

Banner Human Resources/Position Control Release Guide

Release 8.0
April 2008



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Revision History Log**Publication Date Summary**

April 2008	New version that supports Banner Human Resources and Position Control 8.0 software.
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Introduction

This release guide documents the functional and technical enhancements made in Banner Human Resources, Release 8.0.

Enhancements for 8.0

The following enhancements have been delivered with release 8.0.

Faculty Load and Compensation Module

The current Banner Human Resources system maintains pertinent information for each faculty member as an employee of an educational institution. This includes information such as the faculty member's position number and description, job description, job labor distribution, and annual compensation information.

On the other hand, the Banner Student system contains data related to instructional and non-instructional assignments of all faculty members. This includes information such as Course Reference Numbers (CRNs), Course descriptions, Number of credits per course, and the work load of each faculty member.

With the release of Banner 8.0, a new Faculty Load and Compensation module, has been created which capitalizes and draws upon the information residing in both, Banner HR and Student systems, to deliver a contiguous, comprehensive business process that gives institutions the power to automate the derivation and calculation of appropriate compensation packages for their full-time or part-time employed faculty members based on their individual work loads.

For more details, refer to [“Faculty Load and Compensation-Functional” on page 15.](#)

Multiple-Year Encumbering

The Grants Management Project in Banner Human Resources and Position Control is concerned with enhancing existing functionality in the following key areas:

- Encumbering
- Effort Certification, and
- Labor Redistribution

Due to the extensive changes involved, the functionality in the above three areas will be covered over two consecutive Banner releases, 8.0 and 8.1. Release 8.0 of Banner Human Resources and Position Control enhances encumbering functionality, and the 8.1 release will enhance the functionality with regard to effort certification and redistribution to complete all the components of the Grants Management Project listed above.

For more details, refer to [“Multiple Year Encumbering-Functional” on page 121.](#)

Establishing Combined Benefits Limits

Banner Human Resources functionality has now been extended to check for the employee's

- Annual contribution limit-tracks a total for deductions and benefits
- Annual compensation limit-tracks a cap limit for applicable gross associated with a benefit
- Catch-up contributions
- 15-year rule plan

This extended functionality gives benefits administrators the ability to check an employee's contribution limits with regard to their participation in retirements plans, catch-up contributions, and 15-year rule plans.

For more details, refer to the section, [“Establishing Combined Deduction Limits-Functional” on page 1-209.](#)

Support for Internationalization

The Banner system is used by higher education institutions worldwide. As Banner is enhanced and modernized, one major initiative is to make the system more adaptable for use in different countries and with different languages. This ongoing effort is called internationalization (and often abbreviated I18N). Internationalization reduces the amount of custom modifications required to make Banner usable for clients in various countries.

For this release, several major changes were made to support internationalization. For more details, refer to the section, [“Support for Internationalization-Functional” on page 233](#)

Multiple Race and Ethnicity Data Entry in EPAFs

In Human Resources Release 7.1.2, the functionality of the Identification Form (PPAIDEN) was enhanced to associate a person with multiple race categories. In Human Resources 8.0, this functionality has been extended to support data entry of race and ethnicity information through EPAFs.

Race and Ethnicity information can now be added through Electronic Personnel Forms (EPAFs) on Internet-Native Banner, as well as Self-Service Banner.

Documentation Change for Problem Resolutions

Problem resolutions are summarized by module at the end of this release guide. The detailed description, impact, and resolution information for each problem resolution is delivered in a separate .txt file. The files for this release are named `humres8000resolutions.txt` and `posct18000resolutions.txt`. As a result of this change, information about problem resolutions is more consistent between release guides and the Customer Support Center.

System Requirements

Install the following minimum releases to upgrade to *Position Control* Release 8.0.

Banner General: 8.0

Banner Position Control Release: 7.0

Install the following minimum releases to upgrade to *Human Resources* Release 8.0.

Banner General: 8.0

Banner Position Control Release: 8.0

Banner Human Resources Release: 7.0

Cumulative Documentation

This document provides detailed information about the Banner Student 8.0 release only. Banner Human Resources and Position Control 8.0 is a cumulative release that also includes enhancements, RPEs, and problem resolutions delivered in the Human Resources 7.1, 7.1.1, 7.1.2, 7.1.3, 7.1.4, 7.1.5, 7.2, 7.2.1, 7.2.2, 7.2.3, 7.2.4, 7.2.5, 7.2.6, and Position Control 7.1, 7.2, and 7.3 releases. For complete documentation about these interim releases, please refer to the interim release guides identified in the table below.

Release Number	Contents	Release Date
Posn. Ctl 7.1	2004 Year-End Regulatory COBRA Reporting Enhancements	May 2005
Posn. Ctl 7.2	New Electronic Approvals Functionality New Electronic Approvals APIs	October 2005
Posn. Ctl 7.3	Student-Employee Verification Process Jobs APIs Bio-Demo APIs	May 2006
HR 7.0.1	2004 COBRA US and Canada Year-End Regulatory	February 2005

Release Number	Contents	<i>Release Date</i>
HR 7.1	2004 Year-End Regulatory COBRA Reporting Enhancements	May 2005
HR 7.1.1	IPEDS Reporting Enhancements	October 2005
HR 7.1.2	New Race and Ethnicity Categories	November 2005
HR 7.1.3	2005 Year-End US Regulatory Reporting	December 2005
HR 7.1.4	2005 Year-End Canadian Reporting	December 2005
HR 7.1.5	2005 U.S. Year-End Regulatory Reporting Electronic W-2s and W-2cs	December 2005
HR 7.2	Student-Employee Verification Process Jobs APIs Bio-Demo APIs	May 2006
HR 7.2.1	Canadian Record of Employment Enhancement	August 2006
HR 7.2.2	2006 US Year-End Regulatory Reporting	December 2006
HR 7.2.3	2006 Puerto-Rico Year-End Regulatory Reporting	December 2006
HR 7.2.4	IPEDS Regulatory Reporting for 2007	October 2007
HR 7.2.5	2007 U.S. Year-End Regulatory Reporting	December 2007
HR 7.2.6	2007 Canada Year-End Regulatory Reporting	February 2008

1 Faculty Load and Compensation-Functional



Overview

The current Banner Human Resources system maintains pertinent information for each faculty member as an employee of an educational institution. This includes information such as the faculty member's position number and description, job description, job labor distribution, and annual compensation information.

On the other hand, the Banner Student system contains data related to instructional and non-instructional assignments of all faculty members. This includes information such as Course Reference Numbers (CRNs), course descriptions, number of credits per course, schedule types, and the work load of each faculty member.

The new Faculty Load and Compensation module merges faculty information in Banner Student and Human Resources systems to capitalize and deliver a robust, contiguous, and a comprehensive business process that gives institutions the power to automate the derivation and calculation of appropriate compensation packages for their full-time or part-time employed faculty members based on their individual work loads. This, in essence describes the primary business objective.

Using this module, you can now define rules for calculation of compensation packages in Banner Human Resources and Banner Student, and evaluate work loads and actual compensation packages for full-time as well as part-time faculty members in the module's new web interface on Employee Self-Service.

The Web interface of the Faculty Load and Compensation module can be accessed by two types of self-service users:

- Faculty Compensation Administrators - who revise, review, and modify employees' salary compensation as needed.
- Faculty Members - who review and acknowledge their compensation packages.

The Faculty Compensation Administrator role is defined in Web Tailor and the Faculty Member role is determined by the self-service module if the faculty member holds records, for a present or past academic term within the module.

The Faculty Load and Compensation module is extensively flexible and robust. Some of the features that support these characteristics are:

- Flexible rules can be created in Banner HR to determine the components that make up faculty pay.
- The module is robust enough to handle changes in a faculty member's schedule (e.g., cancellations, instructor reassignments, team teaching, no-shows) with corresponding changes in relation to their compensation.
- Certain factors such as course compensation rate, a faculty member's base rate, schedule type rates for each faculty member, and the defaulted compensation components can be overridden as necessary.
- Unlimited site-specific compensation components with institutional default rates per component can be defined.
- You can also track and audit the feed of the contract/salary data between Banner® Student and Banner HR.
- When Banner Finance is *not* installed, the module also accommodates the use of an external account code for Labor Distribution maintenance.

Consequently, at a minimum, the implementation of Faculty Load and Compensation module requires the following Banner products:

- Banner Student
- Banner Human Resources
- Employee Self-Service, and
- Banner Web Tailor

The translation of the module's business objective resulted in the following changes within Banner Human Resources:

- New validation forms and rule forms have been added to provide for changes in the calculation of compensation rates by this module. These include:
 - Faculty Compensation Level Code Validation Form (PTVFLCL)
 - Incremental Compensation Code Validation Form (PTVFLIC)
 - Faculty Load Incremental Compensation Rules Form (PTRFLIC)
 - Faculty Load and Compensation Instructional Rules Form (PTRFLAC)
 - Faculty Load and Compensation Non-Instructional Rules Form (PTRNIST)
 - Faculty Load Contract Type Control Rules Form (PTRFLCT)

- Existing rule forms in Banner HR as well as Banner Student have been modified. These include:
 - Installation Rules Form (PTRINST)
 - User Codes Rules Form (PTRUSER)
 - Roll-up Security Form (NSASPSC) (Banner® Finance Installed)
- The following application forms have been modified:
 - Faculty Action Tracking Form (PEAFACT) to assign Faculty Compensation Levels
 - Faculty Assignment Form (SIAASGN). For more details refer to the Banner Student Release Guide, Release 8.0.
- Appropriate HR and user security rules have to be established for using this module. Consequently, the following security forms have been modified:
 - User Code Rules Form (PTRUSER),
 - Organizational Hierarchy Security Form (NSASPSC) and
- A new Web interface for faculty load and compensation has been created for Employee Self-Service that can be accessed by faculty administrators and faculty members. For further details, refer to the Employee Self-Service 8.0 Release Guide.
- To accommodate the self-service users, Web Tailor has been modified to include a new user role - Faculty Compensation Administrator. Faculty Administrator users must be associated with this new role on Web Tailor to access the appropriate pages.
- To migrate and populate information in the module's web interface on Employee Self-Service, a new extract process has been created in Banner HR, the Faculty Load and Compensation Extract Process (PEPFLAC). This process extracts faculty information from the Student System, combines it with the new HR compensation rules, and displays this information in Employee Self-Service.
- After the compensation have been reviewed and locked by the Faculty Compensation Administrator, Banner users can run a new apply process that determines which self-service records have to be applied in Banner HR to create appropriate job assignment records for faculty members based on the faculty compensation data in Employee Self-Service.

In essence, the Faculty Load and Compensation module bridges the gap between Banner HR and Student modules to deliver a comprehensive and complete in-house business solution that can be seamlessly adapted for decentralized as well as centrally-administrated institutions.

Key Features

Key features of the Faculty Load and Compensation module include:

- The decentralized maintenance for summary and detail views of faculty load and compensation, positions, class assignments, and load history by course.
- The ability to capture a base rate by faculty member. Base rate is the amount of pay for the contract (salaried) or the credit/course (hourly)
- Generate an overload job for courses or non-instructional assignments considered as overload payments for the faculty member.
- A hierarchical roll up of departmental load and compensation information available for viewing and approvals, with appropriate locking of records when records are complete.
- Enter free-form comments to support compensation calculations.
- Allow select compensation components to be paid as default earnings.
- Maintain job records for updating compensation and employment details
- The ability to optionally view and maintain Labor Distributions for each job assignment
- Accommodate instructional and non-instructional assignments to be part of the faculty member's contract and wage calculation.
- Define whether a single job should be generated or multiple jobs generated for multiple courses.
- Define whether the term begin and end date creates a defaulted job start and end date.
- The ability to determine proper compensation for F/T (salaried) and P/T (hourly) faculty based on faculty load details in Banner® Student.
- Default Position Labor Distribution to the faculty member's compensation record, at which point the institution can override a portion or all of the distributions.
- Provide for the creation and maintenance of a faculty job assignment in Banner® HR (NBAJOBS), based on appropriate compensation rules, rates and hour.
- Create job records in Banner Human Resources.

- Provide for capturing load used in compensation calculation for audit and history purposes in self-service. (Maintain audit history for the components of load, rates and contract timeframe).
- Provide compensation summary pages of faculty by Term, with the ability to download the information to a spreadsheet.
- Provide the ability to attach contract information through a link to the Banner Document Management System from the Faculty Compensation Summary View.

For part-time or hourly faculty, the following features have been included:

- The ability to determine and pay different rates by schedule type. Schedule Type is defined as the type of instruction method applied to a course, such as lecture, lab, etc.
- The faculty responsibility (%) will be considered for an assigned course when performing the course compensation calculation.
- A site or institution can define whether individual courses are paid by credit hour, contact hour workload, course enrollment or other (flat amount).
- Allow a course compensation rate to be calculated by course, by faculty member, by term. Compensation components will contribute to this course compensation rate.
- Display the compensation rate per course. This rate is the calculated result of the employee's base rate, according to the Schedule Type, multiplied by contact or credit hours. This final compensation rate can be overridden.

For full-time or salaried faculty, self-service components are used to pay an appropriate overload rate. This includes the establishment of instructional or non-instructional assignments that contribute to the overload job.

User-centric Features

Faculty Compensation Administrators can perform the following tasks:

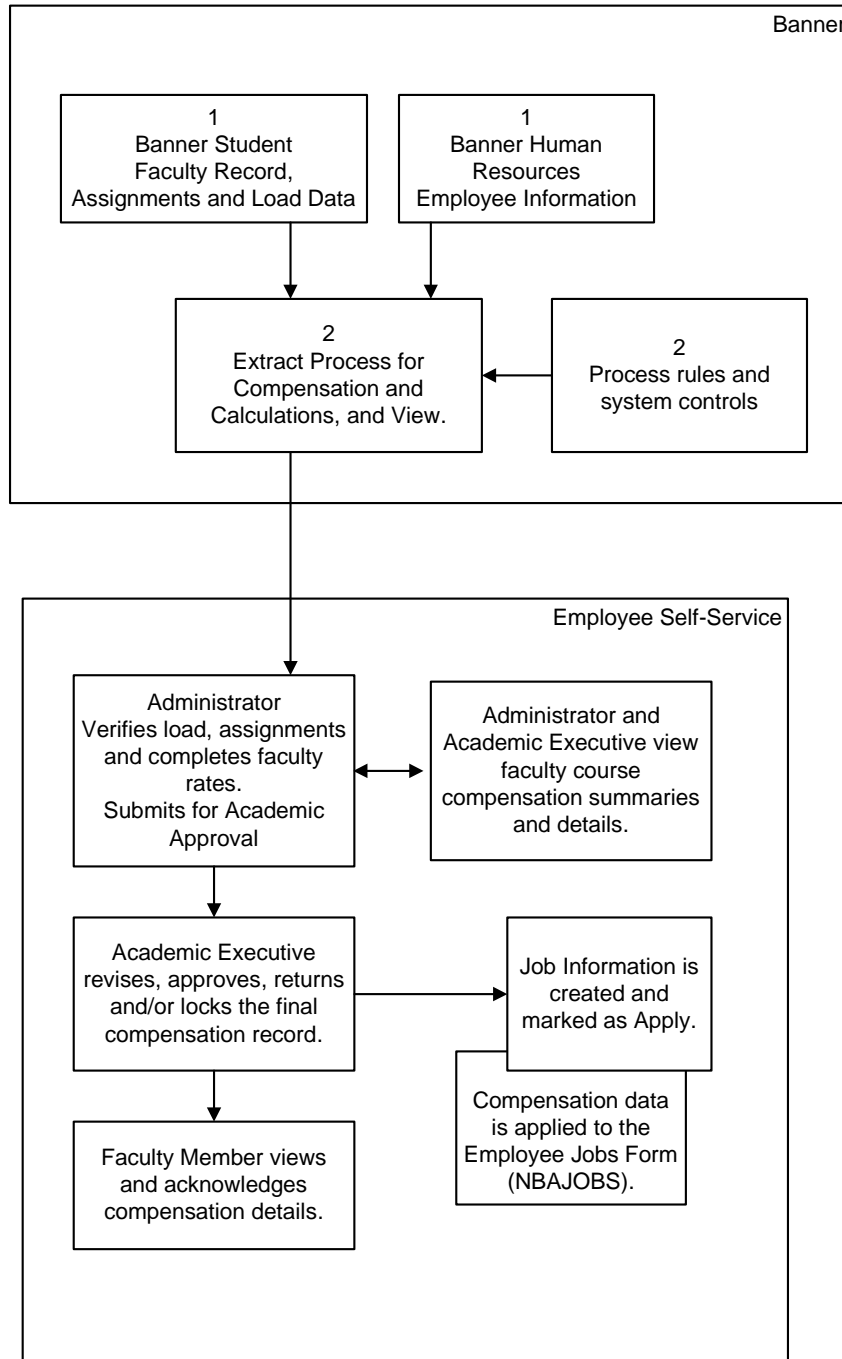
- Define schedule types and an institutional default rate per schedule type.
- Accommodate multiple schedule types per course and factor those appropriately in compensation calculations.
- Build and lock the faculty load and compensation data.
- Allow the user to further define a faculty member's job begin and end date.
- View the same information that is available to a faculty member.

Faculty members, can perform the following tasks:

- Review the summary and detail of their compensation online. This feature has to be enabled by a site or institution.
- Ability to acknowledge that they have reviewed the components of their compensation for the term. The system then captures the date and time of this acknowledgement.
- View load and compensation information by term, course and position/suffix.
- Insert comments on their records.

New Business Process Flow

At a high level, the following flow chart depicts the work flow and touch points of interaction between Banner Human Resources and Employee Self-Service.



Assumptions

Assume the following to work with the Faculty Load and Compensation module:

1. Administrative users of this module must be set up as Faculty Compensation Administrators in Web Tailor in order to create faculty compensations.
2. A new optional field, **Faculty Compensation Level**, can be used to determine rates for part-time faculty in this module.
3. Faculty Compensation Level data will be tracked *only* on the Faculty Action Tracking Form (PEAFACD) in Banner Human Resources.

 **Note**

Faculty Compensation Level information will *not* be tracked on either the Faculty/Advisor Information Form (SIINST) of Banner Student or the Faculty Information Form (PEAFACD) of Banner Human Resources. ■

4. The Faculty Load and Compensation module will *not* create benefit records for employees.
5. The Faculty Load and Compensation module will *not* create employee records for employees.

New Tasks

Set Up Web Tailor for Faculty Compensation

The following tasks must be completed by the Web Tailor Administrator in Employee Self-Service:

- Set Up Access to the Faculty Load and Compensation Menu
- Set Up Faculty Compensation Administrators

For detailed descriptions of these tasks, refer to the *Release Guide* of Employee Self-Service, 8.0

Banner System-Level Set Up for Faculty Compensation

Set up rules in the following Banner forms to implement security for the faculty compensation module:

Warning

Do not modify the security settings without prior consultation with your technical support and functional user teams. ■

1. On the Installation Rules Form (PTRINST):
 - 1.1. Set up and/or verify the security at the following levels: **Employer Security**, **Salary Security**, and **Employee Class Security**. These levels are typically preset by your site administrator as it used by all Banner HR modules.
 - 1.2. Determine whether Organizational Hierarchy Security must be enabled for this application. If so, select the **Organization Security** indicator for the faculty compensation module.

Note

It is important to note that if your site utilizes the **Organization Security** indicator for Banner HR, then the faculty compensation module will also use this setting. This indicator is used to activate a position-organization based security for faculty compensation in Employee Self-Service. If left unchecked, organization security will not be enforced for this module in Employee Self-Service at the site unless it is specifically provide for by Organizational Hierarchy. ■

Establish an Organization Hierarchy

Before setting up organization security for users, first establish an organization hierarchy in Banner Finance. The Organizational Hierarchy security is an optional feature for use within the Faculty Load and Compensation module.

An organization hierarchy establishes a parent-child relationship between organization codes that results in a hierarchical sequence of preceding and succeeding organization codes.

Example

Consider the following hierarchy:

Organization Level						
1	2	3	4	5	6	Description
001						Office of the President
	100					Office of the Provost
		110				College of Arts & Sciences
			111			Office of the Dean
				120		Biology Department
					121	Genetics Department
				122		Physics Department
				125		Art History Department
				135		Geology Department

If John Smith is set up with *Update* access for organization code *111*, he has access to data in the following child organizations: *120*, *121*, *122*, *125* and *135*.

If *Banner Finance* is installed, define an organization hierarchy in FTMORGN. This establishes record-level access (based on Budget Organization code within the Position number), and controls record locking prior to applying new job records. For detailed form and field descriptions, refer to the *Online Help* of Banner Finance.

If *Banner Finance* is *not* installed, define an organization hierarchy on the Organization Code Validation Form (PTVORGN). For detailed form and field descriptions, refer to the *Online Help* of Banner Human Resources.

Set Up HR Security for Faculty Compensation Users

Review security for all users of the faculty compensation module at the following four levels:

- Organization
- Employer
- Employee Class
- Salary

Employer Security

Each user can be granted employer security if the Employer Security indicator is enabled on PTRINST for the enterprise. Users with this type of security have access to information at the Employer level.

Example

Access of information within a specific payroll unit of a multi-enterprise system.

To establish employer security for a user, select the **Master Employer** indicator on the User Codes Rule Form (PTRUSER). This grants access to all employer codes in Banner.

If you wish to limit the user's access to information at this level, do not check the **Master Employer** check box. Specify a range with appropriate Employer codes on the Employer Security Form (PSAEMPR).

Note

The value specified in these fields also applies to all other modules of Banner Human Resources. ■

Employee Class Security

Each user can be granted Employee Class security if the Employee Class indicator is enabled on PTRINST for the enterprise. Users set up with security at this level have access to all those employee records associated with each employee class.

To establish employee class security for a user, select the **Master Employee Class** check box on the User Codes Rule Form (PTRUSER). This grants the user access to *all* Employee Classes created in Banner Human Resources.

If you wish to limit the user's access towards employee classes, do not check the **Master Employee Class** check box. Specify a range of employee codes on the Employee Class Security Form (PSAECLS).

 **Note**

The value specified in these fields also applies to all other modules of Banner Human Resources. ■

Salary Level Security

Specify user security and access at the salary level by entering the **Maximum Salary Level** to which a user can access and update information in Banner. This setting will evaluate all present and past jobs and enable access if the Maximum Salary Level is greater than any of the employee's job records.

 **Note**

The value specified in this field also applies to all modules of Banner Human Resources. ■

Organization Security

Faculty compensation users can be established with total or limited access to organization codes, if **Organizational Security** has been enabled on PTRINST.

1. Select the **Master Organization** indicator on the User Codes Rules Form (PTRUSER) to set up a user with default access to *all* organization codes created in Banner Human Resources.

Otherwise, limit the user's access by specifying a range of organization codes on the Organization Security Form (PSAORGN).

 **Note**

The above two fields establish the user's organization level security for *all* modules within Banner Human Resources. Additionally, this security setting will not be accessed if the site is using Organizational Hierarchy processing. ■

2. Next, select the **Faculty Compensation Master Organization** field on the User Codes Rules Form (PTRUSER) to set up the user's organization level access *specifically* for the faculty compensation module in Employee Self-Service. Choices include:
 - *Update* access - Users can access, update, query, and lock records for *all* defined organization codes in Employee Self-Service.
 - *Query* access - Users can query and access records for *all* defined organization codes in Employee Self-Service.
 - *None* (No access) - Users have *no* access to any of the organization codes unless organization records are established on PSAORGN or, for hierarchical access on NSASPSC (below).

 **Note**

Go to Step 3 if you wish to give *Update* access to users for specific organization codes when using organizational hierarchy processing. ■

3. Set up faculty compensation users with *Update* access to *specific* organization codes on the Organizational Hierarchy Security Form (NSASPSC). (Optional step)

 **Note**

Based on the established organization hierarchy, they will have default access to those organizations that are related to the parent organization code.

The Organizational Hierarchy Security Form (NSASPSC) is available only if Banner Position Control is installed at your site.

If you specify a user with *Update* access in the **Faculty Compensation Master Organization** field on the User Codes Rule Form (PTRUSER) as well as on the Organizational Hierarchy Security Form (NSASPSC), the rule on PTRUSER takes precedence over NSASPSC. In this example, the user would have **Master Organization** access to all codes. ■

Verify Data for Faculty Compensation

Verify (or create) the following information before using Faculty Load and Compensation module:

1. On the Identification Form (PPAIDEN) (or on SPAIDEN in Banner General):
 - Verify that faculty members have been created prior to being assigned classes.
 - Verify that **SSN, Gender, DOB, Ethnicity** and **Citizenship** have been populated for each faculty member hired as an employee.
 - Verify that an active address exists for each faculty member hired as an employee.
2. On the Payroll Calendar Rules Form (PTRCALN), verify that payroll calendar entries have been created for all payroll periods relative to the terms for which faculty compensation will be calculated.
3. On the Employee Form (PEAEMPL), ensure that faculty members have an existing record that is not terminated.
4. In Banner Student,
 - 4.1. Verify all course and non-instructional assignments have been associated with an *Active* contract, on the Faculty/Advisor Information Form (SIAINST), if an assignment has to be extracted for computations in Employee Self-Service. Otherwise, the assignment will not be extracted, and no course compensation will be created or maintained.

Also verify that the faculty member is affiliated with one or more Contract Types that will be associated with their instructional and non-instructional assignments.
 - 4.2. Verify that each course and non-instructional assignment has been assigned a Position and Suffix on the Faculty Assignment Form (SIAASGN).
 - 4.3. Verify that the Faculty Contract Type Code Validation Form (STVFCNT) will be used to identify allowable load faculty types (non-credit teaching, credit teaching, professional expert, counselors).
 - 4.4. Verify that the Faculty Non-Instructional Type Validation Form (STVNIST) will be used to identify faculty non-instructional type codes.

Track by Faculty Levels

A new *optional* feature, Faculty Levels, has been provided to calculate faculty compensation packages, taking into consideration, factors such as seniority, teaching experience. This feature allows the institution to establish multiple base rates for payment to part-time faculty.

To enable faculty compensation level tracking:

1. Set up appropriate codes and rate schedules for each level on the Faculty Compensation Level Code Validation Form (PTVFLCL).
2. Associate a faculty level code with each faculty member on the Faculty Action Tracking Form (PEAFACT) in Banner Human Resources.

 **Note**

This feature is not available for institutions that track their faculty data on the Faculty Information Form (PEAFACD).

The Faculty Action Tracking Form (PEAFACT) is an enhanced version over the latter in terms of the type of information and level of detail tracked by the form. It is recommended that enterprises migrate towards using the Faculty Action Tracking Form (PEAFACT) as any future enhancements will be based on this form. To migrate data from the Faculty Information Form (PEAFACD) to the Faculty Action Tracking Form (PEAFACT) run the script, `PERBFACU.SQL`. This script is located in the `..payroll\misc` directory of Banner. ■

Set Up Calculation Rules for Faculty Compensation

Set up rules for faculty compensation calculations on the following Banner forms:

1. For part-time faculty members, establish compensation codes on the Incremental Compensation Code Validation Form (PTVFLIC).

Incremental compensation is optional within the module. It is intended for those faculty members that are being paid on a course-basis. However, it will be helpful if there are extra compensation details associated with pay premiums such as extra compensation for high enrollment, distant commuting, pre-arranged course expense, etc.

2. (Optional) Establish a set of codes to identify faculty levels on the Faculty Compensation Level Code Validation Form (PTVFLCL).

The Compensation Level is intended for use by part-time faculty members, where there are multiple levels of pay based upon institutional criteria such as teaching experience, cumulative credits, rank, or other factors.

3. This task is related to Step 1 indicated above. Specify a Base Rate, associate a Calculation Method for compensation, and specify a percentage of course compensation, for each pre-defined incremental compensation code on the Faculty Load Incremental Compensation Rules Form (PTRFLIC).

4. For part-time faculty computations, specify a base compensation rate and associate a calculation method for each *faculty schedule type* on the Faculty Load and Compensation Institution Rules Form (PTRFLAC).

Note

Use PTRFLAC form to establish compensation rates for all part-time instructional assignments. ■

5. Schedule Type refers to the medium of instruction and is associated with all instructional assignments on the Faculty Assignment Form (SIAASGN).

Example

A course can be conducted online or in a lecture setting at a campus.

6. Next, access the Faculty Load and Compensation Non-Instructional Rules Form (PTRNIST) to establish base rates and associate calculation methods to determine compensation for all *non-instructional activities* performed by part-time faculty members. This rule uses the Non-Instructional Code in Banner Student and will be matched with data from SIAASGN.
7. If you plan to implement the self-service module of Faculty Load and Compensation, access the Faculty Load Contract Type Control Rules Form (PTRFLCT) to specify how faculty compensation records must be evaluated and viewed on Employee Self-Service. This task provides the Contract Codes that have been assigned for the term and provides important data for processing information in the module.

Run the Faculty Load and Compensation Extract Process (PEPFLAC)

Run the Faculty Load and Compensation Extract Process (PEPFLAC) specifying the following report parameters.

Report Parameter	What to Enter?
Term Code	Term Code as established in Banner Student.
Part of Term	(Optional) Part of Term as established in Banner Student.
Process Mode	Indicate the run mode of the extract process. Choices include: <i>Initial (I)</i> Extracts faculty data from Banner Student and HR systems for the first time. This option can be used for any new faculty records entered into Banner. <i>Recreate (R)</i> Based on the run criteria, replaces only the previously extracted data with new extracted information for a specified Term Code. <i>Add/Delete (A)</i> Compares faculty assignment data on Employee Self-Service with those in Banner Student to make appropriate changes for only those records affected by changes as per Banner Student.
Contract Type	The Contract Type Code associated with a faculty member that has been assigned in Banner Student on the Faculty Assignment Form (SIAASGN). For example, <i>FS</i> - Fall/Spring Contract, <i>S</i> - Summer Contract.
Employee Class	(Optional) The Employee Class associated with a Position ID in Banner Human Resources. This option allows for a specific faculty group, such as Part-Time, to be processed separately.

Report Parameter	What to Enter?
Process Individual ID	<p>Indicate if a specific employee ID is to be extracted from Banner. Choices include:</p> <p>Yes (Y) Process an individual employee ID.</p> <p>No (N) Do not process an individual employee ID.</p>
Identification Number	Enter the employee's ID if you indicated <i>Yes</i> to process an individual ID for the previous parameter.
Job Change Reason	The reason for a change in a faculty member's job assignment.
Use Population Selection	<p>Indicate if the data must be extracted from a pre-defined subset or population of faculty members. Choices include:</p> <p>Yes (Y) Use population selection</p> <p>No (N) Do not use population selection.</p>
Population Selection ID	<p>Identify the population to be used by the extract process.</p> <p>Specify this parameter only if you set the Use Population Selection parameter to <i>Y</i>.</p>
Creator ID	<p>Creator ID for population selection.</p> <p>Enter this parameter only if you set the Use Population Selection parameter to <i>Y</i>.</p>
Application ID	<p>Application ID for population selection.</p> <p>Enter this parameter only if you set the Use Population Selection parameter to <i>Y</i>.</p>

Access Faculty Load and Compensation on Employee Self-Service

For a detailed description of the functionality of the Faculty Load and Compensation module, refer to the Employee Self-Service Release Guide for Release 8.0.

The self-service documentation includes task-oriented procedures, functionality of self-service pages, and corresponding field descriptions.

Run the Upload Process

Run the Faculty Compensation Upload Process (PEPFCAP) specifying the following report parameters:

Report Parameter	What to Enter?
Term Code	Enter the Term Code for which you wish to upload information into Banner.
Process Code	Select the process run mode. Choices include: Edit (E) The process performs error checks, produces a detailed report of all records processed without making any changes to the database. Always run this process mode before using the Update mode. Update (U) The process applies all changes made to the job assignment records, and makes permanent changes to the database.
Contract Type	Enter the faculty member's Contract Type Code.
Suppress Warnings	Indicate if process should suppress NBAJOBS warning messages. Choices include: Yes (Y) Yes, suppress warning messages. No (N) No, do not suppress warning messages.
Process Acknowledged Only	Indicate if the process should upload faculty compensation records of only those employees who have acknowledged their compensation. Choices include: Yes (Y) Yes, process only acknowledged records. No (N) No, process all records.

New Forms

The following new forms have been added to Banner Human Resources for the Faculty Load and Compensation module.

Validation Forms

Two new validation forms have been added.

- [“Faculty Compensation Level Code Validation Form \(PTVFLCL\)” on page 35](#)
- [“Incremental Compensation Code Validation Form \(PTVFLIC\)” on page 36](#)

Rule Forms

Four new rule forms have been added.

- [“Faculty Load Incremental Compensation Rules Form \(PTRFLIC\)” on page 37](#)
- [“Faculty Load and Compensation Instructional Rules Form \(PTRFLAC\)” on page 40](#)
- [“Faculty Load and Compensation Non-Instructional Rules Form \(PTRNIST\)” on page 46](#)
- [“Faculty Load Contract Type Control Rules Form \(PTRFLCT\)” on page 52](#)

Incremental Compensation Code Validation Form (PTVFLIC)

Define specific compensation codes on the Incremental Compensation Code Validation Form (PTVFLIC) for part-time faculty members who receive additional compensation to be paid on a course-by-course basis, or for items such as course planning and preparation, multiple degrees, teaching at a distant campus, employee with a specialized skill, and for other prearranged reasons. This increment will be added to the compensation that is calculated for each course and will be charged to the same Position.



Note

This validation form is specific to part-time faculty members.

Incremental Compensation Code	Description	Activity Date	User ID
COURSE	Course Planning	10-DEC-2007	MKRISHNA
DISTANT	Teach at a Distant Campus	10-DEC-2007	MKRISHNA

Field	Description
Incremental Compensation Code	Enter an eight-character maximum alphanumeric compensation code. For example, CP - Course Planning and Preparation, DCT- Distant Campus Teaching, SPSK - Specialized skills, etc.
Description	Enter a description of the incremental compensation code specified in the previous field.
Activity Date	Displays the date on which the information was last added or updated.
User ID	Displays the Banner ID of the user who last added or updated relevant information.

Faculty Load Incremental Compensation Rules Form (PTRFLIC)

Access the Faculty Load Incremental Compensation Rules Form (PTRFLIC) to specify the following for each type of incremental compensation code:


- specify a base rate
- associate a calculation method for compensation or
- specify a percentage of course compensation, if necessary.

This information will be used to calculate any additional increments paid to a faculty member over and above their initial compensation. It is specified on a Term-by-Term basis and can be copied forward when the rates require adjustment in future terms.

Key Block

Field	Description
Term	Select a predefined term for which you wish to specify incremental compensation codes.
Search	(STVTERM)
	Banner displays a description of the selected term code.

Main Block

Field	Description
From Term	Select the term code from which the incremental compensation codes are to be copied.
Copy	Select the Copy icon to copy incremental code rules from one term to the next.
To Term	Select the term code to which the incremental compensation codes are to be copied.
Incremental Compensation Code	<p>Search and select a predefined Incremental Compensation code from the pull-down list.</p> <p>For example, <i>CP</i> - Course Planning and Preparation, <i>DCT</i>- Distant Campus Teaching, <i>SPSK</i> - Specialized skills, etc.</p> <p>Banner displays a description of the selected code.</p>
Incremental Rate	<p>Enter the amount or rate for an incremental compensation code. This rate is usually associated with a flat dollar amount.</p> <p> Note Do not enter a value in this field if you select the <i>Percentage of Course</i> Calculation Method. For more details, see the following field description. ■</p>
Calculation Method	<p>Select the calculation method that should be used to calculate the additional increment from the pull-down list. Choices include:</p> <p><i>Credit Hours</i></p> <p><i>Contact Hours</i></p> <p><i>Generated Credit Hours</i></p> <p><i>Headcount</i></p> <p><i>Workload</i></p> <p><i>Flat Amount</i></p> <p><i>Percentage of Course</i></p>
Percentage of Course Compensation	<p>Enter a percentage amount that is to be added to the total compensation. Specify this field only if you select <i>Percentage of Course</i> in the Calculation Method. This can not be used together with an Incremental Rate when specifying a single code.</p>

Field	Description
User ID	Displays the Banner ID of the user who last added or updated relevant information.
Activity Date	Displays the date on which the information was last added or updated.

Copy Compensation Rules

Copy incremental compensation rules from one term to the next on the Faculty Load Incremental Compensation Rules Form (PTRFLIC) to adjust the rates for future terms as follows:

1. Enter a new value for **Term**.
2. Click **Copy**.
3. Select an existing term in **From Term**.
4. Save.

Incremental Compensation Code	Description	Activity Date	User ID
COURSE	Course Planning	10-DEC-2007	MKRISHNA
DISTANT	Teach at a Distant Campus	10-DEC-2007	MKRISHNA

Faculty Load and Compensation Instructional Rules Form (PTRFLAC)

For any course-based (part-time) contracts associate a calculation method and specify base compensation rates for each faculty schedule type. These rates and calculation methods will be used to determine the initial calculation of a faculty member's compensation.

Large institutions or those that have decentralized administrative operations can set up this information for each term, college, campus and contract type. If factors such as seniority or faculty levels also impact the determination of the initial compensation rates, this can be specified in the Faculty Institutional Level Rate block.

This rule form consists of a:

- Key Block
- Instructional Rules Rate Block
- Faculty Instructional Level Rate Block, and
- Copy Rules From Window

Term: 200731 Fall 2006 (FLAC Tech Test) **College:** AS College of Arts & Sciences **Copy Rules:** [icon]

Campus: M Main **Contract Type:** FT Fall, Spring, Summer (FLAC)

Instructional Rules Rate

From Term: 200731 **Copy:** [icon] **To Term:** 999999

Schedule Type	Base Rate	Calculation Method	Faculty Levels Exist	User ID	Activity Date
>> LE1 Lecture (FLAC Credit)	1,550.00	Credit Hours	<input checked="" type="checkbox"/>	JBRIGGS	13-JUN-2007
LE3 Lecture (FLAC Generated Cred)	1,400.00	Generated Credit Hours	<input type="checkbox"/>	JBRIGGS	13-JUN-2007
LE4 Lecture (FLAC Headcount)	75.00	Headcount	<input type="checkbox"/>	JBRIGGS	13-JUN-2007
OL1 Online Course (FLAC Credit)	1,550.00	Credit Hours	<input type="checkbox"/>	KIDJOHNSO	14-SEP-2007
OL2 Online Course (FLAC Contact)	1,550.00	Contact Hours	<input type="checkbox"/>	KIDJOHNSO	14-SEP-2007


Faculty Instructional Level Rate

Faculty Level	Level Rate	User ID	Activity Date
01 Workload under 3	1,660.00	KIDJOHNSO	15-OCT-2007

Key Block

Search and select a **Term, College, Campus** and **Contract Type** in the Key block.


Alternatively, click **Copy Rules** to access the Copy Rules From window where you can specify details of an existing term code *from* which rules are to be copied to the term code specified in the Key block. In this fashion, you can copy rates from one campus or college to another.

Field	Description
Term	<p>Search and select a term code from the Options List window for which you wish to specify the calculation methods and base compensation rates on this rules form.</p> <p>The Options List window allows you to choose a term with predefined rules or a new term code. Existing term codes are those for which rules have already been defined on this rule form.</p> <p>Search Term Code Validation Form (STVTERM)</p> <p>Banner displays a description of the selected code.</p> <p> Note The term code specified in this field is the <i>destination</i> term code for which you wish to specify rules. ■</p>
College	<p>Search and select a valid college code from the Options List window. Otherwise, choose an existing term code to populate all the other Key block elements automatically.</p> <p>Search College Validation Form (STVCOLL)</p> <p>Banner displays a description of the selected code.</p>
Campus	<p>Search and select a valid campus code from the Options List window. Otherwise, choose an existing term code to populate all the other Key block elements automatically.</p> <p>Search Campus Validation Form (STVCAMP)</p> <p>Banner displays a description of the selected code.</p>

Field	Description
Contract Type	<p>Search and select a contract type code from the Options List window. Otherwise, choose an existing term code to populate all the other Key block elements automatically.</p> <p>Search Faculty Contract Type Code Validation Form (STVFCNT)</p> <p>Banner displays a description of the selected code.</p>
Copy Rules	<p>Select the Copy Rules icon to access the Copy Rules From window where you can specify details of an existing term code <i>from</i> which rules are to be copied to the destination term code specified in the Key block.</p> <p>You can also copy rules from one college, campus, and contract type to another.</p>

Instructional Rules Rate Block

Access the Instructional Rules Rate block to identify schedule types with the Key block elements. Also associate a base rate, a calculation method, and view if faculty levels exist for any of the Schedule Types.

Field	Description
	Copy rules from one term to the next by specifying information in the following fields.
From Term	Displays the term code from which the rules begin to be effective.
Copy	Select this button to copy the rules from one term to the next.
To Term	Displays the term code when the rules cease to be effective.
Schedule Type	<p>Search and select a schedule type code from the Schedule Type Code Validation Form (STVSCHD).</p> <p>Search Schedule Type Code Validation Form (STVSCHD)</p> <p>Banner displays a description of the selected code.</p>
	<p> Note</p> <p>Schedule Type codes must be initially created in Banner Student and is embedded in each faculty assignment on SIAASGN. ■</p>
Base Rate	Enter a base rate for each schedule type.

Field	Description
Calculation Method	<p>Select the calculation method that should be used to determine the initial calculation of a faculty member's compensation from the pull-down list. Choices include:</p>
Contact Hours	<p>Represents the faculty's weekly contact hours for a course.</p>
	<p>Using this method, Initial Compensation = Contact Hours x Base Rate.</p>
	<p>Note: The Percentage of Responsibility of the faculty member is already taken into consideration in Banner Student.</p>
Credit Hours	<p>Represents the number of credits associated with a course.</p>
	<p>Using this calculation method, Initial Compensation = Credit Hours x Base Rate.</p>
Generated Credit Hours	<p>Generated credit hours is calculated by considering the credit hours, headcount, and the percentage of responsibility. All these factors are accounted for in Banner Student.</p>
	<p>Using this method, Initial Compensation = Generated Credit Hours x Base Rate</p>
Headcount	<p>The number students enrolled in a course.</p>
	<p>In this case, Initial Compensation = Headcount x Base Rate</p>
Workload	<p>The faculty member's workload is used in the calculation.</p>
	<p>Using this method, Initial Compensation = Workload x % of Responsibility x Base Rate</p>
Flat Rate	<p>A flat amount per course is determined as the compensation. This method disregards all other factors listed above.</p>

Field	Description
Faculty Levels Exist	(Optional) This indicator is automatically selected if faculty levels are also considered in determining the faculty member's initial compensation. If so, enter rates for each faculty level in the following Faculty Institutional Level Rate block. Display only.
User ID	Displays the user's Banner ID who created or updated information.
Activity Date	Displays the date on which the information was created or updated.

Faculty Instructional Level Rate Block

This block displays faculty levels, if specified, for each schedule type entered in the previous block, the Instructional Rules Rate block.

This block consists of four fields— **Faculty Level**, **Level Rate**, **User ID**, and **Activity Date**.

Enter information in this block only if your institution uses other factors such as the faculty member's teaching experience, specialization, educational levels, seniority, etc. to determine the faculty member's initial compensation. These levels match with the Faculty Compensation Level designated on the Faculty Tracking Form (PEAFAC). A rate structure for each faculty level can be set up in this block.

Note

To default the correct rate structure, it is crucial that you specify the faculty level of each faculty member on the PEAFAC form. ■


Field	Description
Faculty Level	Search and select the faculty levels for which you wish to specify rates. Search Faculty Compensation Level Code (PTVFLCL) Banner displays a description of the selected code.
Level Rate	Enter a base rate for each faculty level.
User ID	Displays the user's Banner ID who created or updated information.
Activity Date	Displays the date on which the information was created or updated.

Copy Rules From Window

Access the Copy Rules From window to copy rules from one term to the next by specifying the **Term**, **College**, **Campus** and **Contract Type**.

In this window, specify the *source* from which the information is to be copied.



Field	Description
Term	First, search and select a Term code as the source for copying rules. Banner displays a description of the selected code.  Tip Refine the source further by selecting appropriate College, Campus and Contract Type codes.
College	Search and select an existing College code as the source for copying rules. Banner displays a description of the selected code.
Campus	Search and select an existing Campus code as the source for copying rules. Banner displays a description of the selected code.
Contract Type	Search and select an existing Contract Type code which you wish to copy rules. Banner displays a description of the selected code.
Process Rules	Select this button to populate the destination term code specified in the Key block with rules associated with the source Term Code , College , Campus and Contract Type .

Faculty Load and Compensation Non-Instructional Rules Form (PTRNIST)

Establish base rates and associate calculation methods to determine compensation for non-instructional activities performed by part-time faculty members, such as, curriculum development, department administrative activities, etc. on the Faculty Load and Compensation Non-Instructional Rules Form (PTRNIST). Establish information for each term and contract type. You can also copy rates from one term and/or a contract type to a new term.

If extraneous factors such as seniority, academic qualifications etc. are considered, then specify rates for each faculty level in the Faculty Non-Instructional Level Rate Block.

This rule form consists of a:

- Key block
- Non-Instructional Rules Rate Block
- Faculty Non-Instructional Level Rate Block
- Copy Rules From Window

Term: 200731 Fall 2006 (FLAC Tech Test) **Contract Type:** FT Fall, Spring, Summer (FLAC) **Copy Rules:** [Icon]

Non-Instructional Rules Rate

From Term: 200731 **Copy:** [Icon] **To Term:** 999999

Non-Instructional Type	Base Rate	Calculation Method	Faculty Levels Exist	User ID	Activity Date
ADV Advising	500.00	Workload	<input type="checkbox"/>	JBRIGGS	14-NOV-2007
FLC1 Advising Contact (FLAC Test)	30.00	Contact Hours	<input type="checkbox"/>	KIDJOHNSO	12-JUN-2007
>> FLC2 Advising Workload (FLAC Test)	20.00	Workload	<input checked="" type="checkbox"/>	KIDJOHNSO	12-JUN-2007
FLC3 Advising Flat (FLAC Test)	40.00	Flat Rate	<input type="checkbox"/>	KIDJOHNSO	12-JUN-2007
			<input type="checkbox"/>		

Faculty Non-Instructional Level Rate

Faculty Level	Level Rate	User ID	Activity Date
ADVIS2 Advisor Level 2	27.00	APOLISKI	20-SEP-2007
ADVIS3 Advisor Level 3	25.00	APOLISKI	20-SEP-2007

Key Block

Search and select a **Term**, and **Contract Type** in the Key block.


Alternatively, click **Copy Rules** to access the Copy Rules From window where you can enter details of an existing term code *from* which rules are to be copied to the term code specified in the Key block.

Field	Description
Term	<p>Search and select a predefined term code from the Options List window for which you wish to specify base compensation rates and calculation methods for non-instructional activities on this rules form.</p> <p>Alternatively, select an existing term code for which rules have already been defined on this rule form to populate all the Key block elements automatically.</p> <p>Search Term Code Validation Form (STVTERM)</p> <p>Banner displays a description of the selected code.</p>
Contract Type	<p>Search and select a predefined contract type code from a list of valid contract types in the Options List window. Otherwise, choose an existing term code for which rules have already been defined on this rule form to populate all the Key block elements automatically.</p> <p>Search Faculty Contract Type Code Validation Form (STVFCNT)</p> <p>Banner displays a description of the selected code.</p>
Copy Rules	Select this button to access the Copy Rules From window.

Non-Instructional Rules Rate Block

A faculty member's assignments are usually a combination of instructional and non-instructional assignments. These are created and maintained in the Faculty Assignment Form (SIAASGN). In this block:

- Search and select a list of non-instructional types for the term entered in the Key block.
- Associate a Base Rate and a Calculation Method for each non-instructional type, and
- Determine if faculty levels need to exist for each Type.

Field	Description
	Copy rules from one term to the next by specifying information in the following fields.
From Term	Displays the term code from when the rules begin to be effective.
Copy	Select this button to copy the rules from one term to the next.
To Term	Displays the term code from when the rules cease to be effective.
	Specify base rates and associate calculation methods with each non-instructional activity.
Non-Instructional Type	Search and select a non-instructional activity type code for which you wish to specify a base rate and associate a calculation method on this rule form.
	Search Faculty Non-instructional Type Code Validation Form (STVNIST)
	Banner displays a description of the selected code.
	 Note Non-Instructional Activity type codes must be initially created in Banner Student. ■
Base Rate	Enter a base rate for each non-instructional activity type.

Field	Description
Calculation Method	<p>Select the calculation method that should be used to determine the initial calculation of a faculty member's compensation for each non-instructional activity from the pull-down list. Choices include:</p> <p>Contact Hours This method represents the faculty's weekly contact hours for a course. Using this method,</p> $\text{Initial Compensation} = \text{Contact Hours} \times \text{Base Rate}$ <p>Note: The Percentage of Responsibility of the faculty member is already taken into consideration in Banner Student.</p> <p>Workload The faculty member's workload is used in the calculation. In this case,</p> $\text{Initial Compensation} = \text{Workload} \times \% \text{ of Responsibility} \times \text{Base Rate}$ <p>Flat Rate A flat amount per course is determined as the compensation.</p>
Faculty Levels Exist	<p>This indicator is automatically selected if faculty levels are also considered in determining the faculty member's initial compensation. If so, enter rates for each faculty level in the following Faculty Institutional Level Rate block. This field is for display only.</p>
User ID	<p>Displays the user's Banner ID who created or updated information.</p>
Activity Date	<p>Displays the date on which the information was created or updated.</p>

Faculty Non-Instructional Level Rate Block

Enter information in this block only if you plan to have multiple **Faculty Compensation Levels** for non-instructional activities.

Specify information in this block if your institution uses other factors such as the faculty member's teaching experience, specialization, educational levels, seniority, etc. to determine the faculty member's initial compensation for non-instructional activities. A rate structure for each faculty level can be set up in this block.



Tip

To use the level rate structure to default a base rate, capture the **Faculty Level** of each faculty member on the PEAFACCT form. ■

Field	Description
Faculty Level	Search and select the faculty level for which you wish to specify rates. Search Faculty Compensation Level Code Validation Form (PTVFLCL) Banner displays a description of the selected code.
Level Rate	Enter a base rate for each faculty level.
User ID	Displays the user's Banner ID who created or updated information.
Activity Date	Displays the date on which the information was created or updated.

Copy Rules From Window

Click **Copy Rules** from the Key block of PTRNIST to access the Copy Rules From window.

Select and identify the *source* to copy rules *from* one term code and/or contract type *to* the term specified in the Key block.



Field	Description
Term	<p>Search and select a Term code from which you wish to copy rules. Banner displays a description of the selected code.</p> <p>Note: This term code is the <i>source</i> from which all rules will be copied. You can further refine the source by selecting the College, Campus, and Contract Type codes appropriately.</p>
Contract Type	<p>Search and select an existing Contract Type code which you wish to copy rules. Banner displays a description of the selected code.</p>
Process Rules	<p>Select this button to populate rules from the source Term Code, and/or Contract Type to the Term code specified in the Key block.</p>

Faculty Load Contract Type Control Rules Form (PTRFLCT)

If you plan to implement the self-service module of Faculty Load and Compensation, access this rule form to specify how faculty compensation records must be evaluated and viewed on Employee Self-Service. Using this form, you can establish the following:

- Determine the type of compensation view for the Contract Type in Employee Self-Service
- Determine if contractual or employment comments can be viewed in Employee Self-Service, and enter appropriately in the Comment block.
- Determine whether job labor distributions can be derived by the Section Labor Distribution Overrides established against the course structures in Banner Student for use by the extract process (PEPFLAC) when the job assignments and labor distributions are compiled.

Faculty Load Contract Type Control Rules PTRFLCT 8.0

Term: 200731 Fall 2006 (FLAC Tech Test)

From Term: 200701 Copy: To Term: 200741

Contract Type	Compensation View	Extract Job Effective Date	Update Job Effective Date	Use Schedule Labor Distributions	Self Service Comment	Activity Date
>> [i] Fall and Spring (FLAC Testing)	Salaried	01-JUN-2007	01-JUN-2007	<input type="checkbox"/>	<input type="checkbox"/>	24-OCT-2007
FA Fall Only (FLAC Testing)	Course	01-SEP-2006	01-SEP-2006	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10-OCT-2007
FS Fall/Spring Contract	Salaried	01-SEP-2006	01-SEP-2006	<input type="checkbox"/>	<input checked="" type="checkbox"/>	27-SEP-2007
FT Fall, Spring, Summer (FLAC)	Salaried	01-SEP-2006	01-SEP-2006	<input type="checkbox"/>	<input checked="" type="checkbox"/>	27-SEP-2007
OV Overload (FLAC Testing)	Course	01-SEP-2006	01-SEP-2006	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	27-SEP-2007
PT Part Time	Course	01-SEP-2006	20-MAY-2007	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	27-SEP-2007

Self Service Comments: [edit icon]

Key Block

Field	Description
Term	<p>Search and select a Term code from the Options List window for which you wish to set up self-service features.</p> <p>The Options List window allows you to choose a term with predefined rules or a new Term code. Existing Term codes are those for which rules have already been defined on this rule form.</p> <p>Search Term Code Validation Form (STVTERM)</p> <p>Banner displays a description of the selected code.</p>

Main Block

Field	Description
From Term	Displays the Term code from when the rules become effective.
Copy	Click Copy to copy the
To Term	Displays the Academic Term code when the rules cease to be effective. The value for this field is defaulted from the Academic Year on the Term Code Validation Form (STVTERM).
<p>Set up self-service features for each Contract Type in the following fields.</p>	
Contract Type	<p>Search and select a Contract Type code for which you wish to activate self-service features in Employee Self-Service. The Contract Type is embedded on each Faculty Assignment record (SIAASGN).</p> <p>Search Faculty Contract Type Code Validation Form (STVFCNT)</p> <p>Banner displays a description of the selected code.</p>

Field	Description
Compensation View	A faculty member's compensation and job assignments can be presented in two ways in Employee Self-Service based on the Contract Types. From the pull-down list, select the most appropriate view for each Contract Type. Choices include: <ul style="list-style-type: none"> Salaried Select this view for full-time faculty members who are paid a fixed salary for a group of assignments associated with the same Position and Suffix. Course Select this view for part-time or adjunct faculty whose instructional and non-instructional compensation is determined on a course-by-course basis.

Note: Contract Type codes must be predefined on the Faculty Assignment Form (SIAASGN) in Banner Student.

Specify correct dates in the following two fields to ensure that job assignment records are created in Banner Human Resources.

Extract Job Effective Date Enter the date that should be used by the Faculty Load and Compensation Extract Process (PEPFLAC) to view a collect faculty member's job assignment records to be evaluated for appointment or reappointment in Employee Self-Service.

This field is required only for *salaried* compensation views.

Update Job Effective Date Enter the date that should be used as the new job effective date by the Faculty Load and Compensation Extract Process (PEPFLAC) in order to create a job record in Banner Human Resources for faculty compensation. This date is required by the extract process for salaried jobs and will create a new effective dated job record on this date. It is important to specify a date at the beginning of the first contractual payment.

For adjunct faculty, this date is optional. If left blank, the system will evaluate the term and course dates and search for the start date of the next payroll to determine the effective date of the job. If entered, the process will use this date to create the effective date of the job record. This allows an institution to back-date the beginning date of the job assignment and override the term date logic. It is important to specify a date at the beginning of the first contractual payment.

Field	Description
Use Schedule Labor Distributions	<p>Select this indicator to determine the source for job labor distribution that should be used by the extract process (PEPFLAC). It is invoked only for Course-based computations.</p> <p>Two options are available. Banner Student maintains FOAPAL elements at the course level, namely the Course Reference Number (CRN), whereas Banner Human Resources maintains FOAPAL elements for each Position.</p> <ul style="list-style-type: none"> • If the FOAPAL exists for a CRN on SSADETL, and the Use Schedule Labor Distribution indicator is selected, then the extract process will use the CRN FOAPAL, and default this to the job. • If the FOAPAL exists for a CRN, and the Use Schedule Labor Distribution indicator is not selected, then extract process uses the FOAPAL elements associated with the faculty position from Banner HR. • If the FOAPAL does not exist for a CRN on SSADETL, but the Use Schedule Labor Distribution indicator is selected on this rules form, then the (PEPFLAC) extract process uses the FOAPAL elements associated with the faculty position from Banner HR.
Self-Service Comment	<p>This indicator is enabled only when self-service comments are entered below. This feature allows a faculty member to view Contract Notes on their record in Employee Self-Service.</p>
Activity Date	<p>Displays the date on which the information was added or updated.</p>
Self-Service Comments	<p>Enter comments in this free-form text field which can also be accessed via Employee Self-Service. This information will be displayed to the faculty member on the Faculty Compensation and Acknowledgement page.</p>

Changed Forms

Installation Rules Form (PTRINST)

Two new fields, **Organizational Security Hierarchy** and **Position Validation on Faculty Assignments** have been added to the Faculty window of the Installation Rules Form (PTRINST). These fields enforce security for the Faculty Load and Compensation module specifically in Employee Self-Service.

The screenshot shows the 'Installation Rules PTRINST 8.0' window with the 'Faculty' tab selected. The window contains the following sections and options:

- Faculty Action Rules**
 - This Institution Will Track Faculty Actions By: Faculty Member
 - Allow the Insertion of a Faculty Action Effective Dated prior to Existing Faculty Action Records: Allowed Not Allowed
 - Edit employee job records against Faculty Leave Records: Edit Do Not Edit
- Auto Approval**
 - Rank Approval Level Code: RANK Auto Rank Approval
 - Tenure Approval Level Code: TENURE Auto Tenure Approval
 - Leave Approval Level Code: SUPER Superuser
- Faculty Load and Compensation**
 - Organizational Security Hierarchy
 - Position Validation on Faculty Assignments

Field	Description
Organizational Security Hierarchy	Select this indicator to establish position organization-based security for the Faculty Load and Compensation module in Employee Self-Service. This allows the Banner Finance hierarchy to be used for user access and control.
Position Validation on Faculty Assignments	<p>Select this indicator to ensure that all positions associated with a faculty member's instructional and non-instructional assignments are valid and can be extracted by PEPFLEC. Otherwise, faculty assignments may not be correctly updated to Banner Human Resources from Employee Self-Service.</p> <p>This indicator is used to validate the Position Number when entering data on the Faculty Assignment Form (SIAASGN) and should be turned on for use with this module</p>

 **Warning**

Do not check this indicator if you don't plan to use the faculty load and compensation module for planning salaries. ■

Note: If you wish to make changes to faculty assignments in a past term, first uncheck this indicator, make the necessary changes, and then reset this indicator to a checked status.

By un-checking the indicator initially, you ensure that the validation process does not generate any errors for faculty assignment records on SIAASGN that have invalid Position numbers, and by resetting the indicator, you ensure that Position numbers are validated going forward.

User Codes Rules Form (PTRUSER)

The User Codes Rule Form establishes User IDs for security purposes. It enables you to define the maximum salary level that can be viewed by specified users and to assign access privileges for organizations and/or Employee Classes.

A new security level, **Faculty Compensation Master Organization**, has been added specifically for access to the Faculty Load and Compensation module in Employee Self-Service.

The screenshot displays the 'User Codes Rules PTRUSER 8.0' window. It contains three rows of user information. The first row is populated with the following data:

- Code:** JBRIGGS
- Name:** Jon Briggs
- Title:** (empty)
- Permissions:** Time Entry Approvals Superuser, Leave Report Approvals Superuser, Benefit Administrator
- Maximum Salary Level:** 999,999,999.99
- Salary Planner Master Organization:** Update
- Faculty Compensation Master Organization:** Update
- Activity Date:** 18-SEP-2007
- Master Status:** Master Employer, Master Organization, Master Employee Class

The second and third rows are empty, showing the default state of the form fields.

Field	Description
Faculty Compensation Master Organization	<p>Select this indicator to set up organization security and access levels to the self-service pages of the Faculty Load and Compensation module in Employee Self-Service for each Banner user ID.</p> <p>Users can be set up with three types of access. Choices include:</p> <p><i>Update</i> Provides Master update access to all records</p> <p><i>Query</i> Provides Master query access to all records</p> <p><i>None</i> No Access. This is the default. Set up access to specific organizations on the Organizational Hierarchy Security Form (NSASPSC).</p> <p>Note: In addition to the above field, also set up the Master Employer, Master Employee Class and Salary Level security as required. You can specify unlimited salary level access by entering a limit of 999,999,999.99. This is existing Banner HR functionality. These security features apply to the Faculty Load and Compensation module as well as all other modules of Banner Human Resources.</p> <p>A new script has been provided to update this field with a value of <i>None</i> for all existing records. Refer to the Technical section for more details.</p>

Organizational Hierarchy Security Form (NSASPSC) (Banner® Finance Installed)

The Salary Planner Security Form (NSASPSC) has been renamed as Organizational Hierarchy Security Form (NSASPSC) since the functionality has now been extended to support Faculty Load and Compensation. Consequently, a new field, **Module**, has been added to the form to identify which system is being used for the data on this form. This type of security is optional for the application.

Access the Organizational Hierarchy Security Form (NSASPSC) to set up organization security for all users of the Faculty Load and Compensation module who have been given either *Query* or *None* access in the User Codes Rule Form (PTRUSER). In other words, set up organization security for those users who have *not* been given Master *Update* or *Query* access for **Faculty Compensation Master Organization** on the User Codes Rule Form (PTRUSER).

Note

Similarly, use the same form to set up organization security for users of the Salary Planner (available in Employee Self-Service) who have been given *None* access in the User Codes Rule Form (PTRUSER). ■

Access the Organizational Hierarchy Security Form (NSASPSC) to:

- Copy organization security for a user from one module to another, i.e., from the Faculty Load and Compensation to the Salary Planner, and vice-versa.
- Copy organization security from one user to another within a single Chart of Accounts (COA) code, and
- Define update or query access to organizations.

The Organizational Hierarchy Security Form (NSASPSC) gives you greater control in determining access to data as you can not only specify individual access to organizations, but also specify a group of organizations using Banner Finance hierarchy processing.

 **Note**

NSASPSC only affects organization security within the Faculty Load and Compensation module in Banner and the Salary Planner in Employee Self-Service enhancements, and does *not* affect other Banner HR security. ■

The Organizational Hierarchy Security Form (NSASPSC) consists of a:

- Key Block
- Main Block
- Copy User to New Module Window
- Delete New User Window

 **Tip**

All windows of this form can be accessed only from the Key block. ■

Key Block

In the Key block, select a Banner user for whom you wish to establish organization security access within a Banner module. A new field, **Module**, has been added to this block.

Field	Description
Module	From the pull-down list, select the Banner module to establish organization security and access for a user. Choices include: <i>Faculty Compensation</i> <i>Salary Planner</i>

Existing fields, **Include Organization** and **Exclude Organization** have been moved to the Delete New User window.

Main Block

The Main block has been modified to specify the module to which the security applies, Faculty Compensation or Salary Planner.

Copy User to New Module Window

Access the Copy User to New Module window to copy a user's organization-level security from the module selected in this window to the module selected in the Key block. Access this window from the Key block by selecting *Copy to New User* from the Options menu.



Tip

In the Key block, select the destination module for which organization access is to be established. ■

Field	Description
From Module	From the pull-down list, select the module from which the organization security should be copied from. This will be the source module.
Process Copy	Select this button to save and process the information entered in this window. A list of organization codes will be copied to the module selected in the Key block of the form.

Example

Copy the organization-level security specified for John Smith from the Salary Planner module to the Faculty Compensation module.

Delete New User Window

Access the Delete New User window to remove users with specific organization-level security from accessing the Faculty Compensation or the Salary Planner applications. Access this window by selecting *Delete Organization by Group* from the Options menu of the Key block.

Field	Description
Include Organization	Search and select, or enter an existing organization code to set up secure access to specific organizations.
	Search Organization Code Validation Form - Finance (FTVORGN) when <i>Banner Finance</i> is installed.
	Search Organization Code Validation Form (PTVORGN) when <i>Banner Finance</i> is <i>not</i> installed.
	All organization codes will be copied if this field is blank.
Exclude Organization	Search and select, or enter an existing organization code to limit access to specific organizations.
	Search Organization Code Validation Form - Finance (FTVORGN) when <i>Banner Finance</i> is installed.
	Search Organization Code Validation Form (PTVORGN) when <i>Banner Finance</i> is <i>not</i> installed.
	Note: If this field is blank, it does <i>not</i> imply all organization codes are excluded for the user.
Process Delete	Select this button to save and process any changes made in this window.

Example

Remove Jane Smith listed with *Query* only access on this form when you promote her access level to *Update* on the User Codes Rules Form (PTRUSER).

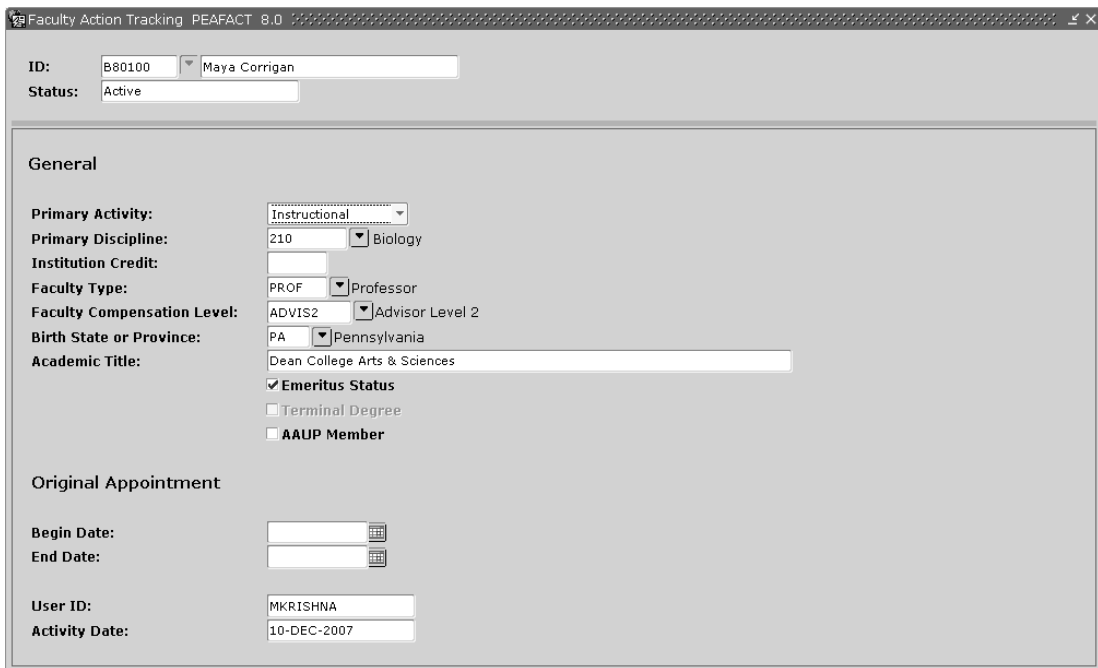
Faculty Action Tracking Form (PEAFACT)

A new optional field, **Faculty Compensation Level**, has been added to the General block of the Faculty Action Tracking Form (PEAFACT) to capture a faculty member's compensation level.

This field is used in determining the faculty member's base compensation package for course-calculated assignments, if your organization uses other associated factors such as the faculty's seniority, teaching experience, rank, cumulative credit hours etc.

Note

This information will have to manually entered and maintained for each individual when using levels on PTRFLAC and PTRNIST, for instructional and non-instructional assignments, respectively. ■



Faculty Action Tracking PEAFACT 8.0

ID: B80100 Maya Corrigan

Status: Active

General

Primary Activity: Instructional

Primary Discipline: 210 Biology

Institution Credit:

Faculty Type: PROF Professor

Faculty Compensation Level: ADVIS2 Advisor Level 2

Birth State or Province: PA Pennsylvania

Academic Title: Dean College Arts & Sciences

Emeritus Status

Terminal Degree

AAUP Member

Original Appointment

Begin Date:

End Date:

User ID: MKRISHNA

Activity Date: 10-DEC-2007

New Processes

Faculty Load and Compensation Extract Process (PEPFLAC)

Description The Faculty Load and Compensation Extract Process (PEPFLAC)

1. Extracts faculty assignments from Banner Student
2. Applies compensation calculation rules as defined by your institution in Banner Human Resources on the extracted data
3. Prepares the extracted data for viewing on appropriate self-service pages in Employee Self-Service. Self-service users such as Faculty Administrators can work to modify the extracted information in Employee Self-Service to create comprehensive compensation pay packages for their faculty members.



Note

The Faculty Load and Compensation Extract Process (PEPFLAC) extracts only those faculty assignments that are associated with Positions with **Position Status** either *Active* or *Frozen* (on the Position Definition Form (NBAPOSN), with a **Position Budget Status** that is *Approved* (on the Position Budget Form (NBAPBUD)). Additionally, the faculty member must have a non-terminated Employee record in Banner Human Resources to be included. ■

The extract process can be run in the following modes:

- | | |
|-------------------|--|
| <i>Initial</i> | Extracts faculty data from Banner Student and Human Resources for the first time. |
| <i>Recreate</i> | The process selects faculty from Banner Student assignments on SIAASGN for a specified Term Code, and replaces or restarts all records associated with each faculty member in Employee Self-Service. |
| <i>Add/Delete</i> | The process updates only existing records in the previously extracted faculty load and compensation data by comparing faculty assignment data on Employee Self-Service with those in Banner Student for each faculty member: <ul style="list-style-type: none">• The process <i>adds</i> records if any instructional or non-instructional assignments are present in Banner Student but not in Employee Self-Service.• The process <i>deletes</i> records if any instructional or non-instructional assignments are present in Employee Self-Service, but not in Banner Student. |

Example:

Adding or deleting course assignments, course information, or schedule information in Banner Student.

Processing Notes for Salaried Employees

For salaried employees, the Faculty Load and Compensation Extract Process (PEPFLAC) uses the Payroll Calendar and the **Update Job Effective Date** field on PTRFLCT to determine the Start and End Dates of a job assignment, and the Job Effective Date as follows:

1. The Payroll Calendar for the faculty member is determined from the Pay ID associated with the Position's Employee Class, and the **Update Job Effective Date** on PTRFLCT is used as the Job Effective Date.
2. From the Payroll Calendar (Step 1), the process then determines the Pay Period Start Date as the date that is less than or equal to the Update Job Effective Date. An End Date is optional.

Processing Notes for Course-Compensated Employees

For employees compensated on a course-by-course basis, the process extracts and stores the Start and End Dates for each *course*. The Update Job Effective Date on PTRFLCT is optional for this group of employees. If it is populated, the Extract process, PEPFLAC, will physically use this date as the Effective Date of the job. So, it is important that the date be set to the Payroll Start Date to affect the first payment. If the date is not entered on PTRFLCT, the Effective Date of the job will be determined by the following procedure:

1. The process determines the payroll calendar for the faculty member from the Pay ID associated with the Position's Employee Class.
2. The process selects that Pay Period Start Date which is greater than or equal to the Term or Course Start Date.
3. To determine the Job Begin Date, the process compares the Course Start Date and the Update Job Effective Date on PTRFLCT. If the Course Start Date is less than or equal to the Update Job Effective Date, the latter is used as the Job Begin Date. Otherwise the Course Start Date is used as the Job Begin Date.
4. To determine the Job End Date, the process finds the Pay Period End Date that is greater than or equal to the stored Course End Date.

The process also counts the number of pay periods associated with the duration of the job assignment. This is used to determine the Factor and Pays for the job assignment.

Example

A Fall Term would consist of four pay periods. Consequently, the **Factor** and **Pays** will be set to 4.

Labor Distributions Relating to Multi-Year Encumbrance (MYE) Processing

The new Multiple Year Encumbrance enhancement has the ability to specify an **Encumbrance Override End Date**, that is accessible only on the Job Labor Distribution record in Banner Human Resources. The Faculty Load and Compensation (FLAC) module allows an institution to reappoint faculty members to the same Position and Suffix and as a result, carry forward the current Job Labor Distribution records. If the current job and labor records are extracted into the FLAC module, the system will carry forward any previously entered Encumbrance Override Date on FOAPAL components that contain an applicable Fund Code. This information is not accessible within the FLAC module for view or update. Therefore any update to a FOAPAL record will not affect this date, unless you remove the record.

Additionally, if a new Job Labor Distribution is added in FLAC that contains a Fund code which is designated for multiple year encumbering, the **Encumbrance Override End Date** cannot be entered in FLAC on the Job Labor Distribution page. You will need to first upload the faculty assignment to NBAJOBS, through the Faculty Upload Process (PEPFCAP) and then update the record on NBAJOBS, if necessary.

Parameters	Name	Description/Values	Required?	Default	Validation
01	Term Code	Term Code as established in Banner Student.	Yes	None	STVTERM
02	Part of Term	Part of Term as established in Banner Student.	No	None	STVPTRM
03	Process Mode	Indicate the run mode of the extract process. Choices include: <i>Initial (I)</i> - Extracts faculty data from Banner Student and HR systems for the first time. <i>Recreate (R)</i> - Based on the run criteria, replaces only the previously extracted data with new extracted information for a specified Term Code. <i>Add/Delete (A)</i> - Compares faculty assignment data on Employee Self-Service with those in Banner Student to make appropriate changes for only those records as per Banner Student.	Yes	<i>Initial (I)</i>	None
04	Contract Type	The Contract Type Code associated with a faculty member in Banner Student. For example, <i>FS</i> - Fall/Spring Contract, <i>S</i> - Summer Contract.	No	None	STVFCNT

Parameters	Name	Description/Values	Required?	Default	Validation
05	Employee Class	The Employee Class associated with a Position ID in Banner Human Resources.	No	None	PTRECLS
06	Process Individual ID	Indicate if a specific employee ID is to be extracted from Banner. Choices includes: Yes - Process an individual employee ID. No - Do not process an individual employee ID.	Yes	<i>No (N)</i>	None
07	Identification Number	Enter the employee's ID if you indicated <i>Yes</i> to process an individual ID for parameter 06 above.	No.	None	None
08	Job Change Reason	The reason for a change in a faculty member's job assignment.	Yes	None	PTRJCRE
09	Use Population Selection	Indicate if the data must be extracted from a pre-defined subset or population of faculty members. Choices include: Yes - Use population selection No - Do not use population selection.	No	No (N)	None
10	Population Selection ID	Identify the population to be used by the extract process. Specify this parameter only if you set the Use Population Selection parameter to <i>Y</i> .	No	None	GIRSLCT
11	Creator ID	Creator ID for population selection. Enter this parameter only if you set the Use Population Selection parameter to <i>Y</i> .	No	None	GURIDEN
12	Application ID	Application ID for population selection. Enter this parameter only if you set the Use Population Selection parameter to <i>Y</i> .	No	None	GLRAPPL

Frequency

On Demand

Sort Order

First by Last Name, then First Name, Middle Initial, and ID.

Data Source

For Rule Forms and Validation Forms

PTVFLIC	PTVFLCL	PTRFLIC	PTRSCHD	PTRSCLV	PTRNIST
PTRNILV	PTRCALN	PTRECLS	STVTERM	STVFCNT	STVSCHD

For Faculty and Employee Records

SPRIDEN	SIBINST	PEBEMPL	PERBFAC
---------	---------	---------	---------

Instructional Assignments

SCBCRSE	SSBSECT	SIRASGN	SSRMEET	SCRSCHD
---------	---------	---------	---------	---------

For Non-Instructional Assignments

SIRNIST

For Jobs

NBBPOSN	NBRBJOB	NBRJOBS
---------	---------	---------

For Default Earnings

NBREARN

For Labor Distributions

NBRPLBD	NBRJLBD	SCRSCLD
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Report Format

Standard, horizontal

Report Sample—Faculty Load and Compensation Extract Process (PEPFLAC)

PAGE 1
PEPFLAC 8.0

Banner University
Faculty Load Extract Process
Extract and Error Audit Section

RUN DATE 21-FEB-2008
RUN TIME 10:15 AM

Term: 200951 Fall 2009 (FLAC)

Name	Message	Position	CRN-Session	Subject and Course	Section	Faculty Level
Lindstrom, Kelly						ADMIN Administrator Teaching
	ID: FLAC11111					
	Error: Missing Position and Suffix on Faculty Assignment. Non-Instructional Type ADV.					
	-----Instructional-----					
	FAC002-01	5001-01	EDUC 105	Human Development	0	
	FAC002-00	5002-01	COM 100	Mass Media in Society	0	
	FAC002-02	5005-01	EDUC 105	Human Development	1	
	-----Non-Instructional-----					
	ADV	Advising				
Moore, Lenore						ASSIST Assistant Prof
	ID: A00013107					
	Warning: Schedule Labor Distribution cannot be computed for this Job FAC002-01. Check calculation method. Position or Job Labor Distribution is defaulted.					
	-----Instructional-----					
	FAC002-01	5004-01	ENGL 300	English Composition I	0	
	FAC002-00	5006-01	COM 100	Mass Media in Society	1	
	-----Non-Instructional-----					
Smith, Jeanette						INST Instructor
	ID: A00013105					
	Warning: Schedule Labor Distribution cannot be computed for this Job FAC002-01. Check calculation method. Position or Job Labor Distribution is defaulted.					
	-----Instructional-----					
	FAC002-00	5001-01	EDUC 105	Human Development	0	
	FAC002-01	5003-01	HIST 150	World History 1700 to Present	0	
	FAC002-02	5007-01	HIST 150	World History 1700 to Present	1	
	FAC002-03	5009-01	COM 100	Mass Media in Society	0	
	-----Non-Instructional-----					
Walsh, Victoria						
	ID: A00013106					
	-----Instructional-----					
	F00017-00	5001-01	EDUC 105	Human Development	0	
	F00017-00	5002-01	COM 100	Mass Media in Society	0	
	F00017-00	5003-01	HIST 150	World History 1700 to Present	0	
	F00017-00	5004-01	ENGL 300	English Composition I	0	
	F00017-00	5008-01	ENGL 300	English Composition I	1	
	-----Non-Instructional-----					
	F00017-00	CHR	Department Chairman			

*** REPORT CONTROL INFORMATION ***
Parameters have been entered via Job Submission.

Parameter Name	Value
Parameter Seq No:	35464
Term Code:	200951
Part of Term:	
Process Mode:	R
Contract Type:	
Employee Class:	
Process Individual ID:	N
Identification Number:	
Job Change Reason:	FLAC
Use Population Selection:	N
Population Selection ID:	
Creator ID:	
Application ID:	
Employees Extracted:	4
Instructional Assignments Extracted:	14
Non-Instructional Assignments Extracted:	1
Job Assignments Extracted:	10
Deleted Assignments:	0
Compensation:	16,886.25
Number of Errors Issued:	1

Faculty Compensation Upload Process (PEPFCAP)

Description The Faculty Compensation Upload Process (PEPFCAP) evaluates all job records that are created by the Faculty Load and Compensation module in Employee Self-Service and applies the data to Banner Human Resources.

Pre-requisite

Lock the faculty compensation records in Employee Self-Service before running the upload process. This indicates that the record has been reviewed and completed by a faculty administrator.

Processing Notes

The Faculty Compensation Upload Process (PEPFCAP) can be run in two modes:

Edit The process checks for errors and provides a detailed report of all the records that can be applied, without making any changes to the database. The process can be run multiple times in the Edit mode using the same set of locked records.

Update The process edits and directly applies changes to the database.
On completion, the status of the faculty compensation records in Employee Self-Service changes to *Applied*. The records can no longer be reset or unlocked in Employee Self-Service. Any further changes to applied records will have to be directly performed in Banner Human Resources.



Tip

Run the process in the *Edit* mode and check for errors before running the process in the *Update* mode. ■

The upload processes in both AFLAC and Salary Planner need to document how the new uploaded records could affect the Encumbrance Override End Date on the new job record.

Parameters	Name	Description/Values	Required	Default	Validation
01	Term Code	The Term Code from Banner Student.	Yes	None	STVTERM
02	Process Code	Select the process run mode from the following: Edit (E)-The process performs error checks, produces a detailed report of all records processed without making any changes to the database. Update (U)-The process applies all changes made to the job assignment records, and makes changes to the database.	Yes	Edit	None
03	Contract Type	Specify the Faculty Member Contract Type code.	No	None	STVFCNT
04	Suppress Warning Messages	Indicate if the process should suppress warning messages. Choices include: Yes - Process suppresses warning messages. No - Process does not suppress warning messages.	Yes	No (N)	None
05	Process Acknowledged Only	Indicate if the process should only process compensation records that have been Acknowledged by faculty members. Choices include: Yes Process only Acknowledged records. No Process any record in a locked status.	Yes	No (N)	None

Frequency

On Demand

Sort Order

First by Last Name, then by First Name, Middle Initial, ID, Job Contract Type (Primary, then Secondary), and Position Number

Data Source

PERFCNT	PERFJOB	NBRBJOB	NBRJOBS
PERFJER	NBREARN		
PERFJLD	NBRJLBD		

Report Format

Standard horizontal report format

Report Sample—Faculty Compensation Upload Process (PEPFCAP)

PAGE 1
PEPFCAP 8.0

SUNGARDHE University
Faculty Compensation Upload
Employee Job Apply

RUN DATE 03-DEC-2007
RUN TIME 10:49 AM

Term: 200741 Fall 2006 (FLAC Func Testing)

ID NAME
FLACC0048 Smythe, Justin

POSITION FLAC11-01	Faculty Full time	JOB TYPE Primary	ORGANIZATION 11009 Dept of Physical Sciences	CONTRACT FA	JOB CHANGE REASON CTEST Faculty Compensation
-----------------------	-------------------	---------------------	---	----------------	---

EFFECTIVE DATE	JOB END	JOB FTE	APPT %	HOURS /DAY	HOURS /PAY	-----SALARY----- GROUP TABLE GRADE STEP	NUMBER PAY	HOURLY RATE	PER PAY SALARY	ANNUAL SALARY	DEFER PAY
15-SEP-06	14-JAN-07	1.000	100.00	1.00	2.00	2006 FA 02 0	4.0	103.125000	206.25	825.00	

EARNINGS REG Regular Pay	HRS/UNITS 2.00	DEEMED HOURS	SPECIAL RATE	SHIFT	END DATE
				1	

INDEX	FUND	ORGN	ACCT	PROG	ACTV	LOCN	PERCENT
	8122	11009	6121	40			100.00

POSITION FLAC11-02	Faculty Full time	JOB TYPE Secondary	ORGANIZATION 11009 Dept of Physical Sciences	CONTRACT FA	JOB CHANGE REASON CTEST Faculty Compensation
-----------------------	-------------------	-----------------------	---	----------------	---

EFFECTIVE DATE	JOB END	JOB FTE	APPT %	HOURS /DAY	HOURS /PAY	-----SALARY----- GROUP TABLE GRADE STEP	NUMBER PAY	HOURLY RATE	PER PAY SALARY	ANNUAL SALARY	DEFER PAY
15-SEP-06	14-JAN-07	1.000	100.00	1.00	2.00	2006 FA 02 0	4.0	31.250000	62.50	250.00	

EARNINGS REG Regular Pay	HRS/UNITS 2.00	DEEMED HOURS	SPECIAL RATE	SHIFT	END DATE
				1	

INDEX	FUND	ORGN	ACCT	PROG	ACTV	LOCN	PERCENT
	8122	11009	6121	40			100.00

* * * REPORT CONTROL INFORMATION * * *
Parameters have been entered via Job Submission.

Total Job Assignments Selected:	2
Total Job Assignments With Errors:	0
Total Job Assignments Updated:	2
Total Updated Job Salaries:	1,075.00
Total CRN, NIST References:	2

*** Note! Jobs Not Updated. Mode = Edit ***

Parameter Name	Value
Parameter Seq No:	157395
Term Code:	200741
Process Mode:	E
Contract Type:	
Suppress Warnings:	N



2 Faculty Load and Compensation-Technical



This section documents the technical changes made to Banner Human Resources and Position Control for the Faculty Load and Compensation module.

New Tables

The following new tables have been added to the database.

PTVFLIC

Database Column	Null?	Data Type
PTVFLIC_CODE	NOT NULL	VARCHAR2(8 CHAR)
PTVFLIC_DESC	NOT NULL	VARCHAR2(30 CHAR)
PTVFLIC_ACTIVITY_DATE	NOT NULL	DATE
PTVFLIC_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PTVFLIC_DATA_ORIGIN		VARCHAR2(30 CHAR)

PTRFLIC

Database Column	Null?	Data Type
PTRFLIC_TERM_CODE_EFF	NOT NULL	VARCHAR2(6 CHAR)
PTRFLIC_FLIC_CODE	NOT NULL	VARCHAR2(8 CHAR)
PTRFLIC_CALC_METHOD	NOT NULL	VARCHAR2(1 CHAR)
PTRFLIC_ACTIVITY_DATE	NOT NULL	DATE
PTRFLIC_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PTRFLIC_DATA_ORIGIN		VARCHAR2(30 CHAR)

Database Column	Null?	Data Type
PTRFLIC_RATE		NUMBER(9,2)
PTRFLIC_CRSE_CALC_PERCENT		NUMBER(5,2)

PTVFLCL

Database Column	Null?	Data Type
PTVFLCL_CODE	NOT NULL	VARCHAR2(6)
PTVFLCL_DESC	NOT NULL	VARCHAR2(30)
PTVFLCL_ACTIVITY_DATE	NOT NULL	DATE
PTVFLCL_USER_ID	NOT NULL	VARCHAR2(30)
PTVFLCL_DATA_ORIGIN		VARCHAR2(30)

PTRSCHD

Database Column	Null?	Data Type
PTRSCHD_TERM_CODE_EFF	NOT NULL	VARCHAR2(6 CHAR)
PTRSCHD_CAMP_CODE	NOT NULL	VARCHAR2(3 CHAR)
PTRSCHD_COLL_CODE	NOT NULL	VARCHAR2(2 CHAR)
PTRSCHD_FCNT_CODE	NOT NULL	VARCHAR2(2 CHAR)
PTRSCHD_SCHD_CODE	NOT NULL	VARCHAR2(3 CHAR)
PTRSCHD_RATE	NOT NULL	NUMBER(9,2)
PTRSCHD_CALC_METHOD	NOT NULL	VARCHAR2(1 CHAR)
PTRSCHD_ACTIVITY_DATE	NOT NULL	DATE
PTRSCHD_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PTRSCHD_DATA_ORIGIN		VARCHAR2(30 CHAR)

PTRSCLV

Database Column	Null?	Data Type
PTRSCLV_TERM_CODE_EFF	NOT NULL	VARCHAR2(6 CHAR)
PTRSCLV_CAMP_CODE	NOT NULL	VARCHAR2(3 CHAR)
PTRSCLV_COLL_CODE	NOT NULL	VARCHAR2(2 CHAR)
PTRSCLV_FCNT_CODE	NOT NULL	VARCHAR2(2 CHAR)
PTRSCLV_SCHD_CODE	NOT NULL	VARCHAR2(3 CHAR)
PTRSCLV_FLCL_CODE	NOT NULL	VARCHAR2(6 CHAR)
PTRSCLV_RATE	NOT NULL	NUMBER(9,2)
PTRSCLV_ACTIVITY_DATE	NOT NULL	DATE
PTRSCLV_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PTRSCLV_DATA_ORIGIN		VARCHAR2(30 CHAR)

PTRNIST

Database Column	Null?	Data Type
PTRNIST_TERM_CODE_EFF	NOT NULL	VARCHAR2(6 CHAR)
PTRNIST_FCNT_CODE	NOT NULL	VARCHAR2(2 CHAR)
PTRNIST_NIST_CODE	NOT NULL	VARCHAR2(4 CHAR)
PTRNIST_RATE	NOT NULL	NUMBER(9,2)
PTRNIST_CALC_METHOD	NOT NULL	VARCHAR2(1 CHAR)
PTRNIST_ACTIVITY_DATE	NOT NULL	DATE
PTRNIST_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PTRNIST_DATA_ORIGIN		VARCHAR2(30 CHAR)

PTRNILV

Database Column	Null?	Data Type
PTRNILV_TERM_CODE_EFF	NOT NULL	VARCHAR2(6 CHAR)
PTRNILV_FCNT_CODE	NOT NULL	VARCHAR2(2 CHAR)

Database Column	Null?	Data Type
PTRNILV_NIST_CODE	NOT NULL	VARCHAR2(4 CHAR)
PTRNILV_FLCL_CODE	NOT NULL	VARCHAR2(6 CHAR)
PTRNILV_RATE	NOT NULL	NUMBER(9,2)
PTRNILV_ACTIVITY_DATE	NOT NULL	DATE
PTRNILV_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PTRNILV_DATA_ORIGIN		VARCHAR2(30 CHAR)

PTRFLCT

Database Column	Null?	Data Type
PTRFLCT_TERM_CODE_EFF	NOT NULL	VARCHAR2(6 CHAR)
PTRFLCT_FCNT_CODE	NOT NULL	VARCHAR2(2 CHAR)
PTRFLCT_COMP_VIEW_IND	NOT NULL	VARCHAR2(1 CHAR)
PTRFLCT_CRN_LABOR_DIST_IND	NOT NULL	VARCHAR2(1 CHAR)
PTRFLCT_EXTR_JOBS_EFF_DATE	NOT NULL	DATE
PTRFLCT_JOB_EFFECTIVE_DATE	NOT NULL	DATE
PTRFLCT_ACTIVITY_DATE	NOT NULL	DATE
PTRFLCT_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PTRFLCT_DATA_ORIGIN		VARCHAR2(30 CHAR)
PTRFLCT_COMMENTS		VARCHAR2(4000 CHAR)

PERFASG

Database Column	Null?	Data Type
PERFASG_TERM_CODE	NOT NULL	VARCHAR2(6 CHAR)
PERFASG_PIDM	NOT NULL	NUMBER(8)
PERFASG_CRN	NOT NULL	VARCHAR2(5 CHAR)
PERFASG_CATEGORY	NOT NULL	VARCHAR2(2 CHAR)
PERFASG_CAMP_CODE	NOT NULL	VARCHAR2(3 CHAR)

Database Column	Null?	Data Type
PERFASG_COLL_CODE	NOT NULL	VARCHAR2(2 CHAR)
PERFASG_FCNT_CODE	NOT NULL	VARCHAR2(2 CHAR)
PERFASG_POSN	NOT NULL	VARCHAR2(6 CHAR)
PERFASG_SUFF	NOT NULL	VARCHAR2(2 CHAR)
PERFASG_JOB_EFFECTIVE_DATE	NOT NULL	DATE
PERFASG_PERCENT_RESPONSE	NOT NULL	NUMBER(3)
PERFASG_PERCENT_SESS	NOT NULL	NUMBER(3)
PERFASG_TOTAL_CREDIT_HR_SESS	NOT NULL	NUMBER(7,3)
PERFASG_TOTAL_HRS_WEEK	NOT NULL	NUMBER(5,2)
PERFASG_WORKLOAD	NOT NULL	NUMBER(9,3)
PERFASG_ENRL	NOT NULL	NUMBER(4)
PERFASG_ACTIVITY_DATE	NOT NULL	DATE
PERFASG_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PERFASG_DATA_ORIGIN		VARCHAR2(30 CHAR)
PERFASG_PTRM_CODE		VARCHAR2(3 CHAR)
PERFASG_REVISSED_CREDIT_HRS		NUMBER(7,3)
PERFASG_REVISSED_HRS_WEEK		NUMBER(5,2)
PERFASG_REVISSED_WORKLOAD		NUMBER(9,3)
PERFASG_REVISSED_ENRL		NUMBER(4)
PERFASG_WORKLOAD_INCR		NUMBER(9,3)

PERFCSC

Database Column	Null?	Data Type
PERFCSC_TERM_CODE	NOT NULL	VARCHAR2(6 CHAR)
PERFCSC_PIDM	NOT NULL	NUMBER(8)
PERFCSC_CRN	NOT NULL	VARCHAR2(5 CHAR)
PERFCSC_CATEGORY	NOT NULL	VARCHAR2(2 CHAR)

Database Column	Null?	Data Type
PERFCSC_SCHD_CODE	NOT NULL	VARCHAR2(3 CHAR)
PERFCSC_RATE	NOT NULL	NUMBER(9,2)
PERFCSC_CALC_METHOD	NOT NULL	VARCHAR2(1 CHAR)
PERFCSC_ACTIVITY_DATE	NOT NULL	DATE
PERFCSC_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PERFCSC_DATA_ORIGIN		VARCHAR2(30 CHAR)
PERFCSC_FLCL_CODE		VARCHAR2(6 CHAR)
PERFCSC_CREDIT_HRS_SESS		NUMBER(7,3)
PERFCSC_HRS_WEEK		NUMBER(5,2)
PERFCSC_COMPENSATION_AMOUNT		NUMBER(11,2)

PERFCIN

Database Column	Null?	Data Type
PERFCIN_TERM_CODE	NOT NULL	VARCHAR2(6 CHAR)
PERFCIN_PIDM	NOT NULL	NUMBER(8)
PERFCIN_CRN	NOT NULL	VARCHAR2(5 CHAR)
PERFCIN_CATEGORY	NOT NULL	VARCHAR2(2 CHAR)
PERFCIN_FLIC_CODE	NOT NULL	VARCHAR2(8 CHAR)
PERFCIN_CALC_METHOD	NOT NULL	VARCHAR2(1 CHAR)
PERFCIN_ACTIVITY_DATE	NOT NULL	DATE
PERFCIN_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PERFCIN_DATA_ORIGIN		VARCHAR2(30 CHAR)
PERFCIN_RATE		NUMBER(9,2)
PERFCIN_CRSE_CALC_PERCENT		NUMBER(5,2)
PERFCIN_COMP_CREDIT_HRS		NUMBER(7,3)
PERFCIN_COMP_HRS_WEEK		NUMBER(5,2)
PERFCIN_COMP_ENRL		NUMBER(4)

Database Column	Null?	Data Type
PERFCIN_COMP_WORK_LOAD		NUMBER(9,3)
PERFCIN_COMPENSATION_AMOUNT		NUMBER(11,2)

PERFNIS

Database Column	Null?	Data Type
PERFNIS_TERM_CODE	NOT NULL	VARCHAR2(6 CHAR)
PERFNIS_PIDM	NOT NULL	NUMBER(8)
PERFNIS_SEQ_NO	NOT NULL	NUMBER(6)
PERFNIS_NIST_CODE	NOT NULL	VARCHAR2(4 CHAR)
PERFNIS_POSN	NOT NULL	VARCHAR2(6 CHAR)
PERFNIS_SUFF	NOT NULL	VARCHAR2(2 CHAR)
PERFNIS_JOB_EFFECTIVE_DATE	NOT NULL	DATE
PERFNIS_FCNT_CODE	NOT NULL	VARCHAR2(2 CHAR)
PERFNIS_ACTIVITY_DATE	NOT NULL	DATE
PERFNIS_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PERFNIS_DATA_ORIGIN		VARCHAR2(30 CHAR)
PERFNIS_COLL_CODE		VARCHAR2(2 CHAR)
PERFNIS_DEPT_CODE		VARCHAR2(4 CHAR)
PERFNIS_FLCL_CODE		VARCHAR2(6 CHAR)
PERFNIS_NIST_WORK_LOAD		NUMBER(9,3)
PERFNIS_WEEKLY_HRS		NUMBER(9,3)
PERFNIS_RATE		NUMBER(9,2)
PERFNIS_CALC_METHOD		VARCHAR2(1)
PERFNIS_COMPENSATION_AMOUNT		NUMBER(11,2)
PERFNIS_REVISIED_NIST_WORK_LOAD		NUMBER(9,3)
PERFNIS_REVISIED_WEEKLY_HRS		NUMBER(9,3)

PERFJOB

Database Column	Null?	Data Type
PERFJOB_TERM_CODE	NOT NULL	VARCHAR2(6 CHAR)
PERFJOB_PIDM	NOT NULL	NUMBER(8)
PERFJOB_POSN	NOT NULL	VARCHAR2(6 CHAR)
PERFJOB_SUFF	NOT NULL	VARCHAR2(2 CHAR)
PERFJOB_EFFECTIVE_DATE	NOT NULL	DATE
PERFJOB_PERS_CHG_DATE	NOT NULL	DATE
PERFJOB_BEGIN_DATE	NOT NULL	DATE
PERFJOB_JCRE_CODE	NOT NULL	VARCHAR2(5 CHAR)
PERFJOB_CONTRACT_TYPE	NOT NULL	VARCHAR2(1 CHAR)
PERFJOB_LOCK_IND	NOT NULL	VARCHAR2(1 CHAR)
PERFJOB_ACKNOWLEDGE_IND	NOT NULL	VARCHAR2(1 CHAR)
PERFJOB_APPLY_IND	NOT NULL	VARCHAR2(1 CHAR)
PERFJOB_ORGN_CODE_POSN	NOT NULL	VARCHAR2(6 CHAR)
PERFJOB_ECLS_CODE	NOT NULL	VARCHAR2(2 CHAR)
PERFJOB_PICT_CODE	NOT NULL	VARCHAR2(2 CHAR)
PERFJOB_SGRP_CODE	NOT NULL	VARCHAR2(6 CHAR)
PERFJOB_APPT_PCT	NOT NULL	NUMBER(5,2)
PERFJOB_ASSGN_SALARY	NOT NULL	NUMBER(11,2)
PERFJOB_ANN_SALARY	NOT NULL	NUMBER(11,2)
PERFJOB_FACTOR	NOT NULL	NUMBER(3,1)
PERFJOB_PAYS	NOT NULL	NUMBER(3,1)
PERFJOB_ACTIVITY_DATE	NOT NULL	DATE
PERFJOB_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PERFJOB_DATA_ORIGIN		VARCHAR2(30 CHAR)
PERFJOB_ACKNOWLEDGE_DATE		DATE

Database Column	Null?	Data Type
PERFJOB_ACKNOWLEDGE_USER_ID		VARCHAR2(30 CHAR)
PERFJOB_DESC		VARCHAR2(30 CHAR)
PERFJOB_END_DATE		DATE
PERFJOB_DFPR_CODE		VARCHAR2(4 CHAR)
PERFJOB_HRS_DAY		NUMBER(6,2)
PERFJOB_HRS_PAY		NUMBER(6,2)
PERFJOB_SAL_TABLE		VARCHAR2(2 CHAR)
PERFJOB_SAL_GRADE		VARCHAR2(5 CHAR)
PERFJOB_SAL_STEP		NUMBER(3)
PERFJOB_FTE		NUMBER(6,3)
PERFJOB_REG_RATE		NUMBER(11,6)
PERFJOB_COAS_CODE_POSN		VARCHAR2(1 CHAR)
PERFJOB_POSN_OVRLOAD_SRCE		VARCHAR2(6 CHAR)
PERFJOB_SUFF_OVRLOAD_SRCE		VARCHAR2(2 CHAR)

PERFJER

Database Column	Null?	Data Type
PERFJER_TERM_CODE	NOT NULL	VARCHAR2(6 CHAR)
PERFJER_PIDM	NOT NULL	NUMBER(8)
PERFJER_POSN	NOT NULL	VARCHAR2(6 CHAR)
PERFJER_SUFF	NOT NULL	VARCHAR2(2 CHAR)
PERFJER_EFFECTIVE_DATE	NOT NULL	DATE
PERFJER_EARN_CODE	NOT NULL	VARCHAR2(3 CHAR)
PERFJER_ACTIVE_IND	NOT NULL	VARCHAR2(1 CHAR)
PERFJER_SHIFT	NOT NULL	VARCHAR2(1 CHAR)
PERFJER_ACTIVITY_DATE	NOT NULL	DATE
PERFJER_USER_ID	NOT NULL	VARCHAR2(30 CHAR)

Database Column	Null?	Data Type
PERFJER_DATA_ORIGIN		VARCHAR2(30 CHAR)
PERFJER_HRS		NUMBER(6,2)
PERFJER_SPECIAL_RATE		NUMBER(12,6)
PERFJER_CANCEL_DATE		DATE

PERFJLD

Database Column	Null?	Data Type
PERFJLD_TERM_CODE	NOT NULL	VARCHAR2(6 CHAR)
PERFJLD_PIDM	NOT NULL	NUMBER(8)
PERFJLD_POSN	NOT NULL	VARCHAR2(6 CHAR)
PERFJLD_SUFF	NOT NULL	VARCHAR2(2 CHAR)
PERFJLD_EFFECTIVE_DATE	NOT NULL	DATE
PERFJLD_SEQ_NO	NOT NULL	NUMBER(3)
PERFJLD_PERCENT	NOT NULL	NUMBER(5,2)
PERFJLD_ACTIVITY_DATE	NOT NULL	DATE
PERFJLD_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PERFJLD_DATA_ORIGIN		VARCHAR2(30 CHAR)
PERFJLD_COAS_CODE		VARCHAR2(1 CHAR)
PERFJLD_ACCI_CODE		VARCHAR2(6 CHAR)
PERFJLD_FUND_CODE		VARCHAR2(6 CHAR)
PERFJLD_ORGN_CODE		VARCHAR2(6 CHAR)
PERFJLD_ACCT_CODE		VARCHAR2(6 CHAR)
PERFJLD_PROG_CODE		VARCHAR2(6 CHAR)
PERFJLD_ACTV_CODE		VARCHAR2(6 CHAR)
PERFJLD_LOCN_CODE		VARCHAR2(6 CHAR)
PERFJLD_PROJ_CODE		VARCHAR2(8 CHAR)
PERFJLD_CTYP_CODE		VARCHAR2(2 CHAR)

Database Column	Null?	Data Type
PERFJLD_ACCT_EXTERNAL_CDE		VARCHAR2(60 CHAR)
PERFJLD_ENC_OVERRIDE_END_DATE		DATE

PERFLCM

Database Column	Null?	Data Type
PERFLCM_TERM_CODE	NOT NULL	VARCHAR2(6 CHAR)
PERFLCM_PIDM	NOT NULL	NUMBER(8)
PERFLCM_SEQ_NO	NOT NULL	NUMBER(8)
PERFLCM_COMMENTS	NOT NULL	VARCHAR2(4000 CHAR)
PERFLCM_COMMENTS_TYPE	NOT NULL	VARCHAR2(1 CHAR)
PERFLCM_ACTIVITY_DATE	NOT NULL	DATE
PERFLCM_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PERFLCM_DATA_ORIGIN		VARCHAR2(30 CHAR)

PERFLER

Database Column	Null?	Data Type
PERFLER_TERM_CODE	NOT NULL	VARCHAR2(6 CHAR)
PERFLER_PIDM	NOT NULL	NUMBER(8)
PERFLER_SEQ_NO	NOT NULL	NUMBER(6)
PERFLER_MSG_TYPE	NOT NULL	VARCHAR2(1 CHAR)
PERFLER_ERROR_MSG	NOT NULL	VARCHAR2(2000 CHAR)
PERFLER_ACTIVITY_DATE	NOT NULL	DATE
PERFLER_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PERFLER_DATA_ORIGIN		VARCHAR2(30 CHAR)

PERFISO

Database Column	Null?	Data Type
PERFISO_TERM_CODE	NOT NULL	VARCHAR2(6 CHAR)
PERFISO_PIDM	NOT NULL	NUMBER(8)
PERFISO_CRN	NOT NULL	VARCHAR2(5 CHAR)
PERFISO_CATEGORY	NOT NULL	VARCHAR2(2 CHAR)
PERFISO_POSN	NOT NULL	VARCHAR2(6 CHAR)
PERFISO_SUFF	NOT NULL	VARCHAR2(2 CHAR)
PERFISO_JOB_EFFECTIVE_DATE	NOT NULL	DATE
PERFISO_ACTIVITY_DATE	NOT NULL	DATE
PERFISO_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PERFISO_DATA_ORIGIN		VARCHAR2(30 CHAR)
PERFISO_RATE		NUMBER(7,2)
PERFISO_CALC_METHOD		VARCHAR2(1 CHAR)
PERFISO_COMP_CREDIT_HRS		NUMBER(7,3)
PERFISO_COMP_HRS_WEEK		NUMBER(5,2)
PERFISO_COMP_WORKLOAD		NUMBER(9,3)
PERFISO_COMP_ENRL_COMP		NUMBER(4)
PERFISO_COMPENSATION_AMOUNT		NUMBER(11,2)

PERFNIO

Database Column	Null?	Data Type
PERFNIO_TERM_CODE	NOT NULL	VARCHAR2(6 CHAR)
PERFNIO_PIDM	NOT NULL	NUMBER(8)
PERFNIO_SEQ_NO	NOT NULL	NUMBER(6)
PERFNIO_NIST_CODE	NOT NULL	VARCHAR2(4 CHAR)
PERFNIO_POSN	NOT NULL	VARCHAR2(6 CHAR)

Database Column	Null?	Data Type
PERFNIO_SUFF	NOT NULL	VARCHAR2(2 CHAR)
PERFNIO_JOB_EFFECTIVE_DATE	NOT NULL	DATE
PERFNIO_ACTIVITY_DATE	NOT NULL	DATE
PERFNIO_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PERFNIO_DATA_ORIGIN		VARCHAR2(30 CHAR)
PERFNIO_COLL_CODE		VARCHAR2(2 CHAR)
PERFNIO_DEPT_CODE		VARCHAR2(4 CHAR)
PERFNIO_RATE		NUMBER(9,2)
PERFNIO_CALC_METHOD		VARCHAR2(1 CHAR)
PERFNIO_COMP_NIST_WORKLOAD		NUMBER(9,3)
PERFNIO_COMP_WEEKLY_HRS		NUMBER(9,3)
PERFNIO_COMPENSATION_AMOUNT		NUMBER(11,2)

PERFCNT

Database Column	Null?	Data Type
PERFCNT_TERM_CODE	NOT NULL	VARCHAR2(6 CHAR)
PERFCNT_PIDM	NOT NULL	NUMBER(8)
PERFCNT_FCNT_CODE	NOT NULL	VARCHAR2(2 CHAR)
PERFCNT_ACTIVITY_DATE	NOT NULL	DATE
PERFCNT_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PERFCNT_DATA_ORIGIN		VARCHAR2(30 CHAR)

Changed Tables

The following tables have been modified for the Faculty Load and Compensation module.

NBTORSF

Database Column	Null?	Data Type
NBTORSF_COAS_CODE		VARCHAR2(1 CHAR)

NSRSPSC

Database Column	Null?	Data Type
NSRSPSC_MODULE_TYPE		VARCHAR2(1 CHAR)

PTRINST

Database Column	Null?	Data Type
PTRINST_FL_ORGN_SECURITY_IND	NOT NULL	VARCHAR2(1 CHAR)
PTRINST_EDIT_FACULTY_POSN_IND	NOT NULL	VARCHAR2(1 CHAR)

PTRUSER

Database Column	Null?	Data Type
PTRUSER_MASTER_FL_ORGN_IND	NOT NULL	VARCHAR2(1 CHAR)

PERBFAC

Database Column	Null?	Data Type
PERBFAC_FLCL_CODE		VARCHAR2(6 CHAR)

New Scripts

The following scripts are associated with the new tables for the Faculty Load and Compensation module.

Note

Unless otherwise noted, new scripts are run as part of the upgrade process for a release. ■

perfasg_080000_01.sql

This script creates the Faculty Load Instructional Assignment Table (PERFASG).

perfasg_080000_02.sql

This script creates the primary key for the PERFASG table.

perfasg_080000_03.sql

This script creates the Index, PERFASG_JOBS_INDEX for the PERFASG table.

perfasg_080000_04.sql

This is the initial creation of the script for the Index, PERFASG_KEY_INDEX2.

perfasg_080000_05.sql

This script creates a foreign key FK1_PERFASG_INV_STVCAMP_CODE for the PERFASG table.

perfasg_080000_06.sql

This script creates a foreign key FK1_PERFASG_INV_STV_COLL_CODE for the PERFASG table.

perfasg_080000_07.sql

This script creates a foreign key FK1_PERFASG_INV_STVFCNT_CODE for the PERFASG table.

perfasg_080000_08.sql

This script creates a foreign key FK1_PERFASG_INV_NBBPOSN_KEY for the PERFASG table.

perfasg_080000_09.sql

This script creates a foreign key, FK1_PERFASG_INV_STVTERM_CODE for the PERFASG table.

perfasg_080000_10.sql

This script adds column comments to the PERFASG table.

perfasg_080000_11.sql

This script creates the Index, PERFASG_CAMP_INDEX for the PERFASG table.

perfcin_080000_01.sql

This script creates the Faculty Load Course Incremental Compensation Table (PERFCIN).

perfcin_080000_02.sql

This script creates the primary key for the PERFCIN table.

perfcin_080000_03.sql

This script creates a foreign key FK1_PERFCIN_INV_PERFASG_KEY for the PERFCIN table.

perfcin_080000_04.sql

This script creates a foreign key FK1_PERFCIN_INV_STVTERM_CODE for the PERFCIN table.

perfcin_080000_05.sql

This script creates a foreign key FK1_PERFCIN_INV_PTVFLIC_CODE for the PERFCIN table.

perfcin_080000_06.sql

This script adds column comments to the PERFCIN table.

perfcnt_080000_01.sql

This script creates the Faculty Load Contract Types Table (PERFCNT).

perfcnt_080000_02.sql

This script creates the primary key for the PERFCNT table.

perfcnt_080000_03.sql

This script creates a foreign key FK1_PERFCNT_INV_STVTERM_CODE for the PERFCNT table.

perfcnt_080000_04.sql

This script creates a foreign key FK1_PERFCNT_INV_STVFCNT_CODE for the PERFCNT table.

perfcnt_080000_05.sql

This script adds column comments to the PERFCNT table.

perfcsc_080000_01.sql

This script creates the Faculty Load Schedule Type Compensation Table (PERFCSC).

perfcsc_080000_02.sql

This script creates the primary key for the PERFCSC table.

perfcsc_080000_03.sql

This script creates a foreign key FK1_PERFCSC_INV_PERFASG_KEY for the PERFCSC table.

perfcsc_080000_04.sql

This script creates a foreign key FK1_PERFCSC_INV_STVTERM_CODE for the PERFCSC table.

perfcsc_080000_05.sql

This script creates a foreign key FK1_PERFCSC_INV_PTVFLCL_CODE for the PERFCSC table.

perfcsc_080000_06.sql

This script adds column comments to the PERFCSC table.

perfiso_080000_01.sql

This script creates the Faculty Load Overload Instructional Compensation Table (PERFISO).

perfiso_080000_02.sql

This script creates the primary key for the PERFISO table.

perfiso_080000_03.sql

This script creates the index, PERFISO_JOBS_INDEX for the PERFISO table.

perfiso_080000_04.sql

This script creates a foreign key FK1_PERFISO_INV_STVTERM_CODE for the PERFISO table.

perfiso_080000_05.sql

This script creates a foreign key FK1_PERFISO_INV_NBBPOSN_KEY for the PERFISO table.

perfiso_080000_06.sql

This script adds column comments to the PERFISO table.

perfjer_080000_01.sql

This script creates the Faculty Load Job Default Earnings Table (PERFJER).

perfjer_080000_02.sql

This script creates the primary key for the PERFJER table.

perfjer_080000_03.sql

This script creates a foreign key FK1_PERFJER_INV_STVTERM_CODE for the PERFJER table.

perfjer_080000_04.sql

This script creates a foreign key FK1_PERFJER_INV_NBBPOSN_KEY for the PERFJER table.

perfjer_080000_05.sql

This script creates a foreign key FK1_PERFJER_INV_PTREARN_KEY for the PERFJER table.

perfjer_080000_06.sql

This script adds column comments to the PERFJER table.

perfjld_080000_01.sql

This script creates the Faculty Job Labor Distribution Table. (PERFJLD).

perfjld_080000_02.sql

This script creates the primary key for the PERFJLD table.

perfjld_080000_03.sql

This script creates the index, PERFJLD_FOAPAL_INDEX. for the PERFJLD table.

perfjld_080000_04.sql

This script creates a foreign key FK1_PERFJLD_INV_STVTERM_KEY for the PERFJLD table.

perfjld_080000_05.sql

This script creates a foreign key FK1_PERFJLD_INV_NBBPOSN_KEY for the PERFJLD table.

perfjld_080000_06.sql

This script adds column comments to the PERFJLD table.

perfjob_080000_01.sql

This script creates the Faculty Compensation Detail Job Table (PERFJOB).

perfjob_080000_02.sql

This script creates the primary key for the PERFJOB table.

perfjob_080000_03.sql

This script creates the index, PERFJOB_ORGN_INDEX for the PERFJOB table.

perfjob_080000_04.sql

This script creates the index, PERFJOB_ECLS_INDEX for the PERFJOB table.

perfjob_080000_05.sql

This script creates a foreign key FK1_PERFJOB_INV_STVTERM_CODE for the PERFJOB table.

perfjob_080000_06.sql

This script creates a foreign key FK1_PERFJOB_INV_NBBPOSN_KEY for the PERFJOB table.

perfjob_080000_07.sql

This script creates a foreign key FK1_PERFJOB_INV_PTRJCRE_KEY for the PERFJOB table.

perfjob_080000_08.sql

This script creates a foreign key FK1_PERFJOB_INV_PTRECLS_KEY for the PERFJOB table.

perfjob_080000_09.sql

This script adds column comments to the PERFJOB table.

perflcm_080000_01.sql

This script creates the Faculty Load Compensation Comment Table (PERFLCM).

perflcm_080000_02.sql

This script creates the primary key for the PERFLCM table.

perflcm_080000_03.sql

This script creates a foreign key FK1_PERFLCM_INV_STVTERM_CODE for the PERFLCM table.

perflcm_080000_04.sql

This script adds column comments to the PERFLCM table.

perfler_080000_01.sql

This script creates the Faculty Load Compensation Errors Table (PERFLER).

perfler_080000_02.sql

This script creates the primary key for the PERFLER table.

perfler_080000_03.sql

This script creates a foreign key FK1_PERFLER_INV_STVTERM_CODE for the PERFLER table.

perfler_080000_04.sql

This script adds column comments to the PERFLER table.

perfnio_080000_01.sql

This script creates the Faculty Load Non-Instructional Overload Compensation Table (PERFNIO).

perfnio_080000_02.sql

This script creates the primary key for the PERFNIO table.

perfnio_080000_03.sql

This script creates the index, PERFNIO_NIST_INDEX for the PERFNIO table.

perfnio_080000_04.sql

This script creates the index, PERFNIO_JOBS_INDEX. for the PERFNIO table.

perfnio_080000_05.sql

This script creates a foreign key FK1_PERFNIO_INV_STVTERM_CODE for the PERFNIO table.

perfnio_080000_06.sql

This script creates a foreign key FK1_PERFNIO_INV_NBBPOSN_KEY for the PERFNIO table.

perfnio_080000_07.sql

This script creates a foreign key FK1_PERFNIO_INV_STV_COLL_CODE for the PERFNIO table.

perfnio_080000_08.sql

This script creates a foreign key FK1_PERFNIO_INV_STVDEPT_CODE for the PERFNIO table.

perfnio_080000_09.sql

This script adds column comments to the PERFNIO table.

perfnis_080000_01.sql

This script creates the Faculty Load Non-Instructional Assignment Compensation Table (PERFNIS).

perfnis_080000_02.sql

This script creates the primary key for the PERFNIS table.

perfnis_080000_03.sql

This script creates the index, PERFNIS_NIST_INDEX for the PERFNIS table.

perfnis_080000_04.sql

This script creates the index, PERFNIS_JOBS_INDEX. for the PERFNIS table.

perfnis_080000_05.sql

This script creates a foreign key FK1_PERFNIS_INV_STVTERM_CODE for the PERFNIS table.

perfnis_080000_06.sql

This script creates a foreign key FK1_PERFNIS_INV_NBBPOSN_KEY for the PERFNIS table.

perfnis_080000_07.sql

This script creates a foreign key FK1_PERFNIS_INV_STV_COLL_CODE for the PERFNIS table.

perfnis_080000_08.sql

This script creates a foreign key FK1_PERFNIS_INV_STVDEPT_CODE for the PERFNIS table.

perfnis_080000_09.sql

This script creates a foreign key FK1_PERFNIS_INV_STVFCNT_CODE for the PERFNIS table.

perfnis_080000_10.sql

This script creates a foreign key FK1_PERFNIS_INV_PTVFLCL_CODE for the PERFNIS table.

perfnis_080000_11.sql

This script adds column comments to the PERFNIS table.

ptrflct_080000_01.sql

This script creates the Faculty Load Contract Type Control Rules Table (PTRFLCT).

ptrflct_080000_02.sql

This script creates the primary key for the PERFNIS table.

ptrflct_080000_03.sql

This script creates a foreign key, FK1_PTRFLCT_INV_STVTERM_CODE for the PTRFLCT table.

ptrflct_080000_04.sql

This script creates a foreign key, FK1_PTRFLCT_INV_STVFCNT_CODE for the PTRFLCT table.

ptrflct_080000_05.sql

This script adds column comments to the PTRFLCT table.

ptrflct_080000_01.sql

This script creates the Faculty Load Incremental Compensation Rate Rules Table (PTRFLIC).

ptrflct_080000_02.sql

This script creates the primary key for the PERFLIC table.

ptrflct_080000_03.sql

This script creates a foreign key, FK1_PTRFLIC_INV_STVTERM_CODE for the PTRFLIC table.

ptrflct_080000_04.sql

This script creates a foreign key, FK1_PTRFLIC_INV_PTVFLIC_CODE for the PTRFLIC table.

ptrflct_080000_05.sql

This script adds column comments to the PTRFLIC table.

ptrnilv_080000_01.sql

This script creates the Non-Instructional Base Rate by Level Rules table (PTRNILV).

ptrnilv_080000_02.sql

This script creates the primary key for the PTRNILV table.

ptrnilv_080000_03.sql

This script creates a foreign key, FK1_PTRNILV_INV_STVTERM_CODE for the PTRNILV table.

ptrnilv_080000_04.sql

This script creates a foreign key, FK1_PTRNILV_INV_STVFCNT_CODE for the PTRNILV table.

ptrnilv_080000_05.sql

This script creates a foreign key, FK1_PTRNILV_INV_PTVFLCL_CODE for the PTRNILV table.

ptrnilv_080000_06.sql

This script creates a foreign key, FK1_PTRNILV_INV_PTRNIST_KEY for the PTRNILV table.

ptrnilv_080000_07.sql

This script adds column comments to the PTRNILV table.

ptrschd_080000_01.sql

This script creates the Faculty Load Instructional Schedule Type Base Rate Rules Table (PTRSCHD).

ptrschd_080000_02.sql

This script creates the primary key for the PTRSCHD table.

ptrschd_080000_03.sql

This script creates a foreign key, FK1_PTRSCHD_INV_STVTERM_CODE for the PTRSCHD table.

ptrschd_080000_04.sql

This script creates a foreign key, FK1_PTRSCHD_INV_STVCAMP_CODE for the PTRSCHD table.

ptrschd_080000_05.sql

This script creates a foreign key, FK1_PTRSCHD_INV_STV_COLL_CODE for the PTRSCHD table.

ptrschd_080000_06.sql

This script creates a foreign key, FK1_PTRSCHD_INV_STVFCNT_CODE for the PTRSCHD table.

ptrschd_080000_07.sql

This script adds column comments to the PTRSCHD table.

ptrsclv_080000_01.sql

This script creates the Faculty Instructional Schedule Type Base Rate by Level Rules Table (PTRSCHD).

ptrsclv_080000_02.sql

This script creates the primary key for the PTRSCLV table.

ptrsclv_080000_03.sql

This script creates a foreign key, FK1_PTRSCLV_INV_STVTERM_CODE for the PTRSCLV table.

ptrsclv_080000_04.sql

This script creates a foreign key, FK1_PTRSCLV_INV_STVCAMP_CODE for the PTRSCLV table.

ptrsclv_080000_05.sql

This script creates a foreign key, FK1_PTRSCLV_INV_STVCOLL_CODE for the PTRSCLV table.

ptrsclv_080000_06.sql

This script creates a foreign key, FK1_PTRSCLV_INV_STVFCNT_CODE for the PTRSCLV table.

ptrsclv_080000_07.sql

This script creates a foreign key, FK1_PTRSCLV_INV_PTVFLCL_CODE for the PTRSCLV table.

ptrsclv_080000_08.sql

This script creates a foreign key, FK1_PTRSCLV_INV_PTRSCHD_KEY for the PTRSCLV table.

ptrsclv_080000_09.sql

This script adds column comments to the PTRSCLV table.

ptrflcl_080000_01.sql

This script creates the Faculty Load Compensation Level Code Validation Table (PTVFLCL).

ptrflcl_080000_02.sql

This script creates the primary key for the PTRFLCL table.

ptrfcl_080000_03.sql

This script adds column comments to the PTRFLCL table.

ptvflic_080000_01.sql

This script creates the Faculty Load Incremental Compensation Code Validation Table (PTVFLIC).

ptvflic_080000_02.sql

This script creates the primary key for the PTRFLIC table.

ptvflic_080000_03.sql

This script adds column comments to the PTRFLIC table.

Changed Scripts

The following scripts modify existing Banner Human Resources and Position Control tables.

nbtorsf_080000_01.sql

This script adds a new column, NBTORSF_COAS_CODE to the NBTORSF table.

nbtorsf_080000_02.sql

This script drops the primary key of the NBTORSF table.

nbtorsf_080000_03.sql

This script creates a unique index, NBTORSF_KEY_INDEX for the NBTORSF table.

nbtorsf_080000_04.sql

This script adds a column comment to the NBTORSF_COAS_CODE column.

nsrspsc_080000_01.sql

This script adds a new column, NSRSPSC_MODULE_TYPE to the NSRSPSC table.

nsrspsc_080000_02.sql

This script sets a value of S to the NSRSPSC_MODULE_TYPE column.

nsrspsc_080000_03.sql

This script sets the NSRSPSC_MODULE_TYPE column as a NOT NULL column.

nsrspsc_080000_04.sql

This script adds a comment to the NSRSPSC_MODULE_TYPE column of the NSRSPSC table.

nsrspsc_080000_05.sql

This script drops the NSRSPSC_KEY_INDEX of the NSRSPSC table.

nsrspsc_080000_06.sql

This script recreates the NSRSPSC_KEY_INDEX with the new NSRSPSC_MODULE_TYPE column.

perbfac_080000_01.sql

This script adds a new column PERBFAC_FLCL_CODE to the PERBFAC table.

perbfac_080000_02.sql

This script adds a comment to the PERBFAC_FLCL_CODE column.

perbfac_080000_03.sql

This script adds a foreign key to the PERBFAC table.

ptrinst_080000_01.sql

This script adds two columns, PTRINST_FL_ORGN_SECURITY, and PTRINST_EDIT_FACULTY_POSN_IND to the PTRINST table.

ptrinst_080000_02.sql

This script sets a value of *N* for the two columns PTRINST_FL_ORGN_SECURITY, and PTRINST_EDIT_FACULTY_POSN_IND.

ptrinst_080000_03.sql

This script sets the two columns PTRINST_FL_ORGN_SECURITY, and PTRINST_EDIT_FACULTY_POSN_IND as NOT NULL.

ptrinst_080000_04.sql

This script adds comments to the two new database columns.

ptruser_080000_01.sql

This script adds the column, PTRUSER_MASTER_FL_ORGN_IND to the PTRUSER table.

ptruser_080000_02.sql

This script sets a value of *N* for the PTRUSER_MASTER_FL_ORGN_IND column.

ptruser_080000_03.sql

This script sets the PTRUSER_MASTER_FL_ORGN_IND column as NOT NULL.

ptruser_080000_04.sql

This script adds a comment to the PTRUSER_MASTER_FL_ORGN_IND column.

petfjob0.sql

This script updates the trigger on the PERFJOB table for the Workflow event JOBCOMPENSATIONLOCK.

petfjob1.sql

This script inserts the trigger on perfjob table for the workflow event JOBCOMPENSATIONLOCK.

New Packages

The following packages have been newly created for the Faculty Load and Compensation module.

nokorgn1.sql

This is a new package body for the organization roll-up structure

nokorgn.sql

This is a new package for the organization roll-up structure

pekfasg1.sql

This package is used to extract faculty assignments and compute faculty compensation.

pekfasg.sql

This package contains functions and procedures for Faculty Load and Compensation module.

pekflac1.sql

This package contains the logic for the Faculty Load and Compensation module.

pekflac.sql

This package contains functions and procedures for Faculty Load and Compensation module.

Changed Packages

The following packages have been modified to accommodate for the Faculty Load and Compensation module.

nkbud1.sql

Functions `nokflib.f_valid_fin_budg_orgn_list` and `f_valid_HR_budg_orgn_list` have been replaced with `f_valid_fin_rollup_orgns` and `f_valid_HR_rollup_orgns` in a new package, `nokorgn` so that they can be used in both Salary Planner and Faculty Load Compensation modules.

The organization rollup security check, `NOKSECR.f_budg_orgn_security`, has been replaced with `NSKSECR.f_orgn_rollup_access_ind`.

nkbudg.sql

Functions `nokflib.f_valid_fin_budg_orgn_list` and `f_valid_HR_budg_orgn_list` have been replaced with `f_valid_fin_rollup_orgns` and `f_valid_HR_rollup_orgns` in a new package, `nokorgn` so that they can be used in both Salary Planner and Faculty Load Compensation modules.

nokepc1.sql

A new procedure has been added to return a valid list of salary groups, tables, grades, or steps for self-service popup window: `p_open_salary_group_rc`, `p_open_salary_table_rc`, `p_open_salary_grade_rc`, and `p_open_salary_step_rc`.

nokepcr.sql

A new procedure has been added to return a valid list of salary groups, tables, grades, or steps for self-service popup window: `p_open_salary_group_rc`, `p_open_salary_table_rc`, `p_open_salary_grade_rc`, and `p_open_salary_step_rc`.

nokfli1.sql

This package has been modified to consolidate the rollup orgn security logic used in Salary Planner and Faculty Load Compensation to `nsksecr` package and remove the function, `f_get_nsrspsc_fin_orgn_cv`.

References to the salary planner user orgn security table, `NSRSPSC`, have been modified to include the new field, `NSRSPSC_MODULE_TYPE`.

nokflib.sql

This package has been modified to consolidate the rollup orgn security logic used in Salary Planner and Faculty Load Compensation to nsksecr package and remove the function, `f_get_nsrspsc_fin_orgn_cv`.

References to the salary planner user orgn security table, NSRSPSC, have been modified to include the new field, NSRSPSC_MODULE_TYPE.

nokfoa1.sql

This package has been modified for the faculty load and compensation enhancement.

nokglob1.sql

New globals, FACULTY_LOAD_ORGN_SECURITY_IND, SALA_PLANNER_ORGN_SECURITY_IND, and ENCUMBRANCE_RECAST_IND have been added to this package.

nokglob.sql

New globals, FACULTY_LOAD_ORGN_SECURITY_IND and SALA_PLANNER_ORGN_SECURITY_IND have been added to this package.

noklis1.sql

The static lists, FL_CRSE_CALC_METHOD, FL_CRSE_INCR_METHOD, FL_NIST_CALC_METHOD, and FL_LOCK_IND have been added for Course Calculation Methods, Course Increment Calculation Method, Non-Instructional Calculation Methods, and Lock Indicators.

noksec1.sql

The `f_time_entry_security` function has been modified to call renamed procedures from the nsksecr package. The rollup orgn security logic used in Salary Planner and Faculty Load Compensation has been consolidated in the nsksecr package. The following functions have been removed: `f_budg_orgn_security`, `p_chk_master_budg_orgn`, `f_get_nsrspsc_HR_orgn_cv` and `nokflib.f_get_nsrspsc_fin_orgn_cv`.

noksecr.sql

The rollup orgn security logic used in Salary Planner and Faculty Load Compensation has been consolidated in the **nsksecr** package. The following functions have been removed: **f_budg_orgn_security**, **p_chk_master_budg_orgn**, **f_get_nsrspsc_HR_orgn_cv** and **nokflib.f_get_nsrspsc_fin_orgn_cv**.

nokuser1.sql

ptruser_master_fl_orgn_ind has been added to **f_ptruser_rec**.

nokuser.sql

The **r_master_fl_orgn_ind** column has been added to **nokuser_rectype**.

nsksec1.sql

f_orgn_rollup_access_ind, **f_faculty_load_access_ind**, **p_check_orgn_rollup_access**, and **p_check_faculty_load_access** have been added to this package. **p_user_id** has been removed from all public signatures. **Gb_common.f_sct_user** is now used to check HR security. In self-service, the login PIDM is used to retrieve a user ID from the **GOBEACC** table. If a **GOBEACC** entry is found, the **gobeacc_username** is stored in a context. This context will override **gb_common.f_sct_user**.

nsksecr.sql

f_orgn_rollup_access_ind, **f_faculty_load_access_ind**, **p_check_orgn_rollup_access**, and **p_check_faculty_load_access** have been added to this package. **p_user_id** has been removed from all public signatures. **Gb_common.f_sct_user** is now used to check HR security. In self-service, the login PIDM is used to retrieve a user ID from the **GOBEACC** table. If a **GOBEACC** entry is found, the **gobeacc_username** is stored in a context. This context will override **gb_common.f_sct_user**.

pokpval.sql

New procedures, **STVTERM_EQUAL**, **FCNT_EXISTS**, **JCRE_EXISTS**, **PTRM_EXISTS** and **EMPLOYEE_ID_EXISTS** were added to validate Term Code, Contract Type, Job Change Reason, and Part of Term parameters in Job Submission.



New APIs

The following table lists the APIs associated with the Faculty Load and Compensation module.

Table 1: Faculty Load and Compensation APIs

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_FAC_CNTRACT	FAC_CNTRACT	PB_FAC_CNTRACT	ptkb_fac_cntract0.sql ptkb_fac_cntract1.sql	PTRFLCT	
		PB_FAC_CNTRACT_RULES	ptkb_fac_cntract_r0.sql ptkb_fac_cntract_r1.sql		
		PB_FAC_CNTRACT_STRINGS	ptkb_fac_cntract_s0.sql ptkb_fac_cntract_s1.sql		
		DML	ptkd_ptrflct0.sql ptkd_ptrflct1.sql		
PB_FAC_COMMENTS	FAC_COMMENTS	PB_FAC_COMMENTS	pekb_fac_comments0.sql pekb_fac_comments1.sql	PERFLCM	
		PB_FAC_COMMENTS_RULES	pekb_fac_comments_r0.sql pekb_fac_comments_r1.sql		
		PB_FAC_COMMENTS_STRINGS	pekb_fac_comments_s0.sql pekb_fac_comments_s1.sql		
		DML	pekd_perflcm0.sql pekd_perflcm1.sql		

Table 1: Faculty Load and Compensation APIs

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_FAC_CRSASSIGN	FAC_CRSASSIGN	PB_FAC_CRSASSIGN	pekb_fac_crsassign0.sql pekb_fac_crsassign1.sql	PERFASG	
		PB_FAC_CRSASSIGN_RULES	pekb_fac_crsassign_r0.sql pekb_fac_crsassign_r1.sql		
		PB_FAC_CRSASSIGN_STRINGS	pekb_fac_crsassign_s0.sql pekb_fac_crsassign_s1.sql		
		DML	pekd_perfasg0.sql pekd_perfasg1.sql		
PB_FAC_FCNT	FAC_FCNT	PB_FAC_FCNT	pekb_fac_fcnt0.sql pekb_fac_fcnt1.sql	PERFCNT	
		PB_FAC_FCNT_RULES	pekb_fac_fcnt_r0.sql pekb_fac_fcnt_r1.sql		
		PB_FAC_FCNT_STRINGS	pekb_fac_fcnt_s0.sql pekb_fac_fcnt_s1.sql		
		DML	pekd_perfcnt0.sql pekd_perfcnt1.sql		

Table 1: Faculty Load and Compensation APIs

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_FAC_CRSECOMP	FAC_CRSECOMP	PB_FAC_CRSECOMP	pekb_fac_crsecomp0.sql pekb_fac_crsecomp1.sql	PERFCSC	
		PB_FAC_CRSECOMP_RULES	pekb_fac_crsecomp_r0.sql pekb_fac_crsecomp_r1.sql		
		PB_FAC_CRSECOMP_STRINGS	pekb_fac_crsecomp_s0.sql pekb_fac_crsecomp_s1.sql		
		DML	pekd_perfsc0.sql pekd_perfsc1.sql		
PB_FAC_ERRORS	FAC_ERRORS	PB_FAC_ERRORS	pekb_fac_errors0.sql pekb_fac_errors1.sql	PERFLER	
		PB_FAC_ERRORS_RULES	pekb_fac_errors_r0.sql pekb_fac_errors_r1.sql		
		PB_FAC_ERRORS_STRINGS	pekb_fac_errors_s0.sql pekb_fac_errors_s1.sql		
		DML	pekd_perfler0.sql pekd_perfler1.sql		

Table 1: Faculty Load and Compensation APIs

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_FAC_INCRCOMP	FAC_INCRCOMP	PB_FAC_INCRCOMP	pekb_fac_incrcomp0.sql pekb_fac_incrcomp1.sql	PERFCIN	
		PB_FAC_INCRCOMP_RULES	pekb_fac_incrcomp_r0.sql pekb_fac_incrcomp_r1.sql		
		PB_FAC_INCRCOMP_STRINGS	pekb_fac_incrcomp_s0.sql pekb_fac_incrcomp_s1.sql		
		DML	pekd_perfcin0.sql pekd_perfcin1.sql		
PB_FAC_INCRATE	FAC_INCRATE	PB_FAC_INCRATE	ptkb_fac_incrate0.sql ptkb_fac_incrate1.sql	PTRFLIC	
		PB_FAC_INCRATE_RULES	ptkb_fac_incrate_r0.sql ptkb_fac_incrate_r1.sql		
		PB_FAC_INCRATE_STRINGS	ptkb_fac_incrate_s0.sql ptkb_fac_incrate_s1.sql		
		DML	ptkd_ptrflic0.sql ptkd_ptrflic1.sql		

Table 1: Faculty Load and Compensation APIs

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_FAC_ISOLCOMP	FAC_ISOLCOMP	PB_FAC_ISOLCOMP	pekb_fac_isolcomp0.sql pekb_fac_isolcomp1.sql	PERFISO	
		PB_FAC_ISOLCOMP_RULES	pekb_fac_isolcomp_r0.sql pekb_fac_isolcomp_r1.sql		
		PB_FAC_ISOLCOMP_STRINGS	pekb_fac_isolcomp_s0.sql pekb_fac_isolcomp_s1.sql		
		DML	pekd_perfiso0.sql pekd_perfiso1.sql		
PB_FAC_JOBDETAIL	FAC_JOBDETAIL	PB_FAC_JOBDETAIL	pekb_fac_jobdetail0.sql pekb_fac_jobdetail1.sql	PERFJOB	
		PB_FAC_JOBDETAIL_RULES	pekb_fac_jobdetail_r0.sql pekb_fac_jobdetail_r1.sql		
		PB_FAC_JOBDETAIL_STRINGS	pekb_fac_jobdetail_s0.sql pekb_fac_jobdetail_s1.sql		
		DML	pekd_perfjob0.sql pekd_perfjob1.sql		

Table 1: Faculty Load and Compensation APIs

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_FAC_JOBISTR	FAC_JOBISTR	PB_FAC_JOBISTR	pekb_fac_jobistr0.sql pekb_fac_jobistr1.sql	PERFJLD	
		PB_FAC_JOBISTR_RULES	pekb_fac_jobistr_r0.sql pekb_fac_jobistr_r1.sql		
		PB_FAC_JOBISTR_STRINGS	pekb_fac_jobistr_s0.sql pekb_fac_jobistr_s1.sql		
		DML	pekd_perfjld0.sql pekd_perfjld1.sql		
PB_FAC_JOBEBARN	FAC_JOBEBARN	PB_FAC_JOBEBARN	pekb_fac_jobearns0.sql pekb_fac_jobearns1.sql	PERFJER	
		PB_FAC_JOBEBARN_RULES	pekb_fac_jobearns_r0.sql pekb_fac_jobearns_r1.sql		
		PB_FAC_JOBEBARN_STRINGS	pekb_fac_jobearns_s0.sql pekb_fac_jobearns_s1.sql		
		DML	pekd_perfjer0.sql pekd_perfjer1.sql		

Table 1: Faculty Load and Compensation APIs

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_FAC_NIOLCOMP	FAC_NIOLCOMP	PB_FAC_NIOLCOMP	pekb_fac_niolcomp0.sql pekb_fac_niolcomp1.sql	PERFNIO	PERFNIO
		PB_FAC_NIOLCOMP_RULES	pekb_fac_niolcomp_r0.sql pekb_fac_niolcomp_r1.sql		
		PB_FAC_NIOLCOMP_STRINGS	pekb_fac_niolcomp_s0.sql pekb_fac_niolcomp_s1.sql		
		DML	pekd_perfnio0.sql pekd_perfnio1.sql		
PB_FAC_NISTCOMP	FAC_NISTCOMP	PB_FAC_NISTCOMP	pekb_fac_nistcomp0.sql pekb_fac_nistcomp1.sql	PERFNIS	PERFNIS
		PB_FAC_NISTCOMP_RULES	pekb_fac_nistcomp_r0.sql pekb_fac_nistcomp_r1.sql		
		PB_FAC_NISTCOMP_STRINGS	pekb_fac_nistcomp_s0.sql pekb_fac_nistcomp_s1.sql		
		DML	pekd_perfnis0.sql pekd_perfnis1.sql		

Table 1: Faculty Load and Compensation APIs

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_FAC_NILRATE	FAC_NILRATE	PB_FAC_NILRATE	ptkb_fac_nilrate0.sql ptkb_fac_nilrate1.sql	PTRNILV	PTRNILV
		PB_FAC_NILRATE_RULES	ptkb_fac_nilrate_r0.sql ptkb_fac_nilrate_r1.sql		
		PB_FAC_NILRATE_STRINGS	ptkb_fac_nilrate_s0.sql ptkb_fac_nilrate_s1.sql		
		DML	ptkd_ptrnilv0.sql ptkd_ptrnilv1.sql		
PB_FAC_NISRATE	FAC_NISRATE	PB_FAC_NISRATE	ptkb_fac_nisrate0.sql ptkb_fac_nisrate1.sql	PTRNIST	PTRNIST
		PB_FAC_NISRATE_RULES	ptkb_fac_nisrate_r0.sql ptkb_fac_nisrate_r1.sql		
		PB_FAC_NISRATE_STRINGS	ptkb_fac_nisrate_s0.sql ptkb_fac_nisrate_s1.sql		
		DML	ptkd_ptrnist0.sql ptkd_ptrnist1.sql		

Table 1: Faculty Load and Compensation APIs

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_FAC_SCHRATE	FAC_SCHRATE	PB_FAC_SCHRATE	ptkb_fac_schrates0.sql ptkb_fac_schrates1.sql	PTRSCHD	PTRSCHD
		PB_FAC_SCHRATE_RULES	ptkb_fac_schrates_r0.sql ptkb_fac_schrates_r1.sql		
		PB_FAC_SCHRATE_STRINGS	ptkb_fac_schrates_s0.sql ptkb_fac_schrates_s1.sql		
		DML	ptkd_ptrsched0.sql ptkd_ptrsched1.sql		
PB_FAC_SCLRATE	FAC_SCLRATE	PB_FAC_SCLRATE	ptkb_fac_sclrates0.sql ptkb_fac_sclrates1.sql	PTRSCLV	PTRSCLV
		PB_FAC_SCLRATE_RULES	ptkb_fac_sclrates_r0.sql ptkb_fac_sclrates_r1.sql		
		PB_FAC_SCLRATE_STRINGS	ptkb_fac_sclrates_s0.sql ptkb_fac_sclrates_s1.sql		
		DML	ptkd_ptrsclev0.sql ptkd_ptrsclev1.sql		
PB_PTVFLCL	PB_PTVFLCL	PB_PTVFLCL	pvkb_ptvflcl0.sql pvkb_ptvflcl1.sql	PTVFLCL	PTVFLCL
PB_PTVFLIC	PB_PTVFLIC	PB_PTVFLIC	pvkb_ptvfllic0.sql pvkb_ptvfllic1.sql	PTVFLIC	PTVFLIC

New BPI

Table 2: Faculty Load and Compensation BPI

BPI Object Name	BPI Entity Name	Associated BPI Package	Associated Scripts	Associated APIs	Affected Objects
PP_FAC_JOBISTR	FAC_JOBISTR	PP_FAC_JOBISTR	pbkp_fac_job_labor0.sql pbkp_fac_job_labor1.sql	PB_FAC_JOBISTR	PERFJLD

3 Multiple Year Encumbering-Functional



Overview

The Grants Management Project in Banner Human Resources and Position Control is concerned with enhancing existing functionality in the following key areas:

- Encumbering
- Effort Certification, and
- Labor Redistribution

Due to the extensive changes involved, the functionality in the above three areas will be covered over two consecutive Banner releases, 8.0 and 8.1. Release 8.0 of Banner Human Resources and Position Control enhances encumbering functionality, and Release 8.1 will enhance the functionality with regard to effort certification and labor redistribution to complete all the components of the Grants Management Project listed above.

Currently, Banner Human Resources and Position Control support encumbering of labor and fringe distributions only for the *current active* fiscal year. The 8.0 release of Banner Human Resources and Position Control extends this encumbering functionality for multiple years and in the process, provides a more effective method to track labor and fringe encumbrances associated with grants.

This manual also includes a high-level summary of Banner Finance objects that have been added or changed to support this enhancement. For detailed information about these objects, please refer to the Banner Finance 8.0 Release Guide.

Recommendation

It is recommended that you implement Multiple Year Encumbrance enhancement at the end of the Fiscal Year when creating new fiscal year encumbrances.

Otherwise, if implemented during the fiscal year, the new encumbrance calculation logic in the Employee Jobs API and the new Encumbrance Maintenance Process (NBPENCM) may cause a rounding amount difference to be calculated and fed the first time the process is run.

Example

If the pre-enhancement encumbrance calculation was \$49,999.99 using the old logic, and the post-enhancement amount is \$50,000.01 with the new logic, then the difference of \$0.02 will be calculated for the **To Post** amount and fed to Banner Finance to adjust the original encumbrance.

Assumptions

For multiple year encumbering,

- Banner Finance and Grant module must be installed.
- Banner Human Resources and Position Control must be installed.
- Multiple year encumbering can be used only for the *System Calculated* method of salary encumbrances and encumbrance recasting.
- The *Hours Input* and *Value Input* salary encumbrance methods are not affected by multi-year encumbering, since they were created for specific situations and purposes.
- The *Payroll Liquidation* method does not use multiple year encumbering.
- Encumbering will only be calculated on an employee's job assignment (on NBAJOBS) by the Encumbrance Maintenance Process (NBPENCM), and not at the position budget level.

- Only job records that have a non-terminated date in the currently *Active* fiscal year will be considered for encumbrance calculations.
- Fiscal years must be established on the Banner Finance Fiscal Year Maintenance Form (FTMFSYR) for future associated grant years to allow for future HR fiscal years. Future fiscal years do not have to be *Open* in Finance.
- Fiscal years must be established on the Banner HR Fiscal Year Form (NBAFISC) for future associated grant years to calculate future year encumbrance amounts. Future fiscal years do not have to be *Active* in HR.
- Payroll calendar entries must be established on the Payroll Calendar Rules Form (PTRCALN) for all future payroll periods associated with grant years to calculate future year encumbrance amounts.
- Grant budgets will be posted in accordance with the related budget dates on FRMFUND or FRAGRNT.

Terms and Definitions

The following terms are used extensively in this enhancement.

Grant Period: The length of the grant; this may differ from the fiscal year and encompass more than one fiscal year.

Grant Budget Period: The budget period for a grant; this may encompass the entire grant period, or be a portion of the overall grant period.

Fund Type: A classification category of fund that represents their purpose. For example, Capital Projects, General, Education, Restricted, etc.

Changed Finance Objects

Grants information is created and maintained in Banner Finance. In an effort to coordinate and correlate grants information in Banner Finance with encumbrance calculations created in Banner Human Resources, extensive technical and functional changes have been made to ensure that data is synchronized between the two systems as labor costs associated with a grant are eventually directed to Banner Finance.

Consequently, the following changes have been made in *Banner Finance*:

- To support multiple year encumbering for grant-fund relationships, a new field, **Encumber Multi Year Labor** has been created on the following forms:
 - Fund Type Maintenance Form (FTMFTYP),
 - Fund Type Validation Form (FTVFTYP),
 - Research Accounting Fund Maintenance (FRMFUND),
- To provide better fund-grant related information, new fields have been added on the following form:
 - Fund Code Validation Form (FTVFUND)

A new form, Research Fund Inquiry Form (FRIFUND) has also been added.

- To ensure that Grant Budget Dates are synchronized based on any changes made to Project Dates, new edits have been added to the following form and process to notify the user:
 - Grant Maintenance Form (FRAGRNT)
 - Grant Interface Process (FRPGINF)
- To support multiple years encumbering, three new fields, **Encumber Multi Year Labor** and **Encumbrance Period**, and **Status** have been added to the following forms:
 - Detail Encumbrance Activity Form (FGIENCD)
 - Archive-Detail Encumbrance Activity (FXIENCD)
- To accurately process and report fiscal year-end encumbrances,
 - A new process, Roll HR Labor Encumbrances Process (FGRLENC) has been created to only roll year-end Human Resources (HR) labor encumbrances.
 - The existing process, Roll Open Encumbrances Process (FGRENRL) has been modified to ignore the processing of labor encumbrances as this will be handled by the new finance process.
 - New fields and a new edit have been added in the Year End Maintenance Form (FGAYRLM) to support the Roll HR Labor Encumbrances Process (FGRLENC).

Changed Position Control and Human Resources Objects

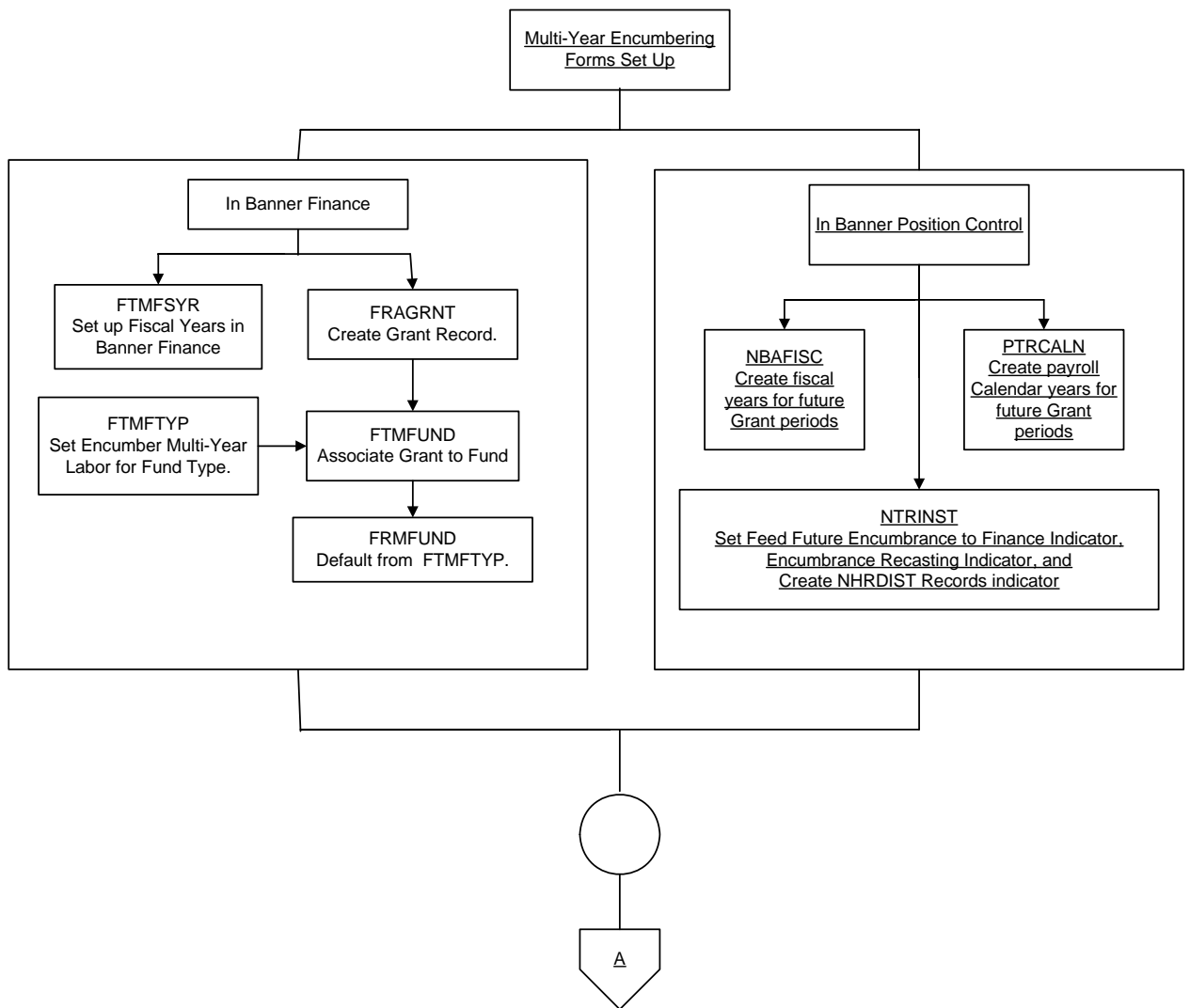
In Banner Human Resources and Position Control, corresponding form changes have been made to support Multiple Year Encumbering.

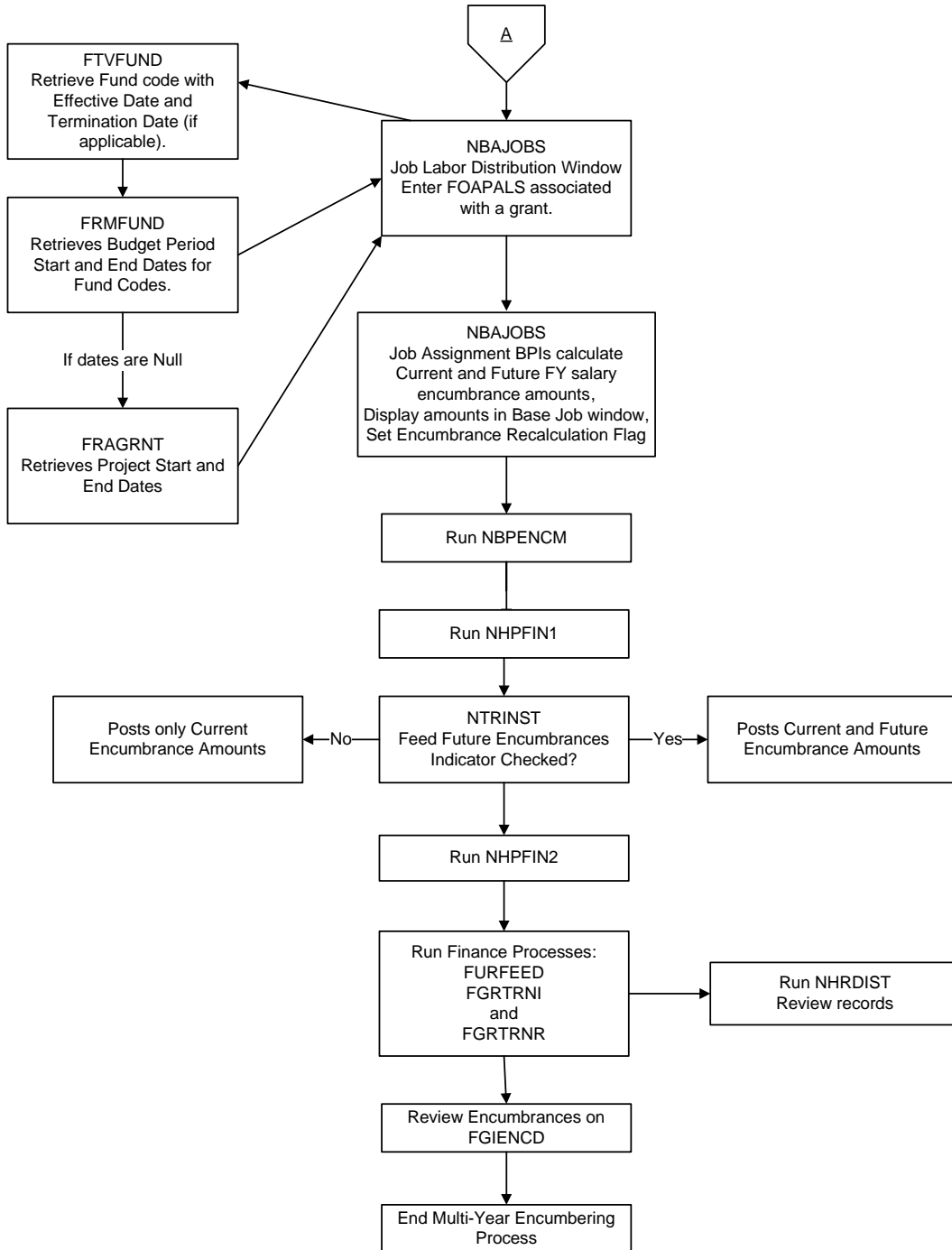
- To associate Grant Budget Dates or Project Dates with a grant-related labor distribution, the following forms have been modified:
 - Employee Jobs Form (NBAJOBS)
 - Labor Distribution Change History Form (NBIJLHS)
- To provide multiple year encumbrance information related to employee jobs, the following forms have been modified:
 - Employee Job History Form (PEIJHIS)
 - Employee Status Change Form (PEAESCH)
- To calculate encumbrances separate from budgets, a new process, the Encumbrance Maintenance Process (NBPENCM) has been created, and the existing Budget Maintenance Process (NBPBUDM) has been modified accordingly.
- To control the feeding of future years grant-related encumbrances to Banner Finance, the Position Control Installation Rules Form (NTRINST) has been modified.
- New future grant-related encumbrance logic has been added to calculate and track salary and associated fringe encumbrances under the fringe chargeback method. For this purpose the following processes have been modified:
 - Encumbrance Maintenance Process (NBPENCM)
 - Finance Extract Process (NHPFIN1)
- The following inquiry forms have been modified to improve search functionality with regard to grant and fund queries:
 - Employee Distribution Inquiry Form (NHIEDST)
 - Labor Distribution Data Inquiry Form (NHIDIST)

The Organization Payroll Distribution Report (NHRDIST) has also been modified to improve grant reporting.

- Existing EPAF rules have been modified to accommodate for multiple year encumbering on the Employee Jobs Form (NBAJOBS). Therefore the following forms have been modified:
 - Electronic Approval Usage Rules (NTRAUSG)
 - Electronic Personnel Action Form (NOAEPAF)
 - In Employee Self-Service, the EPAF page has also been modified along similar lines.

Multiple-Year Encumbering Process Flow





New Task

Process Multiple Year Encumbrances

To process multiple year encumbrances in Banner Human Resources and Position Control, perform the following key steps:

- Step 1: Forms Set Up in Banner Finance
- Step 2: Forms Set Up in Banner Human Resources and Position Control
- Step 3: Process Budget and Encumbrance Calculations

Note

Multiple year encumbering can only be used for the *System Calculated* method of salary encumbrances with Encumbrance Recasting.

The *Hours Input* and *Value Input* salary encumbrance methods are not affected by multiple year encumbering, since they were created for specific situations and purposes.

The Payroll Liquidation method does not use multiple year encumbering. This method does not look at every job when it is run. It only picks up changes made on NBAJOBS. Multiple year encumbering requires every job reviewed for any changes in Banner Finance dates or other information. The Encumbrance Recasting method looks at every job regardless of any changes, because the overall encumbrance is recalculated every time due to the entry of the Recast Date. ■

Step 1: Set Up Forms in Banner Finance

Set up the following Finance forms to establish fund and associated grant information, and trigger multiple year encumbrance calculations:

1. On the Fiscal Year Maintenance Form (FTMFSYR), establish future fiscal years in Banner Finance to allow for the creation of future fiscal years in Banner HR.

Refer to the Finance Release Guide and Online Help for more information on the FTMFSYR form.

Note

Future fiscal years do not have to be *Open* in Banner Finance. ■

2. For existing Fund Types:

Run the script `ftvftyp1.sql` to update the **Encumber Multi Year Labor** indicator for existing fund types on the Fund Type Maintenance Form (FTMFTYP) and associated Research Accounting Fund records on the Research Accounting Fund Maintenance Form (FRMFUND). This script is located in the `../finance/plus` directory. For more details refer to the Technical section of this release guide.

3. For New Fund Types, Funds, and Grants:

- The **Encumber Multi Year Labor** check box must be checked to indicate that multi-year encumbering functionality will be used with this fund type. This value will default to the Research Accounting Fund Maintenance Form (FRMFUND) when creating a new record. You can change this value.
 - If you change the value in this field for an existing record, the Encumber Multi Year Labor field on FRMFUND is not updated automatically. You will have to change this field manually.
 - If you change the value in this field for a Fund Type, you will also have to change any associated Research Accounting Fund records that exist on FRMFUND. The system reminds you to do this by displaying the following message:

Existing Fund records may need similar changes.

4. Create a Grant record on the Grant Maintenance Form (FRAGRNT).

5. Associate a Grant code with a Fund code on the Fund Code Maintenance Form (FTMFUND).

6. Create a Research Accounting Fund Maintenance record on FRMFUND and ensure that the **Encumber Multi Year Labor** check box is selected. This enables multi-year encumbering functionality for a specific grant and fund code combination.

If a fund code is not associated with a grant and you select the **Encumber Multi Year Labor** check box, the following message is displayed:

**ERROR* Encumber Multi Year Labor only allowed on Grant related records.*

Any change made to the **Encumber Multi Year Labor** check box will be picked up when you run the Encumbrance Maintenance Process (NBPENCM) in Banner Position Control. This ensures data is synchronized between Banner Finance and Banner Position Control by selecting Banner Finance records that are equal or less than equal to the Recast Date.

Step 2: Set Up Forms in Banner Human Resources and Position Control

To provide for multiple year encumbering, set up the following fields in Banner Human Resources and Position Control:

7. Establish fiscal years for future grant periods on the Fiscal Year Form (NBAFISC). This will be used to project encumbrance amounts for future fiscal years.

Refer to online help for more information on the NBAFISC form.

Note

Only one fiscal year per chart of accounts can be *Active* in Banner Human Resources. Therefore future fiscal years need do not have to be active. ■

8. Create payroll calendars for future grant periods on the Payroll Calendar Rules Form (PTRCALN). Encumbrance calculations are limited by PTRCALN records. If a Grant is accounted for over five years, but the calendar rules are only set up for two years, the encumbrance calculation will be limited to the two years.

Refer to online help for more information on the PTRCALN form.

9. On the Position Control Installation Rules Form (NTRINST), perform the following actions:

- 9.1. Select the **Create NHRDIST Records** check box to save and view historical information on the NHRDIST Report.

- 9.2. Select the **Encumbrance Recasting Indicator** check box.

- 9.3. Select the **Feed Future Encumbrance to Finance** check box to indicate that both, current year and future fiscal years encumbrance amounts are to be fed to Banner Finance. Otherwise, encumbrance amounts will be fed to Banner Finance for only the current fiscal year.

This indicator cannot be changed during the fiscal year once encumbrances have been calculated and the NHPFIN1 process has been run. If this occurs, manual intervention through journal vouchers is required to adjust Finance records.

Note

If your institution does not use multi-year encumbering, selecting the above check box without selecting the **Encumber Multi Year Labor** check box on the Research Accounting Fund Maintenance Form (FRMFUND) does not have any effect on encumbrance calculations or feeds to finance. In this case, encumbrance amounts for only the current fiscal year will be fed to Banner Finance. ■

Refer to the online help of Banner Human Resources for more information on the NTRINST form.

Step 3: Process Encumbrance Calculations

To associate grant information from Banner Finance with fund codes used on labor distributions in Banner Human Resources and Position Control, and calculate encumbrances, perform the following steps:

10. On the Employee Jobs Form (NBAJOBS):

10.1. Enter new jobs or change job information for employees.

10.2. (Optional) Enter an earlier override date for the **Encumbrance Override End Date** instead of the **Budget Period End Date**, **Project End Date**, or **Fund Termination Date**, when calculating multiple year encumbrance amounts.

Dates related to grants identified with a multiple year encumbering fund on the job labor distribution are displayed in the following order of priority:

- First from the Budget Period dates on the Research Accounting Fund Maintenance Form (FRMFUND).
- If the Budget Period Dates are not available, the Project dates are used instead.
- If the Fund has been terminated prior to the Budget Period End Date, or Project End Date if applicable, then that value is displayed.

Date field labels change depending on what is selected from Banner Finance.

Note

Grant data is related to Fund codes used on the labor distribution. So, if the same fund is used for multiple labor distribution records on the same Effective Date, the same set of rules (i.e. Override End Date) apply for all calculations relating to that fund. Therefore, if you enter a different **Encumbrance Override End Date** for a different FOAPAL within the same effective date for the same fund, the following message is displayed:

**ERROR* All Encumbrance Override End Dates must be the same for Fund XXXX Effective Date, DD-MON-YYYY.* ■

See the online help of NBAJOBS or page [133](#) of the release guide for more information on dates and the Encumbrance Override End Date.

See page [141](#) for more information on encumbrance calculations.

See page [183](#) for tips on Troubleshooting.

11. Run the Encumbrance Maintenance Process (NBPENCM).

All encumbrance processing has been removed from the Budget Maintenance Process (NBPBUDM) and placed into a new Encumbrance Maintenance Process (NBPENCM). If the Fringe Chargeback Method is used, the NBPBUDM process must be run before NBPENCM.

For more details on NBPBUDM and NBPENCM processes, refer to the [“Changed Report and Processes” on page 173](#) of the release guide.

12. Run the Finance Extract Process (NHPPIN1).

This process checks the **Feed Future Encumbrance to Finance** indicator on the Position Control Installation Rules Form (NTRINST), extracts the correct To Post amounts, assigns item numbers, and updates the following: position encumbrance data, job labor distribution history, and NHRFINC (a temporary table) and the NHRDIST table.

13. Run the Finance Interface Report (NHPPIN2).

This process creates the feed to Finance transactions, by populating the GURFEED table and updates the Interface flag, pay history, and the Feed Document number.

14. (Optional) Review the records on the Organization Payroll Distribution Report (NHRDIST), or the alternate inquiry forms: NHIEDST and NHIDIST.

15. Finally, interface with Banner Finance by running the following processes:

- Finance Feed Sweep Process (FURFEED)
- Interface Process (FGRTRNI)
- Transaction Error Report (FGRTRNR)

Refer to the *Banner Finance User Guide* for more details regarding Banner Finance reports and processes.

Changed Forms

Employee Jobs Form (NBAJOBS)

The Employee Jobs Form (NBAJOBS) has been modified to support multiple year encumbering functionality as follows:

- The Base Job window has been modified to display encumbrance information for current and future years as shown below.
- The Job Labor Distribution window has been modified to display encumbrance information with regard to a specific job labor distribution.
- The Job Assignment BPI has been modified to incorporate encumbrance calculations and logic within to support overall Base Job encumbrance calculations.

For more details, refer to the *API Reference Guide* of Banner Human Resources Release 8.0.

Employee Jobs NBAJOBS 8.0

ID: B80100 Maya Corrigan
Position: A00012 Suffix: 01
Last Paid Date: 31-MAR-2007
Query Date: 07-AUG-2006

Base Job Job Detail Payroll Default Deferred Pay Miscellaneous Excluded Deductions/... Default Earnings Work Schedules Job Labor Distribution

Begin Date: 07-AUG-2006 End Date: Job Type: Primary

IPEDS Reporting Indicator

COA: B Accrue Leave Civil Service

Probationary Data
Probationary Period: Probationary Begin Date: Probationary End Date:

Increase MM and DD: Eligible Date: Deferred Balance: 0.00

Contract Information
Contract Start: Contract End: Total Contract Hours:

Fringe Encumbrance
Current Fiscal Year: Future Years: Total Encumbrance: 0.00

Salary Encumbrance
Total Encumbrance Hours: Current Fiscal Year: 63,350.90
Future Years: Total Encumbrance: 63,350.90

Base Job Window

Three new blocks have been added to the Base Job window, namely:

- Salary Encumbrance
- Fringe Encumbrance
- Contract Information

Base Job encumbrance calculations are performed at the job level, only on those records that have an effective date in the current fiscal year. The BPIs calculate the:

- Current fiscal year encumbrance amount
- Future fiscal year encumbrance amount
- Update the base job encumbrance amount
- Set the Encumbrance Change indicator

The Employee Jobs Form (NBAJOBS) updates the Base Job encumbrance field values when a job is created, a change is made to the contract date, salary, or labor distribution.

Note

When a job is first assigned, the labor distributions default from the Position Budget Form (NBAPBUD), and the Base Job encumbrance is calculated upon the initial Save. If you then change labor distributions from the defaulted values, the Base Job encumbrance amounts will not be recalculated until you run the NBPENCM process. ■

Field	Description
The Salary Encumbrance block displays the following information.	
Total Encumbrance Hours	Enter the total hours contracted to be paid in the active fiscal year. It is the sum of the job detail encumbrance hours for the currently active fiscal year. Enter this information only if the Salary Encumbrance Method field is set to <i>Hours Input</i> on the Employee Class Rules Form (PTRECLS). Note: The Total Encumbrance Hours must not exceed the Total Contract Hours .
Current Fiscal Year	Displays the total salary encumbrance amount of the job for the current <i>Active</i> fiscal year.
Future Years	Displays the total salary encumbrance amount of the job for the period <i>beyond</i> the current <i>Active</i> fiscal year.

Field	Description
Total Encumbrance	Displays the sum of the salary encumbrance amounts for the Current Fiscal Year and Future Years .

The Fringe Encumbrance block displays the following information.

Current Fiscal Year	Displays the fringe encumbrance amount of the job for the current <i>Active</i> fiscal year.
Future Years	Displays the total fringe encumbrance amount of the job for the period <i>beyond</i> the current <i>Active</i> fiscal year.
Total Encumbrance	Displays the sum of the fringe encumbrance amounts for the Current Fiscal Year and Future Years .

The Contract Information block displays the Contract Dates and Total Contract Hours. The Contract Dates are used to calculate salary encumbrances and process deferred pays for employees when contracts do not span an entire 12-month period.

Contract Start and End Dates are used in grant related multi-year encumbrance calculations and will be projected into the future using the same day and month, but advancing the years.

If Contract Dates span more than one fiscal year, the fiscal year end date will be used to calculate the current encumbrance amounts. However, the remaining period would be calculated for the future encumbrance amounts as well. A projected Contract Start Date will not begin in a period that would overlap with the portion of the contract extending past the Active fiscal year end date.



Warning

Contract Dates are significant only for the encumbering process. Do not use this to track the actual work period. ■

Start Date	Enter the start date of the contract.
End Date	Enter the end date of the contract.
Total Contract Hours	The total number of hours in the contract regardless of the fiscal year range.

So, when a contract spans across multiple fiscal years and the Budget Roll for the position is set to *Remaining*, the Mass Salary Table Update Process (NBPMASS) uses the **Total Contract Hours** and the **Total Encumbrance Hours** to calculate the balance rolled forward for Contract Hours.

Date Display Hierarchy in the Encumbrance Information Block

For date display, the following hierarchy or preference is observed:

- The Budget Period Start and End Dates on FRMFUND if available.
- If the budget dates are not available, the Project Start and Project End Date are displayed.
- The Fund Termination Date on FTMFUND for the grant fund, if available, is compared against the selected Budget Period End or Project End Date. If the Fund Termination Date is earlier, it is displayed on NBAJOBS.
- If no dates exist on the Finance forms, the NBAJOBS Grant Date fields will not be populated, and the encumbrance calculations will be processed within the Active fiscal year.

Only Finance related dates are displayed in the Encumbrance Information block on NBAJOBS. These field labels change depending on the source of the Begin and End dates.

The Encumbrance Information block displays data related to the last run of the Encumbrance Maintenance Process (NBPENCM) for a specific FOAPAL. All fields are for display only, except for the **Encumbrance Override End Date**, and the **Grant Detail** icon link to FRAGRNT.

Field	Description
Encumbrance Number	Displays the encumbrance number assigned to the FOAPAL. The value of this field is drawn from NBRJLBD_ENCD_NUM.
Encumbrance Sequence	Displays the encumbrance sequence number assigned to the unique FOAPAL. The value of this field is drawn from NBRJLBD_ENCD_SEQ_NUM.
Latest Recast Date	Displays the last date that the encumbrance information was recast by the Encumbrance Maintenance Process (NBPENCM).
Last Calculated Date	Displays the last date that the encumbrance calculations were processed by the Encumbrance Maintenance Process (NBPENCM). This relates to the System Date when the process was run.

Field	Description
Grant OR Fund	<p>Displays the Grant code from the Grant Maintenance Form (FRAGRNT) if the fund used in the FOAPAL string is associated with a grant for the specific job labor distribution record.</p> <p>OR</p> <p>Displays the Fund code from (FTMFUND) if the fund used in the FOAPAL string is not associated with a grant for the specific job labor distribution record.</p> <p>The system displays a description of the selected code.</p>
Grant Detail	<p>This icon is only enabled if the fund is associated with a grant.</p> <p>Click Grant Detail to access the Grant Maintenance Form (FRAGRNT) and populate the Grant field from NBAJOBS in the Key block of FRAGRNT.</p> <p>If you click the icon, but do not have Finance security access to the FRAGRNT form, the following message is displayed:</p> <p><i>*ERROR* User <name> not authorized to access FOQMENU.</i></p>
Budget Start Date OR Project Start Date	<p>The Budget Start Date is displayed only if a Fund is associated with a Grant.</p> <p>Displays the Grant Budget Period Start Date from the Research Accounting Fund Maintenance Form (FRMFUND) which is less than or equal to the Last Calculated Date on NBAJOBS.</p> <p>If the Last Calculated Date does not exist, the system selects the effective-dated record from the Research Accounting Fund Maintenance Form (FRMFUND) that is less than or equal to the System Date.</p> <p>If the Budget Period Start Date is not populated, the Project Start Date from the Grant Maintenance Form (FRAGRNT) is displayed.</p> <p>If Begin Dates do not exist on either the Research Accounting Fund Maintenance Form (FRMFUND) or the Grant Maintenance Form (FRAGRNT), no date is displayed for the Budget Start Date.</p> <p>The field labels change according to the source of the information.</p>
Encumber Multi Year Labor	<p>Displays the value from the FRVFUND_ENC_MULT_YR_IND on a new record, or NBRJLHS_ENC_MULT_YR_IND on a processed record.</p>

Field	Description
Budget End Date OR Fund Termination Date OR Project End Date	<p>Displays the earliest date from among the:</p> <ul style="list-style-type: none"> • Budget Period End Date on the Research Accounting Fund Maintenance Form (FRMFUND) that is less than or equal to the Last Calculated Date on NBAJOBS • Termination Date on the Fund Code Validation Form (FTVFUND) that is less than or equal to the Last Calculated Date on NBAJOBS. <p>If the Last Calculated Date does not exist, the System Date is used.</p> <p>If the Budget End Date does not exist, the earliest date from among the:</p> <ul style="list-style-type: none"> • Project End Date from the Grant Maintenance Form (FRAGRNT) • Fund Termination Date on the Fund Code Validation Form (FTVFUND) that is less than or equal to the Last Calculated Date. <p>If none of these dates exist, no date is displayed for the Budget End Date.</p> <p>The field labels change according to the source of the information.</p>

Field	Description
Encumbrance Override End Date	<p data-bbox="625 254 1377 390">Enter the Encumbrance Override End Date to restrict the end of the encumbrance calculation to an earlier date than the Budget Period End, Fund Termination Date, or Project End Dates for grant related funds.</p> <p data-bbox="625 411 1377 516">For example, the Budget End Date is 30-SEP-2008. But, if you want the encumbrance calculation to stop at the end of the fiscal year, enter 30-JUN-2008.</p> <p data-bbox="625 537 1377 747">A new effective-dated record must be entered to update the Encumbrance Override End Date if the existing labor distribution effective-dated record is prior to the Last Paid Date. When creating a new effective-dated labor distribution, the existing Encumbrance Override End Date will be copied forward along with the labor distribution FOAPAL.</p> <p data-bbox="625 768 1377 905">The Encumbrance Override End Date is captured into the history tables and can be viewed on the Labor Distribution Change History Form (NBIJLHS). This date is not affected by any changes made to Finance dates listed above.</p> <p data-bbox="625 926 1377 1014">Note: When calculating encumbrance amounts, the End Date will be restricted by the last Payroll Calendar Rules record. This is existing functionality.</p>

Edits for the Encumbrance Override End Date

The following date edits have been added:

- The Encumbrance Override End Date entered must be equal or greater than the Active fiscal year begin date. Otherwise, the following error message is displayed:
**ERROR* Encumbrance Override End Date entered, DD-MON-YYYY, must be equal to or greater than fiscal year begin date.DD-MON-YYYY, for Fund XXXX.*
- If the Encumbrance Override End Date is not within defined payroll calendar dates, the following warning message is displayed:
**WARNING* Payroll Calendar records missing for Encumbrance Override End Date, DD-MON-YYYY, on Job Labor Distribution, Fund XXXX.*
- The **Encumbrance Override End Date** field is only applicable to multiple year encumbering. Otherwise, the following error message will be displayed if an override date is entered on a non multi-year FOAPAL:
Override End Date only allowed for multi-year records.

- Grant data is related to Fund codes used on the labor distribution. If the same Fund/Grant is used for multiple labor distribution records on the same Effective Date, the same set of rules (i.e. override date) will apply for all of the calculations relating to that Fund/Grant. Therefore, if a different Encumbrance Override End Date is entered for a different record within the same Effective Date for the same Fund/Grant, the following message will be displayed:

**ERROR* All Encumbrance Override End Dates must be the same for Fund XXXX Effective Date DD-MON-YYYY.*

where

DD-MON-YYY represents the Effective Date and

XXXX represents the Fund Code for the invalid record

Examples of Encumbrance Override End Date

Example 1

If there are multiple labor distribution records for one effective date with the same Fund and you enter an Encumbrance Override End Date in only one of those records, when the record is saved, that date will default into the other null values:

2210-11001-6121-20 Date1 entered

2210-12223-6110-20 Null (defaults Date1 upon save)

2210-33204-6112-20 Null (defaults Date1 upon save)

Example 2

If there are multiple labor distribution records for one effective date with the same Fund and you enter one Encumbrance Override End Date in the first record and a different date in one of the other records, an error message will be displayed when the record is saved:

**ERROR* All Encumbrance Override End Dates must be the same for Fund XXXX Effective Date DD-MON-YYYY.*

Example 3

If an existing effective-dated record with multiple labor distributions with the same Fund is to be updated to a new effective-dated record, the previous records are copied forward. If you update only one of the Encumbrance Override End Dates for that specific Fund, an error message will be displayed:

**ERROR* All Encumbrance Override End Dates must be the same for Fund XXXX Effective Date DD-MON-YYYY.*

In this instance, remove the existing Encumbrance Override End Dates and save the record before entering a new date.



Tip

Also see [“Troubleshooting Tips” on page 183](#) of the release guide. ■

Employee Job History Form (PEIJHIS)

The Employee Job History Form displays all changes in the job history of each employee. This form has been modified as follows:

- The form now captures a history of salary encumbrance information, fringe encumbrance information and contract information in the Base Job window. Accordingly, new blocks have been added to encapsulate this information.
- New fields have been added and existing fields have been renamed and/or relocated in the:
 - Base Job Window
 - Job Detail Window
 - Payroll Window
- Tab navigation has been added to readily access information in each window.
- The **Capture Date and Time** field has been moved outside the Key block of the form to provide better clarity with regard to the information being viewed. The displayed date and time change in accordance to the window being viewed.

For detailed field descriptions, refer to the Online Help of Banner Human Resources 8.0.

Base Job Window

The Base Job window has been modified to reflect the associated changes on the Employee Jobs Form (NBAJOBS) as shown below. Access this window by selecting the *Base Job* tab or option from the Options menu.

The screenshot shows the 'Employee Job History PEDHIS 8.0' window. At the top, there are input fields for ID (B80100), Position (A00012), and Name (Maya Corrigan). A 'Query Date' field is set to 06-AUG-2007. Below this, a 'Capture Date and Time' field shows 25-JUL-2007 02:44:52 PM and a 'User ID' field shows LNGUYEN. The main area has three tabs: 'Base Job' (selected), 'Job Detail', and 'Payroll'. Under 'Base Job', there are several sections:

- General Job:** Includes fields for Begin Date (07-AUG-2006), End Date, Job Type (P), COA (B), Increase MM/DD, Eligible Date, Deferred Balance (0.00), Accrue Leave (Y), and Civil Service (N).
- Probationary Data:** Includes Probationary Period, Probationary Begin Date, and Probationary End Date.
- Contract Information:** Includes Contract Start Date, Contract End Date, and Total Contract Hours.
- Salary Encumbrance:** Shows Current Fiscal Year (63,350.90), Future Years, Total Encumbrance (63,350.90), and Total Encumbrance Hours.
- Fringe Encumbrance:** Shows Current Fiscal Year (0.00), Future Years, and Total Encumbrance (0.00).

Field	Description
-------	-------------

The Salary Encumbrance block displays the following information:

Current Fiscal Year	Displays the total salary encumbrance amount of the job for the current <i>Active</i> fiscal year.
Future Years	Displays the total salary encumbrance amount of the job for the period <i>beyond</i> the current <i>Active</i> fiscal year.
Total Encumbrance	Displays the sum of the Current Fiscal Year and Future Years salary encumbrance amounts.

Field	Description
Total Encumbrance Hours	<p>Displays the total hours contracted to be paid in the active fiscal year. It is the sum of the job detail encumbrance hours for the currently active fiscal year.</p> <p>This information is displayed only if your institution encumbers salary by the Hours method, and the Salary Encumbrance Method field is set to <i>Hours Input</i> on the Employee Class Rules Form (PTRECLS).</p> <p>Note: The Total Encumbrance Hours must not exceed the Total Contract Hours.</p>

The Contract Information block displays the contract dates and the total contract hours. The contract dates are used to calculate salary encumbrances and process deferred pays for employees when contracts do not span an entire 12-month period.

Note: Contract dates are significant only for the encumbering process. Do not use this to track the actual work period.

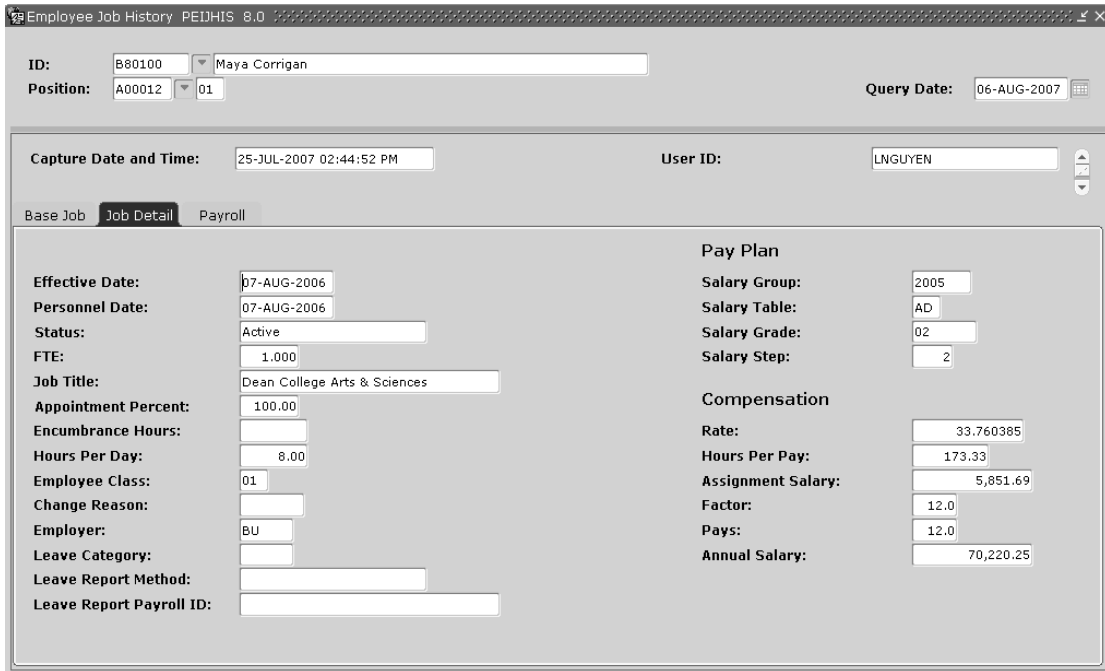
Start Date	Displays the start date of the contract.
End Date	Displays the end date of the contract.
Total Contract Hours	<p>Displays the total number of hours in the contract regardless of the fiscal year range.</p> <p>So, when a contract spans across multiple fiscal years and the Budget Roll for the position is set to <i>Remaining</i>, the Mass Salary Table Update (NBPMAS) process uses the Total Contract Hours and the Total Encumbrance Hours to calculate the balance rolled forward for contract hours.</p>

The Fringe Encumbrance block displays the following information.

Current Fiscal Year	Displays the fringe encumbrance amount of the job for the current <i>Active</i> fiscal year.
Future Years	Displays the total fringe encumbrance amount of the job for the period <i>beyond</i> the current <i>Active</i> fiscal year.
Total Encumbrance	Displays the sum of the fringe encumbrance amounts for the Current Fiscal Year and Future Years .

Job Detail Window

The Job Detail window displays the employee's history with regard to the Job Effective Date, Hours of Pay, salary information and compensation details as shown below. Access this window by selecting the *Job Detail* tab or option from the Options menu.



Employee Job History PEIDHIS 8.0

ID: B80100 Maya Corrigan
Position: A00012 01
Query Date: 06-AUG-2007

Capture Date and Time: 25-JUL-2007 02:44:52 PM
User ID: LNGUYEN

Base Job **Job Detail** Payroll

Effective Date:	07-AUG-2006	Pay Plan	
Personnel Date:	07-AUG-2006	Salary Group:	2005
Status:	Active	Salary Table:	AD
FTE:	1.000	Salary Grade:	02
Job Title:	Dean College Arts & Sciences	Salary Step:	2
Appointment Percent:	100.00	Compensation	
Encumbrance Hours:		Rate:	33.760385
Hours Per Day:	8.00	Hours Per Pay:	173.33
Employee Class:	01	Assignment Salary:	5,851.69
Change Reason:		Factor:	12.0
Employer:	BU	Pays:	12.0
Leave Category:		Annual Salary:	70,220.25
Leave Report Method:			
Leave Report Payroll ID:			

Payroll Window

The Payroll window displays the employee's details relative to the time sheet details, deferred compensation information, and supervisor information as shown below. Access this window by selecting the *Payroll* tab or option from the Options menu.

Employee Job History PEDHIS 8.0

ID: B80100 Maya Corrigan
Position: A00012 01
Query Date: 06-AUG-2007

Capture Date and Time: 25-JUL-2007 02:44:52 PM
User ID: LNGUYEN

Base Job Job Detail **Payroll**

Time Sheet COA: B
Time Sheet Organization: 11001
Time Entry Method: Payroll Time Entry
Time Entry Type: Pay Period Time Sheet
Payroll ID: MN
Shift: 1
Time In and Out: N
Longevity:
Premium Pay:

Deferred Pay
Deferred Pay:
Salary Per Pay: 5,851.69
Factor:
Pays:
Deferred Per Pay: 0.00

Miscellaneous
Supervisor ID: B80105
Supervisor Name: Kennard Nash
Supervisor Position: A00005
Supervisor Suffix: 01
Worker's Compensation:
Job Location:
EEO Location:
School:

Employee Status Change Form (PEAESCH)

The Employee Status Change Form enables you to change an employee's status quickly and efficiently. You can use this form to terminate an employee, place an employee on extended leave, reactivate an employee who is currently on leave, or change the employee's status on all related records or only selected records.

For 8.0, tab navigation has been added to this form. Accordingly the following windows of the form can be accessed via their corresponding tabs, namely:

- Job Window
- Deduction Window
- Encumbrance Window

For multi-year encumbering, two new blocks have been added to the Encumbrance tab or window as shown below:

- Salary Encumbrance Block
- Contract Information Block

Field	Description
-------	-------------

The Salary Encumbrance block displays the following information:

Current Fiscal Year	Displays the total salary encumbrance amount of the job for the current <i>Active</i> fiscal year.
Future Years	Displays the total salary encumbrance amount of the job for the period <i>beyond</i> the current <i>Active</i> fiscal year.
Total Encumbrance	Displays the sum of the Current Fiscal Year and Future Years salary encumbrance amounts.

Field	Description
Total Encumbrance Hours	<p data-bbox="639 258 1373 352">Displays the total hours contracted to be paid in the active fiscal year. It is the sum of the job detail encumbrance hours for the currently active fiscal year.</p> <p data-bbox="639 380 1373 474">This information is displayed only if the Salary Encumbrance Method field is set to <i>Hours Input</i> on the Employee Class Rules Form (PTRECLS).</p> <p data-bbox="639 501 1373 562">Note: The Total Encumbrance Hours must not exceed the Total Contract Hours.</p>

The Contract Information block displays the contract dates and the total contract hours. The contract dates are used to calculate salary encumbrances and process deferred pays for employees when contracts do *not* span an entire 12-month period.

Note: Contract dates are significant only for the encumbering process. Do not use this to track the actual work period.

Start Date	Enter the start date of the contract.
End Date	Enter the end date of the contract.
Total Contract Hours	<p data-bbox="639 936 1373 997">The total number of hours in the contract regardless of the fiscal year range.</p> <p data-bbox="639 1024 1373 1192">So, when a contract spans across multiple fiscal years and the Budget Roll for the position is set to <i>Remaining</i>, the Mass Salary Table Update Process (NBPMASS) uses the Total Contract Hours and the Total Encumbrance Hours to calculate the balance of contract hours.</p>

Labor Distribution Change History Form (NBIJLHS)

The Labor Distribution Change History Form (NBIJLHS) enables you to query and view job labor distribution changes associated with a specific employee and job assignment on the Employee Jobs Form (NBAJOBS).

This form has been modified to capture any changes made to each effective dated labor distribution record with regard to multi-year encumbering. All fields are for display only.

Job Labor Distribution Changes Block

The Job Labor Distribution Changes block displays the Effective Date that was captured from the NBAJOBS Labor Distribution record along with a Change Reason. Entries are also inserted when the NBPENCM and NHPFIN1 processes are run.

Note

When viewing FOAPAL records related to the NHPFIN1 record, the FOAPAL from the last record processed will display in the Job Labor Distribution Detail Block. Therefore, if the fringe or fringe residual was processed last by NHPFIN1, then the associated FOAPAL for fringe will display instead of the actual salary FOAPAL. This is existing functionality. ■

Job Labor Distribution Detail Block

The Job Labor Distribution Detail block displays the FOAPAL components, and the related captured information in the system (**Capture Date and Time**). With regard to encumbrance calculations, the following information is displayed

Field	Description
Latest Recast Date	Displays the last date that encumbrance information was recast by the Encumbrance Maintenance Process (NBPENCM) for the specific effective dated labor distribution record.
Grant OR Fund	Displays the Grant code and description if the fund in the FOAPAL distribution is associated with a grant. This field is displayed only if Banner Finance is installed. OR Displays the Fund code and description corresponding to a FOAPAL distribution. The Fund is dynamically displayed when it is not associated with a Grant when Banner Finance is installed. If multiple effective-dated records exist on the Fund Code Validation Form (FTVFUND), the system selects the record which is less than or equal to the System Date.

Field	Description
Encumber Multi Year Labor	<p>Displays the value of the indicator for a specific grant and fund combination based on the Last Calculated Date for the history record being viewed, from the Finance Research Accounting Fund Maintenance Form (FRMFUND) in Banner Finance.</p> <p>If the Last Calculated Date is not available, then the effective dated record on FRMFUND that is less than or equal to the System Date is used.</p>
Encumber Override End Date	Displays the Encumbrance Override End Date for the appropriate effective dated record being viewed.

Encumbrance to Post Tab

The Encumbrance to Post tab provides the overall Total Encumbrance amount that will transition from Banner Human Resources to Banner Finance for a particular FOAPAL associated with a specific employee and job assignment. The feeding of **Future To Post** amounts to Finance is dependent on the **Feed Future Encumbrance to Finance** indicator on NTRINST and will be selected appropriately by the NHPFIN1 process. Once the NHPFIN1 process is run, all **To Post** amounts will be set to zero.

This tab displays the current and future encumbrance amounts for salary, fringe and residual fringe, for the current active year and future fiscal years (if multi-year encumbering is used). These fields show the encumbrance amounts calculated by the Encumbrance Maintenance Process (NBPENCM), and also the To Post amounts for a specific FOAPAL and effective-dated labor distribution record.

Labor Distribution Change History NBDLHS 8.0
 ID: BEBMY0003 Carlton Bates Position: BEBAMB 00 As of Date: 01-JUL-2007

Job Labor Distribution Changes
 Effective Date Change Reason
 >> 01-JUL-2007 NHPFIN1 Encumbrance amount posted:Change to existing Record
 01-JUL-2007 NBPENCM encumbrance calculation: change to existing record.

Job Labor Distribution Detail

Percent	COA	Fund	Orgn	Account	Program	Activity	Location	Project	Cost
50		1110	11001	6121	20				

 Capture Date and Time: 14-DEC-2007 19:08:18 Fund: 1110 General Education Fund
 Encumbrance Number: PR080001 Encumber Multi Year Labor
 Encumbrance Sequence: 148 Encumbrance Override End Date:
 Latest Recast Date: 18-NOV-2007

Encumbrance To Post Salary Transaction Detail

	Current Encumbrance	Current Encumbrance to Post	Future Encumbrance	Future Encumbrance to Post
Salary:	12,460.23	-1,159.09	0.00	0.00
Fringe:	1,246.02	-115.91	0.00	0.00
Residual:	0.00	0.00	0.00	0.00

Field	Description
Salary, Current Encumbrance	Displays the salary encumbrance amount allocated for the current fiscal year.
Salary, Current Encumbrance to Post	Displays the salary encumbrance entry to post to Banner Finance for the current fiscal year via the NHPFIN1/FIN2 processes.
Salary, Future Encumbrance	Displays the salary encumbrance that is allocated beyond the current fiscal year.
Salary, Future Encumbrance to Post	Displays the salary encumbrance entry to post to Banner Finance for the future fiscal year via the NHPFIN1/FIN2 processes. Note: All encumbrance amounts will be posted within the current active fiscal year and period. No posting will be done to future fiscal years.
Fringe, Current Encumbrance	Displays the fringe encumbrance amount for the current fiscal year.
Fringe, Current Encumbrance to Post	Displays the fringe encumbrance entry to post to Banner Finance for the current fiscal year via the NHPFIN1/FIN2 processes.
Fringe, Future Encumbrance	Displays the fringe encumbrance amount allocated beyond the current fiscal year.

Field	Description
Fringe, Future Encumbrance to Post	<p>Displays the fringe encumbrance entry to post to Banner Finance for the future via the NHPFIN1/FIN2 processes.</p> <p>Note: All encumbrance amounts will be posted within the currently active fiscal year and period. No posting will be done to future fiscal years.</p>
Residual, Current Encumbrance	Displays the fringe residual encumbrance amount for the current fiscal year
Residual, Current Encumbrance to Post	Displays the fringe residual encumbrance entry to post to Banner Finance for the current fiscal year via the NHPFIN1/FIN2 processes.
Residual, Future Encumbrance	Displays the fringe residual encumbrance amount allocated beyond the current fiscal year.
Residual, Future Encumbrance to Post	<p>Displays the fringe residual encumbrance entry to post to Banner Finance for the future fiscal year via the NHPFIN1/FIN2 processes.</p> <p>Note: All encumbrance amounts will be posted within the currently active fiscal year and period. No posting will be done to future fiscal years.</p>

Salary Transaction Detail Tab

The Salary Transaction Detail tab provides detailed information on how the total encumbrance amount is calculated. This tab shows each distinct component of the encumbrance calculation that totals up to the salary encumbrance amount on the Encumbrance To Post tab. Information displayed is related to the **Capture Date and Time** for the specific FOAPAL as shown below.

Each row shows each portion of the calculation and also provides the **End Date Reason** that a particular End Date was used in the relevant portion of the encumbrance calculation. These date fields are especially important in reviewing and analyzing multiple year encumbrance amounts in following what dates and amounts were used to make up the calculation.

Job Labor Distribution Change History NBIILHS 8.0

ID: BEBMY0003 Carlton Bates Position: BEBAMB 00 As of Date: 01-JUL-2007

Job Labor Distribution Changes

Effective Date	Change Reason
01-JUL-2007	NHPPFIN1 Encumbrance amount posted:Change to existing Record
>> 01-JUL-2007	NBPENCM encumbrance calculation: change to existing record.

Job Labor Distribution Detail

Percent	COA	Fund	Orgn	Account	Program	Activity	Location	Project	Cost
50	E	1110	11001	6121	20				

Capture Date and Time: 14-DEC-2007 19:08:18 Fund: 1110 General Education Fund
 Encumbrance Number: PR080001 Encumber Multi Year Labor
 Encumbrance Sequence: 148 Encumbrance Override End Date:
 Latest Recast Date: 18-NOV-2007

Encumbrance To Post **Salary Transaction Detail**

Labor Effective Date	Calculation End Date	Current Encumbrance	Future Encumbrance	Total Encumbrance	End Date Reason
01-JUL-2007	13-MAY-2008	12,460.23			Contract Ended.
14-MAY-2008		0.00	0.00	0.00	
Totals:		12,460.23	0.00		

Field	Description
Labor Effective Date	Displays the labor distribution effective date used in the specific component of the encumbrance calculation.
Calculation End Date	Displays the end date used in the specific component of the encumbrance calculation
Current Encumbrance	Displays the current fiscal year's encumbrance calculation component for the specified begin and end date.

Field	Description
Future Encumbrance	Displays the future encumbrance calculation component that represents the amount beyond the current fiscal year, for the specified begin and end date.
Total Encumbrance	Displays the sum of the Current and Future encumbrance amounts for the specified component.
End Date Reason	<p>Displays a description of the end date used in the specific component of the encumbrance calculation. Valid values are:</p> <p><i>Contract Ended</i> For non-multiple year records with a Contract End Date within the <i>Active</i> fiscal year</p> <p><i>End Date Override</i></p> <p><i>Grant Budget Ended</i></p> <p><i>Fund Terminated</i></p> <p><i>Grant Project Ended</i></p> <p><i>Job Ended</i></p> <p><i>Payroll Calendar Rule</i></p> <p><i>Fiscal Year Ended</i></p>
Totals	Displays the calculated sum of all component amounts in the particular column for that Effective Date and FOAPAL.

Position Control Installation Form (NTRINST)

A new check box, **Feed Future Encumbrance to Finance** has been added to this rule form as shown below. Use this indicator only if the institution uses multiple year encumbering to calculate future labor encumbrance amounts associated with grants.

This indicator cannot be changed during the fiscal year, once encumbrances have been calculated and the NHPFIN1 process is run. If a change is made, no backouts or adjustments of previously fed future encumbrance amounts will occur, nor will future amounts be recalculated and posted to Banner Finance. If this occurs, manual intervention through journal vouchers is required to adjust Finance records.

The screenshot shows the 'Position Control Installation Rules' window for NTRINST 8.0. It features three tabs: 'Base Rules', 'Electronic Approval', and 'Salary Planner'. The 'Base Rules' tab is active. The form includes the following fields and options:

- Location:** A dropdown menu set to 'United States'.
- Insert Job Detail Data Between Existing Records:** Radio buttons for 'Not Allowed' and 'Allowed' (selected).
- Probationary Period Units:** Radio buttons for 'Days' (selected) and 'Month'.
- Time Entry Rules:**
 - Time Entry Approval Category:** A dropdown menu set to 'TIME'.
 - Leave Report Approval Category:** A dropdown menu set to 'LEAVE'.
 - Return Time or Leave Sheet to Employee on Web for Correction**
- Finance Rules:**
 - COA:** A dropdown menu set to 'A'.
 - Validate Position Budget:** A dropdown menu set to 'Warning'.
 - Maximum Document Sequence Number:** A text input field containing '100'.
 - Create NHRDIST Records**
 - Encumbrance Recasting Indicator**
 - Feed Future Encumbrance to Finance**

Field

Description

Feed Future Encumbrance to Finance

Select this check box to feed future fiscal year encumbrance amounts to Banner Finance. Otherwise, encumbrance amounts will be fed to Banner Finance for only the *current fiscal year*.

Note: If your institution does not use multi-year encumbering, selecting the **Feed Future Encumbrance to Finance** check box without selecting the **Encumber Multi Year Labor** check box on the Research Accounting Fund Maintenance Form (FRMFUND) in Banner Finance will not have any effect on encumbrance calculations or the feed to Banner Finance. Encumbrance amounts for only the *current fiscal year* will be fed to Banner Finance.

Employee Distribution Inquiry Form (NHIEDST)

The Employee Distribution Inquiry Form (NHIEDST) provides payroll distribution data for the Employee ID, Category and time period entered in the Key block. Each line of data specifies the dollar amount distributed to the FOAPAL by earnings or deduction. The Home Organization displayed in the Key block is informational only, and does not determine what information is retrieved.

The search functionality of this inquiry form has been modified to retrieve any earnings and deduction records for funds associated with a grant. Accordingly, a new field, **Grant** has been added to the Key block of this form as shown below.

Field	Description
-------	-------------

Grant	Enter, or search and select a grant code.
-------	---

Search	List of Grant Codes Form (FRIGRNT) Grant Title Search Form (FRIKGNT)
--------	---

The system displays a description of the selected grant code.

The following message is displayed if Banner does not find a match for the entered Key block information: *Query caused no records to be retrieved. Re-enter.*

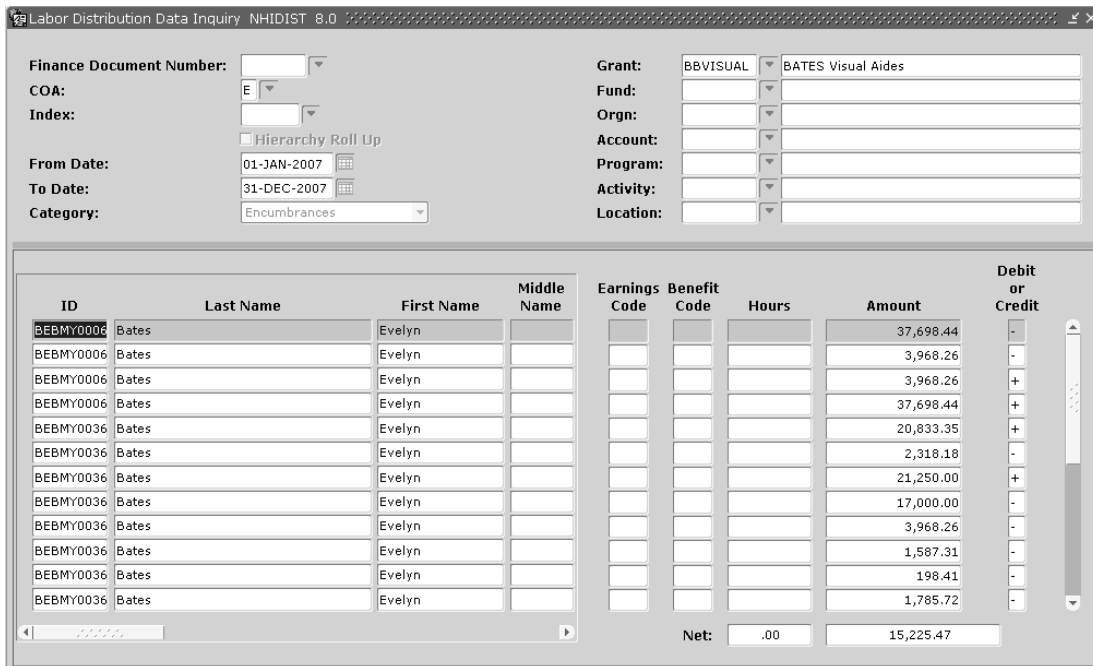
Labor Distribution Data Inquiry Form (NHIDIST)

The Labor Distribution Data Inquiry Form (NHIDIST) provides payroll distribution data for the Finance Document Number, Chart of Accounts, time frame and FOAPAL elements entered in the Key Block. The displayed information specifies the dollar amount distributed to the FOAPAL, earning and/or benefit by Employee ID.

Note

The Finance Document Number List of Values only provides a list of documents that currently exist in the GURFEED table, not yet interfaced to Banner Finance. Previously interfaced Finance Document Numbers must be known and entered into the field for use when querying records. ■

The search functionality of this inquiry form has been enhanced to provide query ability on grants in addition to FOAPAL values. Accordingly, a new field, **Grant** has been added to the Key block of this form as shown below. When a Grant value is entered, only records associated with the Fund connected to that Grant on the Fund Code Validation Form (FTVFUND) will be displayed.



ID	Last Name	First Name	Middle Name	Earnings Code	Benefit Code	Hours	Amount	Debit or Credit
BEBMY0006	Bates	Evelyn					37,698.44	-
BEBMY0006	Bates	Evelyn					3,968.26	-
BEBMY0006	Bates	Evelyn					3,968.26	+
BEBMY0006	Bates	Evelyn					37,698.44	+
BEBMY0036	Bates	Evelyn					20,833.35	+
BEBMY0036	Bates	Evelyn					2,318.18	-
BEBMY0036	Bates	Evelyn					21,250.00	+
BEBMY0036	Bates	Evelyn					17,000.00	-
BEBMY0036	Bates	Evelyn					3,968.26	-
BEBMY0036	Bates	Evelyn					1,587.31	-
BEBMY0036	Bates	Evelyn					198.41	-
BEBMY0036	Bates	Evelyn					1,785.72	-
Net:							.00	15,225.47

Field	Description
Grant	Enter, or search and select a grant code.
Search	List of Grant Codes Form (FRIGRNT) Grant Title Search Form (FRIKGNT)
	The system displays a description of the selected grant code.
	The following message is displayed if Banner does not find a match for the entered Key block information:
	<i>Query caused no records to be retrieved. Re-enter.</i>

Electronic Approval Usage Rules (NTRAUSG)

New seed data has been delivered for this form, to include the **Encumbrance Override End Date** from the new Encumbrance Information block of the Job Labor Distribution window of the Employee Jobs Form (NBAJOBS).

New seed data scripts, `nort1bd_080000_01.sql` and `nort1bd_080000_02.sql` have been delivered for this form. For more details, refer to the [“New Scripts” on page 198](#).

Electronic Personnel Action Form (NOAEPAF)

The Electronic Personnel Action Form (NOAEPAF) has been modified to add a new field on the Job Labor Distribution tab for the Encumbrance End Date that relates to the Encumbrance Override End Date on the Employee Jobs Form (NBAJOBS).

Grant data is related to Fund codes used on the labor distribution. If the same Fund is used for multiple labor distribution records on the same Effective Date and you try to enter a different Encumbrance End Date for a different FOAPAL within the same effective date for the same Fund, the following error message will be displayed:

**ERROR* All Encumbrance Override End Dates must be the same for Fund XXXX Effective Date DD-MON-YYYY.*

where,

XXXX represents the Fund Code

DD-MON-YYY represents the Effective Date for the invalid record.

Example 1

If there are multiple labor distribution records for one effective date with the same Fund and the User enters an Encumbrance Override End Date in only one of those records, when the EPAF record is submitted, that date will default into the other null values:

2210-11001-6121-20	Date1 entered
2210-12223-6110-20	Null (defaults Date1 upon save)
2210-33204-6112-20	Null (defaults Date1 upon save)

Example 2

If there are multiple labor distribution records for one effective date with the same Fund and you enter one Encumbrance Override End Date in the first record and a different date in one of the other records, the following error message will be displayed when the record is saved:

**ERROR* All Encumbrance Override End Dates must be the same for Fund XXXX Effective Date DD-MON-YYYY.*

Example 3

If an existing effective dated record with multiple labor distributions with the same Fund is to be updated to a new effective dated record, the previous records are copied forward, and you update only one of the Encumbrance Override End Dates for that specific Fund, the following error message will be displayed:

**ERROR* All Encumbrance Override End Dates must be the same for Fund XXXX Effective Date DD-MON-YYYY.*

These error messages will be displayed during the Submit process for the EPAF.

You may enter an Encumbrance Override End Date to restrict the end of the encumbrance calculation period. Edits will be performed to be sure that any Encumbrance End Date entered is greater than or equal to the Active fiscal year begin date and within an existing Payroll Calendar Rules (PTRCALN) form date range. If the value is not greater than or equal to the Active fiscal year begin date, then the following error message will be displayed:

**ERROR* Encumbrance Override End Date entered must be equal to or greater than fiscal year begin date, for Fund XXXX.*

XXXX represents the Fund Code for the invalid record.

When performing the Payroll Calendar Rules edit on the Encumbrance End Date, the Pay ID will be pulled from the NBAJOBS record value. If the Encumbrance End Date value is not within defined payroll calendar dates, the following warning message will be displayed:

**WARNING* Payroll Calendar records missing for Encumbrance Override End Date, DD-MON-YYYY, on Job Labor Distribution, Fund XXXX.*

where XXXX represents the Fund Code for the invalid record.

Labor distribution records created or updated on NOAEPAF, ESS EPAF or Salary Planner, will create new effective dated records with the entered Encumbrance Override End Date value.

Impact on Salary Planner

In the Salary Planner, the **Encumbrance Override End Date** field has been added to the following self-service pages:

- Account Distribution (bwpksdst.P_DispatchDist)
- Job Labor Distribution (bwpksdst.P_JobLaborDist)

For detailed information refer to the Employee Self-Service Release Guide, 8.0.

Impact on Self-Service EPAFs

The Electronic Personnel Action Form (EPAF) in Employee Self-Service has been modified to add a new field on the Account Distribution page for the **Encumbrance Override End Date** relating to the labor distribution on the Employee Jobs Form (NBAJOBS).

Impact on Faculty Load and Compensation

In the Faculty Load and Compensation (FLAC) module, the **Encumbrance Override End Date** field has been added to the following areas:

- The Extract Process (PEPFLAC) will extract an existing **Encumbrance Override End Date** only when the system extracts the labor distribution from an existing Job Assignment record, in which the Encumbrance Override End Date has previously been populated. This technique allows the job and labor distribution record to continue forward during a faculty reappointment.
- The Faculty Load and Compensation Upload process (PEPFCAP) will upload any pre-existing **Encumbrance Override End Date** with the labor distribution record. A new effective dated record will be created on NBAJOBS if the record previously came from a Job Labor Distribution with an Encumbrance Override End Date, and the Fund Code was not changed within the Faculty Load and Compensation pages. Changes to the **Encumbrance Override End Date** will need to be updated on the Employee Jobs Form (NBAJOBS).
- Within Employee Self-Service, the Faculty Load and Compensation module does not have a mechanism to enter or modify the Encumbrance Override End Date. Therefore, if a new or changed labor distribution requires an Encumbrance Override End Date, the record will need to be updated once it has been applied to NBAJOBS.

Two situations may require manual entry to the job after records have been uploaded.

- If a change is made to an existing fund, with an associated Encumbrance Override End Date, the date will be removed and no Encumbrance Override End Date will be uploaded in the new record on NBAJOBS.
- If a new FOAPAL record is created with a grant related fund, no Encumbrance Override End Date will be uploaded into the new record on NBAJOBS.

For detailed information refer to the Employee Self-Service Release Guide, 8.0.

Changed Object:Access Views

The following Object:Access Views have been modified for the multi-year encumbering enhancement.

Employee Profile (AP_EMPLOYEE_PROFILE)

The following new field has been added to the Employee Profile View.

Ref. No.	Attribute	Source Form	Source Attribute or Function Name
P2.246x	Future Salary Encumbrance	NBAJOBS	NBRBJOB_FUTURE_SALARY_ENC

Job Summary (AP_JOB_SUMMARY)

The following new field has been added to the Job Summary View.

Ref. No.	Attribute	Source Form	Source Attribute or Function Name
P3.112	Future Salary Encumbrance	NBAJOBS	NBRBJOB_FUTURE_SALAR_ENC



New Process

Encumbrance Maintenance Process (NBPENCM)

- Description** The Encumbrance Maintenance Process (NBPENCM) performs all encumbrance processing including modifications for multi-year encumbering. The process
- Checks the **Encumber Multi Year Labor** indicator on the Research Accounting Fund Maintenance Form (FRMFUND)
 - Recalculates the encumbrance amounts
 - Updates the Base Job if necessary
 - Applies the encumbrance amount across the individual labor distribution records for the job and
 - Creates the **To Post** amounts in history



Note

Encumbrance processing has been removed from the Budget Maintenance Process (NBPBUDM) and placed into the new Encumbrance Maintenance Process (NBPENCM). The NBPENCM process will only update the Base Job encumbrance fields in the following situations:

- When NOT using Recasting logic, OR
- When utilizing the Encumbrance Recast Method and the Recast date = Begin Date of the Active Fiscal Year

Processing Notes

The Encumbrance Maintenance Process checks the Installation Rules Form (NTRINST) to see if the **Encumber Recast Indicator** is checked. If so, it will look to Banner Finance for each record to see if the Fund is related to the Grant, and then if the **Encumber Multi Year Labor** indicator is checked.

The NBPENCM process also checks the Banner Finance records that have an Effective Date that is less than or equal to the **Recast Date**. The process selects the appropriate effective dated record and ignores future effective dated records.

Example

Recast Date = 01-JAN-2008

FRMFUND record < = 01-JAN-2008

If you change the Encumber Multi Year Labor value on the Research Accounting Fund Maintenance Form (FRMFUND), the next time you run the Encumbrance Maintenance Process (NBPENCM), it will perform the following actions using the Recasting method:

- Create encumbrance adjustments
- Process any future employee job effective-dated changes within the Active fiscal year.

When calculating multiple year encumbrances through either the Job Assignment BPI or NBPENCM process, no editing on the labor distribution percentage total being equal to 100% will be performed. For example, on a Job Labor Distribution with multiple FOAPAL records, one FOAPAL record may be calculated for the entire fiscal year, one FOAPAL record may be calculated for a portion of the fiscal year, and another FOAPAL record may be calculated across multiple fiscal years.

The following example shows how the FOAPAL percentages would be used in the calculation:

Encumbrance Calculations		
NBAJOBS	Current Fiscal Year	Future Fiscal Year
Initial%	Ending %	Ending %
33% Grant A (MYE) ended in Current FY	0%	0%
33% Grant B (MYE) continues beyond Current FY	33%	33%
34% Admin (Non-MYE)	34%	0%
100% Total	Not = 100%	Not = 100%

If a Grant ends within the current fiscal year in between NBAJOBS labor distribution effective dated records, and a labor distribution effective dated record does not exist to remove the ended grant related FOAPAL, a warning message will be returned from the Job Assignment BPI and the Encumbrance Maintenance Process. The warning message will only be returned if the Grant ends within the current fiscal year:

**WARNING* Grant Ended in the current fiscal year for %FUND_CODE% effective %EFFECTIVE_DATE%.*

For NBPENCM encumbrance calculations, the **Calculation Begin Date** is the greater date from the following:

- The first day of the fiscal year (NBBFISC_BEGIN_DATE).
- The **Job Begin Date** (NBRBJOB_BEGIN_DATE) on the Employee Jobs Form (NBAJOBS)
- The **Contract Begin Date** (NBRBJOB_CONTRACT_BEGIN_DATE) on the Employee Jobs Form (NBAJOBS), or
- If using the Recasting method, the **Recast Date** entered for the process parameter.

Similarly, the **Calculation End Date** for multi-year grant encumbering is the earliest of the following dates:

- The **Job End Date** (NBRBJOB_END_DATE)
- The **Contract End Date** (NBRBJOB_CONTRACT_END_DATE)
- The **Grant Budget Period End Date** (FRVFUND_BUDG_PRD_END_DATE), or the **Grant Project End Date** (FRBGRNT_PROJECT_END_DATE) if Budget Period End Date does not exist, or the **Fund Termination Date** (FTVFUND_TERM_DATE)
- The **Encumbrance Override End Date** (NBRJLBD_ENC_OVERRIDE_END_DATE),
- Fiscal Year End Date (NBBFISC_END_DATE) if the Budget Period End Date and Project End Date are NULL and the Job End Date, Contract End Date or Fund Termination Date do not exist or are beyond the end of the Active fiscal year.
- Payroll Calendar period end date (PTRCALN_END_DATE). Encumbrance calculations are limited by PTRCALN records. If a Grant is accounted for over five years, but the calendar rules for the job Pay ID are only set up for two years, the encumbrance calculation could be limited to the two years. This can affect both current and future calculations.

All transactions performed by the process are captured for display on the Labor Distribution Change History Form (NBIJLHS).

The Encumbrance Maintenance Process allows you to process a single Chart of Accounts or All Charts, when using the payroll liquidation method of encumbrance liquidation.

The display of the report includes a section for Future encumbrance amounts. If the following edits are met, then the Future encumbrance amounts will be printed:

1. The Position Control Installation Rules (NTRINST) is set to Encumbrance Recasting
2. The Fund is identified to Encumber Multi Year Labor on the Research Accounting Fund Maintenance (FRMFUND) record, based on the effective date <= Recast Date
3. The PTRECLS_SALARY_ENCUMBRANCE_IND is equal to S for System Calculated

The Encumbrance Maintenance Process (NBPENCM) has also been modified to use the Job BPI, Job Earnings BPI and Job Labor BPI. This feature addresses and completes RPE 1-1S0XIR. Additionally, two RPEs, CMS-RPE38587 and CMS-RPE3882 have also been completed. For more details refer to the [“Miscellaneous Enhancements” on page 261](#).

Parameters	Name	Description/Values	Required?	Default	Validation
01	Process Mode	The Encumbrance Maintenance Process (NBPENCM) can be run in two modes: Report (R) Encumbrance calculations are performed and displayed without making changes to the database tables. Process (P) All encumbrance calculations are applied to the database.	Yes	None	None
02	Chart of Accounts	Enter a chart of accounts code (COA) or specify none to select all charts. This is used in the payroll liquidation method.	Only if Recasting is not used.	None	FTVCOAS
03	Recast Chart of Accounts Code	Enter the Recast Chart of Accounts Code (COA)	Only if the Recasting indicator is set on the Installation Rules Form (NTRINST).	None	FTVCOAS
04	Recast Date	Enter the Recasting Fiscal Begin Override Date	Only if the Recasting indicator is set on the Installation Rules Form (NTRINST).	DD-MON-YYYY	FTVCOAS
05	Process All Pay IDs?	Indicate if all Pay IDs must be processed. Choices include: Y Yes, process all Pay IDs. N No, process specific Pay IDs	Only if the Recasting indicator is set on the Installation Rules Form (NTRINST).	Y (Yes)	None

Parameters	Name	Description/Values	Required?	Default	Validation
06	Recast Pay ID	Enter a specific Recast Pay ID.	Only if parameter 05, Process all Pay IDs? is set to Y, and the Recasting indicator is set on the Installation Rules Form (NTRINST).	None.	PTRPICT
07	Liquidate Entire Fiscal Year	Indicate if the entire fiscal year must be liquidated. Choices include: Y Yes, liquidates entire fiscal year. N No, does not liquidate the entire fiscal year.	Only if the Recasting indicator is set on the Installation Rules Form (NTRINST).	No	None

Sort Order

First by Chart of Accounts code, then by Employee Name.

Frequency

At the beginning of your fiscal year, and at other times as needed.

Data Source

NBBFISC	NBBPOSN	NBRBJOB	NBRJLBD	NBRJOBS	NBRPLBD	NBRPTOT
NTRFBEX	NTRFBIN	NTRFELD	NTRFINI	FTVFUND	FRVFUND	FRBGRNT

Report Format

Standard, horizontal report format

Report Sample—Encumbrance Maintenance Process (NBPENCM)

REPORT : NBPENCM

SUNGARDHE University
 Encumbrance Maint. Process
 Transactions Shown Have Not Been Applied To The Database

PAGE 1
 RUN DATE 30-JAN-2008
 RUN TIME 12:16 PM

Fiscal Year: 2006 Chart of Accounts: L Begin Date: 01-JUL-2005 End Date: 30-JUN-2006 Recast Date: 01-OCT-2005

Indicators In Effect For This Year And Chart

 Fringe Encumbrance Indicator : Yes
 Fringe Calculation Method Indicator: All
 Fringe Rate Override Indicator : No
 Fringe Rate Rules Change Indicator : No
 Perform fringe matching on FUND : Yes
 Perform fringe matching on ORGN : No
 Perform fringe matching on ACCT : No
 Perform fringe matching on PROG : No
 Perform fringe matching on ACTV : No
 Perform fringe matching on LOCN : No

ID	EMPLOYEE NAME	POSITION	SUFFIX	JOB BEGIN DATE										
BEBDM0010	Bates, Arya	BEBL01	00	01-OCT-2005										
TYPE	EFF DATE	FUND	ORGN	ACCT	PROG	ACTV	LOCN	PERCENT	SALARY AMOUNT	SALARY TO POST	FRINGE AMOUNT	FRINGE TO POST	FRINGE RATE	ENCUMBRANCE DOCUMENT SEQ
TABLE	01-OCT-2005	23001	11004	6113	20			100.00	56250.00	56250.00	4218.75	4218.75	7.50	PRO60001 1918
Installation Fringe Residual Not Covered By External Funding Sources:											1406.25	1406.25	2.50	
CURRENT SALARY/FRINGE TOTALS									56250.00	56250.00	4218.75	4218.75		
CURRENT FRINGE RESIDUAL TOTALS											1406.25	1406.25		
TABLE	01-OCT-2005	23001	11004	6113	20			100.00	262500.00	262500.00	19687.50	19687.50	7.50	PRO60001 1918
Installation Fringe Residual Not Covered By External Funding Sources:											6562.50	6562.50	2.50	
FUTURE SALARY/FRINGE TOTALS									262500.00	262500.00	19687.50	19687.50		
FUTURE FRINGE RESIDUAL TOTALS											6562.50	6562.50		
TOTAL SALARY/FRINGE TOTALS									318750.00	318750.00	23906.25	23906.25		
TOTAL FRINGE RESIDUAL TOTALS											7968.75	7968.75		

REPORT : NBPBUDM

SCT University
Budget Maintenance Process

PAGE 9
RUN DATE 28-SEP-2007
RUN TIME 11:43 AM

*** REPORT CONTROL INFORMATION ***

Parameter Name	Value	Source	Message
Parameter Seq No:	133533		
Process Mode:	R	Default	
Active/Working Budgets	A	Default	
COAS Code:	A	Default	
Fiscal Year:	2006	Default	
Print Lines/Page:	55	Default	
Record Count : 23	Number of Positions Processed		

Changed Report and Processes

Budget Maintenance Process (NBPBUDM)

The Budget Maintenance Process (NBPBUDM) has been modified to contain all functionality purely for budget processing relating to Fringe Charge Back. Encumbrance processing will now be performed by the new Encumbrance Maintenance Process (NBPENCM). For more details on the new process, refer to page [165](#) of this release guide.

Accordingly, the following changes have been made to the process:

- Report parameters have been modified to contain only budget-specific parameters as listed on the following page.
- The report fields and layout have been updated to remove encumbrance related information.

Parameters	Name	Description/Values	Required?	Default	Validation
01	Process Mode	<p>Mode of operation</p> <p>R Report mode. If you select this option, the system generates a report of pending transactions but does not change the database in any way. Select this option if you want to preview any updates before actually applying them.</p> <p>P Process mode. If you select this option, the system generates a report of pending transactions, then applies the updates to the database. The database update includes the writing of history records for tracking purposes.</p>	Yes	None	None
02	Active or Working Budgets	<p>Active or working budgets indicator. This parameter appears only if you entered <i>Y</i> at Budget Processing.</p> <p>A Calculate amounts for budgets designated as <i>active</i> in Status in the NBAPBUD Position Salaries Total Block.</p> <p>W Calculate amounts for budgets designated as <i>working</i> in Status in the NBAPBUD Position Salaries Total Block.</p>	Yes	None	None
03	Chart of Accounts Code	Chart(s) of Accounts to be used in budget selection. This is a repeating parameter.	Yes	None	FTVCOAS
04	Fiscal Year	Fiscal year to be used in budget selection.	Yes	None	Format must be YYYY or YY NBBFISC

Parameters <i>(con)</i>	Name	Description/Values	Required?	Default	Validation
05	Budget ID	Enter a Budget ID to process (only used if selecting Working Budgets).	No	None	FTVOBUD
06	Budget Phase	Budget phase to be used (in conjunction with budget ID, above) in selection of working budgets.	No	None	FTVOBPH

Sort Order

Budget Option: First by Chart of Accounts code, then by Position number

Data Source

NBBFISC NBBPOSN NBRBJOB NBRJLBD NBRJOBS
 NBRPLBD NBRPTOT NTRFBEX NTRFBIN NTRFELD NTRFINI

Frequency

Budget Option: At the beginning of your fiscal year, and at other times as needed.

Report Format

Standard, horizontal report format.

Report Fields	Name	Description
<i>Budget Option</i>	Position	Position to which this transaction has been applied
	Orgn	Organization associated with this position for purposes of this transaction
	ECLS	Employee class. In conjunction with the Chart of Accounts, this value directs the posting of fringe budgets and encumbrances.
	Begin	Date this position began as specified in the Position Block of the Position Budget Form (NBAPBUD)
	End	Date this position ends as specified in the Position Block of NBAPBUD.
	Salary Budget	Salary amount budgeted for this position in the Position Salaries Total Block of NBAPBUD.
	C	Chart of Accounts to which this transaction has been posted.
	FUND	Fund code to be used for labor distribution. This field appears only if Banner Finance is installed.
	ORGN	Organization code to be used for labor distribution. This field appears only if Banner Finance is installed.
	ACCT	Account code to be used for labor distribution. This field appears only if Banner Finance is installed.
	PROG	Program code to be used for labor distribution. This field appears only if Banner Finance is installed.
	ACTV	Activity code to be used for labor distribution. This field appears only if Banner Finance is installed.
	LOCN	Location code to be used for labor distribution. This field appears only if Banner Finance is installed.
	Percent	Labor distribution percentage.
	Effective	Effective date of this transaction
	Fringe Budget	Charge back fringe amount calculated according to the rules established on NTRFINI and NTRFBLD

Report	Name	Description
	Match	Type of Chart of Accounts and FOAPAL combination matched for purposes of this transaction.
	E	External match. This value indicates that a matching FOAPAL-Chart of Accounts combination was located in the External Funding Source Fringe Rate Definition block of NTRFBLD.
	I	Installation match. This value indicates that a matching FOAPAL-Chart of Accounts combination was located in the Installation Fringe Charge Back block of NTRFBLD.
	R	Residual match. When the Fringe Calc Indicator is set to A(II) and there is no installation match FOAPAL, the residual amount is posted to the FOAPAL established in the Fringe Charge Back Residual Labor Distribution Override on NBAPOSN.
	Rate	The Fringe Rate for the external funding source used in the calculation.

Report Sample— Budget Maintenance Process (NBPBUDM)

REPORT : NBPBUDM

SCT University
 Budget Maintenance Process
 Report of Budget Transactions
 Fiscal Year: 2006 Chart of Accounts: A Begin Date: 01-JUL-2005 End Date: 30-JUN-2006
 Active Budgets for Above Fiscal Year

RUN DATE 28-SEP-2007
 RUN TIME 11:43 AM

Indicators In Effect For This Year And Chart

Fringe Calculation Method Indicator: All
 Fringe Rate Override Indicator: No
 Perform fringe matching on FUND: No
 Perform fringe matching on ORGN: No
 Perform fringe matching on ACCT: Yes
 Perform fringe matching on PROG: No
 Perform fringe matching on ACTV: No
 Perform fringe matching on LOCN: No

Position:	ENRL01	Orgn:	A 270	ECLS:	01	Begin:	01-JUL-2005	End:	Salary Budget:	60000.00			
		C	FUND	ORGN	ACCT	PROG	ACTV	LOCN	Percent	Salary Budget			
		A	1000	270	5120	610			75.00	45000.00			
		A	2211	270	5120	610			25.00	15000.00			
Effective		C	FUND	ORGN	ACCT	PROG	ACTV	LOCN	Percent	Fringe Budget	Match	Rate	
01-JUL-2005		A	1000	270	5500	610			75.00	458.46	E	12.00	
01-JUL-2005		A	1011	220	5500	620			75.00	114.62	R	3.00	
01-AUG-2005		A	1000	270	5120	610			75.00	4941.54	E	12.00	
01-AUG-2005		A	1011	220	5500	620			75.00	1235.39	R	3.00	
01-JUL-2005		A	1000	270	5500	610			25.00	152.82	E	12.00	
01-JUL-2005		A	1011	220	5500	620			25.00	38.21	R	3.00	
01-AUG-2005		A	2211	270	5120	610			25.00	1647.18	E	12.00	
01-AUG-2005		A	1011	220	5500	620			25.00	411.80	R	3.00	
Total Fringe Budget:										9000.02			
Position:	ENRL02	Orgn:	A 181	ECLS:	03	Begin:	01-JUL-2005	End:	Salary Budget:	20080.00			
		C	FUND	ORGN	ACCT	PROG	ACTV	LOCN	Percent	Salary Budget			
		A	2212	181	5252	100			100.00	20080.00			
Effective		C	FUND	ORGN	ACCT	PROG	ACTV	LOCN	Percent	Fringe Budget	Match	Rate	
01-JUL-2005		A	1000	181	5500	100			100.00	2409.60	E	12.00	
Total Fringe Budget:										2409.60			
Position:	ENRL03	Orgn:	A 181	ECLS:	07	Begin:	01-JUL-2005	End:	Salary Budget:	45000.00			
		C	FUND	ORGN	ACCT	PROG	ACTV	LOCN	Percent	Salary Budget			
		A	1000	181	5210	100			50.00	22500.00			
		A	2213	181	5210	100			50.00	22500.00			
Effective		C	FUND	ORGN	ACCT	PROG	ACTV	LOCN	Percent	Fringe Budget	Match	Rate	
01-JUL-2005		A	1000	181	5500	100			50.00	2700.00	E	12.00	
01-JUL-2005		A	1000	181	5500	100			50.00	2700.00	E	12.00	
Total Fringe Budget:										5400.00			

* * * REPORT CONTROL INFORMATION * * *

Parameter Name	Value	Source	Message
Parameter Seq No:	133533		
Process Mode:	R	Default	
Active/Working Budgets	A	Default	
COAS Code:	A	Default	
Fiscal Year:	2006	Default	
Print Lines/Page:	55	Default	

Record Count : 23 Number of Positions Processed

Finance Extract Process (NHPFIN1)

The Finance Extract Process (NHPFIN1) has been modified to verify the value of the **Feed Future Encumbrance to Finance** indicator on the Position Control Installation Rules Form (NTRINST) to determine if only the current fiscal year amount must be fed, or the current and future amounts must be fed to Banner Finance as the 'To Post' amounts.

If the indicator is checked (Yes), the current fiscal year and future fiscal year encumbrance amounts will be added together and fed to Finance

If the indicator is unchecked (No), only the current fiscal year encumbrance amount will be fed.

The process has also been modified to assign new encumbrance Item numbers to future amounts so that separate transactions may be fed to Banner Finance. For the current fiscal year, encumbrance amounts will be stored by the Encumbrance Maintenance Process (NBPENCM) using the following item numbers:

0 - current salary

1 - current fringe

2 - current residual

Encumbrance amounts for future multiple years will be stored using the following item numbers:

3 - future salary

4- future fringe


5- future residual

It has also been modified to ignore future encumbrance amounts when updating the **Position Encumbrance Amount** field on the Position Budget Form (NBAPBUD) for salary encumbrance and fringe encumbrance, regardless of multi-year encumbering logic. The NBAPBUD form only displays budgeted, encumbered, and expended amounts for a single fiscal year.

The Finance Extract Process (NHPFIN1) has also been modified to use the Job Labor BPI in accordance to RPE 1-1S0XIR.

Organization Payroll Distribution Report (NHRDIST)

The Organization Payroll Distribution Report (NHRDIST) has been modified to identify Grant records in addition to existing parameters. Therefore, a new set of parameters has been added after the Home Organization group (parameter 16) and before the Fund group. The new parameters are similar to the Fund group parameters, but apply to Grants. All existing parameters (#17 and greater) have been renumbered accordingly.

Parameters	Name	Description/Values	Required?	Default	Validation
17	Grant Option	<p>Identify the Chart of Accounts whose Grant data is to be printed and the Grant(s) for which information is to be generated by the report in the following format:</p> <p><COA Code>, <Grant Option></p> <p>For example, B,A, implies print data for all grant codes belonging to the Chart of Accounts code, B.</p> <p>Select one of the following options for printing grant codes, namely:</p> <p>A All Grant Codes. Prints data for all Grant codes. If you enter this option, next enter the Fund Option parameter.</p> <p>R Range of Grant Codes Prints data for a specific range of Grant codes. If you select this option, next enter the From Grant parameter.</p> <p>W Wild Card Prints data for one or more specific Grant codes, and indicates that wild cards will be used to identify these Grant codes. If you enter this value, skip to the Grant parameter.</p> <p> Tip Whenever possible, use exact codes rather than wild cards since this practice speeds report processing. ■</p> <p>S Specific Grant Codes Prints data for one or more specific Grant codes. Enter exact Grant codes to identify these Grants. If you select this option, skip to the Grant parameter.</p>	No	None	None

Parameters	Name	Description/Values	Required?	Default	Validation
18	From Grant	Identify the Chart of Accounts code whose Grant data is to be printed and the <i>first</i> Grant code for which information is to be generated by the report in the following format: <COA Code>, <Grant Code> Example, B,2150	No	None	
19	To Grant	Identify the Chart of Accounts code whose Grant data is to be printed and the <i>last</i> Grant code for which information is to be generated by the report in the following format: <COA Code>, <Grant Code> Example, B,2170	No	None	
20	Grant	Identify the Chart of Accounts code and the specific fund for which data is to be printed by the report in the following format: <COA Code>, <Grant Code> For example: A,2155.	No	None	FRBGRNT

Salary Planner Extract Process (NBPSPEX)

The field, **Encumbrance Override End Date** has been added to the Job Labor Distribution window on NBAJOBS. Therefore, the Salary Planner Extract Process (NBPSPEX) has been modified to extract the Encumbrance Override End Date, if specified, along with the job labor distribution records and populate the distribution pages of the Salary Planner in Employee Self-Service.

Salary Planner Upload Process (NBPSPUP)

The Salary Planner Upload Process (NBPSPUP) has been modified to upload the **Encumbrance Override End Date** value, if specified in the labor distribution records in the Salary Planner, and populate the relevant EPAF.

Troubleshooting Tips

A few troubleshooting tips are listed below with regard to multi-year encumbering processing. Also refer to form and process information under the Changed Forms and New Process sections of the Release Guide.

Employee Jobs Form (NBAJOBS)

1. The **Encumber Multi Year Labor** check box is not reflecting the correct from the Finance Research Accounting Fund Maintenance Form (FRMFUND).

Check the following:

- 1.1. Find the Effective Dated labor distribution record.

- 1.2. Is the **Last Calculated Date** populated?

- 1.2.1. If yes, what is the date?

- 1.2.1. If no, what is the system date?

Go to the next step.

- 1.3. Access the Research Fund Inquiry Form (FRIFUND).

- 1.4. Query and search for the Fund Code and Research Accounting Fund with an Effective Date that is one day after the Last Calculated Date (or System Date).

Example, If the date is 23-JAN-2008, enter an Effective Date query as
<24-JAN-2008.

The form displays all the FRMFUND Effective-dated records that are less than the entered query date.

- 1.5. Review and identify the Encumber Multi Year Labor value displayed on NBAJOBS.

2. The **Budget Start Date** is not reflecting the correct value from Banner Finance.

2.1. On NBAJOBS, find the Effective Dated labor distribution record.

2.2. What is the field label for the Start Date; **Budget** or **Project**?

If Project, then there is no Budget Start Date on FRMFUND and the FRAGRNT value is being pulled.

2.3. Is the **Last Calculated Date** populated?

2.3.1. If yes, what is the date?

2.3.1. If no, what is the system date?

Go to the next step.

2.4. Access the Research Fund Inquiry Form (FRIFUND).

2.5. Query and search for the Fund Code and Research Accounting Fund with an Effective Date that is one day after the Last Calculated Date (or System Date).

Example, If the date is 23-JAN-2008, enter an Effective Date query as <24-JAN-2008.

The form displays all the FRMFUND Effective-dated records that are less than the entered query date.

2.5.1. If the Budget Start Date is populated, it should display on NBAJOBS.

2.5.2. If there is no Budget Period Start Date, review the queried records for a Project Start Date.

2.6. If both, the Budget Period and Project Start Dates are null, then no date is displayed on NBAJOBS.

3. The **Budget End Date** is not reflecting the correct value from Banner Finance.
 - 3.1. On NBAJOBS, find the effective-dated labor distribution record.
 - 3.2. What is the field label for the End Date; **Budget, Project or Fund Termination**?
 - 3.2.1. If Project, then there is no Budget End Date on FRMFUND and the FRAGRNT value is being pulled. FRAGRNT is not effective-dated.
 - 3.2.2. If it is Fund Termination, then the Fund has been terminated prior to the Budget or Project End Date.
 - 3.3. Is the **Last Calculated Date** populated?
 - 3.3.1. If yes, what is the date?
 - 3.3.2. If no, what is the System Date?

Go to the next step.
 - 3.4. Access the Research Fund Inquiry Form (FRIFUND).
 - 3.5. Query and search for the Fund Code and Research Accounting Fund with an Effective Date that is one day after the Last Calculated Date (or System Date).

Example, If the date is 23-JAN-2008, enter an Effective Date query as <24-JAN-2008.
 - 3.6. If all, i.e., the Budget Period Dates, the Project Start Date and the Fund Termination Date are null or beyond the Active fiscal year, then no date is displayed on NBAJOBS.

4. You enter an Encumbrance Override End Date, but don't see it on NBAJOBS.

The Encumbrance Override End Date is associated with a specific Job Labor Distribution Effective Date for a specific Fund. There may be multiple Job Labor Distribution Effective Dates, some with an Encumbrance Override End Date and some without an Encumbrance Override End Date.

Do the following:

- Make sure you are looking at the correct Job Labor Distribution Effective Date.
- Make sure the cursor is on the correct FOAPAL record.

If the same Fund is used on different FOAPAL lines within the same Effective Date, the Encumbrance Override End Date must be the same.

If an Encumbrance Override End Date exists earlier than the Budget/Project End Date or Fund Termination Date, the encumbrance calculation will use it regardless of any FRMFUND, FRAGRNT or FTMFUND date.

5. The Base Job is not displaying any Future Encumbrance amounts.
 - 5.1. Review the Job Detail Effective-dated records within the Active fiscal year. What are the dates?
 - 5.2. Review the Job Labor Distribution Effective-dated records within the Active fiscal year. What are the Funds used that may be identified to encumber multi-year?
 - 5.3. Find the FRMFUND Effective Dated record for any Fund identified above that is less than or equal to the Job Detail Effective Date(s) noted above.

Alternatively, query the FRIFUND form using the above described date query functionality.
 - 5.4. The **Encumber Multi Year Labor** indicator is the value displayed on NBAJOBS.

Encumbrance Maintenance Process (NBPENCM)

6. No future encumbrance amounts are being calculated by the NBPENCM process.
 - 6.1. What is the **Recast Date** being used?
 - 6.2. Find the FRMFUND record for the Fund(s) that is less than or equal to the Recast Date.

Alternatively, query the FRIFUND form using the above described date query functionality.
 - 6.3. The value of the Encumber Multi Year Labor indicator is used to determine if multiple year encumbrance calculations will occur.
7. The encumbrance calculation by the NBPENCM process does not appear correct.
 - 7.1. Review the logic used in the calculation for Begin and End dates by the NBPENCM process.
 - 7.2. Review the NBIJLHS records.
 - 7.2.1. Place cursor on the correct Job Labor Distribution Changes Effective Date.
 - 7.2.2. Select the correct FOAPAL in the Job Labor Distribution Detail block.
 - 7.2.3. Navigate to the Salary Transaction Detail tab.
 - 7.2.4. Review the End Date Reason for each entry.

8. A future Jobs Labor Distribution record is not being picked up by the NBPENCM process in the calculation.

Only Job Detail and Labor Distribution Effective-dated records on NBAJOBS within the Active fiscal year will be processed.

Transactions Interfaced to Banner Finance

If salary and fringe encumbrances have been calculated and fed to Banner Finance with the Feed Future Encumbrance to Finance indicator set to *Yes* (checked), and the indicator on the NTRINST form is re-set to *No* (unchecked), no backouts or adjustments of previously fed future encumbrance amounts will occur. Conversely, if the **Feed Future Encumbrance to Finance** indicator is set to *No* when records are fed to Banner Finance, and the indicator on the NTRINST form is re-set to *Yes*, future amounts will not be recalculated to post to Banner Finance.

Warning

This is an area of no return. You cannot change the NTRINST Feed Future Encumbrance to Finance indicator after the initial processing of a new fiscal year and have future encumbrances processed properly. ■

9. No records were interfaced for Future encumbrance amounts.

- 9.1. Review the **Feed Future Encumbrance to Finance** indicator on NTRINST.

- 9.1.1. If the indicator is unchecked (No), only the current fiscal year encumbrance amount will be fed to Finance.

- 9.1.2. If the indicator is checked (Yes), the current fiscal year and future fiscal year encumbrance amounts will be fed to Finance.

Encumbrance Calculation Examples

All examples below pertain to System-Calculated types of job assignments using the Encumbrance Recast Method.

Example 1—Multiple Year Projection with Payroll Calendar Limitation

The fiscal year is 7/1/2007 to 6/30/2008. An employee is appointed to a position as of 7/1/2007, paid on a monthly calendar, the annual salary is \$60,000 to one FOAPAL with a grant related fund, and the Assign Salary is \$5,000.

The grant period runs for four years from 7/1/07 to 6/30/2011. However, the payroll calendar rules have only been set up through 6/30/2010 for the employee's Pay ID.

NBPENCM is processed with a Recast Date of 7/1/2007. The calculation determines that, as of the Recast Date, the current encumbrance of the job is \$60,000 (Assign Salary x Number of Pays left = \$5,000 x 12). The process also determines that the future encumbrance of the job is \$120,000 (Assign Salary x Number of Pays left = \$5,000 x 24).

The grant period should allow for another 12 number of pays through 6/30/2011, but since the payroll calendar stops at 6/30/2010, the number of pays have been limited to that date.

Example 2—Multiple Year Projection with a Change in the Labor Distribution During the Active Fiscal Year

The fiscal year is 7/1/2007 to 6/30/2008.

An employee is appointed to a position as of 7/1/2007, paid on a monthly calendar, the annual salary is \$60,000 to one FOAPAL with an administrative fund, and the Assign Salary is \$5,000.

The employee is assigned to work under a grant effective 3/1/2008. Therefore, a labor distribution change is entered effective 3/1/2008 moving from an administrative fund to a grant related fund. The grant period runs for three years from 10/1/07 to 9/30/2010.

Effective Date	FOAPAL
01-JUL-2007	1110-14301-6113-10 100%
01-MAR-2008	2111-14301-6113-10 100%

NBPENCM is processed with a Recast Date of 2/1/2008.

The calculation determines that, as of the Recast Date, the 7/1/2007 FOAPAL has a current encumbrance amount of \$5,000 (Assign Salary x Number of Pays left = \$5,000 x 1). The process also determines that the 3/1/2008 FOAPAL has a current encumbrance amount of \$20,000 (Assign Salary x Number of Pays left = \$5,000 x 4), and a future encumbrance of \$135,000 (Assign Salary x Number of Pays left = \$5,000 x 27).

Example 3—Multiple Year Projection with an Encumbrance Override End Date

The fiscal year is 7/1/2007 to 6/30/2008.

An employee is appointed to a position as of 10/1/2007, paid on a monthly calendar, the annual salary is \$60,000 to one FOAPAL with a grant related fund, and the Assign Salary is \$5,000.

The grant period runs for five years from 10/1/07 to 9/30/2012. However, an Encumbrance Override End Date of 9/30/2009 has been entered on NBAJOBS to limit the future encumbrance calculation.

NBPENCM is processed with a Recast Date of 10/1/2007.

The calculation determines that, as of the Recast Date, the current encumbrance of the job is \$45,000 (Assign Salary x Number of Pays left = \$5,000 x 9). The process also determines that the future encumbrance of the job is \$75,000 (Assign Salary x Number of Pays left = \$5,000 x 15).

The grant period allows for another 36 number of pays through 9/30/2012, but since an Encumbrance Override End Date of 9/30/2009 was entered, the number of pays have been limited to that date.

Example 4—Projecting Contract Dates into Future Years

The fiscal year is 7/1/2007 to 6/30/2008.

An employee is appointed to a position as of 9/1/2007 with a deferred pay schedule and Contract Dates (9/1/2007 to 5/31/2008). They are paid on a monthly calendar, the annual salary is \$60,000 to one FOAPAL with a grant related fund, and the Assign Salary is \$5,000.

The grant period runs for three years from 9/1/07 to 8/31/2010. However, the encumbrance calculations will be limited by the Contract Dates and projected into the future using the same month and day, but advancing the year.

NBPENCM is processed with a Recast Date of 9/1/2007. The calculation determines that, as of the Recast Date, the current encumbrance of the job is \$45,000 (Assign Salary x Number of Pays left = \$5,000 x 9). The process also determines that the future encumbrance of the job is \$90,000 (Assign Salary x Number of Pays left = \$5,000 x 18).

Example 5—Multiple Year Projection with Multiple Labor Distribution FOAPALS

The fiscal year is 7/1/2007 to 6/30/2008.

An employee is appointed to a position as of 9/1/2007, paid on a monthly calendar, the annual salary is \$60,000 and the Assign Salary is \$5,000. The labor distribution is assigned to one administrative fund at 66.67% and one grant related fund at 33.33%:

Effective Date	FOAPAL
01-SEP-2007	1110-14301-6113-10 66.67%
	2111-14301-6113-10 33.33%

The grant period runs for three years from 9/1/07 to 8/31/2010.

NBPENCM is processed with a Recast Date of 9/1/2007. The calculation determines that, as of the Recast Date, the current encumbrance of the job is \$50,000 (Assign Salary x Number of Pays left = \$5,000 x 10). The process also determines that the future encumbrance of the job as \$43,329 [(Assign Salary x Number of Pays left) x Grant FOAPAL% = \$5,000 x 26)].

The current encumbrance amount is multiplied by the labor distribution percentage to obtain the amount for the specific FOAPALS:

Administrative - \$50,000 x 66.67% = \$33,335.00

Grant related - \$50,000 x 33.33% = \$16,665.00

However, the future encumbrance amount is only multiplied by the labor distribution percentage that applies to the grant related fund, to obtain the amount for the specific FOAPALS:

Grant related: \$130,000 x 33.33% = \$43,329.00

Example 6—Multiple Year Projection with Fringe Chargeback

The fiscal year is 7/1/2007 to 6/30/2008.

An employee is appointed to a position as of 7/1/2007, paid on a monthly calendar, the annual salary is \$60,000 to one FOAPAL with a grant related fund, and the Assign Salary is \$5,000.

The grant period runs for three years from 7/1/07 to 6/30/2010.

NBPENCM is processed with a Recast Date of 7/1/2007. The calculation determines that, as of the Recast Date, the current encumbrance of the job is \$60,000 (Assign Salary x Number of Pays left = \$5,000 x 12). The process also determines that the future encumbrance of the job is \$120,000 (Assign Salary x Number of Pays left = \$5,000 x 24).

The current encumbrance amount is multiplied by the Fringe Chargeback percentages on NTRFBLD to obtain the amount for the specific labor distribution:

$$\$60,000 \times 7.50\% = \$4,500 \text{ Fringe Encumbrance}$$

$$\$60,000 \times 2.50\% = \$1,500 \text{ Fringe Residual Encumbrance}$$

The future encumbrance amount that applies to the grant related fund is multiplied by the Fringe Chargeback percentages on NTRFBLD to obtain the amount for the specific labor distribution:

$$\$120,000 \times 7.50\% = \$9,000 \text{ Fringe Encumbrance}$$

$$\$120,000 \times 2.50\% = \$3,000 \text{ Fringe Residual Encumbrance}$$

Example 7—Multiple Year Projection using a Work Schedule

When calculating an encumbrance amount using a Work Schedule, the schedule is projected through the entire year counting every day, Monday through Sunday, unless otherwise ended or changed. Pay period and salary indicators are not taken into account when using a Work Schedule. If a change to the contract dates, rate of pay, Work Schedule or labor distribution occurs, a separate calculation must be made for each period. If a new effective date or change occurs on any day other than the first day of the Work Schedule, the calculation will add the extra hours for the entire week that includes the date of the change. Any remaining week of the Work Schedule will be added to the next effective dated span.

Consider a work schedule that encompasses 14 days total with a total of 40 hours (four 10 hour days) within each 7 day period as shown below.

Days	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Hours	0	10	10	10	10	0	0	0	10	10	10	10	0	0

The system will count:

- The maximum days in the Work Schedule. In our example, 14 maximum days.
- The total hours in the Work Schedule. In our example, eight 10 hour days would equal 80 total hours.
- The number of days within the labor distribution effective dates. Days represents every day in the Work Schedule, whether hours worked or not, i.e., usually 365 days in the year.

The formula for encumbrance calculation is:

Take	[Labor Distribution days / maximum days in Work Schedule (truncated to 0 decimals)]
Multiply by	[Total hours in Work Schedule (truncated to 0 decimals)]
Plus	Additional hours to complete partial work weeks
Multiply by	Regular Rate of Pay
Multiply by	Multiplication factor (1 if not using partial pay)
Equals	Encumbrance amount

The fiscal year is 7/1/2007 to 6/30/2008. An employee is appointed to a position as of 7/1/2007 subject to a Work Schedule beginning on 7/1/2007. They are paid on a bi-weekly calendar; the annual salary is \$27,777.37 to one FOAPAL with a grant related fund, with an Assign Salary of \$1,068.36 and a Regular Rate of \$13.354505.

The grant period runs for two years from 6/1/07 to 5/31/2009.

NBPENCM is processed with a Recast Date of 7/1/2007. The calculation determines that, as of the Recast Date, the current encumbrance of the job is \$27,910.92 (based on the computations below). The process also determines that the future encumbrance of the job is \$25,640.65 (based on the computations below).

Using the formula to calculate the current encumbrance amount for fiscal year ending 6/30/2008:

Take $366 / 14$ (truncated to 0 decimals) = 26.142857 (26 truncated)
 [Labor Distribution days / maximum days (truncated to 0 decimals)]

Multiply by 26×80 hrs = 2080 hrs
 [Total hours in Work Schedule (truncated to 0 decimals)]

Plus 2080 hrs + 10 hrs = 2090 total hours (February 29th will leave one additional day at the end of the 2007-2008 fiscal year)
 Additional hours to complete partial work weeks

Multiply by 2090 hrs x \$13.354505 = \$27,910.92
 Regular Rate of Pay

Multiply by \$27,910.92 x 1
 Multiplication factor (1 if not using partial pay)

Equals \$27,910.92
 Encumbrance amount

Use the above formula to calculate the future encumbrance amount for the next fiscal year ending 6/30/2009 (grant ends 5/31/2009):

Take $335 / 14$ (truncated to 0 decimals) = 23.928571 (23 truncated)
 [Labor Distribution days / maximum days in Work Schedule (truncated to 0 decimals)]

Multiply by 23×80 = 1840
 [Total hours in Work Schedule (truncated to 0 decimals)]

Plus $1840 + 80$ = 1920 total hours
 Additional hours to complete partial work weeks

Multiply by 1920 hours x \$13.354505 = \$25,640.65
Regular Rate of Pay

Multiply by \$25,640.65 x 1
Multiplication factor (1 if not using partial pay)

Equals \$25,640.65
Encumbrance amount

4 Multiple Year Encumbering-Technical



This section lists the technical changes made for the Multiple Year Encumbering Enhancement.

New Table

The following table has been added for the Multiple Year Encumbering Enhancement.

NBRJLEH

Database Column	Null?	Data Type
NBRJLEH_PIDM	NOT NULL	NUMBER(8)
NBRJLEH_POSN	NOT NULL	VARCHAR2(6 CHAR)
NBRJLEH_SUFF	NOT NULL	VARCHAR2(2 CHAR)
NBRJLEH_EFFECTIVE_DATE	NOT NULL	DATE
NBRJLEH_CAPTURE_DATE	NOT NULL	DATE
NBRJLEH_SEQ_NO	NOT NULL	NUMBER(3)
NBRJLEH_ENC_BEGIN_DATE	NOT NULL	DATE
NBRJLEH_ACTIVITY_DATE	NOT NULL	DATE
NBRJLEH_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
NBRJLEH_ENC_END_DATE		DATE
NBRJLEH_SALARY_ENCUMBRANCE		NUMBER(17,2)
NBRJLEH_FUTURE_SALARY_ENC		NUMBER(17,2)
NBRJLEH_END_DATE_REASON		VARCHAR2(60 CHAR)
NBRJLEH_DATA_ORIGIN		VARCHAR2(30 CHAR)

Changed Tables

The following tables of Banner Position Control have been modified for the Multiple Year Encumbering Enhancement.

NBRBJOB

Database Column	Null?	Data Type
NBRBJOB_FUTURE_SALARY_ENC		NUMBER(17, 2)
NBRBJOB_FUTURE_FRINGE_ENC		NUMBER(17, 2)

NBREJLD

Database Column	Null?	Data Type
NBREJLD_ENC_OVERRIDE_END_DATE		DATE

NBRJLBD

Database Column	Null?	Data Type
NBRJLBD_FUTURE_SALARY_ENC		NUMBER(17,2)
NBRJLBD_FUTURE_FRINGE_ENC		NUMBER(17,2)
NBRJLBD_FUTURE_FRINGE_RESIDUAL		NUMBER(17,2)
NBRJLBD_FUTURE_SAL_ENC_TO_POST		NUMBER(17,2)
NBRJLBD_FUTURE_FRG_ENC_TO_POST		NUMBER(17,2)
NBRJLBD_FUTURE_FRG_RES_TO_POST		NUMBER(17,2)
NBRJLBD_ENC_OVERRIDE_END_DATE		DATE
NBRJLBD_ENC_LAST_RECAST_DATE		DATE
NBRJLBD_ENC_LAST_CALC_DATE		DATE

NBRJLHS

Database Column	Null?	Data Type
NBRJLHS_SEQ_NO		NUMBER(3)
NBRJLHS_FUTURE_SALARY_ENC		NUMBER(17,2)
NBRJLHS_FUTURE_FRINGE_ENC		NUMBER(17,2)
NBRJLHS_FUTURE_FRINGE_RESIDUAL		NUMBER(17,2)
NBRJLHS_FUTURE_SAL_ENC_TO_POST		NUMBER(17,2)
NBRJLHS_FUTURE_FRG_ENC_TO_POST		NUMBER(17,2)
NBRJLHS_FUTURE_FRG_RES_TO_POST		NUMBER(17,2)
NBRJLHS_ENC_OVERRIDE_END_DATE		DATE
NBRJLHS_ENC_LAST_RECAST_DATE		DATE
NBRJLHS_ENC_LAST_CALC_DATE		DATE
NBRJLHS_JOB_END_DATE		DATE
NBRJLHS_CONTRACT_BEGIN_DATE		DATE
NBRJLHS_CONTRACT_END_DATE		DATE
NBRJLHS_GRNT_BUD_END_DATE		DATE
NBRJLHS_FUND_TERM_DATE		DATE

NTRINST

Database Column	Null?	Data Type
NTRINST_ENC_FUTURE_FEED_IND	NOT NULL	VARCHAR2(1 CHAR)

NORTLBD

Database Column	Null?	Data Type
NORTLBD_ENC_OVERRIDE_END_DATE		DATE

PERJHIS

Database Column	Null?	Data Type
PERJHIS_FUTURE_SALARY_ENC		NUMBER(17, 2)
PERJHIS_FUTURE_FRINGE_ENC		NUMBER(17, 2)

New Scripts

The following scripts are associated with the new NBRJLEH table.

nbrjleh_080000_01.sql

This script creates the Job Labor Encumbrance History Table (NBRJLEH).

nbrjleh_080000_02.sql

This script creates the primary key for the NBRJLEH table.

nbrjleh_080000_03.sql

This script creates column comments for the NBRJLEH table.

Changed Scripts

The following scripts modify existing Banner Position Control tables.

nbrbjob_080000_01.sql

This script adds two columns, NBRBJOB_FUTURE_SALARY_ENC and NBRBJOB_FUTURE_FRINGE_ENC to the NBRBJOB table.

nbrbjob_080000_02.sql

This script adds comments to the new columns of the NBRBJOB table.

nbrejld_080000_01.sql

This script adds a new column, NBREJLD_ENC_OVERRIDE_END_DATE, to the enter Encumbrance Override End Date.

nbrejld_080000_02.sql

This script adds a comment to the `NBREJLD_ENC_OVERRIDE_END_DATE` column of the `NBREJLD` table.

nbrjldb_080000_01.sql

This script adds new columns to the `NBRJLBD` table. For a detailed listing, refer to the [“Changed Tables” on page 196](#).

nbrjldb_080000_02.sql

This script adds column comments to the new columns of the `NBREJLD` table.

nbrjlhs_080000_01.sql

This script adds new columns to the `NBRJLHS` table. For a detailed listing, refer to the [“Changed Tables” on page 196](#).

nbrjlhs_080000_02.sql

This script adds column comments to the new columns of the `NBRJLHS` table.

ntrinst_080000_01.sql

This script adds a new column, `NTRINST_ENC_FUTURE_FEED_IND`, to the `NTRINST` table.

ntrinst_080000_02.sql

This script sets the value of the new column, `NTRINST_ENC_FUTURE_FEED_IND`, to *N*.

ntrinst_080000_03.sql

This script sets the `NTRINST_ENC_FUTURE_FEED_IND` column as a NOT NULL column.

ntrinst_080000_04.sql

This script adds a comment to the `NTRINST_ENC_FUTURE_FEED_IND` column of the `NTRINST` table.

nortlbd_080000_01.sql

This script adds a new column, `NORTLBD_ENC_OVERRIDE_END_DATE` to the `NORTLBD` table.

nortlbd_080000_02.sql

This script adds a comment to the `NORTLBD_ENC_OVERRIDE_END_DATE` column.

perjhis_080000_01.sql

This script adds two new columns, PERJHIS_FUTURE_SALARY_ENC and PERJHIS_FUTURE_FRINGE_ENC to the PERJHIS table.

perjhis_080000_02.sql

This script adds comments to the new columns of the PERJHIS table.

New Packages

The following packages have been added to accommodate for the Multiple Year Encumbering enhancement.

nbkjob1.sql

This is a helper package has been created for Job Base API.

nbkjob.sql

This is a helper package has been created for Job Base API.

nbkencm1.sql

This package contains functions and procedures related to Job encumbrances.

nbkencm.sql

This package contains functions and procedures related to Job encumbrances.

Changed Packages

The following packages have been modified to accommodate for the Multiple Year Encumbering enhancement.

nbkbud1.sql

The `p_copy_nbrejld` routine has been updated to process Encumbrance Override End Date. The routine `nokflib.p_edit_proj_code` has been updated in routines `p_validate_jobs_FOPAL` and `p_validate_posn_FOPAL`, to use the `p_eval_date` instead of `v_eval_date_str`.

nbkjenc1.sql

`p_calc_salary_encumbrance` has been rewritten to support multiple year encumbering.

nbkjenc.sql

`p_calc_salary_encumbrance` has been rewritten to support multiple year encumbering.

nbkjldb1.sql

Human Resources security has been moved to the Job Labor BPI. Procedures and functions have been modified to include the new columns from the `NBRJLBD` table.

nbkjob1.sql

To improve the performance of the Job Assignment BPI, the `p_process_job_leave` procedure has been added. `P_eligible_leave_codes_job` now executes `p_process_job_leave` to support EPAFs. All functions and procedures that are related to the Job Base entity have been moved to a new package called `nbkbjob`. The `nrjobs` subquery in `p_validate_supervisor_job` has been modified to be uncorrelated.

nbkjobs.sql

To improve the performance of the Job Assignment BPI, the `p_process_job_leave` procedure has been added. `P_eligible_leave_codes_job` now executes `p_process_job_leave` to support EPAFs. All functions and procedures that are related to the Job Base entity have been moved to a new package called `nbkbjob`. The `nrjobs` subquery in `p_validate_supervisor_job` has been modified to be uncorrelated.

nokedit0.sql

Logic has been added for a new `nbrjld_enc_override_end_date` column. The `p_mass_edit`, `p_process_edit` routines have been modified to add edits on the new encumbrance override end date.

Salary encumbrance calculation logic `nbkjobs.p_calc_sal_encumbrance` in `nokmupd.p_ins_dflt_nbrjld_rec` routine has been moved into the `p_mass_edit` routine as `np_job_assignment.p_update_salary_encumbrance` BPI call.

nokedit1.sql

Logic has been added for a new `nbrjld_enc_override_end_date` column. The `p_mass_edit`, `p_process_edit` routines have been modified to add edits on the new encumbrance override end date.

Salary encumbrance calculation logic `nbkjobs.p_calc_sal_encumbrance` in `nokmupd.p_ins_dflt_nbrjld_rec` routine has been moved into the `p_mass_edit` routine as `np_job_assignment.p_update_salary_encumbrance` BPI call.

nokepa1.sql

The new `nortlbd_enc_override_end_date` column has been added into the `p_insert_nortlbd` routine.

nokepaf.sql

The new `nortlbd_enc_override_end_date` column has been added into the `p_insert_nortlbd` routine.

nokepc1.sql

The `nortlbd_c`, `p_chk_required_fields_null` routines have been modified to add the new Encumbrance Override End Date.

nokepcr.sql

`nortlbd_rec` has been modified to add the new Encumbrance Override End Date.

nokfoa1.sql

A new procedure `p_validate_foapal` has been added to this package to validate Fund, Org, Acct, Prog, Activity and Location. This procedure will also perform the defaulting.

nokfoap.sql

A new procedure `p_validate_foapal` has been added to this package to validate Fund, Org, Acct, Prog, Activity and Location. This procedure will also perform the defaulting.

nokglob1.sql

A new global, `ENC_FUTURE_FEED_IND` and `p_init_session_globals` have been added to this package.

nokglob.sql

A new global, `ENC_FUTURE_FEED_IND` and `p_init_session_globals` have been added to this package.

nokin1.sql

`ptrinst_fl_orgn_security_ind` has been added to `f_ptrinst_rec`.

nokin.sql

The `r_fl_orgn_security_ind` column has been added to `ptrinst_rectype`.

nokmup1.sql

The `nbkjobs.p_calc_sal_encumbrance` logic has been moved to `nokedit1.sql` for proper future salary encumbrance calculation based on Labor Distributions. The `p_process_nbrj1bd_recs` routine has been modified to populate `nort1bd_enc_override_end_date` into `nbrj1bd_enc_override_end_date`.

nopbkld.sql

The new Amount field information has been added to the condition that triggers the backout.

nopibck.sql

The insert statement has been modified to add the following new fields:

NBRJLBD_FUTURE_SALARY_ENC, NBRJLBD_FUTURE_FRINGE_ENC,
NBRJLBD_FUTURE_FRINGE_RESIDUAL, NBRJLBD_FUTURE_SAL_ENC_TO_POST,
NBRJLBD_FUTURE_FRG_ENC_TO_POST, NBRJLBD_FUTURE_FRG_RES_TO_POST,
NBRJLBD_ENC_OVERRIDE_END_DATE, NBRJLBD_ENC_LAST_RECAST_DATE,
NBRJLBD_ENC_LAST_CALC_DATE.

nopilhs.sql

The new nbrjld_enc_override_end_date column has been added to populate into the history table.

pefspin.sql

A Grant script has been added to this package.

pevjob0.sql

This package has been modified to add a new column in the create statement, PEVJOB1_JOB_FUTURE_SALARY_ENC, a new column in the select statement NBRBJOB_JOB_FUTURE_SALARY_ENC, and added comments for the new columns.

pevjob1.sql

This package has been modified to add a new column in the create statement, PEVJOB1_JOB_FUTURE_SALARY_ENC, a new column in the select statement NBRBJOB_JOB_FUTURE_SALARY_ENC, and added comments for the new columns.

pevprf0.sql

This package has been modified to add a new column in the create statement, JOB_FUTURE_SALARY_ENC, a new column in the select statement, PERPVF1_JOB_FUTURE_SALARY_ENC, and added comments for the new columns.

pevprf1.sql

This package was modified to add a new column in the create statement, PERPVF1_JOB_FUTURE_SALARY_ENC, a new column in the select statement, NBRBJOB_JOB_FUTURE_SALARY_ENC, and added comments for the new columns.

New API

A new API, Job Encumbrance History has been added to accommodate for the multiple year encumbering enhancement. The following table provides information on the API. For more details, refer to the API Reference Guide of Position Control, Release 8.0.

Table 3: Jobs APIs

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Objects
NB_JOB_ENC_HISTORY	JOB_ENC_HISTORY	NB_JOB_ENC_HISTORY	nbkb_job_enc_hist0.sql	NBRJLEH	NBAJOBS
			nbkb_job_enc_hist1.sql		NBPENCM
		NB_JOB_ENC_HISTORY_RULES	nbkb_job_enc_hist_r0.sql		GURMESG
			nbkb_job_enc_hist_r1.sql		
		NB_JOB_ENC_HISTORY_STRINGS	nbkb_job_enc_hist_s0.sql		
	nbkb_job_enc_hist_s1.sql				
DML			nbkd_nbrjleh0.sql		
			nbkd_nbrjleh1.sql		
		GURMESG Seed Data	nbkb_job_enc_hist_gurmesg.sql		

Changed APIs

The following Jobs APIs have been modified to accommodate for the Multiple Year Encumbering enhancement. For more details, refer to the API Reference Guide of Position Control, Release 8.0.

Table 4: Jobs APIs

API Object Name	API Entity Name	Associated API Packages	Associated scripts	Associated Table	Affected Objects	
NB_JOB_BASE	JOB_BASE	nb_job_base	nbkb_job_base0.sql	NBRBJOB	NBAJOBS	
			nbkb_job_base1.sql		PEA1PAY	
			nbkb_job_base_rules		nbkb_job_base_r0.sql	PEAHIRE
			nbkb_job_base_r1.sql		PEAESCH	
		nb_job_base_strings	nbkb_job_base_s0.sql			
			nbkb_job_base_s1.sql			
		DML	nbkd_nbrbjob0.sql			
			nbkd_nbrbjob1.sql			
NB_JOB_DETAIL	JOB_DETAIL	nb_job_detail	nbkb_job_detail0.sql	NBRJOBS	NBAJOBS	
			nbkb_job_detail1.sql		PEA1PAY	
			nbkb_job_detail_rules		nbkb_job_detail_r0.sql	PEAHIRE
			nbkb_job_detail_r1.sql		PEAESCH	
		nb_job_detail_strings	nbkb_job_detail_s0.sql			
			nbkb_job_detail_s1.sql			
		DML	nbkd_nbrjobs0.sql			
			nbkd_nbrjobs1.sql			

Table 4: Jobs APIs

API Object Name	API Entity Name	Associated API Packages	Associated scripts	Associated Table	Affected Objects
NB_JOB_EARNINGS	JOB_EARNINGS	nb_job_earnings	nbkb_job_earnings0.sql nbkb_job_earnings1.sql	NBREARN	NBAJOBS
					PEA1PAY
		nb_job_earnings_rules	nbkb_job_earnings_r0.sql nbkb_job_earnings_r1.sql		PEAHIRE
					PEAESCH
		nb_job_earnings_strings	nbkb_job_earnings_s0.sql nbkb_job_earnings_s1.sql		
		DML	nbkd_nbrearn0.sql nbkd_nbrearn1.sql		
NB_JOB_LABOR	JOB_LABOR	nb_job_labor	nbkb_job_labor0.sql nbkb_job_labor1.sql	NBRJLBD	NBAJOBS
					PEA1PAY
		nb_job_labor_rules	nbkb_job_labor_r0.sql nbkb_job_labor_r1.sql		PEAHIRE
					PEAESCH
		nb_job_labor_strings	nbkb_job_labor_s0.sql nbkb_job_labor_s1.sql		
		DML	nbkd_nbrjlb0.sql nbkd_nbrjlb1.sql		

Changed BPIs

The Jobs BPIs have been modified for the Multiple Year Encumbering enhancement. The BPIs maintain employee jobs information. Each BPI, in turn, invokes one or more APIs. It is important to note that APIs alone cannot be used to maintain the jobs data. Applications must invoke the BPIs to ensure data integrity. The following table provides a brief overview of the Jobs BPIs and APIs associated with the Employee Jobs Form (NBAJOBS).

BPI Object Name	BPI Entity Name	Associated BPI Package	Associated API Packages	Associated BPI Scripts	Associated Table	Affected Objects
JOB_LABOR	JOB_LABOR	np_job_labor	nb_job_labor nb_job_labor_rules nb_job_labor_strings	nbkp_job_labor0.sql nbkp_job_labor1.sql	NBRJLBD	NBAJOBS PEA1PAY PEAHIRE PEAESCH
JOB_ASSIGNMENT	JOB_ASSIGNMENT	np_job_assignment	nb_job_detail nb_job_detail_rules nb_job_detail_strings nb_job_base nb_job_base_rules nb_job_base_strings	nbkp_job_assignment0.sql nbkp_job_assignment1.sql	NBRJOBS NBRBJOB	NBAJOBS PEA1PAY PEAHIRE PEAESCH
JOB_EARNINGS	JOB_EARNINGS	np_job_earnings	nb_job_earnings nb_job_earnings_rules nb_job_earnings_strings	nbkp_job_earnings0.sql nbkp_job_earnings1.sql	NBREARN	NBAJOBS PEA1PAY PEAHIRE PEAESCH

5 Establishing Combined Deduction Limits-Functional



Banner Human Resources provided the ability to check and ensure that combinations of employee and employer contributions towards employee retirement plans were within the elective deferral maximum limit set by the IRS. This functionality has now been extended to check for the employee's

- Annual contribution limit-tracks a total for deductions and benefits.
- Annual compensation limit-tracks a cap limit for applicable gross associated with a benefit.
- Catch-up contributions
- 15-year rule plan

This extended functionality gives benefits administrators the ability to check an employee's contribution limits with regard to their participation in retirements plans, catch-up contributions, and 15-year rule plans. To accommodate this feature, the following changes have been effected in Banner:

- A new rule form, Benefit/Deduction Combined Limit Rule Form (PTRBDCL), has been created where rules for combined limits (dollar amounts) can be specified and assigned to a Combined Limit Code.

For example, you can establish a rule to check that the employee's annual contribution limit for any combination of retirement plans (401(k), 403(b), and 457(b)) is limited to \$46,000. This rule applies to all employees aged below 50.

Similarly, you can specify a second rule to check the annual contribution limit for employees participating in retirement plans as well as a catch-up contribution plan that is limited to \$50,000.

- Several new changes have been made to the Benefit/Deduction Rule Form (PTRBDCA)
 - Three new calculation rules have been added to provide flexibility for specifying retirement contributions and limitations that are not based on a plan code:
 - 16 - Flat Amount by Employee with Employer Share
 - 28 - Percent of Gross by Employee with Employer Share
 - 29 - Percent of Gross (each plan) with Combined Limits - Employer Match.
 - A new, optional field, **Combined Limit Rule Code**, defined on the Benefit/Deduction Combined Limit Rule Form (PTRBDCL), has been added to the Main block of PTRBDCA. This code will default to the employees' benefit/deduction records on PDAEDN when they are created.
 - A new block, Combined Limit Deduction Group, has been added to link multiple Benefit/Deduction Codes together while using a single set of combined limit rules.
- The Employee Benefit or Deduction Form (PDAEDN) has been enhanced to enforce combined limit rules on applicable benefits and deductions for employees and/or employers who may be contributing to retirement plans, catch-up contributions, or 15-year rule plans. Consequently, the following new fields have been added: **Combined Limit Rule Code, Description, Employer Limit, Employee Limit, Combined Limit, and Applicable Gross Limit**.
Only the **Combined Limit Rule Code** can be updated. All other fields default from the information on Benefit/Deduction Combined Limit Rule Form (PTRBDCL). Therefore, when the IRS changes contribution limits, the only form that has to be updated is the Benefit/Deduction Combined Limit Rule Form (PTRBDCL). All employee deduction records will reflect the change immediately.
- The **Combined Limit Rule Code** has also been added to the Benefit/Deduction Mass Change Rules Form (PTRBDMC) as a new criteria to mass populate deduction records with a combined limit code. Accordingly, the related process, Benefit/Deduction Mass Change Process (PDPBDMC) has also been modified to mass-insert the combined limit code on employee deduction records.
- The **Combined Limit Rule Code** field has also been added to the Employee Deduction History Form (PEIDHIS) to track and maintain a history of any changes made to this information.

 **Note**

When a combined benefit code is in place for a series of deduction/benefit codes, Employee and Employer Limits are no longer necessary in the PTRBDCA rule or within the Plan Table. ■

The following benefits/payroll processes have been modified to ensure that the limits are checked appropriately:

- Pay Period Proof Process (PHPPROF)

This process has been modified to verify that all linked retirement deductions are using the same combined limit code. If they don't, the following error message will be displayed: **ERROR* Combined Limit Code on Associated Deductions do not Match - Correct Deductions, and the employee's payroll record will be set back to Disposition 15.*

- Payroll Calculation Process (PHPCALC)

This process has been modified:

- To support three new calculation rules 16 - Flat Amount by Employee with Employer Share, 28 - Percent of Gross by Employee with Employer Share, and 29 - Percent of Gross (each plan) with Combined Limits - Employer Match.
- To check for the combined limit code on deduction records, if available, and enforce the new combined maximum limits on the Employer Limit, Employee Limit, Combined Limit, and Maximum Applicable Gross. When any of the above limits are reached, PHPCALC will no longer process any additional contributions made according to the calculation rule.

- Pay Period Proof Process (PHPPROF)

This process has been modified to verify that all combined limit deduction codes being processed for associated deductions have the same combined limit rule code on PDRDEDN. If they don't, the following error message will be displayed:

**ERROR* Combined Limit Code on Deductions do not Match - Correct Deductions, and the employee's payroll record will be set back to Disposition 15.*

The 403B enhancement also satisfies the following RPEs: CMS-RPE32584 and 1-LXAVB.

Create a combined limit rule for deductions as follows:

1. At **Combined Limit Rule Code** enter an alphanumeric code of a maximum of eight characters.
2. Enter a description of the code entered in Step 1.
3. At **Employee Limit**, enter the annual employee limit for contributions as defined at your organization or as prescribed by the IRS.
4. At **Employer Limit**, enter the annual employer limit for contributions as defined at your organization.
5. At **Combined Limit**, enter the annual combined limit for the Employee and Employer Limits at your organization or as prescribed by the IRS.
6. At **Applicable Gross Limit**, enter the applicable gross limit for the combined limit rule in accordance to the IRS rules.
7. Save the entered or updated information.

The **Activity Date** displays the date on which the record was created or updated.

Changed Forms

Benefit/Deduction Rule Form (PTRBDCA)

Three new values 16, 28 and 29 have been added to the **Calculation Rule**.

Additionally, a new field, **Combined Limit Rule Code** has been added to this rule form that will specify a default combined limit rule (created on PTRBDCL) on the Employee Benefit/Deduction records (PDAEDN). Stated differently, this field does not carry the logic used during the payroll process. It represents a default value and can be changed on the PDAEDN record.

The screenshot shows the PTRBDCA 8.0 form with the following fields and values:

- Benefit or Deduction Code:** 403
- Description:**
 - Short:** 403(b)
 - Long:** Section 403(b) Deferral
- Calculation Information:**
 - Priority:** 25
 - Deduction Type:** 10
 - Tax Code:** (empty)
 - 1099-R Code:** (empty)
 - Calculation Rule:** 21 Percent of Gross with Plan & Limit
 - Arrearage Method:** No Arrears
 - Year-To-Date Start Month Indicator:** 1
 - Combined Limit Rule Code:** 403REG (dropdown menu also shows 403 regular)
 - Continue Employer Contributions when on Leave with Benefits
- Deduction or Contribution Frequency:**
 - Payroll Periods:** 1, 2, 3, 4, 5

Field	Description
Combined Limit Rule Code	<p data-bbox="505 289 1365 390">From the pull-down list, select a combined limit rule code that was predefined on the Benefit/Deduction Combined Limit Rule Form (PTRBDCL).</p> <p data-bbox="505 415 1146 447">The system displays a description of the selected code.</p> <p data-bbox="505 472 1365 604">This combined limit rule code will default to all employee's Benefit/Deduction records (PDADEDN) who use the Benefit/Deduction Code specified in the Key block of this form. You can override this value on PDADEDN.</p> <p data-bbox="505 625 1365 684">Note: If this field is blank, you must populate it on PDADEDN in order for Combined Limits to work.</p>

Field	Description
Calculation Rule	Three new calculation rules have been added to this field.
	<p>16 Flat Amount by Employee with Employer Share</p> <p>Flat amount deduction or contribution derived from the Employee Benefit/Deduction Form (PDAEDN). The employee deduction amount is Amount 1 (PDAEDN) up to an annual limit of Amount 3 (PDAEDN). The employer contribution amount is Amount 2 (PDAEDN) up to an annual limit of Amount 4 (PDAEDN). A zero at PDAEDN Amount 3 or 4 (employee and employer annual limits) means unlimited.</p>
	<p>28 Percent of Gross by Employee with Employer Share</p> <p>Percentage amount deduction or contribution derived from the Employee Benefit/Deduction Form (PDAEDN). The employee deduction amount is calculated according to the algorithm Gross pay times (Amount 1 (PDAEDN) times .01) up to an annual limit of Amount 3 (PDAEDN). The employer contribution amount is calculated according to the algorithm Gross pay times (Amount 2 (PDAEDN) times .01) up to an annual limit of Amount 4 (PDAEDN). A zero or blank at PDAEDN Amount 3 or 4 (employee and employer annual limits) means unlimited.</p>
	<p>29 Percent of Gross (each plan) with Combined Limits - Employer Match.</p> <p>Percentage deduction or contribution based on the deduction code's PTRBDCA table entry whose plan code is equal to Option Code 1 of the Employee's deduction record (PDAEDN). The employee deduction amount is calculated according to the algorithm Gross pay times (Amount 1 (PDAEDN) times .01) up to an annual limit of Amount 3 (PDAEDN).</p> <p>The employer contribution amount is calculated according to the algorithm Gross pay times (Amount 2 (PDAEDN) times .01) up to an annual limit of Amount 4 (PDAEDN). In addition, since this is an Employer Match, the employer contribution will stop once the employee deduction stops. A zero or blank at PDAEDN Amount 3 or 4 (employee and employer annual limits) means unlimited.</p>

Employee Benefit/Deduction Form (PDAEDN)

To assign a combined limit rule with an employee's retirement benefit or deduction plan, a Combined Limit Rule Code, and five new display fields (**Description**, **Employee Limit**, **Employer Limit**, **Combined Limit**, and **Applicable Gross Limit**) have been added to this form. These fields are identical to those on the Benefit/Deduction Combined Limit Rule Form (PTRBDCL), however, only the Combined Limit Rule Code can be updated. All other fields display the current values of the Benefit/Deduction Combined Limit Rule Form (PTRBDCL).

Note

This design allows the limits to be changed on PTRBDCL without having to change the limits on individual PDAEDN records. ■

The Combined Limit Rule Code value defaults from the assigned code on PTRBDCA for the benefit/deduction code. You can override or remove the default from the PDAEDN record. If there is no default from PTRBDCA, you can select and specify a Combined Limit Rule Code from a list of values.

If the Combined Limit Group block (PTRBDCA) identifies multiple benefit/deduction codes as associated together, then each of these benefit/deduction codes on the employee's PDAEDN record must have the same Combined Limit Rule Code. See the example below and also refer to the changed process for Payroll Proof Process (PHPPROF).

Example

An employee under 50 years of age signs up for three benefit/deduction codes:

- RT1 - Retirement Fund 1
- RT2 - Retirement Fund 2
- RT3 - Retirement Fund 3

Form	Block	Field	Values
PTRBDCL	Main	Combined Limit Rule Code	UNDER50
PTRBDCA	Combined Limit Group	Benefit or Deduction Code	RT2
(for deduction code RT1)			RT3
PTRBDCA	Combined Limit Group	Benefit or Deduction Code	RT1
(for deduction code RT2)			RT3

Form	Block	Field	Values
PTRBDCA (for deduction code RT3)	Combined Limit Group	Benefit or Deduction Code	RT1 RT2
PDAEDN (for this employee's RT1)	Deduction	Benefit or Deduction Code	UNDER50(*)
PDAEDN (for this employee's RT2)	Deduction	Benefit or Deduction Code	UNDER50(*)
PDAEDN (for this employee's RT3)	Deduction	Benefit or Deduction Code	UNDER50(*)

* When PTRBDCA associates the three benefit/deduction codes together, then each employee that has these deductions must have the same Combined Limit Rule Code for each one. However, different employees may have different Combined Limit Rule Codes assigned to their PDAEDN records, but they must still be consistent for each of the employee's deduction records. In other words, any other employee who is participating in a Catch-up contribution could have a second entry on PTRBDCL as the following:

PTRBDCL	Main	Combined Limit Rule Code	OVER50
PTRBDCA need not change as shown below:			
PTRBDCA (for deduction code RT1)	Combined Limit Group	Benefit or Deduction Code	RT2 RT3
PTRBDCA (for deduction code RT2)	Combined Limit Group	Benefit or Deduction Code	RT1 RT3
PTRBDCA (for deduction code RT3)	Combined Limit Group	Benefit or Deduction Code	RT1 RT2

Form	Block	Field	Values
------	-------	-------	--------

The second employee can use the same benefit or deduction codes, but with the different Combined Limit Codes as shown below:

PDADEDN	Deduction	Benefit or Deduction Code	OVER50
(for this employee's RT1)			
PDADEDN	Deduction	Benefit or Deduction Code	OVER50
(for this employee's RT2)			
PDADEDN	Deduction	Benefit or Deduction Code	OVER50
(for this employee's RT3)			

Employee Benefit or Deduction PDADEDN 8.0

ID: B80100 Maya Corrigan
 Benefit Category: F1 Full Time Employees
 Deduction: 403 Section 403(b) Deferral
 Last Paid Date: 31-MAR-2007
 Query Date: 11-SEP-2006

Deduction Add or Replace and Arrears Excluded Payroll ID Premium History

Begin Date: 01-APR-2007 End Date: Calculation Rule: 21 Bond Balance:

Effective Date: 01-APR-2007 Status: Active Reference:

Options			Amounts		
Title	Value	Entry	Title	Amount	Entry
1 Plan:	1	Required	1 EE Perct	3.0000	No Entry
2		No Entry	2 ER perct	.0000	No Entry
3		No Entry	3	23,000.00	No Entry
4		No Entry	4	.00	No Entry
5		No Entry			

Combined Limit Rule Code	Description	Employee Limit	Employer Limit	Combined Limit	Applicable Gross Limit
403	403(b) REG	150.00	150.00	335.89	

The new fields added are:

Field	Description
Combined Limit Rule Code	Displays the code originally entered on PTRBDCL. If this code is used as the default for employees' PDADEDN records, this code may be identified on the deduction records of PTRBDCA. So, when the employee is assigned the Benefit/Deduction Code, the Combined Limit Code defaults to the record.
Description	Displays a description of the combined limit rule code.
Employee Limit	Displays the employee limit as set up for the combined limit rule on PTRBDCL.
Employer Limit	Displays the employer limit as set up for the combined limit rule on PTRBDCL.
Combined Limit	Displays the combined limit as set up for the rule on PTRBDCL.
Applicable Gross Limit	Displays the applicable gross limit as set up on PTRBDCL, if available.

Employee Deduction History Form (PEIDHIS)

The Employee Deduction History Form displays a record of changes made to the Employee Deduction Form. The **Combined Limit Rule Code** has been added to this form to enable payroll or benefits administrators track any updates made to combined limits.

The screenshot shows the Employee Deduction History Form (PEIDHIS 8.0) with the following fields and values:

- ID:** B80100 (dropdown), Maya Corrigan (text)
- Deduction Code:** 403
- Status:** A
- Effective Date:** 01-APR-2007
- Reference Number:** (empty)
- Option 1:** 1
- Option 2:** (empty)
- Option 3:** (empty)
- Option 4:** (empty)
- Option 5:** (empty)
- Amount 1:** (empty)
- Amount 2:** (empty)
- Amount 3:** (empty)
- Amount 4:** (empty)
- Arrear Balance:** (empty)
- Combined Limit Rule Code:** 403
- Capture Date and Time:** 11-SEP-2006 13:37:41
- User ID:** MKRISHNA
- Deleted
- Arrear Status
- Open Enrollment:** N
- Begin Date:** 01-APR-2007
- End Date:** (empty)
- Add or Replace section:**
 - Indicator:** (empty)
 - Payroll ID:** (empty)
 - Employee Amount:** (empty)
 - Employer Amount:** (empty)
 - Applicable Gross:** (empty)

Field	Description
Combined Limit Rule Code	Displays the code assigned to the employee's PDAEDN record. This code was originally entered on PTRBDCL.

Benefit/Deduction Mass Change Rule Form (PTRBDMC)

This rule form allows you to specify criteria to enforce mass changes on benefits or deduction records. A new field, **Combined Limit Rules Code** has been added to the Main block to allow you to mass populate benefit or deduction records with a combined limit rule code.

Options			Amounts		
Title	Value	Entry	Title	Amount	Entry
1 Plan:	1	Required	1 EE Perct:	3.0000	No Entry
2		No Entry	2 ER perct:	.0000	No Entry
3		No Entry	3	23,000.00	No Entry
4		No Entry	4		No Entry
5		No Entry			

Field	Description
Combined Limit Rule Code	Select a combined limit rule code from the Benefit/Deduction Combined Limit Rules Form (PTRBDCL). Access this form by selecting the Search feature for this field.
	Search Benefit/Deduction Combined Limit Rules Form (PTRBDCL)
	The system displays a description of the selected code.

Changed Reports and Processes

Payroll Calculation Process (PHPCALC)

The Payroll Calculation Process (PHPCALC) has been modified to support the new calculations rules, 16 - Flat Amount by Employee with Employer Share, 28 - Percent of Gross by Employee with Employer Share, and 29 - Percent of Gross (each plan) with Combined Limits - Employer Match.

The process now checks for the existence of a combined limit code on an employee's deduction record. If one exists, the combined limit rule is applied and enforces the following maximums on the current payroll: Employee Limit, Employer Limit, Combined Employee/Employer Limit, and Maximum Applicable Gross. If the maximum is reached on any one of these limits (after including the YTD amounts), additional deductions and/or contributions will no longer be made according to the Calculation Rule definition.

 **Note**

The process will also consider the following calculation rules that contain an annual limit (on PTRBDCA) during computation of Combined Limit Rules.

Calculation Rule	Description
11	Flat Amount (with plan)
16	Flat Amount by Employee with Employer Share
21	Percent of Gross each plan
28	Percent of Gross by Employee with Employer Share
29	Percent of Gross (each plan) with Combined Limits - Employer Match.

Payroll Proof Process (PHPPROF)

To ensure that all combined limit deduction codes being processed are using the same combined limit rule code on PDRDEDN, a new edit has been added to the Payroll Proof Process (PHPPROF). If a mismatch is discovered, the following error message will be displayed on the employee's payroll record: **ERROR* Combined Limit Code on Deductions Do Not Match - correct deductions*, and the employee's payroll record disposition will be set back to 15.

Benefit Deduction Mass Change Process (PDPBDMC)

The Benefit Deduction Mass Change Process (PDPBDMC) has been modified to accept and either insert or update the Combined Limit Code in the PDRDEDN table for the effective-dated record.

6 Establishing Combined Deduction Limits-Technical



This section documents the technical changes made to accommodate for the Establishing Combined Deduction Limits enhancement.

New Tables

The following new tables have been created.

PTRBDCL

Database Column	Null?	Data Type
PTRBDCL_CODE	NOT NULL	VARCHAR2(8 CHAR)
PTRBDCL_DESC	NOT NULL	VARCHAR2(30 CHAR)
PTRBDCL_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PTRBDCL_ACTIVITY_DATE	NOT NULL	DATE
PTRBDCL_DATA_ORIGIN		VARCHAR2(30 CHAR)
PTRBDCL_EMPL_LIMIT		NUMBER(17,2)
PTRBDCL_EMPR_LIMIT		NUMBER(17,2)
PTRBDCL_EMPL_EMPR_LIMIT		NUMBER(17,2)
PTRBDCL_MAX_GROSS		NUMBER(17,2)

PTRBDLG

Database Column	Null?	Data Type
PTRBDLG_CODE	NOT NULL	VARCHAR2(3 CHAR)
PTRBDLG_BDCA_CODE	NOT NULL	VARCHAR2(3 CHAR)
PTRBDLG_USER_ID	NOT NULL	VARCHAR2(30 CHAR)
PTRBDLG_ACTIVITY_DATE	NOT NULL	DATE
PTRBDLG_DATA_ORIGIN		VARCHAR2(30 CHAR)

Changed Tables

The following tables have been modified for the Combined Deduction Limits enhancement.

PTRBDCA

Database Column	Null?	Data Type
PTRBDCA_BDCL_CODE		VARCHAR2(8 CHAR)

PTRBDMC

Database Column	Null?	Data Type
PTRBDMC_BDCL_CODE		VARCHAR2(8 CHAR)

PDRDEDN

Database Column	Null?	Data Type
PDRDEDN_BDCL_CODE		VARCHAR2(8 CHAR)

PERDHIS

Database Column	Null?	Data Type
PERDHIS_BDCL_CODE		VARCHAR2(8 CHAR)

New Scripts

The following scripts are associated with the new tables of the Combined Deduction Limits enhancement.

ptrbdcl1_80000.sql

This script creates the Benefit/Deduction Combined Limits Rule Table (PTRBDCL).

ptrbdcl2_80000.sql

This script creates the primary key for the PTRBDCL table.

ptrbdcl3_80000.sql

This script adds column comments to the PTRBDCL table.

ptrbdlg1_80000.sql

This script creates the Combined Limit Deductions Group Table (PTRBDLG).

ptrbdlg2_80000.sql

This script creates the primary key for the PTRBDLG table.

ptrbdlg3_80000.sql

This script adds column comments to the PTRBDLG table.

ptrbdlg4_80000.sql

This script creates a foreign key FK1_PTRBDLG_INV_PTRBDCA_KEY for the PTRBDLG table.

Changed Scripts

The following scripts modify existing Banner Human Resources tables.

ptrbdca1_80000.sql

This script adds a PTRBDCA_BDCL_CODE column into PTRBDCA table.

ptrbdca2_80000.sql

This script creates a foreign key FK1_PTRBDCA_INV_PTRBDCL_KEY for the PTRBDCA table.

ptrbdca3_80000.sql

This script adds a comment for the PTRBDCA_BDCL_CODE column in the PTRBDCA table.

ptrbdmc1_80000.sql

This script adds a new PTRBDMC_BDCL_CODE column to the PTRBDMC table.

ptrbdmc2_80000.sql

This script adds a comment to the PTRBDMC_BDCL_CODE column in the PTRBDMC table.

ptrbdmc3_80000.sql

This script adds a foreign key, FK1_PTRBDMC_ON_PTRBDCL_KEY to the PTRBDMC table.

pdrdedn_080000_01.sql

This script adds a new column, PDRDEDN_BDCL_CODE to the PDRDEDN table.

pdrdedn_080000_02.sql

This script adds a foreign key for the PDRDEDN table.

pdrdedn_080000_03.sql

This script adds a comment to the PDRDEDN_BDCL_CODE column.

perdhis_080000_01.sql

This script adds the PERDHIS_BDCL_CODE column to the PERDHIS table.

perdhis_080000_02.sql

This script adds a column comment for PERDHIS_BDCL_CODE.

Changed Library

The following library has been modified.

pdklib1.sql

This package provides common deduction processing for Banner Human Resources.

The select and insert statements in `P_SetDednStatus` routine have been modified to include the new **Combined Limit** code field, `BDCL_CODE`, added to `PDRDEDN` and `PERDHIS` table. The amount cross-referenced table, `pdklibs.rule_amt_xref`, has been updated to include the format for the four amount fields for the new calculation rules: 16, 28, and 29. `F_DednHasPlan` has been modified to mark calculation rule 29 as the deduction with plans.

Changed Package

The following package has been modified.

pdkdedn (pdkdedn1.sql and pdkdedn.sql)

This package has been modified for RPE # 1-LXAVB, the ability to combine contribution amounts for multiple deductions and impose annual limits on those combined contributions. In addition, the ability to impose an annual maximum applicable gross for contributions was added.



New APIs

Two new APIs have been created for the Combined Deduction Limits enhancement.

API Object Name	API Entity Name	Associated API Packages	Associated scripts	Associated Table	Affected Forms and Processes
PB_DEDN_COMB_LMT	DEDN_COMB_LMT	PB_DEDN_COMB_LMT	ptkb_dedn_comb_lmt0.sql ptkb_dedn_comb_lmt1.sql	PTRBDCL	
		PB_DEDN_COMB_LMT_RULES	ptkb_dedn_comb_lmt_r0.sql ptkb_dedn_comb_lmt_r1.sql		
		PB_DEDN_COMB_LMT_STRINGS	ptkb_dedn_comb_lmt_s0.sql ptkb_dedn_comb_lmt_s1.sql		
		DML	ptkd_ptrbdc10.sql ptkd_ptrbdc11.sql		
PB_DEDN_LMT_GRP	DEDN_LMT_GRP	PB_DEDN_LMT_GRP	ptkb_dedn_lmt_grp0.sql ptkb_dedn_lmt_grp1.sql	PTRBDLG	
		PB_DEDN_LMT_GRP_RULES	ptkb_dedn_lmt_grp_r0.sql ptkb_dedn_lmt_grp_r1.sql		
		PB_DEDN_LMT_GRP_STRINGS	ptkb_dedn_lmt_grp_s0.sql ptkb_dedn_lmt_grp_s1.sql		
		DML	ptkd_ptrbd1g0.sql ptkd_ptrbd1g1.sql		



7 Support for Internationalization-Functional



The Banner system is used by higher education institutions worldwide. As Banner is enhanced and modernized, one major initiative is to make the system more adaptable for use in different countries and with different languages. This ongoing effort is called internationalization (and often abbreviated I18N). Internationalization reduces the amount of custom modifications required to make Banner usable for clients in various countries.

For this release, several major changes were made to support internationalization.

Unicode Support

With this release, Banner supports the Unicode international character set through the character standard UTF8. As a part of the installation process for Release 8.0, Banner's Oracle database is converted to the UTF8 standard.

Additional IDs

A new table, the Additional Identification Table (GORADID), allows you to store any number of extra IDs for a person. Each Additional ID must be assigned an ID Type. You can set up Additional ID Types using the new validation form and table GTVADID.

A new **Additional ID** tab on the SPAIDEN form displays the new Additional ID information. See the *Banner Student 8.0 Release Guide* for more information.

Enhanced Fields

For this release, many fields have been expanded on Banner tables and forms. These fields can now accommodate longer data values that might be needed. The types of fields that have been expanded include the following:

- Name
- Address
- Telephone number
- E-mail address
- ID

For complete information about I18N, including detailed information about changes to many Banner General objects, refer to the *Banner General 8.0 Release Guide*.

The **First Name** and the **Middle Initial** fields have been expanded to support 60 characters on the following forms for internationalization.

Affected Forms

Applicant Entry by Requisition/Position Form (PAAAPOS)
Applicant Information Form (PAAAPPL)
Cobra Beneficiary Coverage Form (PCABCOV)
Cobra Beneficiary Form (PCABENE)
COBRA Person Form (PCAPERS)
Employee Assignment Extract Form (PDAASGN)
Beneficiary Coverage Form (PDABCOV)
Beneficiary Form (PDABENE)
Employee Demographic Extract Entry Form (PDADEMO)
California STRS F-496 Activity Form (PDAF496)
California STRS Status/Name Change Maintenance Form (PDAMR87)
California PERS Monthly Report of Contributions (PDAPERS)
Beneficiary Coverage Inquiry Form (PDICLST)
One-Time Payment Form (PEA1PAY)
Employee Form (PEAEMPL)
Faculty Tracking Form (PEAFACT)
New Hire Form (PEAHIRE)
Employee Leave Balances Form (PEALEAV)
Employee Termination Verification Process (PEATMVF)
Employee List by Faculty Action Form (PEIELFA)
Employee Leave History Form (PEILHIS)
Employee Seniority Adjustment History Form (PEISAHS)
Adjustment Processing Form (PHAADJT)

Affected Forms

Department Payroll Summary Form (PHADSUM)
On-line Time Entry Form (PHAHOUR)
Labor Redistribution Form (PHAREDS)
Electronic Approvals of Time Entry Form (PHATIME)
History Jobs Inquiry Form (PHIJOBS)
Bargaining Unit Form (POABARG)
Employee Search Form (POIIDEN)
Person Experience Form (PPAEXPR)
Identification Form (PPAIDEN)
Telephone Form (PPATELE)
Address List Inquiry Form (PPIADDR)
1099-R Form (PXA1099)
Annual Statistics Canada Data Survey Form (PXAASCD)
MMREF-1 Electronic Filing Form (PXAMMEF)
Magnetic Tape Rules Form (PXAMTAP)
T4/T4A Magnetic Tape Rules Form (PXAMTT4)
W-2c Form (PXA2CC)
Labor Distribution Data Inquiry Form (NHIDIST)
Electronic Approval Summary Form (NOAAPSM)
Electronic Personnel Action Form (NOAEPAF)
Electronic Approvals Error Message Form (NOIEMSG)
noqlpls.pll
poqrpls.pll

The **Address** fields have been expanded to support 75 characters.

Affected Forms

Union Location Rules Form (PTRUNLO)
Location Rules Form (PTRLCDE)

The **City** field has been expanded to support 50 characters

Affected Forms and Processes

Union Location Rules Form (PTRUNLO)
Location Rules Form (PTRLCDE)
Employer Rules Form (PTREMPR)
Health and Safety Incident Location Rules Form (PTRHSIL)
Installation Rules Form (PTRINST)
Job Location Rules Form (PTRJBLN)
School Rules Form (PTRSCHL)
Required Fields Repeating Table (PEREE04)

Affected Forms and Processes

Required Fields Repeating Table (PEREE05)

Required Fields Repeating Table (PEREE06)

The Area Code of the **Telephone** field has been expanded to accommodate 6 characters on the following forms and table:

Affected Forms

Union Location Rules Form (PTRUNLO)

Person Experience Form (PPAEXPR)

Union Address Information Table (PORUNIN)

The Phone Number of the **Telephone** field has been expanded to accommodate 12 characters on the following forms and table.

Affected Forms and Table

Union Location Rules Form (PTRUNLO)

Person Experience Form (PPAEXPR)

Union Address Information Table (PORUNIN)

The Phone Extension of the **Telephone** field has been expanded to accommodate 10 characters on the following forms and table.

Affected Forms and Table

Union Location Rules Form (PTRUNLO)

Person Experience Form (PPAEXPR)

Union Address Information Table (PORUNIN)

The **Email** field has been expanded to 128 characters on the following form and table.

Affected Form and Table

Union Location Rules Form (PTRUNLO)

Union Address Information Table (PORUNIN)

House Numbers are now included as a part of the Address field. Accordingly, new *database columns* have been added to the following forms.

Affected Forms

Union Location Rules Form (PTRUNLO)
Location Rules Form (PTRLCDE)

The **Phone** field now accommodates the country code. New database columns have been added to the tables associated with the following forms.

Affected Forms and Table

Union Location Rules Form (PTRUNLO)
Person Experience Form (PPAEXPR)
Location Rules Form (PTRLCDE)

New *database columns* have been added to prefix a surname to the tables associated with the following forms.

Affected Forms

Cobra Beneficiary Form (PCABENE)
Beneficiary Form (PDABENE)
Foreign Person 1042S Form (PXR1042)
1042-S Upload Process (XPEP1042)
California STRS F-496 Activity Form (PDAF496)
Report of Payroll Activity (PDPF496)
California STRS Status/Name Change Maintenance Form (PDAMR87)
California STRS MR-87 Report (PDPMR87)
California PERS Monthly Report of Contributions (PDAPERS)
Report of Payroll Contribution (PDPPERS)

The following Electronic Approval forms have been modified to accommodate for the field expansions.

Affected Forms and Packages

Electronic Personnel Action Form (NOAEPAF)
Electronic Approval Summary Form (NOAAPSM)
Electronic Approval Routing Rules Form (NTRROUT)
Electronic Approval Proxy Rules Form (NTRPROX)
Electronic Approval Level Rules Form (NTRALVL)
nokepaf
nokedit

Affected Forms and Packages

noqmenu

poqmenu

The maximum length of the social security number has been increased to 15 characters. This affects the following tables, forms and processes.

Affected Tables, Forms, and Processes

Dependent and Beneficiary Repeating Table (PDRBENE)

F-496 Required Data Elements Table (PDRF496)

MR-87 Required Data Elements Table (PDRMR87)

California PERS Report of Payroll Contributions Required Data Elements Table (PDRPERS)

1042S Information Upload Repeating Table (PER1042)

Beneficiaries/Dependents Table (PDRBEHS)

Employee Assignment Data Table (PERASGN)

CA MIS Demographic Table (PERDEMO)

Individual Information Upload Repeating Table (PERINDV)

Employee Assignment Data Table (PERNASG)

One-Time Payment Form (PEA1PAY)

New Hire Form (PEAHIRE)

Identification Form (PPAIDEN)

Check/Direct Deposit Print Process (PHPCHEK and PHPCHKL)

8 Support for Internationalization-Technical



Changed Tables

The following database tables were modified for internationalization. The length of existing fields were increased and new columns were added as required.

NORTRAN

Database Column	Null?	Data Type
NORTRAN_VALUE		VARCHAR2(500 CHAR)

PATRECR

Database Column	Null?	Data Type
PATRECR_CITY		VARCHAR2(50 CHAR)

PCRBENE

Database Column	Null?	Data Type
PCRBENE_BENE_MI		VARCHAR2(60 CHAR)
PCRBENE_BENE_FIRST_NAME		VARCHAR2(60 CHAR)
PCRBENE_BENE_LAST_NAME		VARCHAR2(60 CHAR)
PCRBENE_SURNAME_PREFIX		VARCHAR2(60 CHAR)

PDR1042

Database Column	Null?	Data Type
PDR1042_LAST_NAME		VARCHAR2(60 CHAR)
PDR1042_FIRST_NAME		VARCHAR2(60 CHAR)
PDR1042_MI		VARCHAR2(60 CHAR)
PDR1042_SSN		VARCHAR2(15 CHAR)
PDR1042_SURNAME_PREFIX		VARCHAR2(60 CHAR)

PDRBEHS

Database Column	Null?	Data Type
PDRBEHS_BENE_FIRST_NAME		VARCHAR2(60 CHAR)
PDRBEHS_BENE_MI		VARCHAR2(60 CHAR)
PDRBEHS_SSN		VARCHAR2(15 CHAR)
PDRBEHS_SURNAME_PREFIX		VARCHAR2(60 CHAR)

PDRBENE

Database Column	Null?	Data Type
PDRBENE_BENE_FIRST_NAME		VARCHAR2(60 CHAR)
PDRBENE_BENE_MI		VARCHAR2(60 CHAR)
PDRBENE_SSN		VARCHAR2(15 CHAR)
PDRBENE_SURNAME_PREFIX		VARCHAR2(60 CHAR)

PDRF496

Database Column	Null?	Data Type
PDRF496_FIRST_NAME		VARCHAR2(60 CHAR)
PDRF496_MI		VARCHAR2(60 CHAR)
PDRF496_SSN		VARCHAR2(15 CHAR)
PDRF496_SURNAME_PREFIX		VARCHAR2(60 CHAR)

PDRMR87

Database Column	Null?	Data Type
PDRMR87_FIRST_NAME		VARCHAR2(60 CHAR)
PDRMR87_MI		VARCHAR2(60 CHAR)
PDRMR87_SSN		VARCHAR2(15 CHAR)
PDRMR87_SURNAME_PREFIX		VARCHAR2(60 CHAR)

PDRPERS

Database Column	Null?	Data Type
PDRPERS_FIRST_NAME		VARCHAR2(60 CHAR)
PDRPERS_MI		VARCHAR2(60 CHAR)
PDRPERS_SSN		VARCHAR2(15 CHAR)
PDRPERS_SURNAME_PREFIX		VARCHAR2(60 CHAR)

PER1042

Database Column	Null?	Data Type
PER1042_FIRST_NAME		VARCHAR2(60 CHAR)
PER1042_MI		VARCHAR2(60 CHAR)
PER1042_SSN		VARCHAR2(15 CHAR)
PER1042_SURNAME_PREFIX		VARCHAR2(60 CHAR)

PERASGN

Database Column	Null?	Data Type
PERASGN_SSN		VARCHAR2(15 CHAR)

PERDEMO

Database Column	Null?	Data Type
PERDEMO_SSN		VARCHAR2(15 CHAR)

PEREE04

Database Column	Null?	Data Type
PEREE04_CITY		VARCHAR2(50 CHAR)

PEREE05

Database Column	Null?	Data Type
PEREE05_CITY	NOT NULL	VARCHAR2(50 CHAR)

PEREE06

Database Column	Null?	Data Type
PEREE06_CITY		VARCHAR2(50 CHAR)

PERINDV

Database Column	Null?	Data Type
PERINDV_FIRST_NAME		VARCHAR2(60 CHAR)
PERINDV_MI		VARCHAR2(60 CHAR)
PERINDV_SSN		VARCHAR2(15 CHAR)
PERINDV_US_STREET_LINE1		VARCHAR2(75 CHAR)
PERINDV_US_STREET_LINE2		VARCHAR2(75 CHAR)
PERINDV_US_STREET_LINE3		VARCHAR2(75 CHAR)
PERINDV_US_CITY		VARCHAR2(50 CHAR)
PERINDV_US_ZIP		VARCHAR2(30 CHAR)
PERINDV_FR_STREET_LINE1		VARCHAR2(75 CHAR)
PERINDV_FR_STREET_LINE2		VARCHAR2(75 CHAR)
PERINDV_FR_STREET_LINE3		VARCHAR2(75 CHAR)
PERINDV_FR_CITY		VARCHAR2(50 CHAR)
PERINDV_FR_ZIP		VARCHAR2(30 CHAR)
PERINDV_SURNAME_PREFIX		VARCHAR2(60 CHAR)

Database Column	Null?	Data Type
PERINDV_US_HOUSE_NUMBER		VARCHAR2(10 CHAR)
PERINDV_US_STREET_LINE4		VARCHAR2(75 CHAR)
PERINDV_FR_HOUSE_NUMBER		VARCHAR2(10 CHAR)
PERINDV_FR_STREET_LINE4		VARCHAR2(75 CHAR)

PETEDIR

Database Column	Null?	Data Type
PETEDIR_FIRST_NAME	NOT NULL	VARCHAR2(60 CHAR)
PETEDIR_MI		VARCHAR2(60 CHAR)
PETEDIR_PREF_FIRST_NAME		VARCHAR2(60 CHAR)
PETEDIR_SEARCH_FIRST_NAME		VARCHAR2(60 CHAR)
PETEDIR_OFFICE_STREET_LINE1		VARCHAR2(75 CHAR)
PETEDIR_OFFICE_STREET_LINE2		VARCHAR2(75 CHAR)
PETEDIR_OFFICE_STREET_LINE3		VARCHAR2(75 CHAR)
PETEDIR_OFFICE_CITY		VARCHAR2(50 CHAR)
PETEDIR_OFFICE_ZIP		VARCHAR2(30 CHAR)
PETEDIR_PR_STREET_LINE1		VARCHAR2(75 CHAR)
PETEDIR_PR_STREET_LINE2		VARCHAR2(75 CHAR)
PETEDIR_PR_STREET_LINE3		VARCHAR2(75 CHAR)
PETEDIR_PR_CITY		VARCHAR2(50 CHAR)
PETEDIR_PR_ZIP		VARCHAR2(30 CHAR)
PETEDIR_SURNAME_PREFIX		VARCHAR2(60 CHAR)
PETEDIR_OFFICE_HOUSE_NUMBER		VARCHAR2(10 CHAR)
PETEDIR_OFFICE_STREET_LINE4		VARCHAR2(75 CHAR)
PETEDIR_PR_HOUSE_NUMBER		VARCHAR2(10 CHAR)
PETEDIR_PR_STREET_LINE4		VARCHAR2(75 CHAR)

PERNASG

Database Column	Null?	Data Type
PERNASG_SSN		VARCHAR2(15 CHAR)

PHRERRL

Database Column	Null?	Data Type
PHRERRL_FIRST_NAME_SEQ		VARCHAR2(60 CHAR)
PHRERRL_LAST_NAME_SEQ		VARCHAR2(60 CHAR)

PHRJOB

Database Column	Null?	Data Type
PHRJOB_FIRST_NAME_SEQ		VARCHAR2(60 CHAR)
PHRJOB_LAST_NAME_SEQ		VARCHAR2(60 CHAR)

PORUNIN

Database Column	Null?	Data Type
PORUNIN_STREET_LINE1		VARCHAR2(75 CHAR)
PORUNIN_STREET_LINE2		VARCHAR2(75 CHAR)
PORUNIN_STREET_LINE3		VARCHAR2(75 CHAR)
PORUNIN_CITY		VARCHAR2(50 CHAR)
PORUNIN_ZIPC_CODE		VARCHAR2(30 CHAR)
PORUNIN_PHONE_AREA		VARCHAR2(6 CHAR)
PORUNIN_PHONE_EXT		VARCHAR2(10 CHAR)
PORUNIN_EMAIL		VARCHAR2(128 CHAR)
PORUNIN_CTRY_CODE_PHONE		VARCHAR2(4 CHAR)
PORUNIN_HOUSE_NUMBER		VARCHAR2(10 CHAR)
PORUNIN_STREET_LINE4		VARCHAR2(75 CHAR)

PPREXPE

Database Column	Null?	Data Type
PPREXPE_SUPER_PHONE_AREA		VARCHAR2(6 CHAR)
PPREXPE_SUPER_PHONE_EXT		VARCHAR2(10 CHAR)
PPREXPE_CTRY_CODE_SUPER_PHONE		VARCHAR2(4 CHAR)

PPRREFE

Database Column	Null?	Data Type
PPRREFE_PHONE_AREA		VARCHAR2(6 CHAR)
PPRREFE_PHONE_EXT		VARCHAR2(10 CHAR)
PPRREFE_CTRY_CODE_PHONE		VARCHAR2(4 CHAR)

PTREMPR

Database Column	Null?	Data Type
PTREMPR_CITY		VARCHAR2(50 CHAR)

PTRHSIL

Database Column	Null?	Data Type
PTRHSIL_CITY		VARCHAR2(50 CHAR)
PTRHSIL_ZIPC_CODE		VARCHAR2(30 CHAR)

PTRINST

Database Column	Null?	Data Type
PTRINST_COBRA_CITY	NOT NULL	VARCHAR2(50 CHAR)
PTRINST_ZIPC_CODE_COBRA		VARCHAR2(30 CHAR)

PTRJBLN

Database Column	Null?	Data Type
PTRJBLN_CITY		VARCHAR2(50 CHAR)
PTRJBLN_ZIPC_CODE		VARCHAR2(30 CHAR)

PTRLCDE

Database Column	Null?	Data Type
PTRLCDE_STREET_LINE1		VARCHAR2(75 CHAR)
PTRLCDE_STREET_LINE2		VARCHAR2(75 CHAR)
PTRLCDE_STREET_LINE3		VARCHAR2(75 CHAR)
PTRLCDE_STREET_LINE4		VARCHAR2(75 CHAR)
PTRLCDE_HOUSE_NUMBER		VARCHAR2(10 CHAR)
PTRLCDE_CITY		VARCHAR2(50 CHAR)
PTRLCDE_ZIPC_CODE		VARCHAR2(30 CHAR)

PTRSCHL

Database Column	Null?	Data Type
PTRSCHL_CITY	NOT NULL	VARCHAR2(50 CHAR)
PTRSCHL_ZIPC_CODE	NOT NULL	VARCHAR2(30 CHAR)

PTRUNLO

Database Column	Null?	Data Type
PTRUNLO_STREET_LINE1		VARCHAR2(75 CHAR)
PTRUNLO_STREET_LINE2		VARCHAR2(75 CHAR)
PTRUNLO_STREET_LINE3		VARCHAR2(75 CHAR)
PTRUNLO_CITY		VARCHAR2(50 CHAR)
PTRUNLO_ZIPC_CODE		VARCHAR2(30 CHAR)
PTRUNLO_PHONE_AREA		VARCHAR2(6 CHAR)

Database Column	Null?	Data Type
PTRUNLO_PHONE_EXT		VARCHAR2(10 CHAR)
PTRUNLO_EMAIL		VARCHAR2(128 CHAR)
PTRUNLO_CTRY_CODE_PHONE		VARCHAR2(4 CHAR)
PTRUNLO_HOUSE_NUMBER		VARCHAR2(10 CHAR)
PTRUNLO_STREET_LINE4		VARCHAR2(75 CHAR)

Changed Scripts

The following scripts modify existing Banner tables.

nortran_080000_01.sql

This script modifies the NORTRAN_VALUE column to 500 characters.

patrecr_080000_01.sql

This script modifies the length of the PATRECR_CITY column to 50 characters.

pcrbene_080000_01.sql

This script adds a new column PCRBENE_SURNAME_PREFIX of 60 characters in length.

pcrbene_080000_02.sql

This script modifies the field length of PCRBENE_BENE_MI, PCRBENE_BENE_FIRST_NAME, PCRBENE_BENE_LAST_NAME columns to 60 characters.

pcrbene_080000_03.sql

This script creates comments for the PCRBENE_SURNAME_PREFIX database column.

pdr1042_080000_01.sql

This script adds a new column PDR1042_SURNAME_PREFIX of 60 characters in length.

pdr1042_080000_02.sql

This script modifies the length of the PDR1042_MI, PDR1042_FIRST_NAME, and PDR1042_LAST_NAME columns to 60 characters, and increases the length of the PDR1042_SSN column to 15 characters.

pdr1042_080000_03.sql

This script adds a comment to the new column PDR1042_SURNAME_PREFIX.

pdrbehs_080000_01.sql

This script adds a new column PDRBEHS_SURNAME_PREFIX of 60 characters in length.

pdrbehs_080000_02.sql

This script modifies the length of the PDRBEHS_MI, PDRBEHS_FIRST_NAME, and PDRBEHS_LAST_NAME columns to 60 characters, and increases the length of the PDRBEHS_SSN column to 15 characters.

pdrbehs_080000_03.sql

This script adds a comment to the new column PDRBEHS_SURNAME_PREFIX.

pdrbene_080000_01.sql

This script adds a new column PDRBENE_SURNAME_PREFIX of 60 characters in length.

pdrbene_080000_02.sql

This script modifies the length of the PDRBENE_MI, PDRBENE_FIRST_NAME, and PDRBENE_LAST_NAME columns to 60 characters, and increases the length of the PDRBENE_SSN column to 15 characters.

pdrbene_080000_03.sql

This script adds a comment to the new column PDRBENE_SURNAME_PREFIX.

pdrbene_080000_04.sql

This script modifies the length of the PDRBENE_BENE_LAST_NAME columns to 60 characters.

pdrf496_080000_01.sql

This script adds a new column PDRF496_SURNAME_PREFIX of 60 characters in length.

pdrf496_080000_02.sql

This script modifies the length of the PDRF496_MI, PDRF496_FIRST_NAME, and PDRF496_LAST_NAME columns to 60 characters, and increases the length of the PDRF496_SSN column to 15 characters.

pdrf496_080000_03.sql

This script adds a comment to the new column PDRF496_SURNAME_PREFIX.

pdrmr87_080000_01.sql

This script adds a new column PDRMR87_SURNAME_PREFIX of 60 characters in length.

pdrmr87_080000_02.sql

This script modifies the length of the PDRMR87_MI, PDRMR87_FIRST_NAME, and PDRMR87_LAST_NAME columns to 60 characters, and increases the length of the PDRMR87_SSN column to 15 characters.

pdrmr87_080000_03.sql

This script adds a new column PDRMR87_SURNAME_PREFIX of 60 characters in length.

pdrpers_080000_01.sql

This script adds a new column PDRPERS_SURNAME_PREFIX of 60 characters in length.

pdrpers_080000_02.sql

This script modifies the length of the PDRPERS_MI, PDRPERS_FIRST_NAME, and PDRPERS_LAST_NAME columns to 60 characters, and increases the length of the PDRPERS_SSN column to 15 characters.

pdrpers_080000_03.sql

This script adds a new column PDRPERS_SURNAME_PREFIX of 60 characters in length.

pdvded1.sql

This view was modified for Oracle 10g performance tuning.

perasn_080000_01.sql

This script increases the length of the PER1042_SSN column to 15 characters.

per1042_080000_01.sql

This script adds a new column PER1042_SURNAME_PREFIX of 60 characters in length.

per1042_080000_02.sql

This script modifies the length of the PER1042_MI and PER1042_FIRST_NAME columns to 60 characters, and increases the length of the PER1042_SSN column to 15 characters.

per1042_080000_03.sql

This script adds a comment to the new column PDR1042_SURNAME_PREFIX.

perdemo_080000_01.sql

This script increases the length of the PERDEMO_SSN column to 15 characters.

pereeo4_080000_01.sql

This script increases the length of the PEREE04_CITY column to 50 characters.

pereeo5_080000_01.sql

This script increases the length of the PEREE05_CITY column to 50 characters.

perindv_080000_01.sql

This script adds new database columns to the PERINDV table.

perindv_080000_02.sql

This script modifies the existing columns of the PERINDV table.

perindv_080000_03.sql

This script adds column comments to the PERINDV table for internationalization.

pernasg_080000_01.sql

This script increases the length of the PERNASG_SSN column to 15 characters.

petedir_080000_01.sql

This script adds new columns for internationalization.

petedir_080000_03.sql

This script adds column comments to the PETEDIR table for internationalization.

phrerrl_080000_01.sql

This script increases the length of the database columns, PHRERRL_FIRST_NAME_SEQ and PHRERRL_LAST_NAME_SEQ to 60 characters.

phrjobs_080000_01.sql

This script increases the length of the database columns, PHRJOB_S_FIRST_NAME_SEQ and PHRJOB_S_LAST_NAME_SEQ to 60 characters.

porunin_080000_01.sql

This script adds three new columns, PORUNIN_CTRY_CODE_PHONE, PORUNIN_HOUSE_NUMBER, and PORUNIN_STREET_LINE4 to the PORUNIN table.

porunin_080000_02.sql

This script modifies the existing columns of the PORUNIN table for internationalization.

porunin_080000_03.sql

This script adds column comments to the PORUNIN table for internationalization.

pprexpe_080000_01.sql

This script adds a new column, PPREXPE_CTRY_CODE_SUPER_PHONE, to the PPREXPE table.

pprexpe_080000_02.sql

This script increases the length of PPREXPE_SUPER_PHONE_EXT column to 10 characters, PPREXPE_SUPER_PHONE_NUMBER to 12 characters, and PPREXPE_SUPER_PHONE_AREA to 6 characters.

pprexpe_080000_03.sql

This script adds column comments to the PPREXPE table for internationalization.

pprrefe_080000_01.sql

This script adds a new column, PPRREFE_CTRY_CODE_SUPER_PHONE, to the PPREXPE table.

pprrefe_080000_02.sql

This script increases the length of PPRREFE_PHONE_EXT column to 10 characters, PPRREFE_PHONE_NUMBER to 12 characters, and PPRREFE_PHONE_AREA to 6 characters.

pprexpe_080000_03.sql

This script adds column comments to the PPRREFE table for internationalization.

ptrempr_080000_01.sql

This script increases the length of the PTREMPR_CITY column to 50 characters.

ptrhsil_080000_01.sql

This script modifies the length of the PTRHSIL_CITY column to 50 characters, and PTRHSIL_ZIPC_CODE to 30 characters.

ptrinst_080000_05.sql

This script modifies the length of the PTRINST_CITY column to 50 characters, and PTRINST_ZIPC_CODE to 30 characters.

ptrjbln_080000_01.sql

This script modifies the length of the PTRJBLN_CITY column to 50 characters, and PTRJBLN_ZIPC_CODE to 30 characters.

ptrlcde_080000_01.sql

This script adds two new columns, PTRLCDE_HOUSE_NUMBER, and PTRLCDE_STREET_LINE4 to the PTRLCDE table.

ptrlcde_080000_02.sql

This script modifies the existing columns of the PTRLCDE table for internationalization.

ptrlcde_080000_03.sql

This script adds column comments to the PTRLCDE table for internationalization.

ptrunlo_080000_01.sql

This script adds three new columns, PTRUNLO_CTRY_CODE_PHONE, PTRLCDE_HOUSE_NUMBER, and PTRLCDE_STREET_LINE4 to the PTRLCDE table.

ptrunlo_080000_02.sql

This script modifies the existing columns of the PTRUNLO table for internationalization.

ptrunlo_080000_03.sql

This script adds column comments to the PTRUNLO table for internationalization.

9 Multiple Race and Ethnicity Data Entry in EPAFs-Functional



Overview

In Human Resources Release 7.1.2, the functionality of the Identification Form (PPAIDEN) was enhanced to associate a person with multiple race categories. In Human Resources 8.0, this functionality has been extended to support data entry of race and ethnicity information through EPAFs.

Race and ethnicity information can now be added through Electronic Personnel Forms (EPAFs) on Internet-Native Banner, as well as Self-Service Banner.

Accordingly, new seed data has been added to the field information block of the Electronic Approvals Usage Rules Form (NTRAUSG). For more details refer to the seed data script, on page [259](#) of this release guide.

New Task

Process Multiple Race and Ethnicity Information Using EPAFs

1. Run the script `ntraufdi80000.sql` to add new seed data to the field level block of NTRAUSG. This script is located in the `...banner\posnctl\dml` directory.
2. Set up a new approval type for race on Electronic Approval Type Rules Form (NTRAPTY).
3. Set up a new approval category for race and ethnicity on Electronic Approval Category Rules Form (NTRACAT).
4. On the Electronic Personnel Action Form (NOAEPAF) create or update EPAFs as follows:
 - 4.1. In the Key block, select the approval category established in Step 3.
 - 4.2. Add new values for ethnicity codes.
 - 4.3. Follow standard procedures to route and submit the EPAF to the approval queue.
5. Run the Electronic Approvals Mass Apply Process (NOPEAMA).
6. Ensure that the EPAF transaction status is *Complete* on NOAEPAF.

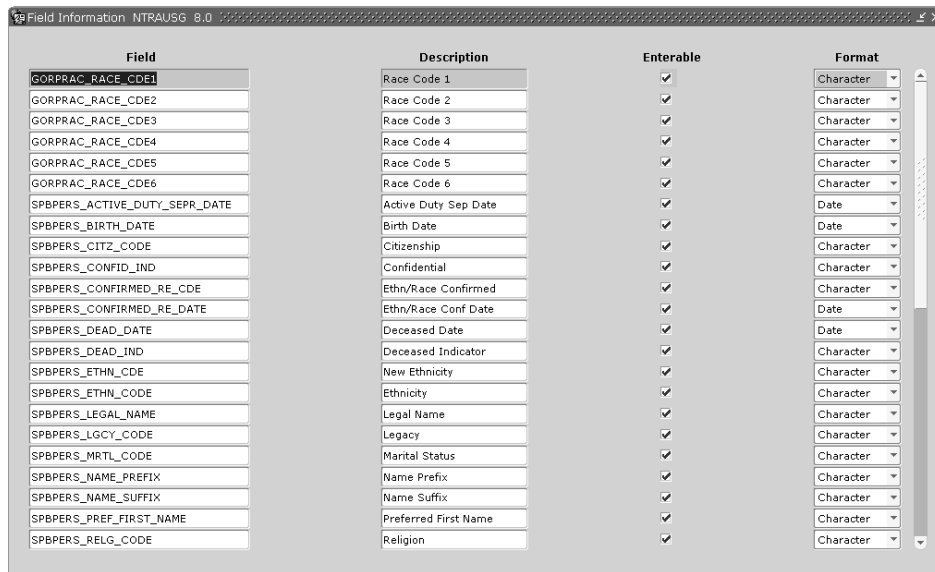
Changed Form

Electronic Approvals Usage Rules Form (NTRAUSG)

Six new data entry fields have been added by the seed script, `ntraufdi80000.sql` to the Field Information Block Window of the Electronic Approvals Usage Rules Form (NTRAUSG).

These include:

- GORPRAC_RACE_CDE1
- GORPRAC_RACE_CDE2
- GORPRAC_RACE_CDE3
- GORPRAC_RACE_CDE4
- GORPRAC_RACE_CDE5
- GORPRAC_RACE_CDE6



Field	Description	Enterable	Format
GORPRAC_RACE_CDE1	Race Code 1	<input checked="" type="checkbox"/>	Character
GORPRAC_RACE_CDE2	Race Code 2	<input checked="" type="checkbox"/>	Character
GORPRAC_RACE_CDE3	Race Code 3	<input checked="" type="checkbox"/>	Character
GORPRAC_RACE_CDE4	Race Code 4	<input checked="" type="checkbox"/>	Character
GORPRAC_RACE_CDE5	Race Code 5	<input checked="" type="checkbox"/>	Character
GORPRAC_RACE_CDE6	Race Code 6	<input checked="" type="checkbox"/>	Character
SPBPERS_ACTIVE_DUTY_SEPR_DATE	Active Duty Sep Date	<input checked="" type="checkbox"/>	Date
SPBPERS_BIRTH_DATE	Birth Date	<input checked="" type="checkbox"/>	Date
SPBPERS_CITZ_CODE	Citizenship	<input checked="" type="checkbox"/>	Character
SPBPERS_CONFID_IND	Confidential	<input checked="" type="checkbox"/>	Character
SPBPERS_CONFIRMED_RE_CDE	Ethn/Race Confirmed	<input checked="" type="checkbox"/>	Character
SPBPERS_CONFIRMED_RE_DATE	Ethn/Race Conf Date	<input checked="" type="checkbox"/>	Date
SPBPERS_DEAD_DATE	Deceased Date	<input checked="" type="checkbox"/>	Date
SPBPERS_DEAD_IND	Deceased Indicator	<input checked="" type="checkbox"/>	Character
SPBPERS_ETHN_CDE	New Ethnicity	<input checked="" type="checkbox"/>	Character
SPBPERS_ETHN_CODE	Ethnicity	<input checked="" type="checkbox"/>	Character
SPBPERS_LEGAL_NAME	Legal Name	<input checked="" type="checkbox"/>	Character
SPBPERS_LGCY_CODE	Legacy	<input checked="" type="checkbox"/>	Character
SPBPERS_MRTL_CODE	Marital Status	<input checked="" type="checkbox"/>	Character
SPBPERS_NAME_PREFIX	Name Prefix	<input checked="" type="checkbox"/>	Character
SPBPERS_NAME_SUFFIX	Name Suffix	<input checked="" type="checkbox"/>	Character
SPBPERS_PREF_FIRST_NAME	Preferred First Name	<input checked="" type="checkbox"/>	Character
SPBPERS_RELG_CODE	Religion	<input checked="" type="checkbox"/>	Character



10 Multiple Race and Ethnicity Data Entry in EPAFs-Technical



Changed Package

nokedit0.sql

The procedure `p_apply_defaults` has been modified if Race and Ethnicity Confirmed is Yes and the Confirmed Date is null, then the Confirmed date defaults to the System Date. If Ethnicity and Race is not confirmed, the date is cleared.

The `p_mass_edit_array` procedure has been modified to get New Ehtnicity and Races.

The `p_process_edits` procedure has been modified to call `nokepcr.f_minimal_bio_info_exists` and `nokepcr.f_citz_code_exists` for bio and address validation.

The `p_process_initial_edits` procedure has been modified to include Race edits.

nokedit1.sql

The procedure `p_apply_defaults` has been modified if Race and Ethnicity Confirmed is Yes and the Confirmed Date is null, then the Confirmed date defaults to the System Date. If Ethnicity and Race is not confirmed, the date is cleared.

The `p_mass_edit_array` procedure has been modified to get New Ehtnicity and Races.

The `p_process_edits` procedure has been modified to call `nokepcr.f_minimal_bio_info_exists` and `nokepcr.f_citz_code_exists` for bio and address validation.

The `p_process_initial_edits` procedure has been modified to include Race edits.

nokepa1.sql

Functions `f_get_gorprac_race`, `f_get_prac_field_name`, `f_get_max_prac_field_seq`, `f_is_race_field`, `f_open_aufd_race_field_rc`, and procedure `p_initial_edit_gorprac` have been added.

nokepaf.sql

`const_prac_field_name`, `field_rectype`, `race_array_type`, functions `f_get_gorprac_race`, `f_get_prac_field_name`, `f_get_max_prac_field_seq`, `f_is_race_field`, `f_open_aufd_race_field_rc`, and procedure `p_initial_edit_gorprac` have been added to this package.

nokepc1.sql

The following functions have been added to this package: `f_minimal_bio_info_exists`, `f_citz_code_exists`, `f_race_ethn_exists`, `f_open_gorrace_rc`, `f_get_gorprac_field`.

Function `p_chk_field_length` has been modified to include table owner GENERAL for GORPRAC table.

nokepcr.sql

Functions `f_minimal_bio_info_exists`, `f_citz_code_exists`, `f_race_ethn_exists`, `f_open_gorrace_rc`, and `f_get_gorprac_field` have been added to this package.

noklis1.sql

A hard coded list has been added for SPBPERS_ETHN_CDE.

nokmup1.sql

The `p_process_spbpers_rec` procedure has been modified to include the following race/ethnicity fields: `spbpers_ethn_cde`, `spbpers_confirmed_re_cde`, `spbpers_confirmed_re_date`, `nokepaf.p_delete_all_person_race`, `gb_person_race.p_create`. New variables `lv_index`, `lv_race_cde`, `lv_rowid_gorprac` have also been added.

nokmupd.sql

The `p_process_gorprac_rec` procedure has been added to process race records.

nopnssn.sql

`edit_3`, has been modified to validate bio info to include New Ethnicity and Race.

Changed API Packages

pokb_employee_r1.sql

The function `f_minimal_bio_info_exists` was modified to call `nokepcr.f_minimal_bio_info_exists` and `nokepcr.f_citz_code_exists` for biographic and address validation.

pokb_employee_s0.sql

A new error message was added for incomplete new ethnicity/race data.

pokb_employee_s1.sql

A new error message was added for incomplete new ethnicity/race data.

New Seed Data

`ntraufdi_080000_01.sql`

This script adds seed data to the following columns of the NTRAUFD table corresponding to the NTRAUSG form.

NTRAUFD_CODE	NTRAUFD_DESC	NTRAUFD_FORMAT _IND	NTRAUFD_ENTERAB LE_IND	NTRAUFD_ACTIVITY_ DATE
SPBPERS_ETHN_CDE	New Ethnicity	C	Y	sysdate
SPBPERS_CONFIRMED_RE_CDE	Ethn/Race Confirmed	C	Y	sysdate
SPBPERS_CONFIRMED_RE_DATE	Ethn Confirmed Date	D	Y	sysdate
GORPRAC_RACE_CDE1	Race Code 1	C	Y	sysdate
GORPRAC_RACE_CDE2	Race Code 2	C	Y	sysdate
GORPRAC_RACE_CDE3	Race Code 3	C	Y	sysdate
GORPRAC_RACE_CDE4	Race Code 4	C	Y	sysdate
GORPRAC_RACE_CDE5	Race Code 5	C	Y	sysdate
GORPRAC_RACE_CDE6	Race Code 6	C	Y	sysdate



11 Miscellaneous Enhancements



Changed Identification Form (PPAIDEN)

A new window, the Additional Identification window has been added to the Identification Form (PPAIDEN). Select the Additional Identification tab to access this window.

This window is used to enter extra IDs for a person. Each additional ID must be assigned an ID type. You can set up additional ID types using the Additional Identification Type Validation Form (GTVADID). Please refer to the *Banner General 8.0 Release Guide* for more information on using additional IDs.

Note

If your institution is already using Banner's tab-level security feature, you may need to set up tab-level security records for the Additional Identification tab/window. Otherwise, any user with security access to PPAIDEN can access the Additional Identification tab/window. ■

For more details refer to the topic, "Tab-Level Security" in the *Banner Security Administration Handbook* for details.

Tabbed Forms

New tabs and tab navigation has been added to the following Human Resources Forms.

Position Description Form (PAAPDES)

Two new tabs have been created to access the corresponding windows of the Position Description Form (PAAPDES)

- Position Description
- Position Description Detail

Refer to the online help of Banner Human Resources for more information on each tab/window.

Code	Activity Date	
A0008	Administer long range goals	11-DEC-2007

Position Requirements Form (PAAPREQ)

Three new tabs have been created to access the corresponding windows of the Position Requirements Form (PAAPREQ)

- Requirements
- Exams/Certifications/Endorsements
- Weighting Factors

The screenshot shows the PAAPREQ 8.0 application window. At the top, the title bar reads "Position Requirements PAAPREQ 8.0". Below the title bar, there are two fields: "Position Number:" with the value "A00012" and a dropdown menu showing "Dean College Arts & Sciences". Below this, there are three tabs: "Requirements" (selected), "Exams / Certifications / Endorsements", and "Weighting Factors".

The main content area is divided into several sections:

- Skill Section:** Contains a table with columns for Skill, Indicator, Skill Level, and Indicator. The first row shows "000005 Academic Teaching Experience" with an indicator of "Required", a skill level of "3 Tenured", and an indicator of "Optional".
- Diploma or Degree Section:** Contains a table with columns for Degree, Indicator, Level, and Indicator. The first row shows ">> PHD Doctor of Philosophy" with an indicator of "Optional", a level of "DR Doctorate", and an indicator of "Optional".
- Major Section:** Contains a table with columns for Major, Indicator, and Indicator. The first row shows "ARTL Liberal Arts" with an indicator of "Optional".
- Minor Section:** Contains a table with columns for Minor and Indicator. The first row is empty.
- Area of Concentration Section:** Contains a table with columns for Area of Concentration and Indicator. The first row is empty.

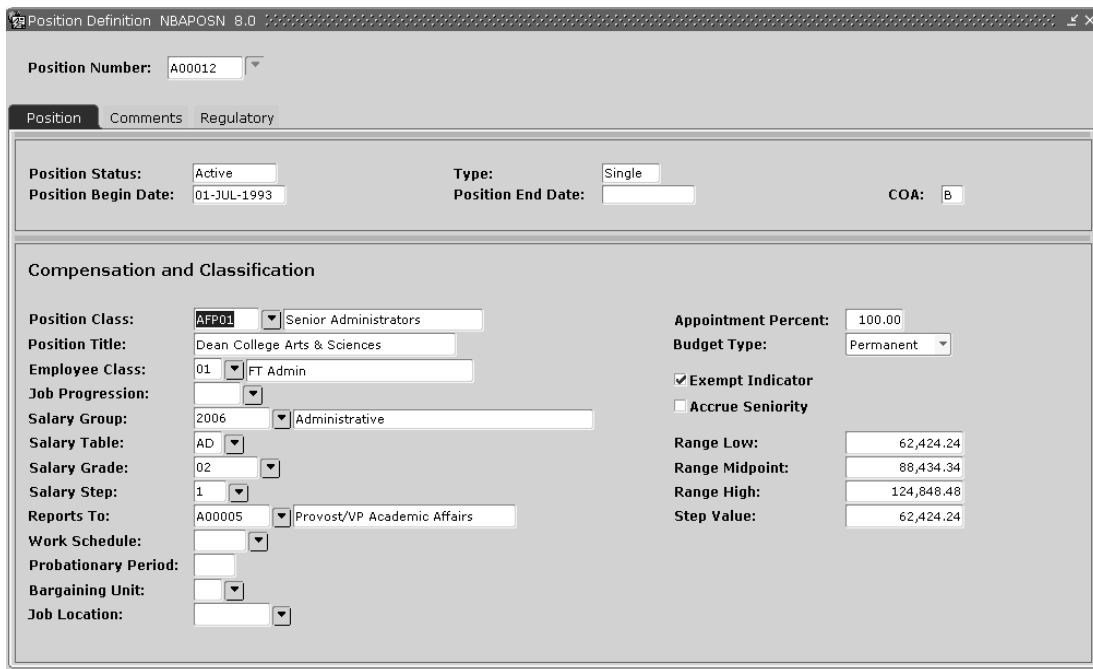
Refer to the online help of Banner Human Resources for more information on each tab/window.

Position Definition Form (NBAPOSN)

Three new tabs have been created to access the corresponding windows of the Position Definition Form (NBAPOSN).

- Position
- Comments
- Regulatory

Refer to the online help of Banner Human Resources for more information on each tab/window.



Position Definition NBAPOSN 8.0

Position Number: A00012

Position Comments Regulatory

Position Status: Active Type: Single
Position Begin Date: 01-JUL-1993 Position End Date: COA: B

Compensation and Classification

Position Class: AFP01 Senior Administrators
Position Title: Dean College Arts & Sciences
Employee Class: 01 FT Admin
Job Progression:
Salary Group: 2006 Administrative
Salary Table: AD
Salary Grade: 02
Salary Step: 1
Reports To: A00005 Provost/VP Academic Affairs
Work Schedule:
Probationary Period:
Bargaining Unit:
Job Location:

Appointment Percent: 100.00
Budget Type: Permanent
 Exempt Indicator
 Accrue Seniority
Range Low: 62,424.24
Range Midpoint: 88,434.34
Range High: 124,848.48
Step Value: 62,424.24

Employee FMLA Information (PEAFMLA)

Three new tabs have been created to access the corresponding windows of the Employee FMLA Information (PEAFMLA):

- Record Detail
- Leave Tracking
- Comments

Refer to the online help of Banner Human Resources for detailed information on each tab/window.

Employee FMLA Information PEAFMLA 8.0

ID: 555666555 Mr. Austin David West
Year: 2006 Year Begin: 01-JAN-2006 FMLA Year Indicator: Calendar Year End: 01-DEC-2006

Record Detail Leave Tracking Comments

FMLA Base Record

FMLA Units Indicator: Weeks Maximum FMLA Units Allowed: 12
 Spouse Employed Spouse ID:

FMLA Usage

Leave Effective Begin Date: 01-JAN-2006 Leave Requested Date: 01-JAN-2006
Leave Effective End Date: 31-JAN-2006 Eligibility Notification Date: 01-JAN-2006

Status Date: 01-JAN-2006 Approval ID:
Status: AP FMLA Leave Approved Approval Date:
Reason: HC Serious Health Condition of Child

Eligible for Benefit Continuation
 Medical Certification Received
Received Date: 01-JAN-2006

Scheduled Back to Work **Actual Back to Work**
Status: Full Time Part Time Status: Full Time Part Time
Scheduled Date: 05-FEB-2008 Actual Date:

Employee Class Rules Form (PTRECLS)

Seven new tabs have been created to access the corresponding windows of the Employee Class Rules Form (PTRECLS):

- General
- Time Entry Rules
- Position Defaults
- Regulatory
- Eligible Earnings
- Other Leave Categories
- Other Benefit Categories

Refer to the online help of Banner Human Resources for detailed information on each tab/window.

The screenshot displays the 'Employee Class Rules' window for PTRECLS 8.0. The 'Employee Class' is set to '02'. The 'General' tab is active, showing the following fields:

- Employee Class Descriptions:**
 - Short: Profesnl
 - Long: FT Professional
- Employee Defaults:**
 - Leave Category: A1
 - Benefit Category: F1 Full Time Employees
 - Employee Group:
 - Full-Time or Part-Time Status: Full Time
- Job Defaults:**
 - Default Hours:
 - Hours per Day: 8.00
 - Hours per Pay: 80.00
 - Payroll ID: MN Monthly
 - Premium Pay:
 - Longevity:
 - Work Schedule:
 - Deferred Pay:
 - Employer: BU Banner University
- Payroll Calculation:**
 - Salary Indicator: Salaried
 - FLSA Method: N/A
 - FLSA Period:
 - Shift Code:

Benefit Category Rules Form (PTRBCAT)

Three new tabs have been created to access the corresponding windows of the Benefit Category Rules Form (PTRBCAT):

- Valid Benefits/Deductions/Benefit Statement Set-up
- Default Values
- Web Rules

Refer to the online help of Banner Human Resources for detailed information on each tab/window.

Benefit or Deduction	Required Indicator	Quick Setup	Payroll Begin Date Indicator	Coverage End Date Indicator	Check Sequence Number	Defaults Exist
15L Schlr/Filwsp Living	<input type="checkbox"/>	Manual	User Specified	User Specified	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15N Schl/Filw Nontreaty	<input type="checkbox"/>	Manual	User Specified	User Specified	<input type="checkbox"/>	<input type="checkbox"/>
15Q Schlr/Filwsh Qualified	<input type="checkbox"/>	Manual	User Specified	User Specified	<input type="checkbox"/>	<input type="checkbox"/>
401 Section 401(k) Deferral	<input type="checkbox"/>	Manual	User Specified	User Specified	<input type="checkbox"/>	<input type="checkbox"/>
403 Section 403(b) Deferral	<input type="checkbox"/>	Manual	User Specified	User Specified	<input type="checkbox"/>	<input type="checkbox"/>
408 Section 408(k)(6) SEP	<input type="checkbox"/>	Manual	User Specified	User Specified	<input type="checkbox"/>	<input type="checkbox"/>
409 Section 409A Deferred Comp	<input type="checkbox"/>	Manual	User Specified	User Specified	<input type="checkbox"/>	<input type="checkbox"/>
457 Section 457(b) Deferred Comp	<input type="checkbox"/>	Manual	User Specified	User Specified	<input type="checkbox"/>	<input type="checkbox"/>
ADT ADT Alarm Deduction	<input type="checkbox"/>	Manual	User Specified	User Specified	<input type="checkbox"/>	<input type="checkbox"/>
AP1 Amy's Test 403b calc rule 16	<input type="checkbox"/>	Manual	User Specified	User Specified	<input type="checkbox"/>	<input type="checkbox"/>
AP2 Amy's test 403b calc rule 28	<input type="checkbox"/>	Manual	User Specified	User Specified	<input type="checkbox"/>	<input type="checkbox"/>
AP3 Amy's test 403b calc rule 29	<input type="checkbox"/>	Manual	User Specified	User Specified	<input type="checkbox"/>	<input type="checkbox"/>

Installation Rules Form (PTRINST)

Six new tabs or options have been created to access the corresponding windows of the Installation Rules Form (PTRINST):

- Installation
- Leave
- COBRA or FMLA
- California Pension or MIS
- Faculty
- One-Time Payment

The screenshot displays the 'Installation Rules PTRINST 8.1' window with the 'Installation' tab selected. The window is divided into several sections:

- Payroll or Finance Rules:**
 - Display Amount or Rate at Time Rules
 - Generate Records for Non-Scheduled Work Days
 - Payroll Interface Date:
 - Revoke Electronic W-2 Consent on Employee Termination
- FSA Grace Period:**
 - Additional Months:
 - Additional Days:
- Self-Service Information:**
 - Latest Year-End Statement to Display W-2 or T4:
 - Time Entry Certification Required in Self-Service
 - Employee May Update Direct Deposit Records
- Regulatory Rules:**
 - Temporary I-9 Limit Days:
- Tax Free Life Insurance:**
 - Employee:
 - Dependent:
 - SIN Validation:
- Security Level Activation Rules:**
 - Employer Security
 - Salary Security
 - Organization Security
 - Employee Class Security

Fringe Charge Back Rules Form (NTRFBLD)

Three new tabs have been created to access the corresponding windows of the Fringe Charge Back Rules Form (NTRFBLD):

- Installation Rules
- External Rules
- Labor Distribution Override

Refer to the online help of Banner Human Resources for detailed information on each tab/window.

Fringe Charge Back Rules NTRFBLD 8.0

Query Date: 01-NOV-2007

Installation Rules External Rules Labor Distribution Override

Effective Date: 01-JUL-2007

FOAPAL To Match On

COA	Index	Fund	Organization	Account	Program	Activity	Location	Fringe Rate	End Date
A				5120				12.000	
A				5210				8.000	
A				5252				12.000	
B		2158		6111				20.000	
B				6112				10.000	
B				6121				10.000	
B				6122				10.000	
E		BB2111						7.500	
E		BB2117						7.500	
E		BB2125						7.500	
E		BB2151						12.000	
E		BB2157						7.500	
E		BB2158						10.000	
E		BB2159						12.000	
G				5110				2.500	

Supplemental Data Engine

Supplemental Data Engine (SDE) is a simple way to add data fields to Banner forms. SDE allows you to store data that is not part of the existing Banner data model. For example, SDE can be used for the following:

- To add a comments field to record miscellaneous notes
- To add data that has been translated into different languages

No customization of Banner forms or tables is needed to capture and use additional data with SDE. The new data is displayed in a popup window, the Supplemental Data Window, and is stored in a supplemental data table. Because no customization is needed, supplemental data is generally not impacted by Banner upgrades.

Each supplemental data record created through SDE is tied to a specific Banner table, so any forms using that table will be able to access the same data through the Supplemental Data Window. Through SDE you can create additional fields associated with a specific Banner table but stored in a separate table, the Supplemental Data Table.



Tip

A new light bulb icon on the Banner toolbar indicates the presence of supplemental data. You can click the light bulb icon to open the Supplemental Data Window.

Although it is natural to think of supplemental data in terms of extra fields on Banner forms, SDE is tied to forms only indirectly.

There are several limitations of SDE, including the following:

- Not all tables, blocks, and forms work with SDE.
- The combination of SDE with Virtual Private Database (VPD) for use in Multi-Enterprise Processing is currently not supported.
- Masking is not currently supported with SDE. Supplemental data fields cannot be masked, concealed, or hidden.

For complete information about SDE, including detailed descriptions of the new forms, refer to the *Banner General 8.0 Release Guide*.

Enhanced PIN Maintenance Security

Banner General Release 8.0 includes an enhancement for user PIN (password) security. The following functionality is included in this enhancement.

- PINs are now stored only in encrypted form.

A cryptographic hash transforms the PIN before it is stored, so that the unencrypted password can never be retrieved from the database. For additional security, the PIN is “salted” before it is encrypted; that is, a randomly generated string is added to the PIN before encryption. When a user enters a PIN to gain access to the system, the user’s entered PIN is transformed using the same cryptographic PIN. The database checks for a match before the user can proceed.

- Institutions can now set and enforce standards for strong passwords.

Strong passwords are passwords which are long, complex, and nearly impossible to guess. Your institution can enforce strong password standards based on: the minimum and maximum permissible length of user PINs, the requirement that PINs include letters, digits, or both letters and digits, and the restriction of PIN reuse (number of days before a previous PIN can be reused).

- A new, more secure PIN reset mechanism has been established.

When a user forgets a password, the PIN reset can be requested by answering a series of security questions with answers that the user has previously provided. You can also decide whether users are allowed to generate their own security questions, or whether they must use standard questions established by the institution. The user’s answers are stored in encrypted form, just like the PIN.

A new PIN Questions Form (GOAQSTN) is included in this enhancement. The Enterprise PIN Preferences Form (GUAPPPFR), the Third Party Access Form (GOATPAC), and the Third Party Access Audit Form (GOATPAD) have been modified for the PIN security updates.

Please refer to the *Banner General 8.0 Release Guide* for more information on this enhancement.

Partial Data Masking

Banner 7.0 introduced the ability to hide, conceal, or mask the full contents of a field containing sensitive information. In addition, number and date fields could be partially masked.

Example

You could choose to display the month and date of a birthdate while masking the year. This solution required custom programming and was not usable in some forms and fields.

With Banner 8.0, the ability to partially mask a field has been extended to character fields. You can allow a specified number of characters at the right side or the left side of the field to remain readable, while the rest of the value is masked.

Example

You can choose to mask most of a **Social Security Number** field, while leaving just a few characters readable to allow a user to verify that the number in the field is the correct one.

This new partial character masking solution can be set up as easily as any other masking option, and replaces the limited character masking solution provided with Release 7.0.

To support partial character masking, two new fields have been added to the Data Display Mask Rules Form (GOTDMSK).

- **Partial Character Mask**
- **Partial Unmasked Length**

Note

For character items, the **Format Mask** field has been disabled. Instead of entering a format mask, you can use the **Partial Character Mask** and **Partial Unmasked Length** fields to mask a portion of the character data. ■

For additional detailed information about partial data masking, please refer to the *General 8.0 Release Guide*.

Documentation Changes

With the release of Banner 8.0, you will notice significant changes to the documentation.

- The look and feel of the documentation has been modernized. This new design incorporates new fonts, increased character size, and color to make the manuals easier to read and to use.
- Detailed forms information has been moved from the user guides into online help. This change will dramatically reduce the size of all user guides delivered with Banner 8.0.

 **Note**

A standalone version of the forms information in html format will also be delivered with the release, so you can continue to access forms information directly without first logging into Banner. ■

- For some products, defects information in the release guide now includes an abbreviated description of each defect correction. For additional details, refer to the supplemental text file delivered along with your release guides. This text file includes detailed problem, impact, and resolution information for each defect extracted directly from the Customer Support Center.

Obsolete Objects

The following objects are obsolete with Banner Human Resources and Position Control Release 8.0

Canadian Human Resources Objects

Over the last few years Canadian clients have installed the Canadian localization version of the Year-End Income Tax Reporting (YREND) for Banner Human Resources and Employee Self Service. This localization version replaces the Banner HR baseline Canadian Year-end processing and the T4 web page. Since this version is now used by all Canadian clients, the following Canadian year-end objects in baseline Banner HR are now obsolete. These objects will not be supported from this point forward and will not be included in the Banner 8.0 release and beyond.

- Canadian T4 Supplementary Report (PXRT4CN) (pxrt4cn.pc)
- Canadian T4A Supplementary Report (PXRT4AC) (pxrt4ac.pc)
- Canadian T4A-NR Supplementary Report (PXRT4AN) (pxrt4an.pc)
- Canadian T4 Magnetic Tape Process (XPMTT4) (pxpmtt4.pc)
- Canadian T4A Magnetic Tape Process (XPMTTA) (pxpmtta.pc)
- Canadian T4A-NR Magnetic Tape Process (XPMTTN) (pxpmttn.pc)
- Record of Employment Report (perroec.pc)

Obsolete Tables

Database tables corresponding to the above-mentioned Canadian HR forms are also obsolete.

- Canadian T4 Magnetic Tape Table (PXRMTT4)
- Canadian T4A Magnetic Tape Table (PXRMTTA)
- Canadian T4A-NR Magnetic Tape Table (PXRMTTN)
- Canadian T4 Supplementary Table (PXRT4SS)

Obsolete Table and Reports

The following Banner Human Resources reports are now obsolete with Release 8.0.

- EEO-1 Magnetic Tape Report (pereeo1.pc)
- EEO-1 Summary Report (pereeo11.pc, pereeo12.pc and pereeo13.pc)
- 1042-S Download Process (pdp1042.pc)
- 1042-S Extract Process (pxp1042.pc)
- Required Fields Repeating Table (PEREE01)

Obsolete Miscellaneous Scripts

The following scripts are now obsolete:

- pxr1042.com
- pxr1042.pl
- pxr1042.shl
- pxrw2us.com
- pxrw2us.pl
- pxrw2us.shl
- payformr2.bat
- payformr2.shl
- pereeo1.com
- pereeo1.pl
- pereeo1.shl
- pereeo6.pl
- pereeo6.shl
- pereeo11.com
- pereeo11.pl
- pereeo11.shl

- pxpmtpr.com
- pxpmtpr.shl
- pxpmtw2.com
- pxpmtw2.shl
- payroll.shl
- puasenv.shl

RPEs

The following RPEs have been delivered with Banner Human Resources 8.0.

NBPENCM

(CMS-RPE3882)

Request: Errors which occurred during the Budget Maintenance Process (NBPBUDM) need to be identified or reported in a visible manner.

There were two rows of error in NBPBUDM with the message:

No job labor distribution information could be found for: xxxx.

Since these were buried in the body of the report we did not find them until another process failed. Errors which occur should be written out to an error report or other process so they can be located and fixed.

Resolution: This RPE has been resolved with the creation of the new process, Encumbrance Maintenance Process (NBPENCM) in Position Control 8.0. The process will now print the ID with the error message in the .log file.

NBPENCM

(CMS-RPE38587)

Request: If a user was in the Job Labor forms when the Budget Maintenance Process (NBPBUDM) was running, the process would end in the middle of processing without aborting. In this situation, it would print the following message in the .lis file and exits normally:

One of the following forms was being updated at the start of or during the process. Process halted. Rerun later: NBAFISC NTRFINI NBAJOBS NTRFBLD NBIJLHS.

During processing, the program would try to acquire and release exclusive table locks on certain tables. This caused serious problems in trying to accurately and efficiently process HR encumbrances all the way through to Finance. If the program stopped in the middle of processing, only some of the encumbrances would be posted to Finance. When payroll calculations were run subsequently, expense transactions that reduce encumbrances would reject in Finance because no encumbrance would exist.

Resolution: This RPE has been resolved with the creation of the new Encumbrance Maintenance Process (NBPENCM).

Now, table locking occurs in the Encumbrance Maintenance Process (NBPENCM). The process will attempt to lock the NBRBJOB, NBRJOBS and NBRJLBD records for the ID to be processed.

If the lock operation fails, the report will print the ID with the error message in the .log file, skip that ID, and move to the next ID.

PHPCHEK

(RPE 1-2XDLN9)

PHPCHKL

Request: The PHPCHEK/PHPCHKL processes were not in compliance with Check 21 guidelines for printing numerical amounts.

Resolution: The PHPCHEK/PHPCHKL processes have been modified to print a maximum of 2 asterisks before the numeric amount in accordance with Check 21 guidelines.

PHPCHKL
PHPCHEK

(CMS-RPE32291)

Request: The PHPCHKL and PHPCHEK programs and any others where the SSN/SIN may be printed should have a parameter allowing for two or more options that control the display of SSN/SIN.

Possible options for printing the SSN/SIN should include the first two of the following options but others may feel that some of the other options, 3 through 6, may be useful:

1. Print SSN/SIN
2. Do not print SSN/SIN
3. Print, say, the last 4 digits
4. Print the full SIN/SSN on only the first pay stub. This may have to ignore SSN/SIN changes.
5. A combination of options 3 and 1 for all subsequent stubs
6. A combination of options 3 and 2 for all subsequent stubs

Resolution: When checks or direct deposit notices are printed, clients have the option to suppress printing of the SSS/SIN/TIN number. To accomplish this, a new parameter has been added to the Checks/Direct Deposit Print Process (PHPCHEK) and the Checks/Direct Deposit Print Process (PHPCHKL). The parameter for both processes is:

Parameter	Description
07	Suppress SSN/SIN/TIN on Check. Options are: Yes (Y) to Suppress No (N) to Print

(RPE 1-1W3OPV)

Request: The Mass Time Entry Process (PHPMTIM) was automatically overwriting all earnings in pay history.

Resolution: The process will now accept all earnings and evaluate to decide whether to add to pay history or not feed the data when records are added via Time Entry and the Mass Time Entry Form, PHAMTIM.

Examples

1. Records are in the Time Entry tables,
No records in the Mass Time Entry tables

PHPMTIM processes records from Time Entry and overwrites whatever is in pay history where the earn codes match.

2. Records are in the Time Entry tables, REG with shift 1
Records are in the Mass Time Entry tables, REG with shift 2

PHPMTIM processes records from Time Entry and the Mass Time tables and overwrites whatever is in pay history where the earn code and shift match.

3. Records are in the Time Entry tables, REG
Records are in the Mass Time Entry tables, SIC

PHPMTIM processes records from Time Entry and the Mass Time tables and overwrites whatever is in pay history where the earn code and shift match.

4. Records are in the Time Entry tables, REG with shift 1
Records are in the Mass Time Entry tables, REG with shift 1

PHPMTIM does not process records from Time Entry. The data in the Mass Time Entry tables will be processed and overwrite whatever is in pay history where the earn code and shift match. The time entry record will be set to *Complete*.

(CMS-RPE 4756)

Request: The **Default Begin Date** in the Key block of the Employee Benefit Deduction Set Up Form (PDABDSU) would default to the System Date on accessing the form initially. This could potentially result in deductions being added for an employee with the incorrect date.

Resolution: This has been corrected. The Item property has been modified to not default to the Sysdate on accessing the form initially.

12 Problem Resolutions



The following defects have been resolved in Banner Human Resources and Position Control, Release 8.0.

Rule Forms

Object	Number	Description
NTRFRNG	CMS-DFCT104805	<p>The form NTRFRNG contained hard-coded SEED numbers in the form level trigger G\$_VERIFY_ACCESS. This form, delivered with Position Control 7.1 was not referencing the GOQOLIB Security Seed numbers correctly. On changing the security seed numbers in GOQOLIB, the change would not reflect in NTRFRNG.</p> <p>As a result the generated NTRFRNG.FMX was not working with a database that had non-baseline seed numbers.</p> <p>Runtime error on NTRFRNG form was:</p> <p><i>*Error* Invalid password tried.</i></p>

Object	Number	Description
PTRBCAT	1-IPCVQ	<p>The PTRBCAT form allowed you to delete a deduction record even if there were active employee deductions on PDADEDN. The PHPTIME process would run without error or warning message that this situation had occurred. The deduction would not get selected for the payroll, and not inserted into PHRDEDN. Now, if you accessed the PDADEDN form to look at the employee's record you would receive the message that the deduction code was not valid for the employee's benefit category.</p> <p>The PTRBCAT form should not allow deletion if the deduction exists on PDADEDN.</p> <p>The correct procedure to terminate deduction eligibility is to add an End Date on PTRBCAT. This will prevent the assigning of that deduction code on PDADEDN. The PHPTIME process will edit the deductions that are currently active on PTRBCAT.</p>
PTRBDMC	1-OG2IJ	<p>The error message,</p> <p><i>FRM-40202: Field must be entered</i></p> <p>would display when removing existing deductions from the setup on PTRBDMC.</p>
PTRECLS	1-TL6FL	<p>The FLSA Period description was only partially displayed adjacent to the FLSA Method. It should be fully displayed.</p>
PTREMPR	CMS-DFCT94248	<p>The following fields should either be removed or their field edits allow for null values since they are not required for IPEDs reporting:</p> <ol style="list-style-type: none"> 1. EEOC Control # 2. Sector-This field is used by K-12 sites only 3. State Sequence Number-not used for any of the reports
PTRLCAT	1-15KGOS	<p>In the General Leave Category Block, the Print Sequence Number allowed 1 digit instead of 2 digits, as it is defined on the table.</p>

Applicant Tracking

Object	Number	Description
PAAAPOS	1-1JH0KP	Performing an execute query based on ID would not return the correct data. Information for the ID with the most current application date would be displayed.
PAAAPPL	1-1CTYGH	PAAAPPL must be consistent with PAAAPOS and allow the Status to be updated, rather than require a new record to be entered to affect a status change.

Benefits Administration

Object	Number	Description
PDABDSU	1-2ASP7Z	Deduction codes would not display in order on the first page of PDABDSU under Oracle 10g. This was due to the lack of an explicit order by statement.
PDABDSU	CMS-DFCT90899	<p>The value entered in the Default Begin Date in the Key block would not default to the Begin Date when you choose to establish the deduction</p> <p>For deductions that allowed entry of Amount 1, the form was not displaying the default value from PTRBCAT for Amount 1.</p>
PDABENE	1-BZWW6	<p>The form must prohibit updating of information based on the relationship type of E rather than relationship code. The Beneficiary Relationship Rule Form (PTRBREL) allowed you to enter any value in the relationship code field for a relationship type of Employee (E). When creating a new employee, PEAEMPL would insert a record into the beneficiary table automatically for the employee. The relationship code value inserted into the beneficiary table was based on relationship type E.</p> <p>Currently PDABENE would not allow information update on any record if the relationship code value is Self (S), or in other words the employee. The PDABENE form must be consistent with PTRBREL and PEAEMPL and allow the update of information where the relationship type is not E.</p>

Object	Number	Description
PDAEDN	1-GWH3F	<p>When giving an employee a new deduction, the pop up error message:</p> <p><i>FRM-50026: Date must be entered in a format like DD-MMM-RRRR</i></p> <p>was received multiple times if the date was entered as 040106 in the Key block of the form and did not tab off the field. The date entered in the Key would go missing and the System Date would be displayed in the Begin Date field.</p>
PDAEDN	1-1AHCCT	<p>In the original design of the product, any adjustment to 1042-S withholding amounts had to be processed through the Payroll Adjustment Form (PHAADJT) so that pay period exemption amounts could be enforced, and the breakdown of tax rates, treaty exemption codes, etc., could be entered to ensure accurate withholding and proper reporting.</p> <p>If a one-time add/replace amount on PDAEDN was entered, the required information for reporting was not captured, which could result in inaccurate reporting.</p> <p>An edit is needed on PDAEDN to prevent one-time add/replace amounts from being entered on the form if the deduction is associated with a 1042-S federal deduction (benefit/deduction type = 20).</p>
PDAEDN	CMS-DFCT85396	<p>Last paid date functionality was not checking the disposition of a Void event. This required you to manipulate a deduction record prior to the Last Paid Date.</p>
PEAFDED	1-LVKHA	<p>Form was updating the employee deduction amounts 1 and 2 on PDAEDN for all effective dated records. This happened if the signature date was updated (after saving the original date).</p>
PEAFDED	CMS-DFCT90796	<p>If a wrong deduction code on the Constituent Pledge Payroll Deduction Form (PEAFDED) was entered there was no recovery from this error. The form should allow you to correct a data entry error if the employee had not been paid with this deduction.</p>

Biographic/Demographic Administration

Object	Number	Description
PPAGENL	1-1O10F3	In Payroll 7.2 there was a package or packages (ppkb_driver_lic0?) that attempted to set the pprdlic_issue_date field in pprdlic to 01-JAN-1900 if it was blank, but the field was being set to 01-JAN-12.

Faculty Administration

Object	Number	Description
PEAFAC	1-11PF0J	When creating a new faculty record, if you simply entered the Primary Activity and Discipline and saved, the form would generate the appropriate error message (Original Appointment Begin Date must be entered). However, in addition to the error message the form canvas/layout changes, many of the fields were missing. When you entered the Begin Date, the form would revert back to the original canvas.
PEALEAV	1-5B8LO	<p>In PEALEAV 7.0 the edit format mask for ALL hourly fields was: 9G999D99, which allowed for 8 places. The maximum field length was 8. So, a number such as -2079.99 would display as -2,079.99 - which needed 9 places to display and caused the field to display ##### instead of the value.</p> <p>In Banner 6, there was no edit format mask on these fields, and would accommodate the 7 digit negative number without a comma, namely, -2079.99.</p>
PEILHIS	1-5B8NJ	<p>In PEILHIS 7.0 the edit format mask for ALL hourly fields is: 9G999D99, which allows for 8 places.</p> <p>The maximum field length is 8. The number -2079.99 (negative nbr) displays as -2,079.99 which needs 9 places to display and causes the field to display ##### instead of the value.</p> <p>In Banner 6, there was NOT an edit format mask on these fields and would accommodate our 7 digit negative number without a comma, i.e. -2079.99.</p>

Object	Number	Description
PTQECLS	1-12A0L0	The label for Id should be ID
PDIDLST	1-12S10R	When you enter PDIDLST from direct access and skip over the ID field, enter a name, receive the name and select Next Block, it works as per functionality. However, when you rollback, clear the ID, and attempt to navigate to the Name field to re-query a new name, it does not allow you to do this. You have to exit the form back to the menu and re-enter the form again.
pokb_employee_r1.sql	1-15CVVI	The Employee Form (PEAEMPL) prevents retrieval of an employee record if any of the three SPBPERs fields are empty: Birthdate , Gender , or Ethnicity . The Employee API needs to be consistent, preventing any update of employee information if any of the three required fields mentioned above are missing.

Electronic Approvals

Object	Number	Description
NOAEPAF	1-11JIB1	When you try to use the Alternate ID search in the Electronic Personnel Action Form (NOAEPAF), the ID field displays <i>GENERATED</i> instead of displaying the Alternate ID Search window.
NOAEPAF	CMS-DFCT104414	If a user is defined in the NOAEPAF routing queue twice, Approver and Apply, they are unable to approve the transaction on the NOAEPAF form directly. When querying the data on NOAEPAF the Queue Status displayed shows <i>In the Queue</i> but when you look at the routing queue, the user should be <i>Pending</i> . The form is looking at the highest level in the queue rather than the lowest incomplete level.

Object	Number	Description
NOAEPAF nokepa1.sql nokepc1.sql nokepcr.sql	CMS-DFCT61393	<p>Canceled transactions have a queue status of pending. This results in the user being notified that they have transactions to take action on when in reality, they may not. This problem occurs when you cancel a transaction with a status of partially complete. That is, some portion of the transaction was already applied to the database. Outside of a transaction status of applied, this is the only status that will let you cancel a transaction.</p> <p>The problem is that the user in the routing queue where the transaction is pending, is not having their queue status changed from pending when the transaction is canceled. The alert only looks to see if the user has one or more transactions in a pending status.</p>
NOAEPAF nokepc1.sql	1-HV4Q2	<p>This problem applies to NOAEPAF also. The original coding was such that a shift code is valid, as long as that shift exists on an existing job, for anyone. It was actually validating against <code>nbrjobs_shift</code>.</p>
noepaf.fmb, nokepc1.sql	1-LTUMD	<p>Entering a job title longer than 30 characters would cause an Oracle 6502 error on the Electronic Personnel Action Form (NOAEPAF) when submitting the transaction.</p>
NOAEPAF NOAAPSM nokepaf.sql nokepa1.sql	1-LUVQW	<p>The proxy user ID was not getting entered into NORROUT when the proxy took action on either NOAAPSM or NOAEPAF.</p> <p>In 6.x, when a proxy took action, the <code>NORROUT_ACTION_USER_ID</code> would be updated with the proxy's user ID. In 7.x, when a proxy took action, <code>NORROUT_ACTION_USER_ID</code> was filled with the approver for whom they were proxying user ID or in other words the <code>NORROUT_RECIPIENT_USER_ID</code>.</p> <p>If a superuser did override a transaction, the superuser ID was being posted to NORROUT as it should.</p>

Object	Number	Description
NOAEPAF	CMS-DFCT90194	<p>The originator could not void a transaction that had been returned for correction using the Electronic Personnel Action Form (NOAEPAF). They would receive the message <i>Invalid Action</i> when they selected the Approval Action <i>Void</i> from the pull-down list of Approver Actions.</p> <p>If Void was selected on NOAAPSM, the transaction could be made void.</p>
NOAEPAF	1-1B7E1H	<p>When an approver left the university or the position in which they were an EPAF approver, you could not view the completed transaction.</p> <p>When you tried to query a completed transaction, an error message: <i>Invalid User ID for this Level Code</i>. would display and you would not be able to view any transaction details.</p>
noksecr.sql, noksec1.sql	1-L964M	<p>Performance problems with noksecr/poksecr in the following queries during time entry:</p> <pre>SELECT * FROM PTRINST WHERE PTRINST_CODE = 'PAYROLL'</pre> <pre>SELECT 'Y' FROM PSRORGN WHERE PSRORGN_ORGN_HIGH >= :B3 AND PSRORGN_ORGN_LOW <= :B3 AND NVL(PSRORGN_COAS_CODE, '*') = NVL(:B2, '*') AND PSRORGN_USER_CODE = :B1</pre>
noksec1.sql	1-1MGRK7	<p>NOKSECR.p_check_security has a typo on error text. Code states:</p> <pre>WHEN empr_exception THEN return_code_out := const_error; return_text_out := 'You do no have permission to' ' access this Employer.';</pre> <p>This displays error message</p> <ul style="list-style-type: none"> - You do no have permission to access this Employer. <p>This should display</p> <ul style="list-style-type: none"> - You do not have permission to access this Employer. <p>The letter t was missing from the word, not.</p>

Object	Number	Description
NOAAPSM	1-I60T6	In the main body of the form, after doing an enter query function, you could not tab from the Name field into the Category field and then consequently into the other fields for query purposes.
NOAEPAF nokepc1.sql	1-1R9SRQ	On the Electronic Personnel Action Form (NOAEPAF), the current value would not default in for the Supervisor ID .
NOAEPAF	1-TLHYS	<p>The form NOAEPAF contained hard-coded Seed numbers in the form level trigger G\$_VERIFY_ACCESS.</p> <p>NOAEPAF, delivered with Position Control 7.3 did not reference the GOQOLIB Security seed numbers correctly.</p> <p>So, on changing the security seed numbers in GOQOLIB.FMB, they did not change in NOAEPAF. As a result, the generated NOAEPAF.FMX would not work with a database that has non-baseline seed numbers.</p> <p>The runtime error on NOAEPAF form was:</p> <p><i>*Error* Invalid password tried.</i></p>
nokedit1.sql	1-3G0XJZ	<p>The ability to terminate an address and then add a new address of the same type within one EPAF is required. The following error is displayed when submitting an EPAF:</p> <p><i>*ERROR* Address of this type exists.</i></p>
nokedit0.sql nokedit1.sql	1-G6QQV	This package contained invalid field name of pebempl_trem_date. It should be pebempl_term_date.
nokedit0.sql nokedit1.sql noklis1.sql	1-378DOX 1-O3RC1	This defect was created for a Position Control object and this was for the same issue, 1-33FI1L for 1-O3RC1 8.0 defect problems in applying self-service EPAF bio-demo information.

Object	Number	Description
nokedit0.sql nokedit1.sql	1-1AXRCN	<p>NOPEAMA was not defaulting the Supervisor Position, Suffix and Title. Both NBAJOBS and NOAEPAF (when applying an EPAF online) defaulted these values when a supervisor ID was entered.</p> <p>This resulted in errors regarding the Supervisor, Position, and Suffix when entering NBAJOBS.</p>
nokepcr.sql nokepc1.sql	1-2KMRNU	<p>When entering a special rate greater than \$999.99 and formatted 5,000.00, an error displayed:</p> <p><i>Invalid Special Rate. Format is 999,999.999999.</i></p> <p>If you then entered 5,000.00 (based on the error message) and saved, the <i>Page Not Found</i> error would display.</p>

Employment Administration

Object	Number	Description
NBAJOBS	1-SDT9V	<ol style="list-style-type: none">1. After making changes to NBAJOBS data, if a user selected rollback on the form and there were changes to be saved, they were prompted to save the changes. If an error was generated, you would acknowledge the error and it would return to the Key block of the form without a chance to correct the problem. None of the data was saved. In prior versions if the save on rollback generated error messages you had the option to lose the changes and the form would continue the rollback or you could cancel the rollback and fix the error message.2. If an error message was generated on the Payroll Defaults tab page, after acknowledging the error the cursor would return to the Job Detail tab rather than remaining in the Payroll Defaults tab.

Object	Number	Description
NBAJOBS	CMS-DFCT102485	<p>The following date errors were received:</p> <ol style="list-style-type: none"> On adding a new job detail record and entering a date in MMDDYYYY format, and clicking OK, the following message would display: <p><i>FRM-50026 Date must be entered in a format like DD-MON-RRRR.</i></p> <p>This must not occur. The form must translate the date format entered.</p> On adding a new L/D or Earnings effective date in MMDDYYYY format, the following message would display: <p><i>FRM092101 There was a failure in the Forms Server during start up. This could happen due to invalid configuration. Please look in the web-server log file for details.</i></p> <p>This must not occur. The form must translate the date format entered.</p>
NBAJOBS	1-JQLW1	<p>On adding a work schedule in the Employee Jobs Form (NBAJOBS), a pull-down list arrow displayed next to the Copy From field in the Create New Date Record window. When you clicked it, no list of values would display.</p>
NBAJOBS	1-15Q5ZZ	<p>If you tried to delete a job detail record that was effective on the Last Paid Date, NBAJOBS appeared to delete the record even though it didn't.</p>

Object	Number	Description
NBAJOBS	1-4JTDT	<p>The IPEDs Reporting Indicator would not display in the following scenarios:</p> <ol style="list-style-type: none"> 1. When you entered a new position/suffix on NBAJOBS, completed the Job Setup window and acknowledged all messages; the cursor would go to the Begin Date field and the IPEDS Reporting Indicator field would not display. However, if you tabbed to the field, it would appear. 2. On an existing NBAJOBS record, if you used key strokes or the Next Block icon to access the Job Detail page, then went back to the General block (still using keystrokes), the IPEDS Reporting Indicator would not display.
NBAJOBS	CMS-DFCT105421	The form allowed you to remove a work schedule end date, that fell prior to the last paid date.
NBAJOBS	1-18IMOF	The Quick Setup window would display when querying existing jobs information.
NBAJOBS	1-1SD011	<p>Changing contract date values alone does not cause the <code>nbrbjob_encumbrance_change_ind</code> flag to be set to Y. This in turn would cause NBPBUDM to bypass recalculating the encumbrance dollars.</p> <p>This only affected clients NOT using encumbrance recasting functionality.</p>
NBAJOBS	1-12AH41	Users with query only access to NBAJOBS could create new job records and create new effective dated records. If you had query only access to the form the New Job window and the new effective date option must not be available.

Object	Number	Description
nbkjlb1.sql	1-1R9ZL3	<p>With the 7.3 Position Control upgrade, there was a new column added, <code>_DATA_ORIGIN</code>, in both the <code>NBRJOBS</code> and <code>PERJHIS</code> tables. In some cases, the <code>NBRJOBS_DATA_ORIGIN</code> and the <code>PERJHIS_DATA_ORIGIN</code> columns had a strange value.</p> <p>When job labor records were modified/ deleted, at the end of the transaction, the Job's BPI (<code>np_job_assignment</code>) was called to set the Encumbrance indicator to Y. The call to the Job's BPI should have included the <code>p_data_origin</code> parameter with the value of <i>Banner</i>. Since this parameter was missing in the call, the Job's BPI was using the unspecified string value to update the <code>PERJHIS_DATA_ORIGIN</code> column, while creating the history records.</p>
nbkjob1.sql	1-PUHBT	<p>When creating new job records Canadian installations were receiving the following message: <i>Warning: This Job Assignment is not IPEDS Reportable, but the IPEDS Report Indicator is set to Yes</i></p> <p>This is an invalid message as IPEDS is not applicable to Canada. The new job creation process was setting this indicator to No, but would return the erroneous warning message.</p> <p>This indicator did not impact any job processing.</p>
nbkjob1.sql	1-PUHSZ	<p>NBAJOBS generated the following message even if the FTE was not greater than the budgeted FTE:</p> <p><i>Total FTE for Job Detail on this position greater than budgeted FTE.</i></p>

Object	Number	Description
nbkb_job_earnings_r1.sql	1-11TS0M	<p>Default earnings could be added with an effective date prior to the Last Paid Date.</p> <p>For example, you could enter a future change with an effective date of 4/15/2006, even though the Last Paid Date value was 4/30/2006. Once the future change was added, the following error would display on the auto hint line stating:</p> <p><i>FRM 41032: Cannot set ENABLED attribute of current item NBREARN.NBREARN_EARN_CODE.</i></p> <p>After the future change was saved, it could not be updated or deleted.</p>
nbkjob1.sql nbkp_job_assignment1.sql	1-197N0D	<p>Processing Leave by Job: When checking the Accrue Leave box on NBAJOBS, you could receive the following message:</p> <p><i>*ERROR* Unable to insert leave record (Oracle Error -1400).</i></p>
nbkb_job_base1.sql nbkb_job_detail1.sql	1-199XMR	<p>User ID was not saved to the base job and job detail records when updating a job assignment.</p>
nbkb_job_base1.sql, nbkb_job_detail1.sql nbkp_job_assignment1.sql	1-19E776	<p>User ID was not saved to the job base and job detail records when updating a job assignment.</p>
nbkb_job_detail_r1.sql	1-1FSI43	<p>The process would insert zeros into the Encumbrance Hours field disregarding the encumbrance method. This caused errors on NBAJOBS when the Encumbrance Method was something other than Hours Input.</p>

Object	Number	Description
nbkb_job_base_r1.sql nbkp_job_assignment1.sql	1-T7VLP	If the NTRINST record allowed the insertion of Job Detail records between existing records, the NBAJOBS Base Job End Date was being removed. This occurred if a future Job Detail record existed with a Terminated status and a new Job Detail record was inserted between the Last Paid Date and the future Terminated record.
nbkb_job_base0.sql nbkb_job_base1.sql nbkb_job_base_r0.sql nbkb_job_base_r1.sql nbkp_job_assignment1.sql	1-Q8KM4	The NBAJOBS form would not allow you to change a primary job to secondary. This type of functionality was required if an employee currently had two different job records and the one that was currently considered primary was terminating. The site would need to change the current primary to secondary and the current secondary job record would then become the primary job record. This was especially critical in benefit (life insurance) and leave processing.
nbkb_job_base_r1.sql nbkb_job_base_s0.sql nbkb_job_base_s1.sql	1-LY3K4	No warning message would display regarding the existence of a position end date when making changes to jobs. Per the Position Control 7.3 Release Guide, a warning message must be issued indicating that the position had ended.
NBAPBUD	1-HZ6WF	The same salary budget record was not displayed when you navigated into the other windows and then back into the Salary Budget window. The same scenario could happen if you had multiple budget ID/Phase combinations for working budgets.

Object	Number	Description
NBAPBUD	CMS-DFCT104382	<p>While performing an Organization Transfer, NBAPBUD allowed a value in the Date Created field that was outside of the fiscal year.</p> <p>In addition, the situation existed where, if you approved working budgets prior to the beginning of the upcoming fiscal year (say on 6/29) and then did an organization transfer on 6/30, the 6/30 date will default into the Date Created field (always defaults sysdate). This caused confusion because the NBRPTOT record that existed with a 7/1 date created value had a transferred status. The active status record had a 6/30 date created value. On manually entering a budget record for a position, you could not enter a date that was outside of the fiscal year of the record being added.</p>
NBAPBUD	CMS-DFCT93380	<p>In release 5.4 Defect # 79456 was corrected.</p> <p>This defect restored the ability to enter negative budget amounts in NBAPBUD. It had been erroneously removed when correcting defect # 74470 (which allowed NULL budget values). The FTE field was missed in this correction.</p> <p>Negative FTEs are important in keeping budgeted FTE in sync with the budgeted dollars.</p>
NBAPOSN	1-522KY	<p>When the Occupational Title Code description was greater than 56 characters, error FRM-40831 truncation would occur and the following message would display:</p> <p><i>value too long for field DOTT_DESC.</i></p> <p>After you acknowledged the error, the following message would display:</p> <p>FRM-40375: EDIT_DOTT trigger raised unhandled exception ORA-06502.</p>

Object	Number	Description
NBAPOSN	CMS-DFCT80064	<p>Problem with NBAPOSN related to maximum number of open forms on GUAINST defect 80064. Banner error comes from GUAGMNU: <i>Organization's maximum number(2)of current open forms has been reached.</i></p> <p>You had to log out and log back in to continue calling forms.</p>
NBAPOSN	1-12AMDO	Between the 7.0 and 7.2 Position Control releases, NBAPOSN allowed you to create positions that were less than 6-characters in length. After these positions were created, no updates of any type could be made.
NBAPOSN	1-YR7WS	If you entered an invalid Salary Group/ Table/Grade combination, the form would lock you in the Grade field. It would not allow you to change the values to a valid combination. The only way you could exit the form was by using CTRL+ ALT+ DEL.
NBIPINC	1-1XH8V1	NBIPINC would generate ORA-01445 errors in a trace file.
NHIDIST	1-2VRBJU	NHIDIST would not return correct information if the name had an apostrophe.
NHIEDST	1-2ACV8K	<p>When using the Extract Data with Key option, the individual transaction amounts displayed in the form and in the extract, were displayed doubled or triple their original amounts.</p> <p>For example, an original transaction amount of \$500.00, would display as \$1000.00.</p>
NHIEDST	1-9MG0F	If the Employee Distribution Inquiry Form (NHIEDST) was the first form accessed after logging into Banner, you could not click or tab to the Name field.

Object	Number	Description
nbpk_job_earnings1.sql	1-1LWLWN	The NBAJOBS API allowed default earnings end on records that did not contain the most current effective date.
nbkjobs.sql nbkjob1.sql nbkb_job_detail_r1.sql	1-PX0J6	Future changes could not be added for employees with invalid supervisor information. When the most current detail record had an effective date prior to the Last Paid Date, you could not enter a future change.
nbkb_job_detail_r1.sql	1-NCAQR	When changing an employee's annual salary on NBAJOBS the Assign Salary was correctly recalculated. However, the Per Pay Salary was not recalculated. This resulted in the employee being paid incorrectly. The form would not allow you to alter the Per Pay Salary field.
nbkjld1.sql	1-1IY4QF	NBAJOBS would not allow you to enter a future change in the labor distribution to change a no longer active FOAPAL component. This included components that had been made inactive or terminated. This occurred when the information you were trying to update had previously been fed to finance.
PEA1PAY PEAHIRE	1-2TIY4X	The PEA1PAY and PEAHIRE forms require changes in support of the SSN search enhancement included in Banner General 7.5. When the SSN search functionality is in effect for the institution, if the user enters a value in the ID field that is not an existing ID, but is an existing SSN, the person's ID associated with that SSN should be returned to the ID field. General Libraries were changed in support of this enhancement. Most Banner forms inherit the functionality from the libraries without change to the forms. These 2 Payroll forms require a change to make the SSN search work consistently with other Banner forms.

Object	Number	Description
PEAEMPL	CMS-DFCT105622	<p>The form was not allowing the delete of PEAEMPL if a GXADIRD record existed, regardless of whether the Payroll box was checked.</p> <p>You should be able to delete from PEAEMPL if GXADIRD exists with only the Accounts Payable box checked.</p>
PEAJCDD	1-1J2FS9	<p>For every status message that contained the word benefits, the word benefits was misspelled.</p>
pefcvlv.sql pekleav.sql	1-A8ZLX	<p>When processing employee leave records on PHAHOURL, using Leave by Job, the leave amount deducted in the conversion from days to hours was erroneously using FTE.</p> <p>Based upon the original formula from the specification, the FTE should not be used in the calculation when an employee posts one day of leave usage. It should exclusively use the Hours per Day on the job assignment.</p>

Object	Number	Description
pokb_employee_r1.sql	1-OKJ3F	<p>Various issues were reported in the usage of PEAESCH, under differing conditions:</p> <ol style="list-style-type: none"> 1. When trying to terminate an employee who was currently on leave and had been run through a current payroll, the form would generate the following message: <p style="margin-left: 40px;"><i>*ERROR* Employee must first be reactivated before further changes can be made.</i></p> 2. The form was always populating the Effective Date with the Personnel Date entered in the Key block of the form. This may not always be the correct value to use. 3. The form allowed you to select a status other than Active when the Action was <i>Return from Leave</i> and All Records was selected.
pokb_employee_r1.sql	1-OLQDW	<p>PHPUPDT would not complete successfully when it was updating an employee status to Terminated and the I-9 Form Ind value was N and an I-9 date existed. It would abort with the following message:</p> <p style="margin-left: 40px;"><i>API error on pidm xxxxxx Message 0 = Employee must first be reactivated before further changes can be made.</i></p> <p>The problem was with the editing done on the I-9 date when the I-9 Form Ind value was <i>Exempt</i>. The API would set the I-9 date to null and then compared it to the database value. If the values were unequal, the process stopped and issued the above message.</p>

Object	Number	Description
PEALEAV PEKLEA1.sql	1-ISYJO	<p>PHPLEAV could abort if the FTE value on NBAJOBS was greater than 1 and Leave by Job was being used. PHPLEAV displayed the following error when the condition existed:</p> <p>Parameter Sequence Number: ORA-01438: value larger than specified precision allows for this column WRN-ORACERR: Error occurred in file "phpleav.pc" at line 2487</p> <p>WRN-ERRSTMT: Following statement was last statement parsed: insert into phrjacr (phrjacr_year,phrjacr_pict_code, phrjacr_payno,phrj phpleav terminated with error</p>
PEIEPRO	1-2AX5K1	<p>PEIEPRO would display the following error when you entered information in the From and To Timesheet Organization fields and pressed next block:</p> <p><i>FRM-40202 Field must be entered.</i></p> <p>The error message related to the COA field.</p> <p>The COA is not required when Banner Finance is not installed.</p>

Object	Number	Description
PEISALH	CMS-DFCT104386	The form would not display information for the Employee ID in the Key block.
PEKLEA1.sql	CMS-DFCT105623	<p>The following error would be encountered when running PHPUPDT if the number of hours to be rolled into the beginning balance exceeded the field length of 9999.99.</p> <pre> Parameter Sequence Number: ORA-06502: PL/SQL: numeric or value error: number precision too large ORA-06512: at "BANINST1.PEKLEAV", line 1547 ORA-06512: at line 1 WRN-ORACERR: Error occurred in file "phpupdt.pc" at line 4562 WRN-ERRSTMT: Following statement was last statement parsed: begin pekleav . p_main_roll (:par_year , : par_pict_code , :par_payno phpupdt terminated with error 19 lines written to /jobsub/ public/BANDNL/phpupdt_1683060.lis </pre>

Health and Safety Administration

Object	Number	Description
PEAHSIN	1-16LKGG	<p>With the 7.2 release, the Status Date stopped defaulting in. If a value was not entered, the following error would display:</p> <p><i>FRM-40508: ORACLE error: unable to INSERT record.</i></p>

Biographic/Demographic Administration

Object	Number	Description
PPAIDEN	1-15EWYG	The COBRA message was erroneously removed from the 7.2 version of PPAIDEN: <i>*NOTICE* Please check dependants/spouse for COBRA eligibility.</i>
PTRLCAT	1-15KGOS	In the General Leave Category Block, the Print Sequence Number allowed 1 digit rather than 2, as it was defined on the table.

Tax Administration

Object	Number	Description
pxkb_w2_state_r1.sql pxkb_w2_state_s1.sql	1-1J2FIS	PXRW206 would generate the error <i>Missing State Taxable Wages</i> , when an employee had state unemployment deducted, but no state income tax deducted.
pxkp_w2_20061.sql	1-1IB1YB	Process was not including any amounts for a person in the Totals report, if one or more box amounts was found to be negative. This happened when PXRW206 was run with a W2 Format parameter value of 3 (Totals only) and the Zero Out Negative Amounts parameter value of <i>N</i> . The process, when run with this parameter combination, must report the totals as they exist, regardless of whether they are positive or negative.
PHPTAXS	1-3D1HJ3	As of January 1, 2008, District of Columbia employee tax calculations have to be rounded to a whole dollar. Currently the process does not do so.

Object	Number	Description
PHPTAXS	1-G6R5S	In 2005, Virginia state removed the option to round tax withheld to the nearest dollar.
PHPTAXS	1-SDZGU	Mississippi state tax needs to be rounded.
Tax Data	1-PHL46	Alabama state tax calculation includes an exemption for federal taxes paid. Currently the delivered tax setup for Alabama does not consider that federal taxes may be paid using federal NRA tax codes. Employees who were paid as an NRA and had federal taxes withheld were not having the correct amount of state taxes withheld.
PXAROECC	CMS-DFCT91115	Navigation problems within the Key block: After the second time if the user used search function in the ID , the cursor would not access the Employer Code anymore. Besides that, the LIST of value function associated with the Payroll ID took quite a bit of time to return data back.
PXAW2CC	1-1I6WRI	This defect was created to allow the electronic distribution posting of RPE 1-1I6WP9.
PXAW2CC	1-1QDXRK	On accessing PXAW2CC to print a reissued W2, the Display W2/W2c option was not available.

Object	Number	Description
PXAW2CC PXPW2MP PXPW2MM PXR1042 PXRW2US payroll dbprocs pxkb_w2_coded_info_r1.sql pxkb_w2_local_r1.sql	1-1IJF9T	<p>This patch is required, if you install Banner Human Resources 7.2.2 and later install Banner Human Resources 7.2.</p> <p>The 7.2 install will overwrite the objects delivered in 7.2.2 release. This is because Banner Human Resources 7.2 is a cumulative release and includes the 7.1.3 and 7.1.5 2005 regulatory release.</p> <p>To correct this situation, an electronic distribution patch containing the objects delivered in Banner Human Resources 7.2.2 has been provided. You will need to apply this patch immediately after the Human Resources 7.2 upgrade is complete.</p>
pxkp_w2_20061.sql	1-1KMI1Y	<p>The process should only retrieve name information (including Suffix) from PPAIDEN when the SSN Last Name was blank on PEAEMPL. Currently the Suffix from PPAIDEN was being retrieved when SSN name information existed on PEAEMPL and the Suffix was blank.</p>
pxkp_w2_20061.sql	1-1LQS0U	<p>The Statutory Employee check box on the W-2 was not being checked even though deduction or earnings information was entered for this box on PXAREPT.</p>
pxk07t1.sql	1-3A5TW3	<p>If the employee address city-state-zip code string was greater than 30 characters, the W2 would not display on Employee Self-Service nor could it be viewed from PXAW2CC.</p>

Time Entry and Payroll

Object	Number	Description
PHAADJT	1-OUB92	<p>When doing a Redistribution, the following error message would display when using the Job Information tab to navigate into the History Jobs window:</p> <p><i>ERROR: Changes not allowed for ORIGINAL, REDISTRIBUTED, REISSUED, and VOIDED events.</i></p>
PHAADJT	CMS-DFCT102489	<p>Disposition of an adjustment was not always changed when changing the Calculation and/or Print Method. Changing the Calculation Method of an adjustment record must result in a change in the disposition. If the Calculation Method is Manual then the disposition of the pay event must be either 37 or 47.</p> <p>Changing the Calculation Method to Computer must change the disposition to 27.</p> <p>Changing the Print Method of an adjustment record must result in a change in the disposition if the adjustment is manually calculated. When an adjustment is manually calculated and manually printed the disposition must be 47. Changing the Print Method to Computer must result in disposition 37.</p> <p>This occurs in the 6.x and 7.x versions.</p>
PHAADJT	CMS-DFCT99562	<p>When reissuing a document with more than six document items, the following message would display:</p> <p><i>Document total amount must be equal net pay amount.</i></p> <p>You had to scroll to the end of the list to save the change without receiving the message.</p>

Object	Number	Description
PHAHOUR	1-18IN56	<p>Re-extract option could be disabled in the History Jobs block under the following situation:</p> <ol style="list-style-type: none"> 1. Query information for a specific ID on PHAHOUR. 2. From the Job History block, click Rollback. 3. In the Key Block, go into the Detail Criteria window and enter an organization code. 4. Go to Next Block. 5. The cursor will now be in the Job History block again. 6. Click options and the Re-extract option will be disabled. <p>This also occurred if you queried information for an organization first and then for a specific ID.</p>
PHAHOUR	CMS-DFCT77208	<p>Under specific scenarios you could be locked in PHAHOUR with an out of balance labor distribution condition.</p> <p>An employee's labor distribution for his primary position is divided into 3 different percentages: 34%, 33% and 33%</p> <p>Using key strokes to get to position record on PHAHOUR, from regular, arrowed down from regular enter optional earn codes, commit with key stroke that rolls back to the SSN. The form indicates the transaction is complete. At this point the cursor goes to the Organization field and hangs with the following error displayed:</p> <p><i>Error... Cannot override for this earn code.</i></p>
PHAHOUR	CMS-DFCT88615	<p>When entering multiple earn codes that reduce regular earnings, you must either save after each exception time entry or use the down arrow key to enter each earning. If you used the mouse to get to the new record, it would not reduce regular earnings for the first exception earning entered.</p>

Object	Number	Description
PHAHOUR	DFCT89242	<p>PHAHOUR would not function correctly if you inadvertently entered a duplicate earning that reduced base pay.</p> <p>Example: On PHAHOUR for an employee at disposition 20 with default Regular earnings, enter an additional earnings code that reduces base hours.</p> <p>REG hours is 80</p> <p>Enter VAC 8 hours.</p> <p>When you save the record you will have:</p> <p>Reg hours 72</p> <p>Vac hours 8</p> <p>Save the record.</p> <p>Arrow down and enter VAC again with 16 hours.</p> <p>Notice that the Regular hours is now reduced to 56.</p> <p>Save the record.</p> <p>The following message is displayed:</p> <p><i>*ERROR* Duplicate earn code/shift/gen not allowed.</i></p>
PHAHOUR	1-B7NSD	<p>Currently the employee's ID is stored in the PHRJOB record when PHPTIME is run for a payroll.</p> <p>If you changed an employee's ID and removed the alternate ID, you could no longer view history through PHAHOUR because the ID on the phrjobs record no longer matched any of the employee's IDs.</p>

Object	Number	Description
PHAHOUR	1-G6QRN	<p>In the History Jobs block, if you type over the top of the existing ID to process a different employee and pressed tab or enter, you get the information for the new ID number (as always) but, if the new ID had no history earnings, you also got an alert box:</p> <p><i>FRM-40350: Query caused no records to be retrieved.</i></p> <p>You had to click OK or press Enter to continue processing. This is a change from Banner 6.x and adds an additional mouse click or key stroke.</p> <p>The alert box is not displayed if you use the enter or the query key or if you returned to the selection criteria box to process a different employee.</p>
PHAHOUR	CMS-DFCT104261	<p>Issue for clients that do not license Banner Finance.</p> <p>The top half of the Finance field tags displayed above the field tags for the External Account code.</p>
PHAHOUR	CMS-DFCT104412	<p>PHAHOUR had problematic data validation that slowed you down from efficiently entering time.</p> <p>If the Fund code was not entered before going to the Org code, you could not move out of the Org code to return to the Fund.</p> <p>This can be troublesome when the Org code was supposed to default from the Fund and you only had information for the Fund.</p> <p>Prior to 7.0 you could go back into the Fund and enter a value. The rest of the FOAPAL would default as expected.</p>
PHAHOUR	CMS-DFCT105674	<p>PHAHOUR was not resetting dispositions correctly when changes were made to the hours breakdown area of the form.</p> <p>If the employee had been processed through PHPCALC and you made a change to the hours breakdown area of the form, the disposition was reset to 30 - Awaiting PHPCALC.</p> <p>It should be set to 20 - Awaiting PHPPROF.</p>

Object	Number	Description
PHAHOUR	CMS-DFCT83458	<p>In the History Jobs block of PHAHOUR, you could not search for people who had an apostrophe in their name.</p> <p>The form would remain blank, except for the key block, and the following message would be displayed in the AutoHint line:</p> <p><i>Query caused no records to be retrieved.</i></p>
PHAHOUR	CMS-DFCT90800	<p>The name entered within the Detail Criteria window, the name entered was not the same as displayed in the Jobs History block.</p> <p>For example:</p> <ol style="list-style-type: none"> 1. On PPAIDEN change Charlene Adams to Charlene Sood and save. 2. Access PHAHOUR. 3. Enter a Year, Pay ID and Pay Number that Charlene Sood and another person were both paid in. <p>Cynthia Black was used because the name Black falls ALPHABETICALLY in between Adams and Sood.</p> <p>When the query for Cynthia Black was entered (entered Black in the Last Name field) in the Time Entry Selection Criteria window, Charlene Sood was displayed.</p> <p>The form should display Cynthia Black's time sheet.</p>
PHARECN	CMS-DFCT105541	<p>The Check Reconciliation Form would allow you to save a bank record (bottom half of the form) without a value for Process Date. This caused the record to be unretrievable.</p>

Object	Number	Description
PHAREDS, poklib1.sql	1-BB2US	<p>PHAREDS required you to enter a Posting Override Date, and then validate that the date entered was within a defined accounting period.</p> <p>When Finance is not installed this validation will fail and generate the error message:</p> <p><i>Accounting Period Closed. Re-enter a New Posting Date.</i></p> <p>You were unable to enter any date that would pass the validation and could not leave the date blank. On clicking Posting Date in the Search and Replace window, the following message is displayed:</p> <p><i>*ERROR* Date button is outside the current block.</i></p>
PHATIME	CMS-DFCT97195	<p>The Total Hours/Units field in the Labor Distribution window of the Electronic Approvals of Time Entry Form (PHATIME) retained the value of the previously entered labor distribution you clicked back to the Time Entry window rather than doing a previous block or selecting Time Entry detail from the Options menu. On returning to the Labor Distribution window to change other labor distributions this value would be included in the entered labor distribution values you would be unable to save the newly entered distributions. You had to rollback and re-query the records to clear the calculated field.</p>
PHPCALC	1-BAYQD	<p>Process could abort with the error:</p> <p><i>(PHPCALC) SQL ORACLE ABORT IN PARAGRAPH 39710 SQLERRMC: ORA-01438: value larger than specified precision allows for this column.</i></p> <p>This could occur if using FLSA functionality. The process was not accommodating the situation where the Amount on the PHR HOUR record might be blank, which is normal for sequences that have been manually calculated on PHAADJT.</p>

Object	Number	Description
PHPFEXP	1-N7H62	<p>PHPFEXP would not accommodate a three-decimal place fringe chargeback rate. The result was a truncation to a one-decimal place rate.</p> <p>For example, a fringe rate of 10.234 would be truncated to 10.2 in the fringe chargeback calculation.</p>
PHPFEXP	1-PKPC2	<p>The coding correction to PHPFEXP, for defect CMS-DFCT62480, will not compile on open VMS or Linux.</p> <p>The line of code causing compile errors reads as follows:</p> <pre>72-01 IF PHRELB-REDISTRIBUTION-AMT(LSUB) <> -99999999.99 THEN</pre> <p>It should read:</p> <pre>72-01 IF PHRELB-REDISTRIBUTION-AMT(LSUB) NOT = -99999999.99</pre>
PHPFEXP	1-ZJTBU	<p>PHPFEXP was using rounding within one of the compute statements. This needed to be broken down to two statements to calculate transaction amounts correctly when using two-decimal place percentages (i.e. 21.35 %).</p> <p>This is specific to Fujitsu compilers at this time.</p>
PHPFEXP	CMS-DFCT62480	<p>Differences were found in the amounts/percents between PHAREDS information and PHPFEXP. This was happening when specific amounts were entered on PHAREDS. This caused reconciliation problems.</p>

Object	Number	Description
PHPMTIM	1-1TQ4XA	<p>If a person/time sheet record generated the error:</p> <p><i>Exception hours are greater than base hours, this will result in negative base hours.</i></p> <p>The process would not clean up completely.</p> <p>For example, if an employee had 44.2 hours REG defaulted per pay. Employee entered 56 hours ANL on their time sheet. This was submitted and approved.</p> <p>When PHPMTIM is run, it tries to insert the records into PHREARN, PHRHOURL, PHRELBD, and PHRATND. If the process generates the error message, the records are removed from PHREARN, PHRHOURL and PHRATND. But the records remain in PHRELBD. This causes problems later if you tried to do a redistribution of the pay event. The following message is displayed:</p> <p><i>ERROR-Problems in POPULATE_PHRREDS_ROUND.'</i></p> <p>The records must then be removed via SQL.</p>
PHPMTIM	1-12Z7TZ	<p>Employee had an inaccurate split labor distribution on NBAJOBS (80%, 10%, 10%) when time was broken down into multiple labor distributions with same begin/end date.</p> <p>The employee did not have default earnings. The employee's time was entered through a third-party timekeeping system that included labor distribution information-defaults and overrides. Time Off earnings (sick, vacation etc.) were set on PTRECLS to reduce hours.</p>
PHPTIME	CMS-DFCT2548-7.0.1.1	<p>Using work schedules with salaried employees. If the employee starts mid-pay, their pay was prorated two times.</p> <p>For example, if standard hours was 80 and the assignment started half way through the pay period, 40 hours would default to the timesheet. The pay was calculated on 40 hours and the result was multiplied by 50% because the employee was salaried.</p>

Object	Number	Description
PHPTIME	CMS-DFCT80918	<p>Work Schedules and Default Earnings created time records for an employee when the employee did not have default hours or work schedule defined.</p> <p>So, if an employee moved from default earnings to a work schedule and had a break (1 or more days) between the time the default earnings ended and the work schedule began, PHPTIME would create default hours based on the hours per day on the Jobs record.</p>
PHPTIME	1-2TICMM	<p>The program was not calculating the total days in the pay period (<code>per_length</code>) correctly for salaried employees who started a job in the middle of the pay period.</p> <p><i>This defect needs to be fixed along with CMS-DFCT80918.</i></p> <p>When a person's job ends during the pay period, the program uses the work schedule for the entire pay period to calculate the number of days. This is correct.</p> <p>When the person's job starts during the pay period, the program used the work schedule during the person's job days, but used the standard calendar for the part the employee didn't work which created a higher percent of time worked and consequently caused the employee to be overpaid.</p>

Object	Number	Description
PHPTIME	1-9QGD5	<p>When running the Time Processing Report (PHPTIME), employees who had a split time sheet during a pay period in which there were multiple holidays could have a negative hours situation. This would only occur in a situation where the employees hours per pay divided by the number of work days was less than the hours per day defined on the Employee Jobs Form (NBAJOBS).</p> <p>The negative regular hours in a time sheet would cause very odd calculations in PHPCALC resulting in the employee's pay check being incorrect.</p>
POQMENU	1-KSGKX	<p>FRM-92101 error would occur. You exit from Banner when you access NOAAPSM by clicking PAF's on the first approver box and <i>Yes</i> on the second pop up box, and then click on any button (list of values icon or a calendar icon) in the Key-Block.</p> <p>This happened when you first log in to Banner and called a Payroll Form.</p>

Reports and Processes

Object	Number	Description
NBPBROL	CMS-DFCT91578	Sites that did not license Banner Finance could not delete working budgets in NBPBROL with a value of Delete Working Budget (D) for the parameter Report Choice .
NBPBROL NBPBUDM	1-IMVGT	The NBPBROL and NBPBUDM processes were not excluding other Chart of Accounts when processing even though a Chart was identified in the parameters.

Object	Number	Description
NBPBUDM	1-ISYE9	<p>Encumbrance recasting functionality:</p> <p>When you entered the last day of the fiscal year for the Recast Date parameter, the process only liquidated up through the day before the last day of the fiscal year. This left one day's worth of encumbrance dollars unliquidated. The process must liquidate all days within the fiscal year.</p>
NBPBUDM	1-IYNV6	<p>The process would not accommodate multiple fringe override FOAPALs per encumbrance number.</p> <p>Changes to fringe distribution overrides on NTRFBLD, or a change to the employee class on NBAJOBS could cause encumbrance transactions to error out in the Banner Finance Posting process (FGRACTG).</p>

Object	Number	Description
NBPBUDM nbkp_job_labor1.sql	CMS-DFCT13415	<p>The process was not calculating encumbrance values correctly (under the System-Generated method) when an NBRJLBD record did not exist equal to the Contract Start Date.</p> <p>A job has contract start/end dates of 8/21/98 and 6/20/99. The records in NBRJLBD had effective dates of 7/1/98 (fiscal year begin date) and 1/21/99.</p> <p>When NBPBUDM was run, no encumbrance dollars were assigned to the 7/1/98 record, only the 1/21/99 record. The 1/21/99 NBRJLBD record had the correct dollars, but the 7/1/98 record had zero dollars. This caused the job to be under-encumbered.</p> <p>If paper fix 223 was applied, the problem would occur. If paper fix 223 was not applied the encumbrance calculation would be correct, but the process could abort with a <i>Fetch out of sequence</i> error.</p>
NBPBUDM nbkjenc.sql nbkjenc1.sql	CMS-DFCT4223	<p>Encumbrance - If a job was not active at the start of the fiscal year and was later reactivated with a new LD entered using the same effective date, NBPBUDM created a LD effective the first day of the new fiscal year, which allocated a prorated portion of the encumbrance to that LD, even though the job was not active at that point in time. This occurred with both Value Input and Annual Salary encumbrance methods.</p>
NBPSPEX	CMS-DFCT104023	<p>For sites that did not license Banner Finance, the process would abort when extracting jobs information when validating the jobs effective date.</p>

Object	Number	Description
NBPSPEX NBPSPUP	1-OG4VY	Processes would not compile under Solaris 10 on a Sun T2000 server, Oracle DB 10.2.0.2.
NBPSPUP nbkbudg.sql nbkbud1.sql	1-12Z7WO	NBPSPUP reported an out of balance error when there was no out-of-balance situation.
NHPFIN1	1-23C8EY	Premium earnings budget changes were not interfaced properly by NHPFIN1. This happened only when the salary budget amount was zero.
NHPFIN1	CMS-DFCT102293	<p>COBRA interface transaction issues:</p> <p>When no administrative fees were being assessed (on PTRCBEN) and someone overpaid the COBRA premium due, the process was creating transactions for premium overpayment amounts as admin fees. It should be including the overpayment amount in the premium amount transaction.</p> <p>In addition, when no administrative fees were being assessed, no override for the fees were entered on PTRCBEN. The NHPFIN1 process was creating transactions (for the previous issue above) with no FOAPAL thus causing the finance posting process to abort. A message should be issued alerting users of this situation with the transaction not created.</p>
NHPFIN2	1-D47KW	In the Detail report section, the Pay Period dates, located in the sub-heading, might not be correct if you were feeding information for the same pay ID and pay number, but multiple payroll years.

Object	Number	Description
NBPBUDM nokmup1.sql	1-GK6SI	There was a performance problem in the Budget Maintenance Process (NBPBUDM) in the p_calc_endc_num function that generates encumbrance numbers. The function was doing full table scans on NBRJLBD, not using the NBRJLBD_KEY2_INDEX. This was because of the database NVL function within p_calc_endc_num. This could affect both the NBAJOBS and the NBPBUDM batch process.
PARMAPP	1-1IK02X	After a few lines of data print, the following line would start printing between valid print lines in the report. .print_req_no
PDPFLEX	1-GLHGJ	A termination status record was not being inserted into PDRDEDN when the deduction end date was entered on PDAFLEX.
PDPLIFE	1-B7NT4	The PDPLIFE process wouldn't accommodate a dependent age less than 1 year old. For dependents less than 1 year old, the process used the employee's age to calculate a premium. With a dependent less than 1 the process was truncating the months into 1 year which is incorrect.
PDPLIFE	1-NXPKT	When a dependent life insurance coverage exceeded \$2,000, PDPLIFE only taxed the amount that exceeded \$2,000, not the entire amount as specified on the www.irs.gov website.

Object	Number	Description
PDRBCOV	1-CSPEH	The PDRBCOV Report (Beneficiary Coverage of Employees) might not properly report beneficiary names. This was because the sel_spriden function was not checking the spriden_chang_ind field for being null, thus ensuring that the most current information was selected.
PEREO41	1-KVYJF	This is happening only on NT environment. The PEREO41 process would not save the output files from the PEREO42 process into the database.
PEREO41	LN70-0227-3420	After submitting the PEREO41 process from Job Submission (and receiving a sequence number) GJIREVO displayed an error: <i>Process does not exist in the database.</i> PEREO41 uses a shell script to run and both the pere041 and pere042 are run at the same time, similar to IPEDS report. The shell script would not write the output to the database. That's why GJIREVO couldn't find it. Needs output to the database so it can be viewed on GJIREVO.
PEREO62	CMS-DFCT92557	Windows 2000 Platform Only. When submitting the PEREO61 process from job submission, the pere062.txt file (used for uploading to the web) was not being placed in the jobsub directory. It was being placed in the general/misc directory.

Object	Number	Description
PEREO62	1-2ZSQCD	<p>Process could abort with the following error:</p> <p>ORA-00904: "PEREE": invalid identifier WRN-ORACERR:</p> <p>Error occurred in file "pereo62.pc" at line 2511</p> <p>WRN-ERRSTMT: Following statement was last statement parsed:</p> <pre>SELECT pereeot_line_male_cnt+pereeot_line_female_cnt FROM pereeot WHERE pereo62 terminated with error</pre> <p>252 lines written to /sct/jobsub/pereo62_292772.lis</p>
PEROSHA	1-12Z7NZ	The OSHA Form 300/300A Process (PEROSHA) was reporting people having days away or a job transfer that overlap into the time frame requested for the report.
PEROSHA	1-2AUG4Q	If a Health and Safety Incident had an Involved Person/Party with multiple medical conditions with staggered dates, and the medical condition Begin Date did not fall within the PEROSHA report parameter Start Date and Stop Date , the medical condition will not be printed on the OSHA Report.
PEROSHA	1-9913E	The PEROSHA report was not calculating both Away from work days and Job Transfer. days when both classification records existed on PEAHSIN.

Object	Number	Description
PEROSHA	1-PCMRJ	<p>Process would abort when there was no medical end date and the classification is A or J.</p> <p>ORA-01405: fetched column value is NULL WRN-ORACERR:</p> <p>Error occurred in file "perosha.pc" at line 1150 WRN-ERRSTMT: Following statement was last statement parsed: declare cursor med_datesC is SELECT trunc (PERHSIM_BEGIN_DATE) , true perosha terminated with error.</p>
PHPCALC	1-CET20	<p>Process would not compile successfully in an OpenVMS 10g environment.</p>
PHPLEAV	1-2BW979	<p>Process would abort with ORACLE error:</p> <p>ORA-1839: date not valid for month specified.</p> <p>This was happening for employees who track leave by job and the Date Available in the Employee Leave Balances window of PEALEAV had a date of <i>29-FEB-1996</i>.</p>

Object	Number	Description
PHPLEAV	1-ISYJO	<p>PHPLEAV could abort if the FTE value on NBAJOBS is greater than 1 and leave by job was being used. PHPLEAV displayed the following error when the condition existed:</p> <p>Parameter Sequence Number:</p> <p>ORA-01438: value larger than specified precision allows for this column</p> <p>WRN-ORACERR: Error occurred in file "phpleav.pc" at line 2487</p> <p>WRN-ERRSTMT: Following statement was last statement parsed:</p> <pre>insert into phrjacr (phrjacr_year,phrjacr_pict_code , phrjacr_payno,phrj</pre> <p>phpleav terminated with error</p>
PHPMTIM	1-24BW9N	<p>FLSA Overtime would not calculate correctly when there was a new effective date record on NBAJOBS during the pay period.</p> <p>The FLSA calculation would not include any hours entered for the specific day of the NBAJOBS change.</p> <p>Example:</p> <ol style="list-style-type: none"> 1. Pay period is bi-weekly-starts on Sunday and ends on Saturday (4/1 - 4/14) 2. FLSA period is 7 days-starts on Sunday and ends on Saturday 3. Future change entered on NBAJOBS, effective 4/10 4. The hours reported on 4/10 are not included in the overtime calculation.

Object	Number	Description												
PHPSHRS	1-1SP26M	<ol style="list-style-type: none"> 1. The query for obtaining the VISA status from GORVISA could return multiple rows when it should only return the row that is most current as of the pay period end date. 2. The Deduction status was not being updated back to the Active (A) status in the following scenario: <ol style="list-style-type: none"> 2.1. Student was working in a student employee position 2.2. Student was enrolled in classes in the previous term, but is not enrolled in classes in the current term (thus no <code>sfbetrm</code> for current term exists). 												
PHPSHRS	1-2D5ZFD	<p>PHPSHRS would change a student's deduction status if they previously had jobs in a payroll and did not currently.</p> <p>For example the student's job records look like this:</p> <table border="1"> <thead> <tr> <th>Job Date</th> <th>Suffix Pict Code</th> <th>Begin Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td>000001</td> <td>00</td> <td>01-jan-2006</td> <td>30-jan-2006</td> </tr> <tr> <td>000002</td> <td>00</td> <td>01-jan-2007</td> <td>30-dec-2007</td> </tr> </tbody> </table> <p>When PHPSHRS is run for 2007 BW 1, containing dates 01-Jan-2007 through 14-Jan-2007, the student's deduction records are changed despite not having an active job. This should wait until 2007 MN 1 is run.</p>	Job Date	Suffix Pict Code	Begin Date	End Date	000001	00	01-jan-2006	30-jan-2006	000002	00	01-jan-2007	30-dec-2007
Job Date	Suffix Pict Code	Begin Date	End Date											
000001	00	01-jan-2006	30-jan-2006											
000002	00	01-jan-2007	30-dec-2007											
PHRLRAR	1-1VLXQR	The report would not accommodate a 3-digit pay number.												

Object	Number	Description
PCRCORT	1-2H7LW1	<p>The Help field (Hint line on GJAPCTL) displayed incorrect values for parameter 2. It currently read:</p> <p>A=All COBRA Persons, C=Covered COBRA Persons, U=Unenrolled COBRA Person".</p> <p>It should read:</p> <p>1=All COBRA Persons, 2=Covered COBRA Persons, 3=Unenrolled COBRA Person.</p>
PERTERM	1-KU83F	<p>PERTERM starting message incorrectly showed:</p> <p><i>Starting PERTERM (Release 2.1.5)\n</i></p> <p>while the audit trail shows 3.1 as latest/current version.</p>
PORAUDT	CMS-DFCT103705	<p>Changes made to addresses on the Identification Form (PPAIDEN) (or via the web) were not accurately reflected on the Audit Trail Report (PORAUDT). If a change was made to address lines 2 and 3, the report would list Address Line 2 twice, and would not print Address Line 3.</p>
PXPVRFY	1-CESUG	<p>Process would not compile successfully on VMS running Oracle 10g.</p>
PXPW206	1-1KFXBP	<p>The RS (state) record was incorrectly formatted when the only data being reported on the RS record was local information (ie, locality, county, school).</p>
PXPW206	1-1LQDV8	<p>Employee names were reported in mixed case in the W2REPORT file. They should all be in upper-case, with the exception of Contact Email/Internet.</p>

Object	Number	Description
PXPW206	1-1N8J8K	Unemployment wage totals were understated when the process was run for any quarter. The unemployment totals from PXRW206 were correct.
PXRW206	1-1KLRID	<p>The PXRW206 W-2 Print Process was only printing information for one state and one locality per W-2 using the 4-up laser format. It should print information for two states and 2 localities per W2 if the employee had reportable information for more than one state/locality.</p> <p>Currently two W2's are produced for this situation.</p>
PXRW206	1-1I5R7J	<p>Process was not properly handling last names that were larger than the space allotted for them. This caused the process to abort with the following error in the .log file:</p> <pre>ORA-06502: PL/SQL: numeric or value error: character string buffer too small ORA-06512: at line 1 WRN-ORACERR: Error occurred in file "pxrw206.pc" at line 2767 WRN-ERRSTMT: Following statement was last statement parsed: declare empl_first_name VARCHAR2 (100) ; empl_last_name VARCHAR2 (1pxrw206 terminated with error</pre>
PXRW207	1-3B5QEB	<p>The Control report wouldn't list values entered for report parameter 6, nor any errors associated with this parameter.</p> <p>When errors existed for parameter 6, the control report simply stated:</p> <p><i>Parameter error(s) halted program execution.</i></p>

Object	Number	Description
PXRW207	1-3BF8BG	<p>When using the reprint parameter on PXRW207, address errors were ignored and W-2s were printed with no address.</p> <p>Since the process to create W-2s did not save address information, any address changes were reflected during the reprint process. If an address had been inactivated or removed, the reprint process should produce a <i>No address information</i> error, but does not.</p>
PXRW2PR PXPW2MP	1-1JMMJE	The 6.2.2 versions of pxpw2mp.pc and pxrw2pr.pc were delivered in the 7.2.3 upgrade.

Object: Access Views

Object	Number	Description
pbvslb1.sql ap_salary_budget	CMS-DFCT104513	<p>PBVSLB1 and AP_SALARY_BUDGET views contained duplicate records for each position and fiscal year.</p> <p>Based on the key attributes, these views should return one row for each position per fiscal year for every combination of Budget ID, Budget Phase, Effective Date, and Budget Status.</p> <p>The view PBVSLB1 should contain the following addition to the where clause:</p> <pre>and nbrptot_coas_code = nbbfisc_coas_code</pre>