HR REPORTING CONCEPTS

This document provides reporting tips and guidelines for use of Banner data. The two primary data sources referenced in this document are the Electronic Data Warehouse (EDW) maintained by Decision Support and the Banner Report Copy. Please note that there is limited access to the Banner Report Copy, and not all users have report writing access. There may be some fields referenced that are currently not available in the EDW, and therefore the Banner Report Copy information is provided. Those fields are in the process of being added to the EDW.

Business Concept	Selection Criteria
ACADEMIC	
Academic Employees (Faculty, Other Faculty, Academic Professional, Post Doc's, Interns, Graduate Assistants, Post and Pre Doctoral Fellows, Academic Unpaid, and Academic/Grad Hourly)	E-Class begins with A, B, R, G, U, and H
Less than 9 Month Academic	Academic: E-Class = AE, AF, BJ, BK
9/12 Month Academic	Academic: E-Class = AA, AB, AC, AD, BC, BD, BE, BF
10/12 Month Academic	Academic: E-Class = AG, AH, BG, BH
10/10 Month Academic	Academic: E-Class = AN, AQ, BL, BM
12/12 Month Academic	Academic: E-Class = AL, AM, BA, BB
Adjunct	Faculty or Academic P-Class structure, 5th Char = D
Interim	Faculty or Academic P-Class structure, 5th Char = B
Acting	Faculty or Academic P-Class structure, 5th Char = C
Visiting	Faculty or Academic P-Class structure, 5th Char = F
Visiting Adjunct	Faculty or Academic P-Class structure, 5th Char = E

FACULTY	
Faculty	E-Class begins with A
Faculty - Tenured	E-Class begins with A, Tenure Code = A
Faculty - Tenure Track	E-Class begins with A, Tenure Code = P or Q
Faculty - NonTenured	E-Class begins with A, Tenure Code = N
Professor	E-Class begins with A, P-Class 1st Char = A, 3rd Char = A. Also can be determined from rank table using Institutional Rank Code = 1 for Professor or 4 for Research Professor.
Associate Professor	E-Class begins with A, P-Class 1st Char = A, 3rd Char = B. Also can be determined from rank table using Institutional Rank Code = 2 for Associate Professor or 5 for Research Associate Professor
Assistant Professor	E-Class begins with A, P-Class 1st Char = A, 3rd Char = C. Also can be determined from rank table using Institutional Rank Code = 3.
Faculty Rank Modifier	E-Class begins with A, P-Class 1st Char is A, B or C, 4th Char = Rank modifier
Faculty Status Modifier	E-Class begins with A, P-Class 1st Char is A, B or C, 5th Char = Status modifier
Emeritus	P-Class 5th Char = G
Post Docs and Interns	E-Class = PA, PB and PC

Residents	E-Class = RA, RB

ACADEMIC PROFESSIONALS	
Academic Professionals	E-Class begins with B, P-Class begins with E - U
Standard PAPE Titles	National Occupation code (PAPE code) = 49901, 49902, 49903, 49904, 49905, 49906, 49907, 49908, 49909, 49910, 49911, 49912, 49913, 49914, 49915, 49916, 49917, 49918, 49919, 49920. EDW: Position History Table, PAPE Civil Service Identifier field
AP Functional Indicator	P-Class begins with E- U, 3rd Char indicates Function
AP Functional Descriptor	P-Class begins with E - U, 4th Char modifies and adds description to the 3rd Char Function code
RAMP Administrators	Position Class Attribute Code = ARAMP
AP Status Modifier	P-Class begins with E – U, 5th Char modifies Status (VISTN=Visiting, INTRM=Interim, ADJNT=Adjunct, etc.

GRADUATE ASSISTANTS	
Graduate Assistants	E-Class = GA, P-Class 1st Char = C, 3rd Char = S
	Urbana Graduate Assistants are further defined by Position Class Attribute Codes that begin with either GA, GP, GR or GT

ACADEMIC UNPAID AND HOURLY	
Academic Unpaid	E-Class = UA
Academic Hourly	E-Class = HA
Grad Hourly	E-Class = HG

CIVIL SERVICE	
Status Civil Service	E-Class begins with C or D, Position Class Description Code does not equal 10001, 20001, 30001, 40001, 50001, 50002, 60001, 70001, 80001, 90001
Exempt Civil Service	E-Class = CC, CD, CE, CF, DD, DE, DG, DH, CJ, CK, DN, DP, CL, CM, DR, DS
Non-exempt Civil Service	E-Class = CA, CB, DA, DB, CG, CH, DK, DL
9- Month Staff	Civil Service: Position Class Description Code: PFX09
10 Month Staff	Civil Service: Position Class Description Code: PFX10
12 Month Staff	Civil Service: Position Class Description Code is not equal to PFX08, PFX09, PFX10, PFX11
Civil Service Flex Year	Position Class Description Codes: PFX08, PFX09, PFX10, PFX11
Civil Service Extra Help	E-Class = EH, ES
Civil Service Place of Employment	Position Class Description Code begins with L. Examples: LC = Chicago, LS = Springfield, LU = Urbana-Champaign, LCR = Chicago Rockford College of Medicine, LUA = Urbana Robert Allerton House
Bargaining Unit	EDW: Position History Table, Position Bargaining Unit Code field
Note:	When reporting on the Bargaining Unit Code, the Position History Table and the Job Table need to be linked by position number and job suffix.
37.5 Hour Week	E-Class = CA, CB, CC, CD, DA, DB, CE, CF, DD, DE, DG, DH
40 Hour Week	E-Class = CG, CH, DK, DL, CJ, CK, DN, DP, CL, CM, DR, DS
42 Hour Week	E-Class same as 40 hour week, and Position Class Code = 32881 (Crash and Rescue Security Specialist I (LU)) and 45911 (Crash and Rescue Security Specialist II (LU))
Note:	Civil Service employees working 37.5, 40, or 42 hours per week are all considered 1 FTE.

Reported Hours Worked	EDW: Payroll Accounting Detail Public Table, Payroll Acctg Hours field. The Payroll Accounting Detail Public Table is linked by the Position Number and Job Suffix in order for reported hours worked to be matched to the appropriate job.
Open Range	Salary Table: CA (Chicago), DA (Springfield), EA (Urbana). EDW: Position: Position History Table, Position Salary Table Code. Job: Job Detail History 1 Table, Job Detail Salary Table Code field.
Open Range - Pilot Programs	Salary Table: CB (Chicago), DB (Springfield). EDW: Position: Position History Table, Position Salary Table Code. Job: Job Detail History 1 Table, Job Detail Salary Table Code field.
Established	Salary Table begins with T, EDW: Position: Position History Table, Position Salary Table Code. Job: Job Detail History 1 Table, Job Detail Salary Table Code field.
Prevailing	Salary Table begins with Q (Chicago), R (Springfield), or S (Urbana), EDW: Position: Position History Table, Position Salary Table Code. Job: Job Detail History 1 Table, Job Detail Salary Table Code field.
Negotiated	Salary Table begins with G (Chicago), K (Springfield), or M (Urbana), EDW: Position: Position History Table, Position Salary Table Code. Job: Job Detail History 1 Table, Job Detail Salary Table Code field.
In Probationary Period	EDW: Job History Table, if Job Probation End Date > today's date
Years of Service Calculation	EDW: Employee History 1 Table, calculation using Adjusted Service Date
Anniversary Date	EDW: Contract History Table, Contract Anniversary Date field
Selective Certification	Position Class Attribute Code = PCERT
Date Eligible for Step Increase	Banner Report Copy: NBRBJOB Table, NBRBJOB_STEP_INCR_MON and NBRBJOB_STEP_INCR_DAY fields
Salary Grade	EDW: Position level: Position History Table, Position Salary Grade Code field. Job level: Job Detail History 1 Table, Job Detail Salary Grade Code field.
Salary Range Minimum	EDW: T_POSN_HIST.POSN_MIN_SAL
Salary Range Maximum	EDW: T_POSN_HIST.POSN_MAX_SAL

STUDENT	
Student Employees	E-Class = SA

RETIREE	
Retiree	E-Class = TR

POSITION INFORMATION	
Funding Location	The Organization Code of the C-FOAPAL indicates the organization providing the funding. EDW: Payroll Accounting Detail Public Table, Organization Code field
Budget Approval Authority	Position Class Attribute Code = ABDRS
Supervisory Indicator	Position Class Attribute Code = ASLT, supervises less than 20 employees or ASMT, supervises 20 or more employees
Direct Patient Care	Position Class Attribute Code = PDIPC
Security Sensitive	Position Class Attribute Code = PSENS
Confidential Employees	Position Class Attribute Code = PCONF

Active Position	In order to select current active Positions, EDW: Position History Table, Position Status Description field = "Active". If selection of Position is to include positions that are frozen or inactive, Position Status Description field does not equal "Cancelled". Select appropriate date parameters for the start and end date of the Position. EDW: Position History Table, Position History Effective Date field and Position History Expiration Date field.
Vacant Position	EDW: Position History Table, Position Status Description field = "Active" or "Inactive"
Position Labor Distribution: CFOAPAL Information	EDW: Position Labor Distribution Table, select the following fields that contain CFOAPAL information: Chart of Accounts Code, Financial Fund Code, Organization Code, Financial Account Code, Financial Program Code, Financial Activity Code, Location Code, Grant Code.
Position Labor Distribution: Funding, Amount and Percent Information	EDW: Position Labor Distribution Table, select the following fields: Position Labor Distr Funding Desc, Position Labor Distr Pct, Position Labor Distr Amt, and Position Labor Distr Effective Date.
Position Type (Single or Pooled)	EDW: Position History Table, Position Type Description field = Single or Pooled
Budgeted Position Salary	Banner Report Copy: NBRPTOT Table, NBRPTOT_BUDGET field
Budgeted Position FTE	Banner Report Copy: NBPRTOT Table, NBRPTOT_FTE field
Survey Positions	Academic Professional Survey positions, the P-Class Code 3rd character = "Z". Other Survey positions must be selected by department code.
Extension Positions	Civil Service Extension positions, selected either by the appropriate Position Class Attribute code indicating the location or by department code. Other Extension positions must be selected by department code.
Hospital Positions	Civil Service Hospital positions, selected either by the Position Class Attribute code = LCH or by department code. Other Hospital positions must be selected by department code.
Apprentice, Learner or Trainee Positions	EDW: T_POSN_CLS_HIST.POSN_CLS_DESC contains 10001-90001 in the description.

Job Information	
Active Job	EDW: Job Detail History 1 Table, Job Detail Status Description does not equal "Terminated". Select appropriate date parameters for the start and end date of the Job. EDW: Job Detail History 1 Table, Job Detail History Effective Date field and Job Detail History Expiration Date field.
Terminal Appointment	EDW: Contract Parameter History Table, Contract Type Code. NONR = initial notice of nonreappointment, EXTN = initial notice of nonreappointment period was designated then the notice period itself was extended, TWNF = the existing contract is being truncated early due to special unexpected loss of funds but the employee is due a notice of nonreappointment and the minimum notice period based on length of service will be honored, and TWOF = a contract will be truncated due to special unexpected loss of funding but the employee isn't due any notice of nonreappointment. In addition, terminal Faculty appointments should also have a Faculty Terminal Job Indicator field selected. EDW: Faculty Tenure History Table, Faculty Tenure Terminal Job Ind field.
Job Labor Distribution: CFOAPAL Information	EDW: Job Labor Distribution Table, select the following fields: Chart of Account Code, Financial Fund Code, Organization Code, Financial Account Code, Financial Program Code, Financial Activity Code, Location Code, Grant Code

Job Labor Distribution: Funding, Amount and Percent Information	EDW: Job Labor Distribution Table, select the following fields: Job Labor Distribution Funding Desc, Job Labor Distribution Percent, Job Labor Distr Sal Enc Amt, and Job Labor Distribution Eff Dt.
Job FTE	EDW: Job Detail History 1, Job Detail FTE field, Banner Report Copy: NBRJOBS Table, NBRJOBS_FTE field
Appointment Percent	Banner Report Copy: NBRJOBS Table, NBRJOBS_APT_PCT field. EDW: t_job_detl_hist.Job_detl_appt_pct
Actual FTE Worked	Job FTE * Appointment Percent
Job Day Hours	EDW: Job Detail History 1 Table, Job Detail Day Hours field
Job Pay Hours	EDW: Job Detail History 1 Table, Job Detail Pay Hours field
Total Hours Normally Worked	Sum of Job Detail Pay Hours
Number of Pay Periods Paid	Banner Report Copy: NBRJOBS Table, NBRJOBS_FACTOR field
Primary Job	Job Type = P
Overload Job	Job Type = O
Note:	Overload Jobs with a 0 FTE are excluded from headcount and FTE reporting.
Hourly Rate	EDW: Job Detail History 1 Table, Job Detail Regular Rate field
Monthly Rate	EDW: Job Detail History 1 Table, Job Detail Pay Period Salary field (*For monthly paid employees)
Annual Rate	EDW: Job Detail History 1 Table, Job Detail Annual Salary field
Annualized Salary	(1.0 FTE / Job FTE) * Job annual salary *(Job FTE*ApptPct)

FUNDING INFORMATION	
State Funds	EDW: Payroll Accounting Detail Public, Financial Fund Code field begins with 1
Institutional Funds	EDW: Payroll Accounting Detail Public, Financial Fund Code field begins with 2
Self-Supporting	EDW: Payroll Accounting Detail Public, Financial Fund Code field begins with 3
Grants and Contracts	EDW: Payroll Accounting Detail Public, Financial Fund Code field begins with 4

EARNINGS & PAY INFORMATION	
One Time Payments	EDW: Job Detail History 1 Table, Job Detail Employee Class Code = WT
Summer Pay	EDW: Job Detail History 1 Table, Job Detail Employee Class Code = MM
Lump Sum Pay	EDW: Job Detail History 1 Table, Job Detail Employee Class Code = LP
Note:	One time payments, summer pay and lump sum pay are not included in staff counts. To determine the number of one time payments, headcount should be used.
Pay Factor	The Pay Factor indicates the number of pays per calendar year. Changes to the Pay Factor impact the hourly rate, monthly rate and annualized salary. Civil Service = 26, 12/12 appointment = 12, 9/9 appointment = 9. EDW: Job Detail History 1 Table, Job Detail Annual Pay Count field. Banner Report Copy: NBRJOBS Table, NBRJOBS_FACTOR field.
Shift Pay	Earn Codes: SFL to SFE, SF1 through SF9, SFA through SFL, SHF
Premium Pay	Earn Codes: P01 through P14

Overtime Hours	Earn Codes that begin with O that do not = ORT, OD1, OD2, OPL, OPR, ORO
Sick Termination Payout	Earn Codes:ASI and ATS
Vacation Termination Payout	Earn Codes:ASV and ATV
Compensatory Time	Earn Codes: CME, CMR, CMU, CSE, CSU
Taxable Perquisites	Earn Code begins with T that do not = TIP and TUP

BENEFIT INFORMATION	
Benefit Eligible Staff (Defined as eligible for State CMS Benefit Programs)	EDW: Employee History 1 Table, Benefit Category Code field = M1, M2, B1, B2
Note:	In the EDW table, Employee History 1, there is also a derived benefit eligible field: Benefit Eligible Indicator.
SURS Eligible	EDW: Employee History 1 Table, Benefit Category Code field = M1, M2, M3, B1, B2, B3
Tax Deferred Retirement Program Eligible	EDW: Employee History 1 Table, Benefit Category Code field = M1, M2, M3, M4, B1, B2, B3, B4
403(b) Participants	EDW: Retirement Deduction History Table, Retirement Deduction Code begins with T
HMO vs. Quality Care Health Plan Participants	EDW: Medical Deduction History Table, Medical Ded Code begins with H for health plans, Quality Care plan benefit deductions begin with HQ. Also can be determined from the EDW Benefit Coverage History Table, Benefit Category Code field begins with H for health plans, Quality Care plan benefit deductions begin with HQ.

GENERAL EMPLOYEE INFORMATION	
Active Employee	Current active employee records (including employees on leave) EDW: Employee History 1 Table, Employee Status Code field does not equal T. (If selection of active employee records is to exclude employees on leave, then the Employee Status Code field would = A.) Employee History 1 Table, Employee Current Info Indicator field = Y. Employee History 1 Table, Active Employee Indicator field = Y. Employee Person History 1 Table, Current Info Indicator field = Y.
Years of Service Calculation	EDW: Employee History 1 Table, calculation using Adjusted Service Date
Age	EDW: V_EMPEE_PERS_HIST_3.AGE.
Race/Ethnicity	EDW: V_EMPEE_PERS_HIST_3.IPEDS_RACE_ETH_CATGRY_DESC
U.S. Citizen	EDW: Employee Person History 3 Table, Person Citizenship Indicator Code field = "US"
International Staff	EDW: Employee Person History 3 Table, Person Citizenship Indicator Code field does not equal "US", VISA information can be found in Employee Visa History 5 Table, Current Visa Type Code field, and Visa Issue Nation Code field

HR Campus (Physical) Location	EDW: Employee History 1 Table, HR Campus Code field
Home Campus Code	EDW: Employee History 1 Table, Chart of Accounts Code field

Footnotes:

1. Staff head count report information is typically reported by active employees' primary job, to avoid duplication of employees with jobs split across organizations. Depending on the report request, State of Illinois Survey employees may also be excluded. Overload jobs with a 0 FTE, one time payments, summer pay and lump sum pay are excluded from headcount reporting.

2. Staff FTE (greater than 0) information is typically reported by active employees' jobs by unit, department, college, and/or campus. FTE reports normally exclude Extra Help, temporary employees, one time payments, summer pay lump sum payments and overload jobs with a 0 FTE. Civil Service employees working 37.5, 40 or 42 hours per week are all considered 1 FTE.

3. Employee Class code values can be found on the HR Job Aid: E-Class on DART: https://hrnet.uihr.uillinois.edu/dart-cf/index.cfm?Item_id=2034

4. Employee Class values are found at three levels in Banner: Person, Position and Job. When reporting on the Person E-Class, select the E-Class code field from the EDW Table: Employee History 1. The Person level E-Class determines an employee's benefit eligibility and leave eligibility. When reporting on the Position level E-Class, select the E-Class code field from the EDW Table: Position History. The Position E-Class is defaulted from the E-Class established at the Position Class level, and can be changed to reflect the E-Class characteristics of the Position. When reporting on the Job E-Class, select the E-Class code field from the EDW Table: Job Detail History 1. The Job E-Class can be changed from the Position E-Class default, and provides the E-Class characteristics associated with the job (i.e. job leave category, whether the job is a Lump Sum Pay, a Summer Pay, or a One Time Payment, etc.).

5. Position Class Attribute codes are tied to the Position Class code. The code defaults down to the Position and then defaults down to the Job. In order to query on a Position Class Attribute Code, the report must use the EDW Table Position Class Attribute, Position Class Attribute Code field. The table should be linked by the Position Class Code field when reporting on either positions or jobs. In order to report on Position Class Attribute codes assigned at the Position level, Position Descriptor codes, the report must use the Banner Report Copy Table: PARPDES and the PARPDES_CDES_CODE field. Position Class Attribute code information can be found on the HR Job Aid: Position/Job Descriptor Requirements on DART: https://hrnet.uihr.uillinois.edu/dart-cf/index.cfm?Item_id=2034.

6. Academic Position Class coding structure Job Aid can be found on DART: https://hrnet.uihr.uillinois.edu/dart-cf/index.cfm?Item_id=2034

7. Position Class Code values are found at three levels in Banner: Position Class, Position, and Job. When reporting on the Position Class P-Class, select the P-Class code from the EDW Table: Position Class History. This contains the default characteristics of the Position Class. When reporting on the Position's P-Class, select the P-Class code from the EDW Table: Position History. The Position P-Class Code may indicate that the position is established as a visiting position. When reporting on the Job P-Class, select the P-Class code from the EDW Table: Job Detail History 1. The Job P-Class code may vary from the Position P-Class code for Academic positions, in that it may indicate whether the individual in the job is interim, acting, adjunct, visiting adjunct, visiting, Emerita/us or a Retire/Rehire. For Faculty and Other Academic Positions, the service and rank may also be different than the Position to reflect the service and rank of the employee in the job. Civil Service Position Class Codes should not differ from Position to Job.

8. Standard PAPE Titles can be found in Standard Title Positions section of DART: https://hrnet.uihr.uillinois.edu/dart-cf/index.cfm?Item_ID=1893.

9. Job Change Reason code values can be found in General Banner Information - Change Reason Code Job Aid on DART: https://hrnet.uihr.uillinois.edu/dart-cf/index.cfm?Item_id=2034.

10. Position FTE will indicate the FTE for the Position, whereas Job FTE will indicate the FTE for the job (person assigned to the position in that job).

11. When reporting on the Bargaining Unit Code, the Position History Table and the Job Table need to be linked by position number and job suffix.

12. In the EDW table, Employee History 1, there is also a derived benefit eligible field: Benefit Eligible Indicator.