

Voyager Patron Record Purge for I-Share Libraries

(posted 09/05/2006)

Overview

With the Voyager 6.1 upgrade I-Share libraries have access to new functionality called Patron Record Purge. This server-level program allows for deleting patron records in batch based on the Purge Date or Expiration Date found in individual patron records. Each library decides the cutoff date for the purge based on local workflow decisions and batch load practices. Individual records with linkages within the database (items charged, stub records in other databases, and other “exceptional” situations – see details below) are not deleted by the batch job.

Libraries that want to have a Patron Record Purge done on their database need to file a WRO (Work Request Online). All purge jobs are run in test mode first so anticipated results can be approved by the library before the job is run in production/delete mode. Both the test mode and delete mode runs generate output reports that are placed in the library's xxxftp account for local review.

It is the library's responsibility to review the output files that are produced by the test run to make sure the library has selected the correct parameters in their WRO for this batch job. These files should be reviewed very carefully because it will not possible to back out from a production/delete mode run of the Patron Record Purge program.

Technical details about Patron Record Purge (a.k.a. Voyager Circjob 39) are available in the Voyager 6.1 Technical User's Guide, starting on page 8-22.

Filing the WRO

If your library wishes to have a Patron Record Purge performed, your I-Share Liaison or Library Director must file a WRO (Work Request Online) <<http://ilcso.illinois.edu/wro/cgi/wro.cgi>>. Select the WRO type “Voyager Circ 39 Patron Record Purge.”

The screenshot shows a web browser window with the URL http://ilco.illinois.edu/wro/cgi/wro.cgi?action=add_new&SESSION_ID=RRgpbYCuXRoAAAL1yhs&SESSION_ID=RRgpbYCuXRoAAAL1yhs. The browser tabs include 'Getting Started', 'Latest Headlines', 'CARLI', and 'University of Illinois a...'. The page title is 'Work Request Online'. Navigation buttons include 'Add New Work Request', 'Search/Update Work Request', 'Personal Information', and 'Logout'. The main heading is 'Adding a New Work Request: Voyager Circulation 39 - Patron Record Purge'. Below this, there is a link to I-Share documentation: <http://www.carli.illinois.edu/I-Share/docs/circ/patron-rec-purge.pdf>. A note states: 'I-Share specific documentation on Patron Record Purge is available from... Endeavor's generic documentation may be found in the Voyager Technical User's Guide (version 6.1 or higher).'. Another note says: 'CARLI Data Services will run this job in test mode (not deleting online data) until approval to run in "live" mode is received from the library.' There are two radio button options: 'Use Expiration Date in patron record' (selected) and 'Use Purge Date in patron record'. A text field is labeled 'Delete patron records whose Expiration or Purge date is on or before the following date:'. Navigation buttons include '<- Back -' and '- Next ->'. The status bar at the bottom shows 'Done'.

On the WRO form for Patron Record Purge, select whether the patron's Expiration Date or the Purge Date* should be used for the purge. The option for "Use Expiration Date in patron record" is selected by default, because it is anticipated that most I-Share libraries will use this option for their first run(s) of this new batch job.

In the design of the Voyager system, the *Purge Date was intended to be the field used for Patron Record Purge jobs. But since the field has not been used for any purpose up until Voyager V6.1, some libraries have not been putting meaningful data in this field. Consequently, you may find out that using the Expiration Date works better for your library. This would be a good time to consider whether your library should change the way that the values in the Expiration Date and Purge Date fields are set.

An I-Share macro can also be used to change purge dates in existing records, if using the expiration date is not a useful alternative for your library. See <http://www.carli.illinois.edu/I-Share/secure/macros/> for more information on I-Share shared macros. Contact CARLI staff at support@carli.illinois.edu if you need more information or assistance with these macros.

To help you decide whether to use the Purge Date or the Expiration Date, and to help you select a cutoff date, CARLI has provided a set of Access queries. These are included with the Access reports that were distributed with the Voyager V6.1 clients. They are also available from the I-Share Shared SQL site, http://www.carli.illinois.edu/I-Share/secure/sql/local_man.html the queries are:

Count of Patrons by expire_date
Count of Patrons by purge_date
Expired Patron Records for Deletion
Patron record purge date information

The cutoff date to be used is at the discretion of the library. Some factors in deciding what date should be used include: how often the library performs batch loads of new/updated patron records; how often your patrons re-enroll after a break in their registration status at your institution; how often your community borrowers re-activate their patron records after they have expired.

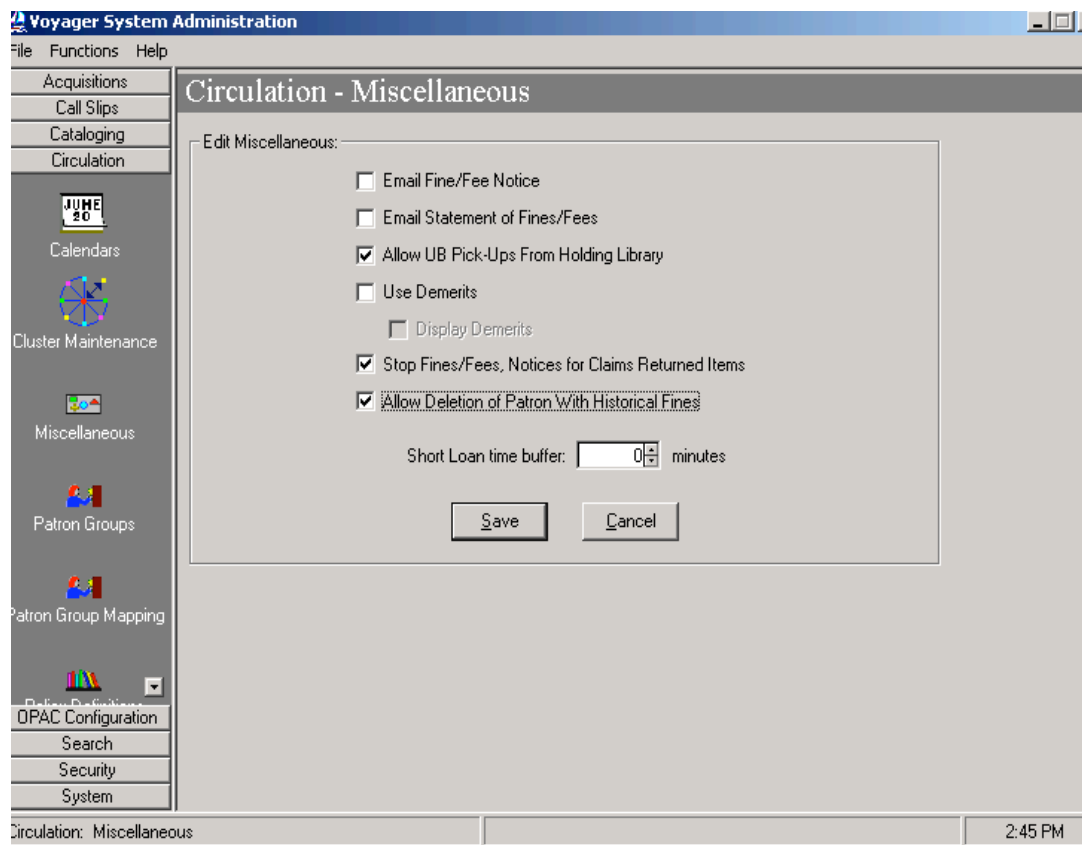
Once the library decides whether the Expiration Date or Purge Date field should be used as the cutoff date for the purge, the actual cutoff date to be used must be entered in the input box labeled "Delete patron records whose Expiration or Purge date is on or before the following date." The purge program will delete individual records whose Expiration or Purge date is before or matches the date entered here, if there are no exceptions to prevent the deletion (see below).

NOTE: There is not an option in Patron Record Purge at the present time to limit the purge to records of a particular patron group/type (e.g., only purge student, faculty, and staff patron groups). This means that all patron records, including those that are usually created manually in the circulation client, are eligible for deletion, if there are no exceptional situations linked to the individual records.

It is recommended that libraries select a cutoff date for the purge that is a date in the past. A common cutoff date is one that allows for records that have expired in the last year to remain in the database. For example, if the purge is being requested in October 2006, the cutoff date could be October 1, 2005 or earlier.

Historical Fines and Fees Option

Another consideration in running the Patron Record Purge job is whether records that have historical fines or fees (i.e., patron XYZ paid a fine of \$\$\$ on <date>, etc.) should be deleted. This option is set in the library's System Administration client (SysAdmin/Circ/Miscellaneous), rather than as a parameter set in the batch job/WRO. If this SysAdmin option is selected, patron records with historical fines or fees are eligible for deletion either online in the circulation client or via the Patron Record Purge program.



If this option is not enabled in SysAdmin, then the purge program does not delete patron records that have historical fines or fees.

If an individual patron record has both current (i.e., unpaid) and historical (paid) fines or fees, the record will not be deleted by the purge program despite the SysAdmin setting above, because current fines/fees are an exception that prevents the deletion.

Libraries should decide whether historical fines or fees should be an exception and set this value in their System Administration client before the WRO is filed for Patron Record Purge.

When the library files the WRO, CARLI Data Services staff will run the patron record purge job in test mode. This will allow library staff to see the output reports that are generated by the program without any records actually being deleted. Details about the content of the output files are below, but in summary they show which records would be deleted (or not deleted) when the job is run in production/delete mode. The output files will be placed in the library's xxxftp account on the reports server (where xxx represents the library's three-letter I-Share abbreviation).

Library staff should review the output files and then must advise CARLI staff in writing whether to proceed with the production/delete mode run of the job or not. If the

production run is to be done, the output files from the production run will also be placed in the library's xxxftp account on the reports server.

Patron Record Purge Output Files

When Patron Record Purge is run in either test or production/delete mode, the system creates many output files, which are copied into the library's xxxftp account. These files include a log file, a deleted file, and various exception files.

NOTE: These files are in the default format as supplied by Endeavor, and are currently not in a particularly user-friendly format. CARLI staff hope to create a local workaround to this, but we feel it is important to provide the ability to run the job "as is" for now. Please watch for announcements about local enhancements to these output files in the future.

NOTE 2: Patron Record Purge also deletes eligible stub records from a database. This means that some of the records in the output files may represent patrons from another I-Share library with a stub record in your database. There is no way currently to separate/distinguish the stub records from local records in the output files.

All output files begin with the text "patron.purge" and end with a date/time stamp in the format `yyyymmddhhmmss` (where `yyyymmdd` represents the year, month, and day of the test or production run and `hhmmss` is the time the job was run in hours, minutes, and seconds).

For example, the following are typical output files from a run of Patron Record Purge:

```
patron.purge.deleted.20060809132611  
patron.purge.finesfees.20060809132611  
patron.purge.historicalfines.20060809132611  
patron.purge.itemscharged.20060809132611  
patron.purge.log.20060809132611  
patron.purge.stubexists.20060809132611
```

The main log file

The "log" file (`patron.purge.log.yyyymmddhhmmss`) is perhaps the most useful output report from this process. It contains at least one line for each record in the input file and shows whether the record would be/was deleted or not, and if the record was not deleted, an indication of the exceptional situation(s). Following these notations, the Voyager patron record ID and the patron's last and first name are also listed. If a single record has more than one exceptional situation, the patron's ID and name information is repeated on a separate line for each exception. The file is pipe-delimited, which enables it to be more easily imported into Excel, to allow for different sort options.

For example, the following “Log” file (with real patron data masked for privacy purposes):

```
DELETED | 1 | LastName1 | FirstName1  
DELETED | 2 | LastName2 | FirstName2  
NOT DELETED | Current Fees | 5 | LastName3 | FirstName3  
NOT DELETED | Current Charged Items | 5 | LastName3 | FirstName3  
DELETED | 7 | LastName4 | FirstName4  
DELETED | 10 | LastName5 | FirstName5  
NOT DELETED | A stub record exists for this patron | 11 | LastName6 | FirstName6
```

The deleted records file

For all records that will be/are deleted by this program, the system creates a file named patron.purge.deleted.yyyymmddhhmmss (where yyyymmddhhmmss is the date/time stamp the program was run). This file contains all patron records in Voyager patron SIF format that would be/were deleted during the run of this job. This file is included by Endeavor as a potential way to re-load unintentionally deleted records from this batch job.

However, there is a bug in the purge program that affects the format of these deleted files, and they are not in true SIF format. Therefore, at the present time, these files cannot be used to re-load any records that are deleted by the purge program. This means the library must carefully review the log files that are produced by the test run to make sure the library has selected the correct parameters in their WRO for this batch job. If any problems are discovered in the review, the library should work with CARLI staff to adjust the job parameters before the production run, or cancel the production run altogether. It will not be possible to back out from a production/delete mode run of the Patron Record Purge program.

The exceptional situations files

For each exception that is encountered while running this job, the system creates a file named patron.purge.name.yyyymmddhhmmss where:

- name is the exception name from the table followed by the date/time stamp the program was run). The table below is adapted from the Voyager 6.1 Technical User's Guide, page 8-23.
- yyyymmdd is the date (year, month and day)
- hhmmss is the time (hours, minutes, seconds)

Each exception file contains the patron records in the Voyager patron SIF format that could not be deleted for that particular exceptional situation.

Patron records that match the criteria specified on the WRO are removed from the database (in the production/delete mode run) as long as the records do not contain any of the exceptions listed below.

Patron Record Purge Exceptions/by Name

Name	Exception
itemscharged	current charged items
holdrecall	current hold/recall
finestees	current fees
demerits	current demerits
exception	a circulation transaction exception has been logged against the patron
bookings	current media schedule bookings
callslip	current call slip requests
routinglist	patron is on routing list
shortloan	current short loans
proxy	patron is proxy for another patron
ubcharge	current UB charges
ubfine	current UB fines
ubrequest	current UB requests
ubdemerits	current UB demerits
stubexists	a stub record exists for the patron in another database
historicalfines	historical fines or fees NOTE: The SysAdmin setting noted earlier allows patron records with historical fines/fees eligible for deletion.
sqlerror	SQL Error

NOTE: the "historicalfines" exception file is created for each run of the purge program, whether or not the library has selected this option in the SysAdmin client. In other words, even if the library has elected to have patron records purged that have historical fines and fees, this file is created. All other exception files should represent records that were not deleted because of the exception.

Getting help

For assistance with any questions regarding Patron Record Purge, contact the CARLI Office (email: support@carli.illinois.edu or phone: 217-244-7593 or toll-free in Illinois: 866-904-5843).

To have a Patron Record Purge job run for your library, your I-Share Liaison or Library Director must file a WRO to initiate this process. General information about WRO is available from <http://office.ilcso.illinois.edu/Docs/wro.html>.