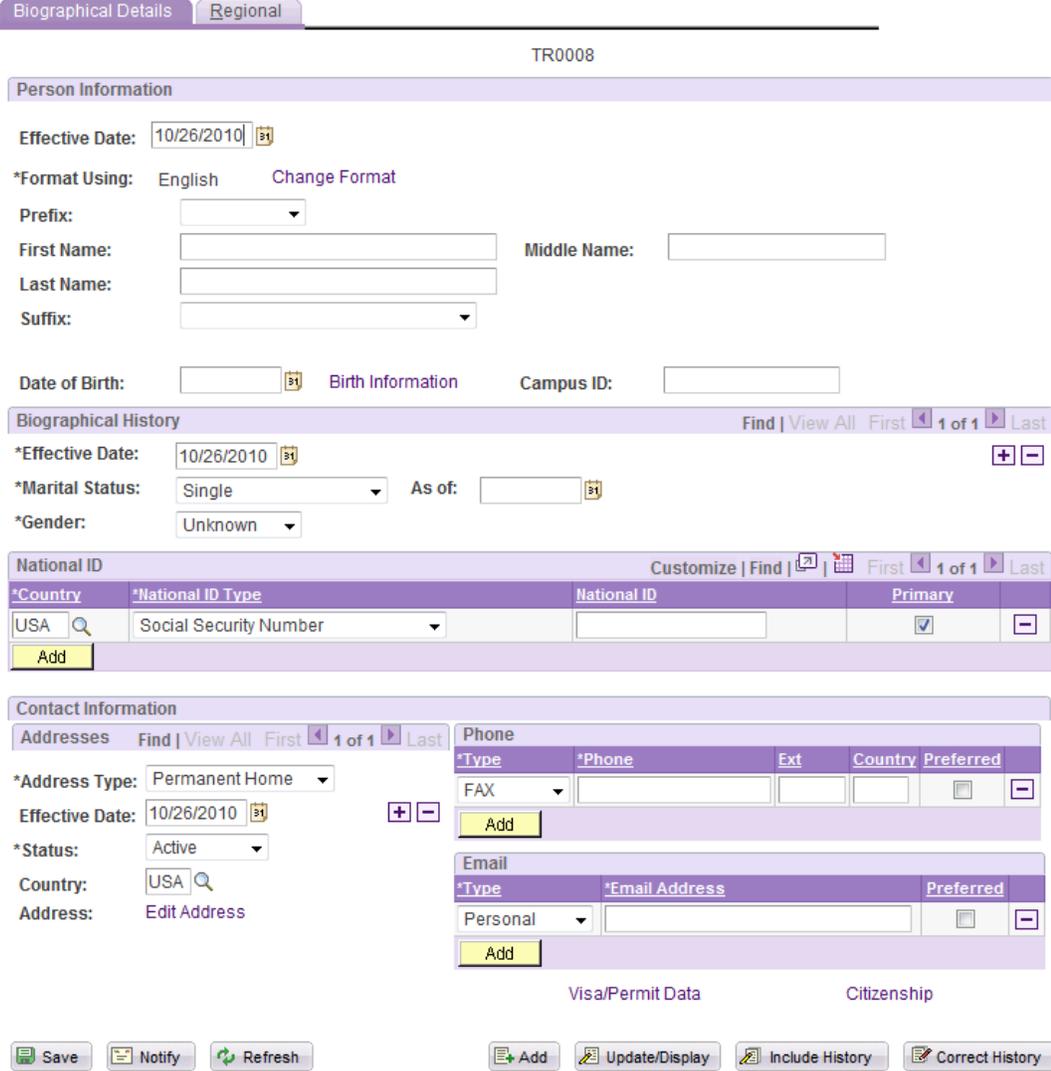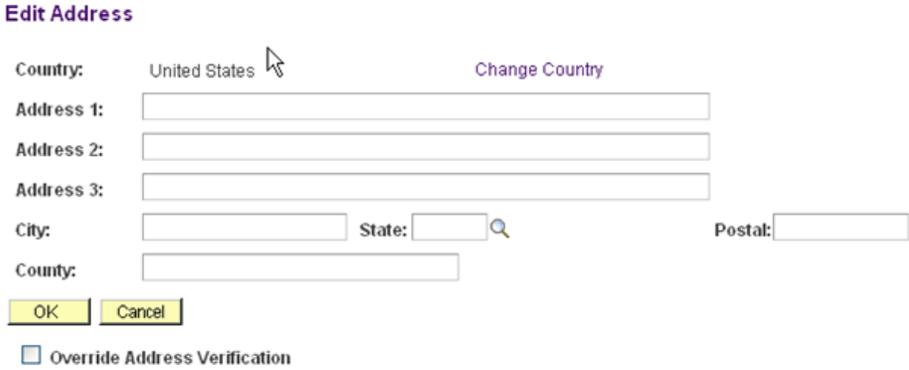University of
NorthernIowa

## Adding an Individual to the System

Purpose: To add an individual to the system, you must create a personal information record for that individual. Before adding an individual, run **Search/Match** to determine if a record already exists for that individual.

Step	Action
1.	Navigate to the **Add/Update a Person** page. Select **Main Menu › Campus Community › Personal Information › Add/Update a Person** Favorites | Main Menu > Campus Community > Personal Information > Add/Update a Person **Add/Update a Person** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value | Add a New Value Maximum number of rows to return (up to 300): 300 ID: begins with Campus ID: begins with National ID: begins with Last Name: begins with First Name: begins with ☐ Include History ☐ Correct History ☐ Case Sensitive Search Clear Basic Search Save Search Criteria
2.	Click the **Add a New Value** tab. **Add/Update a Person** Find an Existing Value | Add a New Value ID: NEW Add
3.	When adding a new person to the database, the system requests a person ID. You can assign IDs in one of two ways: • **Automatically:** If you use automatic ID assignment, the system adds IDs sequentially as you add new people. The system maintains the last assigned ID on the **Installation Table - Last ID Assigned** page. • **Manually:** You enter the IDs, using any system that you choose for the organization. With manual entry, you don't need to assign IDs sequentially. Assigning IDs manually is the only way that you can include alphabetical characters in the IDs.

UNIVERSITY OF NorthernIowa

| Step	Action
4.	**NOTE:** In this example we are adding an ID manually, so we enter the ID number (TR0008) in the ID field prior to clicking the **Add** button. Click the **Add** button. Add
5.	Use the **Biographical Details** page to enter an individual's name and other basic biographical data as appropriate. Biographical Details Regional TR0008 **Person Information** Effective Date: 10/26/2010 *Format Using: English Change Format Prefix: First Name: Middle Name: Last Name: Suffix: Date of Birth: Birth Information Campus ID: **Biographical History** Find	View All First ◄ 1 of 1 ► Last *Effective Date: 10/26/2010 ＋ － *Marital Status: Single As of: *Gender: Unknown **National ID** Customize	Find	🔲	🖼 First ◄ 1 of 1 ► Last *Country	*National ID Type	National ID	Primary USA 🔍	Social Security Number		☑	－ Add **Contact Information** **Addresses** Find	View All First ◄ 1 of 1 ► Last **Phone** *Type	*Phone	Ext	Country	Preferred *Address Type: Permanent Home FAX				☐	－ Effective Date: 10/26/2010 ＋ － Add *Status: Active Country: USA 🔍 **Email** Address: Edit Address *Type	*Email Address	Preferred Personal		☐	－ Add Visa/Permit Data Citizenship 💾 Save 📋 Notify 🔄 Refresh 📥 Add 📄 Update/Display 📑 Include History 📝 Correct History

Step	Action
6.	Complete the following (at a minimum, First Name, Last Name, Phone, Email): • **Effective Date** – Defaults to today's date. Update as appropriate. *Note:* The effective date in the Biographical History should not be changed; the Add Row "+" button is used to create a new effective dated row that will contain the updated information. • **Prefix** – Select as appropriate from the drop-down list • **First Name** – Use upper and lower case • **Last Name** – Use upper and lower case • **Date of Birth** – Format = mm/dd/yyyy • **Marital Status** – The default is single. If known, select as appropriate • **As of** – Enter or select the date corresponding to Marital Status • **Gender** – Select as appropriate **National ID** – Enter the Social Security Number (no formatting needed, Campus Solutions will format when you tab out of the field) • **Address** – Select the Address Type, Effective Date, and status. Use the **Edit Address** link to enter address information. If you are updating to a new address, use the Add Row "+" button is used to create a new effective dated row that will contain the updated address information. **Edit Address** Country: United States Change Country Address 1: Address 2: Address 3: City: State: Postal: County: OK Cancel ☐ Override Address Verification *Note:* We are using Clean Address to format addresses entered. It will put on the zip+4, the county, and tell you if the address you used is invalid. If you want to over-ride that, check the *Override Address Verification* box at the bottom. • **Phone** – Select the type, enter the number (no formatting needed) • **Email** - The UNI email address will be the only official address UNI will use. However, we can also enter a personal or work email address.
7.	Click the **Save** button.

Note: Use the **Names** link to make any name change updates and designate a preferred name, if different from the primary name.
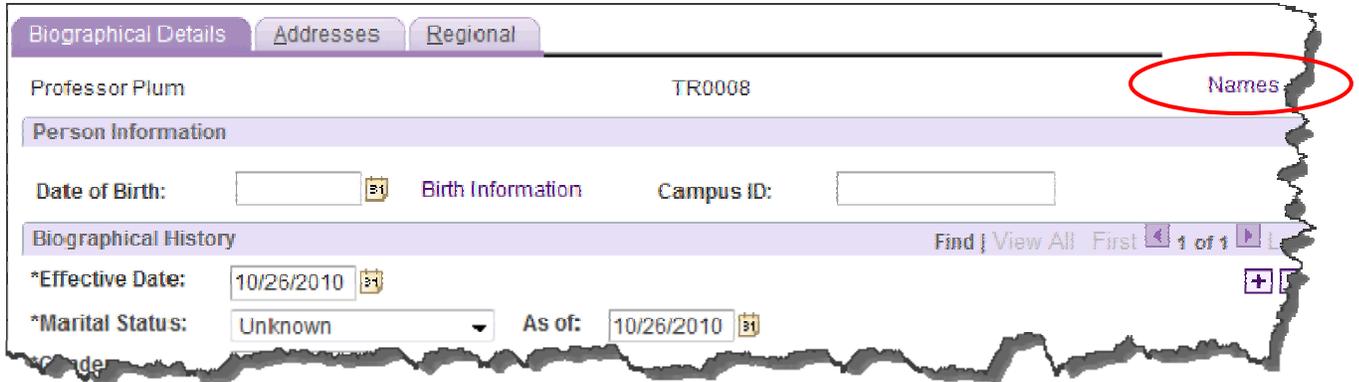
Warning Message:

If there is a potential match (someone with the same last name) or you are entering a duplicate (same National ID (SSN) exists in the system already, the following warning message displays:
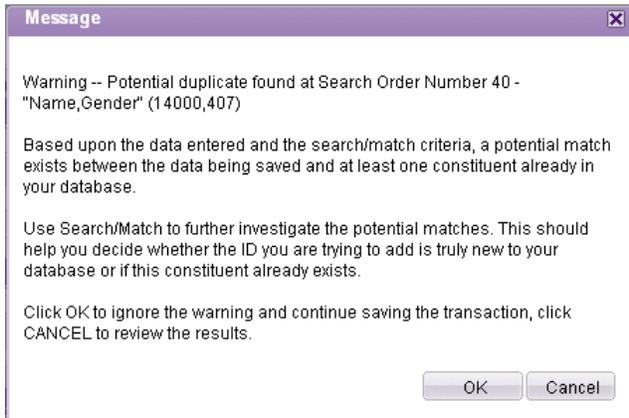
If you have performed a **Search/Match** prior to adding the individual and you are sure this individual does not exist in the system, select **OK** to continue and save.

If you have not performed a **Search/Match** and this record could be a duplicate, click **Cancel**. Open a new window and perform a **Search/Match**.