Banner ID Conversion: Identifying Banner Records During and After the Conversion

Prepared for all Banner users
Fall 2007
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Complete Training Info @ campus.belmont.edu/acit/buid.htm
Agenda

- What is the BUId?
- What is the timeline for the project?
- How can I find the BUId for a record?
- What happens if I enter the BUId and there is no match?
- Can I still search by SSN?
- How can I find records in Imaging?
- How can our internal customers who use BannerWeb find BUIds?
- What are some best practices for protecting confidential data such as SSN?
What is the BUId?

- It is the value assigned in the ID field of many Banner forms, including, but not limited to:
  - SPAIDEN
  - APAIDEN
  - PPAIDEN
  - FOAIDEN
- Formerly the value was SSN.
- After our ID conversion it will be a randomly generated ‘B number’.
- Current employees and students will receive their B number in a letter. They will also have the opportunity to receive an ID card sticker containing their B number.
- Here’s an example...
BUid example...

```
ID: [Field]

Person
- Last Name
- First Name
- Middle Name
- Prefix
- Suffix
- Preferred First Names
- Full Legal Name

Non-Person
- Name

ID and Name Source
- Last Update
  - User:
  - Activity Date:
  - Origin:

Original Creation
- User:
  - Create Date:
```

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But, SSN/SIN/TIN is still maintained.
Timeline

- 11.xx.07 and ongoing – project training / communication.
- 11.26.07 – existing records have IDs converted from SSN to BUId, but they are not active in Banner yet.
- 11.26.07 – coordination of BUId communication begins (i.e., stickers and letters).
- 12.xx.07 – in early Dec letters are mailed to employees and students identifying their new BUId.
- 12.26.07 – ID’s that were converted from SSN to BUId on 11.26.07 are active in Banner.
- 01.xx.08 – stickers are available for pick up in various locations / dates / times on campus.
Identifying Banner Records

- If you know the entity’s BUId, then enter it.
  - If the value is located, then the name will appear.
  - If the value is not located, then you’ll receive an error.
- If you don’t know the entity’s BUId, then you’ll search for it.
  - Query GUIALT for the last 4 digits of SSN.
  - Or, search by name then reduce the search by looking for the last 4 digits of SSN.
- Here are some examples…

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What happens when I enter BUid?

- BUid entered…
  - Value found, name displays
  - Value not found, error generated
BUid entered, name appears
BUid entered, name does not appear, error generated
How can I search for BUId?

Option 1: GUIALT
GUIALTI is accessed, % and last 4 digits of SSN are entered in the SSN/SIN/TIN field, last name entered in the last name field, then execute query is performed.
Desired record is highlighted, then user exits form
User is taken back to Main Menu where other forms can be accessed.
After a new form is accessed the selected student appears in the ID field.
Special GUI ALT I Note

- It is accessible from the ID field LOV on many forms
- Click the drop down arrow next to ID
- Select Alternate ID Search, if available
- Query for your record
- Select the record needed
How can I search for BUid?

Option 2: Name search, last 4 of SSN search reduction
Searching based on name

- Access the desired form.
- Clear the ID field and press tab.
- Enter the name, use wildcard (%) if desired and press return.
- If the one match is found, then the BUId appears in the ID field.
- If more than one match is found, then the ID and Name Extended Search Window appears, allowing the user to either reduce the search or select the appropriate record.
- Reduce the search by entering % and the last 4 digits of SSN in the SSN field.
- Click the Reduce Search button.
- Select the matching record and return to the original form.

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Record is located and appears in form’s ID field
Can I still look up by SSN?

- If you have the SSN and want to use it to identify a record then you can still do this.

    But…

    We strongly discourage the practice of asking customers for their full SSN in order to locate a record in Banner. Our efforts in the BUid conversion are to protect confidential information. Those efforts are weakened when students, employees, donors and/or alumni are asked by university agents to identify themselves by their full SSN.

- Here’s what it looks like…
What happens when I enter SSN?

- SSN entered…
  - Value found, name displays
  - Value not found, error generated
SSN Entered, Record Found

- Access the Banner form needed (e.g., SADHOLD).
- Enter the SSN.
- Observe the SSN value you entered revert to the current BUid, the person’s name display and the hint line message in the lower left hand corner, “Warning SSN/SIN/TIN replaced with current ID.”.
SSN entered, name does not appear, error generated
Finding Records in Imaging

- If BUID is known, enter it here.
- If full or partial SSN is known, enter it here using the wildcard (i.e., asterisk, *) as needed.

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What **not** to do…

- Ask a customer for his/her full SSN.
What to do…

- Review the ways you can identify records in Banner and decide which one works best for the situations you encounter daily.
- If the customer doesn’t know his/her BUid then ask for full, legal name and last 4 digits of SSN/SIN/TIN.
- Recognize that during 11.26.07 and 12.26.07 new records will have BUids and records existing prior to 11.26.07 will have SSN as ID.
- After 12.26.07 all records will have BUids.
- Look for the SSN/SIN/TIN in the appropriate SSN/SIN/TIN field for your Banner module.
- Talk to others in your department about this project.
- Review our web sites regularly for updated information.
And… For our BannerWeb Users

- There are BUid look up screens offered online in BannerWeb to Advancement professionals, Faculty and Budget Managers.
- You’ll need full, legal name and last 4 of SSN/SIN/TIN to use the look up screen.
- If you service either of these internal customers and find that they have questions about how to locate a BUid then refer them to this document: http://campus.belmont.edu/acit/buid.htm
Protecting Confidential Data (1 of 2)

- If you don't need the SSN, delete it completely from any non-Banner databases and from any other electronic formats such as reports / lists.
- If you can't delete the SSN, consider masking it down to the last four digits.
- If you store hardcopy files with the SSN, make sure these files are in locked filing cabinets and / or in locked rooms.
- Limit access to electronic databases / files and hardcopy files only to faculty and staff that have a business reason to access the information.
- Password-protect desktop computers and laptops that have SSN stored on them.
Protecting Confidential Information (2 of 2)

- Do not leave hardcopy files / reports / lists containing the SSN in a public area - this includes on a desk in an open office.
- Shred all hardcopy files / reports / lists containing SSN that are no longer needed.
- If electronic backups are created of databases that contain the SSN, these backups need to be stored in a secure location and password protected if possible. These should also be destroyed appropriately once the backup is no longer needed.
- Refrain from sending the SSN in an email or a fax. These can easily be intercepted or sent to the wrong address / number.
- If the SSN is sent off campus in an electronic format, it should be encrypted.
- Close software applications containing SSN, such as Banner, when they are not being used and/or when you leave your office area.
More Details and Help

- Read the Banner users’ document located @ [http://campus.belmont.edu/acit/buid.htm](http://campus.belmont.edu/acit/buid.htm) & our public project site @ [http://www.belmont.edu/acit/buid](http://www.belmont.edu/acit/buid)
- Review these sites regularly in the following weeks and after the first of the year.
- Email [buid@mail.belmont.edu](mailto:buid@mail.belmont.edu)
- Call 460-5400. When this voice mail line is answered enter 1791, listen to the greeting and leave a message.
- We will return emails and phone calls promptly.