# Voyager Patron Record Purge for I-Share Libraries
(revised 9/26/2012)

## Overview

With Voyager version 6.1 and higher, I-Share libraries have access to 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. Use of Patron Record Purge is at the discretion of the library, but the CARLI Office strongly encourages I-Share libraries to routinely delete obsolete patron records from their database, in order to remove sensitive data that is no longer needed for the library's current operations.

Each library decides the cutoffdate for the purge, based on local workflow decisions and batch load practices. Individual records with any linkages within the database (items charged, stub records in other databases, and other "exceptional" situations – see details at the end of this document) are <u>not</u> 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 <u>test</u> mode first, pending approval by the library before the job is run in production/delete mode. Both the test mode and production (i.e., delete) mode runs generate output reports that are placed in the library's xxxftp account on the files server for local review.

It is the library's responsibility to review the log file that is produced by the test run to make sure the library has selected the correct parameters in their WRO for this batch job. This file should be reviewed very carefully, because it is 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 7.2 Technical User's Guide,* starting on page 8-23.

**Filing the WRO**

If your library wishes to have a Patron Record Purge performed, your I-Share Liaison, Library Director, or their designate must file a WRO (Work Request Online). Select the WRO type "Voyager Circ 39 Patron Record Purge."



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. Most I-Share libraries will use the Expiration Date.

NOTE: In the design of the Voyager system, the Purge Date was intended to be the field used for Patron Record Purge jobs. But because that field was not used for any purpose before Voyager version 6.1, some libraries have not been putting meaningful data in this field. Consequently, you may find 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, for future runs of Patron Record Purge.

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. Macros can also be used to reset the expiration date in selected patron records, to make them either eligible or ineligible for a purge based on expiration date, depending on the cutoff date selected for the purge. 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 in the CARLI_Reports_2009.mdb file, and they are also available from the I-Share Shared SQL site <http://www.carli.illinois.edu/mem-prod/i-share/secure/sql/sql-local_man.html>. The queries are listed below, and more details about each of them are available from the Shared SQL page.

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 for the purge 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 strongly recommended that libraries only 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 2011, the cutoff date could be October 1, 2010, 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.
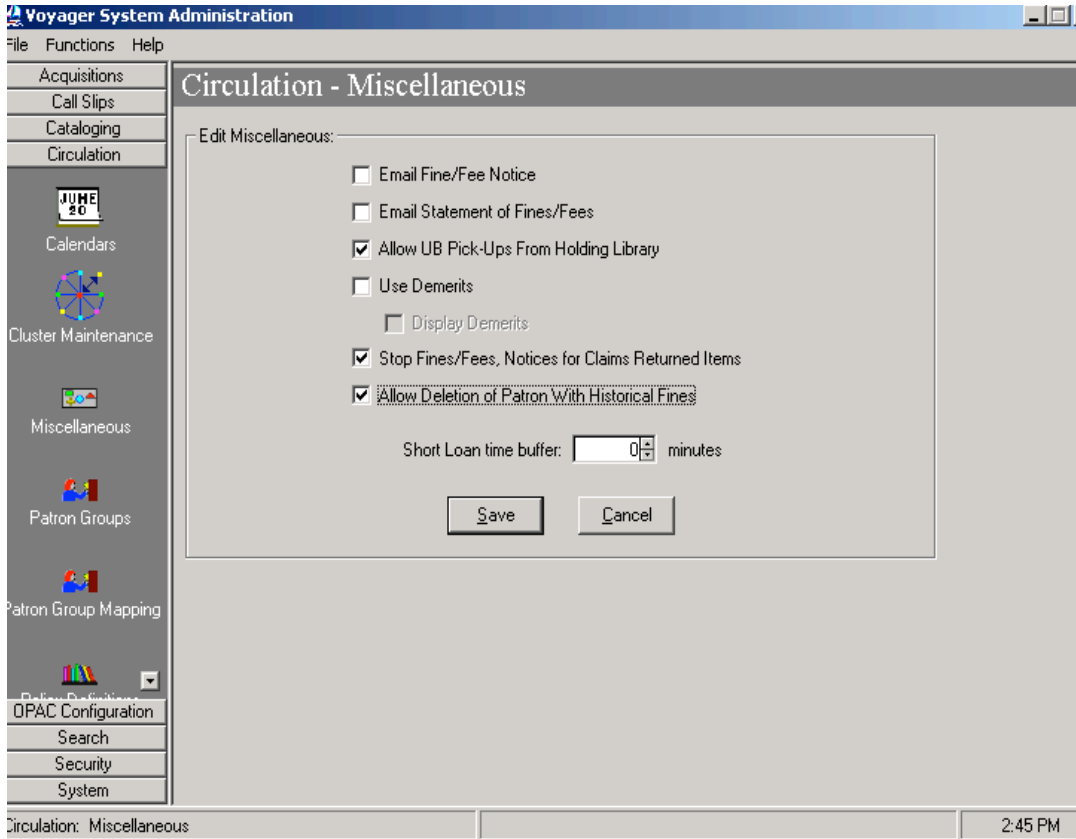


If this option is not enabled in SysAdmin, then the purge program does not delete patron records that have historical fines or fees.

If an individual patron record has both current (i.e., unpaid) and historical (i.e., 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 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 file are below, but in summary the log file shows which records would be deleted (or not deleted) when the job is run in production/delete mode. The output file will be placed in the library's xxxftp account on the files server (where xxx represents the library's three-letter I-Share abbreviation).

Library staff should review the output file 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 file from the production run will also be placed in the library's xxxftp account on the files server.

**Patron Record Purge Log File**

When Patron Record Purge is run in either test or production/delete mode, the system creates many output files. The only one that is particularly useful to library staff is the main log file, and it is copied into the library's xxxftp account.

The log file begins with the text "patron.purge.log" and ends 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:

patron.purge.log.20111009132611

The log file 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 are repeated on a separate line for each exception. The file is a pipe-delimited text file, which enables it to be more easily imported into Excel to allow for different sort options.

Log file example (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
```

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/Names

| Name | Exception |
|------|-----------|
| itemscharged | current charged items |
| holdrecall | current hold/recall |
| finesfees | 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<br>**NOTE:**<br>If global parameter, **Delete Patrons with Historical Fines**,<br>is set to **Y**, patron records with historical fines/fees **are** eligible for deletion. |
| sqlerror | SQL Error |

**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, Library Director, or their designate must file a WRO to initiate this process. General information about WRO is available from <http://www.carli.illinois.edu/mem-serv/wro.html>.