

# Wofford College

## Banner Data Entry Standards and Guidelines

Updated May 8, 2006

### Reasons For Data Entry Standards

The effectiveness of a set of standards may be measured in terms of its purpose. It is the purpose of this set of data entry standards to:

- reduce duplicate personal identification records through reliable search for existing records,
- promote search capability through uniform data entry,
- promote reporting efforts based on presentation, retrieval and joins of the data, and
- promote uniform output for letters and other documents.

### General Guidelines

- Never store the percent symbol (%) in a data field.
- Never store the pound sign (#) in a data field.
- Never store the ampersand symbol (&) except in an address or business name.
- Enter all data using **mixed case** (uppercase and lowercase) and standard capitalization rules.
- Spell out all data unless it is necessary to abbreviate words to fit lines into the appropriate fields. For example, enter the first line of an address as “121 Main Street” rather than “121 Main St.” (A few exceptions are made for items in addresses.) Pre- and post-directionals are always abbreviated with no period. Example: 125 N Main Street or 125 Main Street N. (See Delivery Line Standards). In the street address line always abbreviate Mount (Mt.), Saint (St.), and Fort (Ft.). Examples: 321 Mt. Lebanon Road, 655 Ft. Mills Drive, or 744 St. Andrews Street.
- Enter **punctuation** in a name only when it is a part of the official name, or for a single character first name, or for an empty first name. Enter punctuation in the street address when abbreviations are used with the exception of pre- and post-directionals.

### Avoiding Duplicate Records

Creating a duplicate record for a person or organization for which a record already exists in Banner can lead to loss of data or incorrect results. It is extremely important to avoid creating duplicate records of this kind.

Before creating a new record for a person or organization, conduct an identification and name search to make sure the person or organization has not already been entered into the Banner system. Search for a person using social security number and all current and previous names, and also do a “soundex” search. Then verify that the correct record has been found by checking

the birth date and address. Only if no record is found should you add a new record.

**Example: To find Mac Donald, you must account for McDonald, Mc Donald, MacDonald, and Mac Donald. A search on M%D% will retrieve all of these records. Please use the method outlined on the appropriate job aid for name searches.**

## **Person and Non-Person Identifiers**

For both persons and non-persons, identification numbers consist of a unique nine-digit number. (This identification number is not the same as the PIDM or personal identification master, which is a system-generated number used to link together all tables related to one identification number.)

Identification numbers are generated by Banner using a 'W99999999' format (an 8-digit number beginning with 'W' to indicate that the number is a generated one).

## **Social Security Number**

Where possible, the social security number field should be entered. When the social security number is entered, a secondary ID record will automatically be stored with an alternate identification number consisting of social security number. There are numerous cases such as tape loads from other institutions in which use of social security number helps significantly to reduce duplicate person records.

- *Employees* are required to supply their social security numbers.
- *Students, admission, and financial aid applicants* will be asked to supply their social security numbers for identification purposes.
- *Donors'* social security numbers will be captured from their checks, if possible. Some searching will be done to locate the social security number of prospective donors.

Enter the entire nine digit number, omitting hyphens.

The Hyphen is not used.

Example: 544905332

Do not enter a SINOA number or a system generated ID number into the Social Security Number Field in SPAPERS. You MUST enter the Social Security Number in the appropriate field in SPAPERS.

## **Personal Name Standards**

### **Last Name**

All information is typed in upper/lower case format, i.e. not all caps or lower case letters.

Hyphens may be used to separate double last names (sometimes used in Hispanic names or by women who wish to utilize their maiden and married names, i.e., Cooper-Smith).

Apostrophes may be used in such names as O'Leary, O'Connor, etc.

Periods are not used in the last name field.

Commas are never used.

Do NOT use suffixes in the Last Name field since there is a separate field for suffixes.

Examples: III, Jr., etc., should never be used in the Last Name field.

### **First Name**

All information is typed in upper/lower case format, i.e., not all caps or lower case letters. Always enter the entire first name when available even if they prefer to use the initial of their first name and prefer their middle name.

Hyphens may be used.

Apostrophes may be used.

The period is used in the First Name field when the person indicates an initial rather than a full first name.

Example: E. Presley

No First Name If the person legally has no first name, enter a period.

Example: . Cher (first name, last name)

Preferred First Name should be left blank unless the person indicates they have a preferred first name.

### **Middle Name**

All information is typed in lower/upper case format, i.e., not all caps or lower case letters. Enter the entire middle name if available for identification purposes.

Hyphens may be used to separate double names.

Apostrophes may be used.

The period is used in the Middle Name field when the individual indicates an initial versus a full middle name.

Commas are never used.

Spaces are permitted between multiple names.

Example: Mary Ann

## Non-Person Name Standards

### Non-Person Name

All information is typed in upper/lower case format, i.e., not all caps or lower case letters. Enter the full legal name of the non-person. In general, company names should not be abbreviated unless the company has done so such as IBM. If space limitations require that a name be abbreviated, abbreviate the latter part of the name rather than the former.

Hyphens may be used to separate double names.

Apostrophes may be used.

The period may be used.

Commas may be used.

Spaces are permitted between multiple names.

Example: Georgia-Pacific Foundation, Inc.

W.W. Grainger, Inc.

J.P. Morgan & Co. Incorporated

NOTES: Ampersand "&" is used if it is part of the official name of the company, otherwise spell out "and".

Never use the word "The" in the company/business name.

### Individual Prefix Standards

If adding an individual for the first time and no prefix is specified, enter Mr. as a default for males and Ms. for females.

Prefix	Description
1LT	First Lieutenant
2LT	Second Lieutenant
ADM	Admiral
BG	Brigadier General
Bishop	Bishop
Bro.	Brother
CAPT	Navy Captain
CDR	Commander
CHAP	Chaplain
COL	Colonel
CPT	Army Captain
Coach	Coach

Dean	Dean
Dr.	Doctor
GEN	General
Father	Father
Hon.	Honorable
Judge	Judge
LCDR	Lieutenant Commander
LT	Lieutenant
LTC	Lieutenant Colonel
LTJG	Lieutenant Junior Grade
MAJ	Major
MSG	Master Sergeant
Miss	Miss
Mr.	Mister
Mrs.	Missus
Ms.	Ms
Prof.	Professor
Rev.	Reverend
SFC	Sergeant First Class
SGT	Sergeant
Sen.	Senator
The Rev. Dr.	The Reverend Doctor
	<b>Combined mailing names (only)</b>
	<b>Description</b>
1LT and Mrs.	First Lieutenant and Spouse
2LT and Mrs.	Second Lieutenant and Spouse
ADM and Mrs.	Admiral and Spouse
BG and Mrs.	Brigadier General and Spouse
CAPT and Mrs.	Navy Captain and Spouse
CDR and Mrs.	Commander and Spouse
CHAP and Mrs.	Chaplain and Spouse
COL and Mrs.	Colonel and Spouse
CPT and Mrs.	Army Captain and Spouse
Coach and Mrs.	Coach and Spouse
Dean and Mrs.	Dean and Spouse
Dr. and Mrs.	Doctor and Spouse
GEN and Mrs.	General and Spouse
Hon. and Mrs.	Senator, Governor, Judge and Spouse
Judge and Mrs.	Judge and Spouse
LCDR and Mrs.	Lieutenant Commander and Spouse

LTC and Mrs.	Lieutenant Colonel and Spouse
LTJG	Lieutenant Junior Grade
MAJ and Mrs.	Major and Spouse
MSG and Mrs.	Master Sergeant and Spouse
Mr. and Mrs.	Mister and Missus
Prof. and Mrs.	Professor and Spouse
Rev. and Mrs.	Reverend and Spouse
Sen. and Mrs.	Senator and Spouse

## Suffix Standards

Suffix	Description
(Ret.)	Retired Armed Forces
II	The Second
III	The Third
IV	The Fourth
Jr.	Junior
Sr.	Senior
V	The Fifth

## Address Standards

The address types and descriptions as approved at Wofford College are listed below. Note that the use made of a particular address type is really part of its definition.

An ‘internal’ address is one that contains only Wofford College campus addresses, whereas, an ‘external’ address contains addresses outside of the Wofford College campus.

### BI = Billing Address

The billing address is the alternate address to which bills from the Controller are sent. This address should not be entered unless the default for bills (PR or OC or some other) is not the desired destination of the bill.

### BS = Boarding School Address

This address is the Boarding School address used only by the Admissions Office to contact students for recruiting and applicant purposes.

### CA = Campus Post Office Address

This address should be entered on all students. They are assigned a campus post office box when they enter Wofford and this is their main address for internal and external mail.

### CM = Company Matching Gift Address

The CM address is used when the matching gift address for a company is different from the PR address.

**IN** = Invalid Address

Used only when no valid PR address is available. When no valid PR address is known (typically when a person has moved from their former PR address and has left no forwarding address), the IN address type is used. When a new PR address is found the IN address is inactivated and a new PR address is entered.

**K1** = Work Address 1 (WC)

The work address 1 is the primary campus address of college employees, and provides the location to which the employee reports. All employees should have this address type. This address type is entered for Wofford College employees only.

**MA** = Mailing Address

Not used at this time for official college mail. PR (Permanent Mailing Address) is being used instead.

**OC** = Local address (Off-campus)

For students, the local address is an **off-campus** address in the vicinity of the campus attended; it excludes residence halls and students living at home with parents.

Thus, students who live in an apartment in Spartanburg **will** have a local address even though their parents live in Spartanburg. However, students living with parents in Spartanburg, **will not** have OC.

Those students living on-campus will have their address listed under address type 'CA = Campus (CPO)'.

**PA** = Parent Address 1

Parent address 1 is the address of the parent(s) if not the same as the PR address. PA also can be used to list an additional parent.

**PB** = Parent Address 2

Parent address 2 is the address of additional parent(s) if not same as PR or PA addresses. It also can be used to list an additional parent.

**PC** = Parent Address 3

Parent address 3 may be used when one wishes to list an additional parent if not same as PR, PA, or PB.

**PH** = Primary Home

This address is used by Alumni/Development to maintain the home address when the PR Mailing Address is the work address.

**PR** = Mailing Address

This is the primary address presented by alumni, parents, friends, faculty, staff, students, companies, and foundations. For most, it is their permanent mailing address. The PR address (or an IN address) must always be present for every General Person record; its absence will cause processing errors in offices such as Controller, Admission, etc. It is the default address type for Admission and Financial Aid tape loads although it may not reflect a true permanent mailing address until the student applies for admission. The Controller uses this address for non-person records, as in third party billing.

A PR address *must* be entered for all person records. In order to keep a history of PR addresses for constituents, when a new PR address is found inactivate the old PR address and enter the date the inactivation was made. Enter the new PR address with the "From"/beginning date filled in.

**PW** = Primary Work Address

The primary work address is the primary employment address for constituents. Constituents may or may not have a PW address. It may contain internal (constituents who are employees of Wofford) or external addresses.

**PY** = Payroll Address

The Payroll address is the location to which payroll checks and deposit advice slips are sent. This address is initially populated from the K1 address, and subsequently maintained by the Payroll Office.

**RH** = Residence Hall Address

Residence hall address is the physical address for a student while living on campus.

**SA** = Study Abroad Address

The SA address is the address students use while studying abroad.

**SE** = Seasonal Address

The seasonal address is used to track seasonal addresses for constituents. Seasonal addresses are handled through a combination of data entry, and special monthly and yearly programming scripts. If a constituent reports having two or more addresses throughout the year, e.g., a winter home and a summer home, an SE address record is entered for each address for each consecutive group of months in the current calendar year, and one PR address is entered to reflect the constituent's current address. The yearly script changes the year in each SE address to reflect the current year, while the monthly script examines the SE addresses, and updates the constituent's current PR address.

**SH** = Secondary Home Address

The secondary home address is used to maintain a constituent's second home address. Constituents may or may not have an SH address, but a constituent should never have a SH address unless the constituent has a PR address (one can't have a secondary home address unless one has a PR address).

**SW** = Secondary Work Address

The secondary work address is used to maintain a constituent's second employment address. Constituents may or may not have a SW address, but a constituent should never have an SW address unless the constituent has an PW address (one can't have a secondary work address unless one has a primary work address). It may contain internal (constituents who are employees of Wofford) or external addresses.

**VR** = Vendor Remittance Address

Business remittance addresses are alternate vendor addresses to which payments only are directed. The address type is not required if payments are directed to vendor's regular business address (VU). Multiple business remittance addresses may be stored for each vendor, using sequence numbers in conjunction with the VR designator. A VU address *must* be entered for all non-person records.



## VU = Business Address

The Business address is the address to which purchase orders and other business correspondence is directed, and generally reflects the physical location of the vendor. This is the primary address type for storing vendor addresses in Banner, and all entities established in Banner initially as a vendor should have a VU address. Multiple business addresses may be stored for each vendor, using sequence numbers in conjunction with the VU designator.

## W2 = W-2 Address

The W-2 address is the address to which W-2 tax forms are sent. It is populated from the PR address at the beginning of each year, approximately January 1, and maintained by the Payroll office until W-2 forms are mailed. (This allows these addresses to be frozen during this period, reducing the possibility of erroneous addresses for W-2 mailings.)

## Emergency Contact Information

Emergency contact information about students or employees may be entered on the emergency contact form. The emergency contact information is not a true address type because the data is not stored in the regular address file, but in a file of its own. In an emergency, if no emergency contact information is found, attempts will be made to contact persons at the PR address or other addresses. (See Address Source Code Validation Table – STVASRC)

## U.S. Street Address Standards

### Guidelines

- Note that the post office reads an address from the bottom up. Thus, the most general information (country, state or province) is at the bottom of the address, while the most specific (apartment or room number) is at the top.
- For all US addresses, **enter the five-digit zip code before entering the city, county, or state**. If the zip code is entered correctly (and is in the GTVZIPC table), the city, county, and state are automatically displayed in the appropriate fields. This not only eliminates the need to key this information, but also ensures that it is correct. Note that you must enter the five-digit zip code only, then press the ENTER key (or the TAB key), which will cause Banner to fill in the city, county, and state. You can then return to the zip code to add the remaining digits.
- Leave the *country* field blank, i.e., do not enter "United States" in the country name field for United States addresses.

### Minimum Address

- USPS standards require that an address block contain as a minimum a recipient, a delivery address, and a last line. The attention line is optional.

Example: ABC Movers	<i>Recipient</i>
1500 Main Avenue	<i>Delivery Line</i>
Springfield VA 22152-41010	<i>Last Line</i>

- The delivery address should always contain a street number and street name. Addresses

simply listing a building name, or building name and room number, are usually improper.

- Data may be entered in all 3 lines of the Banner street address, and thus, some labels will have a total of 7 lines. Only address information may be entered in the three Banner street address lines.

#### *Format*

- Although USPS standards prefer uppercase letters for the **presentation** of all lines of the address block, address data should be **entered** in mixed case using standard capitalization rules.
- All words in the address should be spelled out in full with the exception of pre- and post-directionals and the exceptions listed below. However, if there is insufficient space in the data entry field to allow this, words may be abbreviated.

Apartment = Apt.

Building = Bldg.

Department = Dept.

Floor = Fl.

Room = Rm.

Suite = Ste.

Unite = Unit

*Other exceptions:* Always abbreviate Mount (Mt.), Saint (St.) and Fort (Ft.) in the street address line. Example: 125 Mt. Lebanon Road; 321 St. Andrews Street; 744 Ft. Mills Avenue.

- Use **hyphens** and **slashes** in addresses when needed for clarity or designated fractions.

Example:           Mid-Island Plaza  
                          101 1/2 Main Street

- Use the **Ampersand (&)** instead of the word ‘and’ only if that is the proper spelling.  
Example: 1500 King & Queen Way

#### *Secondary Designators*

- Secondary designators, such as suite or apartment numbers, should be on the same line as and at the end (to the right) of the delivery address. If the correct designator is unknown, use only the number. Always use the abbreviation “Apt.” rather than spelling out the word “Apartment.”

Examples:           102 Main Street, Apt. 101  
                          102 Main Street, Suite 101  
                          102 Main Street, Room 101

- If there is not enough space on the delivery line for the secondary designator, place it on the line **above** the delivery line, not below it.

Example:           Mr. Michael Murray  
                          Apt. C  
                          5800 Springfield Gardens Circle  
                          Springfield VA 22152-1058

### *Attention/Care of Line*

- If possible, avoid using an attention or “care of” line. Reorganizations or turnover can make them obsolete quickly.
- If an attention line is necessary, try to use only an office or title rather than a name. Thus, “Attention: Treasurer” is preferable to “Attention: Joseph Deters, Treasurer” because the former does not become obsolete when a new treasurer is elected.
- If an attention line is necessary, enter the address as provided by the company or organization. Some common examples are:

Attention: John Doe XYZ Company	XYZ Company c/o John Doe	<i>Attention Line Recipient</i>
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### *Dual Addresses*

If a mailing file contains both a physical address (street number and name) and delivery address (P.O. Box), place the P.O. Box immediately above the last line.

Example:            Mr. John Doe  
                         1201 Broad Street  
                         P.O. Box 1001  
                         Falls Church, VA 22042-2102

### *Delivery Line Standards*

The standard layout for the Delivery Line is:

- |                                 |   |
|---------------------------------|---|
| a) primary address number       | numerical, not word                       |
| b) pre-directional              | N (North), E (East), SW (Southwest), etc. |
| c) street name                  | normally not abbreviated                  |
| d) suffix                       | Street, Drive, Circle, etc.               |
| e) post-directional             | N (North), E (East), SW (Southwest), etc. |
| f) secondary address identifier | Apt., Room, Suite, etc.                   |
| g) secondary number             | numerical, not word                       |
- The USPS prefers use of pre-direction and post-direction abbreviations without a period. These describe the geographic direction before and after the street name. Directionals should be spelled out only when they are part of the street name.

Example:            625 S Main Street  
                         1501 Southwest Freeway  
                         101 West Drive  
                         202 County Road NE  
                         303 Bay West Drive  
                         500 Bay Drive W

Exception:        429 North Church Street (this is the official address for WC and North is spelled out on all letterhead, envelopes, etc.)

- The preferred delivery line for Rural Route designations is RR. Example: RR 2 Box 18 with no punctuation.

### *Post Office Boxes*

Always abbreviate **Post Office Box** as **P.O. Box**. with no space between the P.O.,space Box.

### *Private Mailbox Addresses*

Private companies offering mailbox rental service to individuals or businesses may require a “box” number called a **mailstop code (MSC)** for the final mail sort. Print the MSC above the recipient's name or in the attention line as shown in the example below. Since the MSC is not a post office box, the words “P.O. Box” followed by the MSC may not be used on the delivery address line. Only the USPS is entitled to provide delivery to a P.O. Box.

Example:                   MSC 1587  
                              ABC Company  
                              12 E Main Avenue  
                              Blacksburg VA 24060-4544

### *Last Line Standards*

Use the official USPS City or Place name as contained in the USPS postal database. Whenever possible, spell City or Place names in their entirety. Where abbreviation is required due to label or field size, follow the same standards for suffixes or directional words.

Example:                   West Stockbridge    to    W Stockbridge  
                              Newberry Springs   to    Newberry Spgs.

### *US Zip Codes*

Enter the five-digit zip code; if you have the last four digits, enter a hyphen and then these last four digits.

Examples:                24060  
                              24060-6363

## **International Addresses**

### *General Guidelines*

- Enter all foreign address information in the 3 street address lines. Thus, for all foreign addresses, including Canadian addresses, put CITY, PROVINCE, PIN on the next available street line. Enter the international PIN number (without hyphens) to the right of the city and province.
- For foreign addresses, no data should be entered in the state or ZIP code fields. **Do NOT enter the international PIN number in the ZIP code field.**
- Enter a dot (.) in the city field to satisfy the requirements of Banner. Mailing labels generated through our reporting tool can strip out the dot in the city field.

Example:                Petko Metodiev Kitanov  
                              POB 140  
                              Balgoevgrad, Hyderabad 2700  
                              .  
                              BULGARIA

### Military Address Standards

- Format military addresses for destinations **within** the United States in the same way as any other mail.
- For military addresses **outside** of the United States:

In the city field, enter the APO or AFO code

In the state field, enter AE - Europe, Middle East, Africa or Canada (ZIP=09nnn)

AP - Pacific (ZIP=96nnn)

AA - The Americas (excluding Canada) (ZIP=34nnn)

Example:

Alice VanFrogulemen

HHB 6th Battalion 43rd Box 72

Air Defense Artillery CMR 417

APO, AE 09602-8802

### Residence Hall (Student) Addresses

Residence hall addresses are automatically loaded from the Housing system. These addresses should *not* be updated manually. The following information is provided for reference only.

Line 1 of the address contains the name of the building, a comma, space, the word “Room,” space, and the room number. Lines 2 and 3 are not used. The City field contains “Campus Mail,” the State field contains “SC,” and the zip code is set to “00000”. The County and Nation fields are not used.

Example:

Line 1: Greene Hall, Room 202

Line 2:

Line 3:

City: Campus Mail

County:

State: SC

Zip: 00000

### E-mail Address Types

(See Email Type Validation Table – GTVEMAL for descriptions.)

### Telephone Number Standards

(See Telephone Type Validation table – STVTELE for descriptions.)

Enter the telephone number in the fields as follows:

**Area Code** Enter the three-digit area code for all phone numbers.

**Phone Number** Enter the seven-digit number without hyphens.

**Extension** If an extension number is provided, enter only the digits of the extension in the extension field. Do not enter “EXT” or “X” in this field.

Example: 703-231-7865 extension 2114

Enter:	Area	703
	Number	2317865
	Extension	2114

## Date Standards

- Except for special cases defined below, enter dates into Banner in **mmddy** (or **mmddyyy**) format.
- Dates also may be entered as dd-mon-yyyy or dd-mon-yy where mon is the abbreviation for the month, e.g., 12-Dec-1994, or 12-Dec-94. Hyphens must be used between the day, month and year.
- If the correct date is not known at time of data entry leave the field blank, assuming that the date field is not required.

## Gender Code Standards

Rather than asking the user to enter a code for gender, Banner displays buttons with three choices:

Male

Female

Not Available

Click on the appropriate button to enter gender information.

## Citizen Code Standards

(See Citizen Type Validation table – STVCITZ for descriptions.)

## Ethnic Code Standards

(See Ethnic Code Validation table – STVETHN for descriptions.)

## Marital Code Standards

(See Marital Status Validation table – STVMRTL for descriptions.)

## Religion Code Standards

(See Religion Code Validation table – STVRELG for descriptions.)

## Legacy Code Standards

A Legacy Code identifies a relative with whom Wofford College had or has a relationship. For example, if your mother is an alumnus of Wofford, your legacy code would be "M" for mother.

If available, the legacy's name should be entered into a comment field on the form SPACMNT. Use the comment type: LEG

(See Legacy Code Validation table – STVLGCY for descriptions.)

**This document is meant to be a *working* document that will evolve as the SCT Banner project progresses at the college.**

**The standards are meant for all records entered into Banner including students, vendors, alumni, parents, friends, corporations, foundations and others.**