



Quick Guide to Creating a Library Borrower – Research Assistant

The following instructions describe the steps you'll need to take in order to create a Research Assistant 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 – Research Assistant. See the end of this document for frequently asked questions — and if you need additional help, please email IThelp@harvard.edu.

Before You Begin

In order to create a Library Borrower – Research Assistant's role for an individual, you'll need to know that person's **first and last names**, **birth date**, **Library type**, **Borrower code**, **role start/end dates** and optionally the last 4 digits of their SSN/ITIN. You'll also need a valid **authorizer's HUID**. Please gather this info before you begin.

1. First Steps

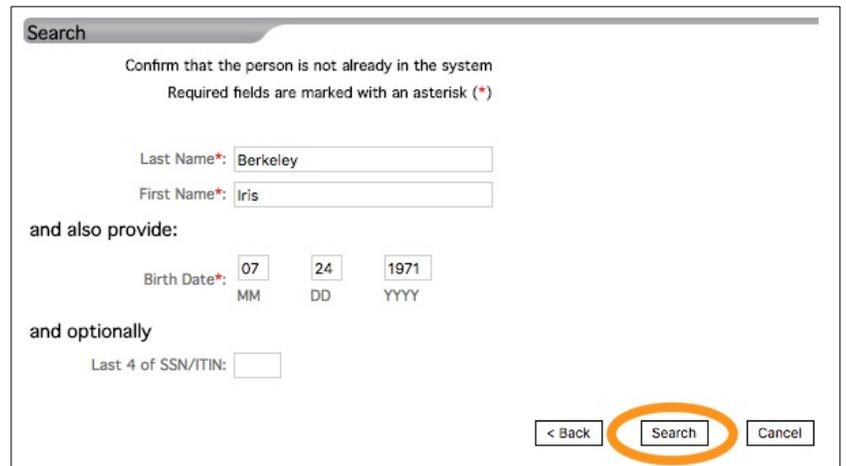
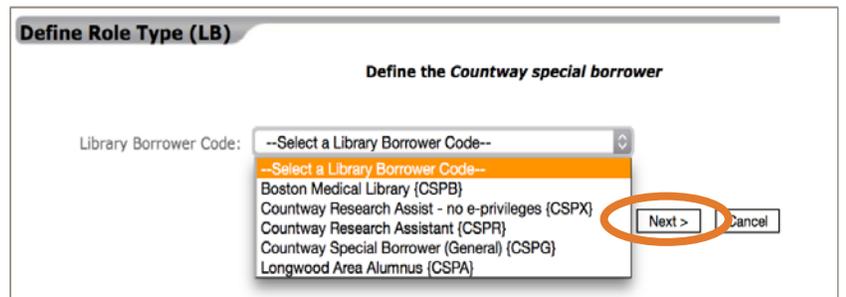
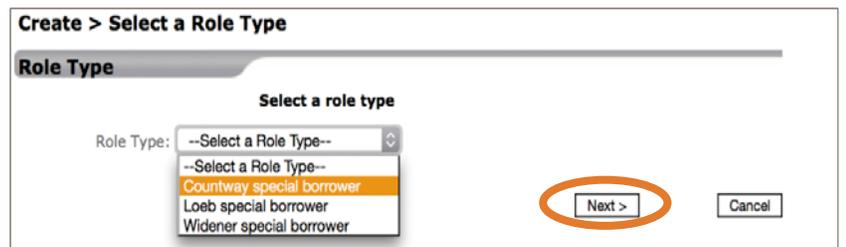
- First, log into MIDAS and choose your role type (usually *LB Basic Manager*).
- Then, select **Create Person** in the top menu bar.

2. Select Library Type & Code

- In the Select a Role Type screen, select the appropriate Library Borrower role type and click the **Next** button. Note: As of now, only Widener Library and Countway Library has Research Assistant Library Borrowers.
- Then, select the appropriate Library Borrower Code for a Research Assistant and click the **Next** button.
- *Important:* If you are creating a Library Borrower other than a Research Assistant, please view the "Quick Guide to Creating a Library Borrower".

3. Search for Duplicate Identities

- Verify that the person does not already have a Research Assistant Library Borrower record 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 display the record(s). Select each HUID to examine the current profile of each to determine if the person you are assisting already has a Research Assistant Library Borrower record in the registry.
 - a. If a possible match is indeed the same person, and if the authorizer is the same, simply update the dates of their existing Research Assistant Library Borrower role.
 - b. If a possible match is not the same person, or the authorizer is different, create a new Research Assistant record by selecting the **Create a different person** link.



c. If your search returns no matches, you will automatically be directed to the next screen to enter the person’s details for a new Research Assistant record.

4. Create the New Record

- 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, select the **Cancel** button and start again from the beginning.
- Enter an 8-digit Harvard ID (HUID) that is within the number range for the Library Type selected.
 - o Widener Library Range: 020000000 - 02174999
 - o Countway Library Range: 028000000 – 028999999
 Note that HUIDs must be unique so if someone already has a Library Borrower role using that HUID you will be given an error message and need to enter another number.
- Fill in as many of the person details as possible.
- Be sure to enter an **Onboard Email Address** so that this Library Research Assistant will be able to claim a HarvardKey, even if they have already claimed a HarvardKey on another HUID.
- When you are finished, click the **Next** button.
- Fill in the authorizer’s Harvard ID, which is usually the individual this person is assisting in their research.
- 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.

- 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 category blank.
- If you know any phone or fax numbers for the person, click **Add Phone**; 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*: 0214456;

Last Name*: Berkeley

First Name*: Iris

Middle Name: Claire

Prefix: Ms

Suffix:

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

Last 4 of SSN/ITIN:

Gender: Male Female Unknown

Onboard Email Address: Irisclaireberkeley@gmail.com

Official Email Address: Iris_berkeley@harvard.edu

Next > Cancel

Library RA Role Details

Complete *Widener Special Borrower - Research Assistant* details for *Iris Berkeley*
 Required fields are marked with an asterisk (*)

Authorizer's HUID*: ██████████

Start Date*: 02 10 2017
 MM DD YYYY

End Date*: 02 10 2018
 MM DD YYYY

< Back Add Contact Data Next > Cancel

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

- Fill in the phone data. The 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 **Next**.

Directory Listing

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

Office Phone*: Ext:

Location*: Set

Location ID:

Office Fax:

Listing Title:

Listing Status:

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 Research Assistant Library Borrower role is now complete.

MIDAS will save the record and display its Detailed View. From this profile view, you may make changes to existing data or add new data.

Person Detail

HUID*: 02144567

Last Name*: Berkeley

First Name*: Iris

Middle Name: Claire

Prefix: Ms

Suffix:

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

Last 4 of SSN/ITIN:

Gender: Female

Onboard Email Address: irisclaireberkeley@gmail.com

Official Email Address: iris_berkeley@harvard.edu

Library Role

Title: Widener Special Borrower [REDACTED]

Library Borrower Type: Widener Special Borrower

Library Borrower Code: OFFI - Research Assistant

Authorizer's HUID: [REDACTED]

Authorizer Name: [REDACTED]

Start Date: 2017-02-10

End Date: 2018-02-10

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:

Listing Status:

Frequently Asked Questions

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

If the person has a prior Research Assistant Library Borrower record and the authorizer is the same, you may use that HUID and simply update the role start/end dates. Otherwise, you should create a new Research Assistant Library Borrower record for the person.

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.

MIDAS says the Authorizer ID is invalid. Who can be an authorizer?

Library policy dictates who may authorize research assistance; however, MIDAS functionality does *not* validate that a specific library's policy has been adhered to. MIDAS simply requires that a Borrower's authorizer have a HUID and a current role at the University.

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 if the person already has a HarvardKey?

Research Assistants are required to have a unique HarvardKey for their Research Assistant Library Borrower roles in order to access Harvard Library systems related to their research role.

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 IThelp@harvard.edu.