

Deleting Expired Patron Accounts

In order to protect patron information and ensure accurate reporting to stakeholders and the State Library, patron accounts that have been expired for three (3) years should be deleted and purged from the Missouri Evergreen Consortium's shared patron database. Each library is responsible for deleting its own expired accounts. The server host for the consortium will purge the deleted accounts.

Deleting or purging patron accounts does not affect circulation statistics. For example, if an item with barcode 123 circulated ten times in 2024, and you later delete or purge the records of all ten patrons who checked it out, item 123 will still show ten circulations for 2024. You simply will no longer be able to identify which patrons checked it out.

Step One: Run a report to find expired accounts

1. In the Reports module > Shared Folders > Templates > equinox > General Templates from Equinox (ME), 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 'Evergreen Reports' interface. On the left, there is a sidebar with 'My Folders' and 'Shared Folders'. Under 'Shared Folders', the 'equinox' folder is expanded, showing sub-folders like 'Delany templates (ME)', 'ESI Shared (ME)', 'EquinoxShared (ME)', 'James Memorial (ME)', 'MEC System Specific Reports (ME)', and 'Reynolds (ME)'. The 'General Templates From Equinox (ME)' folder is selected. The main area displays a list of reports under the heading 'General Templates From Equinox'. A table lists 9 reports. The 9th 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 checkbox. The table columns are '#', 'Name', and 'Description'. The selected report's description is: 'Fields: Patron Home Library, Barcode, Active, Expiration Date Filters: Patron Home Library (in List), Expiration Date (Real Date, Between), Balance Owed (Less Than or Equal to), Barred = False, Deleted = False'.

#	Name	Description
1	Count Active Patrons by Statistical Category	Counts by library and permission group. Filters include Home Library, Permission Group, Is Deleted, and Statistical Category.
2	Item List with Circ Modifier (Equinox)	
3	List (In)active Patrons by Active and Expiration Date without notes and Barred Patron Filter (equinox)	Displays patron barcode, home library, expiration date, note, alert message, balance owed, and active. Filters by home library and active and expiration date. Added barred patron filter
4	List Patrons with Outstanding Balances with Date Range (clone)	Displays patron information with total of balance owed. Filtered by patrons home library, balance owed, date range, and library.
5	List Patrons with Outstanding Balances with Fine Interval (clone) (clone) (clone)	Displays patron information with total of balance owed. Filtered by patrons home library and balance owed.
6	Monthly test Circulated Lost Items between libs	Patron Home Library, Item Owning Library, Patron Barcode, Item Barcode, Checkout Date, Checkin Date (if any), Item Price, Total Bill, Total Paid. Keep in mind that total paid is inaccurate. If there is a value, it means that the patron paid "some amount" but not "the amount" showing on the report.
7	Patron Accounts with Expiration Dates	Fields: Patron Home Library, Barcode, Active, Expiration Date Filters: Patron Home Library (in List), Expiration Date (Real Date, Between), Balance Owed = 0.00, Barred = False, Deleted = False
8	Patron Accounts with Expiration Dates and Balance Owed	Fields: Patron Home Library, Barcode, Active, Expiration Date Filters: Patron Home Library (in List), Expiration Date (Real Date, Between), Balance Owed (Less Than or Equal to), Barred = False, Deleted = False
9	Patron Accounts with Expiration Dates and Balance Owed (updated with balance less than or equal to with Group Lead field)	Fields: Patron Home Library, Barcode, Active, Expiration Date Filters: Patron Home Library (in List), Expiration Date (Real Date, Between), Balance Owed (Less Than or Equal to), Barred = False, Deleted = False

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.

The screenshot displays a query builder interface with the following configuration:

- Privilege Expiration Date:** Operator: Between; Filter value: Relative time value (checked), with date pickers for start and end dates; Transform: Date.
- Barred:** Operator: Equals; Filter value: False; Transform: Raw Data.
- Is Deleted:** Operator: Equals; Filter value: False; Transform: Raw Data.
- balance_owed:** Operator: Less Than or Equal to; Filter value: (empty); Transform: Raw Data.
- Organizational Unit ID:** Operator: In List; Filter value: Filter (dropdown menu open showing a list of library units); Transform: Raw Data.

7. **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. **Barred** and **Deleted** are both already selected as False.
9. **Balance_owed**—Enter the **maximum** amount a patron may owe for your library to be willing to delete the account.
10. **Organizational Unit ID**—Select your library.

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 file, then create a new User Bucket and upload the saved file. Once uploaded, delete the accounts from the bucket.

To help prevent possible system slowdowns, consider sending any **staff accounts** that need to be deleted to Equinox, deleting smaller numbers of patrons at a time and, if possible, scheduling **patron account deletions** during off-peak times.

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

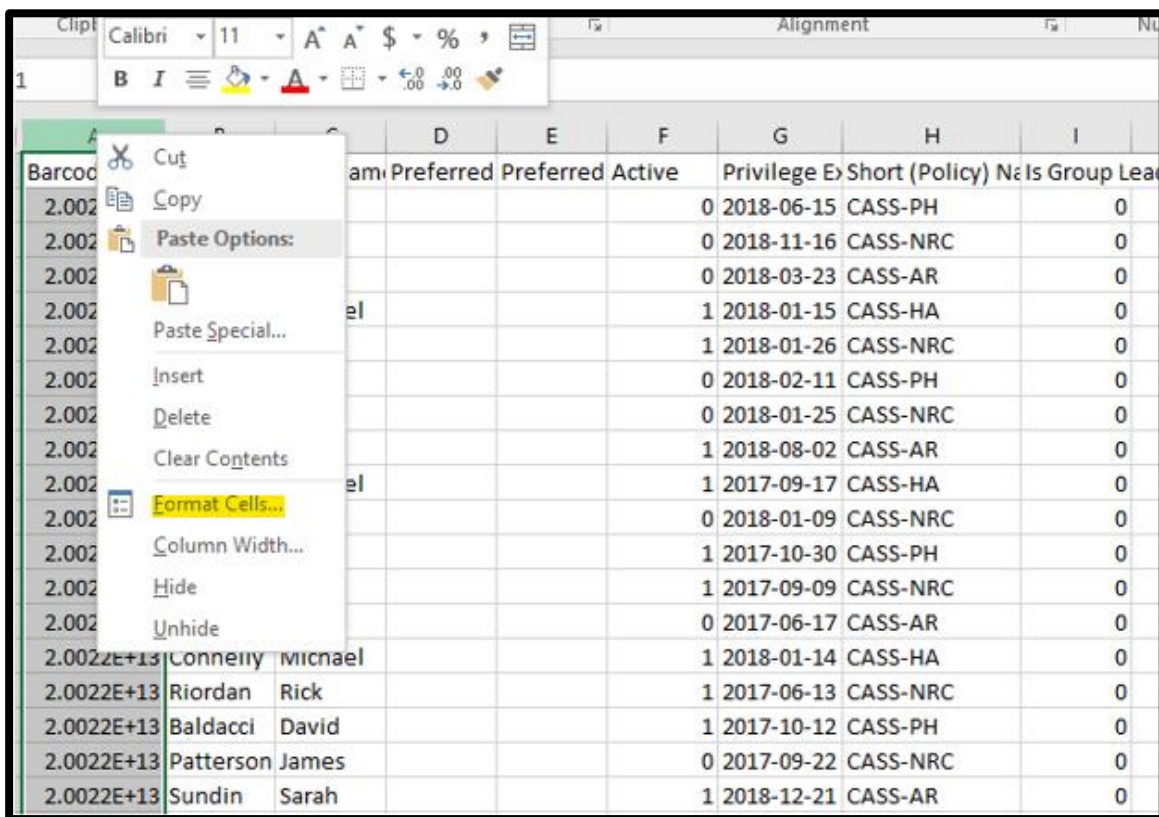
A	B	C	D	E	F	G	H	I	J
Barcode	Last Name	First Name	Preferred	Preferred	Active	Privilege Ex	Short (Policy) Na	Is Group Lead	Account
2002200010011	Baldacci	David			0	2018-06-15	CASS-PH	0	
2002200100012	Patterson	James			0	2018-11-16	CASS-NRC	0	
2002200100013	Sundin	Sarah			0	2018-03-23	CASS-AR	0	
2002200100014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

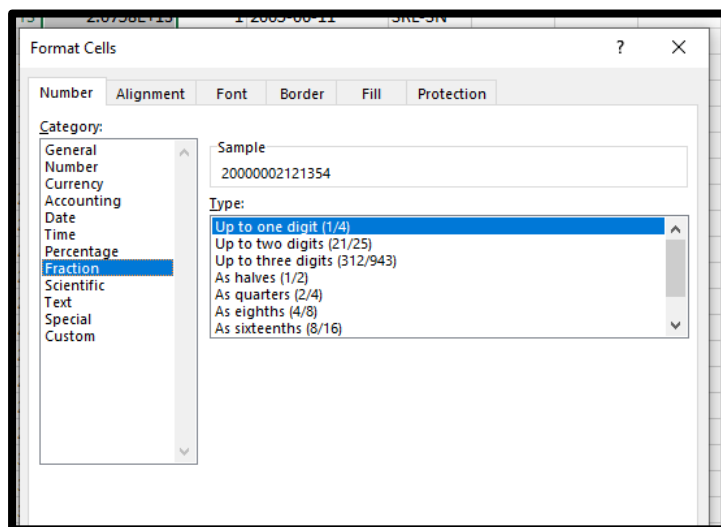
- a. Right click on the A at the top of the column of barcodes.

A	B	C	D	E	F	G	H	I	J
Barcode	Last Name	First Name	Preferred	Preferred	Active	Privilege Ex	Short (Policy) Na	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**.



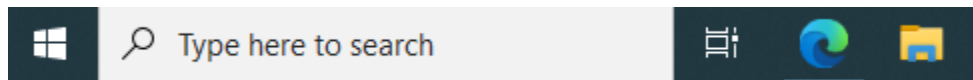
c. From the resulting menu, select Fraction > Up to one digit > Okay.



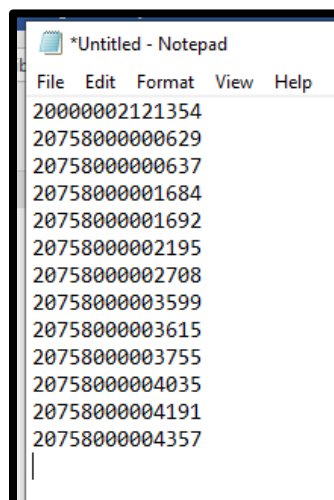
d. Now the numbers are rational. If what you see is ####, make the column wider.

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
2002200100011	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

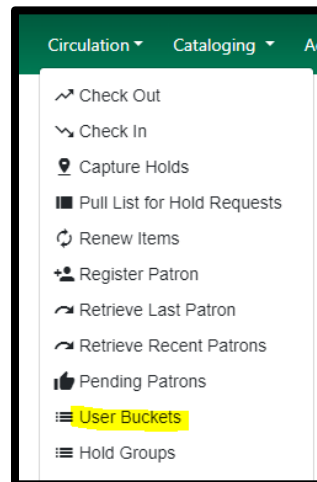
- After highlighting up to one thousand barcodes, right click on the grayed area. Select Copy from the resulting menu. (The menu is the same as shown on page 4. You can see that Copy is the second option in the menu.)
- In the Search field at the bottom of your computer screen, enter Notepad.



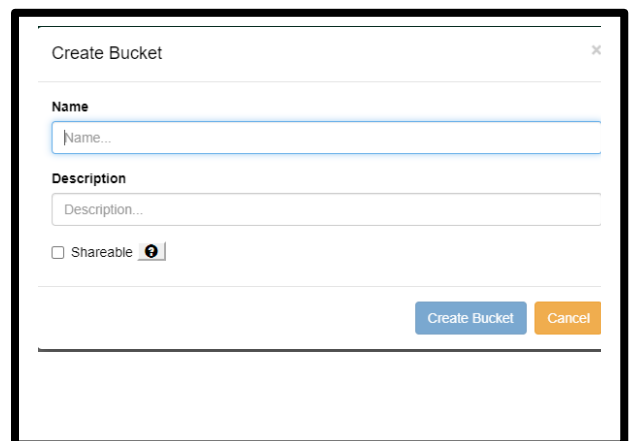
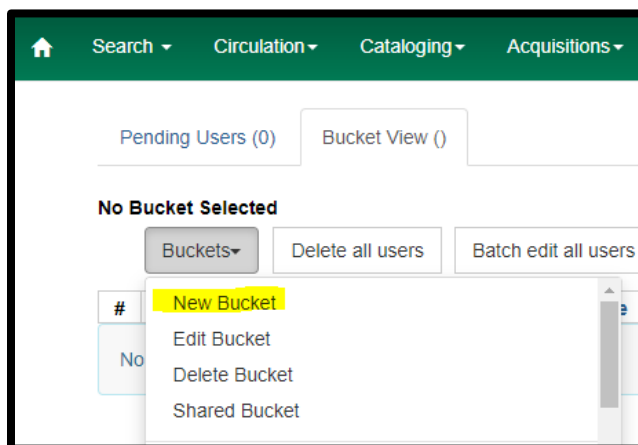
- In the blank Notepad document, right click again and select Paste from the menu. The barcodes will populate the document.



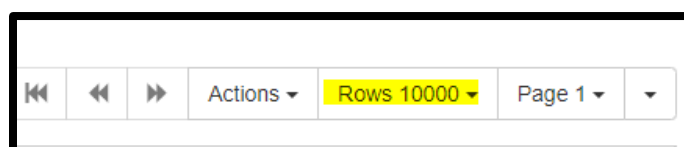
5. Save the document to your desktop or somewhere it won't be lost. This document will be uploaded to a User Bucket from which all of the records can be deleted in a batch.
6. In the Evergreen Circulation menu, open User Buckets.



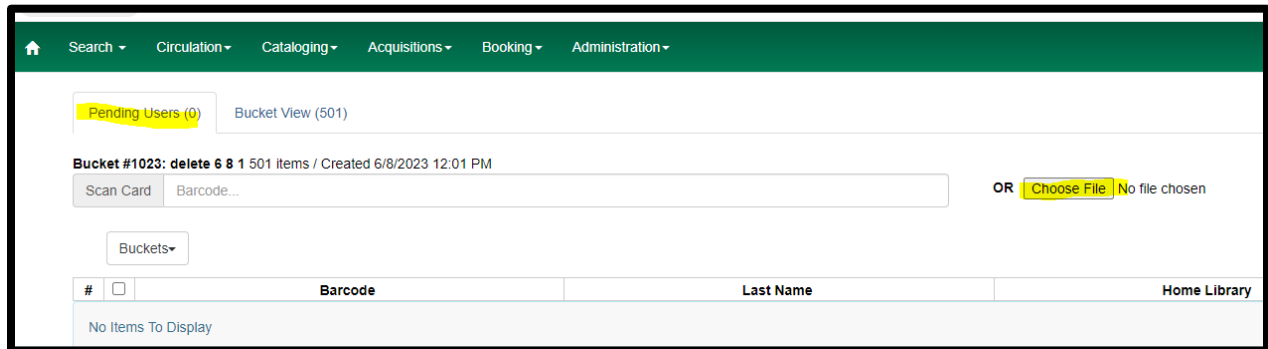
7. From Buckets, select New Bucket, name your bucket, and click Create Bucket.



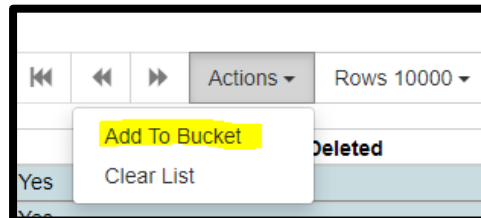
8. Click Pending Users. Make sure the row count is large enough to accommodate the size of your file before uploading the saved file.



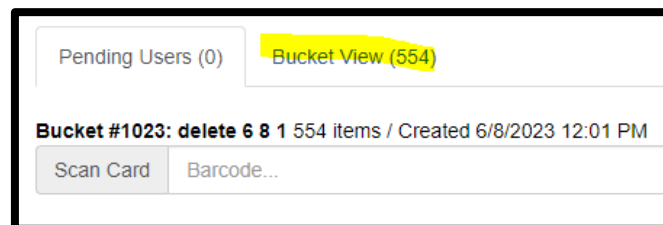
9. Click Choose File and select the text document that you saved in step 5.



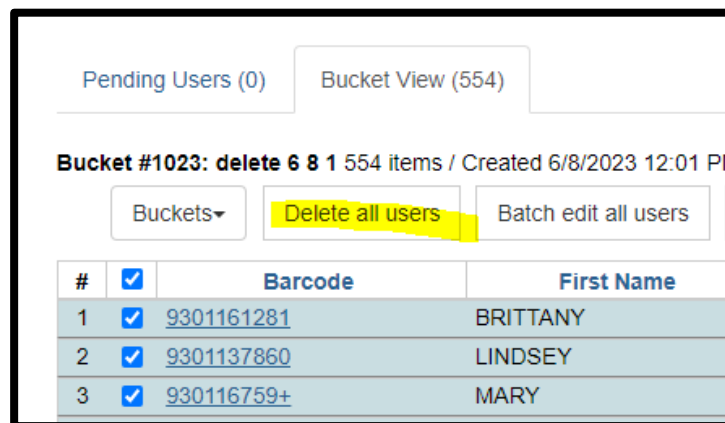
10. The Pending Users records need to be put in the bucket. Select all the records listed in the Pending Users list. Open the Actions menu and select Add to Bucket.



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.



The screenshot shows a web interface for managing user buckets. At the top, there are two tabs: 'Pending Users (0)' and 'Bucket View (554)'. Below the tabs, a header for 'Bucket #1023' indicates 'delete 6 8 1 554 items' and 'Created 6/8/2023 12:01 PM'. There are three buttons: 'Buckets▼', 'Delete all users' (highlighted in yellow), and 'Batch edit all users'. Below the buttons is a table with three columns: '#', 'Barcode', and 'First Name'. The table contains three rows of user data, each with a checked checkbox in the first column.

#	<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 reports unless the report is specifically designed to filter them out. These records remain retrievable until they are purged by the server host. Only purging permanently removes them from the ILS.

Individual accounts can be purged manually through the **Other** menu in the patron record. However, only the server host can perform batch purges. They carry out this process once a year, prior to the annual upgrade.