

MIDAS Application

Steps to Create a POI Record

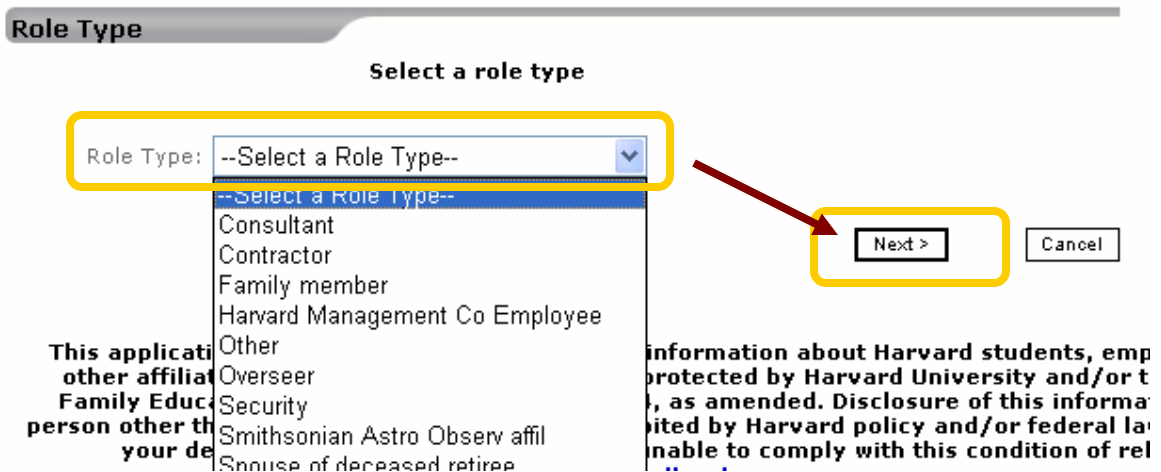
The following is a guideline for how to create a POI record within the MIDAS application. The wizard approach takes you through searching for the person to confirm whether he/she already has a HUID, entering pertinent data about the person, reviewing the data entered and saving the data.

1. Select Create Person in the top menu bar.



2. Select the appropriate role type. Select Next.

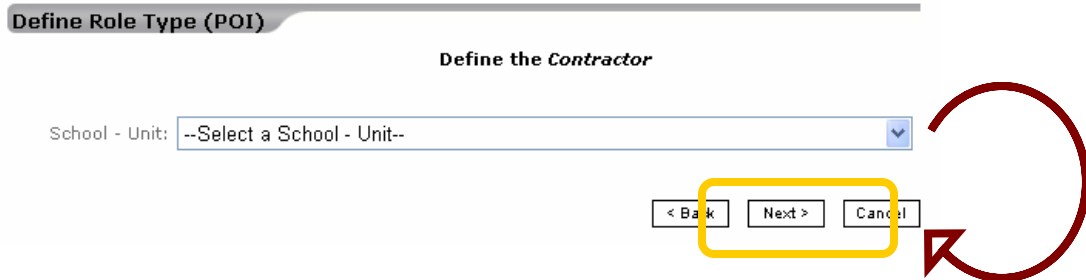
Create > Select a Role Type



The image shows a web form titled 'Select a role type'. At the top, it says 'Role Type' in a grey bar. Below that, the title 'Select a role type' is centered. There is a dropdown menu labeled 'Role Type:' with the text '--Select a Role Type--'. The dropdown is open, showing a list of role types: --Select a Role Type--, Consultant, Contractor, Family member, Harvard Management Co Employee, Other, Overseer, Security, Smithsonian Astro Observ affil, and Spouse of deceased retiree. To the right of the dropdown are two buttons: 'Next >' and 'Cancel'. The 'Next >' button is highlighted with a yellow box, and a red arrow points from the dropdown menu to it. There is also a red arrow pointing from the 'Next >' button to the right.

3. Select the appropriate School – Unit. Select Next.

Create > Select a Role Type > Define Role Type



The image shows a web form titled 'Define Role Type (POI)'. At the top, it says 'Define the Contractor' in a grey bar. Below that, the title 'Define the Contractor' is centered. There is a dropdown menu labeled 'School - Unit:' with the text '--Select a School - Unit--'. Below the dropdown are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a yellow box, and a red arrow points from the dropdown menu to it. There is also a red arrow pointing from the 'Next >' button to the right.

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 → update that record or add a new role.
- 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.
 - Depending on the type selected in step #4 MIDAS may have inserted a HUID. Else 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*: 01878787

Last Name*: Harvard

First Name*: John

Middle Name:

Prefix:

Suffix:

Birth Date:
MM DD YYYY

SSN / ITIN:

Gender: Male Female Unknown

Email Address: john@harvard.edu

Next >

Cancel

6. Fill in as much of the role details as possible. 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

POI Role

Complete *Contractor - University Information Systems* details for *John Harvard*
Required fields are marked with an asterisk (*)

Company: Super Contracting Co

ID Line 1: Contractor

ID Line 2:

→ Authorizer's HUID*: 50662071

→ Start Date*:
MM DD YYYY

→ End Date*:
MM DD YYYY

< Back

Add Contact Data

Finish

Cancel

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7. Fill in the address data. Office data is preferred especially if the person will be located on campus. 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.

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) though note that it may be presented as this in directories etc. 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

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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 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 '2007-09-21'. A yellow box highlights the 'Print PIN Letter' button, with a red arrow pointing to it from the text above. Below the navigation bar, there is a sidebar with 'Update' and 'Add' sections. The 'Update' section includes 'Image', 'Id Card Enable / Disable', 'Email', 'Directory Listing', 'Name', 'Address', and 'Role'. The 'Add' section includes 'Image', 'Email', 'Directory Listing', 'Name', 'Address', and 'Role'. The main content area shows a 'Person' profile with a 'No Image Available' placeholder. A 'Collapse all' button is visible in the top right of the main content area.

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?
 - If the person's existing POI role is current (term dates include today):
 - And the person is at any school / unit except HBS or Longwood (HMS or SPH) and needs access to any school / unit except HBS or Longwood, you should use the existing record and add a new role.
 - And the person is at HBS and needs access to Longwood (HMS or SPH) or any other school / unit, create a new record.
 - And the person is at Longwood (HMS or SPH) and needs access to HBS or any other school / unit, create a new record.
 - And the person is at any school / unit but HBS or Longwood (HMS or SPH) and needs access to the same area (HBS or Longwood), use the existing record and add a new role. If the authorizer is the same as the existing role you can simply review the role dates and update if necessary.
 - If the person's existing role is not current:

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- And the person was at any school / unit except HBS or Longwood (HMS or SPH) and needs access to any school / unit except HBS or Longwood, you should use the existing record and update the previous role.
- And the person was at HBS and needs access to Longwood (HMS or SPH) or any other school / unit, create a new record.
- And the person was at Longwood (HMS or SPH) and needs access to HBS or any other school / unit, create a new record.
- And the person was at any school / unit but HBS or Longwood (HMS or SPH) and needs access to the same area HBS or Longwood, use the existing record and update the existing role.

Below is a chart to demonstrate the above:

<i>Existing Role Term</i>	<i>Existing Role School - Unit</i>	<i>Desired Role School - Unit</i>	<i>Is Authorizer the same?</i>	<i>Update Existing Role</i>	<i>Add New Role</i>	<i>Create New Record</i>
Includes Today	HBS	HBS	Y	Y	N	N
			N	N	Y	N
		Longwood (HMS or SPH)	n/a	N	N	Y
		Not HBS, HMS or SPH	n/a	N	N	Y
	Longwood (HMS or SPH)	HBS	n/a	N	N	Y
			Y	Y	N	N
		Longwood (HMS or SPH)	N	N	Y	N
		Not HBS, HMS or SPH	n/a	N	N	Y
	Not HBS, HMS or SPH	HBS	n/a	N	N	Y
			n/a	N	N	Y
		Longwood (HMS or SPH)	Y	Y	N	N
			N	N	Y	N
Does not include today	HBS	HBS	n/a	Y	N	N
			n/a	N	N	Y
		Longwood (HMS or SPH)	n/a	N	N	Y
		Not HBS, HMS or SPH	n/a	N	N	Y
	Longwood (HMS or SPH)	HBS	n/a	N	N	Y
			n/a	Y	N	N
		Longwood (HMS or SPH)	n/a	N	N	Y
		Not HBS, HMS or SPH	n/a	N	N	Y
	Not HBS, HMS or SPH	HBS	n/a	N	N	Y
			n/a	N	N	Y
		Longwood (HMS or SPH)	n/a	Y	N	N
			n/a	N	N	Y

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- 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?
 - A POI authorizer must have the following characteristics:
 - Have a HUID
 - Have an Official Email Address
 - Be a current employee
 - Have an active employment status (A, L, P, S)
 - Be paid
 - Be in one of the following employment classes:
 - A – Admin & Professional
 - F- Senior Faculty
 - G – Graduate Student
 - I – TAs, Other Staff
 - J – Junior Faculty
 - N – External Post Docs NHR
 - O – Other Faculty
 - Y – Internal Post Docs
 - Z – Ext Post Docs Harvard Research
- 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.
- 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?
 - 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 – Unit

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- Role Type
- Authorizer's HUID (required for most role types)
- Start Date
- End Date