How to view, add, and update addresses

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Overview

Addresses for McGill staff are maintained in Banner. Students are responsible for maintaining their own address information in Minerva; students with a Campus address must send email or a new Personal Data Form to have the Campus address updated in Banner.

Updating records versus adding records

In most cases, when you need to correct errors or to update to a new address, you simply overwrite the address.

Examples: correcting an error in John Doe's permanent address, updating Jane Doe's campus address to another campus address.

There are two notable exceptions:

Updating permanent and mailing addresses — These addresses are tracked over time. This means that when a staff member has a *new* permanent or mailing address, you should add a new record of the same type rather than overwriting the previous one.

Changing a campus address to an external address — These two address types are mutually exclusive, so you must end the campus address and add a new external address.

To do this …	Use the steps in …
View addresses associated with a person	"How to view an address" on page 2
Add a new type of address for the person or Update a permanent or mailing address	"How to add a new address" on page 3
Correct errors in a current address or Update an address (except permanent or mailing)	"How to update an address" on page 5
Enter the name and phone number of one or more persons to contact in an emergency	"How to add emergency contact information" on page 6

How to view an address

1   Enter GYAADDR in the **Go To …** field on the **Main Menu**, or select it in the **General Fast Track Menu**.

The GYAADDR form is displayed.

2   Fill in the key block:

a   Enter the person's complete ID, if known.

or

Click ▼ beside **ID** to search for the person, using the Person Search form (GYASINS). Select the correct person in GYASINS to bring the person's name and ID into the GYAADDR form.

Addresses GYAADDR [1.8] (TRAIN7) ░░░

ID: 777777123 ▼ Ms Easter A Henry   Addresses: ○ All
                                                                            ● Current

| Address | Emergency Contact |

From Date: 09-MAY-2007 📅   **To Date:** [   ] 📅   ☐ **Inactivate Address**

Address Type: BU ▼ Business/Organization   **Source:** [   ] ▼
Sequence Number: 2

Street Line 1: 123 Anywhere
Street Line 2: [   ]
Street Line 3: [   ]
City: Montreal
State or Province: QC ▼ Quebec

ZIP or Postal Code: J4V 3Z5 ▼

County: [   ] ▼
Nation: 000 ▼ Canada

Telephone Type: REG ▼ Phone Number
Telephone: 514 - 9236298 [   ] ▼

Last Update

User: DSMITH
Activity Date: 09-MAY-2007

b   Check one of the following **Address** checkboxes:

– Leave the default (**Current**) to view only the current addresses for the person.

– Check **All** to view all current and past addresses for the person on Banner.

3   Next Block to display the address information associated with the specified ID.

4   Use the scroll bar to scroll through the list of addresses.

5   To view another person's address, click Rollback and enter a new ID.

How to add a new address

Use this procedure when:

• Adding a new address type for the person. Examples: to add the first mailing or campus address for Jane Doe, or change a campus address to an external address.

• Updating a person's permanent address or mailing address. This allows McGill to track a person's permanent and mailing address over time.

• Updating a person's address from a campus address to an external one. These two address types are mutually exclusive, so you must end the campus address and add a new external address.

Verify existing addresses

1   Verify whether an address of the same type already exists; use the scroll bar to scroll through the list of current addresses.

If …	Then …
There is no current address of the same type	Skip to step 2.
There is an existing address of the same type which must be updated (other than permanent or mailing address)	Don't add a new address. Use the steps in "How to update an address" on page 5.
There is an existing permanent or mailing address which must be updated or An existing campus address which must be changed to an external address type	Enter the last effective date for that address in the **To** field. You can either click on 🗓 to select a date from a calendar or type in the day and \<Tab\> to the next field. Then, go to step 2.

Add address information

2   Click the **Insert Record** icon .

3   Specify the **Address Type**:

– Enter the two-character address type code, such as **PR** for Permanent.

or

– With the cursor in **Address Type**, click and select the appropriate code.

4   In the **From Date** field, enter the first effective date for the new address.

If you entered an end date for the previous address in step 1 above, use the day after as the new effective **From Date**.

5   Enter the address information in **Street Address**, **City**, **State or Province** and **ZIP or Postal Code.** Use the formatting outlined in "General Person Data Entry Standards" at http://www.is.mcgill.ca / minerva/Documentation/data_entry_standards.pdf.

– Specify the apartment number in the second address line.

– Enter the province code if known, or select it from the List of Values.

– For the **ZIP or Postal Code** field, the List of Values only includes postal codes for internal campus addresses.

6   In **Nation**, you can enter either:

– The country name. Banner will convert it to the correct country code when you <Tab> out of the field.

– The 3-digit country code, if known.

If the **Autohint** line advises you that Banner cannot find the specified country code, search for the correct code. With the cursor in **Nation,** click on .

7   In the **Telephone Type** field:

– If the number is an external one, enter 'REG' in **Telephone Type**, or click on in **Telephone Type** to select another type.

8   In the **Telephone** field:

– In the first box, enter only the 3-digit area code; in the second, the 7-digit phone number with no spaces or hyphens; in the third, the extension, if any.

– If the phone number is an international one, enter it in one of the **Street Lines.**

– You can only enter or view one phone number in GYAADDR. To view or add any other phone numbers for the person, select **Telephone - Employee (PPATELE)** in **Options** menu.

9   To enter emergency contact information, click the **Emergency Contact** tab and use the steps in .

How to update an address

You can overwrite an existing address to correct errors or update to a new address.

Note	For errors in personal and mailing addresses, you can overwrite the erroneous address. However, when a person has a *new* permanent or mailing address, you should use the steps in "How to add a new address".

1   Fill in the key block and click Next Block to view the address record.

2   Scroll through the list of addresses for the person to find the address type you need to correct.

3   Correct the information as required.

4   **Save**.

How to add emergency contact information

1 Access the GYAADDR form.

2 Click the **Emergency Contact** tab.

3 Enter the **Priority** in which the contact should be notified.

4 <Tab> to the next field, enter the contact's last name and <Tab> to the next field.

5 Continue in this fashion, adding first name and middle initial if known, the relationship to the employee or student and the contact's address.

Notes

• If the telephone number is international, enter it in one of the address fields; the **Telephone** field accommodates only North American phone formats.

• Do not change the default **Address Type** — 'EM' for Emergency.

6 **Save**.

7 To add more emergency contacts, click Insert Record and repeat steps 3 to 5, and **Save**.

Addresses GYAADDR [1.8] (TRAIN7)

ID: 777777123 ▼ Ms Easter A Henry   Addresses: ○ All   ◉ Current

Address | Emergency Contact

Priority: 1

Contact Last Name: Henry   First Name: Joseph   Middle Initial:
Relationship: P ▼ Parent

Address Type: EM Emergency Contact
Street Line 1: 456 Anywhere
Street Line 2:
Street Line 3:
City: Montreal
State or Province: QC ▼ Quebec
ZIP or Postal Code: H2V 4R5 ▼
Nation: 000 ▼ Canada
Telephone: 514 - 9326478 ▼

Last Update
User: DSMITH
Activity Date: 08-MAY-2007

Related forms and tasks

Use this form ...	To do this ...
Telephone Numbers (PPATELE)	View or enter more phone numbers associated with the person.
(E-mail Address) GOAEMAL	View or enter one or more email addresses for the person.
System Identification (GUASYST	Find out the person's relationship(s) to McGill; i.e. whether the person is or was a McGill student, faculty, alumni, employee, vendor, and so on.