CUNY Graduate School  
Information Technology  

IT Banner Data Entry Standards  
Last Updated: March 16, 2015

The GC Banner Users Committee has promulgated these standards to be used by all those who enter data into Banner.

Introduction

Data entry must be consistent and in compliance with established standards to ensure data integrity, avoid duplication of records and to simplify searches. Entered data must also be accurate and professional in appearance when acted upon by a variety of processes, used for decision-making, reported on and inserted into electronic documents and correspondence. Additionally, with Banner 7, Common Matching has been implemented, making it very important that standards are adhered to so that the common matching process can work as designed and desired.

This document includes the following sections:

- General Guidelines
- Terms
- Names
- Addresses
- Telephone Numbers
- E-mail
- Gender
- Vendors

These standards represent agreements adopted and implemented by the GC Banner Users Committee.

Section 1: General Guidelines

Punctuations:

- With regard to names, addresses and validation tables do not introduce a space at the beginning of a field or before and/or after a hyphen.
- With regard to names, addresses and validation tables, the pound sign (#) and the ampersand sign (&) and the comma (,) are not to be used (unless part of organization name) in any data field as they can actually cause program failure.
Subject to specific exceptions noted below, other punctuation marks not to be used include the following: Parenthesis: ( ) double quotation: “ equals: = brackets: [ ] ellipsis: ... colon: : semi-colon: ; percent: % slashes: / hyphen: - apostrophe: '

Specific Exceptions:

- Forward Slash (used in address field, for c/o only)
- Hyphen (used in name field for hyphenated name only; for example, DayeSmith or when the entire nine-digit Zip Code is available)
- Apostrophes, Commas and Ampersands (if part of the legal name only; for example Keddy’s Hotels & Restaurants)

Cases and Spaces:

- Data is entered using title-case format (uppercase and lowercase letters) and standard capitalization rules.

Section 2: Terms

General

The academic year will be broken up into designated divisions, as follows:

- For The Graduate School:
  - Fall Semester will end with 90 after the year
  - Spring Semester will end with 20 after the year
  - Summer Term will end with 70 after the year
- For The School of Professional Studies:
  - Fall Semester will end with 91 after the year
  - Spring Semester will end with 21 after the year
year - Summer Term will end with 71 after the year

- For CUNYBA:

- Fall Semester will end with 90 after the year
- Spring Semester will end with 20 after the year
- Summer Term will end with 70 after the year
- Winter Term will end with 10 after the year

Section 3: Names

General

- Legal names are to be entered as presented in valid documented sources (for example, Social Security Card, official transcripts, business letterhead, etc.). If clarification is needed for an individual not yet in Banner, please contact the person.

- It is of utmost importance, in order to avoid creating duplicate PIDMs that a rigorous wildcard search is done before creating a new record (see the Banner Common Matching document in the IT Knowledge Base).

- If an entity provides their name in all capital letters, capitalize the first letter of the first and last name, and de-capitalize all other letters.

- If you come upon a pre-existing record that has the name spelled differently, but appears to be an obvious match, the user who makes the discovery should contact the 'source' of the record to see if s/he can help clarify the correct spelling, or to agree on a plan of action for getting clarity.

- All character data entry must be done in upper and lower case.

- Foreign characters in names and addresses are replaced with their closest ASCII equivalent.

- Admitted GC and Journalism students may submit a preferred first name form to the Office of the Registrar. The office will record the preferred first name in Banner and this first name will appear on class rosters and in self-service (with the exception of the transcript).

- Banner allows up to 60 characters for first name and an additional 60 characters for middle name; if either name is more than 60 characters enter as many as possible.

Prefix

- Prefixes in use are:

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Definition</th>
</tr>
</thead>
</table>

- If provided, always enter the 'Prefix' (professional title) using the exact words or abbreviations in the table above.
- Do not use punctuation - do not type a period.
- When a 'Prefix' is not provided, it is especially important that an entry is made in the 'Gender' field.

**Suffix**

- Suffixes in use are

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Esq</td>
<td>Esquire</td>
</tr>
<tr>
<td>II</td>
<td>The Second</td>
</tr>
<tr>
<td>III</td>
<td>The Third</td>
</tr>
<tr>
<td>IV</td>
<td>The Fourth</td>
</tr>
<tr>
<td>Abbreviation</td>
<td>Full Form</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------</td>
</tr>
<tr>
<td>JD</td>
<td>Doctor of Jurisprudence</td>
</tr>
<tr>
<td>Jr</td>
<td>Junior</td>
</tr>
<tr>
<td>LCSW</td>
<td>Licensed Clinical Social Worker</td>
</tr>
<tr>
<td>LSW</td>
<td>Licensed Social Worker</td>
</tr>
<tr>
<td>MD</td>
<td>Doctor of Medicine</td>
</tr>
<tr>
<td>MD,FACC</td>
<td>Doctor of Medicine, Fellow of the American College of Cardiology</td>
</tr>
<tr>
<td>PhD</td>
<td>Doctor of Philosophy</td>
</tr>
<tr>
<td>Sr</td>
<td>Senior</td>
</tr>
<tr>
<td>V</td>
<td>The Fifth</td>
</tr>
</tbody>
</table>

- Suffixes are entered in the Identification Form in the suffix field.
- Do not use punctuation - do not type a period.
- Do not enter suffixes in the name fields.
- Enter a suffix only when identified by the individual.
- Always use normal title-case format (uppercase/lowercase letters), and follow standard capitalization rules when entering a suffix.
- If no suffix is provided the field remains blank.
- Generally, a suffix should not convey the same meaning as prefix, as this can lead to awkward presentation on correspondence.
  - For example, the following may not be desirable:
    - Dr. Robert Yanckello Ph.D.
    - Atty. Mary Wood Esq.

**Section 4: Addresses**

**General**

- The Graduate School has adopted the use of Clean Address for domestic addresses; this utility converts addresses into standard conventions and USPS protocols. Therefore, specific data entry standards are not provided herein.
• Address Types in use are:

<table>
<thead>
<tr>
<th>Address Type</th>
<th>Description</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>BI</td>
<td>Billing</td>
<td>Used by purchasing department</td>
</tr>
<tr>
<td>BU</td>
<td>Business</td>
<td>Used by purchasing department</td>
</tr>
<tr>
<td>MA</td>
<td>Mailing</td>
<td>Used by Student Services</td>
</tr>
<tr>
<td>PA</td>
<td>Parents</td>
<td>Not currently used</td>
</tr>
<tr>
<td>PR</td>
<td>Permanent</td>
<td>Used by Student Services</td>
</tr>
<tr>
<td>RA</td>
<td>Remittance Address</td>
<td>Used by Accounts Payable department</td>
</tr>
<tr>
<td>SA</td>
<td>SEVIS Overseas Address</td>
<td>No longer used by International Students – as of 2015</td>
</tr>
<tr>
<td>SU</td>
<td>SEVIS US Address</td>
<td>No longer used by International Students – as of 2015</td>
</tr>
<tr>
<td>XX</td>
<td>Reserved for TGRFEED Use Only</td>
<td>Not currently used</td>
</tr>
</tbody>
</table>

**US Domestic Addresses**

• Enter the Zip or Postal Code, and then use 'Tab' to move out of the field; the city, and county automatically populate. Use a hyphen in a 9 digit zip code; for example 12345-6789.
• If avoidable, do not use address line #3 as some laser labels have space restrictions that can't pick up the information in address line #3. If the instance at hand doesn't relate to laser labels, it is up to the user decide whether to enter the information in line #3 or not.
• Abbreviate 'In Care of' as c/o in lower case. Place it on the first address line.

  o For example:

    • In Care of Elvis Presley
    • ADDRESS LINE 1: c/o Elvis Presley
    • ADDRESS LINE 2: 123 Graceland Boulevard
International Addresses

• It is permissible to use commas to separate those 'additional' parts of an international address.
• International zip codes must be manually entered.
• Do not input any information into the State field.
• Enter the appropriate code for the country in the Nation Code field.
• Nation codes are validated against the Nation Code validation table (STVNATN). Should you need to enter a nation code that is not found in the table, contact Student Services.
• When the city-related data (city, county, foreign postal code) is nonconforming, the following data entry standards apply.

  o For example:
    ▪ University of NSW - Kensington Colleges
    ▪ PO Box 24
    ▪ Kensington NSW 2033
    ▪ AUSTRALIA ○ Enter:
      ▪ ADDRESS LINE 1: University of NSW - Kensington Colleges
      ▪ ADDRESS LINE 2: PO Box 24 ○ ADDRESS LINE 3:
        ▪ CITY LINE: Kensington NSW 2033
        ▪ NATION CODE: AS

• City data must be entered in the City field. If additional space is needed, use Address Line 3 as a last resort. ○ For example:
  ▪ Kensington NSW ○ Enter:
    ▪ CITY LINE:
      Kensington NSW

• Postal Codes should be entered according to the address standards of the foreign country. For most countries (e.g., England, Australia), the codes are entered after the city on the city line; for some countries (e.g., Germany, Switzerland), the codes are entered before the city on the city line.
  ○ For example:
    ▪ Kensington NSW 2033 ○ Enter:
      ▪ CITY LINE:
        Kensington NSW 2033

• City, county and postal code data should all be entered on the city line when possible. If these elements will not fit into the city line, enter the city on address line 3 and the county and postal code in the city field.
  ○ For example:
    ▪ Kensington New South Wales 2033 ○ Enter:
      ▪ ADDRESS LINE 3: Kensington
Foreign addresses printed by Banner will be formatted as follows:

- ADDRESS LINE 1
- ADDRESS LINE 2
- ADDRESS LINE 3
- ADDRESS CITY LINE
- NATION
- DESCRIPTION

International Addresses (Applicable for PR (Permanent), MA (Mailing) and RA (Remittance) address types)

- Follow the guidance provided above for the SA address type, avoiding the use of Address Line 3 whenever possible due to space constraints on mailing labels

Section 5: Telephone Numbers

Creating Standard US Telephone Information

- We currently support only one telephone number entry per person in our Banner environment. Therefore, we do not identify Phone Types.
- The format is as follows:
  - PHONE FIELD 1 Area Code (3 digits)
  - PHONE FIELD 2 Phone Number (7 digits)
  - PHONE FIELD 3 Phone Extension (4 digits, if available)

Creating International Telephone Information

- For international phone numbers, use the free form International Access field within Telephone tab in SPAIDEN.
- The format is as follows:
  - Enter the country code without the 0 or 001
  - Enter the city code
  - Enter the phone number

Section 6: E-mail

- The following E-mail types are in use:
<table>
<thead>
<tr>
<th>Email Type</th>
<th>Description</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADM</td>
<td>GSUC Admissions</td>
<td>Used by Admissions</td>
</tr>
<tr>
<td>CBA</td>
<td>CUNY BA E-mail</td>
<td>Used by CUNY BA</td>
</tr>
<tr>
<td>GC</td>
<td>Graduate School Email</td>
<td>Populated by Batch process</td>
</tr>
<tr>
<td>HR</td>
<td>HR Email account</td>
<td>Used by HR office for</td>
</tr>
<tr>
<td>JOUR</td>
<td>Journalism Email</td>
<td>Set aside for School of</td>
</tr>
<tr>
<td>MNGR</td>
<td>Fund Manager Email</td>
<td>Used by Business Office to</td>
</tr>
<tr>
<td>PERS</td>
<td>Personal Email account</td>
<td>Used by School of</td>
</tr>
<tr>
<td>STUD</td>
<td>Student Email account</td>
<td>Not currently in use</td>
</tr>
<tr>
<td>PO</td>
<td>Vendor Email</td>
<td>For use with FormFusion</td>
</tr>
<tr>
<td>MISC</td>
<td>Miscellaneous Receipt</td>
<td>For use with FormFusion</td>
</tr>
</tbody>
</table>

• Use the following standards to create email addresses:
  o EMAIL TYPE: select Email Type
  o EMAIL ADDRESS: Type in the email address that has been provided to you by the individual or vendor.
  ▪ Example: FLastname@hotmail.com

Section 7: Gender

• The following abbreviations are in use:

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>Male</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>F</td>
<td>Female</td>
</tr>
<tr>
<td>NA</td>
<td>Not Available</td>
</tr>
</tbody>
</table>

- Always enter 'Gender' when you have this information.

**Section 8: Vendors**

**Vendor Names**

- If the vendor is an individual, always use the last, first, and middle name fields and not the corporation nonperson field on form FTMVEND. The vendor should provide his or her legal name for tax reporting purposes. Follow the data entry standards for the name creation above. Note: 'non-Person' and 'corporations' are the same. Most modules use the term 'non-person' while the Finance module also uses the term 'corporation'.
- If the vendor is a Non-Person or Corporation, Vendor Names entered should appear exactly as shown on the IRS Form W-9. If the vendor is generally recognized by initials and uses those initials on invoices and letterhead, use those initials when entering the vendor name. These initials should be entered in upper case. Do not place a space between the initials.
  o Example: AT&T, US Steel, IBM
- Where abbreviations of non-person or corporation names are necessary due to the length of the name, abbreviate with standard USPS abbreviations: http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf  o Example:
  ▪ AAUP would be entered as American Assn of Univ Professors
- A company with initials should not have a space between the initials. Do not use periods or commas.
  o Example: JC Penney Co
- Use 'The' if the vendor name starts with it.
  o Example: The Book House
- Use dashes and slashes only when they are a part of the vendor name. Do not use spaces between dashes and slashes. Never use commas.
  o Example: Mail-well Envelope Co B/B Contractors Supply
- Use the ampersand sign (&) instead of the word 'and' when appropriate.  o Example: AT&T
- Do not capitalize 'a', 'an', 'the', 'of', 'for', 'to', 'etc.', when used in the vendor name.
  o Example: Snowy Egret Designs of New York

**Vendor Addresses**
Follow the conventions identified above for addresses for individuals.