

# MIDAS Application

## Steps to Create a Borrower Record

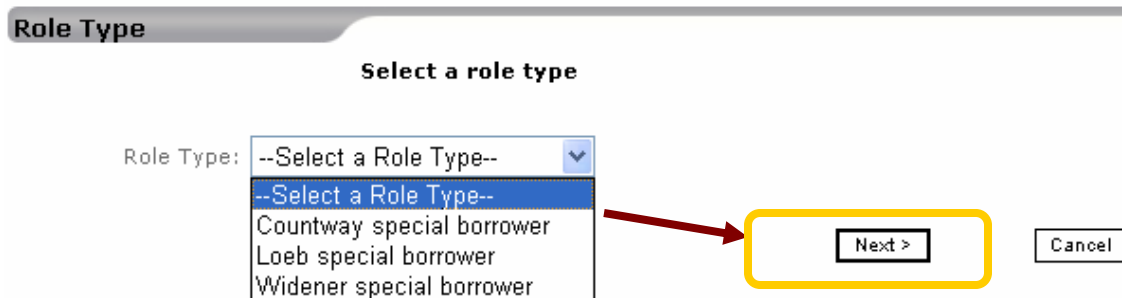
The following is a guideline for how to create a Library Borrower record within the MIDAS application. The wizard approach takes you through searching for the person to confirm whether he/she already has a HUID, entering pertinent data about the person, reviewing the data entered and saving the data.

1. Select Create Person in the top menu bar.



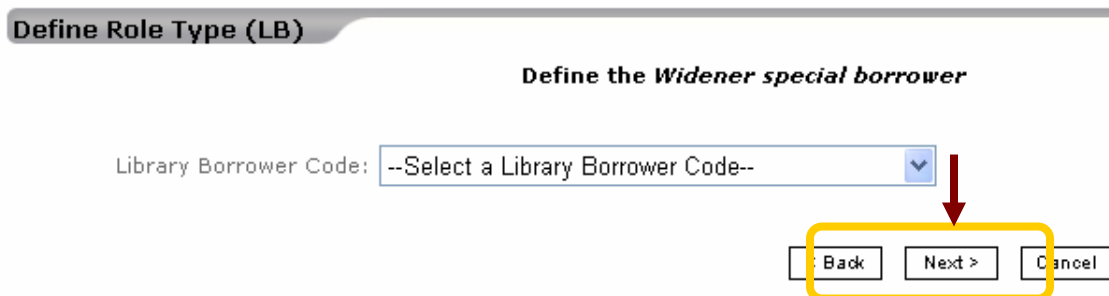
2. Select the appropriate role type. Select Next.

Create > Select a Role Type



3. Select the appropriate Special Borrower Code. Select Next.

Create > Select a Role Type > Define Role Type



4. Enter the Last & First Name & birth date and select to search. If a potential match is found a list will be presented. Examine the potential match's record to see if this person has a previously existing HUID.

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- If a potential match is the person → examine to see if the person needs a new HUID or the existing record can be updated.
- If a potential match is not the person → create a new record by selecting the [Create a different person](#) link. Go to step #5
- If a potential match is not found you will be presented with a form to begin filling in the person details. Go to step#5

**Create > Select a Role Type > Define Role Type > Search**

**Search**

**Confirm that the person is not already in the system**  
Required fields are marked with an asterisk (\*)

→ Last Name\*:

→ First Name\*:

Middle Name:

Prefix:

Suffix:

**and also provide:**

→ Birth Date:     
MM DD YYYY

**or**

SSN / ITIN:

5. Fill in as much of the person details as possible. Select Next.
  - Assign a new HUID from the manual list of available HUIDs maintained by your office.
  - The Last Name, First Name and Birth Date will be pre-populated based on the data provided on step #5.
  - If a mistake was made entering in the Last Name, First Name or Birth Date, cancel the create process and start from step#1.

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### Create > Person Details

#### Person Details

Complete some more information about *John Harvard*  
Required fields are marked with an asterisk (\*)

→ HUID\*:

Last Name\*:

First Name\*:

Middle Name:

Prefix:

Suffix:

Birth Date:     
MM DD YYYY

SSN / ITIN:

Gender:  Male  Female  Unknown

Email Address:

6. Fill in the start and end date. If the person's office or home address is known select Add Contact Data, go to step #7. If not known select Finish, skip to #9.

### Create > Person Details > Role Details

#### Library Role Details

Complete *Widener special borrower - Special Borrower - Alum* details for *John Harvard*  
Required fields are marked with an asterisk (\*)

→ Start Date\*:     
MM DD YYYY

→ End Date\*:     
MM DD YYYY

7. Fill in the address data. If the person's office or fax phone number is known select Add Phone, go to step #8. If not known select Finish, skip to #9.

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Create > Person Details > Role Details > Address

### Address

If known, complete address details for *John Harvard*  
Required fields are marked with an asterisk (\*)

→ Category\*: Office address

Address Mail Realm: Domestic

→ Address\*: Massachusetts Hall  
Office 123

→ City\*: Cambridge

State / Province: Massachusetts

Postal Code: 02184

→ Country\*: United States

< Back Add Phone Finish Cancel

8. Fill in the phone data. It is not critical that this is an office phone (for example, it may be a cell phone). Select Finish.

Create > Person Details > Role Details > Address > Directory Listing

### Directory Listing

If Known, complete Phone/Fax details for *John Harvard*  
Required fields are marked with an asterisk (\*)

→ Office Phone\*: 6175551111 Ext:

→ Location\*: Mass. Hall Set

Location ID:

Office Fax:

Listing Title: --Select A Listing Title--

Listing Status: --Select A Listing Status--

< Back Finish Cancel

9. MIDAS will present a screen to review all the data entered. If a mistake is found, select Back to correct it. If the data is correct, select Finish.
10. MIDAS will save the information and open the Detailed View of the person. From this page data changes can be made or other relevant data

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added. If the person is with you, you may want to print a PIN letter for him/her.

The screenshot shows the MIDAS application interface. At the top, there is a header with the MIDAS logo and the text 'Managing Identity Data & Affilia'. Below the header, there is a navigation bar with links for 'Search', 'Change Role', 'Create Person', and 'Help'. The user is logged in as 'Hope Joslyn' with the role 'POIBasicManager'. The current profile is 'John Harvard' with ID '01878787'. The record was created on '2007-09-20'. A 'Print PIN Letter' button is highlighted with a yellow box, and a red arrow points to it. Below the navigation bar, there is a 'Person' section with a 'No Image Available' placeholder. The left sidebar contains a menu with options like 'Update', 'Image', 'Id Card Enable / Disable', 'Add', 'Email', 'Directory Listing', 'Name', 'Address', and 'Role'.

### FAQ's

- MIDAS says a field is required and I do not have that data, how do I finish creating the record?
  - Without the required data, the process cannot be completed. You can cancel the process now and start over once you get the necessary data.
- MIDAS says that the Authorizer ID is invalid. Who can be an Authorizer?
  - Library policy dictates who may Authorize Research Assistants. MIDAS's functionality does **not** validate that the specific library's policy has been adhered to. MIDAS simply requires that a Borrower's authorizer has the following characteristics:
    - A HUID
    - A current role at the University
- I don't have address or phone data for the person, can I still create a record?
  - Yes, these are not required to complete creating a record. It is recommended that once the data is known to go back and add it to the person's record. This data helps facilitate other people affiliated with Harvard in contacting this person.
- I don't have the person's email address; can I still create a record?
  - Yes, email is not required to complete creating a record. As the PIN system and other University communications are highly reliant on persons having an Official email address it is highly recommended that an email address is added at the time of creation.
- What data do I need to know about the person to complete this process?

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### Steps to Create a Borrower Record

- First Name
- Last Name
- Birth Date or SSN
- Library Borrower Code
- Authorizer's HUID (required for some library borrower codes)
- Start Date
- End Date