

# Train the Trainer Modules: Campus Community

## 6.3 Manage Personal Information

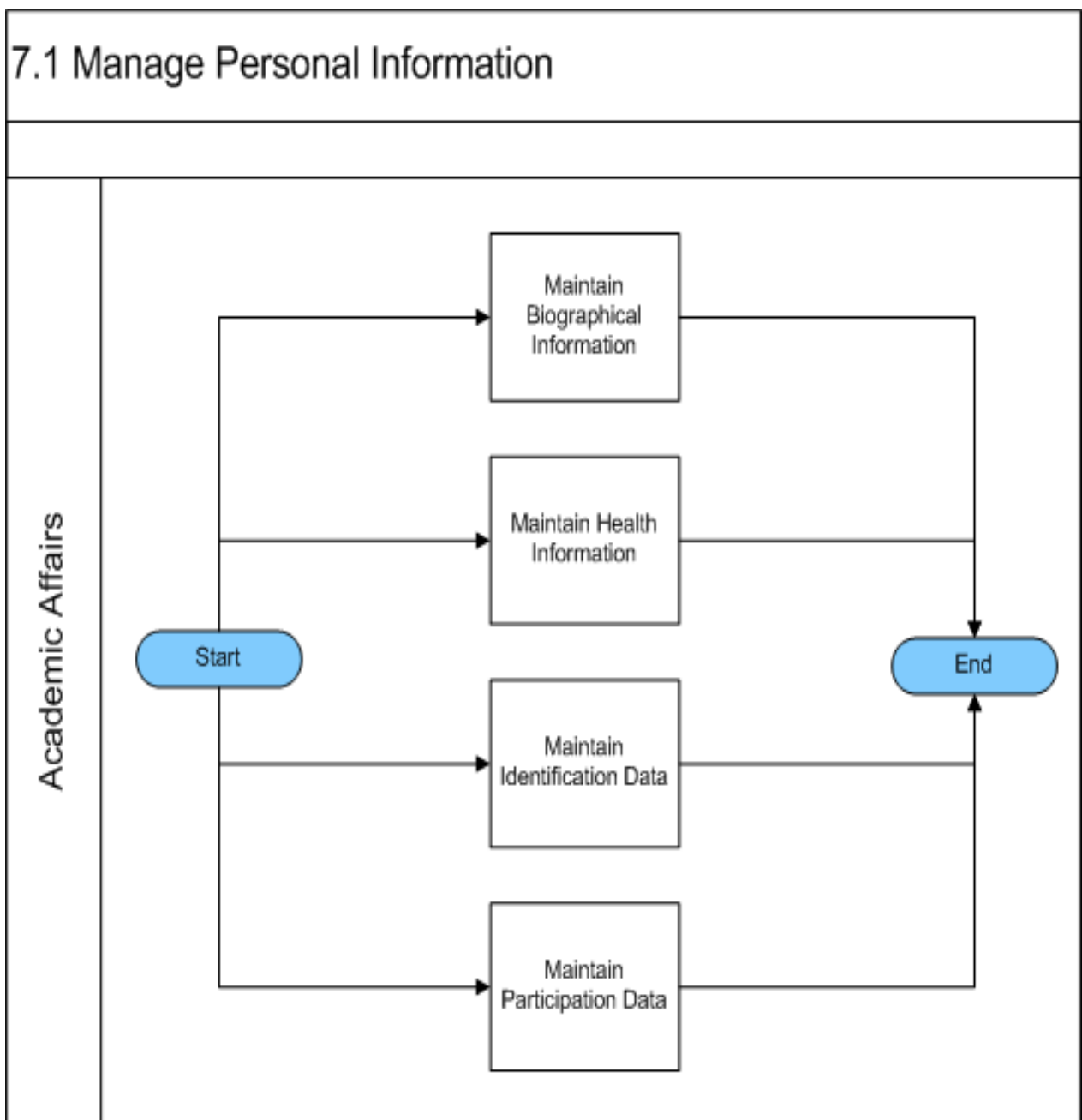
### Introduction

A module to manage personal information of concerned personals and this training will helps you to fully understand all the steps how to add/update biographical, health, identification and participation data for KSAU-SIS.

### Understanding the Manage Personal Information

Manage Personal Information deals with managing and maintaining biographical information e.g. names, addresses etc. , health information e.g. health tests, results of these tests, important dates regarding these tests etc. , identification information like nationality, passport number etc. and participation information like intenal and external awards etc.

### Business Process Map



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### A. Maintaining Biographical Information

Go to page: Campus Community > Personal Information>Add/Update a Person.

Biographical Details
Addresses
Regional

Ali Hassan Hassan 1 [Names](#)

**Person Information**

Date of Birth:  [Birth Information](#) Campus ID:

**Biographical History** Find | View All First 1 of 1 Last

\*Effective Date:  + -

\*Marital Status:  As of:

\*Gender:

**National ID** Personalize | Find | First 1 of 1 Last

*Country	*National ID Type	National ID	Primary
SAU	Saudi ID	<input type="text"/>	<input checked="" type="checkbox"/>

[Add](#)

**Contact Information**

**Addresses** Find | View All First 1 of 1 Last

Address Type: Home [Addresses](#)

Effective Date: 02/07/1435

Status: Active

Country: SAU

Address:  
House 201  
riyadh RIYĀD

**Phone**

*Type	*Phone	Ext	Country	Preferred
Home	123456789			<input checked="" type="checkbox"/>

[Add](#)

**Email**

*Type	*Email Address	Preferred
Campus	abc@xyz.com	<input checked="" type="checkbox"/>

[Add](#)

[Visa/Permit Data](#) [Citizenship](#)

[Save](#)
[Return to Search](#)
[Notify](#)
[Refresh](#)
[Add](#)
[Update/Display](#)
[Include History](#)
[Correct History](#)

Following are important terms that you should need to understand to fully utilized the system:

When you add a new person and are using system-generated IDs, the field at the top of the page displays the value *NEW* until you save the record. When you access the record after having saved it, the field displays the ID that the system assigned to this individual.

#### Person Information

##### **Date of Birth**

Enter the individual's date of birth.

##### **Birth Information**

Click this link to access the Birth Information Detail page, on which you can enter or edit the individual's birth location, country, and state.

##### **Campus ID**

Enter the campus ID with which this person is most closely associated.

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### Biographical History

#### **Effective Date** (Required)

Enter the date when the marital status and gender should be effective in your system.

**Note.** If you are changing the individual's marital status, you *must* enter an effective date.

**Note.** If you change the individual's name prefix, first, middle, or last name, suffix, or marital status, you *must* enter an effective date.

#### **Marital Status** (Required) and **As of**

Specify the individual's marital status (such as single, married, or divorced) and the date (if known) on which the associated marriage or divorce took place.

Values for the Marital Status field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

#### **Gender** (Required)

Enter the gender of this individual. Gender is used for reciprocal relationships (mother and daughter, mother and son, brother and sister, and so on). Values are:

Male

Female

Unknown

### National ID

#### **Country**

Enter or confirm the country of this individual's national ID.

If the individual has more than one national ID, you can add them here.

#### **National ID Type** (national ID type)

The system enters the value that you establish for this country on the National ID Type Table page. You can override this default value.

#### **National ID**

Enter the individual's national ID number.

Enter the number (with or without spaces and dashes). When you exit the field, the system formats the number based on the country and NID type selected.

#### **Primary**

Select this check box to indicate the primary national ID number to use for this individual. You must indicate a primary national ID.

### Contact Information

#### **Address Type**

Select the type of address to enter, view, or update. The system displays Home as the default address type and displays the data, if any, for that address type.

#### **Edit Address**

Click this link to access the Edit Address page, on which you can enter or edit address data for the address type selected. When you click OK on the Edit Address page, the data that you entered appears on the Biographical Details page when you return to the page.

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### Phone

Select a phone type and enter the individual's phone number for that type.

### Email

Select an email type and the individual's email address for that type.

### Visa/Permit Data

Click this link to access the Visa/Permit Data page, on which you can enter or update the individual's visa and permit data.

### Citizenship

Click this link to access the Citizenship page, on which you can enter or update the individual's citizenship and passport data.

Biographical Details
Addresses
Regional

Ying Chu
SEV1001

Current Addresses <span style="float: right;"><a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>  First <span style="margin: 0 5px;">◀ 1-2 of 2 ▶</span> Last</span>				
Address Type	Address	Effective Date	Status	Edit/View Address Detail
Home	901 W. Ash Apt 3-B Encino, CA 95207-2311	10/28/2002	Active	<a href="#">Edit/View Address Detail</a>
Permanent	8023 N 98th St Apt 3092 Calgary ON A7B 3W2	10/28/2002	Active	<a href="#">Edit/View Address Detail</a>

Add Address

**Effective Date:**  **Status:** Active

**Country:**  United States

**Address:** [Edit Address](#)   [Address Linkage](#)

Submit
Reset

Add Address Types

- \* Home
- Mailing
- Business
- Check
- Dormitory
- Legal
- Campus
- Other
- Billing
- Other 2

The following fields are required for the foreign address:

- Country
- Address 1

The following fields are required for the U.S. address:

- Address 1
- City
- State
- Postal

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Access the **Regional page** (click the Detail link on the Integrated Search Results page, then Regional tab).

The screenshot shows a web interface with two tabs: 'Biographical Details' and 'Regional'. The 'Regional' tab is active. Below the tabs, there is a 'Universal ID' field with the value 'UID\_CCCM0014' and a 'Score' field with the value '80'. A dropdown menu shows 'USA' with a flag icon. Below this is a 'Detail' section with a blue header. Inside the 'Detail' section, there are several fields: 'Effective Date' with the value '10/24/2008', 'Military Status' with the value 'Veteran of the Vietnam Era', and two checkboxes: 'Eligible to Work in U.S.' (checked) and 'VA Benefit' (checked).

Regional page

This page displays regional information of a person

#### ➤ How to "Add/Update a Person"?

Following are the minimum requirement to add a person:

Minimum Required Fields	Sample Values
First Name	Ali
Family Name	Hassan
Gender	Male
National Id Type	Saudi Id
Phone Type	Home
Phone	1234567
Email Type	Campus
Email Address	abc@xyz.com

#### Execution steps:

**Step 1:** Login with the KSAU sample users for this process [Sample User = "KS\_AAO", Password = "123"]

**Step 2:** Go to page: Campus Community > Personal Information>Add/Update a Person

**Step 3:** On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page. OR click on the "Add a New Value" tab, Enter "ID" and click "Add" to open the page.

**Step 4:** Enter the following values:

**First Name:** Enter the Person's name

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**Father Name:** Enter person's Father name.

**Gender:** Select the appropriate value from the list.

**Phone Type:** Select the appropriate value from the list.

**Phone:** Enter person phone number.

**Email Type:** Select the appropriate value from the list.

**Email Address:** Enter person email address.

**Step 5:** Click "Save".

**Step 6:** Click "**Addresses**" and Enter the following values:

**Effective Date:** Enter the effective date of the address.

**Status:** "**Active**"

**Country:** Select the appropriate value form the list.

**Add Address Type:** Select the appropriate check box.

Then click on "**Edit Address**" and enter the following values:

**Address 1:** Enter address detail of person

**City:** Enter city of person address

**Step 7:** Click "Save".

**Step 8:** Then click on "Submit" button and this

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### B. Maintaining Health Information

Go to page: Campus Community > Personal Information > Health Information > Immunizations and Health.

**Immunization** **Health Test**

Ali Hassan Hassan 1

**Immunizations** Find | View All First 1 of 1 Last

\*Immunization:   Flu \*Immunization Number:

Date Taken:   Expiration Date:

Date Received:   \*Immunization Status:

Comment:

**Immunization Criteria** Find | View All First 1 of 1 Last

\*Criteria Number:   Does Not Apply  Test Taken  Test Not Taken

Description:

Date Taken:   Expiration Date:

Date Received:   Immunization Status:

[Immunization](#) | [Health Test](#)

Following are important terms that you should need to understand to fully utilize the system:

#### Immunization

Enter the immunization, from the Immunization Table page, that this individual has received.

#### Immunization Number

The number of this immunization on the list of immunizations for this individual. The system displays the next sequential number for each immunization that you add. You can override the number to reorder the list of immunizations.

#### Immunization Status

Select the status of this immunization, such as complete, not on file, or partial. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

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The screenshot shows two forms within a software interface. The top form is titled "Health Test" and is for a user named "Shiue-Lin Yan" with ID "CC0021". It contains fields for "Health Test" (TB), "Tuberculosis", "Health Test Number" (1), "Date Taken" (09/23/2003), "Date Received", "Test Value", "Test Result" (Negative), and a "Comment" field. The bottom form is titled "Health Test Criteria" and is for "Criteria Number" 1. It has radio buttons for "Does Not Apply" (selected), "Test Taken", and "Test Not Taken". It also has fields for "Description" (Blood test), "Date Taken", "Date Received", "Test Value", and "Test Result" (Negative).

### Health Test

#### Health Test

Select the health test, from the Health Test Table page, that this individual has taken.

#### Health Test Number

The number of this health test on the list of health tests for this individual. The system displays the next sequential number for each health test that you add. You can override the number to reorder the list of health tests. Test Value Enter the test result value, in alphabetic, numeric, percentage, or other form, as expressed by the medical community (for example, AB or O for blood type; or 177 for cholesterol).

**Test Result** Select the overall test result. Values are:

Negative

Neutral

Positive

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

#### Health Test Criteria

When criteria are associated with this health test on the Health Test Table page, the system is plays the criteria data in this group box.



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#### ➤ How to "Maintain Health Information"?

Following are the minimum requirement to add a person's health information:

Minimum Required Fields	Sample Values
Immunization	Flu
Date Taken	01/20/1435
Expiration Date	01/29/1435
Immunization Status	Complete

#### Execution steps:

**Step 1:** Login with the KSAU sample users for this process [Sample User = "KS\_AAO", Password = "123"]

**Step 2:** Go to page: Campus Community > Personal Information > Health Information>Immunizations and Health

**Step 3:** On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

**Step 4:** Enter the following values:

**Immunization:** Select the appropriate value from the list.

**Date Taken:** Enter the date when that immunization was taken.

**Expiration Date:** Enter the expiration date of the immunization.

**Immunization Status:** Select the appropriate value from the list.

**Comment:** Enter comments if necessary.

**Step 5:** Click "Save". This will update student health information in the system.

#### C. Maintaining Identification Data

Goto page: Campus Community > Personal Information > Identification> Citizenship> Citizenship and Passport.

**Citizenship/Passport** Find | View All First 1 of 1 Last

\*Country: ABW Aruba      Citizenship Status: [ ]

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**Passport Information** Find | View All First 1 of 1 Last

\*Passport Number: 123456

Issue Date: [ ]      Expiration Date: [ ]

Country: ABW Aruba

State: [ ]

City: [ ]

Issuing Authority: [ ]

Comment: [ ]

Save    Return to Search    Notify

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Following are important terms that you should need to understand to fully utilized the system:

#### Country

Specify the country of the individual's citizenship.

#### Citizenship Status

Specify the status (for example, native, naturalized, or alien permanent) of this individual's citizenship in the specified country. These status values are from the Citizen Status Table page.

#### Passport Information

Passport Number Enter the number from the individual's official passport. Chapter 40 Managing Personal Identification Data

#### Issue Date

Enter the official issuance date that is stamped on the passport.

#### Expiration Date

Enter the official expiration date that is stamped on the passport.

#### Country

Specify the country where the passport was issued. Additional location fields appear based on the country that you select, so that you can provide additional location details, such as city and state or province.

#### Authority

Enter the name of the agency or authority that issued the passport.

#### Comment

Enter comments to further describe the individual's citizenship, passport, or nature of the issuance of the passport.

#### ➤ How to "Maintain Identification Data"?

Following are the minimum requirement to add/update identification data of a person:

Minimum Required Fields	Sample Values
Country	ABW
Citizenship Status	Choose from dropdown
Passport Number	123456
Issue Date	01/29/1430
Expiration Date	01/29/1435

#### Execution steps:

**Step 1:** Login with the KSAU sample users for this process [Sample User = "KS\_AAO", Password = "123"]

**Step 2:** Go to page: Campus Community > Personal Information > Identification > Citizenship > Citizenship and Passport

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**Step 3:** On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

**Step 4: Enter the following values:**

**Country:** Select the appropriate value from the list.

**Citizenship Status:** Select the appropriate value from the list.

**Passport Number:** Enter the person passport number.

**Issue Date:** Enter passport issue date.

**Expiration Date:** Enter passport expiration date.

**Step 5:** Click "Save". This will update student passport information in the system.

#### D. Maintaining Participation Data

Goto page: Campus Community > Personal Information > Participation Data>Accomplishments>Honors and Awards.

**Honors/Awards Detail** Find | View All First 1 of 1 Last

\*Internal/External: Internal \*Date Recvd: 02/07/1435

\*Academic Institution: KSA Univ. of Health Sciences

Honor/Award: BRAWRD Best Resident Award

Formal Description: Best Resident Award

Grantor:

Career: Term:

Academic Program: Tran Level: Degr Prog

Academic Plan: System Generated:

Comment:

Save Return to Search Notify

Following are important terms that you should need to understand to fully utilized the system:

#### Internal/External

Select the type of honor or award that the individual received. Values are: Internal External

#### Honor/Award

Select the honor or award that was received. The available honors and awards are from the Honors/Awards Table page.

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#### Career, Academic Program, Academic Plan, Term, and Tran Level (transcript level)

These fields appear when you select Internal. The transcript level that was set on the Honors/Awards Table page for the selected honor or award appears as the default value in the Tran Level field. You can override it to select a different transcript level on which to include this honor or award. Enter values in the other fields as required by your institution for internal honors and awards.

#### ➤ How to "Maintain Participation Data"?

Following are the minimum requirement to maintain participation data of a person:

Minimum Required Fields	Sample Values
Internal/External	Internal
Academic Institution	KSAU
Honor/Award	BRAWRD
Organization	(Org name)
Membership Date	01/20/1435

#### Execution steps:

**Step 1:** Login with the KSAU sample users for this process [Sample User = "KS\_AAO", Password = "123"]

**Step 2:** Go to page: Campus Community > Personal Information> Participation Data>Accomplishments>Honors and Awards

**Step 3:** On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

**Step 4:** Enter the following values:

**Internal/External:** Select the appropriate value from the list.

**Academic Institution:** KSAU

**Honor/Award:** Select the appropriate value from the list.

**Comment:** Enter comments if necessary.

**Step 5:** Click "Save".

**Step 6: Go to page:**Campus Community > Personal Information>Participation Data>Accomplishments>Memberships

**Step 7:** On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

**Step 8:** Enter the following values:

**Organization:** Select the appropriate value from the list.

**Membership Date:** Enter the date on which the individual's membership began.

**Step 9:** Click "Save". This will update student participation data information in the system.