



Eastern Illinois University

Enterprise Information Systems/Banner

Data Standards Manual

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Custodians Group

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1.0 Data Integrity

1.1. Purpose

The purpose of this document is to define the procedures to ensure appropriate controls are in place for managing Banner security, access, data, and upgrades. This document defines the responsibilities of users who input and access the data. Divisions/departments may have individual guidelines that supplement, but do not replace or supersede this document.

1.2. Data Integrity

By law, certain data is confidential and may not be released without proper authorization. Users must adhere to any applicable federal and state laws as well as Eastern Illinois University (EIU) Internal Governing Policies.

Data and information derived from data are vital assets owned by the University. All EIU data and information, whether maintained in the central database or copied into other data systems (e.g. personal computers) remains the property of EIU. Access to data should not be approved for use outside a user's official University responsibility. Data will be used only for legitimate EIU business.

Access to University data (regardless of who collects or maintains the data) shared by knowledgeable employees will result in effective and accurate information. The University must protect the security and confidentiality of data, while creating procedures that do not unduly interfere with efficient conduct of University business.

Division/department heads will ensure that, for their areas of accountability, each employee is trained regarding user responsibilities. As part of that training, each user will read, understand, and agree to abide by the stipulations in this document.

Division/department heads will ensure a secure office environment with regard to all EIU data systems. Division/department heads will determine the data access requirements of their staff as it pertains to their job functions before submitting a NetID Request Form.

All procedures and data systems owned and operated by EIU will be constructed to ensure that:

1. All data is entered accurately.
2. Accuracy and completeness of all data is maintained.
3. System capabilities can be re-established after loss or damage by accident, malfunction, breach of security, or natural disaster.
4. Security breaches be controlled and promptly detected.

1.3. Data Custodians

Data Custodians and/or designees are the primary contacts within departmental workgroups for issues relating to the creating, maintaining, accessing, or otherwise working with the data for their functional areas. Data Custodians and/or their designees are responsible for:

1. Knowing how to use Banner to process data in the specific module.
2. Ensuring that major technical decisions reached and activities underway or planned most effectively support the current goals and strategies of the department.
3. Coordinating the establishment and adoption of policies and procedures relevant to the overall accuracy and completeness of data in their functional area.
4. Ensuring data in their functional areas is available to others both within and outside of their functional areas. Before requesting that the ERP Security Administrator grant access to the data, the Data Custodian shall be satisfied that the person requesting access has a clearly demonstrated “business need to know” and understands EIU’s data protection and use requirements. At the discretion of the Data Custodian, data may be made available to the person requesting access by way of direct on-line access to the data, and electronic or a paper report, permission enabling the person to generate his/her own report, or any other data access or distribution method agreed upon by the Data Custodian and the person requesting the data.
5. Conferring with other Data Custodians about inter-departmental requests and impending changes. (Note: Person’s requesting access to data outside of their functional areas should make their requests through the Data Custodian for their own functional area.)
6. Asking the ERP Security Administrator to assign system NetID permissions to access data (query or maintenance) for user requests within the Data Custodian’s own functional area. When a user in a cross-functional area has requested access, the Data Custodian must be satisfied (as stated above) that the request is legitimate before asking the Security Administrator to grant the appropriate security permissions.

7. Coordinating maintenance and control of the validation and rule tables. These tables and processes define how business is conducted at EIU.
8. Reviewing the Sungard Higher Education Banner Release Guides at the request of ITS staff to assess the impact of newly available Banner upgrades. The validation and approval of software releases is the joint responsibility of the Data Custodian and the ITS staff.
9. Ensuring that function-specific data standards and processes are documented and reviewed at least annually.
10. Resolving Data Standards issues

1.3.1. EIU Data Custodians

AREA OF RESPONSIBILITY	DATA CUSTODIAN
Advancement	Director of Alumni Services
Finance	Director of Accounting and Finance
Financial Aid	Director of Financial Aid
Human Resources	Director of Human Resources
Student	Registrar
General	Director of Planning and Institutional Studies
Informational Technology Services	ERP Security Administrator

See Section 25 for Data Custodian Procedures

1.4. Access to Online EIU Data

Access to EIU data is based primarily on an employee's job classification/role, and access is issued as a consequence of employment in that classification/role. For additional access, the following apply:

Below are the requirements and limitations for EIU divisions/departments to obtain display (inquiry) and update (add/edit) access to on-line University data.

Access to the Banner administrative system cannot proceed until the user is created in General Person and has an email account. The EIU NetID for the administrative system (as well as email and other single sign on accounts) will be the first initial, middle initial, last name plus a number (if more than one person has the same FMLastname). If the user does not have a middle name, the middle initial will be omitted. If a user has multiple first names the initial of the first first name will be used. If a user has multiple middle names the initial of the first middle name will be used. If a user has multiple last names

all will be used without a hyphen. NetID's are limited to twenty characters and the last name will be truncated if it exceeds the limit.

Division/department heads must request access authorization for every user under their supervision by completing and submitting a BanAccess Request Form to the appropriate Data Custodian (the form may be obtained from the EIU Banner web site). When the request is approved by the Data Custodian, the form will be forwarded to ITS, ERP Security Administrator, for processing. Under no circumstances will access be granted without written approval of the division/department head and Data Custodian.

Banner System access will be established based on job function. Update capability should be carefully considered and approved by the division/department heads and the Data Custodian. Each user will be assigned an access level, possibly several access levels, depending on their particular needs as established by their division/department head and approved by the Data Custodian(s).

1.4.1. User Responsibilities

All users must understand that data security is every user's responsibility. The Banner system tracks changes made to data by NetID.

- Users are responsible for understanding all data elements that are used. If a user does not understand the meaning of a data element, the user should consult his/her supervisor or the appropriate Data Custodian (see the Data Custodian section).
- Users must protect all University data files from unauthorized use, disclosure, alteration, or destruction.
- Users are responsible for the security, privacy, and use of data within their control and responsible for all transactions occurring during the use of their Banner ID and password.
- Users are not to loan or share access codes with anyone. If it is found that a user inappropriately loans or shares access codes, they are subject to disciplinary action, up to/or including termination (refer to IGP).

1.5. Requests for Other Confidential Information

Requests for non-directory/personally identifiable information from the Banner System must be directed to the appropriate Data Custodian. The Requester will provide the Data Custodian with the necessary parameters and timeframe. The Data Custodian will determine if the request meets the requirements of FERPA,

HIPAA, FOILA, and Gramm-Leach-Bliley Act, in addition to other state and federal laws.

2.0 Data Change Rules

2.1. General Change Rules

The following rules govern general person changes in the Banner system.

Students will direct all non-self service changes to the Records Office. Current and former faculty and staff will direct all change requests to Human Resources. Faculty/staff who are also students will direct all their change requests to Human Resources. Donors and alumni will direct all non-self service changes to Alumni Services. Vendors will direct their changes to the Business Office.

A common change form should be used and appropriate documentation provided except for Advancement. Due to employee name change documentation requirements, the General Person form (GUASYST) should be checked before any change is done. If the person is part of the Human Resources module as an employee, a social security card is required as name change documentation. The person must go in person to Human Resources in order to make the change.

2.2. Rules for Clean and Accurate Records

- **Search first.** Before you create a new record for a person or organization, you **MUST** conduct a name and/or ID search using the common matching process to prevent entering a duplicate record.
- **Data changes.** Make data changes **ONLY** when you have proper documentation and when you follow the procedures established by the Data Custodian.
- **Remember** – Some data fields have specific data entry rules. At a minimum, name, gender (not available is allowed) and ethnicity code (not reported is allowed) must be entered for all persons. If a social security number is available, it must also be entered. An appropriate procedure will be created for each of the following Banner modules: Student, Financial Aid, Finance, Human Resources, and Advancement.

- Special characters that should not be used are ampersand (&) and percent sign (%).

3.0 General Person/Non-Person Information

The following guidelines should be adhered to for all records added to the Banner system.

3.1. Identification Number Standards

All entities added to the system will be created using the system generated NetID.

Person: any entity that is added to the system that is an individual (student, staff, faculty, alumni, or donor).

Non-Person: any entity that is added to the system that is not an individual (vendor, corporation, etc.).

3.1.1 Standards for Non-Person ID Number

If dictated by a Banner process an assigned ID number can be used in place of the generated ID. For example, alternative loan lenders must have their lender code entered for the Banner ID for the Banner process to function properly.

4.0 ID

4.1. Standards for Person ID

A system assigned ID will be established for all records the first time they are entered into Banner.

A system assigned ID will be generated for each person converted from a legacy system. The Social Security Number will be converted from the legacy system into Banner's SSN/SIN/TIN field, not as an alternate ID. Advancement constituent IDs will be converted from the legacy system to Banner. This recommendation is made with the understanding that:

- Banner allows the storage of multiple Alternate IDs
- All Alternate IDs are searchable, independent of name
- Social Security Number is a searchable field, independent of name, in all Banner modules

5.0 Names

5.1. General

The University considers the 'current name' in Banner as a person's legal name. A separate field exists in the HR module for legal name for employees. Without official documentation, the name provided on an application will be considered the legal name. Official documents could include a birth certificate, court order, social security card, marriage license or passport.

Names for persons and non-persons should have a customer friendly appearance. The objective is to enter names and addresses using upper/lower case format (i.e. not all caps or all lower) so that when a name is printed on correspondence, it looks contemporary and professional. Name formats have also been developed to meet postal regulations.

It is recommended that offices that collect person names **designate separate fields on the form for that person to indicate first name, middle name, and last name**. This will facilitate our ability to enter a name correctly into the respective fields in Banner.

5.2. Name Type and Description

The Current Name field in Banner does not require a name type to be associated with a name. The name type of LGCY automatically populates during conversion. In addition, EIU has approved PREV, MAID, DIPL ADV, and PREF name types (previous, maiden name, diploma, advancement and preferred names). Additional name types may be approved through the Cross Functional Collaboration Group (CFCG).

5.3. General Standards

Enter the last, first, and middle names exactly as the person has indicated or as provided on required documentation. If given the full middle name, enter the full middle name. DO NOT change a full name to an initial. Always use upper/lower case format (i.e. not all caps or all lower) for names.

5.3.1. Case

All information is typed in upper/lower case format (i.e. not all caps or all lower). If the person's name starts with a lower-case letter, enter the first letter in lower case.

Example: duBois

5.3.2. Initials and Abbreviations

Do not use periods after initials or abbreviations.

Pamela A. Humphrey Hogan

Enter as: first name = Pamela / middle name = A / last name = Humphrey Hogan

Leslie M.F. Donner

Enter as: first name = Leslie / middle name = M F / last name = Donner

James St. Martin

Enter as: first name = James / middle name = blank / last name = St Martin

D. Gary Smith

Enter as: first name = D / middle name = Gary / last name = Smith

Windsor K.R.L. Lewis

Enter as: first name = Windsor / middle name = K R L / last name = Lewis

In cases where a single character is designated as the first name followed by a full middle name, place the single character in the First Name field and the full middle name in the Middle Name field.

Example: W Mark Jones

Enter as first name = W / middle name = Mark / last name = Jones

If you later receive proper documentation that the 'W' stands for William, change the name in Banner to:

First name = William / middle name = Mark / last name = Jones

5.3.3. Persons with Two or More Given Names

If a person has more than two given names, and has not specified which are considered first vs. middle name(s), enter the first two names into the First name field and any other names into the Middle name field.

Example: Anne Marie Susan Smith

Enter as: first name = Anne Marie / middle name = Susan / last name = Smith

Example: Billy Joe Daryl Thomas Miller

Enter as: first name = Billy Joe / middle name = Daryl Thomas / last name = Miller

Upon request, it is acceptable to enter two names in the first name field.

Example: Anne Marie Smith

Enter as: first name = Anne Marie / middle name = blank / last name = Smith

5.3.4. Long Names

If a person's first, middle, or last name is longer than the field allows in Banner, enter as many characters as the field allows. The remaining characters will be truncated.

5.3.5. Persons with One Name

It is common in some countries for a person to have just one name (not a first, middle, and last name). If that is the case, enter the person's name into the LAST NAME field and leave the first and middle name fields blank.

5.3.6. Punctuation & Spaces

Use hyphens, apostrophes, dashes, and spaces (one space maximum) exactly as the person indicates. Do not use commas or periods in any name field, *except in the diploma name field—used for the purpose of printing diplomas*. Do not add punctuation where there is none. In the following examples, any could be correct.

O'Donnell	Odonnell			
Dell'Acqua	DellAcqua	Dellacqua		
Al-Hassan	AlHassan	Al-Hassan	alHassan	Al Hassan
St Denis	StDenis	St-Denis	SainteDenis	Saint-Denis
Saint Denis				
Vandervaart	Van der Vaart	Vander Vaart		

5.3.7. Prefixes and Suffixes

Salutations (such as Dr, Rev, Mr, Mrs, Ms, etc.) are considered prefixes and should be entered in the PREFIX field on General Person Forms. Prefixes will be entered in upper/lower case with no punctuation (see Appendix A).

Enter Mr for males or Ms for females if no preferred salutation is indicated.

Prefixes are important to the Advancement module. You may update them but do not delete them.

We will not be using professional status indicators (such as MD, DO, PhD, DVN, ESQ, etc).

DO NOT include any punctuation with a prefix or suffix.

Example:

Correct: Mr Ms Dr
Incorrect: Mr. Ms. Dr.

DO NOT enter prefixes or suffixes in the name fields of the current identification block on the Banner IDEN forms.

5.3.8. Generational Indicators

Generational indicators (such as Jr, II, III, etc.) will be entered in the suffix field.

5.3.9. Previous Names

With the exception of corrections made due to data entry errors, it is our policy to maintain previous name information in Banner. Forms used by some University offices ask for a person's previous name or names (for example: admission applicants). Enter the earliest name first:

Example:

Name: Lee Livingstone
Previous Name: Lee Stanley

Note: When a new person is being entered into Banner and that new person has a previous name that is deemed necessary to be recorded, enter the

previous name into the system FIRST and save the record. Change the name using the Banner name change procedure on the xxxIDEN form.

Steps:

Enter previous name (Lee Stanley) and save.

Enter current name (Lee Livingstone) and save.

Previous name will appear in the alternate identification block.

5.3.10. Legal Name

The 'Current Name' field in Banner is considered the legal name. The HR module has a field for legal name for employees. The Preferred First Name field is used for variations to the legal name. The legal name is maintained within the HR module.

DO NOT add any data in this field.

5.3.11. Preferred First Name

Enter the spelling and format of the preferred first name as supplied to you by the person. If no preferred name is given, leave the field blank.

Examples:

Current Name: William Knight

Preferred First Name: Bill

Current Name: D Mark Williams

Preferred First Name: Mark

Note: Preferred first name is considered for 'informational use' only. It is not used in Banner reports supplied with the system, but is available for use on any reports or letters generated and maintained by EIU.

5.3.12. Non-Person Names

All information is typed in upper/lower case format (i.e. not all caps or all lower). If an 'article' (a, an, or the) is used as an adjective within the full legal name of a non-person entry, it should be included when entering the name in Banner. If a non-person name begins with the word 'The,' it should be included when entering the name in Banner (e.g. The Colorado College).

ABC Trucking

JF Kennedy Company

First National Bank

See Appendix D for list of University offices, departmental titles and abbreviations.

The ampersand (&) can be used only when part of a formal corporate name (e.g., Baltimore & Ohio Railroad). Use 'and' in all other cases. Periods should not be used.

Abbreviations should be used for Co, Corp, Ltd, or Inc when used after the name of a corporate entity. All other forms of abbreviations should not be used for the corporate entity name, unless abbreviations are necessary due to line length constraints.

Governmental departments and agencies should be entered with the governmental entity as the vendor. Each department or agency should be listed as a separate address sequence.

Example: State of Illinois Department of Revenue

State of Illinois - Vendor name field
Department of Revenue - Address 1 field
600 Stratton Bldg – Address 2 field

6.0 Addresses

6.1. General

University-wide conventions are critical for shared data such as addresses; we should be mindful of the purposes for which the data are entered. For example, units with marketing responsibility (such as Alumni, Athletics, and Admissions) must be able to produce individualized correspondence conforming to formal addressing rules. Units such as Financial Aid, Accounts Payable and Student Accounts may have less stringent formatting requirements, but should still follow the standards set forth here. These standards must balance four considerations:

Banner System Requirements
Accepted standards for formal communications
U.S. Postal Service guidelines

International address requirements

All addresses must meet United States Postal Service (USPS) addressing requirements. Consult the USPS website for the most up-to-date information. According to the USPS Postal Addressing Standards, “A standardized address is one that is fully spelled out, abbreviated by using the USPS standard abbreviations... and uses the proper format for the address style...” (p. 1). The guidelines expressed herein are designed to convey the minimum standard requirements in order to enhance the processing and delivery of mail, reduce instances of ‘undeliverable’ mail, and position the University to obtain the most advantageous postal rates. When searching for a specific address at the USPS website it is necessary to select either residential or commercial before entering an address.

The Records Office, or designee(s), will be responsible for student address changes. Human Resources will be responsible for address changes of employees until the last W2 is issued.

While data may be conditioned (or reformatted) on output (e.g. date format), it is our intention that addresses be entered exactly as they will print on correspondence, reports, etc. Accurate, consistent address data entry is vital. Given these considerations, the following address data entry standards are recommended.

6.2. Address Types and Sources

It is our desire to maintain a standardized list of address types based on their purposes, rather than separate address types for each university department. This will reduce redundant data entry. Thus, an individual may appear in accounts payable, be an alumnus, employee, and enrolled as a current student in the School of Business and have only a single address. Alumni Services can put a ‘preferred indicator’ on any address type in the Advancement module. This indicator can only be viewed in the Advancement module.

6.2.1. Address Types

<u>Code</u>	<u>Description</u>	<u>Explanation</u>
BI	Billing	Required by SunGardHE – alternate for student billing
BU	Business	Required by SunGardHE – vendor and Advancement business addresses
HC	Housing Contract Address	Updated only by Housing Office – for students living on-campus the SM address should match. Housing will need to notify Records Office when HC address is changed.

HQ	Corporate Headquarters	Advancement may use
LS	Lost address	Used by Advancement during conversion
MA	Mailing	Required by SunGardHE. Campus address for HR, also used for Accounts Payable checks
MG	Matching Gifts	Address maintained primarily by Advancement to track matching gifts and their company address(es).
PA	Parents	Required by SunGardHE - address of parent or guardian of a student.
P1	Additional Parents 1	Additional Parent/Guardian address
P2	Additional Parents 2	Additional Parent/Guardian address
PR	Permanent	Permanent address for students, alumni and donors.
RE	Special Refund	Address used for student refunds during temporary interface BRS Plus/Banner Finance.
RF	Reference	Address/phone of person who can be contacted if person of record is lost, used primarily by Advancement.
SE	Seasonal	Address maintained by Advancement for the purpose of tracking multiple residences that are not occupied on a year round basis. Primary address should be PR and secondary address should be SE.
SM	Student Mailing	For students only (both on and off campus) – used by Financial Aid and Student
W2	W2 tax form	Address on W2 forms
XX	Accounting Feed	Required by SunGard HE - addresses needed for accounting feeds
ZB	Advancement Business	Business address for alumni and donors just for <u>conversion</u> purposes. Primary business address type is BU.
ZP	Advancement Permanent	Permanent address for alumni and donors just for <u>conversion</u> purposes. Primary permanent address type in PR.

Address source is used with the address to denote the origin of the address. Valid address sources are:

6.2.2. Address Sources

CODE	DESCRIPTION
ALFI	Alumni Finder
CALL	Phone call from individual
EDI	Electronic data interchange (tape load)
GIFT	Gift document
INFR	Information from relative
LGCY	Obtained from pre Banner systems
SELF	Self Reported
PHON	Annual Fund
POST	Post Office
OUTS	Outside agency
WEB	World Wide Web

6.3. Sources for Additional Information

There are style manuals that deal with formal addressing style. Several USPS publications deal with addressing standards. The most comprehensive and accessible publication is Postal Addressing Standards Publication 28. This publication is available from the USPS.

The United States Postal Service (through the USPS National Customer Support Center) and the Canadian Postal Service (Canada Post) have a variety of useful websites that provide extensive address and ZIP code information:

The Melissa Data website is also helpful to determine the exact spelling of a street or city, the street numbers that belong to a specific address and if the address is residential or commercial. You may enter a ZIP code or a city and state to retrieve all street names in alphabetical order.

6.4. General Standards

All information is typed in upper/lower case format (i.e. not all caps or all lower) unless otherwise noted.

6.4.1. Symbols

Symbols should never be used in the first position of an address field.

The only special characters allowed in addresses are forward slashes (/), hyphen (-), and apostrophe ('). The use of other special characters may cause problems.

The designation for 'in care of' should be abbreviated as 'c/o'. The designation for 'attention' should be abbreviated as 'ATTN' as provided by the USPS standards. Either should be entered on the first street address line.

6.4.2. Street Names

Street names are composed of a number, the street name, and a possible unit designator.

6.4.3. Punctuation

Punctuation in the street number and name is normally limited to periods, slashes, and hyphens and should be used if space permits. Periods are

acceptable if they are part of the official street address number. (Ex., 39.2 Rd)
Do not use periods after abbreviations.

With the exception of the hyphen in the ZIP plus 4 configurations,
punctuation in the address may be omitted if necessary.

Periods:	39.2 Rd
Slashes (fractional addresses):	101 ½ Main St
Hyphens (hyphenated address):	289-01 Montgomery Ave

6.4.4. Secondary Address Unit Designators

If the street address contains a secondary unit designator, such as an apartment, suite, building, etc., the preferred location (according to USPS guidelines) is at the end of the street address. The pound sign (#) should never be used.

Examples:
102 Main St Apt 101
1356 Executive Dr Ste 202
1600 Central Pl Bldg 14
55 Sylvan Blvd Rm 18
1111 North West Rd Unit 10
RR 1 Box 189

When secondary delivery information, e.g., Apt or Suite, is part of the address but does not fit on the Delivery Address Line, wrap up all components of the secondary information immediately above the Delivery Address Line.

Example:
Ms Michelle Simpkins
Bldg 14-400
14200 Old South Mississippi Pkwy
Aurora, CO 80111-1111

6.4.5. Street Address and PO Box

Banner address formats allow three lines of street address information. If an address contains BOTH a street address and a post office box, the USPS will deliver mail to the first address line listed above the city/state/ZIP line. In this situation, it is preferred that the post office box be the last part of the address entered before the city/state/ZIP.

INFORMATION GIVEN – 2 EXAMPLES OF UNACCEPTABLE ENTRY:		CORRECT BANNER ADDRESS ENTRY:
Dr. John Franklin Smith	Dr. John Franklin Smith	Dr John Franklin Smith
Evergreen Building	Evergreen Building	Evergreen Bldg
1379 West Pine Street	P.O. Box 2351	1379 W Pine St
P.O. Box 2351	1379 W Pine St.	PO Box 2351
Denver, Colorado 87003	Denver, Colorado 87003	Denver CO 87003

Do not enter data into the second address line until data has been entered into the first address line. Also, data should not be entered in the third address line until data has been entered into the second line. Examples for a business, residential and campus mail are listed below:

Business Example:

Chanin and Levers Inc
c/o Marvin Martian
1600 Martian Blvd Ste 910
Mattoon IL 61938-3259

Residential Example:

Martha Furry
5511 IL Hwy 133
PO Box 205
Kankakee IL 61900-0205

Campus Mail Example:

Thom Sweater
135 University Ct
2105 Roosevelt St
Charleston IL 61920

6.4.6. Abbreviations for Street Designators

Street designators should follow the standard USPS standards. This information is available at the USPS website. The street suffix is changed often and should be checked each time a new address is entered. USPS has no national standard abbreviation for County Road. Local USPS standards must be used to get the best postal rate. This will need to be checked by individual users. It is acceptable to use CO RD where space is a consideration.

6.4.7. City

Banner is configured to automatically enter the city name when a ZIP code is entered. **This is the preferred method of entering the city name.**

If more than one city is listed for the ZIP code entered, you must choose the correct city from the associated list. If the city does not appear on the list and the ZIP code has been verified to be correct, you may enter the information for the city by typing the correct city in the city field. If the preferred name

which defaults is not correct, it is acceptable to change the city to the actual city name. For example, when entering the ZIP code 63801, the city will default to Sikeston, but could also be the city of Minor. If requested, manually change the city to Minor following the standards below.

All information is typed in upper/lower case format, i.e. not all caps or all lower. Spell out city names in their entirety. DO NOT abbreviate city unless absolutely necessary. If it is necessary to abbreviate city names to fit within the 20 characters allowed by Banner, use abbreviation standards described herein or in the USPS Postal Addressing Standards.

There are some inconsistencies in USPS guidelines for city abbreviations (e.g., Mount Vernon and Mt Zion). Therefore, refer to the USPS website for approved spellings.

6.4.8. State and Province

Banner is configured to automatically enter the state name when a ZIP code is entered. This is the preferred method of entering the state name.

State/Province codes must be entered for all U.S. and Canadian addresses. The appropriate code may be selected using Banner software. For additional information, refer to the USPS Address Standards publication.

Canadian addresses must include the city in the City field and the Province in the State field.

6.4.9. County

Banner is configured to automatically enter the county code when a ZIP code is entered. This is the preferred method of entering the county code.

If no county defaults when entering the ZIP, enter the county code from the list of values in the validation form.

6.4.10. ZIP or Postal Code

ZIP or postal codes **MUST** be entered for all U.S. and Canadian addresses according to USPS guidelines.

United States- A hyphen must be entered when the entire 9 digit (ZIP plus four) ZIP code is available. If the last four digits are unavailable, enter the first five digits in the first five positions of the field without the hyphen.

Examples:
97203
97203-4798

Canada- Enter the six-character postal code by keying in 3 characters, a space and the last 3 characters. Do **NOT** use a hyphen to separate Canadian postal codes.

Examples:
T2T 2Y5
R2L 1N4

6.4.11. Nation Code

DO **NOT** enter a nation code for U.S. addresses. In Banner, the default nation designation is 'US'.

A nation code is required for all non-U.S. addresses. Banner maintains a list of all the current code options available.

NOTE: USPS request nation codes be in all caps.

6.4.12. Military Addresses - Overseas Locations

Overseas military addresses must contain the APO (Army Post Office) or FPO (Fleet Post Office) designation along with a two-character 'state' abbreviation of AE, AP or AA and the ZIP code.

Enter the ZIP code in the ZIP code field.

The APO or FPO code will default into the City field.

The military 'State' code (AA, AE, or AP) will also default into the State field.

AA for mail in the Americas other than Canada (340)
AE for mail going to Europe, the Middle East, Africa, and Canada (090 through 099)

AP for mail destined to the Pacific (962 through 966)

Examples:

SSGT Mario Martian
Unit 2050 Box 4190
APO AP 96522-1215

Sgt Cher Downey
PSC 802 Box 2625
APO AE 09777-0010

Seaman Duane Reeves
B Division
USS North Dakota
FPO AA 34093-2344

6.4.13. Military Addresses - Domestic Locations

All domestic military mail must have a regular street style address.

Examples:

Col Margaret Henry
Lowery Air Force Base
8205 E 6th Ave Apt 405
Denver CO 80230-7043

Capt Jack Harris
300 Bomber Blvd
Minot AFB ND 58705-5001

6.4.14. International Addresses

Enter an international address exactly as provided.

Do not abbreviate words that are spelled out.

Address line 3 should contain the full name of the province or state for a foreign address, with the exception of Canadian addresses. Canadian addresses should use the state/province code field for the province code.

Use the Nation Validation values to enter nation or country codes.

7.0 Telephone Numbers

7.1. General

An entity (person or non-person) may have multiple telephone numbers within the Banner system. Telephone numbers should be accurate and reflect the most recent data received. Supplemental information for international phone numbers may be added in the international access code field.

7.2. Telephone Types

A telephone type distinguishes each telephone number entered in the Banner system. There are two categories of telephone types. These types include general telephone types and address telephone types.

7.2.1. General Telephone Types

CODE	DESCRIPTION	EXPLANATION
CE	Cell Phone Number	Cell phone number associated with a person or non-person
FX	Fax Number	Fax number associated with a person or non-person
GE	General	Phone number not associated with an address

If there are multiple telephone numbers for a telephone type, you must indicate one primary telephone number for that telephone type.

7.2.2. Telephone Types

<u>Code</u>	<u>Description</u>	<u>Explanation</u>
BI	Billing	Billing phone
BU	Business	Business phone
CT	Campus Housing	Phone associated with campus housing contract
HQ	Corporate Headquarters	Phone of the corporate headquarters

MA	Mailing	Mailing (required by SCT)
MG	Matching Gifts	Phone maintained primarily by Advancement to track matching gifts and their company address(es).
PA	Parents	Phone of parent or guardian of a student.
P1	Alternative Parents 1	Additional Parent/Guardian phone
P2	Alternative Parents 2	Additional Parent/Guardian phone
PR	Permanent	Permanent phone for faculty, staff, students, alumni and donors.
RF	Reference	Phone of person who can be contacted if person of record is lost, used primarily by Advancement.
SE	Seasonal	Phone maintained by Advancement for the purpose of tracking multiple residences that are not occupied on a year round basis. Primary address should be PR and secondary address should be SE.
SM	Student mailing	Off campus local or alternative phone for student
W2	W2 phone number	Phone number associated with W2 address
XX	Accounting Feed	Addresses needed for accounting feeds.

7.3. General Standards

All regional and local telephone numbers, including on-campus phone numbers, are entered using the ten-digit format.

7.3.1. Telephone Numbers

The telephone number is presented in a three-field format.

The three-digit area code must be entered for all phone numbers including the local (217) area.

Enter the seven-digit number without inserting a hyphen. (Example: 3341756)

If an extension number is provided, enter only the digits of the extension. Do NOT enter EXT or X into the extension field. (Examples: 8961, 1764, or 378)

7.3.2. International Telephone Numbers

International telephone numbers should be entered in the international access code field. Enter numbers without hyphens or spaces.

The international access code field should include 011, telephone country code, city code and telephone number.

The telephone country code consists of one to four digits and is required (e.g. 876). See Appendix E.

The city code consists of one to three digits. Not all countries utilize city codes. The city code is often reported with a leading zero (0). Do NOT enter the zero.

The telephone numbers consist of four to seven digits.

International access code examples: 0114969634749

011 – required for non-NANP countries
49 – telephone country code
69 – city code
634749 – telephone number

7.3.3. Changes

When adding a subsequent telephone number of the same type, the prior telephone number should have the inactive box checked and the new telephone number added. Unless making a correction due to an initial entry error, do not change the prior telephone number.

8.0 Email

8.1. General

An entity (person or non-person) may have multiple email addresses within the Banner system. Email addresses should be accurate and reflect the most recent data received.

Only EIU email addresses (EIU Students, Faculty, Staff and Annuitants) will be maintained as the EIU email address type and will be used for official EIU communications.

For constituents in the Advancement module, the Preferred E-mail box should be checked when more than one personal e-mail address has been entered.

E-mail addresses that are no longer valid should be checked inactive.

8.2. E-Mail Address Types

PER	Personal – multiple personal e-mail addresses are allowed
EIU	Campus e-mail address
WORK	Employment e-mail address
PA	Parent e-mail address
P1	Parent 1 e-mail address
P2	Parent 2 e-mail address
BWEB	Business web page
PWEB	Personal web page

9.0 Calendar Date

9.1. General

Banner is set up to accept dates in the format MDY (Month, Day, Year).

Banner determines which parts of a date entered are the month, day, and year, and automatically converts and stores the date in the format DD-MON-CCYY

Year numbers 00 through 49 are converted to 2000 to 2049

Year numbers 50 through 99 are converted to 1950 to 1999

The century default can be overridden by typing in the 4-digit century & year

9.2. General Standards

Always enter four digits for the year.

Example: Enter 2002 as 2002 – not 02

Always enter two digits for the month and day.

Example: Enter January as 01
Enter the 5th day of the month as 05

You can enter a date without separators (no spaces or special characters) or you can use a dash (-) or slash (/) as separators.

Example: If you want to enter the date March 5, 2002, you can enter it any of the following ways:

03052002 03/05/2002 03-05-2002

In all cases, the date will be stored as: 05-MAR-2002

If you enter only part of the date, the rest of the current date is the default.

Example: If today's date is July 5, 2002, and you want to enter the date March 5, 2002, you can enter it any of the following ways:

03052002 0305 03
03/05/2002 03/05
03-05

In all cases, the date will be stored as 05-MAR-2002

If you enter a 't' in a date field and press <enter>, today's date will default in that field.

9.3. Dates in Job Submissions, Reports and Queries

Use the DD-MON-CCYY or DD-MONTH-YY format to enter date parameters for reports and processes run with the Process Submission Control Form (GJAPCTL).

Not all reports include the century with the year of their output.

Specify all four digits for a year when you query on a date field. For example, enter 26-JUN-2000, not 26-JUN-00. If you omit the century, zeros are entered for the century. In this example, if you enter 26-JUN-00, Banner expands the date to 26-JUNE-0000, not 26-JUN-2000.

10.0 Gender

10.1. General

Gender information is maintained for federal and state reporting purposes.

10.1.1. Gender

CODE	DESCRIPTION	EXPLANATION
M	Male	A male person (man or boy)
F	Female	A female person (woman or girl)
N	Not Available	The gender information is not available or cannot be determined from the name (e.g. Chris, Pat, Kayon, etc.)

A gender code is required for all persons in the Banner system.

11.0 Social Security Number (SSN)

11.1. General

The Social Security Number field in Banner is labeled: SSN/SIN/TIN

EIU's policy is that only a U.S. SSN/SIN/TIN will be entered into this field.

A U.S. social security number is required for all Eastern Illinois University employees and independent contractors. It is preferred that students disclose their social security number, but it is only required for students applying for financial aid or employment. Social security number is an optional data element for all other constituents of the university.

Enter the entire 9-digit U.S. Social Security number, omitting dashes and spaces between numbers (e.g. 123456789).

A person must present a copy of his or her social security card in order to have his/her social security number changed within Banner. Professional judgment should be used when making corrections to social security numbers based on error at initial entry.

Students will direct all non-self service changes to the Records Office. Current and retired faculty and staff will direct all change requests to Human Resources. Faculty/staff who are also students may direct all their change requests to Human

Resources. Donors and alumni will direct all non-self service changes to Alumni Services. Vendors will direct their changes to the Business Office.

12.0 Date of Birth

12.1. General

A date of birth is required for all EIU employees, requested but not required for students, and optional for alumni, friends, and donors of the University. It is preferred that students disclose their date of birth, but it is only required for students applying for financial aid or employment.

12.2. General Standards

A date of birth will be entered into Banner in the MM/DD/CCYY format. Banner will display the date as DD-MON-CCYY. If no date of birth is available leave the field blank.

Example:

Date of birth entered as:	11/20/1970
Will display as:	20-NOV-1970

12.3. Guidelines

Students will direct all non-self service changes to the Records Office. Current and retired faculty and staff will direct all change requests to Human Resources. Faculty/staff who are also students may direct all their change requests to Human Resources. Donors and alumni will direct all non-self service changes to Alumni Services. Vendors will direct their changes to the Business Office.

A copy of the birth certificate, passport, or driver's license may be required with all date of birth change requests. Professional judgment should be used when making corrections to dates of birth based on error at initial entry.

13.0 Marital Code

13.1. General

Marital status is required for all EIU students applying for financial aid and optional for all other constituents of the university.

13.2. General Standards

13.2.1 Marital Code

CODE	DESCRIPTION	EXPLANATION
D	Divorced	Legally Divorced
P	Partner	Not married but considered a partner
M	Married	Legally Married
L	Separated	Legally Married, but separated
S	Single	Single
U	Unknown	Marital status is unknown
W	Widowed	Widowed, and not remarried

13.3. Guidelines

Students will direct all non-self service changes to the Records Office. Current and retired faculty and staff will direct all change requests to Human Resources. Faculty/staff who are also students may direct all their change requests to Human Resources. Donors and alumni will direct all non-self service changes to Alumni Services. Vendors will direct their changes to the Business Office.

Professional judgment should be used when making corrections to marital status based on error at initial entry.

A copy of the marriage license or divorce decree may be required relative to marital status change requests.

14.0 Race/Ethnicity Codes

14.1. General

Race/Ethnicity of U.S. citizens/resident alien is tracked for purposes of federal and state reporting requirements. Ethnicity of non-U.S. citizens/non-resident aliens is not maintained in this field.

14.2. General Standards

14.2.1. Ethnicity

<u>Ethnicity (Old)</u>	<u>Ethnicity Question (New)*</u>	<u>Race (New)</u>
00 Unknown/Not Reported American Indian/Alaskan	None	0 Unknown/Not Reported
01 native	Not Hispanic or Latino	1 American Indian or Alaskan native
02 Black, Non-Hispanic	Not Hispanic or Latino	2 Black or African American
03 Asian/Pacific Islander	Not Hispanic or Latino	3 Asian
04 Hispanic	Hispanic or Latino	4 Unknown/Not Reported
05 International**	None	5 Unknown/Not Reported
06 White, Non-Hispanic	Not Hispanic or Latino	6 White

*Individuals are asked to designate ethnicity as: **Hispanic or Latino** (A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.) or **Not Hispanic or Latino**.

**Refer to Citizenship, Residence, and/or Visa Type fields for International persons

14.3. Guidelines

Enter one of the above race/ethnic codes for all persons.

15.0 Deceased Information

15.1. General

A change in deceased status requires verification; documentation may be required.

15.2. General Standards

All population selections for communication purposes must search for, and exclude, deceased persons.

Mark if the employee/student is deceased. Enter the date of death, if known. When date of death is unknown the first date of the month of the year of notification should be entered in deceased date field.

The message “DECEASED” shows up on any forms with the ID in the Key Information.

15.3. Guidelines

If you receive notification that a person has passed away, direct the next of kin to the appropriate office. Then using email, notify all of the Data Custodians for each Banner module. Include the following information in your email:

Name of Person
Banner ID
Date of Death (if known)
How you found out about it

16.0 Citizenship and International Persons Information

16.1. General

Citizenship is required information for students and employees at EIU. Additional information, such as country or citizenship and visa status, is required for any person who is not a citizen of the United States.

Citizenship and related information is maintained by the following offices:

Human Resources	EIU faculty and staff
International Programs	Non-resident aliens applying as students
Admissions	U. S. Citizens and Resident aliens applying as undergraduate students
Graduate School	U. S. Citizens and Resident aliens applying as graduate students
International Programs	Non-resident aliens after they enroll. Also tracks information on certain non-citizens in the area who are not associated with EIU.
Records Office/Enrollment Management	U. S. Citizens and Resident aliens after they enroll.
Alumni Services	Donors and alumni who are not EIU employees, students, or student applicants.

Any changes to citizenship or visa information must be coordinated with the appropriate offices.

16.2. General Standards

16.2.1. U.S. Citizenship Type

Enter a person's citizenship using the following values:

Banner Code	Description
Y	Citizen
N	Non-citizen
R	Resident Alien
U	Unknown
I	Undocumented
NR	Non-resident alien

Citizenship is used in IPEDS reporting for Planning and Institutional Studies.

16.2.2. Country of Citizenship

The country codes are the same as those used for addresses.

16.2.3. Visa Status

Visa status is maintained for all non-U.S. citizens.

16.3. Guidelines

If the person is a student or an employee, this information is required. If a person is in the Advancement module and not a student or an employee, this field will contain the letter "U" to indicate that the U.S. citizenship is unknown.

17.0 Veteran Information

17.1. General

The following offices maintain veteran information:

Civil Rights/Human Resources	Faculty and staff of EIU
Financial Aid	Students

17.2. General Standards

17.2.1. Veteran File Number

Veteran File Number is currently maintained for students by Financial Aid.

17.2.2. Veteran Category (HR Module)

None	Non-Veteran
Other Eligible Veteran Only	Other Eligible Veterans that did not serve in Vietnam
Vietnam Veteran Only	Eligible Veterans
Both Vietnam & Other Eligible Veteran	Vietnam veterans who meet the criterion for Other Eligible Veterans

17.2.3. Veteran Information (Student Module)

CODE	VETERANS' STATUS TITLE
0	Non-Veteran
1	Chapter 30
2	Chapter 32
3	Chapter 34
4	Chapter 35
5	Chapter 38
6	Chapter 106

17.3. Guidelines

Any changes to veteran information must be coordinated with the appropriate offices.

18.0 Relationship Codes

18.1. General

The relationship code is maintained on the emergency contact and guardian information forms within the general person module. The relationship codes can be found in Appendix D.

19.0 Religion Codes

19.1. General

The University will not maintain religious data in the Banner System.

20.0 Driver's License Information

20.1. General

Human Resources maintains driver's license information if required for the position.

Financial Aid may also collect driver's license numbers from the filing of FAFSA, but these do not become part of the student record.

20.2. General Standards

Enter the driver's license number as it appears on the license. Enter the state which issued the license in the state field.

21.0 Letter Names

21.1. General

The names of letters created within any module of Banner are stored in a common validation table. Letter names are 15 characters.

21.2. General Standards

In order to avoid confusion as to the owner of a letter defined within Banner, the following prefixes will be used by offices when defining a letter name on Banner:

ADM_	Office of Admissions
ADV_	Alumni Services/Development/Foundation
FA_	Office of Financial Aid
BUS_	Business Office
HR_	Human Resources
PR_	Payroll
REC_	Records Office
SA_	Student Accounts
BUD_	Budget Office

22.0 Quickflow Names

22.1. General

The names of quickflows created within any module of Banner are stored in a common validation table.

22.2. General Standards

In order to avoid confusion as to the owner of a quickflow defined within Banner, the following prefixes will be used by offices when defining a quickflow name on Banner:

FN	Finance – Accounting Services
AD	Office of Admissions
AV	Alumni Services/Development/Foundation
AR	Student Accounts
HR	Human Resources
PY	Payroll
RG	Records Office
FA	Student Financial Aid

23.0 Pop Selection Names

23.1. General

The names of pop selections created within any module of Banner are stored in a common validation table.

23.2. General Standards

In order to avoid confusion as to the owner of a pop selection defined within Banner, the following prefixes will be used by offices when defining a pop selection name on Banner:

FN	Finance – Accounting Services
AD	Office of Admissions
AV	Alumni Services/Development/Foundation

AR	Student Accounts
HR	Human Resources
PY	Payroll
RG	Records Office
FA	Student Financial Aid
BU	Budget

24.0 Holds, Comments and Information Viewable on the WEB

24.1. General

Information entered on the hold form or comment screens should be considered with care since this type of information will be a part of a person's permanent record. The information may not be derogatory in any way, but should be descriptive enough to be readily understood. The same caution should be exercised with any information that may be viewable on the web.

25.0 Table Management

25.1. Table Management Definition

Table Management refers to the process of authorizing, approving, and making changes to validation tables in Banner. Tables may be specific to one Banner system or they may be cross-functional and shared. Tables owned solely by one Banner system are managed and maintained by the Data Custodians for that area and updates to these tables do not require approval from the Data Custodian Group or Steering committee. Changes to shared validation tables require review and approval by the Data Custodians. The changes to General System validation tables require review and approval by the Data Custodians.

25.2. Procedure for Code Value Changes in Shared Validation Tables

25.2.1 New code values are presented to the appropriate Data Custodian with the explanation of need along with a plan for the implementation and testing. Testing is required before moving the codes to PROD.

25.2.2 New code values are reviewed by the Data Custodian's with ITS Technical Lead(s).

25.2.3 For "G" Tables (e.g. – GTVEMAL, GTVSRCE, GTVNTYP, etc.) all code value updates must be reviewed and accepted by the Data Custodian group.

25.2.4 For other shared tables all code value updates must be reviewed and accepted by the Data Custodian group.

25.2.5 When approvals are complete, tables may be updated and testing and implementation may proceed

26.0 Security Management

26.1. Security Management Definition

Security Management includes authorizing users' access to Internet Native Banner Forms and Views as well as ODS. This information is recorded in spreadsheets with defined classes, which are assigned to the various roles and users. Forms and views may be specific to one Banner system or they may be cross-functional and shared. Access to Forms and views owned solely by one Banner system are managed and maintained by the Data Custodian for that area and do not require approval from the Data Custodian Group or Steering Committee. Access to any Banner General Forms (e.g. – GUAIDEN, GAINST, GOINTL, etc) as well as to EIU's General Person forms (e.g. – APAIDEN, APAXREF, etc) requires review and approval by the General Data Custodian. Access to another area's forms and views is reviewed and approved by the appropriate Data Custodian.

26.2. Procedure for Authorizing Access to Forms, Views, Tables and Reports

26.2.1 Setup of a new Banner User is requested by the responsible Data Custodian to the ERP Security Administrator via the BanAccess form. The

NetID is set to match the user's email prefix. The requesting Data Custodian must provide the user's email prefix with the request.

26.2.2 Access requests are presented to the appropriate Data Custodian for approval and definition. The Data Custodian determines if the requestor has a demonstrated 'business need to know' and updates security spreadsheet for the Data Custodian's area of responsibility with reason for access, classes/roles/user/access info, and date info. The Data Custodian must include the user's email prefix, NetID, in the spreadsheet to expedite the security setup process.

26.2.3 For requests that require ODBC connection, the Data Custodian shall submit the request to the ODBC Coordinator for installation of ODBC drivers on the end user's computer.

26.2.4 If the access request involves Banner system Forms, Views, Tables, or Reports outside the requestors "home" area, the appropriate Data Custodian will review, record, and submit the request.

26.2.5 Direct table access for Object Access reporting should normally only be used by the Techs. For any exception, the request is made through the Data Custodian to be reviewed and approved by the Tech Lead, and then the Data Custodian responsible for the "home" area will submit the authorization on the BanAccess form to the Security Administrator.

26.2.6 The Supervisor initiates the appropriate training necessary based on the user's access (see Section 4 – Training Management).

26.2.7 The ERP Security Administrator implements approved BanAccess requests and provide the Trainer with NetID and default password.

26.2.8 The ERP Security Administrator will process security requests.

26.3. INB Password Maintenance

INB passwords are maintained with the form GUAPSWD or by using the Windows change password feature. EIU utilizes P-Synch to synchronize domain (Network) and Banner passwords. One password is used for both areas: access to your computer and access to any instance of Banner. This password is neither recorded nor accessible by anyone. If it is forgotten, the end-user notifies the ITS Help Desk for assistance in resetting the password via the CTRL ALT DEL feature of Windows.

26.4. Adjustments to and Termination of Security

It is the responsibility of the departmental Supervisor to notify the ERP Security Administrator when an employee resigns, retires or changes positions within the University. Any position change requires a new BanAccess form to be submitted to the appropriate Data Custodian.

26.5. Access Denial Appeal

Data Custodians are responsible to ensure that access to information is given on a “business need to know” basis. Positions (roles) need access to information in order to perform the duties of the position. Forms contain information and are included in security classes which are assigned to users. If a Data Custodian denies the request for form access to a particular security class, there are 3 steps in which the decision may be appealed.

26.5.1 The first appeal goes back to the Data Custodian who denied the first request. The staff member or supervisor must appeal the decision in writing to the Data Custodian, detailing exactly what information is needed and why the information is necessary for the security class.

26.5.2 The second appeal goes to the Data Custodian team with copies of the denial, accompanying information and a written statement of why the decision deserves reconsideration.

26.5.3 If consensus cannot be reached the third and final appeal goes to the Data Custodian’s supervisor (Vice President). The Vice-President, after receiving appropriate substantial information, will discuss the information from the parties involved. Decisions resulting from this appeal process are final.

26.5.4 At the conclusion of each appeal level a written statement will be sent to the user.

27.0 Training Management

The training plan is located under the EISE Project Section on the Banner website.

28.0 Banner Upgrades Management

The Data Custodian group, in conjunction with the ITS staff, coordinates the review, evaluation, testing and implementation of an upgrade.

Test Plans

Each Data Custodian and Technical lead is responsible for developing a test plan for each business function their functional area. This plan will assist the testing of new releases and new versions of Banner, including cross-functional testing.

28.1. Process for Banner Patches

Module leads/Data Custodian and technical leads should monitor the listservs for patch updates from Sungard. Only patches affecting EIU or that are a prerequisite for the installation of a needed patch will be applied.

Upon identification of a patch that must be installed, the technical lead:

- notifies the Database Administrator via email listing the patch and priority of installation
- reviews EIU modifications/enhancements for possible implications
- works with the Database Administrator to check the Banner release matrices for the dependencies necessary for the patch
- if other modules are affected, notifies the appropriate tech lead and data custodian

The Database Administrator will install the patch on the SEED and TEST environment and notify the tech lead when the installation is complete. Tech lead(s) will work with the Data Custodian to test the patch. Upon successful testing, the module leader will notify the Database Administrator via email the patch is ready for implementation. The Associate Director, Information Systems, module leaders, and Database Administrator will determine the implementation schedule for the remaining instances.

28.2. Process for functional interim (dot) releases

Vendor point releases (example: 8.1) must be older than 60 days before they will be selected for application. This will insure major bugs have been supplied patches by the vendor. The exception to this rule may be any release containing regulatory required functions. All patches available at the date of download of the point release (after 60 day waiting period) will be applied with the Point Release. These releases will follow a schedule as determined by the CFCG in consultation with ITS. A point release will not be applied in the same month as a Major Release.

The IT Assistant Manager will communicate the availability of the release and release documentation to the Data Custodians/Module Leads and Technical Leads. The point release application schedule will be set by the CFCG and ITS. The go live date must accommodate the 60 day wait period in addition to system software upgrades and the university calendar. The IT Assistant Manager will communicate the schedule for implementation of the point release to the Help Desk.

During the 60-day wait period, the Data Custodian will begin plans for testing the release. All release documentation should be reviewed in detail and test plans build based on critical business processes and changes to the point release. EIU modifications and enhancements to application software need to be considered in the test plans. Data Custodians/module lead will need to assimilate plans for training end users on the point release functions.

During 60 days leading to week 1:

- Tech leads start analyzing modules/enhancements that need to be carried forward and/or updated
- Step 1 – week 1:
 - Database Administrator will install the new release on SEED and build the TREL (test point release) environment by cloning the production environment and installing the point release
 - Patches available at time of point release download are applied to TREL
 - No changes will be made to production environments – ensures code that has not been tested with the new point release will not be promoted to the production environment
- Step 2 – week 2:
 - Programmers analyze the ramifications of the new release on any objects created or modified for Banner. The objects are prepared and carried forward into the TREL environment
- Step 3 – week 3, 4:
 - Data Custodians/module leaders and IT staff begin testing to ensure major functionality of the release is working properly and that any EIU enhancements or modifications to Banner are working properly
 - Departmental users of each module should test their normal processes and reports, and any new functionality that may be implemented
 - Data Custodians/Module leaders asked to sign off that release is ready for move to production
 - Signoff occurs by emailing the Associate Director, Information Systems prior to the date the point release will be applied

- Point release training occurs to prepare users for the new functions of the release
- Over weekend, release is applied to Production environment
- Test environment is recreated from the Production environment
- Development environment is recreated from the Production environment on schedule developed by Database Administrator and tech leads
- Step 4 – week 5:
 - New point release is in production on Monday
 - Change freeze is removed from production and test environments

28.3. Process for major Banner releases (new versions)

Major releases (ex: 8.0) must be older than 90 days before they will be selected for application. This should help to insure major bugs have been identified and patches supplied by the vendor.

The Database Administrator will be notified of major release availability via the BPOST listserv or other vendor announcement such as email. The IT Assistant Manager will communicate the availability of the release and will release documentation to the Data Custodian/Module Leads and Technical Leads. The release application schedule will be set by the CFCG and Database Administrator. The go live date must accommodate the 90 day wait period in addition to system software upgrades and the university calendar. The release application schedule will be communicated to the module teams by the module leads. The IT Assistant Manager will communicate the schedule for implementation of the release to the Help Desk.

During the 90-day wait period, the Data Custodians will begin plans for testing the release. All release documentation should be reviewed in detail and test plans built based on critical business processes and changes to the release. EIU modifications and enhancements to application software need to be considered in the test plans. Data Custodian/Module lead will need to assimilate plans for the training of end users on the release functions.

Following is the schedule for implementation of a new major release:

- Prior to week one: Tech leads start analyzing modules that need to be carried forward
- Step 1 – week 1, 2:
 - Database Administrators install new release on SEED
 - Data Custodians begin to finalize testing and training plans
 - Database Administer builds TREL (test release environment) by cloning PROD and applying the release over it

- Database Administrators lock down PROD and TEST to changes (no further changes/implementations till after implementation of new release)
- Patches that are available at the date of download of the release (after 90 day waiting period) are applied
- Two weeks are allowed for installation on SEED and build of TREL environment
- Step 2 – week 3, 4:
 - Programmers analyze the ramifications of the new release on any objects created or modified for Banner. The objects are prepared and carried forward into the TREL environment.
- Step 3 – week 5-10
 - By first day of week 5, all plans for testing and training should be finalized.
 - Assistant Manager (IT) will notify Data Custodian when TREL is ready
 - Release testing will begin by Data Custodians. They should test to insure the major functions of the release are working properly and test to insure the EIU enhancements or modifications to the software are working appropriately
 - Departmental users of each module should test their normal processes and reports, and any new functionality that may be implemented
 - The Data Custodians will then be asked to sign off that the release is ready for move to production
 - Signoff occurs by emailing the Associate Director, Information Systems prior to the date the major release will be applied
 - During week 10, PROD is cloned to PPRD and new release is installed on PPRD
- Step 4 – week 11:
 - Release training will occur so users of application are prepared to operate new functions of release on the following Monday. Over the weekend, the release is applied to the PROD environment. Any synchronized code is promoted to the PROD environment from the TREL environment. On the first day of the 12th week, the release will be in the PROD environments
- Step 5 – week 12:
 - New release is in production on Monday.
 - The TEST environment is recreated from the Production environment.
 - New release is installed in TEST environment during this week
 - Change freeze is removed from production and test environments

Any changes to the schedule must be emailed to Associate Director, Information Systems, ITS and Database Administrator at least 5 work days before the requested downtime.

29.0 Duplicate Record Handling

A multiple ID/PIDM is defined as two or more PIDM records for one individual.

It is important that creation of a general person not produce a duplicate PIDM since the cleaning of data is not an easy task. Common matching is required for any staff member who will be building the general person record. Important data could be lost so attention to detail should be strictly followed.

If an entry error is found (person or vendor) which has been created twice under two different Key ID numbers in Banner, follow the procedure outlined below:

- STEP 1. The person who discovers the duplicate PIDM should contact their Banner module CORE team representative immediately. If the CORE team representative does not have access to make such a change, they must contact the appropriate CORE team representative. A duplicate PIDM is defined as the incorrect PIDM. The CORE team will be composed of one representative from each of the five modules and each representative will assign a designee as back-up. The five modules include Finance, Human Resources, Student, Financial Aid, and Advancement.
- STEP 2. The CORE team representative should follow the common matching criteria and identify the incorrect or duplicate PIDM. Once it is identified the representative is responsible for changing in Banner the “E” or Key ID and Name and Address (if needed) as follows:

Change the “E” ID to:

Example: E66087987 incorrect ID

Change to: XXX087987 (always enter three XXX’s)

Change the Name in the Middle name field to:

Example: Michael

Change to: DUPLICATE

For non-person records, DUPLICATE should be added to the end of the Non-Person Name rather than the Middle name field.

Example: WALMART

Change to: WALMARTDUPLICATE

Address:

The appropriate representative for an address change should be contacted by the initiating CORE team member as follows:

If the duplicate PIDMs is a student contact the CORE team representative from the Student module; if an employee, the Human Resources representative; if a vendor, the Finance representative; and if an alumni, the Advancement representative should be contacted.

Change the first line of the appropriate addresses to read as follows:

Add today's date in the "To Date" field

Check the "Inactive Status" box on all the appropriate address(s)

Change the first line of the current address(s) to read DO NOT USE – see "new ID"

If one of the duplicate PIDMs is a vendor record the Finance module representative should terminate and inactivate the vendor record.

It is not always possible to immediately determine which PIDM is correct and which is incorrect. In the case of a vendor, the decision may need to be based on data attached to the PIDM. An ITS representative should be contacted to run the process that shows what data is attached to each PIDM.

- STEP 3. A hold should be put on the duplicate Student PIDM account using the SOAHOLD form for Student records. This prevents further transactions from occurring against the duplicate PIDM record. Please contact the Office of the Registrar to place the SOAHOLD. Financial Aid will place their own packaging and disbursement holds via ROAHOLD.
- STEP 4. The initiating CORE team representative sends an e-mail message to the CORE team reporting the duplicate PIDM. The message should contain the name of the entity and the two Net ID numbers in Banner. The e-mail should specify which number is correct and which is incorrect. The message should also include a deadline date within a five day period for all data to be transferred.

- STEP 5. Each CORE team representative or designee is responsible for moving any and all data under their domain from the incorrect number to the correct number prior to the set deadline date. Once data has been reviewed and moved if needed, each CORE team representative should send an e-mail response to the initiating CORE member prior to the deadline date.

Some data, such as paid invoices, cannot be transferred by functional users. In this case, an IT representative will need to transfer the data before scrubbing the incorrect PIDM.

- STEP 6. Once all the CORE team members have notified the initiating CORE team representative that all data has been reviewed or transferred if needed, the initiating representative should provide their ITS representative with the duplicate record information so that it can be deleted from the database within 5 days.

Some data cannot be moved but must be merged with a process created by ITS.

30.0 Other Data Custodian Duties

30.1. Documentation Review

Ensure that function-specific data standards, processes, and training materials are documented and reviewed at least annually.

30.2. Reporting to Steering Committee

APPENDIX A

Name Prefix and Suffix Table

The following list of prefixes is not exhaustive. See the Abbreviation section of Webster's Dictionary for additional options.

Dr	Doctor
Fr	Father
Gov	Governor
Hon	Honorable
Judge	Judge
Miss	Miss
Mr	Mister
Mrs	Mistress
Ms	Miss or Madame
Pres	President
Prof	Professor
Rabbi	Rabbi
Rep	Representative
Rev	Reverend
Sen	Senator

If a suffix is known, use the following guidelines. This list is not exhaustive. See the abbreviation section of Webster's Dictionary for additional choices.

Jr	Junior
Sr	Senior
II	
III	
IV	

APPENDIX B

University Offices, Department Titles and Abbreviations

Department Name	Standard for Campus Mailing Address
Academic Advising/CASA	CASA
Academic Affairs/VPAA/Provost's Office	VPAA
Administrative Services – Physical Plant	Administrative Services – Physical Plant
Office of Undergraduate Admissions	Admissions Office
Affirmative Action	Civil Rights and Diversity
African-American Studies Department	African-American Studies Dept
Alumni Services	Alumni Services
Annual Fund	Annual Fund
Art Department	Art Dept
Arts and Humanities	CAH
Benefits Office	Benefits Office
Biological Sciences Department	Biological Sciences Dept
Bookstore, University Union	Bookstore, University Union
Booth Library/Library Services	Booth Library
BOT Degree Program/BA General Studies Degree Program	General Studies Degree Program
Budget Office	Budget Office
Building Services	Building Services
Bursar/Cashier	Cashier Office
Business and Applied Sciences	LCBAS
Business and Technology Institute	Business and Technology Institute
Business Office	Business Office
Business Services/Treasurer/Finance Administration/Business Affairs	VPBA
Campus Recreation	Campus Recreation
Campus Scheduling	Campus Scheduling
Career and Organizational Studies	Career and Organizational Studies
Career and Technical Education	Career and Technical Education
Career Planning and Placement Center/Career Services	Career Services
Cashier Office	Cashier Office
Catering	Catering
Center for Academic & Technology Support	CATS
Center for Academic Support and Achievement	CASA
Central Receiving	Central Receiving
Central Stores	Central Stores
Chemistry Department	Chemistry Dept
Child Care Resource and Referral	Child Care Resource and Referral
Civil Rights and Diversity	Civil Rights and Diversity
Civil Service Classification and Pay Administration	Civil Svc Classification and Pay Admin
Civil Service Examinations	Civil Service Examinations
College of Arts & Humanities	CAH

College of Continuing Education	Continuing Education
College of Education & Professional Studies	CEPS
College of Sciences	COS
Commencement Office	Commencement Office
Communication Disorders and Sciences	Communication Disorders and Sciences
Communication Studies Department	Communication Studies Dept
Copy Express, University Union	Copy Express, University Union
Counseling & Student Development	Counseling and Student Development
Counseling Center	Counseling Center
Daily Eastern News	Daily Eastern News
Office of Philanthropy	Office of Philanthropy
Disability Services	Disability Services
Early Childhood/Elementary/Middle Level Education	EC/ELE/MLE
Eastern Illinois University	EIU
Eastern Illinois University Foundation	EIU Foundation
Economics Department	Economics Dept
Education & Professional Studies	CEPS
Education Abroad/Study Abroad	Study Abroad Office
Educational Administration	Educational Administration
Educational Psychology and Guidance Department	Educational Psychology and Guidance
Employee and Labor Relations	Employee and Labor Relations
Employment, Civil Service	Employment, Civil Service
Employment, Faculty and A-P	Employment, Faculty and A-P
Employment, Student	Employment, Student
English as a Second Language	English Language Center
English Department	English Dept
Enrollment Management	Enrollment Management
Environmental Health and Safety	Environmental Health and Safety
External Relations	VPER
Facilities Planning and Management	Facilities Planning and Management
Faculty Development	Faculty Development
Financial Aid Office	Financial Aid Office
Foreign Languages Department	Foreign Languages Dept
Foundation Office	EIU Foundation
Gateway Program	Gateway Program
General Counsel, Office of	General Counsel
Geology/Geography Department	Geology/Geography Dept
Gerontology Program, Masters	
Governmental Relations – VPER	Governmental Relations
Graduate Business Studies	LCBAS – MBA
Graduate School	Graduate School
Grants and Research	Research and Sponsored Programs
Grants, College of Education and Professional Studies	Grants – CEPS
Graphics and Visual Arts	Graphics and Visual Arts
Health Education Resource Center	Health Education Resource Center
Health Service	Health Service

Health Studies Department	Health Studies Dept
HECA Project	HECA Project
History Department	History Dept
Home Economics	School of FCS
Honors College	Honors College
Housing Office	Housing Office
Human Resources	Human Resources
Information Technology Services	Information Technology Services
Intercollegiate Athletics	Intercollegiate Athletics
Intercollegiate Sports, Compliance/Academic Advising	
Intercollegiate Sports, Equipment	
Intercollegiate Sports, Information/Marketing	
Intercollegiate Sports, Men's	
Intercollegiate Sports, Training Room/Strength Conditioning	
Intercollegiate Sports, Women's	
Internal Auditing	Internal Auditing
International Programs	International Programs
Journalism Department	Journalism Dept
Judicial Affairs (Student Conduct)	Judicial Affairs
Labor Relations	Labor Relations
Legal Counsel	General Counsel
Mail Services	Mail Services
Mathematics and Computer Science Department	Math and Comp Science Dept
Media Relations	Media Relations
Media Services/Media Center	Media Center
Military Science Department	Military Science Dept
Minority Affairs, Office of	Minority Affairs
Minority Teacher Identification and Enrichment Program	HECA Project
Music Department	Music Dept
Orientation Office	Orientation Office
Panther Card Office	Telecommunications Office
Payroll Office	
Peace Meal	Peace Meal
Philosophy Department	Philosophy Dept
Physical Education Department	Physical Education Dept
Physics Department	Physics Dept
Placement Center	Career Services
Planning and Institutional Studies	Planning and Institutional Studies
Police/University Police	Police Department
Political Science Department	Political Science Dept
President's Office	President's Office
Printing Center	Copy Express
Procurement, Disbursement and Contract Services	Procurement, Disbursement and Contract Services
Property Management and Set-up	
Provost's Office	VPAA

Psychology Department	Psychology Dept
Radio and Television Center	WEIU
Reading Center	Reading Center
Records Management	
Office of the Registrar and Enrollment Management	Office of the Registrar and Enrollment Management
Recreation Administration Department	Recreation Administration Dept
Registration Office	Registration Office
Renovations/Alterations Projects	
Research	Research and Sponsored Programs
ROTC	Military Science Dept
School of Business	School of Business
School of Family & Consumer Sciences	School of FCS
School of Technology	School of Technology
Sciences	COS
Secondary Education and Foundations	Secondary Education and Foundations
Senior Nutrition Program	Peace Meal
Social Sciences	History-Social Sciences
Sociology-Anthropology Department	Sociology-Anthropology Dept
Special Education	Special Education
Speech Communication	Communication Studies
Speech-Language-Hearing Clinic	Speech-Language-Hearing Clinic
Student Accounts	Student Accounts
Student Affairs/VP of Student Affairs	VPSA
Student Conduct	Judicial Affairs
Student Life Office	Student Life Office
Student Publications	Student Publications
Student Teaching	Student Teaching Dept
Study Abroad	Study Abroad Office
Summer Camps and Conferences	Housing Office
Tarble Arts Center/Fine Arts-TAC	Tarble Arts Center
Telecommunications Office	Telecommunications Office
Telefund Office	Annual Fund
Testing Services	Testing Services
Textbook Rental Services	Textbook Rental Services
Theatre Arts Department	Theatre Arts Dept
Training and Development	
Transfer Relations	Enrollment Management
Treasurer	VPBA
TRIO Program	TRIO Program
University Marketing and Communications	University Marketing and Communications
University Foundations	CASA-University Foundations
University Newsletter	University Newsletter
University Publications	University Publications
University Theatre	University Theatre
University Union	University Union
Web-Based Instruction	CATS
WEIU	WEIU
Women's Resource Center	Women's Resource Center

Women's Studies	Women's Studies
Work Control Requests	

APPENDIX C

NANP Plan for International Numbers

Country	Area Code
Anguilla	264
Antigua	268
Bahamas	242
Barbados	246
Barbuda	268
Bermuda	441
British Virgin Islands	284
Canada	Multiple
Cayman Islands	345
Dominica	767
Dominican Republic	809
Grenada	473
Guam	671
Jamaica	876
Montserrat	664
Northern Marianas Islands (Saipan, Rota, and Tinian)	671
Puerto Rico	787
St. Kitts/Nevis	869
St. Lucia	758
St. Vincent and Grenadines	784
Trinidad and Tobago	868
Turks and Caicos Islands	649
U.S. Virgin Islands	340

APPENDIX D

Relationship Codes

CODE	DESCRIPTION
A	Ex-spouse
B	Brother
C	Child
F	Father
G	Grandparent
M	Mother
N	Neighbor
O	Relative
P	Spouse
R	Friend
S	Sister
U	Guardian
X	Significant Other

APPENDIX E

BUSINESS WORD ABBREVIATIONS

Abroad	Abrd	Distributing	Distrg	Organization	Orgn
Absences	Abs	Distribution	Distrbn	Organizational	Orgnl
Academic	Acad	Division	Div	Orientation	Orient
Academic Support (Program Code)	ACSU	Early Childhood, Elementary Education and Middle Level Educations	EC/ELE/ MLE	Physical	Phy
Academy	Acdmy	Earnings	Earn	Planning	Plang
Account	Acct	East	E	Portfolio	Prtf
Accountant	Acct	Education(al)	Educ	Processing	Procg
Accounting	Acctg	Educational	Eductl	Professional	Profl
Accounts Payable	A/P	Eighth	8 th	Program	Pgm
Accounts Receivable	A/R	Elementary	Ele	Project	Proj
Accreditation	Accrdtn	Elevator	Elev	Public Svc (Pgm Code)	PUSV
Addition	Addn	Eleventh	11 th	Publications	Publ
Adjuster	Adjter	Emergency	Emer	Publishing	Pubg
Administration	Admin	Enterprises	Enterp	Receivables	Rec
Advancement	Advnc	Equipment	Equip	Regional	Regl
Advertising	Advtsng	Executive	Exec	Renovation	Renov
Agency	Agcy	Extension	Ext	Rental	Rent
Alcohol	Alcoh	Facilities	Fac	Research	Resch
Alumni	Alum	Facilities Planning and Maintenance	FPM	Research (Program Code)	Resh
America	Amer	Family	Fam	Restricted	Restrd
Apartment	Apt	Federal	Fed	Scholarship	Schol
Appraiser	Apprser	Fifth	5 th	Scholarship & Fellowship (Prgm Code)	SHFH
Appropriated	Appropd	Finance	Fin	School	Sch
Appropriation	Approp	First	1 st	Science	Sci
Architect	Archt	Foundation	Fndtn	Second	2nd
Assistant	Asst	Fourth	4 th	Seventh	7th
Associate	Assc	Fund	Fd	Sixth	6th
Association	Assn	General	Gen	South	S
Athlete	Ath	Geography	GEO	Special	Spl
Attention	Attn	Geology	GEOL	Speech Language and Hearing	SLH
Attorney	Atty	Government	Govt	Standard	Std
Auxiliary	Aux	Graduate	Grad	Student	Stu

Background	Bkgrd		Greater	Grtr	Student Svcs (Prgm Code)	STSV
Board	Bd		Group	Grp	Summer	Sum
Building	Bldg		Hotel	Htl	Support	Sup
Business	Bus		Incorporated	Inc	Technician	Teen
Center	Ctr		Information	Info	Technology	Tech
Center for Academic Support and Achievement	CASA		Institute	Inst	Tenth	10th
Central	Ctrl		Institution	Instn	Telefund	Telefd
Certified	Cert		Instruction (Program Code)	INST	Third	3rd
Circle	Cir		Insurance	Ins	Undergraduate	Undgrad
College	Clg		International	Intl	United	Untd
College of Arts and Humanities	CAH		Journal	Jrnl	University	Univ
College of Education and Professional Studies	CEPS		Laboratory	Lab	Upgrade	Upgd
College of Sciences	COS		Library	Lbry	Vice President	VP
College Work Study	CWS		Lumpkin College of Business and Applied Sciences	LCBAS	Vice President Academic Affairs	VPAA
Collegiate	Colg		Machine	Mach	Vice President Business Affairs	VPBA
Commission	Com		Maintenance	Maint	Vice President External Relations	VPER
Committee	Ctte		Management	Mgt	Vice President Student Affairs	VPSA
Communication	Comm		Manager	Mgr	Waivers	Wvrs
Communication Disorders and Sciences	CDS		Marketing	Mkt	West	W
Community	Cmnty		Masters of Business Administration	MBA	Wholesaler	Whslr
Company	Co		Material	Mtl	Service	Svc
Computer	Cmptr		Metropolitan	Metro	Services	Svs
Contractor	Contr		Middle	Mid	Society	Socty
Corporation	Corp		Miscellaneous	Misc	United States	US
Council	Cncl		National	Natl		

Counseling and Student Development	CSD		Ninth	9 th		
County	Cnty		North	N		
Court	Ct		Office	Ofc		
Degree	Deg		Operations and Maintenance	O&M		
Department	Dept		Operations and Maintenance (Program Code)	OAMP		
Development	Dev		Opportunity	Opp		
Director	Dir					
Distinguished	Dist					

APPENDIX F

Data Standards Change Request Form

The Data Standards Change Request Form is to be used to request changes to the Data Standards document in use at EIU. The form asks for justification for the change, what other area(s) will be impacted by the change, how will those other area(s) be affected, who will be the data steward for the proposed change, if applicable, and who will maintain the change, if applicable. The Functional Team generating a change request must get the signature of the Data Custodian representing that module. The Data Custodians will then consider the request and either incorporate the changes into the Data Standards Manual or return the request with any questions.

Standards will not be created for things we ‘think’ might be needed. When a need is realized, as justified by the Data Standards Change Request Form, then it will be added to the Data Standards and distributed for use.

SOATBRK	Student Term Break Form	XS	X				
STVACCG	Activity Category	X	X	XS		X	
STVACTC	Activity Code	X		XS			
STVACTP	Activity Type	X		XS			
STVACYR	Academic Year Code	XS	X				
STVADMT	Admission Type	XS	X				
STVAPDC	Admissions App Decision Codes	XS	X				
STVAPST	Admission Application Status	XS	X				
STVASCD	Room Assignment Status	XS	X				
STVASRC	Address Source	XS		X	X		
STVASTD	Academic Standing	XS	X				
STVATYP	Address Type Code	XS	X	X	X	X	
STVBLDG	Building	XS	X	X			
STVCAMP	Campus Code	XS	X	X			
STVCIPC	CIPC Code	XS				X	
STVCITZ	Citizen Type Code	XS	X	X		X	
STVCLAS	Class Code	XS	X				
STVCNTY	County Code	XS	X	X	X	X	
STVCOLL	College Code	XS	X	X		X	
STVCOMT	Committee/Service Type	X				X	
STVCTYP	Contact Type	XS	X				
STVDAYS	Days of the Week	XS	X			X	
STVDEGC	Degree Code	XS	X	X		X	
STVDEGS	Degree Status	XS	X				
STVDEPT	Department Code	XS		X			
STVDIVS	Division	X	X			XS	
STVDLEV	Degree Level	XS				X	
STVDPLM	Diploma Type	XS	X				
STVEMPT	Employment Type	XS	X				
STVESTS	Enrollment Status	XS	X				
STVETHN	Ethnic Code	XS	X	X		X	
STVETYP	Event Type	X		XS			
STVGEOG	Geographic Region Division	XS		X			
STVGEOG	Geographic Region Code	XS		X			
STVGMOD	Grading Mode Code	XS	X				
STVHAPS	Housing Application Status	XS	X				
STVHLDD	Hold Type	XS	X				
STVHOND	Departmental Honors Code	XS	X	X		X	
STVHONR	Institutional Honors Code	XS		X			
STVINIT	Initials Code	XS		X			

STVLANG	Language	XS				X	
STVLEAD	Leadership	X		XS			
STVLEVL	Level Code	XS	X			X	
STVLGCY	Legacy	XS		X		X	
STVMAJR	Major/Minor/ Concentration Code	XS	X	X		X	
STVMDEQ	Medical Equipment Code	X				X	
STVMEDI	Medical Code	X				X	
STVMRCD	Meal Rate	XS	X				
STVMRTL	Marital Status Code	X	X	X		XS	
STVMSCD	Meal Assignment Status	XS	X				
STVNATN	Nation Code	XS	X	X	X	X	
STVORIG	Originator Code	X		X			
STVPENT	Port of Entry Code	XS				X	
STVRATE	Student Fee Assessment Code	XS	X				
STVRDEF	Building/Room Attribute	XS	X				
STVRELG	Religion Code	XS		X		X	
STVRELT	Relation Code	X				XS	
STVRMST	Room Status	XS	X				
STVRRCD	Room Rate	XS	X				
STVRSTS	Course Registration Status	XS	X				
STVSBGI	Source/Background Institution	XS	X	X		X	
STVSITE	Site	XS	X				
STVSPON	International Student Sponsor	XS	X				
STVSTAT	State/Province Code	XS	X	X	X	X	
STVSTST	Student Status	XS	X				
STVTADM	Test Score Administration Type	XS	X				
STVTELE	Telephone Type	XS	X	X	X	X	
STVTEPR	Test Purpose	XS	X				
STVTERM	Term Type	XS	X				
STVTESC	Test Code	XS	X				
STVTSRC	Admission Test Score Source	XS	X				
STVVETC	Veteran Type	XS	X				
STVVVYP	VISA Type	XS				X	
STVWDRL	Student Withdrawal Status	XS	X				
TSACONT	Contract Authorization Form	XS	X				
TSADETC	Detail Code Control Form	XS	X				

TSAEXPT	Exemption Authorization Form	XS	X				
TVVAUTH	Authorization Validation Form	XS	X				
TTVBILL	Billing Code	XS	X				
TTVDCAT	Detail Category	XS	X				
TTVPAYT	Payment Type	XS	X				
TTVSRCE	Charge/Payment Detail Source	XS	X				
GURAPAY	Accounting Feed AP Table	X			XS	X	
GURFEED	Finance Transaction Input Table	X			XS	X	



GLOSSARY

Non-directory/personally identifiable – Private information that is considered confidential and should not be made public.

Common Matching – Common matching is a process that will help your institution create and manage basic person information. The Common Matching process checks for existing identification records before a new one is added to the database.

PIDM - an identification number that is unique to each person in the Banner database.

Duplicate PIDM - Each person or organization in the Banner database is assigned a PIDM. The phrase duplicate PIDM indicates that an individual or organizational record exists more than once with a different PIDM.

Division/Department Heads - Vice Presidents, Deans, Directors, Department Chairs, and/or other administrative personnel.

Display (Inquiry) - "Display" access enables the user to view, analyze, but not change EIU data. This may also be referred to as inquiry or query access.

Update - "Update" access provides both display and add/edit capabilities. This may also be referred to as maintenance access. Update capability is generally limited to users directly responsible for the collection and maintenance of the data.

Download/Upload - If data is downloaded to a personal computer or other device, it must be used and represented responsibly and accurately. Concerns or questions regarding the validity of downloaded data should be directed to the appropriate Data Custodian. If any data is downloaded and reports generated, they need to be labeled "Unofficial

Family Educational Rights and Privacy Act of 1974 (FERPA) – The Buckley Amendment – covers the privacy of all education and some medical records.

Health Insurance Portability and Accountability Act of 1996 (HIPPA) – Covers the privacy of personal health information

Gramm-Leach-Bliley Act of 1999 (GLBA) – covers the security of all non-public personally-identifiable financial information