

# Wright State University

## Banner Data Standards

Version: 2.0  
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## 1.0 Field Content Generalizations

### 1.1 Characters to Avoid

Pound sign (#) and percent sign (%) should NOT be used in any data field.

### 1.2 Coded Values

Codes should be in upper case.

### 1.3 Description Values

Descriptions associated with a code should be in title case. Names of departments, courses, buildings, accounts, etc. are typical cases. (e.g. a course name of "Humor in the Workplace" offered by the "Department of Jocularly")

*[Title case is the capitalization style used for book titles. It involves always capitalizing the first and last words. Most other words are capitalized except for articles (a, an, the), coordinate conjunctions (and, but, or, nor, for), short prepositions (of, in, on, at, with) or the "to" preceding a verb.]*

### 1.4 Freeform Text Values

Freeform text (e.g. comments) should be in mixed-case.

### 1.5 Date/Time Formats

#### 1.5.1 Date Format

*[Note: The Banner "dd-mmm-yyyy" format uses 3 letters for the month designation. e.g. 31-DEC-2005]*

Output format:

dd-mmm-yyyy [Banner format]

Permissible input formats:

*Note: When only a 2-digit year is input, a 4-digit year is derived.*

*This may work well for some dates, but more distant dates (such as birth date) may require input of all four digits to obtain the desired year.*

**mmddyyy** (or mm/dd/yyyy or mm-dd-yyyy) e.g. 12312005

mmddy (or mm/dd/yy or mm-dd-yy) e.g. 123105

**ddmmmyyy** (or dd-mmm-yyyy) e.g. 31DEC2005

ddmmmy (or dd-mmm-yy) e.g. 31DEC05

Enter as "11111111"/"11-NOV-1111" if a date is unknown, but required.

#### 1.5.2 Time Format

Enter in 24-hour format. e.g. 1700 for 5:00 PM

## 2.0 General Person Fields

### 2.1 Names (in general)

Use mixed case (upper/lower).

Use legal name (as on Social Security card) and use "Pref .First Name" to accommodate variations on first name. *(Note: There is no preferred student name policy. Use of this field is limited to non-student records)*

Use PREF (preferred) name type to accommodate preferences in the last name. *[Note: Frequency and ease of use of this alternative name type is currently uncertain.]*

Use periods, hyphens, spaces and apostrophes exactly as the person indicates.

If a person has only one "name", enter it in the last name field and place a period in the first name field (to satisfy the required input constraint).

Full Legal Name field is not currently intended for use.

#### 2.1.1 First Name

Single character first names: Enter the first initial, a period, a space, the middle name (with the middle name field left blank). e.g. First Name = "J. Paul" and Middle Name = blank

Hyphens are permitted for double first names.

Spaces are permitted.

If no first name, place a period (.) in the first name field.

Do NOT include titles, prefixes or suffixes.

#### 2.1.2 Middle Name

A middle initial should not have a period placed after it.

Hyphens are permitted for double middle names.

Spaces are permitted.

Do NOT include titles, prefixes or suffixes.

#### 2.1.3 Last Name

Hyphens are permitted for double last names.

Spaces are discouraged and should be eliminated if extraneous.

(e.g. McDonald)

For names beginning with Mc, Mac, Van, Von, Da, De, Di, enter as person specifies, else capitalize both parts and do NOT place a space between them. (e.g. McDonald,, DaVinci).

For names beginning with (O'), capitalize both parts, with no spaces. (e.g. O'Leary)

Do NOT include titles, prefixes, or suffixes.

#### 2.1.4 Prefix

Always store in the prefix field, NOT in the first name field.

Do NOT use punctuation in the prefix field.

#### 2.1.5 Suffix

Always store in the suffix field, NOT in the last name field.

Use periods in the suffix field, when appropriate. (e.g. Jr.)

2.1.6 Non-person Names (defer to A/P)

Use "title case".

Input as supplied by vendor.

Use the ampersand (&) when it is a part of the formal name. (e.g., AT&T)

Use acronyms when the company is recognized by their acronym. (e.g. IBM, SCT)

Avoid "The" as the first word, unless it is important to the full legal name.

For d/b/a, place the person's name in the business name field and "d/b/a <business\_name>" in the first address line.

Avoid using "Attention:" or "In care of" due to reorganizations and turnover. If needed, use the office or title rather than the individual's name and enter it in the first address line.

Avoid abbreviations unless constrained by space. When needed, abbreviate words at the right, first.

2.2 Addresses (in general)

Use mixed case (upper/lower).

Conform to Post Office standards, except that WSU will use mixed case.

Omit punctuation except where required as part of the name.

2.2.1 Street

Do not use more than three of the four possible address lines. Use Line1, then Line2 and Line 3, if needed.

If multiple lines needed, proceed from the specific to the general. (*For example: your office room and building is specific, and 3640 Colonel Glenn Hwy is more general.*)

Use "c/o" for "In care of".

If a P.O. Box and street address is specified, place the street address above the P.O. Box line.

Use standard postal street designators. (e.g. St, Rd, Dr, Blvd, Ct)

Use standard postal directionals. (i.e., N, S, E, W, NE, NW, SE, SW)

If the secondary unit designator (e.g., Apt, Unit, Ste) does not fit on same line as street, place the unit designation line above the street line.

Never use pound sign (#) for "Apt".

Enter numbered streets as indicated by person; if uncertain, spell numbers less than ten and use digits for numbers 10 and above. (e.g. Fifth Ave)

Use "PO Box n" format for PO boxes.

Use "RR n Box n" format for Rural Route, RFD (Rural Free Delivery) and RD (Rural Delivery) designations.

Spell out "General Delivery" if applicable.

County, state and local highways should be spelled out as in the following examples:

County Highway 123

County Road 123

OH County Road 123

Expressway 123

Highway 123

Interstate 123

Interstate 123 Frontage Rd

Road 123

Route 123

State Highway 123

State Road 123

Township Road 123

US Highway 123

OH Highway 123

OH State Highway 123

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- 2.2.2 City  
Do NOT abbreviate unless constrained by space.
- 2.2.3 State/Province  
Use standard state or province codes.  
For Canadian addresses, use the standard province codes.  
(i.e. AB, BC, MB, NB, NF, NS, NT, ON, PE, QC, SK, YT)  
*[Note: these are to be selected from a list of values.]*
- 2.2.4 Zip Code/Postal Codes  
Required for all U.S. and Canadian addresses.  
When using 9-digit U.S. zip codes, place a hyphen after the first 5 digits.  
e.g. 12345-6789  
Canadian 6-character zip codes should have one space after the first 3 characters.  
e.g. A1B 2C3
- 2.2.5 Nation  
Do NOT code a Nation value for U.S. addresses.  
DO code a Nation value for all non-U.S. addresses.
- 2.2.6 Military Addresses  
*refer to: <http://www.usps.com/supportingourtroops/addressingtips.htm>*
- 2.2.7 International Addresses  
International addresses should not be loaded in the 'PR' address field; they should only be loaded as an 'IN' type. The University Center for International Education is the resource on correct formatting of international addresses.
- 2.2.8 WSU Work Addresses (type=WW)  
Address Line 1: Building name, room number  
Address Line 2: Off campus location (e.g. "Kettering Medical Center")  
City: Actual City  
State: Actual State  
Zip Code: Actual Zip Code
- 2.3 Phone Numbers  
Area Code: Actual (no parentheses)  
Prefix: Actual  
Number: Actual  
Extension: Actual, if needed.  
Do NOT enter the hyphens.  
Do NOT enter "Ext." or "x." in the extension field.  
Do NOT enter the standard "1" for long distance, or the "011" for international.
- 2.4 Social Security Numbers  
Do NOT use SSN for the ID field.  
Place it in the SSN field. (Enter 9 digits with no dashes.) Do not load UID's in the SSN field

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2.5

IDs

Do NOT use SSN for the ID field (or Alternate ID).

Use "U" as a prefix for IDs generated by Banner.

Do NOT place UID in the SSN field

2.6

Birth Date

Required for identification.



### 3.0 Other High-profile Fields

#### 3.1 Term/Year Designations (Quarter)

Format:

yyyymm where yyyy is the actual calendar year and mm is the term designation

Term designations are as follows:

80 = Fall  
20 = Winter  
30 = Spring  
40 = Summer

Special values (required by the system):

000000 = Beginning of Time  
999999 = End of Time

Examples:

200480 = Fall of 2004	(2004-2005 academic year)
200520 = Winter of 2005	(2004-2005 academic year)
200530 = Spring of 2005	(2004-2005 academic year)
200540 = Summer of 2005	(2004-2005 academic year)
200580 = Fall of 2005	(2005-2006 academic year)

#### 3.2 Term/Year Designations (Semester)

Format:

yyyymm where yyyy is the actual calendar year and mm is the term designation

Term designations are as follows:

80 = Fall  
30 = Spring  
40 = Summer

SOM Term designations are as follows:

45 = Term I  
15 = Term II

Special values (required by the system):

000000 = Beginning of Time  
999999 = End of Time

Examples:

200480 = Fall of 2004	(2004-2005 academic year)
200520 = Winter of 2005	(2004-2005 academic year)
200530 = Spring of 2005	(2004-2005 academic year)
200540 = Summer of 2005	(2004-2005 academic year)
200580 = Fall of 2005	(2005-2006 academic year)

## 4.0 General Person Changes

### 4.1 Creation of New Person/Non-person Records

#### 4.1.1 Creation of New Person Records

##### 4.1.1.1 Authority to Create

#### 4.1.2 Creation of New Non-person Records

##### 4.1.2.1 Authority to Create

### 4.2 Maintenance of Person Records

#### 4.2.1 Name Changes

##### 4.2.1.1 Authority to Maintain

##### 4.2.1.2 Process for Maintenance

#### 4.2.2 Address Changes

PR address type should always have an effective and active entry. Banner Self Service (SSB) will not allow the PR to be deleted, nor enter an effective end date.

##### 4.2.2.1 Authority to Maintain

Super-users are allowed to change INACTIVE flag.

##### 4.2.2.2 Process for Maintenance

#### 4.2.3 Phone Number Changes

##### 4.2.3.1 Authority to Maintain

##### 4.2.3.2 Process for Maintenance

#### 4.2.4 Social Security Number Changes

##### 4.2.4.1 Authority to Maintain

##### 4.2.4.2 Process for Maintenance

Must show Social Security card.

## 5.0 Person Search Techniques

### 5.1 Technique A (starting with an SSN)

If SSN is available...

- Step 1. Go to **GUIALTI** via either Direct Access  
or from **SPAIDEN** by clicking the Search dropdown following "ID"  
and selecting Alternate Id Search (**GUIALTI**).
- Step 2. Enter the SSN and execute the query.

If person not found or no SSN is available...

- Step 3. Starting at **SPAIDEN**...
  - In the key block, erase ID and tab to Name.
  - Enter last name followed by a comma (,) followed by first name; use wildcards (%) as deemed helpful.
  - *Note: this search is not case sensitive and ignores spaces and punctuation.*

If person still not found,

- Step 4. Click the Search dropdown following "ID" on SPAIDEN  
and select Person Search (**SOAIDEN**)
- Step 5. Click "Cancel Query" once (to enable the next step).
- Step 6. Use "Search Using Sounds Like" (**Soundex search**) from  
the Options pulldown to search for alternate spellings.

If no SSN match, try to verify via Birth Date, Middle Name, Address, Phone, etc. that the person retrieved is the correct person.

5.2 Technique B (starting with a name)

Step 1. Starting at **SPAIDEN**...

- In the key block, erase ID and tab to Name.
- Enter last name followed by a comma (,) followed by first name; use wildcards (%) as deemed helpful.
- *Note: this search is not case sensitive and ignores spaces and punctuation.*

If person is found, and SSN or Birth Date are available...

Step 2. Click the "Biographical" tab (SPAPERS) and verify the SSN/Birth Date and any other relevant data).

If person is not found,

If SSN or Birth Date is available...

Step 2. Click the Search dropdown following "ID" on SPAIDEN and select Alternate Id Search (**GUALTI**).

If SSN is available...

Step 3. Enter the SSN and execute the query (F8).

If Birth Date is available

Step 3. Enter the Birth Date and execute the query (F8).

If person is still not found,

Step 4. Click the Search dropdown following "ID" on SPAIDEN and select Person Search (**SOAIDEN**)

Step 5. Click "Cancel Query" once (to enable the next step).

Step 6. Use "Search Using Sounds Like" (**Soundex search**) from the Options pulldown to search for alternate spellings.

If no SSN match, try to verify via Birth Date, Middle Name, Address, Phone, etc. that the person retrieved is the correct person.

### 5.3 Name Searching Tips

#### Wildcard (%) usage:

- When there are common variations of a name
  - e.g., Chris% will find Chris, Christi, Christy, Christie, Christine, Christina...
  - e.g., Nan% will find Nancy, Nanette
- Whenever there are potential spelling variations or the input is unclear
  - e.g., S%fert will find both Seifert and Siefert
  - e.g., Anders%n will find both Anderson and Andersen
- At the end of a last name - will help detect hyphenated last names
  - e.g., Rather% will also find Rather-Knott
- Multiple wildcards may be used
  - e.g., Meyer%, Wil% will find "Meyers, Wilford" and "Meyer, William"

#### Assumptions on match/no match situations:

- **No match on SSN doesn't guarantee the person isn't in Banner.** The person may have been loaded without an SSN or with an incorrect SSN. Thus, a name search is also required.
- **A match on SSN doesn't guarantee the person is a match.** A transposition of digits, either upon current input or original loading can potentially create this situation. Thus, if the name match is very poor (e.g., only the first name matched), additional fields should be checked before assuming a name change.

## Appendices

### Appendix 1: Validation Table Ownership

<b>Table/Form</b>	<b>Description</b>	<b>Owner(s)</b>
GTVEMAL	E-mail Address Type	
GTVNTYP	Name Type	
GTVZIPC	Zip Code	
STVACYR	Academic Year	
STVASRC	Address Source	
STVATYP	Address Type	
STVBLDG	Building Code	
STVCAMP	Campus Code	
STVCITZ	Citizen Type	
STVCMTT	Comment Type	
STVCNTY	County Code	
STVCOLL	College	
STVDEGC	Degree Code	
STVDEPT	Department Code	
STVDLEV	Degree Level	
STVETHN	Ethnic Code	
STVETYP	Event/Function Type	
STVLEVL	Level Code	
STVMAJR	Major, Minor, Concentration	
STVMRTL	Marital Status	
STVNATN	Nation Code	
STVRELT	Relationship	
STVRESO	Residence Code	
STVSBGI	Source/Background	
STVSTAT	State/Province Code	
STVSTST	Student Status	
STVSTYP	Student Type	
STVTELE	Telephone Type	
STVTERM	Term Code	
STVTRMT	Term Type	

## Appendix 2: Name Types (GTVNTYP)

LGL	Legal (SSN)
PREF	Preferred
MAID	Maiden
AKA	Also Know As

*Note: A null name type is to be used until a specific name type applies.*

*Possible future type:*

*INTL International (Passport name)*

## Appendix 3: Address Types (STVATYP)

BI	<u>Bursar Mail</u> – for Bursar to send refund checks and 1098T forms.
BU	<u>Business</u> - reserved for Finance; (may have multiple occurrences active)
GR	<u>Grants</u> - used by Grants and Contracts for non-persons/companies
IN	<u>International</u> – used by the University Center for International Education
MA	<u>Mailing Override</u> - used by students and faculty/staff, when the "PR" address is still valid but the individual would like mail to be delivered elsewhere; may be a PO Box only; could be used to override an "RS" address
P2	<u>Parent/Guardian (2)</u> - when separate second parent's address is required
PA	<u>Parent/Guardian</u> - for students, as needed
PR	<u>Home/Permanent</u> - used by students and faculty/staff; to be the sole address for the majority of employees and students; should not be a PO Box only.
RE	<u>Remittance</u> - used by Finance, when different from the "BU" address
RS	<u>Resident Services</u> - reserved for use by Resident Services
SE	<u>Seasonal</u> - used by Advancement; the year portion of the effective dates are periodically updated via batch processes
SP	<u>Spouse</u>
WK	<u>Non-WSU Work</u>
WW	<u>WSU Work / office</u> - for faculty/staff or students
XX	<i>(reserved for use by TGRFEED)</i>

*Possible future types:*

*(?) TR Transcript*

*(?) SC Secured, physical (e.g. restraining order)*

*(?) NO No known valid address*

Typical address type search sequences:

Student mailings:	1MA, 2RS, 3PR
Student billings:	1BI, 2MA, 3RS, 4PR
Staff mailings:	1MA, 2PR

## Appendix 4: Phone Types (STVTELE)

Same as address types, plus the following:

CELL	Mobile/Cell
FAX	Fax
PAGE	Pager/Beeper

**Appendix 5: U.S. Postal Standards** (a derived summary)

[See <http://www.cedar.buffalo.edu/adserv>  
or <http://zip4.usps.com/zip4/welcome.jsp>  
for transforming an address to postal standards.]

Basic Format:

Recipient Line	John Smith
Delivery Address Line	123 E Main St Apt 321
Last Line	Dayton OH 45432-1234

Secondary Address Unit Designators (Apt., Ste., Unit, etc.):

Preferred location: at end of delivery address line.  
If unable to fit on delivery address line, place on line above.

Attention Line:

Place above recipient line.

Dual Addresses:

Place street address on line above "PO Box" line.

Punctuation:

Omit punctuation except hyphen in ZIP+4 (some exceptions).

City Names:

Spell out.  
A hyphen in a city name may be replaced by a space.

Military Addresses:

APO/FPO designation, followed by AE/AP/AA followed by ZIP+4.

Directionals:

N,S,E,W,NE,NW,SE,SW

Rural Route Addresses:

Use "RR n BOX nn" format.  
Convert RFD and RD to RR format.  
Do NOT use "Rural", "Number". "No." or pound sign (#).

Highway Contract Route Addresses:

Use "HCn BOX nn" format.  
Do NOT use words "Highway Contract", Route, Number, No., "Star Route" or pound sign (#).

General Delivery:

Spell out "GENERAL DELIVERY".



**Appendix 6: State/Province Codes (STVSTAT)**

AA	Armed Forces Americas
AB	Alberta
AE	Armed Forces Europe, Mid East, Canada
AK	Alaska
AL	Alabama
AP	Armed Forces Pacific
AR	Arkansas
AS	American Samoa
AZ	Arizona
BC	British Columbia
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia
DE	Delaware
FC	<i>Foreign Country</i>
FL	Florida
FM	Federated States of Micronesia
GA	Georgia
GU	Guam
HI	Hawaii
IA	Iowa
ID	Idaho
IL	Illinois
IN	Indiana
KS	Kansas
KY	Kentucky
LA	Louisiana
MA	Massachusetts
MB	Manitoba
MD	Maryland
ME	Maine
MH	Marshall Islands
MI	Michigan
MN	Minnesota
MO	Missouri
MP	Northern Mariana Islands
MS	Mississippi
MT	Montana
NB	New Brunswick
NC	North Carolina
ND	North Dakota
NE	Nebraska
NF	Newfoundland
NH	New Hampshire
NJ	New Jersey
NM	New Mexico
NS	Nova Scotia

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NT	Northwest Territories
NV	Nevada
NY	New York
OH	Ohio
OK	Oklahoma
ON	Ontario
OR	Oregon
PA	Pennsylvania
PE	Prince Edward Island
PR	Puerto Rico
PW	Palau
QC	Quebec
RI	Rhode Island
SC	South Carolina
SD	South Dakota
SK	Saskatchewan
TN	Tennessee
TX	Texas
UT	Utah
VA	Virginia
VI	Virgin Islands
VT	Vermont
WA	Washington
WI	Wisconsin
WV	West Virginia
WY	Wyoming
YT	Yukon Territory

**Appendix 7: Address Source Codes (STVASRC)**

EXT External Data Load  
WEB World Wide Web (self-service)

**Appendix 8: Citizen Types (STVCITZ)**

Y Citizen  
N Non-citizen  
P Permanent Resident  
PA Permanent Resident Asylee

**Appendix 9: Ethnic Types (STVETHN)**

10 White, non-Hispanic  
20 Black, non-Hispanic  
30 Asian or Pacific Islander  
40 Hispanic  
50 American Indian or Alaskan Native  
80 Other  
98 Foreign/Non-resident Alien  
99 Unknown

**Appendix 10: Marital Status Codes (STVMRTL)**

<null> Unknown  
D Divorced  
L Legally Separated  
M Married  
S Single  
U Unmarried *[and no distinction among single/divorced/etc.]*  
W Widowed  
P Separated *[but not verified as "legally separated"]*