

## General Person Module – Frequently Asked Questions

### General Questions:

#### When will the Banner e-learning tool be available?

- The project web site will be up on February 14<sup>th</sup>.
- Navigation Training and General Person training will be on this site at that time as well as these FAQs and the one page Job Aid.
- The link is: <http://humber.ca/esp/> . You will need to go into the Documentation and Training link and then Banner INB.

#### What version of Firefox do employees need to run Banner, and do we need upgrading?

- For Banner you can use Firefox, Chrome, Safari or IE.
- For LIS you still need to be on Firefox.
- It is best to have the most recent version of Internet Explorer (IE 8.0 or higher) and Firefox 17.0 or higher.

#### If I get a call or an email from a student who cannot login to SRS through Cassification, what do I do?

- Students or staff should be directed to x8888- IT Services for log-in issues.

#### If I have a question regarding how to use the General Person Module in Banner, what do I do?

- Escalate any issues to your Lead or Manager who will escalate to the project team.

#### Is Banner similar to other ERP solutions such as SAP?

- SAP does have ERP solutions, but it is more for Business Intelligence. Banner is a Higher Education Student Information System.

### Account Questions:

#### With the new N number that is generated in Banner, what number will appear on the Admit to Class form, Admissions letters, timetables, transcripts, the Confirmation of Enrolment (COE), Confirmation of Graduation (COG) and for CE students?

- The Admit to Class form already has the new Humber Username as well as the Humber Student Number and has had this information since November 2012.
- Currently, usernames are four letters and numbers (example: bcdf1234) or part of one's name (example: smithz). Going forward, all new usernames will all take a numeric form (example: N12345678). Existing usernames will remain valid and login screens will be adjusted. A Humber

Student number (example: 825-243-819) will still be issued to students to support legacy systems (EIS/LIS/ SRS).

### **Why do I need to enter 'IS' in the Additional Identification tab?**

- Until all Banner modules have been implemented, the IS (Interim Student) tag allows the newly created record to go to LIS and then to EIS.

### **Are all new records created in General Person defined as students?**

- No, not all General Person records are students. IT Services will be creating accounts for guests of the college i.e. conferences attendees. These records do not require the Interim Student (IS) tag.
- HR will create new records for Faculty and Staff and this information will be populated in Banner General Person.

### **If a new employee requires parking but they are not in Banner or LIS yet, what should I do?**

- HR is responsible for creating new records for Faculty and Staff.
- The employee would need to follow up with their hiring manager to ensure their contract is set up with HR.
- The Office of the Registrar is no longer responsible for creating new employee records.

### **Now that HR will be setting up new employee records; will the Banner record include full-time employees/partial load faculty info so customer service staff can determine their eligibility to purchase CE courses at a reduced rate? What should our communication be to full-time employees/faculty that comes to CS and the info is not available in Banner?**

- Customer Service will still receive the list of Employees from HR and be able to determine if they are eligible for courses at a reduced rate.
- Customer Service will not be able to determine an employee's eligibility in Banner.

### **If Banner only creates new records, why are there records in Banner already?**

- There are already records in Banner because any Person/Faculty/Student/Applicant that has been active in the last 5 years or has had at least one graded activity has been converted to Banner.
- This represents approximately 2/3 of the person records currently residing in LIS/EIS. The other 1/3 will be marked as "archived".
- The archived records are not being converted to Banner, we should no longer make updates to demographic information in EIS/LIS. If the person shows up again after 5 years, a new demographic record will need to be created in Banner.

### **What is “Clean Address” and is it only for Canadian Addresses?**

- “Clean Address” is a software add-on to Banner that compares user- entered address information against Canada Post content.
- Currently we only have this product configured for Canada Post content. In the future we may add to this for US Post and International Addresses.

### **What do we use if we don’t have an email address to enter in the “Email Type” field?**

- If you weren’t provided with an email address, please enter [Unknown@humber.ca](mailto:Unknown@humber.ca)
- However, this will mean that the person will not receive their Humber Username and password credentials to log in to Humber services. Employees will need to provide students with their Humber ID number (N number/HCnet ID) and their Humber Number (8xx xxx xxx).

### **If I am making a change to an address, should I create a new Address record or just overwrite the existing address?**

- If it is a small correction (i.e. missed a letter or Unit #) then you can overwrite the existing address. If it is clearly a brand new address, you must first inactivate the current address by checking the “Inactivate Address” field and entering a date in the “To Date” field. We have the capacity to store many inactive addresses while storing a record of address changes.
- We only keep one current “PR” (Permanent Address) in Banner as we do in LIS/EIS.

### **Why couldn’t I see or update the Gender or Date of Birth during training?**

- During training, there were some rules that masked the gender and date of birth fields in the Test environment
- You can update these fields when you have access to them after the Go-Live date of February 19<sup>th</sup>.
- These fields are in the SPAIDEN tab called, “Biographical”.

### **Should we update changes through SSB (Self-Service Banner) or INB (Internet Native Banner) and why?**

- No, you should only be using INB to update General Person changes.
- When you log into SSB you will not be able to see a student’s account.
- INB is similar to EIS and is for the functions of the Office of the Registrar.

**If a student is set up as a female, when searching for her name, will the search limit the names to female only? Is gender a criterion for the search engine?**

- The GOAMTCH rule is set up to look at the first 10 characters of the last name and the first 5 characters of the first name, date of birth and city with Street Line 1.
- Gender is not a criterion for the search engine.

**Why do I need to update fields in LIS after completing a new person/student record in Banner?**

- We need to update the fields in LIS to set the fee type as we have not yet implemented the fees module in Banner.

**Do Reg Office employees see an audit log of who did what and when as this may be required when following up with students?**

- On all Banner forms and tabs you can see a history of changes including usernames.

**How long will it take for CE students to have access to SRS once their student record has been created? Currently it is taking hours and often days.**

- The record goes to LIS very quickly for all students.

There was a problem a couple of weeks ago that resulted in the delay of new accounts being created immediately – this was not a Banner issue.

**Customization Questions:**

**Can the auto hint line at the bottom of the screen be highlighted or more pronounced?**

- Unfortunately, this would be a customization to Banner which would require some additional development.

**Can we have bold text to help us determine mandatory fields?**

- Unfortunately, this would be a customization to Banner which would require some additional development. The fields that are mandatory to enter are in the one-pager Job Aid provided and is available on the project website

**If I set up "My Favorites" in Banner, will this be accessible to other people using my computer? Some CS staff frequently use different computers. Will their access ID save their preferences no matter what computer they log into?**

- You log in to Banner with your user ID and password. If you have set up MY BANNER, it will be there each time you log in regardless of what computer you're using.

**On "My Preferences" can staff re-name the forms (change SPAIDEN to NEWSTU?)**

- No, we can't change form names. This is a customization that requires a lot of development and approval.

**Can the names of forms be user friendly (change SPAIDEN to NEWSTU?)**

- No, we can't change form names. This is a customization that requires a lot of development and approval.

**Search Questions:**

**Are the fields in GUISRCH case sensitive?**

- All the fields in GUISRCH require numbers except the E-mail address field. The E-mail address field is not case sensitive.

**Will the system search on married or maiden names to prevent duplication?**

- Unfortunately, there is no way to program this. However, the system does recognize similar names such as Bob/Robert.

**If a student provides us with their SIN number, will we be able to find the student in GUISRCH?**

- No, GUISRCH does not have any search ability using the SIN.

**Is it best to go to GOAMTCH first rather than SPAIDEN?**

- GOAMTCH is a form off of SPAIDEN - Either way will get you to search.
- The GOAMTCH rule is set up to look at the first 10 characters of the last name and the first 5 characters of the first name, date of birth and city with Street Line 1.

**Since LIS does not require a phone number to be entered, will this increase duplication of student records since it cannot be used for matching criteria?**

- Banner will now be the system of record for Biographical and Demographical information. The Duplicate Check process is now run in Banner and requires a phone number to be included for all records.
- However, the phone number is not one of the rules for GOAMTCH

**Can students still update their SIN through SRS even though SIN is on one of tabs from the SPAIDEN form in Banner?**

- Students will still have the ability to go to SRS to change/update their SIN.
- We are not collecting SINS in the General Person module. Financial Aid staff has the ability to update and view SINS in the Banner Student Aid Module.