

## Adding a UNI Patron to the System

**Purpose:** To add a UNI Patron to the system, you must:

- Create a personal information record for that patron, including bio-demographic information
- Assign an affiliation to the patron

When adding a patron, the system will run **Search/Match** to determine if a record already exists for that individual. If a record already exists, you may simply assign the affiliation. Do not create another record if the record already exists, this results in duplicate records.

Step	Action							
1.	<ul> <li>Navigate to the Add/Update a Person page. Select Main Menu &gt; UNI Cus Campus Community &gt; Patron Affiliates</li> </ul>							
	Favorites Main Menu > UNI Custom > Campus Community > Patron Affiliates							
	UNI Patrons Affiliates							
	Eind an Existing Value Add a New Value							
	ID: NEW							
	Add							
	<i>Note:</i> If you know the individual already exists (you have their U-ID), click the <b>Find an Existing Value</b> tab to search for the individual. Skip to step 4.							
2.	Click the Add button on the Add a New Value tab.							
	<i>Result:</i> The Bio-Demographic tab displays.							



Step	Action							
3.	On the <i>Bio-Demographic</i> tab, complete the following:							
	Bio-Demographic Affliations							
University of University of Northern Iowa Patrons								
	EmpIID NEW SSN: Date of Birth							
	Name Find   View All First I of 1 D Last							
	Type of Name PRI Effective Date 07/20/2011 Status Active							
	First Name Middle Name Last Name							
	Gender / Marital Status Find   View All First 💶 1 of 1 🕨 Last							
	Effective Date 07/20/2011 *Gender Unknown - *Marital Status Unknown -							
	Address Find   View All First 4 1 of 1 Last							
	Address Type PERM Effective Date 07/20/2011							
	Line 1							
	Line 2							
	Postal Code County							
	Country USA							
	• <b>SSN</b> – This field is not required. If you have the Patron's social security number, enter it here. <i>Note:</i> This number will not display once entered. It							
	becomes masked.							
	• <b>Date of Birth</b> – Required field.							
	• First Name – Required field.							
	• Middle Name – Optional field.							
	• Last Name - Required field.							
	• <b>Gender</b> – Optional field.							
	• Marital Status – Option field.							
	• Address – Required fields.							



Step	Action						
4.	Click the <i>Affiliations</i> tab.						
	Complete the following:						
	Bio-Demographic Affliations						
	University of Patron Affiliations						
	EmpliD NEW						
	Affiliations						
	*Affiliation Code						
	*Start Date 07/20/2011 1 End Date 1 *Affiliation Status Active						
	• Affiliation Co	do Entero	r salact as a	nnronrista (a	a DI IB. Datron	Library)	
	Start Data	equired field	d Defaults	to today's da	g. I LID. I autoli te may be undat	- Liurary)	
	• Find Date Of	ntional field	If no end of	lote is entered	the patron affi	liation	
	<ul> <li>End Date = 0</li> <li>continues index</li> </ul>	finitely				mation	
5	Click the Save but	ton					
Э.	Click the save but	lon.					
	<i>Result:</i> The system performs the Search/Match process and returns any possible matches that already exist in the system.						
	Search Results						
	WARNING: Potential duplica	tes were found . thi	s person may alrea	dv exist in the datab	350.		
	Refer to the list below for pos	sible matches to the	e person you are ad	lding. kad whathar you waat	10		
	continue adding this new pe	rson, or cancel this of	operation.	ked whether you want			
	Match Criteria      Search Results Summar	,					
	Search Results	,		Customize   F	ind   View All	1-5 of 5 Last	
	Results Results2 Ad	ditional Information	<u> </u>				
	EmpliD	First Name	Middle Name	Last Name	National ID D	ate of Birth	
	1 Carry ID ######	James	E	Smith	9999		
	2 Carry ID ######	Jasmine	Faith	Smith			
	3 Carry ID ######	James	J	Smith	*****9999		
	4 Carry ID ######	James	0	Smith	9999		
	5 Carry ID ######	James	Otto	Smith			
	Deturn						
	Keturn						
6.	Use the Show All	Columns bu	itton to view	v more details	for the possible	e matches.	



Step	Action						
7.	Important! Review the possible matches closely before taking action.						
	If	Then					
	a match exists	<ul> <li>Click the Carry ID button next to the record and then click the Return button.</li> <li>Assign the Affiliation (Click the <i>Affiliations</i> tab, select the appropriate Affiliation Code, enter date parameters if applicable, and click the Save button.)</li> </ul>					
	a match does not exist	<ul> <li>Click the <b>Return</b> button. Click the <b>OK</b> button.</li> <li>The system has now assigned a U-ID for the patron</li> <li>Assign the Affiliation (Click the <i>Affiliations</i> tab, select the appropriate <b>Affiliation Code</b>, enter date parameters if applicable, and click the <b>Save</b> button.)</li> </ul>					
8.	Click the Save button.						

## **Viewing Patron Affiliations**

Main Menu > Campus Community > Affiliations > Verw Person Affiliations

Favorites Mai	n Menu > Campus	Community >	Affiliations >	View Person Af	filiations			
								6
Tabular View Hierarchical View								
Pam Panther Patron #######								
*Institution: University of Northern Iowa								
Relations to	Relations to Institutions Customize   Find   💷   🔠 First 🗷 1 of 1 💌 Last					1 of 1 Last		
Affiliations	Affiliations Details TTT							
Affiliation Code	Description	Start Date	End Date	Affiliation Status	Descriptor	Affiliation Ranking	Hierarchy level	View Details
PLIB	Patron - Library	08/01/2011		Active			2	View Details

Return to Search

Tabular View | Hierarchical View