Banner
General Person

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Introduction

Banner is an Enterprise Resource Program (ERP) and our Student Information System (SIS) from Ellucian. Banner has modules for different functional areas. The five main modules are Student, Finance, Financial Aid, Human Resources, and Information Access. A general module ties all of the functional modules together and contains General Person information, including ID number, name, address, and some biographical information which is shared by the other modules.

Banner is a collection of forms with imbedded instructions used to enter, modify, delete, and query data. Banner provides the screens and programs necessary to manipulate data. The data itself is stored in tables residing in an Oracle database. It is a relational database meaning that tables are linked together by means of an internal identification number, and, therefore, data redundancy is limited. One table might have a student's ID number and the course numbers that he/she is enrolled in. A separate table has the course numbers and the course descriptions. The course numbers would link the two tables together providing a course description for the courses a student is enrolled in. There are over several thousand tables in the Banner system.

Data Integrity

Purpose

These guidelines provide recommendations for establishing measures for the protection, access, and use of La Verne data that is electronically maintained on the Banner system. The guidelines should define the responsibilities of users who input and access that data. Divisions/departments may have individual guidelines that supplement, but do not replace or supersede these guidelines.

Data is a vital asset owned by La Verne and its colleges. All institutional data,

The Banner Access Request Form and instructions for completing it can be obtained from the

Data Owner

Data owners are those individuals responsible for the accuracy and completeness of data files in their areas. Data owners have two levels, Executive and Functional. Executive Data Owners are responsible for the overall policy and practice employed by university constituents when entering, modifying or deleting data. Functional Data Owners are also responsible for the maintenance and control of their Banner validation tables and rules tables, and knowing when these tables may be common to other modules. It is important that the Functional Data Owner is aware of progress on table builds, and should also be aware of what data can be cleaned (scrubbed), what data can be moved to Pre-Prod or Production, and what instance their team should be working in at all times. The DBA or Banner Security Administrator will communication with the Functional Data Owner on a frequent basis concerning these issues.

	Data Owner	
Area of Responsibility	**Executive**	**Functional**
General Module	Shared across group	
Student Module	Associate Provost Academic Affair	University Registrar
Finance Module	Associate Vice President, Finance & HR	Manager, Finance System

Advancement Module

Employee (including student employees) or	Employment Applicant Names only cannot be changed on Self Service. Names can only be changed by HR with appropriate documentation. Addresses can be changed on Self Service or by HR staff.
Student, Student Recruit or Student Applicant	Names cannot be changed on Self Service. Admissions, Recruiting, or Registrar can make name changes with appropriate documentation. Addresses can be changed on Self Service or by staff.
Financial Aid Applicant Only	Names cannot be changed on Self Service. Financial Aid can make name changes with appropriate documentation. Addresses can be changed on Self Service or by staff.
Vendor Only	Purchasing or Accounts Payable can make name and address changes. There is no Self Service for vendors.
Student and Financial Aid Recipient	Names cannot be changed on Self Service. Registrar or Financial Aid can make name changes with appropriate documentation. Addresses can be changed on Self Service or by staff.
Alumni Only	Names cannot be changed on Self Service. Address can only be changed by staff.
Employee or Business Vendor	Names cannot be changed on Self Service. Address can be changed by business office.

numbers can only be changed in rare cases where privacy or safety is a concern, and will be determined by the appropriate office on a case-by-case basis.

In addition, General Persons will have an assigned login that will be used for both email and network access. Format is first initial of first name + first 15 characters of last na

and followed by a middle name, place the single character in the first name field and the middle name in the middle name field.

First Name	Middle Name	Last Name
F	Scott	Fitzgerald w 4.394rBodyC -29.8970 T

Abbreviations are allowed for Co., Corp., Ltd. or Inc. when used after the name of a corporate entity. Other forms of abbreviation may be used if the business name does not fit in the field, ie. Dept. or Assoc.

Acronyms – Companies that are recognized by their acronyms should be entered using their acronym with no punctuation (e.g., IBM, SCT, and ITT). Should there be a chance that a search would not produce the name, an alternate name should be created to ensure that a user can find the company using either name.

Non Person Name Changes

Non Person Name change policies should be followed with regard to required documentation. Informed professional judgment must be used to determine what constitutes a name correction (data entry spelling error) rather than a name change. For official non person name changes a W9 is required.

Address Standards

Multiple addresses can be entered for a person or vendor using different address types. When various reports are run, address type can be selected so the correct address is used. Address standards have been established cooperatively so that address types are used consistently. Banner does not restrict address updates by functional area. Therefore, it is critical for the user to ensure that the most current appropriate address is available for all areas.

Employees (including student employees) MUST HAVE active MA address.

Address Types (Remove and add the new types in Banner)

AP	Accounts Payable Address
AS	Advancement Seasonal
BI	Billing Address
BU	Business Address
BX	ULV Box
DI	Diploma Mailing Address
EM	Emergency Address
FA	Father's Address
GB	Grant Billing Address
GU	Guardian
LK	Last Known Address
MA	Mailing Address
MO	Mother's Address

PA	Parent's Address
PI	Preparer Address
PM	Permanent Address
PO	Purchasing Address
PY	Payroll
SU	Summer Address
TX	Tax Address
XX	Reserved for TGRFEED Use Only

1. Street Standards

All information is to be entered using **mixed case**.   Use standard abbreviated street designators without punctuation:

Correct

Information Given:
John F Smith
PO Box 200, 100 Major St.
New York, NY 10001

Enter as:

Mr. John Smith
100 Major St
PO Box 200   (enter PO Box with no punctuation)
New York NY 10001

2. **Unit Numbers such as Apartment, Building, Suite, etc.**

If unit type is known, use one of the following designators:

Correct	Description
Apt	Apartment
Bldg	Building
Rm	Room
Ste	Suite
Dept	Department

If unit type is not known, leave blank. Enter on same line as address.

Correct	Incorrect
1234 Main X-104	1234 Main # X-104

3. **Compass Directions**

Compass directional words may be abbreviated if they are not the street name. Do not use punctuation. For example:

Correct	Incorrect
102 N South St	102 N. South St.
4929 W Arizona St NW	4929 W. Arizona St. N.W.

4. **City Standards**

All information is to be entered using **mixed case** (standard combination of upper and lower case letters). **Do NOT** abbreviate unless you are limited by space.

Correct	Incorrect
Colorado Springs	Colo Springs

PC   Personal Cell

Address Changes

Address changes should be made by the appropriate office, optionally making note of the change source from the valid values. Some address type changes can be made on Self Service, please see the section above.

Biographical Standards

These should be entered as supplied by the student/employee, using the valid value tables associated with each field. They are:

Gender
   M or F or Not Available

Birth Date

Enter the date of birth to accurately display age calculation.
Citizenship

Y Citizen
N Non-Citizen

Ethnicity
A American Indian/Alaskan Native
B Black
C Caucasian
H Hispanic
N Non Resident Alien
O Other
P Asian/Pacific Islander
U Unknown
R Declined to Answer

New Ethnicity
Not Hispanic or Latino
Hispanic or Latino
None

Race Code

AAI American Indian/Native Alaskan

BAF Black/African American
PAC Hawaiian/Pacific Islander
WHI White

Marital Status
1 Unmarried
2 Married
3 Separated
4 Unknown
5 Refused to Answer
6 Divorced
7 Widowed
8 Common Law
9 Registered Partnership

Religion Code

Legacy Code
 0.001 Tc 0.003 428a of 6CID 1.10 Td(22)tod( ) tr kAMCID 11 BD3 (c)-3 (aC 0.0[(o

011703	17-JAN-2003
01/17/03	17-JAN-2003
01-17-03	17-JAN-2003

You may enter any alpha key for today's date. If you place a 2 digit number, the system will assume that day in the current month.

Confidential Information Indicator

Biographic information should always be considered confidential.

For students, this field will be left blank unless they request (in writing) the Registrar/Regional Campus to place a confidentiality hold on Directory or any student or personal Information. This hold will remain in place until revoked, in writing, by the student. Directory information includes name, whether a student is enrolled part or full time, dates and terms of attendance, major, and degree or certificate earned as listed in the University Catalog.

For employees (Faculty, staff and student employees): standards will be determined by the Office of Human Resources.

Deceased Information

Due to the sensitivity of this issue, prompt attention is important so future contacts are discontinued. Deceased information should be verified.

Students: This update is restricted to the office of the Registrar
Alumni: This update is restricted to the Advancement Services
Employee: This update is restricted to Human Resources

Veteran File Information

The Student Veteran File Number is used to maintain a person's veteran identification number and is entered on the Student General Person Form.

Email Standards

Enter the email address as supplied by the student/employee/vendor. Email types include:

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PER  Personal E-Mail Address
BUS  Business E-Mail Address
ULV  ULV E-Mail Address – should not be updated
LAV  La Verne E-Mail Address – should not be updated
WEB  Website
ADV  Alumni Preferred
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GU   Guardian
MO   Mother's E-Mail Address
FA   Father's E-Mail Address
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Emergency Contact

This information is provided by students and employees via Self Service.

Duplicate Records

Every effort should be made to avoid the creation of a duplicate record. Any employee who finds a duplicate record should contact and work with your appropriate data owner for the predominant record type (e.g. Registrar's office for Active Students, University Advancement for Alumni only records etc.) so that the records can be merged in the correct manner.