

CIRCULATION

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AGENDA

- Patron Scrubbing
 - Cir-32
- ALEPH level patron
- Global Blocks
 - cust-85
 - cir-77
- Patron Expiration Dates
 - cust-86
- Patron Deletes
 - cir-77
- Patron Records – Shared vs. Non-Shared
- Patron Addresses

Patron Scrubbing – cir-32 (NFG & NDJ)

- Removes the patron IDs from records that are only kept for statistical reasons.
- May be filtered by their age, using the Number of Days to Retain parameter.
- Removes patron IDs from all of the required records that are older than the number of days specified by the user:
 - Swaps the patron ID with SCRYyyymmdd (where yyymmdd is the execution date)
- The records from which patron records can be removed are:
 - Z31, Z40, Z68, Z36H, Z37H (recall history), Z35 (events table) and Z309 (circ logger).
 - If the patron ID is removed from the Cash Table (Z31), only transactions that are closed or waived will be handled.
 - If the patron ID is removed from the Patron Requests Table (Z40), only requests that are closed or cancelled will be removed.
 - If the patron ID is removed from the Orders Record (Z68), only orders that have a closed status, meaning CLS,LC,VC or CNB, will be handled.
 - When removing the Loans History Table (Z36H) the records can also be filtered by the item status and the sublibrary.

cir-32 service form

The screenshot displays the ALEPH Circulation software interface. The main window is titled 'ALEPH Circulation - Version 20.01 Library: NDJ50 - NDJ Administration'. A central dialog box, 'Remove Patron IDs (cir-32) - NDJ50', is open, showing various configuration options for a batch job. The dialog includes fields for 'Report File Name' (ndj-cir32-scrub-0207), 'Number of Days to Retain' (001), and several update options for tables like Cash Table (Z31), Loans History Table (Z36H), Requests History Table (Z37H), Events Table (Z35), ILL Patron Requests Table (Z410), Orders Table (Z68), and Circulation Logger Table (Z309). It also features checkboxes for 'Item Statuses' and 'Sublibraries'. The 'Runtime' is set to 'Today' and the 'Library' is 'NDJ50'. To the right, a 'Service Form' window is visible, showing a table with columns 'Patron-id', 'User', 'Process-id', and 'Alert'. The table contains three rows of data, all with 'SYSTEM' as the user and 'N' as the alert status. The process IDs are 8719, 7299, and 5835. The 'Service Form' window also has buttons for 'Service Form', 'View Printouts', and 'Refresh'. The Windows taskbar at the bottom shows the system clock as 2:10 PM on 2/14/2012.

Remove Patron IDs (cir-32) - NDJ50

*Report File Name: ndj-cir32-scrub-0207

*Number of Days to Retain: 001

Update Cash Table (Z31): Yes No

Update Loans History Table (Z36H): Yes No

Item Status (for Z36H Only): Include the Following Item Statuses Exclude the Following Item Statuses

Item Statuses:

- All
- One hour reserve
- One day reserve
- One week
- One week reserve
- Two hour reserve

Sublibrary (for Z36H Only): Include the Following Sublibraries Exclude the Following Sublibraries

Sublibraries:

- All
- Jamestown - Raugust Library

Update Requests History Table (Z37H): Yes No

Update Events Table (Z35): Yes No

Update ILL Patron Requests Table (Z410): Yes No

Update Orders Table (Z68): Yes No

Update Circulation Logger Table (Z309): Yes No

Runtime: Today

At: O'clock:

Library: NDJ50

Patron ID:

Service Form

Patron-id	User	Process-id	Alert
	SYSTEM	8719	N
	SYSTEM	7299	N
	SYSTEM	5835	N

Sort By: Date/Time Descending

Cir-32 service / NDJ vs NFG parameters

- Naming convention – ndj-cir-32-scrub-0207 vs **nfg-cir-32-scrub-0207**
- # of days to retain – 001 vs **180**
- Update Cash Table (z32) – YES vs **NO**
- Update Loans History Table (z36h) – YES vs **YES**
- Exclude the following item statuses – one week vs **Include the following item statuses – all**
- Include the following sublibraries – all vs **all**
- Update Request (recall) History Table (z37h) – YES vs **NO**
- Update ILL Patron Requests Table (z410) – NO vs **NO**
- Update Orders Table (z68) – NO vs **NO**
- Update Circ Logger Table (z309) – YES vs **YES**

Report Output from cir-32 service / NDJ – daily run

Print Preview

02/14/2012
scrub-patron-ids-00

Scrub Patron IDs Report

Report Date: 02/14/2012

Loans History Table (Z36H) Handled Records

Time:	Doc Number:	Item Sequence:	Number:	Material:	Sub Library:	Item Status:	Rewrite Succeed/Failed:
201202121857006	006268982	000010	000047248	BOOK	NDJMA	36	Succeed
Doc Number:	Item Sequence:	Event Sequence:	Event Type:	Cataloger:	Rewrite Succeed/Failed:		
000053206	000010	495008	Loan	STUDENT	Succeed		
000074331	000010	083387	Loan	STUDENT	Succeed		
000063315	000010	186025	Loan	STUDENT	Succeed		
000078087	000010	844298	PC Ren	KERICKSON	Succeed		
000080065	000010	139617	PC Ren	KERICKSON	Succeed		
006927136	000010	220670	PC Ren	KERICKSON	Succeed		
000020786	000010	314141	PC Ren	KERICKSON	Succeed		
006086385	000020	387072	PC Ren	KERICKSON	Succeed		
000090094	000010	463402	PC Ren	KERICKSON	Succeed		
006072207	000010	542337	PC Ren	KERICKSON	Succeed		
006807072	000010	636305	PC Ren	KERICKSON	Succeed		
000052102	000010	417690	PC Ren	KERICKSON	Succeed		
000089358	000010	500625	PC Ren	KERICKSON	Succeed		
000091849	000010	620998	PC Ren	KERICKSON	Succeed		
000089401	000010	999784	PC Ren	KERICKSON	Succeed		
006127397	000010	061102	PC Ren	KERICKSON	Succeed		
006138090	000010	859241	Return	STUDENT	Succeed		
006268982	000010	893490	Return	STUDENT	Succeed		
006013772	000270	817931	Loan	STUDENT	Succeed		
006927147	000010	570508	Loan	STUDENTSUP	Succeed		
000075829	000010	673076	Loan	STUDENTSUP	Succeed		

Print Close Close All

Report Output from cir-32 service / NFG – daily run

Print Preview

02/14/2012
scrub-patron-ids-00

Scrub Patron IDs Report

Report Date: 02/14/2012

Loans History Table (Z36H) Handled Records

Time:	Doc Number:	Item Sequence:	Number:	Material:	Sub Library:	Item Status:	Rewrite Succeed/Failed:
201108170810532	000037361	015480	013130823	ISSUE	NFGAD	36	Succeed
201108170810571	006876546	000010	013128593	BOOK	NFGCA	32	Succeed
201108170811009	006810906	000010	013128592	BOOK	NFGCA	32	Succeed
201108170811072	006483326	000010	013128586	CDISC	NFGCA	39	Succeed
201108170811124	006837704	000010	013128587	CDISC	NFGCA	39	Succeed
201108170821077	006957526	000010	013086431	BOOK	NFGNP	32	Succeed
201108170821171	006737928	000010	013092342	BOOK	NFGNP	30	Succeed
201108170821202	006293730	000040	013086369	BOOK	NFGNP	32	Succeed
201108170821262	006859988	000020	013086098	BOOK	NFGAD	32	Succeed
201108170821328	006084542	000030	013102547	BOOK	NFGCA	32	Succeed
201108170821503	006746282	000030	013103625	BOOK	NFGNP	32	Succeed
201108170821534	006732330	000020	013076415	BOOK	NFGNP	32	Succeed
201108170821561	000045482	000020	013076420	BOOK	NFGNP	33	Succeed
201108170821583	006828183	000020	013076421	BOOK	NFGNP	33	Succeed
201108170822044	006975156	000020	013079070	BOOK	NFGCA	32	Succeed
201108170822254	006908918	000080	013053286	BOOK	NFGAD	32	Succeed
201108170822553	006859231	000050	013043912	BOOK	NFGNP	32	Succeed
201108170823013	006784610	000010	013008086	BOOK	NFGCA	32	Succeed
201108170823107	006841526	000050	013069858	BOOK	NFGNP	33	Succeed
201108170823132	006878607	000010	013068672	BOOK	NFGNP	30	Succeed
201108170823199	006976758	000060	013052449	BOOK	NFGNP	32	Succeed
201108170823388	000095952	000010	013069859	BOOK	NFGNP	31	Succeed
201108170823478	006069106	000020	013076574	BOOK	NFGAD	30	Succeed
201108170823560	006775571	000010	013110401	BOOK	NFGAD	32	Succeed
201108170824016	006884293	000010	013083956	BOOK	NFGNP	30	Succeed
201108170824055	006877515	000010	013010961	BOOK	NFGNP	32	Succeed
201108170824099	006551357	000030	013111306	BOOK	NFGNP	32	Succeed
201108170824589	006093193	000070	013110400	DVD	NFGAD	10	Succeed
201108170825021	006118227	000010	013112279	DVD	NFGAD	10	Succeed
201108170825314	006821571	000030	013112698	GAME	NFGNP	11	Succeed
201108170825334	006866119	000030	013122037	DVD	NFGNP	10	Succeed
201108170825352	006867353	000030	013119439	DVD	NFGNP	10	Succeed

Print Close Close All

OBSERVATIONS / NDJ

- NDJ chose to run Patron Scrubbing to:
 - Maintain patron privacy in the face of the Patriot Act
 - Protect patron interests as those are no one else's business
 - Eliminate snooping
- Checkout history is retained (including checkout dates, due dates & return dates)
- Circulation statistics are intact (no need for patron name)
- NDJ does “not” scrub DVDs or Journals because:
 - Once damage is noticed, they want the ability to charge replacement and/or damage fees
 - Damage may not be noticed until next checkout (a page missing, a DVD is scratched beyond usage, etc)
- NDJ would love more flexibility in settings:
 - Such as being allowed to retain the names of one or two “more recent” users in order to trace back damage to items once it's noticed
 - Have never liked “all or nothing” approach

OBSERVATIONS / NFG

- NFG scrubs the names of patrons after 180 days of return
- NFG began in 2008 & thought they'd lower to 30 days but the balance between patron privacy & a reasonable amount of patron history to catch missing parts, damage etc kept scrubbing at 180 days
- NFG chose to run Patron Scrubbing to:
 - Maintain patron privacy in light of the Patriot Act
- Positive aspects:
 - Long-term patron privacy is preserved
 - No change in item history – loan date, due date & return date as well as times are all kept with the item history
 - No change in statistical information – circ stats are counted when using “by date” services
 - Keeping some patron information allows circ staff to re-construct most item histories in case of missing parts or damage
- Not entirely positive aspects:
 - The Outreach Dept would like to see a history of at least a year. They like to avoid checking an item out to the same site within a year's time. This could be managed by scrubbing the outreach patron status at a different # of days but have elected to keep all item statuses at same level

ALEPH Level Patron

<http://www.odin.nodak.edu/node/186>

- The Aleph level patron is automatically created when local patron information (xxx50) is set
- Needed in order for proper functionality to occur
 - Blocking in online catalog
 - Patron belongs to which libraries in online catalog
 - Recognizes patron expiration dates when submitting in online catalog
 - Potential advantage for another library to use existing Aleph level record instead of assigning xxx50 privileges
- Aleph level patron statuses are:
 - 90 (Higher Ed Student); 91 (K-12 Student)
 - 92 (Public Library Patron)
 - 93 (Faculty); 94 (Staff)
 - 95 (Local User); 96 (ILL User); 98 (Other)

GLOBAL BLOCKS

<http://www.odin.nodak.edu/node/186>

- If a local block exists on a patron record, cir-77 will set a global block and/or check that a global block exists during it's daily run
- To see which library is affected:
 - Patron may go to My Account in OPAC
 - Staff may run cust-85 service using PATRON ID
- Automatically cleared when local block is removed and cir-77 is run
- May be manually cleared by staff by going into tab2 of the Global Patron Information node and removing the global block
 - Reminder – global would set again the next day if local block is not taken care of

GLOBAL BLOCK SERVICES

cust-85

- Staff uses this service to note what other ADM libraries that patron may belong to if no blocks are found in their library
- Must use **patron ID** in service

cir-77

- Daily service that sets & removes blocks (among other things)

PATRON EXPIRATION DATES

cust-86

- This service is run to synchronize Aleph expiration dates to the latest ADM local expiration date
- If patron has local privileges in more than one library, the most current patron expiration is used on the Aleph level

PATRON DELETES

- Patron Delete Project will begin in April 2012
- ODIN Office will contact everyone when it is their time
- Reminder that cir-77 daily run will delete patrons once links (loans, cash, etc) are taken care of if the TO-DEL note is in tab2 of the Global Patron Information node
- After the delete project is done for your library you may run cust-48 (Remove Delete Flag from Patrons) so the TO-DEL note is removed from tab2 of the Global Patron Information node

PATRON RECORDS

SHARED

- Academic libraries because of EMPL ID and PLIF loads
- School libraries so record may just be updated when student enrolls in ND university/college

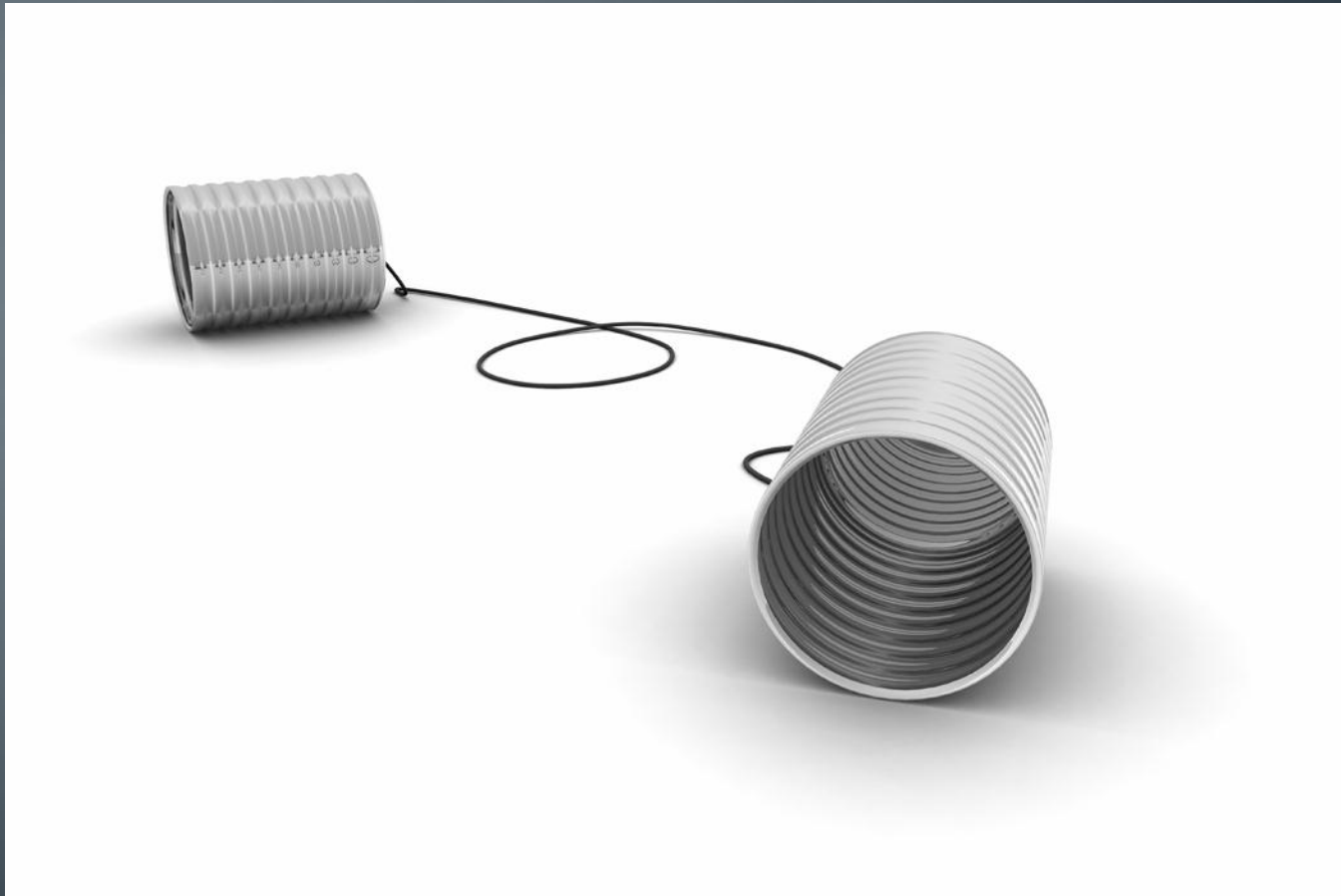
NON-SHARED

- Public Libraries
- If Interlibrary Loan needs to occur at more than one institution

PATRON ADDRESSES

- Expiration date of addresses should always be way into the future unless address is truly temporary
- From <http://www.odin.nodak.edu/node/40> any changes?
 - ODIN Work Group Approved USER_ADDRESS_TYPES:
 - 01 Permanent Address
 - 02 Current/Mailing Address
 - 03 Guardian/Campus Address
 - 04 Vacation Address
 - 05 Sabbatical
 - 06 Returned Mail Address
 - 07 Sponsor
 - 08 Commanding Officer
 - 09 Institutional Contact
 - 21 First period
 - 22 Second period
 - 23 Third period
 - 24 Fourth period
 - 98 Homeroom

OPEN DISCUSSION



Did this session help you?

What could be done to improve things?

Would you attend another ODIN Work Day?

