

Deleting Expired Patron Accounts

In order to protect patron information and report accurate data to stakeholders and the State Library, patron accounts that have been expired for three years should be deleted and purged from the Missouri Evergreen Consortium shared patron database. Each library is responsible for deleting accounts. The server host for the consortium will purge the deleted accounts.

Neither deleting nor purging patron accounts affects circulation statistics. If the item with barcode 123 circulated ten times in 2020 and you delete/purge the records of all ten patrons who checked it out in 2020, item 123 will still show ten circulations in 2020. You just won't know who the ten patrons were who checked it out.

Step One: Run a report to find expired accounts

1. In Reports > Shared Folders > Templates > equinox > General Templates from Equinox, find the report **Patron Accounts with Expiration Dates and Balance Owed (updated with balance less than or equal to with Group Lead field)**

The screenshot shows the library system interface. At the top, there is a navigation bar with a home icon and menu items: Search, Circulation, Cataloging, Acquisitions, Booking, and Administration. Below this is a search bar for templates with a text input field, a dropdown for 'All Fields', a dropdown for 'All Folders', and a 'Go' button. On the left, there are two tree views: 'My Folders' and 'Shared Folders'. 'My Folders' contains Templates, Reports, and Output. 'Shared Folders' contains a hierarchy of folders, with 'equinox' expanded to show 'General Templates From Equinox (ME)' selected. On the right, there is a report selection table with a 'Limit output to' dropdown set to 10 and 'Start', 'Prev', and 'Next' links. The table has a 'Select' column with radio buttons and a 'name' column. The report 'Patron Accounts with Expiration Dates and Balance Owed (updated with balance less than or equal to with Group Lead field)' is selected with a checked radio button.

Select	All	None	name
<input type="checkbox"/>			Count Active Patrons by Statistical Category
<input type="checkbox"/>			Item List with Circ Modifier (Equinox)
<input type="checkbox"/>			List (In)active Patrons by Active and Expiration Date without notes and Barre Patron Filter (equinox)
<input type="checkbox"/>			List Patrons with Outstanding Balances with Date Range (clone)
<input type="checkbox"/>			List Patrons with Outstanding Balances with Fine Interval (clone) (clone)
<input type="checkbox"/>			Patron Accounts with Expiration Dates
<input type="checkbox"/>			Patron Accounts with Expiration Dates and Balance Owed
<input checked="" type="checkbox"/>			Patron Accounts with Expiration Dates and Balance Owed (updated with balance less than or equal to with Group Lead field)
<input type="checkbox"/>			Patron Accounts with Expiration Dates and Balance Owed (updated with balance less than or equal to)
<input type="checkbox"/>			Patron Accounts with Expiration Dates and Balance Owed (updated)

2. Output will display these columns: Barcode, Name, Active, Privilege Expiration Date, Short (Policy) Name, which is the library name, and Is Group Lead Account.
3. Output will NOT include patrons whose accounts are Barred or already deleted.

4. You will be able to limit the output to include only patrons who owe less than a dollar amount that your library has decided is an acceptable threshold for deletion.
5. Output will show both Active and Inactive patron accounts. Active will be designated with the numeral 1 in the Active column. Inactive will be designated with the numeral 0 in the Active column.
6. Output will also show which patrons are a Group Lead Account. Group Leads will be designated with the numeral 1 in the Is Group Lead Account column. Non Group Lead accounts will be designated with the numeral 0 in the Is Group Lead Account column.

Column	Transform	Action	User Params
ILS User -> Privilege Expiration Date	Date	Between	Real Date [calendar icon] [red box] - And - Real Date [calendar icon] [red box]
User Summary -> balance_owed	Raw Data	Less than or equal to	[red box]
Organizational Unit -> Organizational Unit ID	Raw Data	In list	<div style="border: 1px solid gray; padding: 2px;"> <ul style="list-style-type: none"> SRL-BK SRL-GE SRL-HQ <p>Add Del</p> <div style="border: 1px solid gray; height: 20px; width: 100%;"></div> </div>
ILS User -> Barred	Raw Data	Equals	f
ILS User -> Is Deleted	Raw Data	Equals	f

7. **ILS User->Privilege Expiration Date**—Select 01/01/2000 as the beginning date and three years prior to today’s date (or three years prior to the last day of the previous month) as the end date.
8. **User Summary->balance_owed**—Enter the **maximum** amount a patron may owe for your library to be willing to delete the account.
9. **Organizational Unit**—Select your library.
10. **Barred** and **Deleted** are both already selected as False.

Step Two: Deleting the reported patron accounts

Barcodes from the report can be batch deleted using User Buckets. Copy the barcodes from the Excel output into a text document. Create a new User Bucket. Upload the saved text document to the bucket. Delete the accounts.

1. Highlight barcodes in the Excel sheet. It is best to not try to work with more than one thousand numbers at a time.

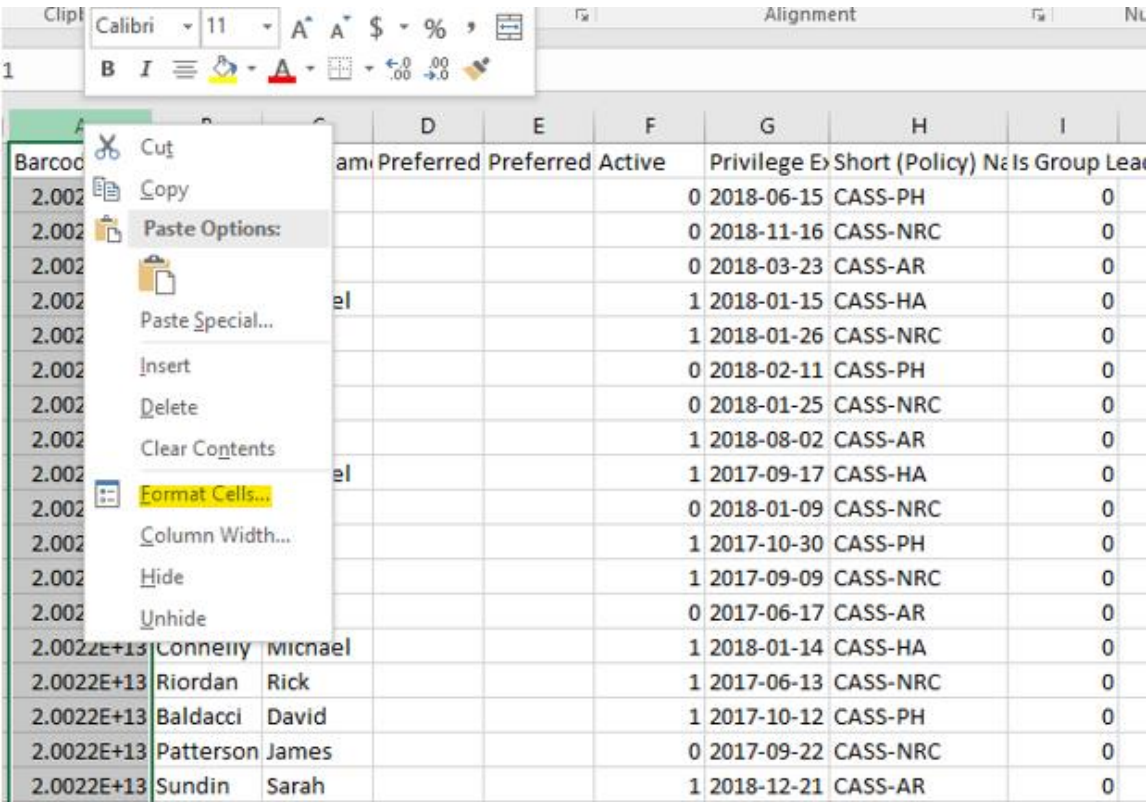
A	B	C	D	E	F	G	H	I	J
Barcode	Last Name	First Name	Preferred	Preferred	Active	Privilege Ex	Short (Policy) Name	Is Group Lead	Account
2002200010011	Baldacci	David			0	2018-06-15	CASS-PH	0	
2002200100012	Patterson	James			0	2018-11-16	CASS-NRC	0	
2002200100013	Sundin	Sarah			0	2018-03-23	CASS-AR	0	
2002200100014	Connelly	Michael			1	2018-01-15	CASS-HA	0	
2002200100015	Riordan	Rick			1	2018-01-26	CASS-NRC	0	

If the barcodes are too long to appear in their entirety in the spreadsheet even after widening the column, follow these steps to change their format **before** saving them to a text document.

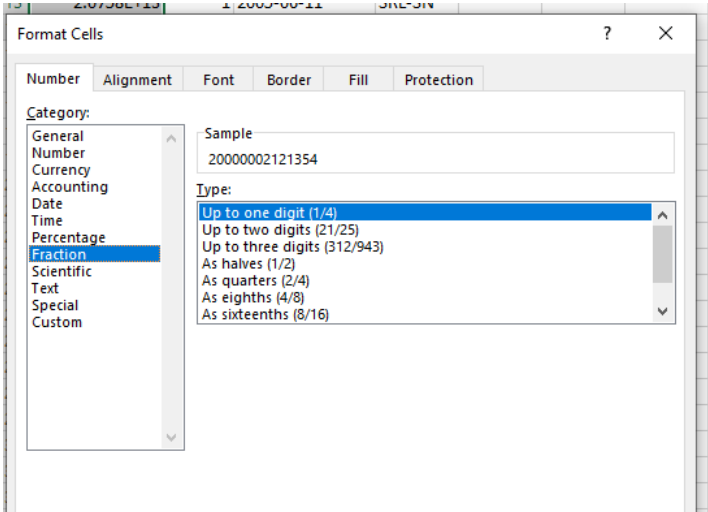
- a. Right click on the A at the top of the column of barcodes.

A	B	C	D	E	F	G	H	I	J
Barcode	Last Name	First Name	Preferred	Preferred	Active	Privilege Ex	Short (Policy) Name	Is Group Lead	Account
2E+13	Baldacci	David			0	2018-06-15	CASS-PH	0	
2E+12	Patterson	James			0	2018-11-16	CASS-NRC	0	
2E+13	Sundin	Sarah			0	2018-03-23	CASS-AR	0	
2E+13	Connelly	Michael			1	2018-01-15	CASS-HA	0	
2E+13	Riordan	Rick			1	2018-01-26	CASS-NRC	0	

b. From the resulting menu, left click on **Format Cells**.



c. From the resulting menu, select Fraction > Up to one digit > Okay.

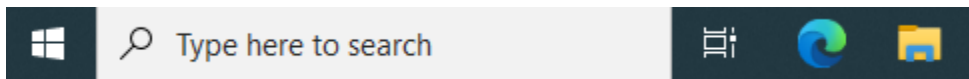


d. Now the numbers are rational. If what you see is #####, make the column wider.

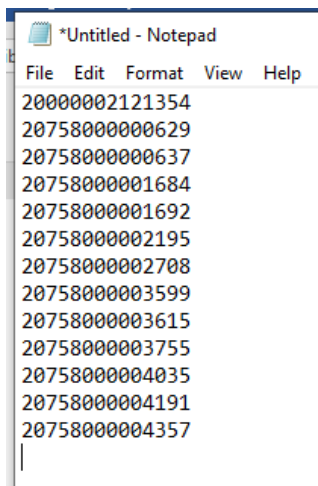
A	B	C	D	E	F	G	H	I
Barcode	Last Name	First Name	Preferred	Preferred	Active	Privilege Ex	Short (Policy) Name	Is Group Lead
2002200010011	Baldacci	David			0	2018-06-15	CASS-PH	0
2002200100012	Patterson	James			0	2018-11-16	CASS-NRC	0
2002200100013	Sundin	Sarah			0	2018-03-23	CASS-AR	0
2002200100014	Connolly	Michael			1	2018-01-15	CASS-HA	0
2002200100015	Riordan	Rick			1	2018-01-26	CASS-NRC	0

2. After highlighting up to one thousand barcodes, right click on the grayed area. Select Copy from the resulting menu. (The menu is the same as shown on page 4. You can see that Copy is the second option in the menu.)

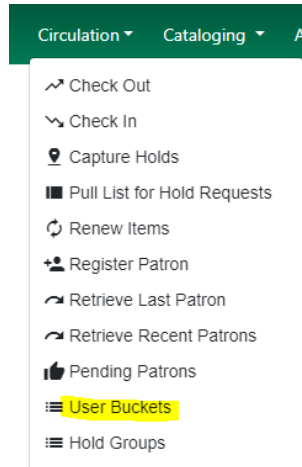
3. In the Search field at the bottom of your computer screen, enter Notepad.



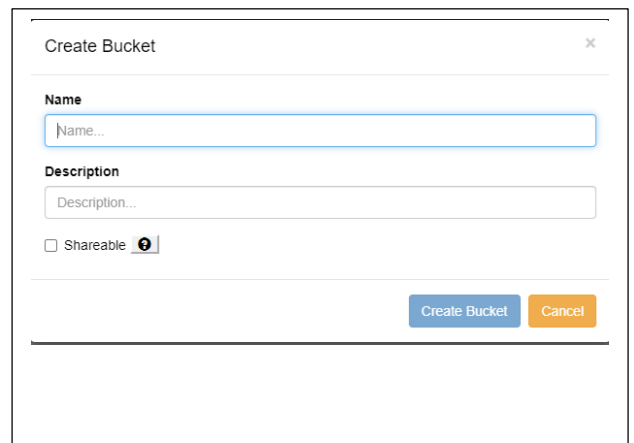
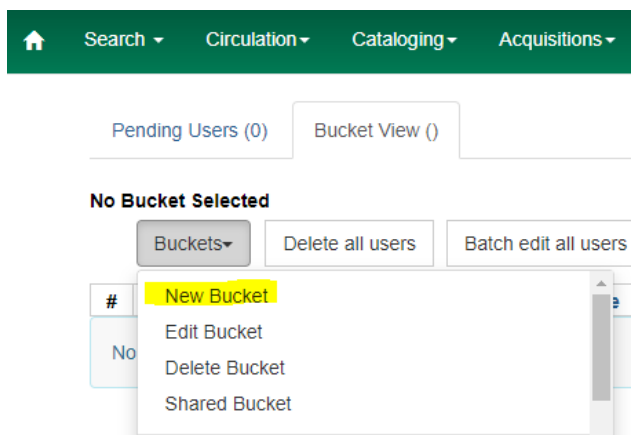
4. In the blank Notepad document, right click again and select Paste from the menu. The barcodes will populate the document.



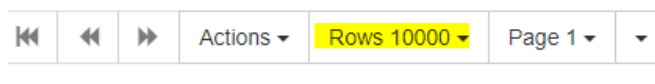
5. Save the document to your desktop or somewhere it won't be lost. This document will be uploaded to a User Bucket from which all of the records can be deleted in a batch.
6. In the Evergreen Circulation menu, open User Buckets.



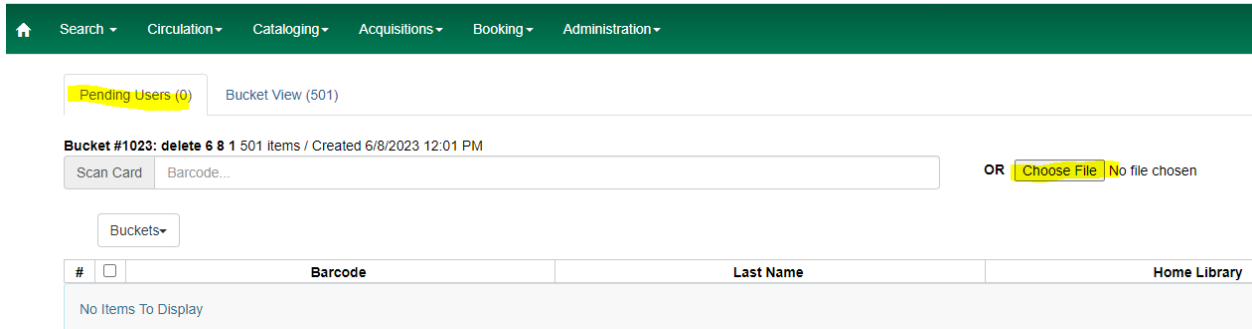
7. From Buckets, select New Bucket, name your bucket, and click Create Bucket.



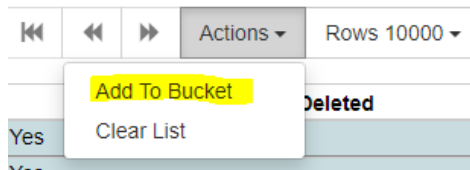
8. Click Pending Users. Make sure the row count is large enough to accommodate the size of your file before uploading the saved file.



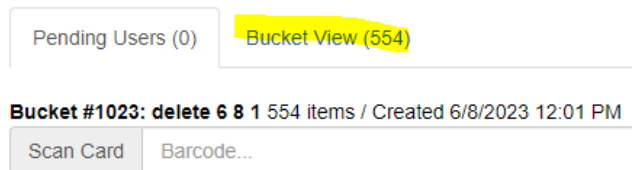
9. Click Choose File and select the text document that you saved in step 5.



10. The Pending Users records need to be put in the bucket. Select all the records listed in the Pending Users list. Open the Actions menu and select Add to Bucket.



11. Now the Pending Users file shows 0 and the Bucket View contains all of the records. Click on Bucket View to open the bucket.



12. Select all of the records and click the Delete All Users button.

Pending Users (0) Bucket View (554)

Bucket #1023: delete 6 8 1 554 items / Created 6/8/2023 12:01 PM

Buckets ▾ **Delete all users** Batch edit all users

#	<input checked="" type="checkbox"/>	Barcode	First Name
1	<input checked="" type="checkbox"/>	9301161281	BRITTANY
2	<input checked="" type="checkbox"/>	9301137860	LINDSEY
3	<input checked="" type="checkbox"/>	930116759+	MARY

Deleted patron records will still appear in patron reports unless the report is designed to filter deleted records. The information is retrievable. Only purging the records completely removes them from the ILS. We are able to purge accounts one at a time through the Other menu in the patron record. Only our server host can purge records in a batch. They will purge our records once a year before the annual upgrade.