Cleaning Up Student Patron Records: Global Updates and Deletes in Destiny

Note: eSIS and other student information systems updates DO NOT remove student records. Building or district staff is responsible to do so based on local policies.

Clean Up by Card Expiration Date

Patron data being imported from student information systems is updated annually with a new Card Expiration Date. For example, in August 2010, student data included the date of 6/30/2011. Students that did not return to the same districts in September 2010 but had attended previously have earlier expiration dates. Staff and Community records will have to be updated first to keep from deleting them.

I. Steps to Change Staff/Community/Etc. Records
   1. Go to Back Office - Update Patrons – Update
   2. Choose Update Patrons Based on Global Criteria (dropdown list)
   3. Use the dropdown lists to say
      For every patron.... whose Patron Type is Faculty
      Change Card Expiration Date to 6/30/20XX (next June)
   4. Click on Update
   5. Refresh the list in the Job Manager and view it to determine that you updated the correct records.
   6. Repeat steps 2-4 for each Patron Type you have for staff and community.

II. Change Patrons with Expired Cards to Inactive
   1. Go to Back Office - Update Patrons – Update
   2. Choose Update Patrons Based on Global Criteria (dropdown list)
   3. Use the dropdown lists and date picker to say
      For every patron... Whose Card Expiration Date is 1/1/2000 to 6/30/20XX (last June)
      Change Patron Status to Inactive
   4. Click on Update.
   5. Refresh the list in the Job Manager and view it to determine that you updated the correct records.

III. Delete Inactive Students
    1. Go to Back Office - Update Patrons –Delete
    2. Choose Delete Patrons Based on Global Criteria (from dropdown lists)
    3. Uncheck the box next to Allow patrons to be deleted even if they have outstanding transactions
    4. Use the dropdown lists to say
       For every patron... Whose Patron Status is Inactive
    5. Click on Delete All
    6. Refresh the list in the Job Manager and view the list of deleted and skipped patrons
    7. The skipped patrons owes materials or fines
**Clean Up by Graduation Year**

Patron data being imported from student information systems is contains the students’ graduation year.

**Steps to Delete by Graduation Date**

1. Go to Back Office - Update Patrons — Delete
2. Choose Delete Patrons Based on Global Criteria (from dropdown lists)
3. Based on Global Criteria
4. Uncheck the box next to Allow patrons to be deleted even if they have outstanding transactions
5. Use the dropdown lists to say
   Delete every patron... Whose Graduation Year is 20XX (last graduation year) ...and Patron Type is Student
6. Click on Delete All
7. Refresh the list in the Job Manager and view the list of deleted and skipped patrons

**Removing Homeroom, Grade Level, and Teacher Data in Inactive Student Records**

Inactive students can appear on reports run and in Circulation Homerooms because of data in their records. Follow these steps to change the records quickly:

**Steps to Remove Data from Inactive Student Records**

1. Go to Back Office - Update Patrons — Update
2. Choose Update Patrons Based on Global Criteria (dropdown list)
3. Use the dropdown lists to say
   For every patron ...Whose Patron Status is Inactive
   Change Homeroom to Undefined
4. Click on Update
5. Refresh the list in the Job Manager and view it to determine that you updated the correct records.
6. Return to Back Office - Update Patrons –Update
7. Update Patrons Based on Global Criteria (dropdown list)
8. Use the dropdown lists to say
   For every patron ...Whose Patron Status is Inactive
   Change Teacher to (leave field blank)
9. Click on Update
10. Refresh the list in the Job Manager and view it to determine that you updated the correct records.
11. Return to Back Office - Update Patrons –Update
12. Choose Update Patrons Based on Global Criteria (dropdown list)
13. Use the dropdown lists to say
   For every patron ...Whose Patron Status is Inactive
   Change Grade Level to (leave field blank)
14. Click on Update
15. Refresh the list in the Job Manager and view it to determine that you updated the correct records.