

MIDAS Application

Steps to Create a Class Participant Record

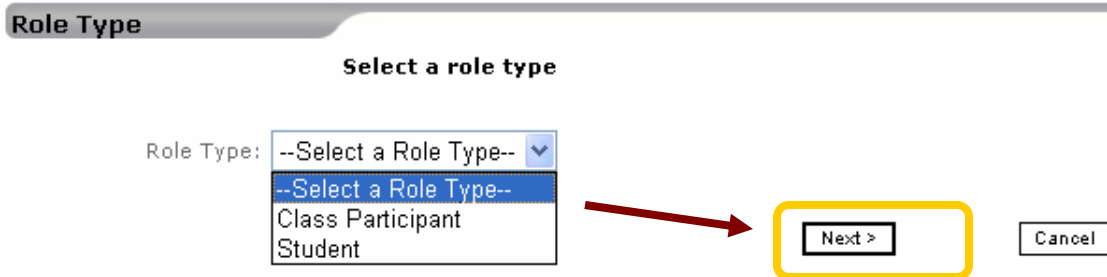
The following is a guideline for how to create a Class Participant record within the MIDAS application. The wizard approach takes you through searching for the person to confirm whether he/she already has a HUID, entering pertinent data about the person, reviewing the data entered and saving the data.

1. Select Create Person in the top menu bar.



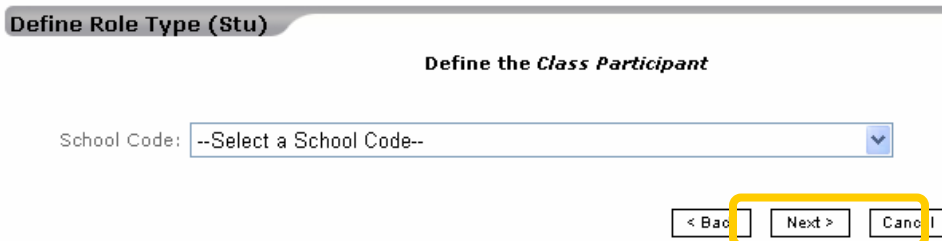
2. Select the appropriate role type. Select Next.

Create > Select a Role Type



3. Select the appropriate School. 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.
 - If a potential match is the person → update that record or add a new role.

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- 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.
 - The HUID will be pre-populated.
 - 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 (*)

HUDID*:

Last Name*:

First Name*:

Middle Name:

Prefix:

Suffix:

Birth Date:
MM DD YYYY

SSN / ITIN:

Gender: Male Female Unknown

Email Address:

6. Fill in as much of the role details as possible. The only appropriate student statuses for Class Participants are *Active class participant (A)* or *Inactive class participant (I)*. If the person's residence or mailing address is known select Add Contact Data, go to step #7. If not known select Finish, skip to #8.

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Create > Person Details > Role Details

Student Role

Complete *Class Participant - Graduate School of Design* details for *John Harvard*

Required fields are marked with an asterisk (*)

→ Status*: Active class participant (A) [v]
Department: No Department Specified {} [v]
Degree: No degree provided (XX) [v]
Program: No special program [v]
→ End Date: 06 07 2008
MM DD YYYY
Time Status: Unspecified [v]
Record House: No house [v]
Residence House: No house [v]
Board House: No house [v]
Boarding Status: On Board Not on Board

[< Back] [Add Contact Data] [Finish] [Cancel]

7. Fill in the address data. Select Finish.

Create > Person Details > Role Details > Address

Address

If known, complete address details for *John Harvard*

Required fields are marked with an asterisk (*)

→ Category*: Residence address [v]
Address Mail Realm: Domestic [v]
→ Address*: 11 Massachusetts Avenue
Apt 1
→ City*: Cambridge
State / Province: Massachusetts [v]
Postal Code: 02184
→ Country*: United States [v]

[< Back] [Finish] [Cancel]

8. 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.

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9. MIDAS will save the information and open the Detailed View of the person. From this page data changes, including FERPA status, can be made or other relevant data added.

The screenshot displays the MIDAS application interface. At the top, the MIDAS logo is visible, along with the tagline 'Managing Identity Data & Affiliations'. The user is logged in as Hope Joslyn, with the role of RegistrarAdvancedManager. The current profile is John Harvard (ID: 40750150), and the record was created on 2007-09-28. A 'Printer Friendly' icon is also present.

The interface includes a navigation menu with options: Search, Change Role, Create Person, Reports, and Help. A 'Collapse all' button is located near the top of the main content area.

The main content area is titled '- Person' and features a 'Person Detail' section. A placeholder for a profile picture shows 'No Image Available'. Below this, the 'Name' section is displayed in a table format:

Type	Last	First	Middle	Prefix	Suffix	Update
Official	Harvard	John				2007-

The 'Person Detail' section also includes the following information:

- National Id: [Blank]
- Gender: Male
- National Id Type: Birth Date: 1973-12-15
- National Id Update Date: [Blank]
- Gender/DOB Update Date: 2007-
- Ethnicity: [Blank]
- Persona Non Grata: N
- Student Special Status: [Blank]

FAQ's

- I see that the person already has a HUID that was assigned before. Should I create a new record or use his/her existing HUID?
 - You should use the existing HUID and add a new role.
- 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.
- I don't have address data for the person, can I still create a record?
 - Yes, address is 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.
- I know the person's personal email address, they haven't been assigned a Harvard email address yet, should I put the personal email in?

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- Yes, it can easily be changed later and there is no requirement that the email be in a Harvard domain.
- What data do I need to know about the person to complete this process?
 - First Name
 - Last Name
 - Birth Date or SSN
 - School
 - Role Type
 - Authorizer's HUID (required for most role types)
 - End Date
 - Student Status