

Create New SMU ID



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Search Match


Prior to creating a new SMU ID, it is critical you use the Search/Match page in order to avoid duplicate ID's. If you skip this step, a person may end up with multiple id's in my.SMU.

One person - One SMU ID Number.

No exceptions.

1. Click **Campus Community**.
2. Click **Personal Information**.
3. Click **Search/Match**.
4. Select the drop down list for the **Search Type** field, select **Person**.



5. Click **Search**.
6. Under the **Search Results** select, **SMU SRCH/MATCH**.
7. Click **User Default**.
8. Click the Look Up icon to retrieve a Search Result Code. 
9. Click **Look Up**.
10. Click **SMU SRCH RESULTS**.
11. Click **OK**. **Note:** The Search Result Code has been set as a default. The next time you return to this page, it will populate automatically.

12. You should always do the following three Search/Matches to be sure the person you will be entering does not already exist in the system. You may not have all the information to run the first search.

- **National ID** (SSN if available) - most restrictive - If no match is found, run the next Search/Match.
- **Last Name and First Name** - less restrictive - If no match is found, run the next Search/Match.
- **Last Name and First Initial** - the least restrictive - If no possible match is found after a thorough review of the Search/Match results, you can create the new SMU ID.

A search cannot be by last name only. You can search by National ID (a social security number if available), Last Name First Name or Last Name first initial.

13. Enter the desired search criteria. The more values entered the more restrictive the search. If entering a name instead of National ID, two fields must be populated before the Search button will become active. A search cannot be by last name only.

14. Click **Search**.

15. If the returned list is more than 20 rows, click the **View All** links as needed. The Search Results are displayed on the **Results, Results2 and Additional Information** tabs.

Tip: You can expand all tabs by clicking the expand a row button. 

16. Click the detail button review the bio/demographic information for a person. If you find the person for whom you were searching, click the **Carry ID** link and the system will 'carry the ID' to the next page you access.

17. **Note:** Failure to not complete a Search/Match can result in duplicate ID's and may be detrimental to the data integrity to my.SMU.

18. **Process Complete.**



Create New SMU ID

WARNING: If not preceded by running Search Match, you will have to abandon all data entered and begin again with Search Match.

1. Click **Campus Community**.
2. Click **Personal Information**.
3. Click **Add/Update a Person**.
4. Click **Add a New Value**.

Please note: It is important to never type in the word "New" if it is accidentally deleted as this would create a identity named "New" instead of an SMU ID number.

5. Click **Add**.
6. The **Effective Date** will default to the current date but can be changed as required.
Note: When entering a date, you do not need to enter any special characters, only numbers.
7. Select a **Prefix** from the drop down list.
8. Enter the New User's **First** and **Last Name**.
9. A **Middle Name** and **Suffix** can be added if known.
10. Enter the **Date of Birth**, if known.
11. Select the **Marital Status**.
12. Select the **Gender**.
13. Enter the **Social Security Number**.

my.SMU

Navigation: Favorites Main Menu Campus Community Personal Information Add/Update a Person

Top Bar: TRAIN25 On HETRM Questions/Comments Home Add to Favorites Sign out

Buttons: New Window Help

Tabs: Biographical Details Regional

Section: NEW

Section: Person Information

Effective Date: 07/21/2014

*Format Using: English Change Format

Prefix: [Dropdown]

First Name: Peruna Middle Name: [Text Box]

Last Name: Pony Suffix: [Text Box]

Date of Birth: 07/21/1911 Full DOB Birth Info

Section: Biographical History

*Effective Date: 07/21/2014

*Marital Status: Single As of: [Text Box]

*Gender: Male

Section: National ID

*Country: USA *National ID Type: Social Security Number National ID: [Text Box] Primary: [Checkbox]

Add

Section: Contact Information

Addresses Find View All First 1 of 1 Last

*Address Type: Home

Phone

Type	Phone	Ext	Country	Preferred
[Dropdown]	[Text Box]	[Text Box]	[Text Box]	[Checkbox]

Callout Box: If known, enter the new user's Social Security Number. No formatting is required. The system will format the National ID.

14. Home is the default Address Type that will be displayed under Addresses. If a home address is not available, another Address type may be selected by clicking the Address Type list.

The default country is USA. If you are entering a foreign address, you **MUST** change the country by clicking the **Country** list and selecting the correct foreign country. (Once you select the correct country, click the **Edit Address** link and additional instructions are provided on the Addresses page for entering foreign addresses.)

The **Effective Date** will default to the current date or the Effective Date entered under Person Information. This Effective Date may also be changed as required.

Click **Edit Address**.

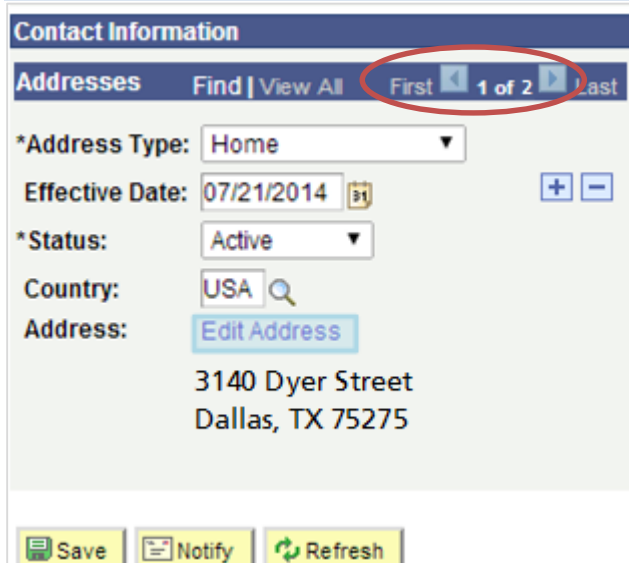
15. Enter the Address. If you have an error in the address, you will see suggestions displayed below the address fields. Review the data you have entered and make the necessary corrections.
16. Click **OK**.

17. To add another Address Type, click the **Add a new row** button. 

18. Click the **Address Type** drop down list and select a value.

The address information previously entered has been copied to the new address type. Click **Edit Address** to change the information.

The number of **Address Types** that have been entered will be reflected on the right side of the **Addresses** bar. Use the right and left arrows or click **View All** to review the **Address Type** information that has been entered.



The screenshot shows the 'Contact Information' section with a sub-section titled 'Addresses'. At the top of the 'Addresses' section is a navigation bar with 'Find | View All' and a pagination control showing 'First', '1 of 2', and 'Last'. The '1 of 2' is circled in red. Below this, there are several fields: '*Address Type:' with a dropdown menu set to 'Home'; 'Effective Date:' with a date field set to '07/21/2014' and a calendar icon; '*Status:' with a dropdown menu set to 'Active'; 'Country:' with a text field set to 'USA' and a search icon; and 'Address:' with an 'Edit Address' button. Below the 'Edit Address' button, the address '3140 Dyer Street, Dallas, TX 75275' is displayed. At the bottom of the section are three buttons: 'Save', 'Notify', and 'Refresh'.

19. Select the **Phone Type** and enter the New User's Phone Number. (No special characters are needed.) Enter additional Phone types and numbers by clicking **Add** and repeating these steps. Click the checkbox to indicate the **Preferred** number if multiple phones are listed.



The screenshot shows the 'Phone' section with a table. The table has six columns: '*Type', '*Phone', 'Ext', 'Country', 'Preferred', and an empty column. The first row has 'Mobile' in the '*Type' column, '214/768-1111' in the '*Phone' column, and a checkbox in the 'Preferred' column. Below the table is an 'Add' button.

*Type	*Phone	Ext	Country	Preferred	
Mobile	214/768-1111			<input type="checkbox"/>	

Add

20. Select the **Email Type** drop down menu. DO NOT enter the campus (camp) email address. The CAMPUS (CAMP) email address type is maintained by OIT and will contain the applicant's assigned email address once it is created.
21. Select the **Email Type** and indicate **Preferred** if more than one is listed.
22. Click the **Citizenship** link.

The screenshot shows the 'my.SMU' web application interface for 'Add/Update a Person'. The top navigation bar includes links like 'Favorites', 'Main Menu', 'Campus Community', 'Personal Information', and 'Add/Update a Person'. The main form area is divided into several sections:

- Biographical History:** Includes fields for 'Effective Date' (07/21/2014), 'Marital Status' (Single), and 'Gender' (Male).
- National ID:** A table with columns for 'Country', 'National ID Type', 'National ID', and 'Primary'. It shows a record for 'USA' with 'Social Security Number' and '123456789'.
- Contact Information:** Includes 'Addresses' and 'Phone' sections. The 'Addresses' section shows a record for 'Home' at '3140 Dyer Street, Dallas TX 75275'. The 'Phone' section shows a record for 'Mobile' with number '2147681111'.

A blue callout box with the text 'Click Citizenship.' points to the 'Citizenship' link located at the bottom of the form, near the 'Visa/Permit Data' section.

23. Click the **LookUp** icon. 🔍

24. Enter the New User's Country of Citizenship.
25. Click **Look Up**.
26. Select the new user's **Country** of Citizenship.
27. If known, select the Citizenship Status. To add a second **Citizenship Status**, click the **Add** icon.
28. Click **OK**.
29. At the top of the page, select the **Regional** tab.



30. Regardless of the number of ethnic groups a person indicates, Hispanic ethnic groups and Non-Hispanic ethnic groups are entered differently. If the new user is Hispanic or Latino, it is imperative to enter this data for reporting purposes.

Click the checkbox, and select their ethnic group from the drop down menu. If the user is not Hispanic/Latino, follow the next steps.

Click the Ethnic Group **Look Up**  icon.

31. Click **Look Up**.



32. Select the New User's **Ethnicity**.

Look Up Ethnic Group

SetID: USA

Ethnic Group: begins with

Description: begins with

Look Up

Select desired Ethnicity

Search Results

View 100 First 14 of 8 Last

Ethnic Group	Description	Short Description
AMIND	American Indian/Alaska Native	Am. Ind.
ASIAN	Asian	Asian
BLACK	Black/African American	Black
HISPA	Hispanic/Latino	Hispanic
NOTHISP	Not Hispanic	Not Hisp.
NSPEC	Not Specified	Not Specif.
PACIF	Native Hawaiian/Other Pacific Islander	Hawai/Pac.
WHITE	White	White

Ethnicity

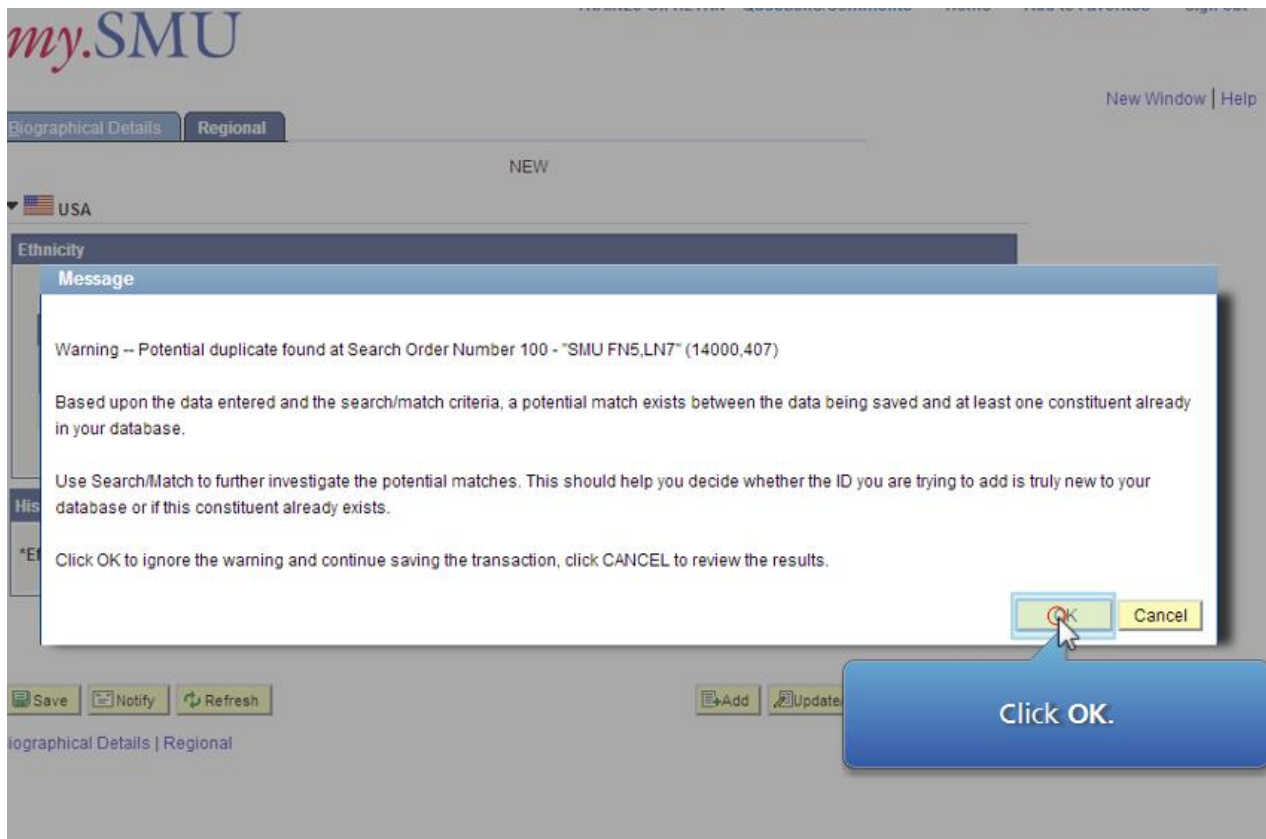
☐ Person is Hispanic or Latino If Yes, Select Ethnic Group

Personalize | Find | First 1 of 1 Last

*Regulatory Region	*Ethnic Group	Description	Ethnic Category	Primary	IPEDS	Percentage
USA	HISPA	Hispanic/Latino	Hispanic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Add

33. Additional rows may be added to enter additional Ethnic Groups. Note: SMU does not track percentage.
34. Click **Add** and repeat steps if additional rows are needed. Click **Save**.
35. You may get a warning that a possible duplicate record has been found. If you did a Search/Match before starting the Create a New SMU ID, you can click **OK** and the system will create the new ID; however, if you did not do a Search/Match at the beginning, you must click **Cancel** and start the process again, beginning with a Search/Match. All previously entered data will be lost.



36. Once processed, a new ID will be displayed on the top right of the page.

37. **Process Complete.**