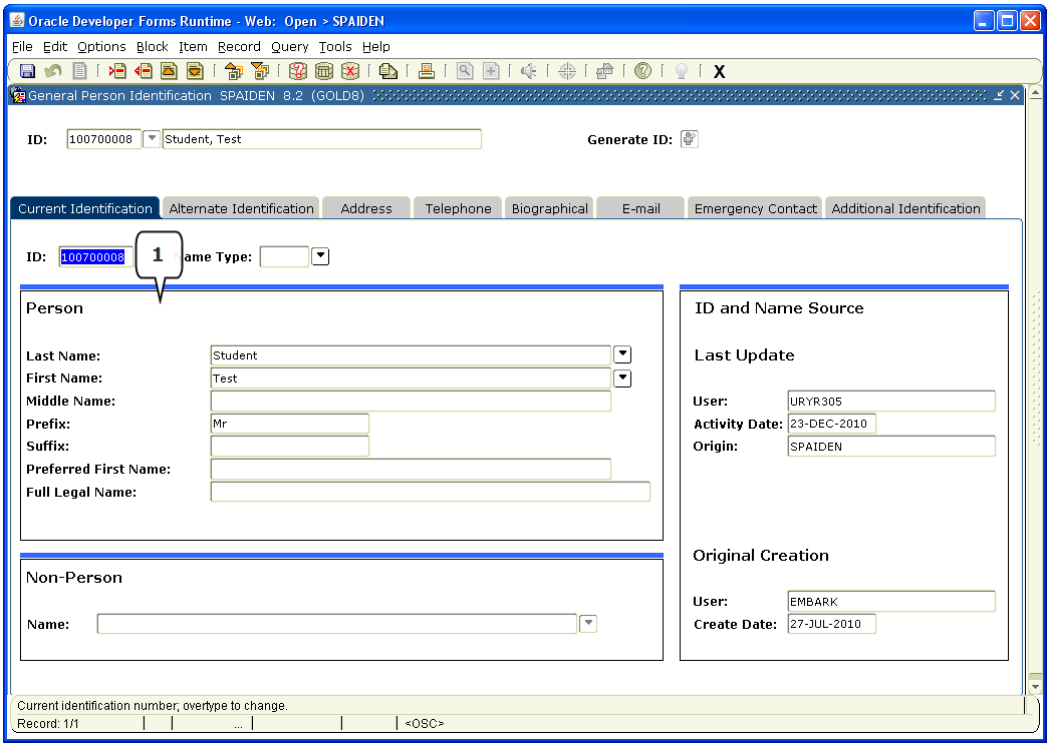

Figure 5

2.2. Most of these fields should be self-explanatory. The *Preferred First Name* is used when Students would like to be known by a nickname or shortening of their First Name (e.g. Nick rather than Nicholas) or for Overseas students who take a 'British' name. This will also be shown in the next block, *Alternate Identification* (Figure 6).

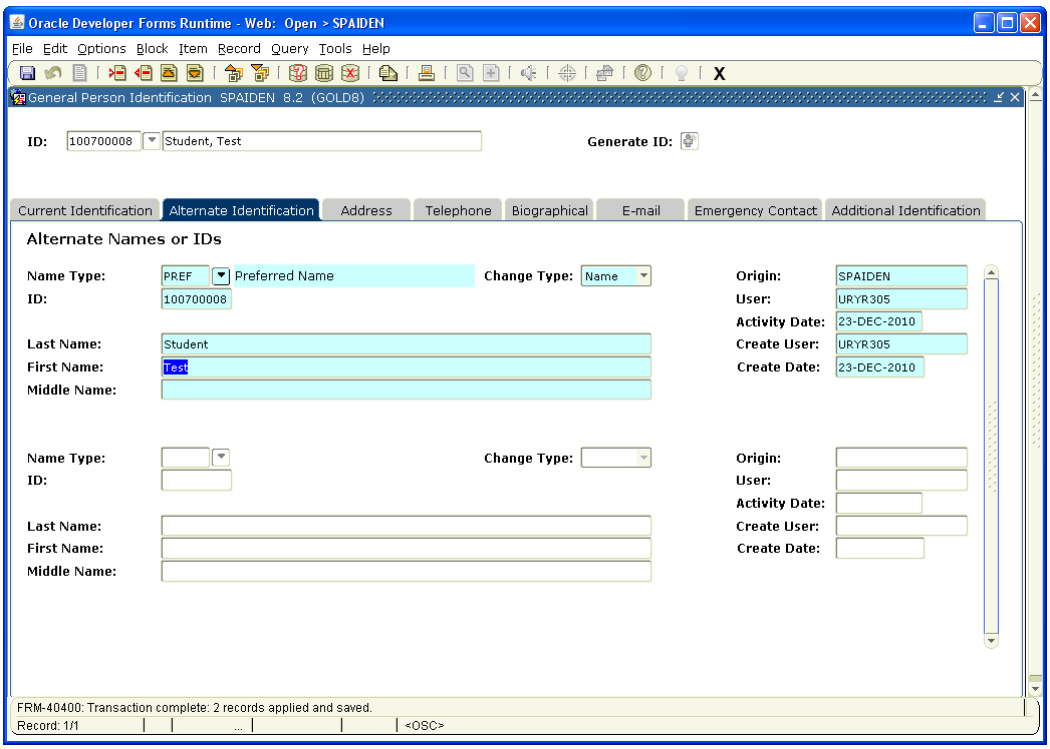

Figure 6

3. ADDRESSES

Addresses are a primary means of contact for any Person type in Banner, and they are entered into Banner in a variety of ways. Some addresses may be entered by Staff, some may be loaded into Banner in application files, and some will have been entered by Students themselves (during Online Sign-Up and throughout their study).

3.1. Addresses can exist in several types – click the 'Address' tab in **SPAIDEN** or block down to it to view the available addresses for your currently selected Person (Figure 7).

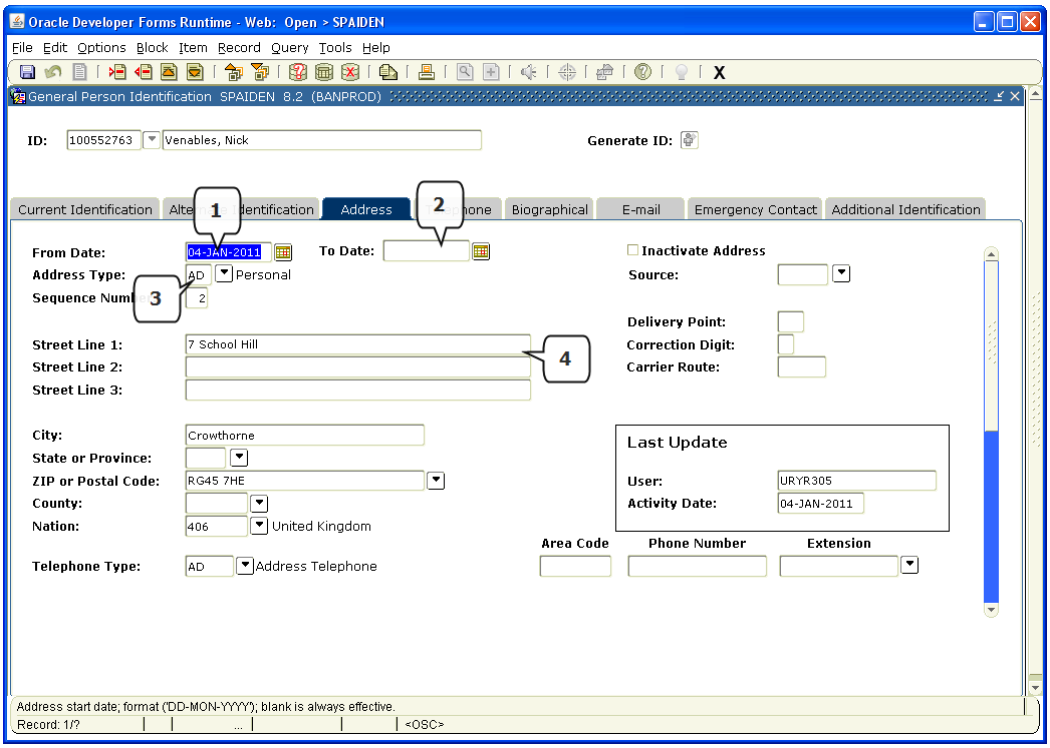

Figure 7

3.2. The *From Date* field (Figure 7, Box 1) indicates when the Person started at that address – typically though, it will be when the address was first entered. The *To Date* field (Figure 7, Box 2) indicates when the address is still active until. If this field is blank, it means there is no known end date for the address – in other words, it's active for the foreseeable future.

3.3. The *Address Type* field (Figure 7, Box 3) shows one of the following:

AA – Recruitment Agent Address
AD – Personal Address (for Students, this is their **Term Time** address)
FW – Forwarding Address (for Students, this is their **Permanent Home** address)
HR – Halls of Residence Address (this will be automatically populated via a file from the Accommodation system, PAMS)
RE – Recruitment Address (this address is where any documents such as the Prospectus will be sent for potential students).

3.4. The address itself is then shown in a series of fields (Figure 7, Box 4). Additional address records that exist for the Person can be viewed by using the Scroll Bar, or the Next Record icon on the Toolbar (or using the Arrow Down key on the keyboard). All current students are expected to maintain at least one current **Personal** address and at least one current **Forwarding** address. It is the student's responsibility to keep them up to date if they change throughout the Academic Year, and they should also confirm them or update them before the start of each Term during their Online Sign-Up.

4. TELEPHONE

4.1. The 'Telephone' tab in **SPAIDEN** shows any telephone numbers that have been entered for the Person. Again, like Address, there are a number of different *Telephone Types* (Figure 8, Box 1):

AA – Application Agent Telephone
AD – Address Telephone
FAX – Fax
FW – Forwarding Address Telephone
HR – Hall of Residence
MOB – Mobile
RE – Recruitment
UH – UCAS Home

Telephone Number is not required for a Person record. Multiple numbers are possible as 'current' since a student may have an AD number, a FW number and a Mobile number.

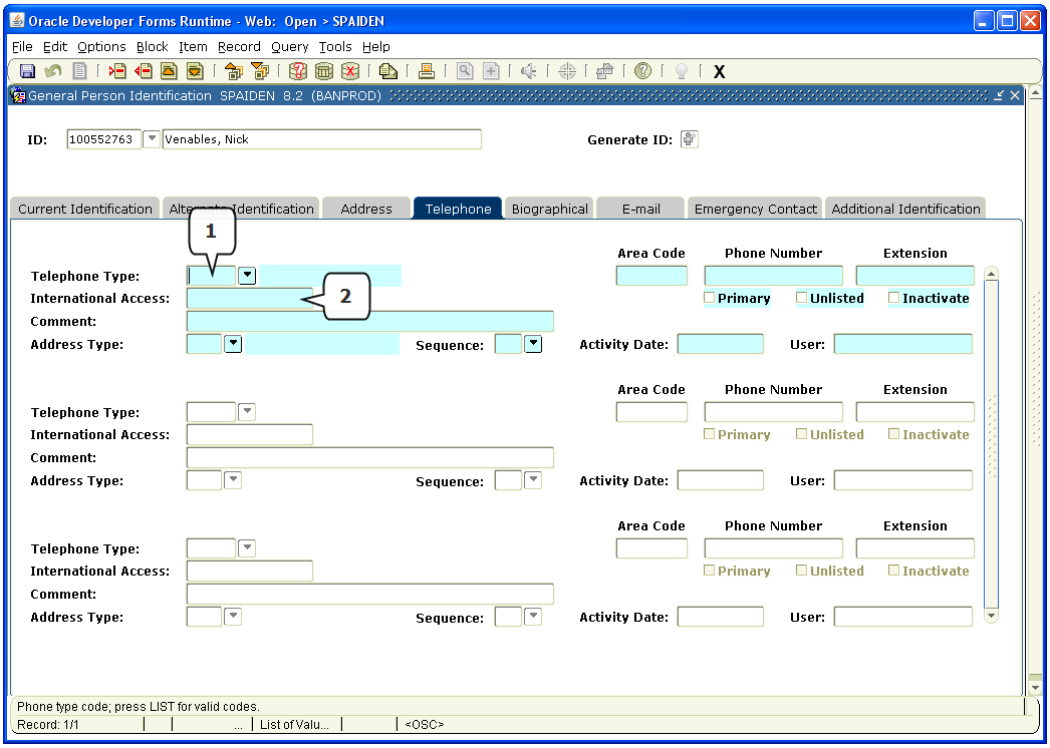

Figure 8

4.2. The actual telephone number is stored in the field labelled *International Access* (Figure 8, Box 2). The full telephone number is shown here, without any spaces, e.g. 01784414936. The other fields on this block are not used.

4.3. As people can have multiple telephone numbers, you can scroll down through the telephone number records in the usual ways.

5. BIOGRAPHICAL

5.1. This block shows the *Gender* (Figure 9, Box 1), *Date of Birth* (Figure 9, Box 2 – which then calculates the age in the *Age* field below), and the *Ethnicity* (Figure 9, Box 3) if available.

5.2. There is also a *Deceased* tickbox indicator (Figure 9, Box 4). If this box is ticked, the Person this record relates to is deceased and they should be excluded from any form of contact and will not appear in reports.

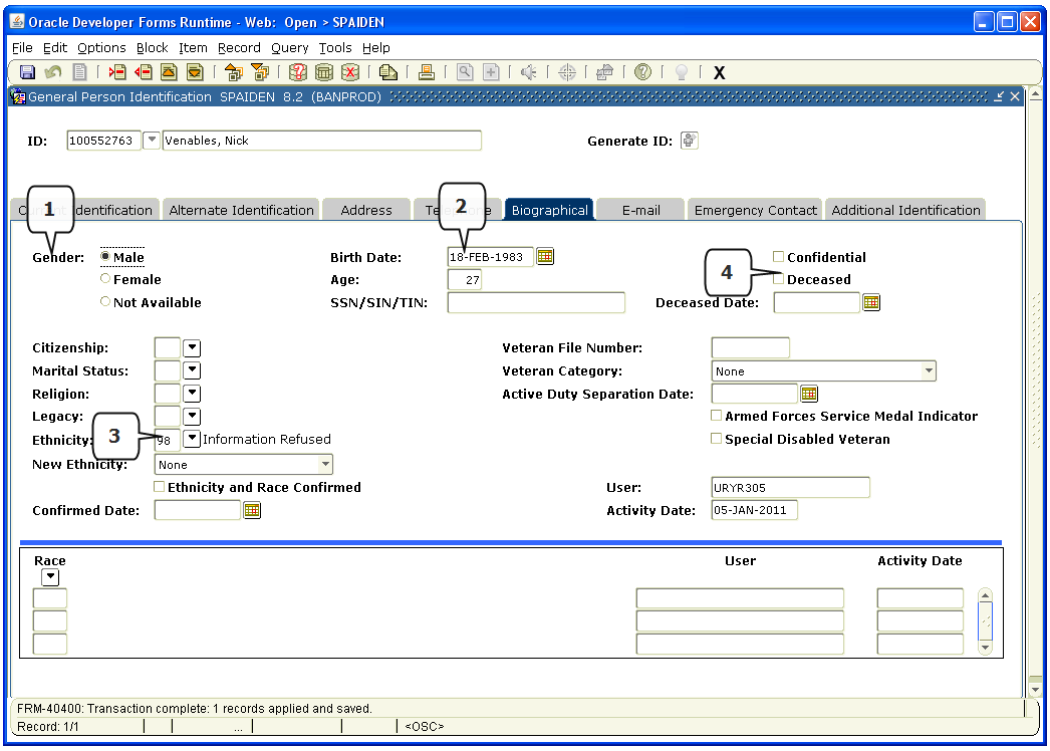

Figure 9

6. E-MAIL

6.1. Any E-mail Address for the Person held in Banner will be listed here. Like Addresses and Telephone Numbers, E-mail Addresses all have an *E-mail Type* (Figure 10, Box 1). The *E-mail Address* (Figure 10, Box 2) is then listed in full. Students will have a Royal Holloway Email Account address of their Banner ID, followed by "@rhul.ac.uk", e.g. 100552763@rhul.ac.uk. E-mails sent to this address will be directed to the student, if you don't know their full e-mail address.

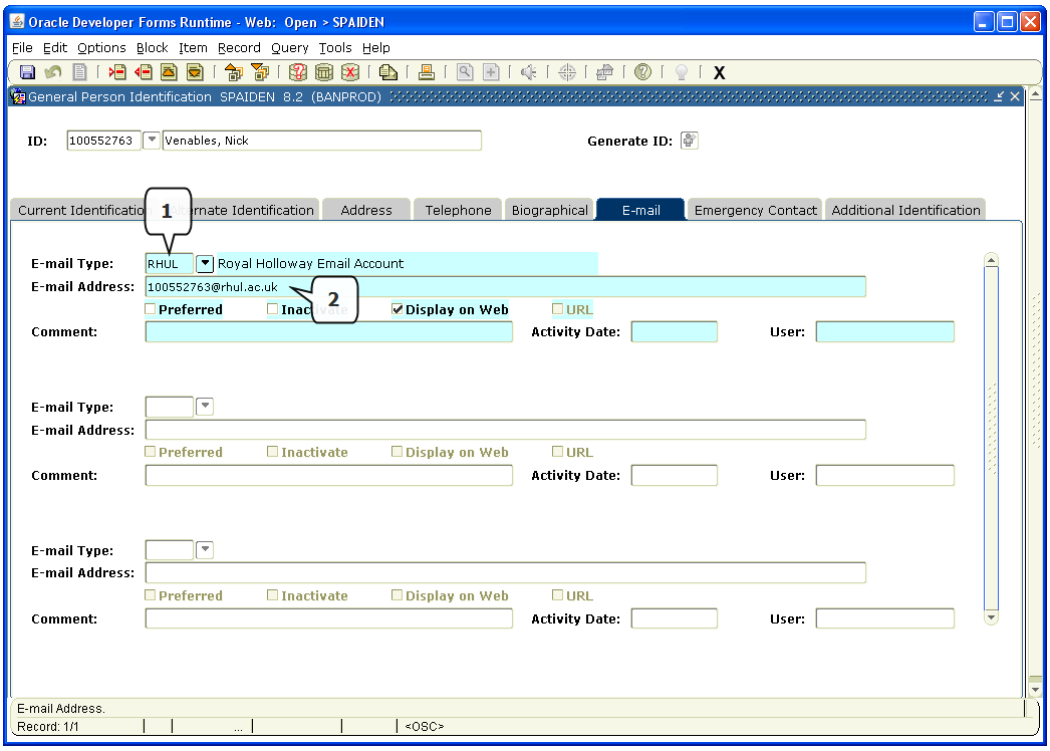

Figure 10

7. EMERGENCY CONTACT

7.1. All current students must provide at least one Emergency Contact when they complete their Online Sign-Up, and this must be confirmed or updated for each Term of study (Figure 11).

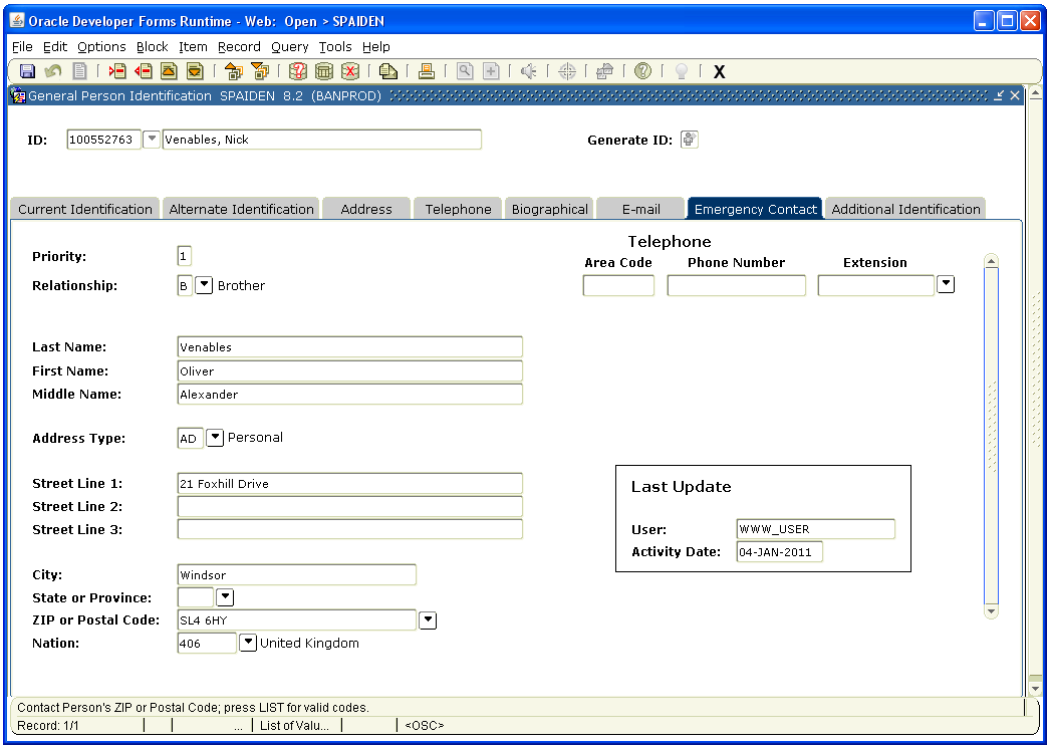

Figure 11

8. ADDITIONAL IDENTIFICATION

The last tab of **SPAIDEN** is 'Additional Identification'. We do not currently use this block so you should not need to refer to it.