



UNIVERSITY OF  
**Central Oklahoma**

BANNER® SYSTEM

GENERAL PERSON DATA STANDARDS MANUAL PURPOSE AND PROCEDURES

**Version 1.7**  
**Effective July 2016**

# Table of Contents

CHAPTER 1: GENERAL INFORMATION .....	4
Purpose .....	4
Scope of this Manual .....	4
General Person Form Access .....	5
Legal Issues .....	6
Duplicate Entries.....	6
System Managers.....	6
University of Central Oklahoma System Managers .....	7
System Manager Policy.....	7
Information Users .....	7
General Notes .....	8
CHAPTER 2: RECORD SEARCHES .....	9
Person Name Searches .....	9
Non Person Name Searches.....	10
CHAPTER 3: GENERAL PERSON INFORMATION .....	11
Using Common Matching.....	11
GOAMTCH – Common Matching Entry Form .....	11
Social Security Numbers .....	12
Gender .....	13
Identification Number Standards.....	13
Date of Birth.....	13
Citizen Type.....	13
Legacy Codes.....	14
Race/Ethnicity Codes .....	14
Marital Codes.....	15
Confidential Information Indicator .....	15
Deceased Information.....	15
Veteran File Number Standards.....	16
“Invalid” Address Indicator .....	16
CHAPTER 4: NAME STANDARDS .....	17
Last Name .....	17
First Name.....	17

Preferred First Name .....	17
Middle Name .....	18
Foreign Names .....	18
Former Name .....	18
Individual Prefix Standards .....	18
Suffix Standards .....	19
Legal Name.....	19
Nonperson Name/Vendor .....	19
Name Changes .....	20
CHAPTER 5: DATE STANDARDS INFO .....	20
CHAPTER 6: ADDRESS AND TELEPHONE STANDARDS .....	21
Address Types .....	21
Features .....	21
Address Types .....	22
Telephone Types .....	23
E-Mail Types.....	23
CHAPTER 7: OTHER ITEMS .....	24
Building Codes.....	24
CHAPTER 8: MAINTENANCE FORM CONSIDERATIONS .....	24
Data loads .....	24
TIPS & TRICKS .....	25
DOCUMENT HISTORY.....	26

# CHAPTER 1: GENERAL INFORMATION

## Purpose

These guidelines establish measures for the protection, access, and use of the University of Central Oklahoma's (UCO) BANNER® system and equipment. They also define the responsibilities of those that access and manage the data and equipment. Offices may have individual guidelines that supplement, but do not supplant or contradict this statement. Data entrusted to the University by other organizations (e.g., foundations and government agencies) is governed by terms and conditions agreed upon with those organizations. Specific issues not governed by such agreed terms shall be governed by the guidelines set forth in this document.

BANNER® is a modular system; there are modules for different functional areas. There is a Financial Aid module, a Finance module, a Human Resources module, an Advancement (Alumni/Development) module, and a Student module. There is also a General module that ties all of the functional modules together. A person's ID number, name, address, etc. are contained within the General module and are shared by the other modules.

BANNER® is a collection of forms with embedded 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, which reside in an Oracle database. It is a relational database; tables are linked together by means of some internal identification number, and therefore, data redundancy is limited. One table might have a student's ID number and the course numbers in which he/she is enrolled. 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 in which a student is enrolled.

This manual prescribes a process for creating and maintaining General Person information in the Oracle database using BANNER®. BANNER® Navigation and Maintenance sessions must be completed prior to General Person training.

## Scope of this Manual

This manual is constructed to ensure General Person information is maintained as accurately and completely as possible, and no duplications of data occur within the database.

Custodians and owner offices are responsible for training for inquiry and maintenance within their respective modules in cooperation with Information Technology.

### Custodian for the Advancement (Alumni/Development) System

- Development Office

### Custodians for the Finance System

- Financial Services
- Purchasing and Payment Services and Materials Management
- Budget Office

### Custodian for the **Financial Aid** System

- Financial Aid Office

### Custodians for the **Student** System

- Student Affairs
- Student Services Office
- Business Services

### Custodians for the **Human Resources** System

- Human Resources Office
- Financial Services

Security or access levels for each individual employee are determined by owner offices (custodians), and each user must complete training before access is granted. Access is granted to an individual through the completion of the Employee Security Access Form.

### **General Person Form Access**

General Person access is awarded only after appropriate training is received. Entries to BANNER® General Entity Person or non-person tables affect the overall integrity of the database used by all BANNER® systems.

Failure to abide by the guidelines outlined in this manual for creating and maintaining General Entity Records could result in removal of access and a subsequent reassignment of duties. The following job description has been developed for all individuals with General Person access:

Purpose: Ensure database integrity and the goals of easy, professional, cost-effective communication for the UCO community and its contacts by:

- Avoiding creation of duplicate records for a single entity
- Providing complete name/address information in a timely manner, with an audit trail of changes
- Using data entry standards to facilitate consistent reports and searches
- Sharing effective processing discoveries and problem resolution tasks with other team members
- Directly taking advantage of interpersonal networking, database capabilities and workflow analysis outlines.

Each functional maintenance office has an individual who participates in meetings on an as-needed basis to ensure current issues are continually addressed. These representatives also have a job description:

Purpose: Represent their areas in advising on policies, determining maintenance procedures and resolving cross-functional problems; ensure pertinent General Person maintenance rules and concerns are communicated to area members.

Duties:

- Ensure adequate time is available to serve an area representative
- Understand the particular needs of your represented area.
- Communicate your area's proposals, and concerns by connecting periodically with individual users in your area, and bringing issues to the meetings.

## Legal Issues

General Person members are reminded of their legal obligation for data access and disclosure:

- Users must be aware of federal regulations (FERPA, etc.) and university policies applicable to data under the jurisdiction of their offices.
- Disclosure of information is restricted to custodians or their representatives. Contact a custodian or direct representative (i.e., the Registrar or a representative of the Registrar for student information, for example) prior to disclosure of information.
- Data is private and shall be used only for the legitimate business of the university.

## Duplicate Entries

*NOTE: Each system has similar screens but the first character defines what system and what module a form pertains to:*

F - FINANCE  
S - STUDENT  
P - HUMAN RESOURCES/PAYROLL  
A - ADVANCEMENT (ALUMNI/DEVELOPMENT)  
R - FINANCIAL AID  
T - ACCOUNTS RECEIVABLE

General Person data may be entered on a variety of screens, depending on the system and module used. Most name and address data are entered on "Identification"; forms ending in IDEN (example: Student uses SPAIDEN, Advancement uses APAIDEN, Human Resources uses PPAIDEN, Finance uses FOAIDEN, and Financial Aid uses RPAIDEN). Because BANNER® is a shared database; entry into any IDEN form affects all systems. It is critical that new records do not duplicate existing General Identity (PIDM) entries on the systems.

The term "duplicate PIDM" means that one single entity (whether an individual or corporation) has more than one BANNER® record. This undermines the purpose of a relational database, providing either multiple versions of the truth or incomplete information for the entity. Some results may be: 1) reports are invalid; 2) contacts are inaccurate; 3) inaccuracies can be seen as confusing or uncaring when communicating with both internal and external clients.

## System Managers

A System Manager, usually an administrator of a university office or department, may make data available to others within his or her purview for use and support of the unit's functions.

Before granting access to data, the System Manager shall be satisfied protection requirements have been implemented and a "need to know" is clearly demonstrated. By approving end-user access to institutional

data, the System Manager consents to the use of this data within the normal business functions of administrative and academic offices. Query access to institutional data will be broadly available throughout the institution.

System Managers are responsible for the accuracy and completeness of data files in their areas. Misuse or inappropriate use by individuals will result in revocation of the user's access privileges. System Managers are also responsible for the maintenance and control of the administrative information system's validation and rule tables, and the validation and approval of software releases that affect their areas of responsibility. These tables and processes define how business is conducted at UCO.

### University of Central Oklahoma System Managers

AREA OF RESPONSIBILITY	SYSTEM MANAGER
Student System	Associate Vice President/Registrar
Finance Systems	Assistant Vice President for Administration
Financial Aid Systems	Financial Aid Director
Payroll	Assistant Vice President for Administration
General Systems	Associate Vice President of Information Technology
Human Resources	Assistant Vice President for Administration
Advancement	Vice President for Development

#### System Manager Policy

The following conventions govern which office makes changes to student, employee, financial aid recipient or vendor records in the integrated administrative information system called BANNER®.

IF THE PERSON IS...	THEN...
An Employee and not a student	Human Resources makes the change
An Employment Applicant	Human Resources makes change
Student and not an Employee	Enrollment Services makes the change
A Student and an Employee	The General Person change form is submitted to Human Resources or Enrollment Services, whichever the person chooses. Whichever office makes the changes, should notify the other office of the change
Student Applicant; not a Student or Employee	Enrollment Services makes the change
A Financial Aid Applicant and not any of the above	Financial Aid makes the change
A Vendor, not any of the above	Purchasing and Payment Services or Financial Services makes the change
Alumni or Donor and not any of the above	Alumni or Development Office

#### Information Users

Individuals are responsible for understanding all data elements that are used. If a person does not understand the meaning of a data element, he/she should consult the appropriate system manager or

Information Technology. Users should exercise due care in using the institution's electronic information systems, both the central institutional database and all departmental systems, to protect data files from unauthorized use, disclosure, alteration, or destruction. Each person is responsible for security, privacy, and control of his/her own data. Each user is responsible for all transactions occurring during the use of his/her login and password.

### **General Notes**

All employees who require access to online records must use a system access code defined specifically for the employee. This will allow updates to be tracked to a specific user access code and a specific person.

Temporary employees and students cannot modify; nor will they be permitted access to validation tables, and transactions that directly affect the student transcript (such as grades). This includes functions that create financial transactions (such as housing assignments and registration). Exceptions may be authorized at the discretion of the System Manager, or his/her designee. It is the department/division head's responsibility to ensure that system access is canceled for employees and students who no longer work in their area.

Human Resources will notify Information Technology of all terminations. This does not eliminate the department/division head's responsibility to communicate terminations in a timely manner, but provides a back-up system to ensure that this closure occurs.



## CHAPTER 2: RECORD SEARCHES

**SEARCH FIRST** - Before you create a new record for a person or organization, you must conduct an ID and name search to make sure the person or organization hasn't already been entered in the BANNER® database. (see Chapter 3.) All offices must conduct a thorough search to prevent entering a duplicate record.

Every effort must be made to ensure you are not duplicating an existing record. It is very difficult to effectively align all subsequent transactions under the proper single ID if a duplicate record is ever created.

Careful searching will prevent the creation of duplicates.

### Person Name Searches

- Press LIST FIELD VALUES to enter the SOAIDEN search screen, or enter SOAIDEN into the Go To bar on the General Menu page.

*NOTE: Searches must be done from an IDEN or VEND form because these search ALL general person records. FTMVEND displays both person and nonperson records. For IDEN screens, List of Values searches for person records; Count Query Hits searches for nonperson records. Searches from other screens restrict the information to records associated with that module. In the Finance module, always add records with the FOAIDEN screen. In the Alumni module, use the SOAIDEN form for person searches and SOACOMP for non-person searches.*

- Type in the name to be searched using the %(wildcard) to broaden the search.

**Example:**

Record: Dennis Redmond  
Query as: Last Name: Redmond  
First Name: D%  
Or just Last Name of Redmond%

Record: John McDonald  
Query as: without spaces (McDonald) and with spaces (Mc Donald)

*NOTE: Some names have unique spellings. Search on all possibilities by broadening the wildcard search or use the "sounds like" function. Also, remember that suffixes are not part of the name.*

**Example:** Fergason, Furgason, Ferguson. Input as, F% or F\_rg%

- When a list of possible names is retrieved for a person, verify student ID number, SSN, address, birth date, previous names (such as maiden name, name at graduation, and former married name), and any other information available. **REMEMBER TO SEARCH FOR BOTH FULL AND COMMON VERSIONS OF NAMES.**

**Example:** William as well as Bill; Lawrence as well as Larry.

- Also, remember to search using the middle name field.

**Example:** C. Reid Lau goes by Reid. Search either by entering only the last name or do

separate searches for Reid on both first and middle name fields.

- The underscore ( \_ ) key can be used to replace one character at a time.

**Example:** To search for Anderson that may actually be Andersen use, *Anders\_n*. This will find both AndersOn and AndersEn records.

- For FOREIGN names, it is generally easier to search by FIRST name.

**Example:** *Sayed Azmat Ali Shah* search for *Sayed* in first name field.

## Non Person Name Searches

*NOTE: If using Finance screens such as FTMVEND, remember to search the whole database by checking the "A" (for all) in the header record. Otherwise, searches are restricted to only those records that have had Finance transactions.*

- Non person names may be matched to their name, FEIN, or SSN. Use %(wildcard) when searching on ID in case there is punctuation or digits as part of the name. Example: I.B.M. or BONMAR1. The safest way to search on name is to include the wildcard at the front and at the end of the search.

**Example:** %Bon Marche%. This would find "The Bon Marche" or "Bon Marche Inc."  
Search on all separate portions of the name: %Bon% and %Marche%

Each identified duplicate PIDM problem takes hours to analyze and repair. Delays in handling duplicate records actually make successful resolution more complicated and time consuming. If you should create or identify a duplicate record, it should be taken care of by the designated person in your area immediately. Occasionally, multiple offices will need to work together to determine which record to keep, which to identify as the invalid record, and to properly consolidate the information contained in each record. Each area should have people who are designated as duplicate resolvers for records in their module.

## CHAPTER 3: GENERAL PERSON INFORMATION

### Using Common Matching

This is just a quick sheet of instructions for using Common Matching. For much more detailed instructions please see the most recent SCT Banner® General, Student, Financial Aid, Finance, and HR Release and User Guides.

*NOTE: If you are attempting to search for a specific record in Banner® use the form %AIDEN. The Common Matching form GOAMTCH is designed to check existing records before a new record is added to the database. In other words, it is for creating new records while avoiding duplicate records. It is not designed for general searching of records. Also, GOAMTCH does not use wildcards. In %AIDEN, % and \_ are very useful search tools that take the place of unknown characters. GOAMTCH treats these symbols differently. If you enter a % or \_ in a name field and create a new record the symbol will be stored as part of the person's name. Also, Common Matching will remove the symbols from the name when searching for matches. For example, if you search for Jon%s, the Common Matching process will search for Jons, and Jones will not be considered.*

### GOAMTCH – Common Matching Entry Form

GOAMTCH can be accessed directly or from %IDEN forms, FTMVEND, SRAQUIK, SAAQUIK, etc. It is called automatically when an ID is generated or entered, and the ID does not already exist in Banner®.

Whether or not Common Matching is turned on, the user will access GOAMTCH as part of the matching process for data loads.

Enter the ID for the new record in the ID field. If you plan on using a generated ID, press the Generate ID button or type GENERATED in the ID field.

Enter a Matching Source in the Matching Source field. This is the set of rules that you will use for Common Matching. If a default Matching Source has been set up for a user in GORCMUS it will already appear in this field. You can also see a list of available Matching Sources by clicking the search button or pressing F9. This is not an option if GORCMUS has been set up to not allow other matching sources for the user.

Enter the information for the person in this block. Fill in as much information as possible for the person. Remember to follow naming standards and not to use wildcards. This block will populate automatically during the matching process for data loads. When all of the available information has been entered press the Duplicate Check button or Ctrl – Page Down.

- Enter the Last, First, and Middle names if available. The Last Name is always required. Also, GOAMTCH will check for aliases, such as Bob if Robert is entered as a first name. If you are creating a non-person, use the Non-Person Name field.
- Set the Address Type if an address is available. This will be the type of address created if the record is determined to be new or if the address does not already exist in a matching record. Address Type, E-mail Type, and Telephone Type default to the type set up in GORCMSC. The type can be changed using the search button or F9.

- Enter the address information if it is available in the Street, City, State, Zip, County, and Nation fields.
- Enter the SSN if it is available in the SSN field. Be very careful of typos.
- Enter the Birth Date if it is available in the Day, Month, and Year fields. Be careful, because the Day field appears before the Month field.
- Enter the Gender if it is available in the Gender field.
- Enter the E-mail if it is available in the E-mail field.
- Enter the Telephone number in the Telephone field. The first field is for the area code, the second field is for the 7 digit number, and the third field is for an extension.

The Match block is automatically displayed after the matching process is completed and a match is found. The data entered remains in the Data Entry block. Review the match that Common Matching found and see if it is the same person as the record that you are creating. If it is, use the Select or Update ID buttons accordingly. If it is not, use the Create New button. If you are not sure, you can use the Details button to see additional information the record contains. The forms available by Details are set up by GORCMSC. You can also click on the Potential Matches tab to see if a matching record exists there. If there are no Matches or Potential Matches and you still want to check for duplicates you can Clear the block and change the information in the Data Entry block for another Duplicate Check.

- The All Addresses field is a pull down list that displays all of the addresses for the matched ID.
- The Match Priority field indicates the rule priority of the rule that Common Matching used to find the match.
- The Match Results field lists the criteria on which the match is based.
- Pressing the Clear button will clear the Match block data and return to the Data Entry block.

The Potential Matches block is automatically displayed after the matching process is completed and a match is not found. This block works the same as the Match block.

Pressing the Create New button, or pressing F6, will reject all of the matches available and create the record as new.

Pressing the Select ID button, or pressing F4, will bring the information back to the form which brought you to GOAMTCH for the ID selected in the Match block.

Pressing the Update ID button, or pressing Shift – F4, will match the data entered to the ID selected in the Match block and insert the data into null fields for the record in Banner®. Use Update ID when you have entered information to the Data Entry block that does not exist in the database record.

Pressing the Details button, or pressing F8, will display the list of forms for additional match research.

### **Social Security Numbers**

Since Social Security numbers are essential to Financial Aid and Human Resources, the PERS form has a specific field to store the CORRECT (validated) Social Security Number. Because SSN may come from various sources, it may or may not be verified. **Therefore, do not add the SSN field automatically, unless you have verified it from proper documents.** It will be added manually once the number is verified. If a record is found to have multiple numbers in the “SSN” format, or the SSN appears to be

connected to the wrong person, report the problem to your supervisor for resolution.

## Gender

CODE	DESCRIPTION	EXPLANATION
M	Male	A male person, man or boy
F	Female	A female person, woman or girl
N	Not Available	Use N when the information is not available or if the gender cannot be determined by the name (i.e., Chris, Pat, Terry, etc.)

*NOTE: All employee records MUST be classified as male or female. 'N' is not an allowed entry in BANNER® for an employee. The use of 'N' must be minimized in student records as well; additional research must be made to determine gender code.*

## Identification Number Standards

### Person Identifier

UCO will use a system generated number for all individuals (persons). Make sure you read and understand the BANNER® procedures for creating system generated numbers, prior to entering new Person records. All system generated identification numbers consist of a unique nine-digit number, beginning with the \* symbol. Example: \*00000542

### Non-person Identifier

Non-persons are companies, sole proprietors, or organizations, as opposed to individuals (persons). They include vendors, granting agencies, banks, scholarship providers, and donors. For the purposes of this document, the term “companies” as used below includes corporations, companies, firms, organizations, institutions, government entities, and other non-person entities.

Identifiers for non-persons are created by the user at the time of data entry and are entered into the Banner® identification number field.

The Development Office has an approved procedure for entering donors who are not graduates or former students of UCO. Proper training on that procedure will be provided by the Development Office to new employees on an as-needed basis.

## Date of Birth

The Date of Birth is a required field for the HUMAN RESOURCES module.

## Citizen Type

Citizen type is required for all students and employees. Enter the correct code.

CODE	DESCRIPTION	EXPLANATION
NR	Non-Resident/Alien	Non-resident alien – a person who is not a citizen or national of the United States and who is in this country on a visa or temporary basis; they do not have the right to remain indefinitely
OT	Other Status	

CODE	DESCRIPTION	EXPLANATION
PR	Permanent Resident	Resident alien – a person who is not a citizen or national of the United States and who has been lawfully admitted for permanent residence.
RE	Refugee/Asylee	
ST	Status Unknown/ Uncollected	
SV	Student Visa (F-1 or M-1 Visa)	
TR	Temporary Resident	
US	US Citizen	Member of the United States, owing services to it, and having attendant political rights

### Legacy Codes

A legacy code indicates if a relative of the individual listed in the key block attended UCO. Use LIST FIELD VALUES to select the appropriate value.

### Race/Ethnicity Codes

Ethnicity Code is required for all students and employees. Enter the correct code.

“NEW ETHNICITY” CODE	EXPLANATION
Hispanic or Latino	A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race
Not Hispanic or Latino	
None	

*NOTE – The “Ethnicity” field should be left blank, and only the “New Ethnicity” field should be populated*

RACE CODE	DESCRIPTION	EXPLANATION
A	Asian	A person having origins in any of the original peoples of the Far East, Southeast Asia or the Indian Subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand and Vietnam.
B	Black or African American	A person having origins in any of the black racial groups of Africa.
N	American Indian or Alaskan Native	A person having origins in any of the original peoples of North and South America (including Central America) who maintains culture identification through tribal affiliation or community attachment.
P	Native Hawaiian or Other Pacific Islander	A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Island.
W	White	A person having origins in any of the original peoples of Europe, the Middle East or North Africa
NR	Non-resident Alien	A person who is not a citizen or national of

RACE CODE	DESCRIPTION	EXPLANATION
		the United States and who is in this country on a visa or temporary basis and does not have the right to remain indefinitely. (Note: Non-resident aliens are to be reported separately in the places provided, rather than in any of the racial/ethnic categories along with United States citizens)
X	Unknown	The category used to report students and employees whose race and ethnicity are not known.
XD	Declined to state	

### Marital Codes

When needed, the following codes apply:

CODE	DESCRIPTION	EXPLANATION
D	Divorced	Once married but now legally divorced
M	Married	Legally married
S	Separated	Legally married but living apart
U	Single	Never legally married
W	Widowed	Once married and spouse is deceased
X	Unknown	Information not available
Y	Not Applicable	Not Applicable

### Confidential Information Indicator

The Confidential Flag, which is set on the PERS screen, will be added by the Registrar or Human Resources and must be honored by other offices. A warning will appear on any field displaying the affected PIDM.

This flag indicates that a person wants some or all of their information blocked from the Campus Directory and/or wants some or all of their information NOT to be published in other documents.

*NOTE: When reports are run these are excluded.*

### Deceased Information

To prevent further mailings, records should be flagged immediately as **DECEASED** when valid information is received. Valid forms of information include: obituaries, death certificate or life insurance policies. Information received over the phone should **not** be accepted. Instead a request should be sent asking for written notification.

This information will be entered for all employees, students, alumni and applicants if available.

- Enter "Y" if employee/student is deceased. Enter date of death. The date of death is required if the flag is set to "Y"

*NOTE: When reports are run these are excluded.*

## **Veteran File Number Standards**

The Veteran File Number is the veteran's social security number. This information is collected and maintained for students by the Veterans Affairs Office.

### **“Invalid” Address Indicator**

When mail is returned from the Post Office for a particular address type, enter today's date in the “To Date” field and check the “Inactivate Address” box. This action should only be done for address types used in your particular area. If the new address is known, insert a new record, which will be effective the following day, and add the new information using the appropriate address type.

For reporting purposes, STATUS is used to determine if the address is active. Blanks are active; “I” indicates inactive. Inactive addresses will be bypassed by most reporting programs.

The State payroll system will give an “error” if there are gaps in the address

Because of the difference between modules, to indicate that an address is no longer valid, always change the status from blank to “I”. Not all Finance screens allow for a date range to be added. If possible, make all address changes to SPAIDEN rather than FOAIDEN or FTMVEND or FTMAGCY. When using the SPAIDEN screen, please insert the ENDING date. This date is helpful to other offices in determining how recently the address has been changed.

**Example:**      Address Effective Dates  
From: 01-Jan-1994      Status: I      (Status “I” is for inactive)  
To: 15-Aug-1995      Source:  
User: KATHYG



## CHAPTER 4: NAME STANDARDS

### Last Name

All information is to be entered using upper and lowercase letters. Enter the legal spelling and format of the last name, using standard capitalization rules.

Hyphens may be used to separate double last names (sometimes used in ethnic names or by persons who wish to utilize their maiden and married names). However, if there are two last names unhyphenated (e.g., Monica Lou Creton Quinton) leave the first, last name out of the record.

**Example:** Monica Lou Creton Quinn ==>**Quinn** as Last Name **Lou** is Middle Name

Apostrophes may be used in such names as O'Leary, O'Connor, etc. the period is not used, not even in an abbreviation in a person's name.

Commas, the pound sign (#), and the percent sign (%) are never used.

Spaces are permitted if the legal spelling and format of the name includes spaces, but use only if requested

Do NOT use titles, prefixes, and suffixes in this field.

**Examples:** Dr, Mr, Mrs, III, Jr, etc., should never be entered in the name field.

*NOTE: When a new person is being entered, and that new person has a previous name that is deemed necessary to be registered, enter the former name FIRST and immediately correct it.*

### First Name

All information is to be entered using uppercase and lowercase letters. Enter the legal first name, using standard capitalization rules.

Hyphens, spaces and/or apostrophes may be used.

**Example:**       **Ann-Marie** Jones  
                      **L'Ann** Johnson

The period is not used, not even in an abbreviation in a person's name. Commas, the pound sign (#), and the percent sign (%) are never used.

No first name should be entered as "NFN" – No First Name.

Employee Single Character First Names should be entered without a period. In those cases where a single character is designated as the first name and followed by a middle name, place the single character in the first name field and the middle name in the middle name field.

### Preferred First Name

If the person indicates that they go by their middle name or a nickname, enter that name in the "Preferred First Name" field. If they use their first name, leave this field blank. If a preferred first name is used, complete the "Alternate Identification" tab also, which will assist in searches on GUIALTI as well

as allow proper retrieval of that person's records regardless how the name is entered.

Preferred First Name should be entered into the preferred name field (i.e., S Paul Smith). If Paul is what the person goes by, then Paul would be entered into the preferred name field. Enter the legal spelling and format of the preferred first name, using standard capitalization rules. If no preferred first name is given, leave the field blank.

Preferred names are displayed in the key block and may be updated as needed. This is the name that will appear on lists/labels and reports and email.

Preferred names and legal names may be different. For example, legal documents may show that a person's name should be William Jonathon Jones but the individual prefers his mail to be addressed as Jon Jones or Bill Jones.

Preferred names may be changed if requested by the individual.

- Go to the IDEN screen for that individual.
- Press the PAGE DOWN key to go to the CURRENT IDENTIFICATION BLOCK.
- Type over the name that is displayed and press SAVE (F10).
- Remember to change first and/or middle name if necessary.

Commas, the pound sign (#), and the percent sign (%) are never used. Spaces are permitted for double first names (i.e., Mary Ann, Bobby Joe).

Do NOT use titles, prefixes, and suffixes in this field.

Examples: Dr., Mr., Mrs., III, should never be used in the name field.

### **Middle Name**

All information is to be entered using uppercase and lowercase letters. Enter the legal middle name or middle initial, using standard capitalization rules. If no middle name exists leave field blank.

Hyphens, spaces, and/or apostrophes may be used to separate double names.

The period is never used, not even in an abbreviation in a person's name.

Commas, the pound sign (#), and the percent sign (%) are never used.

### **Foreign Names**

Because of the limited characters available on a normal keyboard, make every effort to approximate the foreign name as closely as possible.

### **Former Name**

If former name is known, put in the appropriate field when creating a new record.

### **Individual Prefix Standards**

All codes are to be entered using upper and lowercase letters, no periods. Use standard capitalization rules for entering the description. Enter prefix in its own field. **DO NOT** put prefixes in the regular first

name field.

## **Suffix Standards**

All codes are to be entered using upper and lowercase letters, no periods. Use standard capitalization rules for entering the description.

Enter suffix in its own field. **DO NOT** put suffixes in the regular last name field.

*NOTE: if you do not have a suffix, please leave blank.*

## **Legal Name**

*IMPORTANT NOTE: The actual BANNER® legal name field is never used because searches cannot be done from that field.*

The legal name field is not used by UCO.

## **Nonperson Name/Vendor**

Naming Conventions for new Vendors (after following search procedures outlined at the beginning of this chapter.) Use the first three letters of the first name, followed by the first three letters of the last name to create a six-character vendor code. For example: John Smith becomes JOHSMI. If a second John Smith record for a different person needs to be created, their vendor code would be JOHSMT (using the T as the next available letter).

*NOTE: If the nonperson vendor already has a Banner® ID, but no vendor code (found by common matching on GOAMTCH), do not create the six-character vendor code. Use the Banner® ID. Otherwise you will create a duplicate record. On FTMVEND, you would enter the Banner® ID, go into the next block, make any necessary changes to update data, and save. This process creates a vendor status for the existing ID.*

All information is to be entered using title-case format (uppercase/lowercase letters). Never use all uppercase or all lowercase letters. Enter the vendor's name using standard capitalization rules.

Hyphens may be used to separate double names. Apostrophes may be used.

The period should not be used unless it is a part of the company's legal name. Commas, the pound sign (#), and percent sign (%) are never used.

Spaces are permitted between multiple names.

Ampersand can be used only when part of a formal name (Baltimore & Ohio Railroad); use "and" in all other cases.

Abbreviations are allowed 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, omitting any periods.

All company names should be spelled out if possible. Acronyms should not be used for company names (IBM, ITT, etc).

Name change for non-person records are made like preferred name changes. Use the LAST name field only.

- Go to the FOA IDEN screen for that record.
- Use the PAGE DOWN key to go to the CURRENT INFORMATION BLOCK.
- Type over the name that is displayed and press the SAVE (F10).

## **Name Changes**

Name changes are not permitted without legal documentation (i.e., driver's license, marriage certificate, court order, or Social Security Card with new name, etc.).

If the person is a current employee, the name change is to be done by the office of Human Resources. All name changes for current students, are to be handled by the Registrar's office. Other name changes may be made by the appropriate office with appropriate documentation.

By request, a report will be run and distributed to the offices of Human Resources, Financial Aid, Accounts Payable, Purchasing, Registrar, Bursar and Admissions recording name changes made in the prior month.

To fix an error in the record, please create a new record with the correct spellings and delete the old record that had the errors

## **CHAPTER 5: DATE STANDARDS INFO**

All dates will be displayed in the format of dd-mon-yyyy.

**Example:**        January 17, 1993 becomes 17-JAN-1993  
                         November 1, 1992 becomes 01-NOV-1992

Dates may be entered in BANNER® as mm/dd/ccyy, mm/dd/yy, etc., and the system will display the date in the standard format above. Be aware that there is a time stamp associated with dates, even though it is not displayed. On the Finance side, this is very important as it relates to requisitions and budget changes.

## CHAPTER 6: ADDRESS AND TELEPHONE STANDARDS

### Address Types

BANNER® permits multiple address types to be entered for a person or vendor. The use of each address type must be strictly defined so that conflicts do not arise among the various functional areas (admissions, registration, financial aid, student billing, vendor billing, human resources, payroll, accounts payable, purchasing, alumni, development, etc.). Because name and address data are shared by all areas, procedures are needed to ensure areas make address changes only under certain conditions based upon the classification of the person or vendor. Classifications include current student, applicant, pre-student (recruit or financial aid applicant), staff, faculty, student worker, vendor, alumni, and donor.

In addition, there are some restrictions in BANNER® on how addresses can be used within each system. The Student System permits address hierarchy to be used when printing reports. For instance, when invoices are run, the system can first search for a billing address and then a permanent address type. This allows for multiple locations for a single student.

The postal software is an address verification system integrated with the Banner® Enterprise system. It will verify and standardize US postal addresses entered in a Banner® form or Student Self Service. In addition, the system will correct telephone number format errors.

The verification process is seamless. As information is entered, the software will verify, correct, and format addresses to USPS postal standards along with University of Central Oklahoma Data Entry Standards. If the verification system is unable to verify the address, warning windows will display offering suggestions to the user for correcting the address record.

### Features

- Verifies and standardizes postal addresses in a number of Banner® forms (see list below) using appropriate address types (see list below).
- Verifies and standardizes postal addresses in Web for Student, Web for Prospect, and Web for Admissions.
- Corrects and reformats misspellings and improper use of upper/lower case to USPS standards and University of Central Oklahoma Data Entry Standards.
- Displays suggestions for correcting the entry when an invalid address is entered.
- Allows addresses it determines to be invalid but which are actually correct to be saved at the operator's discretion.

## Address Types

CODE	DESCRIPTION	EXPLANATION	USED BY
AP	Accounts Payable	AP & Travel Use	AP and Travel
BI	Billing / Check	Required for non-accounts payable billings and AR checks	AR, AP, Travel, Grants and Contracts
BU	Business	Business' primary address or individual's work address	Alumni, Development, Gift
CM	Campus Mail	UCO campus address. Directory address, office location, on or off-campus address,	Human Resources
DL	Diploma Address	Address for diploma mailing if different than	Registrar
EM	Emergency Contact Address	Record emergency contact information for	All Offices
GC	Grants and Contracts	Billing address for Grants & Contracts	Grants and Contracts
GR	Gift Receipting	Gift Receipting address	Alumni, Development, and Foundation
MA	Mailing / Current, Local Student	US mail contact address	Financial Aid, Registrar, Admissions, Alumni, Development, Bursar
MG	Matching Gift	Matching gift company's address	Development, Foundation
PD	Parent Data Load	Student address received via data load of financial aid or test score information. May	Admissions, Financial Aid
PF	Parent/Guardian – Father	Student's father address	Financial Aid, Registrar, Admissions, Alumni, Development
PM	Parent/Guardian – Mother	Student's mother address	Financial Aid, Registrar, Admissions, Alumni, Development
PO	Purchase Order	Company address for purchase order	Purchasing and Accounts Payable
PT	Data load – Parent	Parent address received via data load of financial aid or test score information. May contain inaccurate data.	Admissions, Financial Aid
PR	Permanent	Permanent Address	Human Resources
XX	Required	Table for AR to Finance TGRFEED	Banner®

## Telephone Types

BANNER® permits multiple telephone types to be entered for a person or vendor. Following are the types used by UCO.

CODE	DESCRIPTION	USE
BI	Billing	Invoicing phone if different from business phone
BU	Business	Primary phone for business or individual's business
CEL	Cellular Phone	Mobile phone if provided
CM	Campus	Campus phone for students, staff or faculty
EM	Emergency Number	Phone number of person to contact in an emergency
FAX	Fax	Facsimile phone number
GC	Grants and Contracts	Grantor Phone
GR	Gift Receipting	Phone number associated with Gift Receipting address
HQ	Company Headquarters	Business headquarters number of different than business
MA	Mailing	Phone number associated with mailing address
MG	Matching Gift	Phone number associated with Matching Gift address
TEC	Technical Support	Technical support numbers for vendors
PP	Data Load Parent	Parent phone number from data load process
PGF	Parent/Guardian - Father	Parent/Guardian – phone number – PF address type
PGM	Parent/Guardian - Mother	Parent/Guardian – phone number – PM address type
PR	Permanent	Phone number associated with permanent address type
DAY	Daytime Phone Number	Phone number where person may be reached during the day (if different than PR or CEL)

## E-Mail Types

BANNER® permits multiple e-mail types to be entered for a person or vendor. Following are the types used by UCO.

CODE	DESCRIPTION	USE
BU	Work	Individual or business work e-mail
EM	Emergency	Emergency contact e-mail address
MA	Personal	Personal or home e-mail address
PA	Parent	Parent or guardian e-mail address
UCO	UCO assigned	E-mail address assigned by UCO

## **CHAPTER 7: OTHER ITEMS**

### **Building Codes**

All areas of Banner® where a code is required to designate a physical UCO maintained building will use a standard three character code as set out in the table below. Building codes are also used to designate the location of off-campus class offerings (e.g., ADM = Lillard Administration), and these should be as descriptive as possible within the 6 character limit.









## **CHAPTER 8: MAINTENANCE FORM CONSIDERATIONS**

### **Data loads**

Information from financial aid or student ACT/SAT scores is received from outside sources. These tapes often contain incorrect data or do not conform to the standards set by this handbook. Because of this, the address type PD has been created to store this information. Since many of these individuals will not complete the registration process, their records will not be forwarded to Admissions and Student Records. If reports are needed for these individuals, however, the addresses should be corrected including removing the pound sign (#) and then copied to the appropriate address type (MA, PR, etc.). However, a letter may be generated using the PD address type if needed, and these address types would reflect the information as it came from the tape.



## TIPS & TRICKS

OPTION	TOOLBAR ICON	KEYBOARD SHORTCUT	PURPOSE	
Direct Access		F5	Accesses the Direct Access Form (GUAPARM).	
Rollback		Shift-F7	Action depends on what type of form is currently used.	
			<b>FORM</b>	<b>ACTION</b>
			Application and Inquiry	Clears all information (except Key information) and returns you to the first enterable field in the Key Block.
			Validation	Returns you to the first enterable field on the form.
Query	Returns you to the first enterable field on the calling form.			
Save		F10	Save all changes entered since the last time you saved	
Cut		Ctrl-X	Cuts selected text and places it on the clipboard	
Copy		Ctrl-C	Copies selected text and places it on the clipboard	
Paste		Ctrl-V	Pastes text from the clipboard to the cursor location	
Previous		Ctrl-Page Up	Moves cursor to the previous block that has at least one enterable field	
Next		Ctrl-Page Up	Moves cursor to the next block that has at least one enterable field	
Clear		F7	Clears all information in the current block. Also known as Enter Query. Puts the form in Query Mode.	
Enter		F7	Puts the form into Query Mode so you can enter search criteria to see information already in the database	
Execute		F8	Searched the database and displays records that match your search criteria	
Last Criteria		F7 twice	Enters the criteria from your last search (enabled only when you are in Query Mode)	
Cancel		Ctrl-Q	Cancel the Query and takes the form out of Query Mode.	
Show Keys		Ctrl+F1	Displays the list of functions and their equivalent key strokes available in your environment for the current form, window, or field.	
List		F9	Displays the List of Values (LOV) for the current field if LOV appears in the Status line.	

# DOCUMENT HISTORY

## Revision Record

Number	Date and Sections	Author	Notes
1.5	12-2013 Entire Document	Christine Allison	Removed Appendix references, because we do not have appendices, updated
1.6	04-2014 Review	Christine Allison	Removed building code table. Completed edits for grammar and spelling.
1.6	04-2014 Tips & Tricks	Christine Allison	Addition of the Tips & Tricks table
1.7	05-2016 Document Formatting	Cristi Moore	Clean-up for consistency throughout document.