



Patron Record Delete Process

Patron records can be deleted **manually** or you can specify criteria where patron records are **automatically** deleted each month. With either method, you can specify blocks that prevent certain records from being deleted.

Polaris can be set to automatically delete patron records that have been inactive for a specified number of days. If Polaris is set to automatically delete **unblocked** records that meet the criteria, you can choose to place any **blocked** records that meets the criteria in an exceptions record set. The record set has to be set up in advance (see instructions below), and should be reviewed regularly. After review, some records may be edited and retained.

If you do not want **any** records (blocked or unblocked) to be deleted immediately, you can choose to place **all** records that are candidates for deletion in a record set where they can be reviewed. After review, some records may be edited and retained, while others may be manually deleted from within the record set (see instructions below).

Records that are blocked from automatic deletion, whether placed in a record set or not, are deleted automatically when the circumstances that prevented deletion no longer exist. System-assigned circulation blocks **prevent** automatic deletion. Library-assigned or free-text circulation blocks **do not prevent** automatic deletion.

Once you decide the criteria that affect both manual and automatic deletion of your patron records, and at what level you prefer – **library or branch**, system staff will set that criteria for you.

NOTE:

- Automatic deletions based on expiration date is **not** an option at this time.
- Certain patron account data from deleted patron records is saved in separate database tables for a period of three years. If an associated item record is also deleted, the item record ID, barcode, title, author and material type are retained. This process insures the accuracy in the following reports:
 - o Daily Cash Balance Detail
 - o Daily Cash Drawer
 - o Daily Cash Drawer POS
 - o Bill Patrons
 - o Fines and Fees

- o Fines and Fees Summary
- o Non-POS Payments

Once that three year period is exceeded, the saved data is purged.

Creating a New Patron Record Set –

In order to review patron records (exceptions) that are candidates for purging, a record set must be created first.

To create a patron record set for exceptions, from the Polaris Shortcut Bar:

- Select **File, New**; the New dialog box appears.
- Select **Record Set** from the Objects list, and click **OK**; the New Record Set dialog box appears.
- Select **Patron** as the record type in the Record Type box, and click **OK**; an empty New Record Set work-form appears.
- Type a name for the record set in the Name box; be sure to name it something you can easily remember and find for regular reviewing of patron records (i.e. **XXXX Patron Delete Exceptions** – where XXXX is your location's four letter code). The name must also be given to system staff when they set your criteria for the patron deletion process. Any future changes to the record set name **must** be reported to system staff for them to update, otherwise your patron records will not be saved to any exception file for reviewing. That information will be lost.
- Specify a person or library as the record set owner in the Owner box. Only the owner can modify the record set. If the owner is an organization, only the organization's staff members can modify the record set **if** they have the appropriate permissions.
- Type notes in the Note box (optional).
- Select **File, Save**, press **CTRL+S**, or click on the **Save** icon.

Reviewing and Editing the Record Set –

From the Polaris Shortcut Bar:

- Click on **Patron Services, Record Sets**; a search box appears.
- The default Search by: is Name; type the name of your exceptions record set in the For: window; click on the **Search** bar.
- Once your record set appears, double-click on it to list all the patrons in the set.
- There is a limit of how many patron records will display; to display all records in the set press **Ctrl+Shift+A**.
- Double-click on each individual patron you want to review and/or edit.
- For those patrons with blocks that you **do** want deleted from the database, you will have to resolve the blocks first.

- Once the blocks have been resolved, select the record or records from the list; select **Tools, Delete Selected Records**, or right-click, select **Delete** and answer **Yes** when prompted to permanently delete record or records; select **File, Save** to save the changes to the record set. This not only deletes these patrons from the record set, but also from the database.
- For those patrons you determine you **do not** want deleted from the database, you will have to edit their patron records accordingly to ensure they are excluded from meeting your criteria for deletion, and remove them from this record set.
- To remove patrons from the record set, select the record or records in the list; select **Tools, Remove**. They will no longer appear in the list, but will remain in the database as individual records. Select **File, Save** to save the changes to the record set.

For those libraries that choose to participate in the automatic patron delete process –

- Create a patron record set for reviewing and editing of exception patron records.
- A form for specifying your criteria can be found on the Share website under the Forms tab - <http://share.illinoisheartland.org/?q=node/477>.
- Once the form has been completed and submitted, system staff will edit and save the parameters for your location.
- The patron delete process will be set to run once a month.
- Be sure to review your patron record set each month, editing records as needed.
- If you choose for this process to automatically delete unblocked patrons each month, the total number of patrons deleted will be reported on your monthly Statistical Summary. Be sure to generate the Statistical Summary report the first working day of each new month to get an accurate statistic for deleted patrons.