



Quick Guide to Creating a Library Borrower

The following instructions describe the steps you'll need to take in order to create a Library Borrower record in the IAM Identity Registry. Before you create a new identity, first validate that the person you are assisting is not already in Harvard's identity registry. If the person does not already have a record, follow the steps below to enter pertinent data about the person, review the data you've entered, and create a new Library Borrower. If the person already exists in the registry, simply add a new Library Borrower role. See the end of this document for frequently asked questions — and if you need additional help, please email IThelp@harvard.edu.

1. First Steps

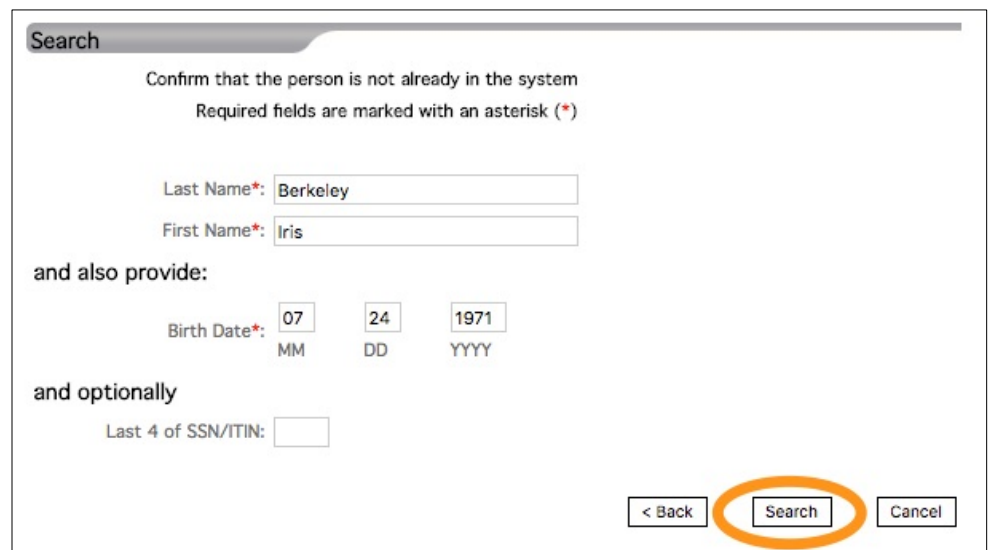
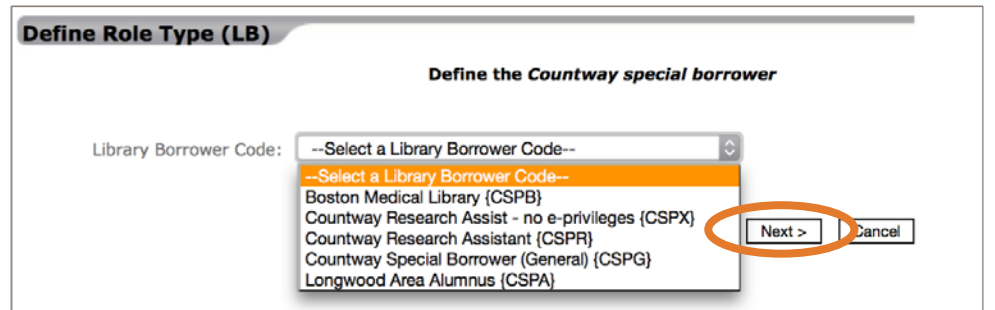
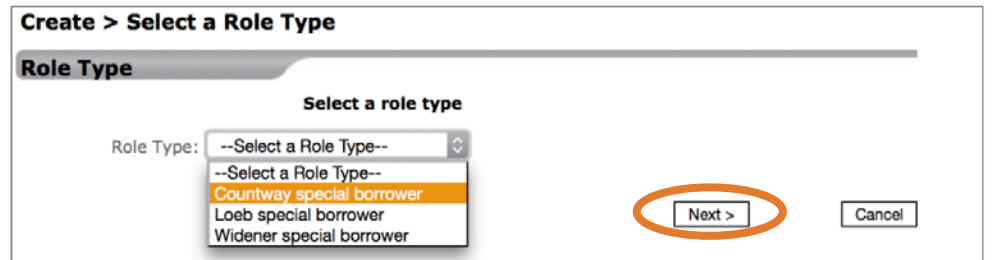
- First, log into MIDAS and choose your role type (usually *LB Basic Manager*).
- Then, select **Create Person** in the top menu bar

2. Select Library Type & Code

- In the Select a Role Type screen, select the appropriate **Library Borrower** role type and click the **Next** button.
- Then, select the appropriate **Library Borrower Code** and click the **Next** button.
- *Important: If you are creating a Library Borrower - Research Assistant, please view the "Quick Guide to Creating a Library Borrower – Research Assistant".*

3. Search for Duplicate Identities

- Verify that the person does not already exist in the registry by searching for possible matches. Enter the last name, first name, birth date and optionally, the last four digits of their SSN/ITIN, and click the **Search** button.



- If possible matches are found, MIDAS will list them and the **Match Rank** of each. An exact match is shown at the top and partial matches are displayed according to their Match Rank, low to high. The lower the ranking, the better possibility the identity listed is a match. See the “Match Rank Explained” section below.
- Select the HUID of each potential match listed, based on their match rank, to display the current profile of the identity.
- Carefully examine the current profile of the potential match to determine if the person’s identity already exists in the registry.

Results for First name: Iris; Last name: Berkeley; Birth date: 1971-07-24;

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FERPA	HUID	Official Name	Listing Name	Birthdate	Match Rank
	51340116	Berkeley, Iris Class Participant - Harvard College		24-Jul	5
	31340128	Berkeley, Ashley Contractor - Faculty of Arts and Sciences		24-Jul	6
	51340221	Johnson, Iris Student - Graduate School of Business Administration		24-Jul	7
	61340106	Berkeley, Irishan Collaborator - Alumni Affairs and Development		21-Jul	16
	81340110	Berkeley, Iristine Widener Special Borrower - Special Borrower		04-Aug	16

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Select HUID to examine the current profile

Refine search New search

Refine search New search

Create a different person

- If you determine that the potential match is indeed the same person you are intending to create, then do not create a new identity. Instead, simply update the existing identity by selecting **Add > Role** from the left menu on the current profile page. See the FAQs at the end of this guide for more information.
- If you determine that the potential match it is not the person you are intending to create, then select the “**Back to Results**” link at the top or bottom of the current profile page to get back to the list of potential matches.
- If you determine that none of the possible matches listed are the person you are intending to create, then proceed to create a new identity by selecting the **Create a different person** link. Proceed to Step 4.
- If your search finds no possible matches, then you are presented with the person information you entered. Check to make sure all the information is correct. If it is correct, click the **OK** button to create a new identity in the registry for this person. Proceed to Step 4.

A person was not found which matches the criteria entered. Select OK to create a new person with this information, or select Cancel to exit without creating the new person record. Additional person data can be entered after selecting OK.

Name:Iris Berkeley
Birth Date:1971-07-24
Last 4 SSN/ITIN:

OK Cancel

Match Rank Explained:

- Only the first three characters of the first name are used in the match-rank calculation. For example, if the MIDAS user enters “Samantha”, then the search will consider Samantha, Sam, Sammy and Samuel to be a first name match in the calculation of the match-rank number.
- **Exact:** An exact match-rank is when all of the person’s information entered matched an identity in the registry; including the first name (first 3 characters), last name, birth date, *and* last four digits of their SSN/ITIN.
Note: If SSN/ITIN was not entered and everything else matched exactly, then the match-rank number is calculated as 5. This is the most common case.
- **Match Rank 1 through 7:** A strong possible match where the person’s information entered matched on the first name (first 3 characters) and/or last name; also matched on the birth date; and the last four digits of SSN/ITIN either matched, was not entered, or does not exist in the registry for the possible match listed.
- **Match Rank 8 through 12:** A possible match where the person’s information entered matched on the first name (first 3 characters) and/or last name; and also matched on the last four digits of the SSN/ITIN entered; but did not match on the birth date.

- **Match Rank 13 through 16:** A weaker possible match where the person’s information entered matched on the first name (first 3 characters); and also matched on the birth date; but *did not* match on the last four digits of the SSN/ITIN entered. If the last name matched then the ranking will be higher in this category.

OR

The person’s information entered matched on the first name (first 3 characters) *and* last name; but did not match on the birth date; and the last four digits of the SSN/ITIN was not entered.

- **No Matches Found:** The search will not find any potential matches when *both* the first name (first 3 characters) and the last name of the person’s information entered does not match any identities in the registry, even though the birth date and last four digits of the SSN/ITIN (if entered) may match identities in the registry.

OR

When *only one* element of the person’s information entered (first 3 characters of the first name, last name, birth date, or last 4 digits of SSN/ITIN) matches identities in the registry.

4. Create the New Identity

- Fill in as many of the person details as possible. Note that MIDAS automatically generates and inserts a Harvard ID (**HUID**) in this screen.
- Be sure to enter an **Onboard Email Address** so that this Special Library Borrower will be able to claim a HarvardKey.
- When you are finished, click the **Next** button.
- The person’s last name, first name, birth date and optional last 4 digits of their SSN/ITIN is prepopulated from the information you entered earlier. If you need to change this information, cancel the creation process and start again from the beginning.

Important: If you cancel the create person process at this point you will be generating a duplicate HUID. Please email iam_help@harvard.edu stating that a duplicate ID was generated in error, and include the incorrect HUID. If you did not take note of the HUID then please provide the last name, first name, and birthdate used to create the incorrect identity, as well as the date when it was created

- Fill in the start and end dates. The start date defaults to today’s date, and the end date defaults to one year from today, but both can be changed.
- If you know the person’s address or phone number, click **Add Contact Data**. Add all known contact data to create the most complete identity record. Otherwise, click **Next** and skip to Step 5.

Person Details

Complete some more information about *Iris Berkeley*
Required fields are marked with an asterisk (*)

HUID*: **02899349**

Last Name*: **Berkeley**

First Name*: **Iris**

Middle Name:

Prefix:

Suffix:

Birth Date*: **1971-07-24** (YYYY-MM-DD)

Last 4 of SSN/ITIN:

Gender: Male Female Unknown

Onboard Email Address:

Official Email Address:

Library Role Details

Complete *Countway Special Borrower - Boston Medical Library* details for *rester tester*
Required fields are marked with an asterisk (*)

Start Date*:
MM DD YYYY

End Date*:
MM DD YYYY

- Fill in the address data. Office data is preferred, especially if the person will be located on campus. When entering address data on this screen you must include values for **Category** (residence, office, etc.), **Street Address**, **City**, **State/Province**, **Postal Code** and **Country**. Selecting a value for **Address Mail Realm** is optional, but helps create appropriate mailing distributions.
- If you don't know the person's address, then leave the fields blank.
- If you know any phone or fax numbers for the person, click **Add Phone**; otherwise, click **Next** and skip to Step 5.
- Fill in the phone data. The phone number listed under **Office Phone** may be for any preferred phone (i.e. office desk phone or cell phone), but it must also be assigned a **Location**. To assign a location, click **Set**, and then search and select their office address.
 Note that the number supplied will be used in University directory listings and display on Harvard Phone consoles. Directory listing title and status may also be assigned from this screen. When you are done, click the **Next** button.

Address

If known, complete address details for *Iris Berkeley*
 Required fields are marked with an asterisk (*)

Category*: Office address

Address Mail Realm: University Mail

Address*: 8 Story Street
 Sixth Floor

City*: Cambridge

State/Province*: Massachusetts

Postal Code*: 02138

Country*: United States

< Back Add Phone Next > Cancel

Directory Listing

If Known, complete Phone/Fax details for *Iris Berkeley*
 Required fields are marked with an asterisk (*)

Office Phone*: 617-495-7777 Ext:

Location*: 8 Story St. **Set**

Location ID:

Office Fax:

Listing Title: Adj Prof

Listing Status: --Select A Listing Status--

< Back Next > Cancel

5. Review the Record

- MIDAS will present a screen displaying all the data that you have entered. Please review the information carefully.
- If you find any mistakes, click **Back** to go back and correct them. If the data displayed is all correct, click the **Finish** button.
- Creation of the Library Borrower role is now complete. MIDAS will save the new identity and display its Detailed View. From this profile view, you may make changes to existing data or add new data to the identity.

Person Detail

HUID*: 02899349

Last Name*: Berkeley

First Name*: Iris

Middle Name: Claire

Prefix:

Suffix:

Birth Date: 1971-07-24 (YYYY-MM-DD)

SSN / ITIN:

Gender: Female

Official Email Address: iris_berkeley@harvard.edu

Onboard Email Address: -----

LB Role

Title: Countway special borrower

Type: Countway special borrower

Borrower Type: CSPB - Boston Medical Library

* Start Date: 2015-09-22

* End Date: 2016-09-22

Address

Category*: Office address

Address*: 8 Story Street
 Sixth Floor

City*: Cambridge

State / Province: MA

Postal Code: 02138

Country*: United States

Directory Listing

Office Phone*: 6174957777 Ext:

Location*: 8 Story St.

Location ID:

Office Fax:

Listing Title: Adj Prof

Listing Status:

< Back Finish Cancel

Frequently Asked Questions

Why is it important to confirm that an identity does not already exist in MIDAS?

There are more than a million identities in Harvard's registry. When an identity already exists in the registry, making changes to that record rather than creating a new one stays true to Harvard's "one identity for life" paradigm and makes it possible for that person to keep the same Harvard ID (HUID) through their entire Harvard lifecycle — meaning a consistent experience with access to buildings and parking, authentication systems, and other systems at Harvard that require authentication, including Crimson Cash and other card-associated services.

The person I am assisting already has a HUID. Should I use it, or create a new record?

Do not create a new record. Instead, you should add a new Library Borrower role to the existing HUID.

MIDAS says a field is required, but I do not have that data. How do I finish creating a record?

The creation of a record cannot be completed without the required data. However, you can cancel the process and start over once you have the necessary data available.

Can I still create a record if I don't have the person's address or phone number?

Yes. Address and phone number are not required to complete the creation of a record; however, it is recommended to add this information to a person's record once it is known, because it helps other MIDAS users in the future contact the person if necessary.

Can I still create a record if I don't have the person's email address?

Yes, but an Onboard Email is required for him or her to claim a HarvardKey, which must be done in order to access Harvard systems.

What data do I need to know about the person to complete a Library Borrower record?

In order to complete the creation of a Library Borrower record, you will need the following information: First name, Last name, Birth date, Library Borrower code, Role Start date and Role End date. Last four digits of Social Security Number is optional.

What if I have a question that isn't answered here?

Extensive information is available in MIDAS in-app help by clicking Help in the menu bar at the top of the screen. If you still need additional assistance, feel free to email IThep@harvard.edu.