

MANAGING A PERSON IN THE UF PERSON HUB

The following instructions will walk you through how to manage a person to the UF PERSON Hub.

NAVIGATION

Login into myUFL and navigate to:

Nav Bar > Main Menu > Identity Access Management > Identity Management > Person Hub MII

1. After navigating to a person's page in the UF PERSON Hub, you can add or modify information in a number of different categories. This simulation will walk you through some of the elements that you can modify and where to find them. Click the **Person Info** menu item.

The screenshot shows the UF PERSON Hub interface for a person named Joshua Tree (UFID: 69013988). The left sidebar contains a menu with the following items: Person Summary, Person Info (highlighted with a red box), Names, Affiliations, Addresses, Identifiers, and Email Addresses. The main content area displays various information categories: Person Info (Display Name: Joshua Tree, Gender, Date of Birth: 01/01/1990, Network Managed Dept, Work Title), Affiliations (Primary Affiliation: Staff, Primary Department: IT - ENTERPRISE SYSTEMS (14800000)), Entitlements (Gatorlink Eligible, Email Eligible, Email Location, Level of Assurance), Flags (Published Flag, Protected Flag, Secured Flag, Deceased Flag), Addresses (Personal Address, Business Address), Phone Numbers (Personal Phone: 1 353 532 3535, Business Phone), Email Addresses (Personal Email: joshuatree@gmail.com, Business Email), and Historical Info (Registry Created Date, Registry Last Updated Date).

2. Person Info features a number of different demographic and personal information text fields including things like **Gender**, **Marital Status**, and **Country of Citizenship**. For this guide, example information about Joshua Tree will be entered.

The screenshot shows the 'Person Info' form in the UF PERSON Hub interface. A red box highlights the following fields: Gender, Preferred Language, Marital Status, Person Type (Full), Date of Birth (01/01/1990), City of Birth, State of Birth, Country of Birth, Country of Citizenship, Primary Affiliation (Staff), Primary Dept (IT - ENTERPRISE SYSTEMS (14800000)), Work Title, Network Managed By, Since Date, Created Date (2019-08-13 10:36:09.91), Last Verified Date, Last Update Date (2019-08-13 10:35:10.207), Last Update User (mrmadmus), and Source (JAM Export/Admin).

- Click the **Update** button.

The screenshot shows the 'Current Record : Joshua Tree' page in the Identity Management system. The page displays various personal and organizational details for a user with UFID 69013988. The 'UPDATE' button is highlighted with a red box.

Current Record : Joshua Tree		UFID : 69013988	GatorLink :
Gender: Male	Preferred Language		
Marital Status: Single	Person Type: Full		
Date of Birth: 01/01/1990	City of Birth		
State of Birth	Country of Birth		
Country of Citizenship			
Primary Affiliation: Staff	Primary Dept: IT - ENTERPRISE SYSTEMS (14800000)		
Work Title: IT Analyst	Network Managed By		
Since Date	Created Date: 2019-08-13 10:35:09.91		
Last Verified Date			
Last Update Date: 2019-08-13 10:35:10.207	Last Update User: mdmadmin		
Source: IAM Coord/Admin			
UPDATE	RESET		

- Click the **Names** menu item.

The screenshot shows the 'Current Record : Joshua Tree' page in the Identity Management system. The 'Names' menu item in the left sidebar is highlighted with a red box. A green success message 'Success: Person Updated.' is displayed at the top of the main content area.

Current Record : Joshua Tree		UFID : 69013988	GatorLink :
Success: Person Updated.			
Person Info			
Gender: Male	Preferred Language		
Marital Status: Single	Person Type: Full		
Date of Birth: 01/01/1990	City of Birth		
State of Birth	Country of Birth		

5. Within the **Names** page you can modify elements of the Person's Legal name and Display name. To switch from Display Name to Legal Name, click the **Legal** box.

The screenshot shows the 'Names' page for a user named 'Joshua Tree' (UFID: 69013988). The left sidebar contains a menu with options: Person Summary, Person Info, Names (highlighted), Affiliations, Addresses, Identifiers, Email Addresses, Phone Numbers, Emergency Contact, Flags, System Keys, Relationships, Photo Locations, and History. The main content area is divided into two panels. The left panel, titled 'Display Name', shows the current name 'Joshua Tree' and fields for Prefix, First Name (Joshua), Middle Name, Last Name (Tree), and Generation. It also displays 'Start Date' (2019-08-13 10:35:09.989), 'Last Verified Date', 'Last Update Date' (2019-08-13 10:35:09.989), 'Last Update User' (mdmadmin), and 'Source' (IAM Coord/Admin). There are 'UPDATE' and 'RESET' buttons at the bottom. The right panel, titled 'Display Name', shows the current name 'Joshua Tree' and a 'Legal' box, which is highlighted with a red rectangle. The 'Legal' box contains the text 'Legal' and 'Joshua Tree'.

6. Click the **Affiliations** menu item.

The screenshot shows the 'Affiliations' page for a user named 'Joshua Tree' (UFID: 69013988). The left sidebar contains a menu with options: Person Summary, Person Info, Names, Affiliations (highlighted with a red rectangle), Addresses, Identifiers, Email Addresses, Phone Numbers, Emergency Contact, Flags, System Keys, Relationships, Photo Locations, and History. The main content area is divided into two panels. The left panel, titled 'Legal', shows the current name 'Joshua Tree' and fields for Prefix, First Name (Joshua), Middle Name, Last Name (Tree), and Generation. It also displays 'Start Date' (2019-08-13 10:35:09.957), 'Last Verified Date', 'Last Update Date' (2019-08-13 10:35:09.957), 'Last Update User' (mdmadmin), and 'Source' (IAM Coord/Admin). There are 'UPDATE' and 'RESET' buttons at the bottom. The right panel, titled 'Display Name', shows the current name 'Joshua Tree' and a 'Legal' box, which is highlighted with a red rectangle. The 'Legal' box contains the text 'Legal' and 'Joshua Tree'.

7. Currently Joshua Tree only has one Affiliation, that he is a TEAMS Employee. To add another Affiliation, click the **Plus** button.

The screenshot shows the 'Current Record : Joshua Tree' page with UFID : 69013988. The left sidebar lists various tabs: Person Summary, Person Info, Names, Affiliations (selected), Addresses, Identifiers, Email, Phone Numbers, Emergency Contact, Flags, System Keys, Relationships, Photo Locations, History, Collapse, and Duplicates. The main content area displays the 'TEAMS Employee' affiliation details, including Affiliation Type, UF Dept ID, Start Date, End Date, Dept UFID, and Last Update Date. A red box highlights a blue circular button with a white plus sign in the bottom right corner of the main content area.

8. Click the **Affiliation Type** dropdown.

The screenshot shows the 'Add Affiliation' form. The 'Affiliation Type' dropdown is highlighted with a red box. The form also includes fields for 'Department (Name or UF Dept ID)' and 'End Date'. The 'ADD' and 'CANCEL' buttons are at the bottom. The right sidebar shows the existing 'TEAMS Employee' affiliation.

9. In addition to being a TEAMS Employee, Joshua Tree is also an alumni of UF. Click the **Alumni** list item. Please note: You can start typing the Affiliation name and suggestions will pop up that start with what you have entered. This makes searching for your desired Affiliation faster and easier.

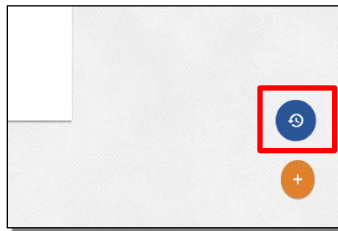
The screenshot shows the 'Add Affiliation' form with the 'Affiliation Type' dropdown menu open. The 'Alumni' option is highlighted with a red box. The dropdown menu lists various affiliation types, including Board of Trustee, CE Participant, Clinical Faculty, Consultant-Faculty, Consultant-Staff, Continuing Education Student, Courtesy Faculty, DCE Student, Departmental Associate, Direct Support Organization Employee, Emeritus, Faculty, Former Applicant, Former Contact, Former DCE Student, Former Employee, and Former Student.

10. Click the **Department** text entry field and REGISTRAR STUDENTS will be entered.

11. Click the **Add** button.

12. Note the new card that has been added with the Affiliation information you entered. You can add as many Affiliations as the person has.

13. Click the **Show History** button.



14. You will see all current and historical affiliations for this person.

195 - TEAMS Employee

IT - ENTERPRISE SYSTEMS (14800000)

Affiliation Type: 195 - TEAMS Employee
Dept Name: IT - ENTERPRISE SYSTEMS
UF Dept ID: 14800000

Start Date: 2019-07-26 05:40:38.591
End Date: mm/dd/yyyy

Dept UFID: 4NETDGCF
Shands Dept ID:
Jax Dept ID:

Last Update Date: 2019-07-26 06:15:23.269
Last Update User: AD020500

UPDATE **REMOVE**

195 - TEAMS Employee

IT - ENTERPRISE SYSTEMS (14800000)

215 - Former Student

REGISTRAR STUDENTS (ST010000)

208 - Alumni

UF ONLINE STUDENT BODY (ST020000)

Affiliation Type	Department	Add er Update	Start Date	End Date	Updated Timestamp	Updated By User	Source
195 - TEAMS Employee	IT-AT Lf COMPUTING HELP DSK (14200300)	U	2018-05-18 05:14:55.978	2019-07-26 05:40:38.591	2019-07-26 05:53:21.572	AD020500	Initial Load
225 - UF Home Department	IT - ENTERPRISE SYSTEMS (14800000)	A	2019-07-26 05:53:07.691		2019-07-26 05:53:21.535	AD020500	Initial Load
195 - TEAMS Employee	IT - ENTERPRISE SYSTEMS (14800000)	A	2019-07-26 05:40:38.591		2019-07-26 05:53:21.478	AD020500	Initial Load
223 - Network Managed By	IT - ENTERPRISE SYSTEMS (14800000)	A	2019-07-25 16:35:03.0		2019-07-25 16:35:03.345		Initial Load
244 - Self-Service User	UF HR TRAINING (TRNGHRUF)	U	2018-06-08 14:44:19.142	2018-09-07 23:59:59.0	2018-09-10 17:31:28.107	AD020500	Initial Load
244 - Self-Service User	UF HR TRAINING (TRNGHRUF)	A	2018-06-08 14:44:19.142	2018-09-07 23:59:59.0	2018-06-08 14:44:19.619	GT3XGGU5	Initial Load
220 - Consultant Staff	IT-AT Lf COMPUTING HELP DSK (14200300)	U	2018-05-10 10:56:24.0	2018-05-19 00:00:00.0	2018-05-21 17:31:40.321	AD020500	Initial Load

15. Click the **Addresses** menu item.

Person Summary
 Person Info
 Names
Addresses
 Identifiers
 Email
 Phone Numbers
 Emergency Contact

Current Record : Joshua Tree UFID : 6

Success: Affiliation Added.

Alumni

REGISTRAR STUDENTS (ST010000)

Affiliation Type: Alumni
Dept Name: REGISTRAR STUDENTS

UF Dept ID: ST010000

Start Date: 2019-08-13 10:40:14.019
End Date: mm/dd/yyyy

Dept UFID: 85462042
Shands Dept ID:

Jax Dept ID:

16. Here you can add a variety of addresses for the Person. Note the Address Type dropdown. Here you can select a number of options, including but not limited to:

Street Address

Mailing Address

Legal Address

Business Address

For this example, we will enter Joshua Tree's Street Address, which is the default option if one has not been added.


17. Click the **Add** button.

18. Click the **Identifiers** menu item.


19. This is where elements like the Person's UFID and Social Security Number are kept. You can add more identifiers by clicking the **Plus** button.

20. Click the **Identifier Type** dropdown to see what Identifier options you can add.


21. Click the **Email Addresses** menu item




Person Summary




Person Info




Names




Affiliations




Addresses



Identifiers



Email




Phone Numbers

← 🔍

Current Record : Joshua Tree

UFID : 69013988

GatorLink : 

Add Identifier

Identifier Type

Identifier Number

Drivers License Number

ERA Commons ID

NSF

ORCID


Passport Number

Social Security Number

VIAF


UFID

69013988



Social Security Number

XXXXX9999



22. Joshua Tree currently only has a Personal Email address listed. You can add more Email addresses by clicking the **Plus** button.

Person
Summary

Person Info

Names

Affiliations

Addresses

Identifiers

Email
Addresses

Phone Numbers

Emergency
Contact

Flags

System Keys

Relationships

Photo Locations

History

Collapse
Duplicates

Current Record : Joshua Tree

UFID : 69013988

GatorLink : [GatorLink](#)

Personal Email

joshuatree@gmail.com

Email Address Usage Type
Personal Email

Email Address
joshuatree@gmail.com

Standard Formatting Indicator

Start Date
2019-08-13 10:35:10.079

Last Update Date
2019-08-13 10:35:10.079

Last Verified Date

Last Update User
m0madmin

Source
IAM Coord/Admin

UPDATE


RESET

REMOVE


Personal Email

joshuatree@gmail.com


23. Click the **Email Address Usage Type** dropdown to see what Email options you can add.




Person



Summary




Person Info



Names

Current Record : Joshua Tree

UFID : 69013988

GetorLink : 

Add Email Address

Email Address Usage Type

Email Address

ADD

CANCEL

Personal Email

joshuatree@gmail.com

24. Click the **Phone Numbers** menu item.

The screenshot shows the 'Add Email Address' form in the Identity Management system. The left sidebar contains a list of menu items: Person Summary, Person Info, Names, Affiliations, Addresses, Identifiers, Email Addresses, **Phone Numbers** (highlighted with a red box), and Emergency. The main content area shows the 'Add Email Address' form with a dropdown for 'Email Address Usage Type' and a text field for 'Email Address'. A 'Personal Email' box on the right displays 'joshuatree@gmail.com'.

25. Joshua Tree currently only has a Personal Phone number listed. You can add more Phone numbers by clicking the **Plus** button.

The screenshot shows the 'Primary Personal Phone' form in the Identity Management system. The left sidebar contains a list of menu items: Person Summary, Person Info, Names, Affiliations, Addresses, Identifiers, Email Addresses, **Phone Numbers** (highlighted with a red box), Emergency, Contact, Flags, System Keys, Relationships, Photo Locations, History, Collapse, and Duplicates. The main content area shows the 'Primary Personal Phone' form with a text field for 'Primary Personal Phone' displaying '1 353 532 3535'. Below this, there are fields for 'Country Code', 'Area Code', 'Phone Number', and 'Extension'. There are also dropdowns for 'Device Type' and 'SMS Capable Indicator'. At the bottom, there are buttons for 'UPDATE', 'RESET', and 'REMOVE'. A red box highlights a plus button in the bottom right corner.

26. Click the **Phone Number Usage Type** dropdown to see what Phone Number options you can add.

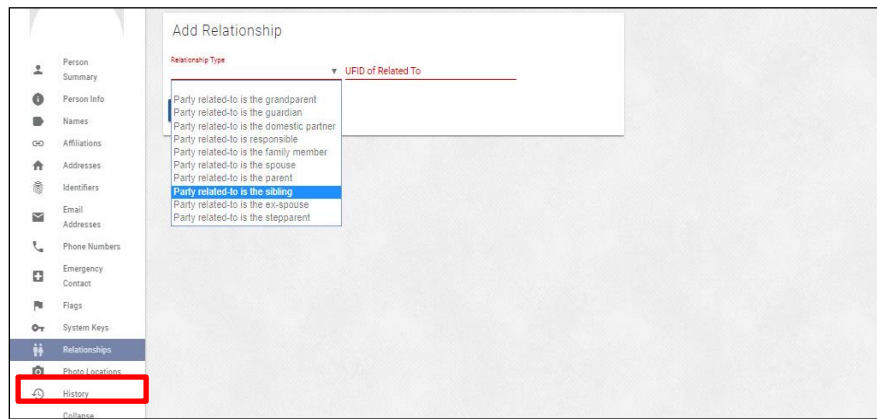
The screenshot shows the 'Add Phone Number' form in the Identity Management system. The 'Phone Number Usage Type' dropdown menu is highlighted with a red box. The form includes fields for 'Country Code', 'Area Code', 'Phone Number', and 'Extension'. There are also dropdowns for 'Device Type' and 'SMS Capable Indicator'. At the bottom, there are buttons for 'ADD' and 'CANCEL'.

27. Click the **Flags** menu item.

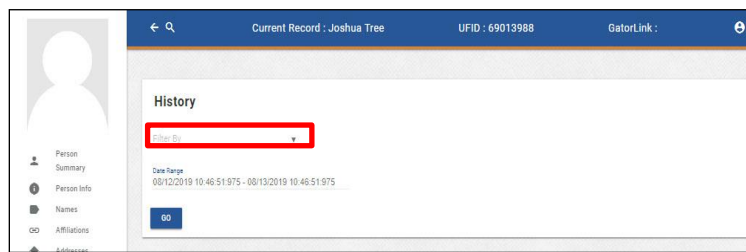
28. Here you can modify whether the Person's information is Protected, Secured, or Published. In addition, this is where you can modify whether the Person is deceased. Click the **Relationships** menu item.

29. In the Relationship menu, you can mark whether the Person has any relatives in the UF system. Click the **Relationship Type** dropdown to see what Relationship options you can add. Please note that if you are adding a Relationship, you must have the relative's UFID Number.

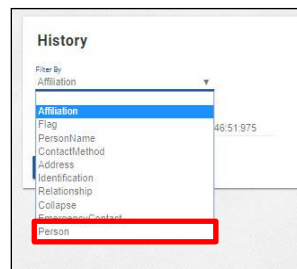
30. Click the **History** menu item.



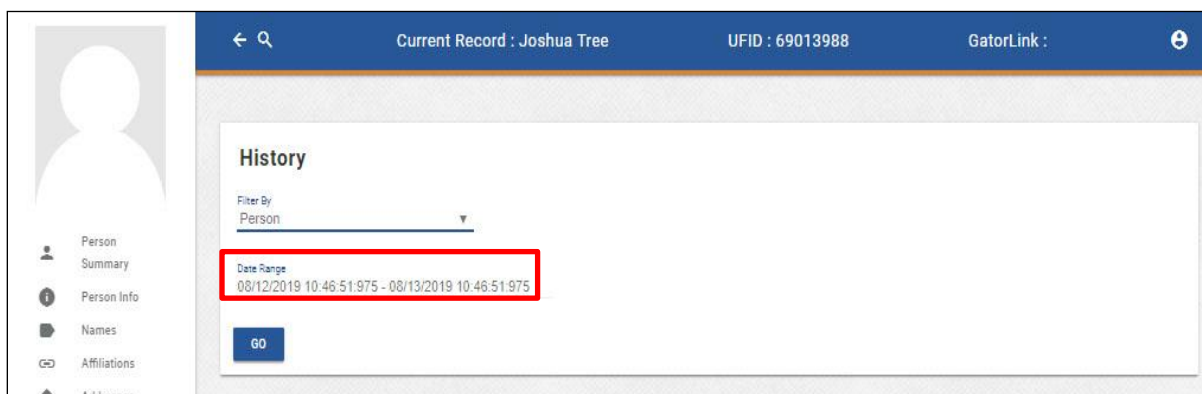
31. The History page allows you to review every change made to a Person's record. Click the **Filter By** dropdown.



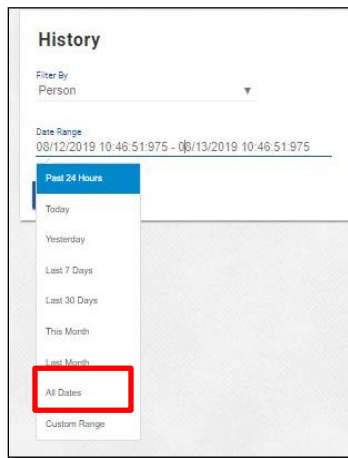
32. For this example, click the **Person** list item.



33. Click the **Date Range** box.



34. You can select any Date Range that you would like to review. Click the **All Dates** list item.



35. Click the **Go** button.



36. The results that appear show all of the changes that were made in the Person Info menu. It lists who made changes and when they made them.

