

Okanagan College Data Standards Guide

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ABOUT THIS GUIDE

Who Should Use This Guide?

It is vital that anyone editing or adding data into any database comply with these standards to ensure data remains consistent throughout that particular system, as well as across the organization. Although some of the standards arose from the Banner system (e.g., address type codes) they apply to all databases across the organization. As Banner is the primary repository for Okanagan College data, examples that pertain to Banner exclusively will be highlighted.

This document is a combined effort of the Human Resources and Labour Relations department, the Finance department, Office of the Registrar, Records and Information Systems and is an agreed upon list of standards for the new Okanagan College. *If additional Data Standards need to be created, please contact dmatheson@okanagan.bc.ca. Changes, additions and deletions must be approved by the Banner Application Review Committee (known as BART).*

Minimum Data Requirements

As there are many disparate data sources across the organization, it is imperative for data consolidation to gather enough information on a student, employee, vendor or other entity to establish its uniqueness.

Note: Please refer to the rest of the document for the actual standard for each of the required data elements.

The following data elements are mandatory when entering a Student Entity:

- Full Legal Name (First, Middle, Last Name)
- Date of Birth
- Identification Number (in this case the Banner ID. If it exists, please collect this number, if ID does not exist, one must be created)
- Full Permanent Address
- Mailing Address, if different than their permanent address
- Provincial Education Number (PEN)
- Gender

The following data elements are mandatory when entering an Employee Entity:

- Full Legal Name (First, Middle, Last Name)
- Date of Birth
- Identification Number (in this case the Banner ID. If it exists, please collect this number, if ID does not exist, one must be created after a thorough search of the Banner database: see Search Document)
- Social Insurance Number
- Permanent Address
- Mailing Address, if different than their permanent address
- Gender

The following data elements are mandatory when entering a Company or Vendor Entity:

- Full Legal Name of Person or Company
- Date of Birth, if a person
- Identification Number (in this case the Banner ID. If it exists, please collect this number, if ID does not exist, one must be created)
- Social Insurance Number, if a person
- Permanent Address
- Mailing Address, if different than their permanent address

What is Banner?

Banner is the name of the integrated software purchased from the Sungard SCT Corporation. Banner offers Okanagan College a tremendous increase in the quantity and quality of information it can maintain as well as increased accessibility to that information, enhanced data security and compatibility across functional areas of responsibility.

Banner is modular, meaning there are modules for different functional areas. There is a Finance module, a Payroll/Human Resources module, and a Student module. There also is a General module that ties all the functional modules together. A person's ID number, name, address, etc... is contained within the General module and is shared by the other modules.

What Data Is Covered In This Guide?

Data that is covered in this document includes Names of Companies, Names of People, Addresses, Telephone Numbers, Provincial Education Numbers and code lists.

Terms Used in This Guide

Entity:	Any person, company, student or employee that requires an identification number in the Banner system.
Person:	Entities that are students or employees. Not companies.
Non-Person:	Entities that are set up as companies, vendors, banks, and agencies. Not students or employees.
Address Type:	Each entity (person, company, and student) can have one or more addresses. Each address is given a <i>type</i> . For example: permanent, mailing, billing.
Telephone Type:	Each entity (person, company, and student) can have one or more telephone numbers. Each telephone number is given a <i>type</i> and must be associated with a specific address. For example, permanent, mailing, cell.

ENTITIES

It is extremely important that the database be thoroughly searched before new entities are added. This reduces the chance that a single entity will have more than one identification number within the database. A report is run every night in IT Services which identifies possible duplicates. The report will be circulated to those areas that create Banner IDs and where duplicates are identified, they will be corrected as soon as possible. To promote the increasing need for good data integrity, a policy on Data Integrity is being drafted, the Search Document has been created (see Appendix B) and training sessions will be held several times a year.

PERSONS

When entering the names of *persons* into the database, always use the *full legal name*. Enter the first name into the first name field, middle name into the middle name field, and surname into the last name field. Use conventional upper and lower-case letters.

Standards for Entering Last Names

- Do NOT use spaces within prefixed last names. No exceptions are permitted.
For example: St.John O'Connor DeBolt McDonald VanHusen DuShen
- Do NOT enter hyphenated last names with spaces.
For example: Smith-Collins
- Names which contain spaces such as “Yin Chen” or “Born With A Tooth” may be entered with the spaces. This person would likely not have a first name entered.
- All last names should start with a capital letter. If the person insists on a lower case first letter (such as for traditional Welsh surnames that do not use capital letters), then use the lower case first letter.
- Do NOT include suffixes, or nicknames, in the name fields. Use the suffix and/or prefix fields.
For example: Jr., II, Sr. (must be entered in the suffix field)

Standards for Entering First Names

- For preferred first names (such as Bob, Bill, Dave), use the field ‘preferred first name’. If a person insists that all documentation, including cheques, be made out to a “nickname” it is acceptable to treat the nickname as the legal first name. If possible, obtain the legal name and enter it into the ‘legal name’ field.
*For example: Full Legal Name: John James Jones
Last Name: Jones
First Name: JJ
Middle Name:
Pref. First Name: JJ*

Within the Banner database, the ‘preferred first name’ and ‘legal name’ fields may be found on the form SPAIDEN in the Student module, on the form PPAIDEN in the Human Resources module, and the FOAIDEN in the Finance module.

Standards for Entering Middle Names

- If the entire name is available, enter the entire middle name. If only the middle initial is available, enter it without a period. (Do NOT enter a period when entering the middle initial)
- For *persons* who commonly go by their middle name and who wish cheques and other documents to have their names addressed as such, enter the first initial and the middle name in the first name field.
For example: First Name: *R.Maureen** (Enter a period after the first initial but Do NOT enter a space after the period).
Middle Name: remains blank

In this case, you would want to also enter their full legal name in the 'legal name' field. For the above example, full legal name: Ruth Maureen Jones

- If there is more than one middle name and there is room for both, enter both in the middle name field. If there is not room, only enter one. Enter only the first name in the First Name Field and the last name in the Last Name field. Do not try to “squeeze in” additional middle names in other fields.

Standards for Entering Full Legal Name

- If the full legal name has been used in the first, middle, and last name fields – it is NOT necessary to enter the names again in the ‘legal name’ field.
- Situations where you would want to enter in the full legal name include:
 - When persons use their middle name as their first name see example of R.Maureen*, above

Entering Preferred First Name

- If someone prefers, for example, Betty or Liz instead of their legal first name of Elizabeth, the name can be entered in the “Preferred First Name” field. (for information purposes only – we do not populate reports or letters with this field)

NON-PERSONS

When entering the names of *non-persons* into the database, always use the full legal name. The following standards closely follow the Address Standards to ensure consistency of approach. Use conventional upper and lower-case letters.

Standards for Entering Non-Person Names

- Use upper and lower case letter for all *non-person* names
- Within the Banner database, the *Non-Person* name field is 60 characters in size, and thus should accommodate all but unusually long names.

Abbreviations

- Abbreviations **shall NOT** include punctuation.
- The following common abbreviations are to be used:
 - Ltd (Limited)*
 - Corp (Corporation)*
 - Inc (Incorporated)*
 - Co (Company)*
 - Assoc (Association)

Special Symbols

- Hyphenations WILL be included where the *Non-Person* name indicates. Spaces shall NOT be included with these special symbols.
 - For example: Bi-Rite Drugs, A-1 Steam Cleaners*
- The “&” sign WILL have spaces associated with it.
 - For example: A & W Restaurants, Thauberger & Associates*
- The “/” sign WILL be retained, but with NO spaces associated.
 - For example: Anderson/Fast Marketing*
- Quotations shall NOT be used around a *Non-Person* name.
 - For example: Drapery Difference (not “Drapery Difference”)*

PER CANADA POST: Do not use the number symbol (#) or the French symbol for number (No) in addresses.

- *Non-Person* names that are an acronym shall NOT include the punctuation between the identifying letters.
 - For example: OUC (not O.U.C. or O U C)*
 - CNIB (not C.N.I.B.)*
 - ACCC (not A.C.C.C.)*
 - P Lawson (not P. Lawson)*
- Apostrophes are significant and WILL be used.
 - For example: Andrian’s Family Restaurant, Antique’s ‘N Things, St John’s*

“The” Word

- *Non-Persons* that begin the “THE” shall retain the word for significance.
For example: The Keg, The Sony Store, The Bay

Parenthesis

- The () in a name should be maintained.
For example: Band City Chev Olds (1974) Ltd
Harmony Records (1980) Ltd

Capitalized Name

- Some hyphenated names are not quite so clear. This became clear with Co-Operatives, and we have chosen to use:
Outdoor Sporting Goods Co-Op Ltd (not Coop, or Co-op)
Co-Operators Insurance (not Cooperators, or Co-operators)

Dates

- All dates must be entered in the format of **dd-mon-yyyy**. Hyphens must be between Day-Month and Month-Year (For the Banner database, the field has to entered in this format)
For example: Date of June 1, 1999 must be entered as 01-Jun-1999

ADDRESSES

An entity (person or non-person) may have multiple addresses within the database. Within the Banner database, each address is designated an *address type*. An employee may have a Campus address (with an address code of CA), and a Mailing address (with an address code of MA). A vendor or company will have an Accounts Payable address (with an address code of AP).

The following address codes are used within the Banner database, at the new Okanagan College:

<i>AP</i>	<i>Accounts Payable Address</i>
<i>BI</i>	<i>Billing Address</i>
<i>BU</i>	<i>Business Address</i>
<i>CA</i>	<i>Campus Address</i>
<i>MA</i>	<i>Mailing (Local) Address</i>
<i>PA</i>	<i>Permanent Addresses</i>

Entering Addresses

- Each address must consist of an address type, one street line, a city, either a province or a nation, and a postal code. Province and State codes **MUST** be entered for all Canadian and United States addresses.
- Enter the province into the 'State/Prov' field. Enter the postal code into the 'Zip/PC' field. Do **NOT** enter a Nation code for Canadian addresses
- An address is valid where today's date is between the 'From' and 'To' date fields (Note: if the 'To' date field is blank, the address is still valid).

Change of Address

- Change of address must be submitted in writing. Depending on how your database stores address information, you can either create a new address entry or overwrite the address entry (if the system permits only 1 address).

For the Banner database:

- When notification is received that an address is no longer valid, enter the date of notification in the 'To' date field of that address. **Do not de-activate addresses.**
- **Addresses are never deleted.** You make the old address ineffective by editing the 'To' date and then you insert a new address record.
For example: If an employee changes their MA address, the person editing that record must first close the existing MA address by entering an address end date in the 'To' field and saving the changes. The new MA address may then be created.
- **Never type the new address over the old address.** Again, make the old address not effective by editing the date fields and then add another address.
- The 'Sequence Number' will increase automatically when a user creates a new address. The sequence number begins at one for each address type. (For example: A student may have three MA addresses, and each would have a sequence number 1,2,3. *Only one of the MA addresses could be valid.* The student may also have a number of PA addresses, and each would have a sequence number 1,2,3,etc. *Only one of the PA addresses could be valid.*)

Banner Address Types and Use

Only ONE address for each address type can be valid at any time. The exceptions to this are Purchasing (BU) and Accounts Payable (AP) addresses.

Address Type	Created By	Maintained By	Allow Others To Change	Use Of Address
PA	Admissions	Admissions Registrar's Office ESL International	NO	Permanent address of applicant or student.
MA	Finance LR/HR Registrar's Office	Finance LR/HR Registrar's Office Extension Services ESL International	Finance LR/HR Registrar's Office	Current mailing address of 'persons' Distance Ed correspondence.
BI	A/R	A/R	NO	Billing address for all non-student customers. Used by Facilities for Room Bookings.
BU	Purchasing	Purchasing	A/P Purchasing	Address for non-student vendors.
AP	A/P	A/P	NO	A/P vendors.
CA	LR/HR	LR/HR	NO	To populate on-line directory and to issue expense cheques.

Standards for Entering Addresses

Wherever possible, given the parameters imposed by the SCT Banner software, this standard is based on the Canada Post, Canadian Addressing Guide. Please see the following URL for details of the guide:

http://www.canadapost.ca/personal/offerings/address_management/pdf/addressing_guide-e.pdf

Data Entry for All Addresses

- All addresses to be delivered in Canada must include:
Addressee Information
Delivery Address
Municipality Province Postal Code
- Use upper and lower-case letter for names and addresses, except for directional which must be upper-case (N, S, W, NE, etc.)
- Use spaces instead of punctuation marks, except as noted below.

Delivery Address Standards

- *Unit or apartment number follows the street type.*
For example: 1000 KLO Rd Apt 305
PO Box 5871 Stn Main

*Or, the unit number can be placed before the civic number with a hyphen separating **but do not use spaces.***

For example: 305-1000 KLO Rd

Enter numerical street names as follows:

1046 1st St
123 42nd Ave (please note both 1st and 42nd are lower case)

Remember that OC Data is exported to other systems which may interpret symbols (eg. &) and punctuation in a different way. Please follow the punctuation guidelines stated here and only use symbols where no alternative exists.

- The Delivery Address Line includes the street address, post office or lock box number. Separate each component of the delivery address with one space.
- Avoid the use of "C/O" and "Attention:"
- Delivery addresses normally are NOT punctuated. Exceptions are essential periods, slashes, and hyphens.
- In the case of box numbers do NOT use other terms such as Lockbox, Bag, Drawer, Mail slot.

Directional

- Always abbreviate directionals, using the standard one or two letter abbreviations. (See Appendix A)
*For example: 34 Outtoland Ave SW
4 Longfellow Ave N Apt 501*
- Exception: Directions that are part of street or city names are NOT abbreviated.
For example: 442 Bay West Dr

Rural Routes

- Do NOT use the words 'rural route', 'number', or the abbreviations no. or # in a rural route delivery address.
For example: RR 6
- For rural addresses, the entry should be from general to specific, with the words Site/Comp OR the initials.
*For example: RR 3 Site 7 Comp 8
RR 3 S7 C8*
- If both civic and rural route addresses exist, the civic address should be on the first line and the rural route on the next line.
*For example: 124 Delaney Dr
RR 2*
- Avoid the use of additional designations such as street names unless it is specifically part of the correct address.
For example: RR2 Valley Rd becomes: RR 2

City, State/Province, Nation, & Postal Code Standards

City Standards

- Spell city names in their entirety.
- If necessary, use the Canadian Postal code book to verify the spelling of city names

This can be accessed on-line at the following URL:

<http://www.canadapost.ca/common/tools/pcl/bin/advanced-e.asp>

Province/State Standards

- Use official two-letter Province/State abbreviations
- Province and State codes **MUST** be entered for all Canadian and United States addresses.
- Within the Banner system, click on the button labeled State/Prov to view and select the valid codes.
- See Appendix A of this document

Nation Standards

- The NATION field **IS REQUIRED** if the country is not Canada.
- Type foreign addresses as given. Use the Nation code to record the country name.
- Within the Banner system, click on the button labeled Nation to view and select the valid codes

Canadian Postal Code Standards

- Postal code must be entered in the ZIP/PC field. ALWAYS enter a postal code.
- Canadian format: enter a space after the first three digits. Do NOT enter a hyphen
For example: V1W 4E8

US Zip Code Standards

- The ZIP code must be separated from the state symbol by 2 spaces and may be five or nine digits. If the nine digit format is used, a hyphen will be used to separate the 5th and 6th digits.

Eg. Washington DC 20019-4649

International Zip Code Standards

- If a postal code is evident and is placed last on a foreign address, put it into the zip code field; otherwise, place it as indicated and leave the postal code field blank.
- For mail addressed outside of Canada and the USA, Canada Post's mechanized equipment reads only the name of the country. Correct spelling is therefore critical and the name of the country must be spelled in full. For example, GB is not acceptable for Great Britain.

TELEPHONE NUMBERS

An entity (person or non-person) may have multiple telephone numbers within the Banner system. Each telephone number is distinguished by a *telephone type*. A student may have a Mailing telephone number (with a telephone code of MA), and may have a Permanent telephone number (with a telephone code of PA).

The following telephone codes are used within the Banner database at the new Okanagan College:

<i>BI</i>	<i>Billing</i>
<i>BU</i>	<i>Business</i>
<i>CA</i>	<i>Campus</i>
<i>CEL</i>	<i>Cellular</i>
<i>FAX</i>	<i>Fax</i>
<i>MA</i>	<i>Mailing</i>
<i>PA</i>	<i>Permanent</i>

Entering Telephone Numbers

Area Codes

- The three digit area code MUST be entered for all phone numbers.

Phone Numbers

- Enter the seven digit number without a hyphen.
For example: 7625445

Extensions

- If an extension number is provided, enter only the digits of the extension. Do NOT enter EXT or X into the extension field.
For example: 7300

Linking Addresses with Telephone Numbers within Banner

Within the Banner database, you have the ability to link the address information to a telephone number.

- The telephone number must be associated with a specific address. The 'Address Type' and 'Seq No' fields are used to link the telephone number to a specific address.
- It is possible to have more than one telephone number for a single address. When 'linking' a telephone number to an address, only one telephone number can display with the address on the form (SPAIDEN).
- The user will enter a "Y" in the 'Prime' indicator field on the Telephone Block of the Banner Telephone Information Form (SPATELE). This identifies the primary number if multiple numbers exist for an address. A telephone number must be flagged as primary before it is displayed with the address information

PERSONAL EDUCATION NUMBERS (PEN)

- A Personal Education Number (PEN) is a province-wide student number which is assigned to a person and then used on all educational records.
- Within the Banner system, there is no designated field to record the PEN. The new Okanagan College is using an existing field "Veteran" on the SPAPERS form.
- If a PEN exists and it is appended with a 'V', it is not to be changed as it has been validated by the Ministry of Education.

RELIGION CODES

- Within the Banner system, the religion code is being used to record department codes to assist payroll with sorting pay statements.

APPENDIX A

CODE LISTS

Common Address Abbreviations

- Use the following abbreviations: (without periods). If you encounter an entry that is not on the list, please consult the Canadian Addressing Standard guide.

Street Directions

N	North	NW	Northwest
S	South	SW	Southwest
E	East	NE	Northeast
W	West	SE	Southeast

Street Types and Unit Designators

Apt	Apartment	Hwy	Highway
Ave	Avenue	Jct	Junction
Bldg	Building	Mtn	Mountain
Blvd	Boulevard	Pk	Park
Ctr	Centre	Pky	Parkway
Crt	Court	Pl	Place
Cres	Crescent	Rd	Road, Roads
Del	Delivery	Sq	Square
Dr	Drive	St	Street
Expy	Expressway	Suite	Suite
Fwy	Freeway	Tr Crt	Trailer Court
GD	General Delivery	Unit	Unit
Hts	Height, Heights		

Codes for Provinces and States

Canada

AB	Alberta	NU	Nunavut
BC	British Columbia	ON	Ontario
MB	Manitoba	PE	Prince Edward Island
NB	New Brunswick	QC	Quebec
NL	Newfoundland	SK	Saskatchewan
NT	Northwest Territories	YT	Yukon Territory
NS	Nova Scotia		

United States

AL	Alabama	GA	Georgia	MA	Massachusetts
AK	Alaska	HI	Hawaii	MI	Michigan
AR	Arkansas	ID	Idaho	MN	Minnesota
AZ	Arizona	IL	Illinois	MS	Mississippi
CA	California	IN	Indiana	MO	Missouri
CO	Colorado	IA	Iowa	MT	Montana
CT	Connecticut	KS	Kansas	NE	Nebraska
DE	Delaware	KY	Kentucky	NV	Nevada
DC	District of Columbia	LA	Louisiana	NH	New Hampshire
FL	Florida	ME	Maine	NJ	New Jersey
		MD	Maryland	NM	New Mexico

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NY	New York	RI	Rhode Island	VA	Virginia
NC	North Carolina	SC	South Carolina	WA	Washington
ND	North Dakota	SD	South Dakota	WV	West Virginia
OH	Ohio	TN	Tennessee	WI	Wisconsin
OK	Oklahoma	TX	Texas	WY	Wyoming
OR	Oregon	UT	Utah		
PA	Pennsylvania	VT	Vermont		

Gender

<i>CODE</i>	<i>DESCRIPTION</i>
M	Male
F	Female
N	Not Available