

The webinar will be recorded and posted on the CARLI website.

To ask a question, type in the chat box.

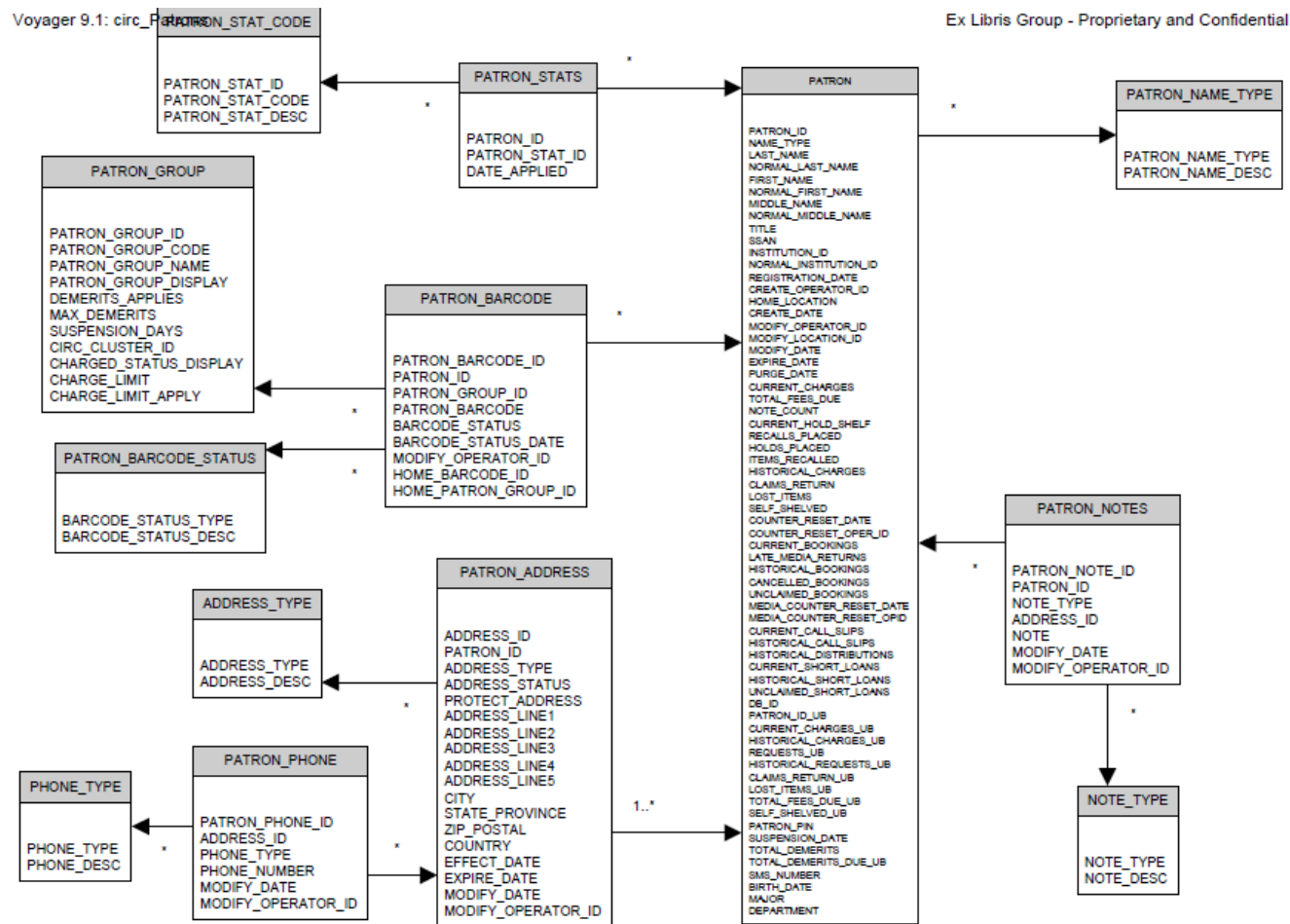
The session will run about 30-45 minutes, including time after for Q&A.

We will begin at 12:30 p.m.

Agenda

- Welcome
- Finding and Managing Patron Data
 - Address data
 - Barcodes & Patron Groups
 - Expire & Purge Dates
- Open Q&A





Ex Libris set of Voyager 9.1 Class Diagrams, p. 23

<https://www.carli.illinois.edu/sites/files/i-share/documentation/secure/Voyager%209.1%20Class%20Diagrams.pdf>

Patrons must have a permanent address

- Required by Voyager
 - Permanent address: address_type = '1'
- Temp/email addresses are optional
 - Temp address: address_type = '2'
 - Email address: address_type = '3'
 - Each has effective dates, allowing more than one of each
- Query choices:
 - Retrieve patron in multiple rows with multiple addresses
 - Retrieve one address per row
 - Retrieve a patron with two or three addresses in one row

Physical address maintenance: check for query on “Patron Address Zip Code is null”

Email address maintenance: check for queries on “Bad email address” and “Patron Records with Duplicate Email Addresses.”

patron_perm_address

```
SELECT PATRON_ADDRESS.ADDRESS_ID, PATRON_ADDRESS.PATRON_ID,
ADDRESS_TYPE.ADDRESS_DESC, PATRON_ADDRESS.ADDRESS_LINE1,
PATRON_ADDRESS.ADDRESS_LINE2, PATRON_ADDRESS.CITY,
PATRON_ADDRESS.STATE_PROVINCE, PATRON_ADDRESS.ZIP_POSTAL
FROM PATRON_ADDRESS INNER JOIN ADDRESS_TYPE ON
PATRON_ADDRESS.ADDRESS_TYPE = ADDRESS_TYPE.ADDRESS_TYPE
WHERE (((PATRON_ADDRESS.ADDRESS_TYPE)=1));
```

patron_email_address

```
SELECT PATRON_ADDRESS.ADDRESS_ID, PATRON_ADDRESS.PATRON_ID,
ADDRESS_TYPE.ADDRESS_DESC AS EmailAddDesc,
PATRON_ADDRESS.ADDRESS_LINE1 AS EmailAddress
FROM PATRON_ADDRESS INNER JOIN ADDRESS_TYPE ON
PATRON_ADDRESS.ADDRESS_TYPE = ADDRESS_TYPE.ADDRESS_TYPE
WHERE (((PATRON_ADDRESS.ADDRESS_TYPE)=3));
```

A patron should have only one active barcode (and one active patron group)

– Voyager allows multiple barcodes and multiple groups

- Ideally, each barcode is unique
- And, only one should be Active

– Barcode Status

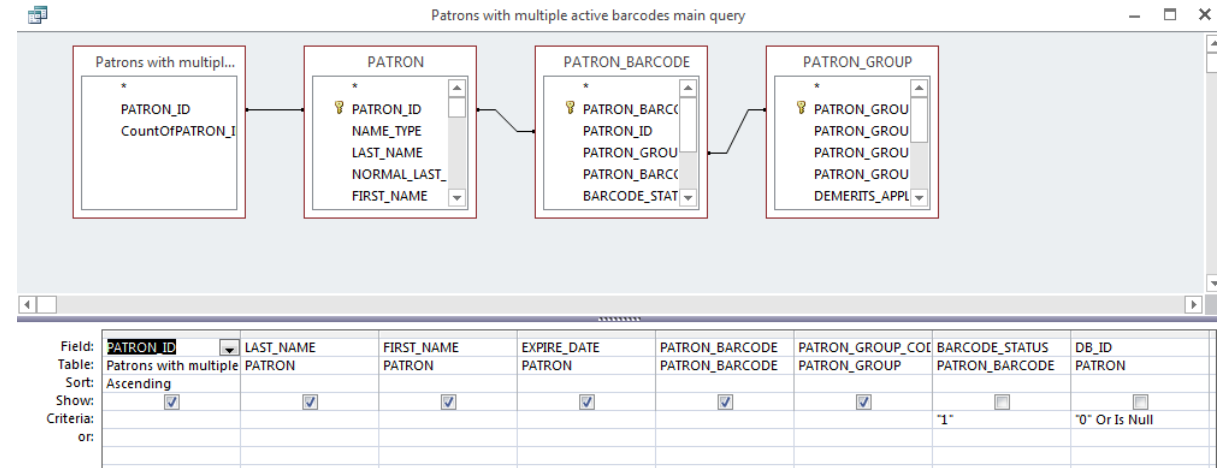
- » 1 = Active
- » 2 = Lost
- » 3 = Stolen
- » 4 = Expired
- » 5 = Other

– If not, then ☹️

☹️ If I find many of these, how do I correct them in bulk?

😊 1. Request a patron purge of all expired records (leaves less to clean-up)

😊 2. Export records with issues, clean up in patron sif, then reload with Patron Load.



Patrons with Multiple Active Barcodes

- Subquery counts active barcodes per patron_id
- Query features the “patron backbone,”
PATRON – PATRON_BARCODE – PATRON_GROUP

Circ 39: Patron Purge (WRO)

- Deletes all¹ eligible patron records
 - Use either expire_date or purge_date
 - You choose the date, e.g., 2017-06-30

Not deleted

- Patrons associated with current circ activity²
- Records with no date entered

Patron records *should* include both:

- expire_date & purge_date
- Could be empty if entered manually.

1. Date is the only criteria. Records cannot be purged based on patron group.
2. Current circ activity in this context includes active charges, fines, holds, for local and UB transactions. **Notes or blocks will not protect a patron.** Historical fines may also protect a patron (SysAdmin > Circulation > Miscellaneous > Allow Deletion of Patron with Historical Fines).

Count of Patrons by purge_date

PATRON

*

- 🔑 PATRON_ID
- NAME_TYPE
- LAST_NAME
- NORMAL_LAST_
- FIRST_NAME

Field:	PurgeDate: Year([purge_date]) & '-' & Month([purge_date]) & '-' & Day([purge_date])	PATRON_ID	
Table:		PATRON	
Total:	Group By	Count	
Sort:			
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Criteria:			
or:			

Count of Patrons by purge_date

```
SELECT Year([purge_date]) & '-' & Month([purge_date]) & '-' & Day([purge_date]) AS
PurgeDate, Count(PATRON.PATRON_ID) AS CountOfPATRON_ID
FROM PATRON
GROUP BY Year([purge_date]) & '-' & Month([purge_date]) & '-' & Day([purge_date]);
```

Local Circulation Maintenance

- <http://go.illinois.edu/SQLcircmaint>

Any questions on today's topics?

What would you like to see or discuss?

Any help that you would like now?

Upcoming Reports News

- CARLI_Reports_2017.mdb
 - New shared queries
 - Corrections to 2016 queries
 - Corrections to Conspectus 2009 table
- Do you have a reports tip or trick to present?
 - Visualization? OpenRefine? Other?

Mini-Webinar Archive Page

- Recorded sessions, SQL & slides
- Future topics
- <http://go.illinois.edu/ReportsWebinars>

Mini-Webinar Archive Page: https://www.carli.illinois.edu/products-services/i-share/reports/reports_webinars

Thanks for your time!