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Banner ODS Functional Training

Human Resources

Objectives

- Define common database and table functionality
- Explain the concept, the data, data frequency and data sources involved in reporting views
- Identify primary keys used with specific Human Resource Entity Relationship Diagrams
- List reporting and slotted views
- Describe Human Resource report templates, including template parameters

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The Basics

Business Concept Diagram Relationships

One to One	
One to Many	
Optionally One to Many	
One to Optionally Many	
Optional Non Identifying	
Subtype	

Primary Key (PK) and Foreign Key (FK)

Primary Key
- A column or columns that uniquely identify a row or rows in a reporting view.

Foreign Key
- Identifies the row or rows that are common between reporting views.

Composite and Slotted Tables

Composite Table
- Includes the main data that is extracted from source system and stored in Banner ODS

Slotted Table
- Stores data values for a specific code related to a base composite table
- Optimizes the speed of queries

Joins

Inner Join

- The most common type of join. Inner joins return all rows from multiple tables where the join condition is met.

Outer Join

- Returns all rows from one table and only those rows from a secondary table where the join condition is met.

Business Concept Diagrams

Common

Business Concept Diagrams
Common (7)

- **Event**
- **Institution**
- **Organization Entity**
- **Person Demographic**
- **Person Role**
- **Person Supplemental**
- **Relationship**

Diagram
Event
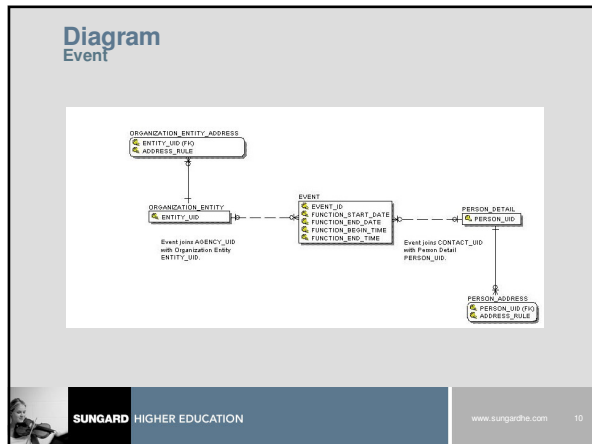
Key Reporting Views
Event

EVENT

<u>CONCEPT:</u> Contains all data for a scheduled event.

<u>DATA:</u> includes agency, college, event, function, etc.

<u>FREQUENCY:</u> One row per event.

<u>SOURCE:</u> SPRIDEN, SLPEVENT, SSRMEET, GEBFUNC, GERFCON

Content and Uses
Event

Content

- Shows basic event data such as location, function details, contact persons from the SLAEVNT Banner form

Uses

- To report on meeting events such as Faculty Tenure committee meetings

- To report on members invited to committee meetings if Event_Attendees view is brought into the Event BCD

Diagram
Institution

Key Reporting Views
Institution

INSTITUTION

CONCEPT: Contains all data that is common to institutions across administrative models and products.

DATA: includes address, contact, institution, etc.

FREQUENCY: One row per institution.

SOURCE: SOBSBGI, SORBCNT

Content and Uses
Institution

Content

▪ Shows information associated with high schools, colleges, and universities as defined on the STVSBGI and SOASBGI Banner forms. Related views can provide associated students, employees (on PPAGENL), institution demographics and characteristics.

Uses

▪ To report on characteristics of institutions that may be associated with credentialed employees such as colleges and universities

▪ To report based on an employee role, add the Employee reporting view to the Institution BCD

Diagram
Organizational Entity

Organization Entity can join Vendor by VENDOR_UID

VENDOR
- VENDOR_UID

ORGANIZATIONAL_CONSTITUENT
- ENTITY_UID (FK)

Organization Entity can join Organizational Constituent by ENTITY_UID

RECEIVABLE_ACCOUNT
- ACCOUNT_UID

Organization Entity can be joined to Receivable Account by ACCOUNT_UID

EMPLOYMENT_HISTORY
- PERSON_UID (FK)
- EMPLOYER_UID
- START_DATE
- END_DATE

Organization Entity can be joined to Employment History by EMPLOYER_UID

CONTRACT
- PERSON_UID.ACCOUNT_UID (FK)
- ACADEMIC_PERIOD
- CONTRACT_PRIORITY
- THIRD_PARTY_UID.ENTITY_UID (FK)

ORGANIZATION_ENTITY
- ENTITY_UID

Organization Entity can be joined to Address Current by ENTITY_UID

CURRENT_EMPLOYMENT
- EMPLOYER_UID (FK)
- PERSON_UID (FK)

Organization Entity can be joined to Current Employment by EMPLOYER_UID

ADDRESS_CURRENT
- ENTITY_UID
- ADDRESS_TYPE
- ADDRESS_SEQ_NUMBER

TELEPHONE
- ENTITY_UID
- PHONE_TYPE
- PHONE_SEQ_NUMBER

Organization Entity can be joined to Telephone by ENTITY_UID

ORGANIZATION_ENTITY_ADDRESS
- ENTITY_UID (FK)
- ADDRESS_RULE

Address Current can be joined to Geographic Region by ENTITY_UID, ADDRESS_TYPE, ADDRESS_NUMBER

GEOGRAPHIC_REGION
- ENTITY_UID
- ADDRESS_TYPE
- ADDRESS_NUMBER
- GEOGRAPHIC_REGION
- GEOGRAPHIC_DIVISION

Key Reporting Views
Organizational Entity

ORGANIZATION_ENTITY

CONCEPT: Contains all data that is common to organizations across administrative models and products. The Organization table reflects only the most current data; it does not track changes.

DATA: Includes basic information about an entity, e.g., a third party paying a students charges, a company matching the gift of an alumnus, or a vendor supplying goods or services.

FREQUENCY: One row per entity.

SOURCE: SPRADDR, GOREMAL, SPRIDEN, SPRTELE, SPBPERS

Content and Uses
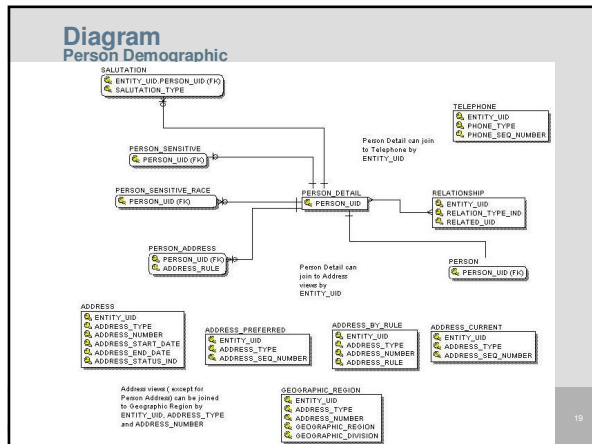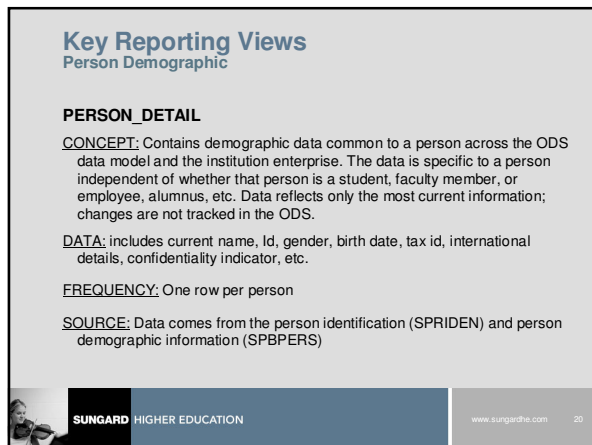### Organizational Entity

Content
- Shows non-person information for entities identified in various Banner modules such as Finance vendors, Advancement foundations and other organizations, and third party contract authorizations. The one potential connection with Human Resources is with the employer associated with an employee's prior experience on PPAEXPR Banner form.
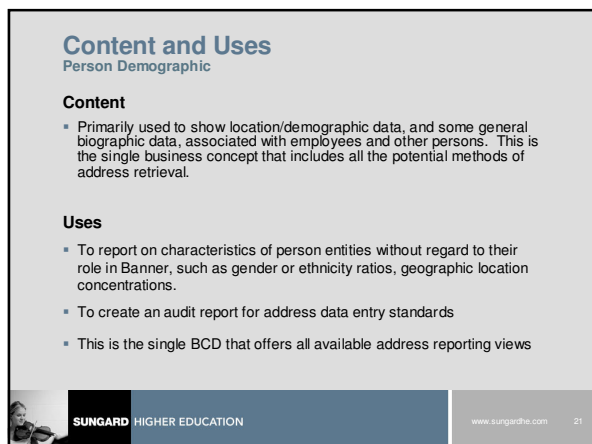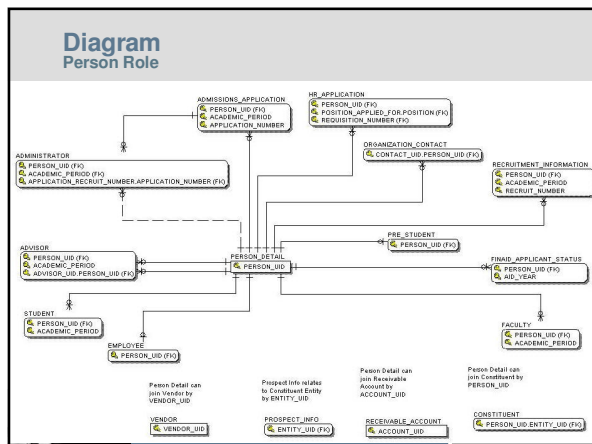
Uses
- To report on the employers with whom the institution's employees have had a prior work association

Diagram
Person Demographic

Key Reporting Views
Person Demographic

PERSON_DETAIL

CONCEPT: Contains demographic data common to a person across the ODS data model and the institution enterprise. The data is specific to a person independent of whether that person is a student, faculty member, or employee, alumnus, etc. Data reflects only the most current information; changes are not tracked in the ODS.

DATA: includes current name, Id, gender, birth date, tax id, international details, confidentiality indicator, etc.

FREQUENCY: One row per person

SOURCE: Data comes from the person identification (SPRIDEN) and person demographic information (SPBPERS)

Content and Uses
Person Demographic

Content

- Primarily used to show location/demographic data, and some general biographic data, associated with employees and other persons. This is the single business concept that includes all the potential methods of address retrieval.

Uses

- To report on characteristics of person entities without regard to their role in Banner, such as gender or ethnicity ratios, geographic location concentrations.

- To create an audit report for address data entry standards

- This is the single BCD that offers all available address reporting views

Diagram
Person Role

Key Reporting Views
Person Role

PERSON_DETAIL

CONCEPT: Contains demographic data common to a person across the ODS data model and the institution enterprise. The data is specific to a person independent of whether that person is a student, faculty member, or employee, alumnus, etc. Data reflects only the most current information; changes are not tracked in the ODS.

DATA: Includes birth date, email, name, race, etc.

FREQUENCY: One row per person.

SOURCE: SPBPERS, GOBINTL, GOREMAL, SPRIDEN, SPRMEDI

## Content and Uses
Person Role

Content

- This business concept is the only grouping of all potential roles a person may hold throughout every business area of the institution. It joins core module data to the general person detailed data.

Uses

- To report person entities that are of interest cross-institutionally

- To list horizontally in a single record line all the roles an entity holds throughout the institution

- To list other areas of the university in which employees may have additional records or may be recently active, for example employees who are also students, or employees who have donated to the institution, or employees who may serve a role with another organization, e.g. contact person, or employees who owe the institution money outside the employment relationship

Diagram
Person Supplemental
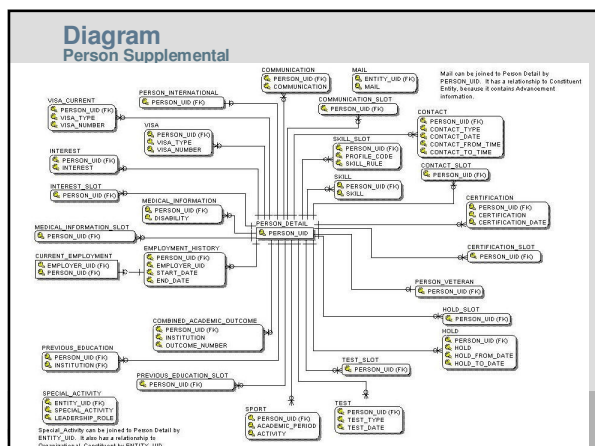
Key Reporting Views
Person Supplemental

PERSON_DETAIL

CONCEPT: Contains demographic data common to a person across the ODS data model and the institution enterprise. The data is specific to a person independent of whether that person is a student, faculty member, or employee, alumnus, etc. Data reflects only the most current information; changes are not tracked in the ODS.

DATA: Includes birth date, email, name, race, etc.

FREQUENCY: One row per person.

SOURCE: SPBPERS, GOBINTL, GOREMAL, SPRIDEN, SPRMEDI

Content and Uses
Person Supplemental

Content

- A comprehensive gathering of person data not necessarily limited within a single business area of the institution. Although components of the data may be primarily used in one enterprise module, the nature of the data deems it as shared data.

Uses

- To report comprehensively on person entities without regard to their current roles in Banner.

- To report Visa status or international information for all person entities

- To report employment data for constituents who are persons. (This is not the same as the employee data housed in the Banner HR module.)

Content and Uses
Person Supplemental

Uses con't.

- To report holds attached to a person whether they are a recruit, applicant, student, or hold any other role

- To report all manner of biographic data for audit or survey purposes without regard to specific area of institution

- To report medical or disability information for all person entities

- To list all veterans without regard to specific area of institution

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Diagram
Relationship
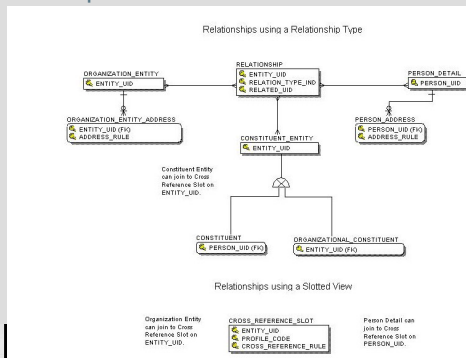
Key Reporting Views
Relationship

RELATIONSHIP

<u>CONCEPT:</u> Contains data that specifies the relationship between an entity, person or non-person, and the institution.

<u>DATA:</u> Includes employee, relationship, spouse, etc.

<u>FREQUENCY:</u> One row per entity per relation source or related cross reference per related entity.

<u>SOURCE:</u> APRCHLD, APRXREF, APRCSPS, SPBPERS, AOBORGN

Content and Uses
Relationship

Content

- Shows the nature and characteristics between Banner entities who are linked to other entities in some manner. The relationship is defined in the Advancement module.

Uses

- If the Advancement module is implemented, Relationship BCD can be used to list connections between person entities identified in Banner (i.e. has a SPRIDEN_ID) or not specifically identified in Banner. Often employees support the institution in monetary or other volunteer ways and thereby are identified as constituents in Advancement. In order to report from an employee perspective, the Employee reporting view would need to be added to the Relationship business concept

Reporting and Slotted Views
Common (57)

Activity	Employment_History
Address	Event
Address_By_Rule	Geographic_Region
Address_Current	Geographic_Region_Institution
Address_Preferred	Hold
Certification	Hold_Slot
Certification_Slot	Institution
Combined_Academic_Outcome	Institution_Characteristic
Communication (Mailing)	Institution_Demographic
Communication_Slot	Inst_Characteristic_Slot
Contact	Interest
Contact_Slot	Interest_Slot
Cross_Reference_Slot	Internet_Address
Current_Employment	Mail

Reporting and Slotted Views
Common (57)

Mail_Slot	Previous_Education
Medical_Information	Previous_Education_Attendance
Medical_Information_Slot	Previous_Education_Slot
Organization_Entity	Relationship
Organization_Entity_Address	Salutation
Past_Employment_Slot	Secondary_School_Subject
Person	Skill
Person_Address	Skill_Slot
Person_Detail	Telephone
Person International	Test
Person_Sensitive	Test_Slot
Person_Sensitive_Race	Validation
Person_Sensitive_Race_Slot	Visa
Person_Veteran	Visa_Current
	Year_Type_Definition

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Business Concept Diagrams

Human Resources

Business Concept Diagrams
Human Resources (5)

- Employee
- Human Resource Application
- Human Resource Faculty
- Payroll
- Position

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Reporting Views
Human Resources/Payroll/Position (35)

Bargaining_Unit	HR_Application_Status
Beneficiary_Dependent	HR_Requisition
Benefit_Deduction	Interview
Employee	Labor_Cost_Distribution
Employee_Earning_CY	Leave_Accrual
Employee_Earning_FY	Leave_Balance
Employee_Position	Monthly_Deduction
Faculty_Appointment_History	Payroll_Attendance
Faculty_Rank_History	Payroll_Deduction
Faculty_Sabbatical_History	Payroll_Distribution
Faculty_Tracking	Payroll_Document
HR_Application	Payroll_Earning

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Reporting Views
Human Resources/Payroll/Position (35)

Payroll_Employee_Position
Payroll_Labor_Distribution_Override
Payroll_Position_Timesheet
Payroll_Timesheet
Position_Budget
Position_Definition
Position_Labor_Distribution
Reference
Review
Tax
Yearly_Deduction

Slotted Views
Human Resources/Payroll/Position (10)

Barg_Unit_Slot

Beneficiary_Slot

Empl_Earn_CY_Slot

HR_Appl_Stat_Slot

Interview_Slot

Leave_Balance_Slot

Monthly_Deduct_Slot

Posn_Labor_Dist_Slot

Reference_Slot

Review_Slot

Diagram
Employee

Primary Reporting View
Employee

EMPLOYEE

CONCEPT: Contains organizational information on the employee, hire
dates, review dates, and immigration information

DATA: Employee primary position, start date and details.

FREQUENCY: One row per employee

SOURCE: Employee Base Table (PEBEMPL), Assignment Repeating
Table (NBRJOBS), Assignment Repeating Base Table (NBRBJOB),
Employee Review Type Repeating Table (PERREVW)

Content and Uses
Employee

Content

- Includes most general biographic, demographic, core and summary
  employee data including year and month to date earnings, job
  assignment history, leave balances, benefits and deductions, and more.

Uses

- To create an employee list based on various criteria such as current
  employment, prior employment, employee type, gender, etc.

- To report biographic and/or demographic characteristics and statistics
  of the overall employee population or a targeted portion of the
  institution's workforce

- To list all benefits and/or deductions in which employees are enrolled or
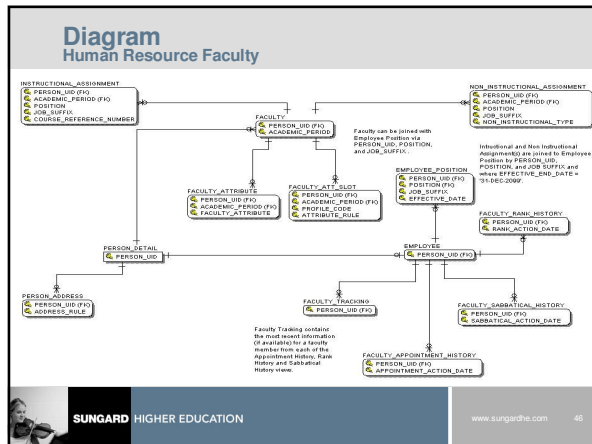 participate

Content and Uses
Employee

Uses con't.

- To create monthly or annual vendor reports or data transmissions not
  based on a specific payroll but cumulative in nature

- To create a faculty report including employee-specific data along with
  instructional and/or non-instructional data from the Student business
  area

- To list skills and qualifications by employee group for accreditation,
  benchmark, survey, or internal audit purposes

Diagram
Human Resource Application

Primary Reporting View
Human Resource Application

HR_APPLICATION

<u>CONCEPT</u>: Contains application information for job applicants.

<u>DATA</u>: Person ID, Requisition Number, Position Applied for, Position Class, Title, Application Date, Requisition Status, Interview Count, Reference Count, Skill Count.

<u>FREQUENCY</u>: One row per person per position applied per requisition number.

<u>SOURCE</u>: Applicant Base Table (PABAPPL), Position Requisition Table (PABREQU)

<u>NOTE</u>: Banner region assignment processes must be run to populate this view in ODS, either by batch (GORPGEO or GORSGEO) or individually on (GOAPGEO or GOASGEO)

Content and Uses
HR Application

Content

▪ Includes data from Banner's HR Applicant Administration business area such as position requisition, applicants for open positions, credentials of those applicants and their progress through the application and interview process.

Uses

▪ Create list of student employee applicants

▪ Gather search and hire statistics

▪ To list applicant qualification comparisons

▪ Analyze open or recently filled requisitions

Diagram
Human Resource Faculty

Primary Reporting View
Human Resource Faculty

FACULTY

CONCEPT: Contains detail biographic information about the faculty member from the Human Resources and Student administration area.

DATA: Data within this view is Academic Title, Department information and other detail

FREQUENCY: One row per faculty member per academic period.

SOURCE: Faculty Information Table (SIBFACD), Faculty Member Base Table (SIBINST), Faculty Member Department and College Table (SIRDPCL), Faculty Contract Type Table (SIRICNT), Employee Base Table (PERBFAC), Employee Assignment Table (NBRJOBS) and Year Type Definition Table (STVTERM)

Content and Uses
Human Resource Faculty

Content

- This concept gathers faculty associated data from the Human Resource and Student business areas including assignments, workload, wage structure, sabbatical, rank and tenure.

Uses

- To gather faculty assignment data in support of faculty load and compensation research
- To track faculty tenure status and progress
- To pull data for contract analysis and negotiation
- To track sabbatical eligibility and use
- To research historical faculty appointments

Diagram
Payroll

Primary Reporting View
Payroll Document

PAYROLL_DOCUMENT

CONCEPT: Created to list all relevant payroll document/direct deposit data.

DATA: Payroll Identifier (PICT_CODE), Calendar Year, Payroll Number, ID, Name, Document Number, Document Net Amount, Bank Routing Number, Bank Account Number, Bank Account Type.

FREQUENCY: One row per payroll identifier, per calendar year, per payroll number, per event sequence number, per person. If a person has a direct deposit a unique record is created for the bank account type and bank account number.

SOURCE: Document Number Repeating Table (PHRDOCM)

Content and Uses
Payroll Document

Content

- Detailed payroll information including timesheet data, earnings, deductions, leave accrual, labor distribution, payroll feed to Finance, together with core employee, job assignment, and general person biographic information.

Uses

- Extract vendor remittance detail
- To provide Finance with reconciliation detail
- To validate payroll data entry and calculations
- Track budget expenditures from a detailed perspective
- To validate leave policy compliance

Diagram
Position

Primary Reporting View
Position Definition

POSITION_DEFINITION

<u>CONCEPT</u>: Contains detailed information concerning all positions at the institution.

<u>DATA</u>: Position, Position Class, Position Status, Position Title, Position Type, Position Group, Position Location, Position Employee Class.

<u>FREQUENCY</u>: One row per position.

<u>SOURCE</u>: Position Base Table (NBBPOSN), Position Classification Rule Table (NTRPCLS)

Content and Uses
Position Definition

Content

- This business concept centers around position data as defined on NBAPOSN and NBAPBUD of Banner's Position Control module and also includes base employee and job assignment detail as well as general person biographic and demographic information.

Uses

- To report on open requisitions including position budget data
- Create audit report comparing position definition characteristics with characteristics at the job assignment level
- For labor budget analysis and planning
- Provide workforce survey information and statistics

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Self Service Reporting

Human Resources

SSR Template
Employee

Employee

- This report template uses reporting views from the Employee Business Concept Diagram. Data includes information about contact, demographic and primary position information for employees.

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Display Rules

Human Resources

Display Rules
Human Resources

Internal Group	Internal Code	Used In: (Slotted Table or View)
ADDRESS	PAYRADDR	Address By Rule, Person Address
BARGAINING UNIT	PAYRBARG	Barg Unit Slot
EARNING	PAYREARN	Empl Earn CY Slot
INSTITUTION	SERVICE_YEARS	
LEAVE	PAYRLEAV	Leave Balance Slot
SKIL	PAYRSKIL	Skill Slot
DEDUCTION/BENEFIT	PAYRPROF, PAYRYEAR **Remove the Date in the Reporting Date for the report to include all inclusive data. This date will include data from this date forward. ** PAYRYEAR – Change the year to the current year of deductions.	Benefit Deduction View
JOB SUMMARY	PAYRPROF **Remove the Date in the Reporting Date for the report to include all inclusive data. This date will include data from this date forward.	

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Questions and Answers

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