Guide to *Banner* Default Codes and Index Codes

*Banner* default codes and Index codes help you enter valid C-FOAPAL strings into *Banner* query and transaction forms. Using default codes and Index codes makes data entry easier and faster. Both tools can prevent errors by ensuring that correct Fund, Organization, and Program code combinations are used in transactions. This can greatly reduce instances of misclassified, or “rogue” C-FOAPALs.

Note that default codes and Index codes can only be used in *Banner* forms. They cannot be used in other applications such as FABweb and P-Card. Also, these codes cannot be used in EDDIE, View Direct, or My-Ul-Financials reports.

**Default Codes**

A **default code** is an already-established six-digit Organization, Program, Activity, or Location code that is associated with a Fund code. The default code is automatically populated (or defaulted) into *Banner* forms when you type in the associated Fund code. A default Fund, Program, Activity, and Location code can also be associated with an Organization code.

Here’s an example showing the Organization and Program fields after entering a Fund code that has default codes associated with it (circled):

### Index Codes – Non-Grant Funds

An **Index code** is a six-digit code created by University Accounting and Financial Reporting at a user’s request. An Index code usually has a Fund, Organization, and Program code assigned to it. In addition, an Index code could have an Activity or Location code assigned to it, but this is optional.

For non-grant Funds, Index codes are unit-specific and start with the three-digit Organization code assigned to the unit. The Index code could have a description of up to 35 characters, which will be seen when the Index code is used in *Banner* forms that display field descriptions. Index codes for non-grant Funds also have effective and termination dates, which means you can’t use the Index code for transactions outside those dates. Here’s an example showing the Fund, Organization, and Program fields after entering an Index code (circled):

### Index Codes – Grant Funds

Index codes for grant Funds are created by the OBFS Grants and Contracts Office when a grant is set up. Like all Index codes, they help prevent accounting errors and creation of misclassified FOAPALs. Index codes for grants only have a Fund, Organization, and Program code assigned to them. You cannot override the Fund code and the Program code for a grant Index code. You can only override the Organization code, if needed.
A grant Index code has six alphanumeric characters. These Index codes do not begin with a 3-digit Organization code (as non-grant Index codes do); instead, grant Index codes begin with the 5-digit grant code. They always start with the character shown in the table below.

<table>
<thead>
<tr>
<th>University</th>
<th>US Trust</th>
<th>Other Gov</th>
<th>Private</th>
<th>State of IL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urbana-Champaign</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
</tr>
<tr>
<td>Chicago</td>
<td>E</td>
<td>F</td>
<td>G</td>
<td>H</td>
</tr>
<tr>
<td>Springfield</td>
<td>J</td>
<td>K</td>
<td>L</td>
<td>M</td>
</tr>
</tbody>
</table>

The first five characters designate the grant code. The sixth character is defined by the OBFS Grants and Contracts Office and is in numerical sequence. The first assigned Index code for a specific grant code will end in 1, the next Index code will end in 2, and so on. An example is grant code A1000, which would have an Index code of A10001. The next Index code for that grant would be A10002.

**Requesting New Codes**


When the Grants and Contracts Office creates a grant Fund code in Banner, they also set up default codes and an Index code for it. Therefore, you don’t need to request default codes or Index codes for grant Funds. For more information on Index codes for grant Funds, see Grants & Contracts for Professional and Administrative Personnel (GC 101).

The following table shows how default codes compare to Index codes.

<table>
<thead>
<tr>
<th>Comparison</th>
<th>Default Code</th>
<th>Index Code</th>
</tr>
</thead>
</table>
| **How does it work?**    | 1. Type a Fund code that has defaults associated with it into the Fund field of a Banner form.  
2. Press the TAB key.  
3. The Organization, Program, Activity or Location fields are populated with the assigned default codes for that Fund code. Fund, Program, Activity, and Location default codes can be set up for Organization codes as well. | 1. Type a six-digit Index code into the Index field of a Banner form.  
2. Press the TAB key.  
3. The Fund, Organization, Program, Activity, or Location fields are populated with the codes assigned to that Index code. |
| **What is it used for?**  | Default codes are best used for non-State and non-ICR Funds when there is only one Organization and one Program code assigned to the Fund code. Default codes cannot be established for State and ICR Funds because multiple Organizations are assigned to each of these Funds. | Index codes may be established for any Fund Type. For non-grant Funds, Index codes are unit-specific and start with the unit’s three-digit Organization code. The remaining three digits may be defined by the user. Index codes for grants start with the five-digit grant code. There is one Index code assigned to each grant Fund. |
| **Can it be overridden?**| Default codes can be manually overridden. However, once a code is manually overridden, the possibility for error is present. | When you request an Index code, you can specify whether the codes assigned to it can be overridden. However, once a code is manually overridden, the possibility for error is present. Index codes for grants can only have their Organization codes overridden. |