2018 SWAN Patron Record Purge

The 2018 Patron Record Purge is upon us. We will be using IPLAR recommended guidelines as the purge criteria:

If your library **expires** patron library cards SWAN will purge your patron records with an expiration date before 01/01/2015. The last activity date in these patron records has **no** bearing on the purge.

If you **do not expire** patron library cards SWAN will purge your patron records with a last activity date before 01/01/2015.

Things to keep in mind in preparation for the purge:

1. Records that have a status of BARRED but meet the purge criteria **will** be purged
2. Records with ANY checkouts (ACTIVE or INACTIVE), bills (including OVERDUE), and/or holds **will not** be purged.

How to Prepare for the purge:

1. SWAN will no longer provide patron record lists associated with the purge. If you are interested in finding out who will or will not be purged we have created reports in BLUEcloud Analytics (BCA) that will list patron records. You can find the directions to run these reports at the end of this document. There are 3 separate reports; they list patron records that:

    a. Have a status of OK and **will** be included in the purge

    b. Have a status of BARRED and **will** be included in the purge – we have included the Note fields in this report to help you determine why the patron record is BARRED

    c. Would be included in the purge if they didn't have bills

2. Decide if you would like to have bills under a certain amount removed from patron records to allow them to be purged.

3. Decide if you do not want to include your BARRED patron records in the purge. If most of your records have a note of "Please verify address due to the migration" or other "verify" notes and you only have a few records that are BARRED for a different reason we recommend you alter the expiration dates of the few records so they are not included in the purge and allow us to purge the BARRED records with verify notes.

4. Open a ticket by logging into the Help Desk or send an email to help@swanlibrarie.net. Please answer the following questions in your ticket:

    1. Does your library expire library cards?
        a. If you do not expire cards and use NEVER would you like us to update all your patron records to NEVER?
    2. Would you like us to remove bills below a certain threshold?
        a. If yes, what is that threshold?
    3. Would you like us to ignore user records with a status of BARRED?

If we do not receive a ticket from your library by Friday February 9, 2018 we will run your purge with no exceptions.

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How to run Patron Record Purge reports in BCA

We will not provide patron lists for the purge. If you would like a list of patron records please see the following directions. They are broken down into two folders, one for libraries that expire their patron library cards and one for libraries that do not expire their patron library cards. Please see the appropriate folder to ensure accurate data. For either set of reports start out in BCA SWANLIBS folder, click on the Shared Reports folder, click on the SWAN Reports folder, click on the Patron Record Purge folder then select the folder that applies to your library.

Library Cards that Expire

For a list of OK patron user records that meet the purge criteria, run the BLUEcloud Analytics (BCA) report List User Records Expired Before 1-1-2015 to be Purged. Select your library from the list; then click the Run Report button at the bottom of the screen.

For a list of BARRED patron user records that meet the purge criteria, run the BCA report List BARRED User Records Expired before 1-1-2015 with Notes. Select your library from the list; then click the Run Report button at the bottom of the screen.

For a list of Delinquent patron user records that meet the purge criteria but have bills which will block them from being removed, please run the BCA report List User Records Expired before 1-1-2015 With Bills. Select your library from the list; then click the Run Report button at the bottom of the screen.

Library Cards with NEVER Expiration Dates

For a list of OK patron user records that meet the purge criteria, run the BLUEcloud Analytics (BCA) report List User Records Last Activity Date Before 1-1-2015 to be Purged. Select your library from the list; then click the Run Report button at the bottom of the screen.

For a list of BARRED patron user records that meet the purge criteria, run the BCA report List BARRED User Records Last Activity Date Before 1-1-2015 With Notes. Select your library from the list; then click the Run Report button at the bottom of the screen.

For a list of Delinquent patron user records that meet the purge criteria but have bills which will block them from being removed, please run the BCA report List User Records Last Activity Date Before 1-1-2015 With Bills. Select your library from the list; then click the Run Report button at the bottom of the screen.