

## Welcome to the Internet Native Banner Training Guide

# Establish Record – AFFILIATE (ERAFFL)

**There are two types of Affiliates/Contractors that can be entered in Banner HR:**

1. ERAFFL - The affiliate has an indirect association with an organization in the University's chart of accounts (ex. Institute of Human Studies).
2. ERCNTR - The contractor works for an organization contracted by George Mason University (ex. Sodexo).

**The following actions are required to establish an affiliate in Banner HR:**

1. Create a Person Record in SPAIDEN.
2. Create the employee record and job record using NOAEPAF.

This Electronic Personnel Action Form (EPAF) type is used when you are hiring an affiliate employee.

**NOTE:** Sensitive information, such as names, G numbers, and Social Security numbers, is not included in this manual. Please keep in mind that in the live Banner Application all G numbers consist of the letter G followed by 8 digits. If you have any questions about the format of any fields in this manual, please contact the Office of HR & Payroll at (703) 993-2600.

## Navigation Shortcuts



Function	Pull-down Menu Option	Shortcut	Toolbar Icon
Save or Commit	File/Save	F10	1
Rollback	File/Rollback	Shift + F7	2
A) Select	File/Select	Shift + F3	3
Insert Record	Record/Insert	F6	4
Delete Record	Record/Remove	Shift + F6	5
Previous Record	Record/Previous	Up Arrow	6
Next Record	Record/Next	Down Arrow	7
Previous Block	Block/Previous	Ctrl + Page Up	8
Next Block	Block/Next	Ctrl + Page Down	9
Enter Query	Query/Enter	F7	10
Execute Query	Query/Execute	F8	11
Cancel Query	Query/Cancel	Ctrl + Q	12
Print	File/Print	Shift + F8	13
Exit	File/Exit	Ctrl + Q	14
Next Field	Field/Next	Tab	none
Previous Field	Field/Previous	Shift + Tab	none
List of Values	Help/List	F9	none
Show Keys	Show Shortcut Keys	Ctrl + F1	none

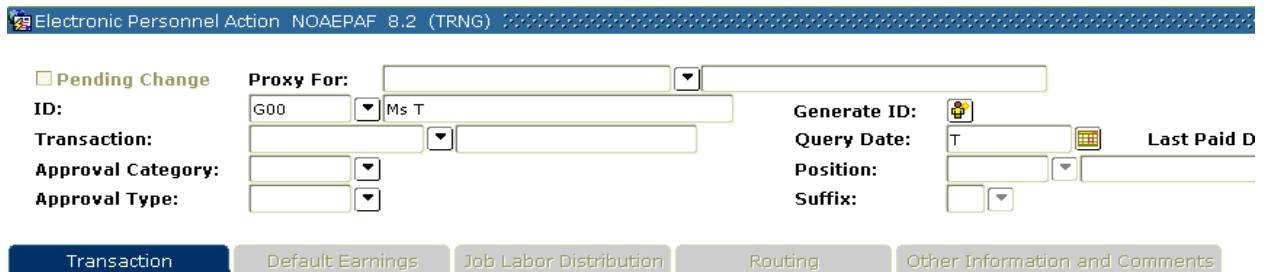
## Step by Step Instructions

Before beginning with this manual, be sure that the affiliate in question has a SPAIDEN record. Refer to the “Entering a New Employee into SPAIDEN” manual for assistance.

1. Type **NOAEPAF** in text box and click **Enter** to begin the EPAF process.

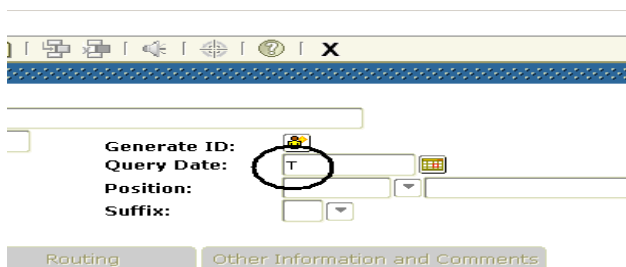



2. This screen auto-populates with the last person for which you were making entries, so be sure to verify you want to enter an assignment for this person. Enter the correct G number in the ID field.

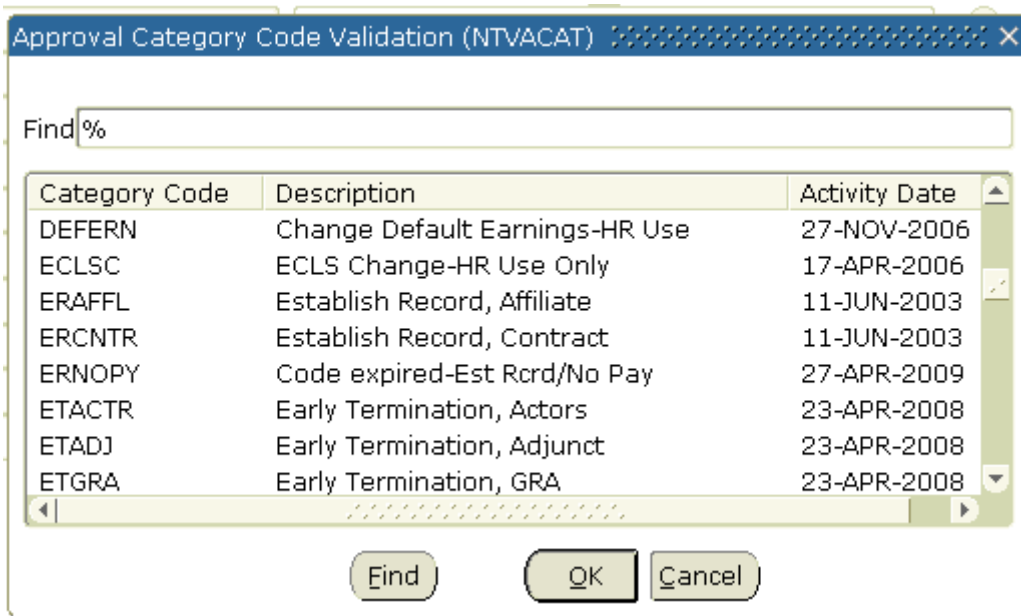


3. Enter the current date in the *Query Date* field and press **Tab**.

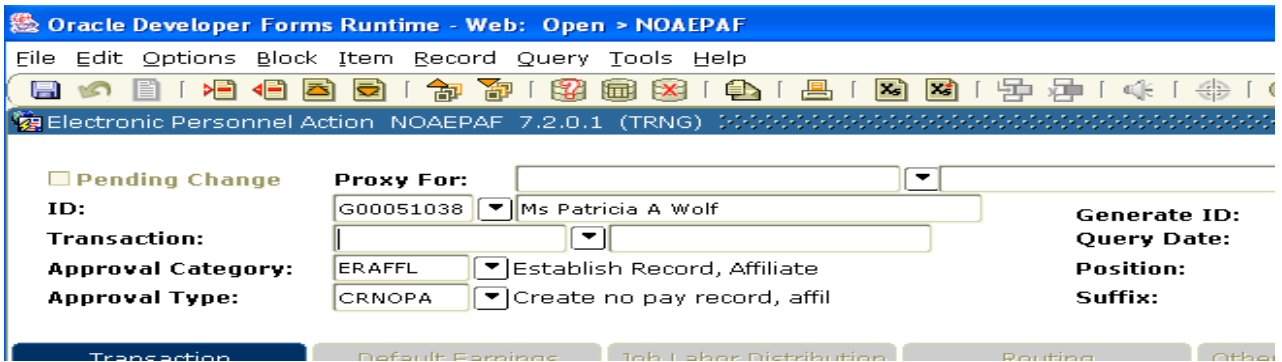
(Shortcuts- if you type the letter **T** and press **tab**, today’s date will be entered.)




4. Enter the appropriate *Approval Category*; select ERAFFL for an affiliate that works indirectly with the University. By clicking the  icon next to *Approval Category* field, the list of acceptable values is displayed. Notice that the description of the action is listed after the text field.



- The **Approval Type** is auto-populated according to the **Approval Category** selected.



- Press both CONTROL and PAGE DOWN or click  **NEXT BLOCK icon** to access the next fields. For original hires, there should be **no** data in the Current Value field. If information appears under Current Value, **stop** and begin again as a current hire. Some information in the **New Value** fields will auto-populate. Most of this information will not need to be changed.

Pending Change    Proxy For:

ID: G00461047    Mr Matthew J Rice    Generate ID:

Transaction:     Query Date: 22-JUL-2008    Last Paid Date:

Approval Category: ERAFFL    Establish Record, Affiliate    Position:

Approval Type: CRNOPA    Create no pay record, affil    Suffix:

Transaction    Default Earnings    Job Labor Distribution    Routing    Other Information and Comments

Applied Status	Field Name	Current Value	New Value
<input checked="" type="checkbox"/>	Employee Class Code		NP
<input type="checkbox"/>	Home COAS		1
<input type="checkbox"/>	Home Organization		
<input type="checkbox"/>	Distribution Orgn		6901
<input type="checkbox"/>	District Code		FX
<input type="checkbox"/>	Current Hire Date		
<input type="checkbox"/>	Last Work Date		-
<input type="checkbox"/>	Employee Status		A

- A. **Employee Class Code** -Will automatically populate with **NP**. It cannot be changed.
- B. **Home COAS** (chart of accounts) - Will auto-populate with **1**. It cannot be changed.
- C. **Home Organization** – Enter the organization number that corresponds to the organization that is sponsoring this person. This is a required field.
- D. **Distribution Organization** – Will automatically populate with **6901**. It cannot be changed.
- E. **District Code** – Enter the campus on which the employee will be located. The field will default to **FX** (Fairfax) but it can be changed. This is a required field.
  - a. To change the field, use the down arrow to highlight the field and select the under “New Value”. A box will pop up with a list of Mason locations. Select the appropriate location and double click.

Transaction    Default Earnings    Job Labor Distribution    Routing    Other Information and Comments

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Employee		SW
<input type="checkbox"/>	Home COA		1
<input type="checkbox"/>	Home Org.		
<input type="checkbox"/>	Distribution		
<input checked="" type="checkbox"/>	District Co		FX
<input type="checkbox"/>	Current Hi		
<input type="checkbox"/>	I9 Form In		R
<input type="checkbox"/>	I9 Date		
<input type="checkbox"/>	I9 Expirati		
	Press LIST fo		
	Approver Actio		Queue Status:

District/Division Code Validation (GTVDICD)

Find: %


Code	Description	Activity Date
AR	Arlington Campus	14-NOV-2001
FC	Fairfax City	04-SEP-2002
FX	Fairfax Campus	14-NOV-2001
HE	Herndon (CIT)	10-DEC-2002
LC	Loudoun County Site	25-APR-2005
NE	Internet	10-DEC-2002
OC	Off-campus/Other	14-NOV-2001
PW	Prince William Campus	14-NOV-2001
RAK	Ras-Al-Khaimah-United Arab Em	09-JUN-2006

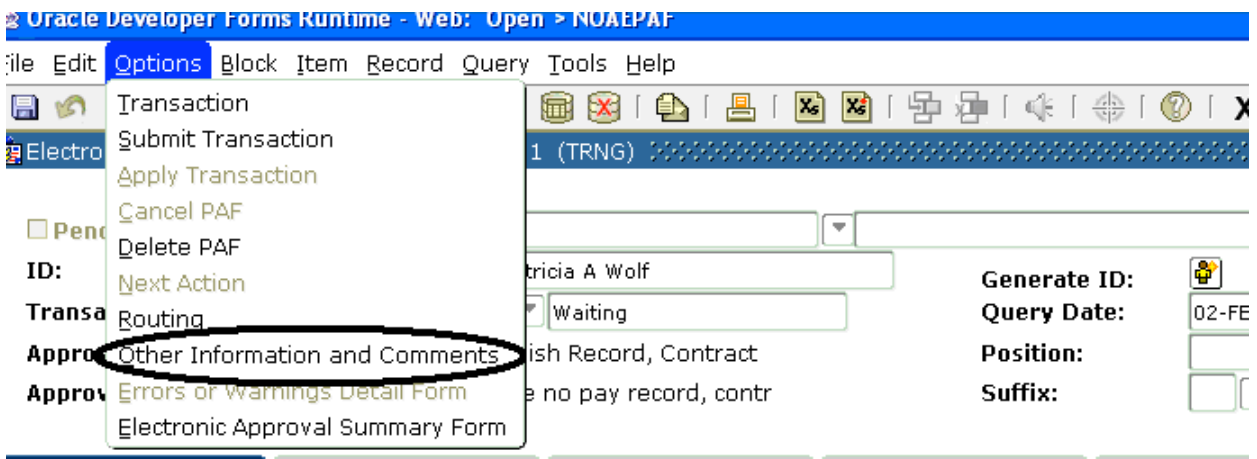
Find    OK    Cancel

- F. **Current Hire Date** – Enter the date the employee is to begin the affiliation with George Mason University. This is a required field.

- G. **Last Day Worked** – Enter the date the affiliation with George Mason University is to end. This is a required field and should only be active for (1) year; Human Resources can extend if necessary.
- H. **Employee Status** – This will auto-populate with A (for active). It cannot be changed.

tatus	Field Name	Current Value	New Value
<input type="checkbox"/>	Employee Class Code		NP
<input type="checkbox"/>	Home COAS		1
<input type="checkbox"/>	Home Organization		431001
<input type="checkbox"/>	Distribution Orgn		6901
<input type="checkbox"/>	District Code		FX
<input type="checkbox"/>	Current Hire Date		01-AUG-2008
<input type="checkbox"/>	Last Work Date		01-AUG-2009
<input type="checkbox"/>	Employee Status		A

- 7. Click the **F10** button or the **Save**  icon and then select **Other Information and Comments** located in the **Options** menu or click on the **Other Information and Comments** tab.
- 8. At this stage, a transaction number will auto-populate. Write down the transaction number! If you take a break and return to the EPAF later, the quickest way to find the EPAF is by searching on the **NOAEPAF** form with the number. The **Transaction Status** indicates where the transaction is in the process. A transaction that has not been submitted will have a status of **Waiting**.



- 9. Enter any pertinent information about the position in the Comment field.

**Entered Date:**       **Submitted Date:**   
**Originator ID:**       **Submitter ID:**       **Application Date Applied to Database:**

**Comment:****Date and Time:**   
**Made By:**

9. Once you have entered information in the **Comment** field, click the **F10** button or the  icon to save.

10. Next click on the **Routing** tab or select **Routing** from the **Options** menu. This is where you will enter the names of the individuals who will approve the EPAF.

Transaction    Default Earnings    Job Labor Distribution    **Routing**    Other Information and Comments

Originator ID:

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
REQAPP	40			Approval	In Queue	
APPLY	90			Apply	In Queue	

A. There are two levels required for all Electronic Approvals - **Required Approver** (level REQAPP) and **Applier** (level APPLY). Enter the usernames for the **Required approver(s)** and **Applier**.

B. The **Required Approver** is generally the departmental approver.

Transaction    Default Earnings    Job Labor Distribution    **Routing**    Other Information and Comments

Originator ID:

Active User ID's for Level Code

Find%

User Id	Name
C	C
C	C
C	C
C	C
C	C
D	D

C. The **Applier** is the person who will finalize the hire in the database. This is **always** an HR Assistant.

D. If the transaction needs to be approved by another unit, it will automatically route to that unit (i.e. OSP, Provost Office, etc.).

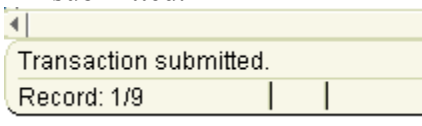
**WARNING:** Once you submit this transaction you *cannot* delete or void it. You will need to contact the appropriate approver or the HR Assistant to have the transaction voided. If you want to delete or void it prior to submission, click **Delete PAF** from the **Options** menu (you must first return to the main body of the EA by selecting “transaction”).

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
REQAPP	40	S	Ms S	Approval	In Queue	
APPLY	90	R	Mr R	Apply	In Queue	

11. Once you have entered routing information, click the **F10** button or the **Save**  icon.

12. To submit the transaction, select **Submit Transaction** from the **Options** menu.

A. If submission is complete, the bottom left corner of the screen will say “Transaction submitted.”



B. If the transaction is not completed, the bottom left corner might note that there are errors or it might take you directly to the “Electronic Approvals Error Message,” **NOIEMSG** page. A transaction with warnings can be submitted (you will need to select “Complete Submit” from the **Options** menu) but be sure the warnings will not negatively impact the transaction. You cannot continue until any errors are corrected. To view any errors, select “Errors or Warnings Detail Form” from the **Options** menu. Control-Page Down to view the errors/warnings.

The screenshot shows a software application window with a menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Help) and a toolbar. The 'Options' menu is open, showing options like 'Submit Transaction', 'Apply Transaction', 'Cancel PAF', 'Delete PAF', 'Next Action', 'Routing', 'Other Information and Comments', 'Errors or Warnings Detail Form' (highlighted), and 'Electronic Approval Summary Form'. The background form displays the following information:

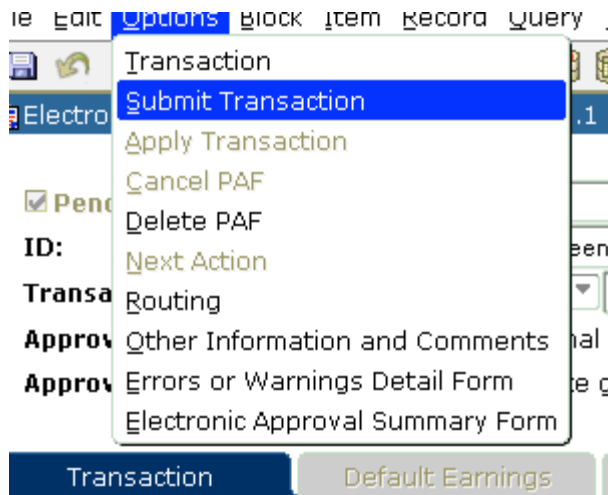
- Name:acey Elizabeth White
- Generate ID:
- Query Date: 22-JUL-2008
- Position: SW139Z (dropdown menu)
- Suffix: 00 (dropdown menu)

At the bottom, there is a tabbed interface with tabs for 'Transaction', 'Default Earnings', 'Job Labor Distribution', 'Routing', and 'Other Information and C'. Below the tabs is a table with the following data:

Applied Status	Field Name	Current Value
P	Jobs Effective Date	13-APR-2008

Approval Type	Error Type	Errors and Warnings Information
GENJBW	ERROR	*ERROR* This employee already has a primary job.

C. Select **Options** from the toolbar and then **Submit Transaction**. If additional errors or warnings exist you will get another screen that outlines the changes you need to make.



D. Once the screen says “Transaction Submitted” The EPAF is on its way to the approver. Note that the Transaction Status has changed from Waiting to Pending.