Banner Human Resources
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Information Non-disclosure at NMSU

New Mexico State University maintains the confidentiality and security of records in compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA), the Health Insurance Portability and Accountability Act (HIPAA), and the Gramm-Leach-Bliley Act (GLBA), in addition to other federal and state laws. These laws pertain to the security and privacy of personal academic, medical and financial information, along with identifying information such as social security numbers.

**Family Educational Rights and Privacy Act of 1974 (FERPA) Policy:**
[http://research.nmsu.edu/compliance/IRB/resources.html#3](http://research.nmsu.edu/compliance/IRB/resources.html#3)
FERPA protects students’ records. FERPA requires post-secondary educational institutions and agencies to conform to fair information practices in their handling of student data. Among the provisions of the act are the requirements that data be used only for intended purposes and that those responsible for student data take reasonable precautions to prevent misuse of it. Examples include Social Security Numbers, grades, date of birth, etc.

**Health Information and Portability Accountability Act (HIPAA):**
[http://research.nmsu.edu/compliance/IRB/resources.html#7](http://research.nmsu.edu/compliance/IRB/resources.html#7)
HIPPA protects all medical records and other individually identifiable health information used or disclosed in any form, whether electronically, on paper, or orally.

**Gramm-Leach-Bliley (GLB) Act:**
GLBA protects private, non-public information of individuals. Private, non-public information consists of information such as name, Social Security Number, date and location of birth, gender, credit card numbers and driver’s license numbers.

Within NMSU, employees are authorized access to University records only to the extent necessary to perform their official university duties, and are responsible for protecting such information against unauthorized access or disclosure.

The New Mexico State University Policy Manual, **Chapter 2** General Operating Policies, Section 2.90 contains specific information related to disclosure of records and information.

Examples in this manual may have personal data altered or blacked out to ensure privacy.
Account Structure

**What is FOAPAL?**

FOAPAL is the acronym for the account number within the Banner system. Each letter represents a piece of the account number: Fund, Organization, Account, Program, Activity, and Location. **FOAPAL** is the key used for entering financial transactions.

<table>
<thead>
<tr>
<th>Required Segments</th>
<th>Optional Segments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chart C</td>
<td></td>
</tr>
<tr>
<td>Fund F</td>
<td></td>
</tr>
<tr>
<td>Organization O</td>
<td></td>
</tr>
<tr>
<td>Account A</td>
<td></td>
</tr>
<tr>
<td>Program P</td>
<td></td>
</tr>
<tr>
<td>Activity A</td>
<td></td>
</tr>
<tr>
<td>Location L</td>
<td></td>
</tr>
</tbody>
</table>

**The shortcut...**

To process accounting transactions, departments will need to use an Index Code and an Account Code.

**Index**

The charge center where the payroll expenditures related to the employee will be posted for each pay period. Entry of the index will automatically populate the corresponding Fund, Organization, Program, and in some cases Activity and/or Location.

**Account Code**

Type of expenditure transactions. For payroll related transactions, these values are automatically generated from the Banner Human Resources System.

**Example**

The Index number **100839** was entered. This is what is displayed:

<table>
<thead>
<tr>
<th>COA</th>
<th>Index</th>
<th>Fund</th>
<th>Organ</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>100839</td>
<td>111000</td>
<td>530940</td>
<td>1330</td>
<td>1330</td>
<td>1330</td>
<td>1330</td>
<td>1330</td>
</tr>
</tbody>
</table>
Logging on to Banner

Banner supports authenticated user access, meaning that the system verifies your credentials and you are given access to the system based on your assigned security. To use Banner as an authenticated user, you must successfully log on by providing your credentials: NMSU Username, and Banner Password.

Banner can be accessed from any Internet browser such as Internet Explorer, Netscape, or Mozilla Firefox.

1. Type http://www.nmsu.edu/~boffice/ in the address bar of your web browser and press Enter.


2. Click on the Banner Native Login link.

Team Tip: You can create a bookmark in your browser for quick access to Banner.
The **Logon** screen will be displayed.

3. Enter **Username** and **Password**.
4. **Database** field remains blank.
5. Click on the **Connect** button.

The **General Menu** form, **GUAGMNU**, will be displayed.
Employee Information Forms

Identification (PPAIDEN)

Current Identification

When a person is new to the university the **PPAIDEN** form is completed. This form stores biographic, demographic and address information. The information is fed to all appropriate forms that identify the individual as a person.

1. Access the **Identification** form, **PPAIDEN**, either by double clicking on the form name on the **General Menu** or by entering **PPAIDEN** in the **Go To...** field on the **General Menu**.

**Team Tip:**
Keep in mind that there are different ways to navigate through the forms which is covered in the Banner Navigation User Manual. You will find a style that is comfortable for you as you become more familiar with Banner.
The **Identification** form will be displayed.

2. Click on the **Search** button next to the **ID** field.

The **Option List** window will be displayed.

3. Click on **Person Search (SOAIDEN)**. 
The **Person Search** form, **SOAIDEN**, will be displayed.

1. Enter the person’s last name in the **Last Name** field.
   a. Wild cards (%) can be used in place of letters in the search. Refer to the Banner Navigation manual or tutorial for additional information regarding searching with wild cards.
   b. Searches may be case sensitive or insensitive depending on your selection. The default is case insensitive.

2. Press the **F8** key on the keyboard or click on the **Execute Query** button to retrieve a list of names.
3. Double click in the ID field of the record you wish to access or highlight it and click on the Select button.
The **Identification** form will be displayed showing the person’s **ID** and **Name** in the **Key Block** area.

1. Click on the **Next Block** button.

**Team Tip:**

Additional blocks may be accessed directly through the **Options** menu, by clicking on the **Next Block** button, or by clicking on the page tab.
Identification information for this person will be displayed.

The Identification PPAIDEN form has the following information.

1. **Current Identification:**
   - **ID:** System-generated ID number
   - **SSN/SIN/TFIN:** Social Security number

2. **Person Name Information:**
   - **Last Name**
   - **First Name**
   - **Preferred First Name**

The Identification PPAIDEN form contains multiple tabs of information.

- Current identification (described above)
- Alternate Identification
- Address (refer to page 14); also available on form PPIADDR
- Telephone; also available on form PPATELE
- Biographical (refer to page 16)
- Email; also available on form GOAEMAL
- Emergency Contacts
- Additional Identification (not used)
1. Access the **Address Information** block by clicking on the **Address** tab, from the **Options** menu, or by clicking on the **Next Block** button until it is displayed.
The **Address Information** block will be displayed.

2. Use the scroll bar to view additional addresses (i.e. work address) for this person.

**Team Tip:**

Address information can also be accessed directly on form PPIADDR.
1. Access the Biographical information block by clicking on the Biographical tab, from the Options menu, or by clicking on the Next Block button until Biographical information is displayed.
The Biographical block will be displayed.

2. Use the page tabs, the Options menu, or the Next Block button to access additional information as needed.
3. Click on the Exit button on the Navigation Toolbar to return to the General Menu form, GUAGMNU.
Employee (PEAEMPL)
General Employee Information

The Employee form, PEAEMPL, stores general employee information including the employee's current status dates, leave and benefit categories, and home department information.

Access the Employee form, PEAEMPL, either by double clicking on the form name from the General Menu or by typing PEAEMPL in the Go To... field.

The Employee form, PEAEMPL, will be displayed.

1. Enter the ID of the person whose information you need to access, or use the Search button or ID and Name Extended Search.
2. Click on the Next Block button.
Employee information for the person will be displayed.

The **General Employee** form has the following information:

1. **General Employee Information**:
   - Employee Status
   - FT/PT Status

2. **COA**:
   - Home Department Org
   - Check Distribution Org

3. **Service Dates**:
   - **Current Hire**: Begin date of current primary job. This date changes with every new primary job.
   - **Original Hire**: First date of employment at NMSU regardless of employee type. This date does not change and will always remain the same regardless of changes in employee status or breaks in service.
   - **Adjusted Service**: Date of regular consecutive employment. This date is used to track years of regular consecutive service where there has been no break in service. Upon break of service and return to regular employment date must be changed to reflect the new service date.
   - **Seniority Date**: Date of continuous service within a job classification. Currently this date is used only to track and report seniority dates for non-exempt bargaining unit employees.
   - **Termination Date**: Effective termination date of employment with NMSU. This date must be the same as the last NBAJOBS Effective End Date.
   - **First Work Date**: not currently used.
   - **Last Work Date**: not currently used.
Employee Jobs (NBAJOBS)

The Employee Jobs form, NBAJOBS, displays information about a specific job that an employee holds or has held.

1. Enter the ID or perform a search for the person whose information you wish to view.
2. Enter the Position number and Suffix or perform a search for the position of the person whose information you wish to view. Clicking the Search button to search for the person’s position will open form NBJLST (see page 26).

Team Tip:
The Query Date defaults to the current date and will display information that is Current to the date. In order to have the system display any changes to the position, change the Query Date to January 1, 2004.
Job Detail Information Tab

1. Click the **Next Block** button. **General Job** information about the job you selected for this employee will be displayed.

2. Click on the page tabs, the **Options** menu, or the **Next Block** button to view additional information.

The **Job Detail** block will be displayed. The **Job Detail** block has the following information:

- **Effective Date**: Date used for payroll purposes and is the date for which the position will be included for the pay period payroll. This date cannot be before the Last Paid Date when making job changes for that position.
- **Personnel Date**: Date of the job action. This is the actual date of the job transaction and does not need to match the effective date. Retro-active dating is allowed.
• **Status:** reflects employee’s current job status
  - Active: Job is currently active.
  - Leave w/o Pay, w/Ben: employee status is “Leave without Pay”. Employee is not working and will not be paid. Employee does not have annual or sick leave to cover leave of absence period. Benefits are still applied.
  - Leave w/o Pay, w/o Ben: employee status is “Leave without Pay”. Employee is not working and will not be paid. Employee does not have annual or sick leave to cover leave of absence period. Benefits are not applied.
  - Leave w/Pay, w/Ben: Employee status is 'Leave with Pay’. Faculty member is on 1/2 year Sabbatical receiving 100% pay or Staff member with sufficient annual or sick leave balance to cover leave of absence period.
  - Leave w/Part Pay, w/Ben: Employee status is 'Leave with Partial Pay’. Faculty member is on Full-year Sabbatical receiving 60% pay.
  - Terminated: Job has been terminated.

• **Job FTE:** Reflects fulltime equivalency. An entry of .50 = 50% FTE

• **Appointment Percent:** Based on Job FTE

• **Employee Class:** refer to Appendix B

• **Grade:** Needed for Personnel Action Form (PAF)
  - **Rate:** Reflects hourly amount
  - **Assign Salary:** If salaried, reflects amount per pay period
  - **Factor:** Number of pay checks an employee will receive per year
  - **Pays:** Number of pay periods within a year
Additional Effective Dates

1. Details from previous effective dates can be viewed by selecting the **Options Menu**, View Job Detail Effective Dates.

![Banner HR Options Menu](image1)

2. Select a date to view. NBAJOBS will be populated with the updated information from your selection.

![Banner HR Select Effective Date to Query](image2)
**Miscellaneous Job Information**

The **Miscellaneous** job information block can only be accessed while the **Job Detail** information block is displayed.

Use the page tab, the **Options** menu, or the **Next Block** button 🔄 to access the **Miscellaneous** block.

1. For positions filled on or after January 3, 2005, the **Contract Number** field contains the last eight digits of the E-Hire requisition number or the EPAF (Electronic Personnel Action Form) transaction number.
   - For a requisition number of 2007012603, the **Contract Number** field will display 07012603.
   - For regular student hires, a requisition number of SES792-2 will be displayed in the **Contract Number** field as S2792-2.
Payroll Default Tab

Use the page tab, the **Options** menu, or the **Next Block** button to access the **Payroll Default** block.

1. The **Timesheet Organization** can be found on the **Payroll Default** block.
Job Labor Distribution

Use the page tab, the **Options** menu, or the **Next Block** button to access the **Job Labor Distribution** block.

1. Labor distribution fields are automatically populated based on the position number displayed in the **Position** field.
   a. To view previous job labor distributions, select **View Labor Distributions Effective Dates** from the **Options** Menu.
2. Click on the **Exit** button to return to the **General Menu**.

**Team Tip:**

If the Labor Distribution is not correct or needs to be changed, you must submit a Labor Redistribution Form to Payroll.
Employee Job Inquiry (NBJ LST)

The Employee Job Inquiry form, NBJ LST, displays all the jobs that an employee has held with the university, including their current one(s).

Access the Employee Job Inquiry form, NBJ LST, by double clicking on the form name on the General Menu, by typing NBJ LST in the Go To... field, or by using the position search feature on the NBAJOBS form.

The Employee Job Inquiry form, NBJ LST, will be displayed.

If you are accessing this form from NBAJOBS, the person’s job information will already be populated. If you are accessing this form from the General Menu:

1. Enter the ID or perform a search for the person whose information you wish to view.
2. Check the Query Date; using a date of January 1, 2004 is recommended.
3. Click on the Next Block button.

Team Tip: Refer to the PPAIDEN section of this manual for information on search options.
Information about the employee's jobs will be displayed.

4. Click in the **Position** field for the position you wish to find information on.
5. Information about the position will be displayed in the job block.
6. If you accessed this form from **NBAJOBS**, click on the **Select** button or double click the position number to select the highlighted position which returns you to the **NBAJOBS** form.
7. Click on the **Exit** button to return to the **General Menu**.
Employee Leave Balances (PEALEAV)

The Employee Leave Balances form, PEALEAV, displays an employee’s annual and sick leave balances. It can be accessed from the Employee PEAEMPL form from the Options menu or by entering PEALEAV in the Go To... field on the General Menu.

The Employee Leave Balances form, PEALEAV, will be displayed.

1. Enter the ID or perform a search for the person whose information you wish to see.
2. Click on the Next Block button to display leave balances.
3. Click on the Exit button to return to the calling form or the General Menu.

Team Tip:

Employee balances may not be current due to timing of leave reporting.
General Information (PPAGENL)

General Education Information

The General Information form, PPAGENL, has information about an employee's educational background.

Access the General Information form either by double clicking on the form name on the General Menu or by typing PPAGENL in the Go To... field.

1. Enter the ID or perform a search for the person whose information you wish to view.
2. Click on the Next Block button.

Team Tip:

Refer to the PPAIDEN section of this manual for information on search options.
Information about the employee's educational background will be displayed.

The **General Information PPAGENL** form contains the following information. Use the scroll bars on the right to see additional records.

3. **Institution Information:**
   - Institution name

4. **Diploma/Degree Information:**
   - Degree
   - Level
   - Graduation Date
   - Terminal Degree indicator

5. **Major, Minor, and Area of Concentration** information

6. Use the scroll bars to the right of each block to view additional **Institution,** **Diploma/Degree,** **Major,** **Minor,** and **Area of Concentration** information for this person.

Additional tabs on the **PPAGENL** form are not currently in use with the exception of the **Transcript** block. The **Transcript** block shows the date an official transcript was received (if required).
Faculty Information Forms

Employee List by Faculty Action (PEIELFA)

The Employee List by Faculty Action form, PEIELFA, enables you to query faculty members due for a tenure, promotion, reappointment, or sabbatical leave decision based on faculty action and query date.

1. Select the type of faculty action you wish to review by clicking on the appropriate radio button.
2. You can narrow your search (display fewer records) by filling in other fields in the Key Block area.
3. Click on the Next Block button.
4. The General Faculty Information block contains the following information for each faculty member who matches your Key Block criteria:
   - ID
   - Name
   - Organization
   - Position
   - Date fields and other information will depend on Action Type selected in the Key Block area. Use the horizontal and vertical scroll bars to view all data.
5. The Detail icon opens the Faculty Action Tracking, PEAFACT form to display detailed information about the highlighted faculty member.
Payroll & Budget Information Forms

Labor Distribution Data Inquiry (ZHIDIST)

The Labor Distribution Data Inquiry form, ZHIDIST, provides query access to all payroll distribution data.

Access the Labor Distribution Data Inquiry Form form, ZHIDIST, either by double clicking on the form name on the General Menu or by typing ZHIDIST in the Go To... field.

1. Enter an Index.
2. Enter a From Date: and To Date: in the Key Block area.
3. Click on the Next Block button.
4. Click on the Execute Query button.
5. This form displays earnings and benefit data for each individual for the Chart of Accounts, index, date range, and category specified in the Key Block area.

Team Tip:

You can enter additional search criteria in the first row of the information section of the form and execute a query to display only specific records.
Information from the **Labor Distribution Data Inquiry** form can be downloaded to a spreadsheet for further analysis.

6. On the **Help** menu, select **Extract Data no Key**.

**Team Tip:**

If the **Extract Data No Key** does not open, hold down the Ctrl key while you click on Options, Extract Data No Key. This temporarily overrides your Browser settings and allows it to open.
A browser window will open with your query results displayed in it.

7. You can copy the spreadsheet and paste into any spreadsheet program that reads HTML (for example, Excel). You can then re-format the data as desired to produce a report.

8. Click on the spreadsheet browser's Exit button to close the spreadsheet window and return to the Labor Distribution Data Inquiry form.

9. Click on the Exit button on the Navigation Toolbar to return to the General Menu.
Labor Distribution Change History (NBIJ LHS)

The **Labor Distribution Change History** form, **NBIJ LHS**, displays the labor distribution history for a specified employee and assignment.

Access the **Labor Distribution Change History** form either by double clicking on the form name on the **General Menu** or by entering **NBIJ LHS** in the **Go To...** field.

1. Enter the **ID** or perform a search for the employee whose information you wish to view.
2. Enter the **Position** number or perform a search for the position for this employee which you wish to view.
3. Click on the **Next Block** button.
4. The **Job Labor Distribution Change Information** block has the following information for each change for an individual:
   - **Effective Date**
   - **Change Reason**
5. The **Job Labor Distribution Detail Information** block has the following information for each change for an individual:
   - **Salary FOAPAL** information
   - **Fringe FOAPAL** information
6. The **Encumbrance To Post & Salary Transaction Detail** tabs are not currently used.
Employee Year To Date Totals (PEIETOT)

The Employee Year To Date Totals form, PEIETOT, provides monthly, quarterly, and year-to-date employee totals by designated fiscal/calendar year.

1. Enter the ID or perform a search for the person whose information you wish to view.
2. Enter a Year.
3. You may select Calendar or Fiscal year by clicking on the appropriate radio button.
4. Click on the Next Block button.
5. This form contains the following information for the employee for each month:
   - Hours worked
   - Gross amount
   - Net amount

Team Tip:

Totals are based on the month payment is issued. Non-exempt paid on a pay period lag would post amounts paid in the month payment is received. For example, payment made on 2/15 would post to February even though the payment is for January work.
**Job Year To Date Totals (PEIJTOT)**

The **Job Year To Date Totals** form, **PEIJTOT**, provides monthly, quarterly, and year-to-date job totals by either fiscal or calendar year.

1. Enter the **ID** or perform a search for the person whose information you wish to view.
2. You can narrow your search (display fewer records) by filling in other fields in the **Key Block** area.
3. Click on the **Next Block** button.
4. This form contains the following information for the requested earnings code and all earnings in a specific assignment entered in the **Key Block** area:
   - Hours
   - Gross amounts
   - Yearly totals
Employee Salary History Inquiry (PEISALH)

The Employee Salary History Inquiry form, PEISALH, lists the primary, secondary, and overload positions occupied by a specified employee.

1. Enter the ID or perform a search for the person whose information you wish to view.
2. Click on the Next Block button.
3. Related job information from the Employee Jobs form, NBAJOBS, defaults here for each position. Use the vertical and horizontal scroll bars to display all data.
Human Resources System Additional Forms

Position Incumbent List (NBIPINC)

The Position Incumbent List form, NBIPINC, lists position incumbents by fiscal year as of a user-specified date. It provides data on past and present incumbents for the position, future incumbents by the effective job date, and total occupied FTEs for each position.

1. Enter the Position Number or search for the position for which you wish to view information.
2. Use the current date in the Query Date field to get full history.
3. Click on the Next Block button.
4. This form contains the following information for each incumbent:
   - ID
   - Name
   - Status
   - Job Begin/End Dates

FTE Total: 1.60
Position List By Organization (NBIPORG)

The **Position List By Organization** form, **NBIPORG**, provides a list of positions defined for a specified organization. Positions appear in sequence according to defined **Position Number**.

1. Enter the Organization Number in the **Organization** field or search for the organization whose list you wish to view.
2. Click on the **Next Block** button.
3. This form contains the following information for each position within an organization:
   - **Position number**
   - **Title**
   - **Status**
   - **Begin/End Dates**
   - **FTE totals**
**Banner HR Self-Service**

Personal information, such as addresses and phone numbers, emergency contacts, and marital status, can be changed using Banner HR Self-Service.

Self-Service is accessed through MyNMSU.

1. Once logged into MyNMSU, click on the **Employee** link.
Employee Link

The Employee tab contains links for entering your time and leave and checking leave balances. For additional information regarding Time & Leave, refer to the Time & Leave Manual on http://hr.nmsu.edu/clpd/busprocdocs.html.

Additional options on the Employee menu include the ability to view your current Benefits and Deductions and Pay Information (direct deposit allocations, earnings history and pay stubs). Copies of W4’s and W2’s can be obtained under the Tax Forms folder.

2. Click on Personal Information to see all options (this will open a new window).
Update Addresses and Phone Numbers

1. Click on **Addresses and Phones** on the Personal Information menu.

2. Select an address to update or

3. Insert a new address
4. Update/enter the appropriate information in the address section

5. Update/enter your phone numbers at the bottom of the page.
6. Check the **unlisted** box if you do not want your home phone number listed in the NMSU phonebook. You will also need to unlist your home phone number and address with ICT (see below).
7. Click **Submit**.
Setting ICT Privacy Preferences

1. Log in to https://accounts.nmsu.edu/accounts/privacy/index.php using your NMSU username and password.
2. Select the **Hide** radio buttons to hide personal information.

3. Click the **Submit** button. The message box below will appear above the Submit button.

4. Click the **Logout** button.
Update Emergency Contacts

1. Click on **Update Emergency Contacts** on the Personal Information menu.

2. Update a contact's information by clicking on their name or
3. Select New Contact to add another contact.
4. Complete the contact information page
5. Click Submit Changes
1. The **Personal Information** tab contains information on how to officially **change your name** and/or **social security number** with NMSU and the Federal Government.
Help

If you need HELP with Banner HR, Web-Time and Leave Entry, or Self Service:

- **Call the ICT HelpDesk at 646-HELP (4357)**

- **E-mail help_admin@nmsu.edu**

- **For online help, documentation and interactive online training demos, go to:**
  
  [http://hr.nmsu.edu/clpd/busprocdocs.html](http://hr.nmsu.edu/clpd/busprocdocs.html)
Glossary

The following information describes standard terms used within the Banner System.

Alert Box
A type of dialog box that pops up to notify you of a condition that may affect how you can enter information or the kind of information you can enter. It requires you to acknowledge the message before you can continue.

Application form
Form used to enter, update, or query information. (An application form will have the letter “A” in the third position of the form name.)

Block
An information area on a form separated by a solid line.

Calling form
Form from which you accessed another form.

Cancel
Exits you from an Option List, List of Values, Editor window, or Dynamic Help.

Clear form
Clears all information and returns you to the first enterable field in the key information area.

Commit
Saves all changes entered since the last time you saved.

Count Hits
In query mode, counts the number of records that meet the search criteria and displays that number in the Auto Help Line.

Count Query Hits
In query mode, counts the number of records that meet the search criteria and displays that number in the Auto Help Line. To retrieved records, select the Execute Query Function.

Dialog Box
A box containing information. Requires you to respond to it before you can continue.

Down
Use the key. Moves the cursor to the first enterable field in the next record, moves you lower on a List of Values, and moves you lower in a pull-down list.

Drop-down List
Shows three or more values for a field. Any field with a down arrow icon contains a drop-down list.
**Edit**
Displays a window you can use to add, change, or delete text; especially useful in entering and updating Dynamic Help.

**Enter Query**
Puts the form into query mode and lets you enter search criteria to see what information is already in the database. ENTER QUERY appears in the Status Line.

**Execute Query**
In query mode, searches the database and displays data that matched the search criteria.

**Exit**
From forms and windows, exits you from the form or window. From menus, exits you from the Banner system. From query mode, cancels the query and takes the form out of query mode.

**Exit with Value**
From a called form, returns you to the calling form and enters the highlighted value into the field that called the form. From a List of Values (LOV), returns you to the calling form and enters the highlighted value into the field that called the form.

**Exit without Value**
From forms and windows, exits you from the form or window. From menus, exits you from the Banner system. From query mode, cancels the query and takes the form out of query mode.

**Field**
Area in a form where you can enter query, change information, or where existing information is displayed. Banner describes fields as: enabled, disabled, enterable, or display only.

**Form**
Screen allowing the display/update of information.

**Help**
Displays the Oracle help window for the current field.

**Inquiry Form**
Form used to look up existing information on the database. Allows you to view but not update (An inquiry form will have the letter “I” in the third position of the form name.)

**List of Values (LOV)**
Window containing valid items available for entry into a field. Displays a list of values for the current field if appears in the status line.

**Menu**
A list of options you can access with the mouse or keyboard.

**More**
The More indicator appears in the lower right corner of each window of a series of related forms (even the last form). It tells you that there are additional forms that can be accessed to complete a process.
**Next Block**
To move the cursor to the next information area (block) that has at least one enterable field.

**Next Field**
The next enterable field in the current information area.

**Next Item**
The next enterable field in the current information area.

**Next Primary Key**
From a called form, returns you to the calling form and enters the highlighted value into the field that called the form. From a List of Values (LOV), returns you to the calling form and enters the highlighted value into the field that called the form.

**Next Record**
To move the cursor to the first enterable field in the next record of the current information area. If the cursor is in the last record, a new record is created.

**Object**
An object can be a form, job, menu or QuickFlow used in Banner.

**Option List**
Dialog box displaying two or more items to choose from.

**Pop-Up Window**
Dialog box, alert box, or list of values that appear in a separate window.

**Previous Block**
The previous information area that has at least one enterable field. If the previous area is another window, then that window is opened.

**Previous Field**
To move the cursor to the previous enterable field in the current information area.

**Previous Item**
To move the cursor to the previous enterable field in the current information area.

**Previous Record**
To move the cursor to the first enterable field in the previous record.

**Query Form**
Form used to look up existing information on the database. (A query form has the letter “Q” in the third position of the form name.)

**Quick Flow**
A set of forms that are linked together in order to help you complete a process within Banner. When you use Quick Flow, it opens the first form in the set and the next form is automatically opened until the process is complete.

**Record**
All information displayed in the window for an item.
**Rollback**
From an application or inquiry form, clears all information and returns you to the key block area. Rollback is a standard button and appears on forms. From validation forms, rollback will return you to the first enterable field on the calling form.

**Save**
To permanently record changes to the database.

**Scroll Down**
The process of moving down repeating records or lists of information that cannot all be displayed in one window.

**Select**
Choose an item by highlighting it or clicking it with mouse.

**Show Keys**
Display the list of keyboard options.

**Up**
Use the key. To move the cursor the first enterable field in the previous record moves you upward on a List of Values or drop-down list.

**Validation Form**
Form used to define the values that can be entered in specified fields on application forms. (A validation form will have the letter “V” in the third position of the form name.

**Window**
An information area being displayed.
Appendix A: Form Name Structure

Position 1 identifies the primary system owning the form, report, job, or table.

<table>
<thead>
<tr>
<th>Position</th>
<th>Description</th>
<th>Position</th>
<th>Description</th>
<th>Position</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Alumni/Development</td>
<td>L</td>
<td>Occupational Tax/License</td>
<td>U</td>
<td>Utilities</td>
</tr>
<tr>
<td>B</td>
<td>Property Tax</td>
<td>N</td>
<td>Position Control</td>
<td>V</td>
<td>Voice Response</td>
</tr>
<tr>
<td>C</td>
<td>Courts</td>
<td>O</td>
<td>Customer Contact</td>
<td>X</td>
<td>Records Indexing</td>
</tr>
<tr>
<td>D</td>
<td>Cash Drawer</td>
<td>P</td>
<td>HR/Payroll/Personnel</td>
<td>W</td>
<td>Reserved for client</td>
</tr>
<tr>
<td>F</td>
<td>Finance</td>
<td>Q</td>
<td>Electronic Work Queue</td>
<td>Y</td>
<td>applications that</td>
</tr>
<tr>
<td>G</td>
<td>General</td>
<td>R</td>
<td>Financial Aid</td>
<td>Z</td>
<td>co-exist with Banner2000</td>
</tr>
<tr>
<td>I</td>
<td>Information Access</td>
<td>S</td>
<td>Student</td>
<td></td>
<td></td>
</tr>
<tr>
<td>K</td>
<td>Work Management</td>
<td>T</td>
<td>Accounts Receivable</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Position 2 identifies the module owning the form, report, job, or table.

<table>
<thead>
<tr>
<th>General (G)</th>
<th>Student (S)</th>
<th>Finance (F)</th>
</tr>
</thead>
<tbody>
<tr>
<td>E</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>J</td>
<td>C</td>
<td>B</td>
</tr>
<tr>
<td>L</td>
<td>E</td>
<td>C</td>
</tr>
<tr>
<td>O</td>
<td>F</td>
<td>E</td>
</tr>
<tr>
<td>P</td>
<td>G</td>
<td>F</td>
</tr>
<tr>
<td>S</td>
<td>H</td>
<td>G</td>
</tr>
<tr>
<td>T</td>
<td>I</td>
<td>I</td>
</tr>
<tr>
<td>U</td>
<td>K</td>
<td>O</td>
</tr>
<tr>
<td>X</td>
<td>L</td>
<td>P</td>
</tr>
<tr>
<td>Accounts Receivable (T)</td>
<td>M</td>
<td>R</td>
</tr>
<tr>
<td>F</td>
<td>O</td>
<td>S</td>
</tr>
<tr>
<td>G</td>
<td>P</td>
<td>T</td>
</tr>
<tr>
<td>O</td>
<td>R</td>
<td>U</td>
</tr>
<tr>
<td>S</td>
<td>S</td>
<td>X</td>
</tr>
<tr>
<td>T</td>
<td>T</td>
<td>Alumni/Development (A)</td>
</tr>
<tr>
<td>U</td>
<td>U</td>
<td>A</td>
</tr>
</tbody>
</table>

Financial Aid (R) | HR/Payroll/Personnel (P) | Position Control (N) |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>A</td>
<td>E</td>
</tr>
<tr>
<td>C</td>
<td>B</td>
<td>F</td>
</tr>
<tr>
<td>E</td>
<td>C</td>
<td>G</td>
</tr>
<tr>
<td>F</td>
<td>D</td>
<td>P</td>
</tr>
<tr>
<td>H</td>
<td>E</td>
<td>M</td>
</tr>
<tr>
<td>J</td>
<td>H</td>
<td>O</td>
</tr>
<tr>
<td>L</td>
<td>O</td>
<td>P</td>
</tr>
<tr>
<td>N</td>
<td>P</td>
<td>S</td>
</tr>
<tr>
<td>O</td>
<td>R</td>
<td>T</td>
</tr>
<tr>
<td>P</td>
<td>S</td>
<td>U</td>
</tr>
<tr>
<td>R</td>
<td>T</td>
<td>X</td>
</tr>
<tr>
<td>S</td>
<td>U</td>
<td>Information Access (I)</td>
</tr>
<tr>
<td>T</td>
<td>X</td>
<td>S</td>
</tr>
<tr>
<td>U</td>
<td>R</td>
<td>Financial Aid</td>
</tr>
</tbody>
</table>

All Products

<table>
<thead>
<tr>
<th>W</th>
<th>Y</th>
<th>Z</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reserved for client forms or modules used within a Banner2000 application (character in position 1 does not equal W, Y, or Z)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Position 3** identifies the type of form, report, job, or table.

<table>
<thead>
<tr>
<th>General (G)</th>
<th>Student (S)</th>
<th>Finance (F)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>B</td>
<td>B</td>
<td>B</td>
</tr>
<tr>
<td>I</td>
<td>I</td>
<td>I</td>
</tr>
<tr>
<td>O</td>
<td>Q</td>
<td>Q</td>
</tr>
<tr>
<td>Q</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>R</td>
<td>V</td>
<td>V</td>
</tr>
<tr>
<td>T</td>
<td></td>
<td></td>
</tr>
<tr>
<td>V</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Accounts Receivable (T)**

| A           | P           | R           |
| I           | Q           | V           |

**Financial Aid (R)**

| A           | A           | A           |
| B           | B           | B           |
| I           |             |             |
| P           | I           | I           |
| R           | P           | P           |
| T           |             |             |
| V           | V           |             |

**HR/ Payroll/ Personnel (P)**

| A           | B           | C           |
| I           |             |             |
| R           |             |             |
| T           |             |             |
| V           |             |             |

**Position Control (N)**

| A           | B           | C           |
| I           |             |             |
| R           |             |             |
| T           |             |             |
| V           |             |             |

**Alumni/ Development (A)**

| S           | A           | P           |
| P           | D           | T           |
| A           |             |             |
| IDEN        | FEED        | ESKL        |

**Positions 4, 5, 6, and 7** uniquely identify the form, report, job, or table.

**Examples:**

<table>
<thead>
<tr>
<th>SPAIDEN</th>
<th>ADPFEED</th>
<th>PTVESKL</th>
</tr>
</thead>
<tbody>
<tr>
<td>S</td>
<td>A</td>
<td>P</td>
</tr>
<tr>
<td>P</td>
<td>D</td>
<td>T</td>
</tr>
<tr>
<td>A</td>
<td>P</td>
<td>V</td>
</tr>
<tr>
<td>IDEN</td>
<td>FEED</td>
<td>ESKL</td>
</tr>
</tbody>
</table>
## Appendix B: Employee Class

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Pay ID</th>
<th>Salary</th>
<th>Time Entry Method</th>
<th>Leave Category</th>
<th>Benefit Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1</td>
<td>Faculty FT Reg – Academic</td>
<td>SC</td>
<td>S</td>
<td>Auto Pay</td>
<td>IN</td>
<td>B1</td>
</tr>
<tr>
<td>A2</td>
<td>Faculty PT Reg – Academic</td>
<td>SC</td>
<td>S</td>
<td>Auto Pay</td>
<td>IN</td>
<td>B1</td>
</tr>
<tr>
<td>A3</td>
<td>Faculty FT Temp – Academic</td>
<td>SL</td>
<td>S</td>
<td>Auto Pay</td>
<td>IN</td>
<td>B2</td>
</tr>
<tr>
<td>A4</td>
<td>Faculty PT Temp – Academic</td>
<td>SL</td>
<td>S</td>
<td>Auto Pay</td>
<td>IN</td>
<td>B2</td>
</tr>
<tr>
<td>AD</td>
<td>Faculty FT Reg – Deferred Pay</td>
<td>SC</td>
<td>S</td>
<td>Auto Pay</td>
<td>IN</td>
<td>B1</td>
</tr>
<tr>
<td>B1</td>
<td>Faculty Reg FT – Annual</td>
<td>SC</td>
<td>S</td>
<td>Auto Pay/Web Leave Report</td>
<td>EL</td>
<td>B1</td>
</tr>
<tr>
<td>B2</td>
<td>Faculty Reg PT – Annual</td>
<td>SC</td>
<td>S</td>
<td>Auto Pay/Web Leave Report</td>
<td>EL</td>
<td>B1</td>
</tr>
<tr>
<td>B3</td>
<td>Faculty FT Temp – Annual</td>
<td>SL</td>
<td>S</td>
<td>Auto Pay</td>
<td>IN</td>
<td>B2</td>
</tr>
<tr>
<td>B4</td>
<td>Faculty PT Temp – Annual</td>
<td>SL</td>
<td>S</td>
<td>Auto Pay</td>
<td>IN</td>
<td>B2</td>
</tr>
<tr>
<td>B5</td>
<td>Faculty FT Federal – Annual</td>
<td>SC</td>
<td>S</td>
<td>Auto Pay/Web Leave Report</td>
<td>EL</td>
<td>B3</td>
</tr>
<tr>
<td>C1</td>
<td>Faculty FT – Other</td>
<td>SL</td>
<td>S</td>
<td>Auto Pay</td>
<td>IN</td>
<td>B2</td>
</tr>
<tr>
<td>C2</td>
<td>Faculty PT – Other</td>
<td>SL</td>
<td>S</td>
<td>Auto Pay</td>
<td>IN</td>
<td>B2</td>
</tr>
<tr>
<td>E1</td>
<td>Staff FT Reg – Exempt</td>
<td>SC</td>
<td>S</td>
<td>Auto Pay/Web Leave Report</td>
<td>EL</td>
<td>B1</td>
</tr>
<tr>
<td>E2</td>
<td>Staff PT Reg – Exempt</td>
<td>SC</td>
<td>S</td>
<td>Auto Pay/Web Leave Report</td>
<td>EL</td>
<td>B1</td>
</tr>
<tr>
<td>E3</td>
<td>Staff FT Temp – Exempt</td>
<td>SL</td>
<td>S</td>
<td>Auto Pay</td>
<td>IN</td>
<td>B2</td>
</tr>
<tr>
<td>E4</td>
<td>Staff PT Temp – Exempt</td>
<td>SL</td>
<td>S</td>
<td>Auto Pay</td>
<td>IN</td>
<td>B2</td>
</tr>
<tr>
<td>E5</td>
<td>Staff FT Federal – Exempt</td>
<td>SC</td>
<td>S</td>
<td>Auto Pay/Web Leave Report</td>
<td>EL</td>
<td>B5</td>
</tr>
<tr>
<td>E6</td>
<td>PSL FT Regular – Exempt</td>
<td>SC</td>
<td>S</td>
<td>Auto Pay/Web Leave Report</td>
<td>EL</td>
<td>B1</td>
</tr>
<tr>
<td>E7</td>
<td>PSL PT Reg – Exempt</td>
<td>SC</td>
<td>S</td>
<td>Auto Pay/Web Leave Report</td>
<td>EL</td>
<td>B1</td>
</tr>
<tr>
<td>E8</td>
<td>PSL FT Temp – Exempt</td>
<td>SL</td>
<td>S</td>
<td>Auto Pay</td>
<td>IN</td>
<td>B2</td>
</tr>
<tr>
<td>E9</td>
<td>PSL PT Temp – Exempt</td>
<td>SL</td>
<td>S</td>
<td>Auto Pay</td>
<td>IN</td>
<td>B2</td>
</tr>
<tr>
<td>N1</td>
<td>Staff FT Reg – Non-Exempt</td>
<td>SL</td>
<td>H</td>
<td>Employee Time Entry via Web</td>
<td>NL</td>
<td>B1</td>
</tr>
<tr>
<td>N2</td>
<td>Staff PT Reg – Non-Exempt</td>
<td>SL</td>
<td>H</td>
<td>Employee Time Entry via Web</td>
<td>NL</td>
<td>B1</td>
</tr>
<tr>
<td>N3</td>
<td>Staff FT Temp – Non-Exempt</td>
<td>SL</td>
<td>H</td>
<td>Employee Time Entry via Web</td>
<td>NL</td>
<td>B2</td>
</tr>
<tr>
<td>N4</td>
<td>Staff PT Temp – Non-Exempt</td>
<td>SL</td>
<td>H</td>
<td>Employee Time Entry via Web</td>
<td>NL</td>
<td>B2</td>
</tr>
<tr>
<td>N6</td>
<td>PSL FT Reg – Non-Exempt</td>
<td>SL</td>
<td>H</td>
<td>Employee Time Entry via PSL Time</td>
<td>NL</td>
<td>B1</td>
</tr>
<tr>
<td>N7</td>
<td>PSL PT Reg – Non-Exempt</td>
<td>SL</td>
<td>H</td>
<td>Employee Time Entry via PSL Time</td>
<td>NL</td>
<td>B1</td>
</tr>
<tr>
<td>N8</td>
<td>PSL FT Temp – Non-Exempt</td>
<td>SL</td>
<td>H</td>
<td>Employee Time Entry via Web</td>
<td>NL</td>
<td>B2</td>
</tr>
<tr>
<td>N9</td>
<td>PSL PT Temp – Non-Exempt</td>
<td>SL</td>
<td>H</td>
<td>Employee Time Entry via Web</td>
<td>NL</td>
<td>B2</td>
</tr>
<tr>
<td>S6</td>
<td>PSL Graduate Assistant (RA/TA)</td>
<td>SL</td>
<td>S</td>
<td>Auto Pay</td>
<td>IN</td>
<td>B3</td>
</tr>
<tr>
<td>S7</td>
<td>PSL Student – Regular</td>
<td>SL</td>
<td>H</td>
<td>Employee Time Entry via PSL Time</td>
<td>IN</td>
<td>B3</td>
</tr>
<tr>
<td>S8</td>
<td>PSL Student – Work-study</td>
<td>SL</td>
<td>H</td>
<td>Employee Time Entry via PSL Time</td>
<td>IN</td>
<td>B3</td>
</tr>
<tr>
<td>SG</td>
<td>Graduate Assistant (RA/TA)</td>
<td>SL</td>
<td>S</td>
<td>Auto Pay</td>
<td>IN</td>
<td>B3</td>
</tr>
<tr>
<td>SR</td>
<td>Student – Regular</td>
<td>SL</td>
<td>H</td>
<td>Employee Time Entry via Web</td>
<td>IN</td>
<td>B3</td>
</tr>
<tr>
<td>SW</td>
<td>Student – Work-study</td>
<td>SL</td>
<td>H</td>
<td>Employee Time Entry via Web</td>
<td>IN</td>
<td>B3</td>
</tr>
<tr>
<td>ZP</td>
<td>Retirees/Affiliated</td>
<td>ZP</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

**Leave Categories:**
- EL Exempt Leave Plan
- NL Non-exempt Leave Plan
- IN Ineligible for Leave Plan

**Benefit Categories:**
- B1 Regular Full Benefits
- B3 Taxes only
- B5 Federal Benefits
- B2 Non-Regular Benefits
- B4 Ineligible for Benefits
- NP Non-Paid Retirees/Affiliates