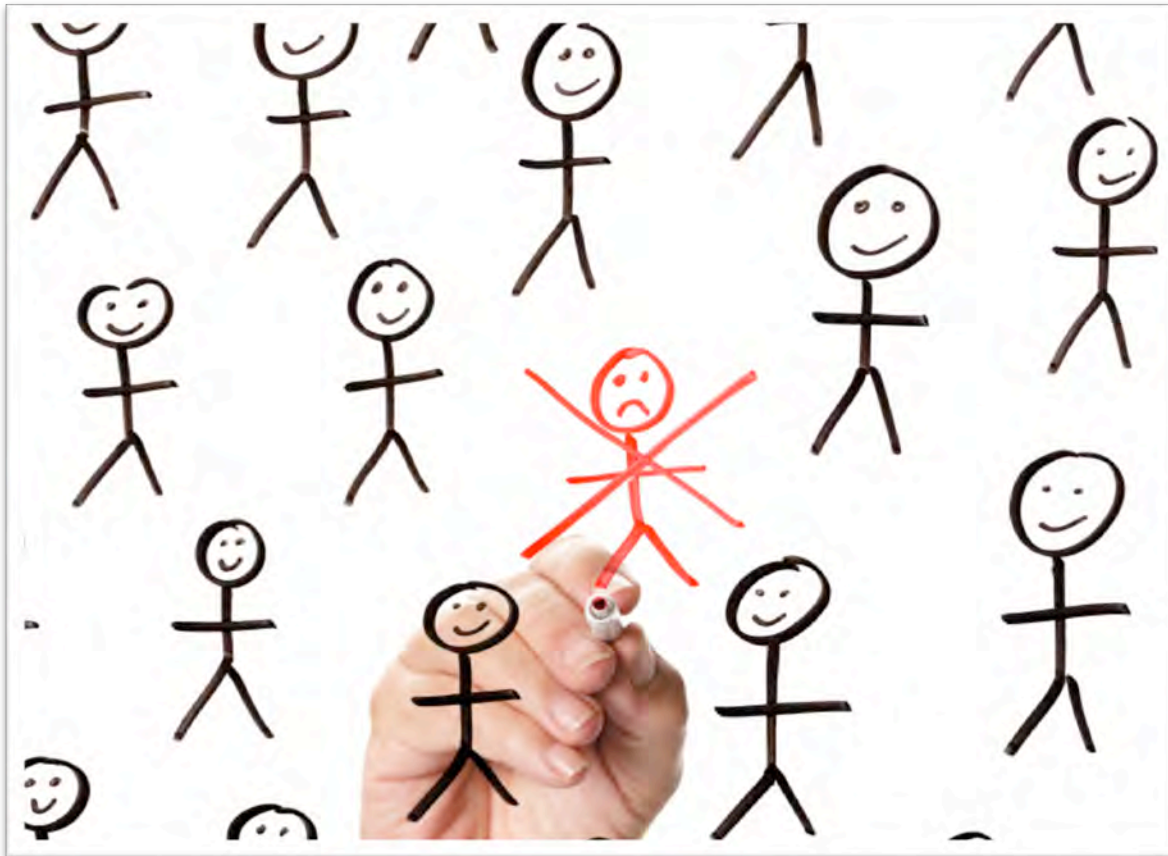


# Destiny

## Delete/Remove Inactive Patrons

April 1, 2015

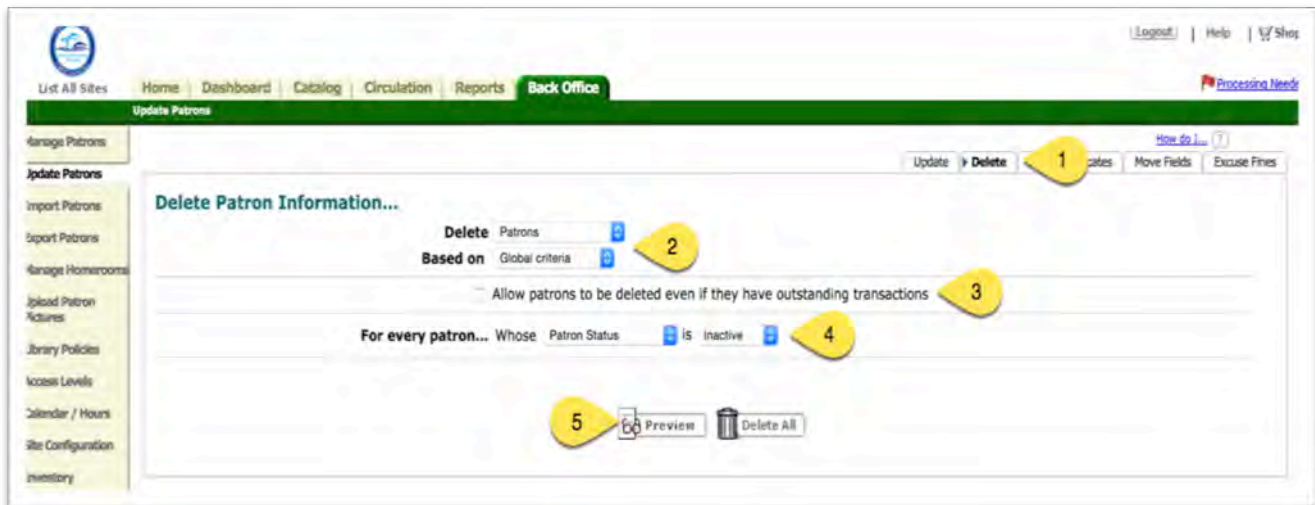


*This step-by-step guide will help you understand the process of deleting or removing inactive patrons without transactions from your Destiny database. Inactive patrons are patrons who have left the M-DCPS system completely and include both students and staff. A transaction is considered to be any item that is still checked out or any fine still attached to the patron. This guide also explains the decision process regarding removing inactive patrons with transactions.*

*Note: Once a patron withdraws, the student information system changes their status to inactive automatically. If patrons were added manually to your database, their status won't be updated automatically once they leave or withdraw. They will need to be identified and deleted manually. Also, the student information system continues to send a patron's status for several weeks after they have become inactive. This will make them "reappear" in Destiny even after they have been deleted. If they do reappear, they will be inactive and have no homeroom information.*

## Step 1. From Back Office/Update Patrons

1. Select the Delete sub-tab
2. Select Delete "Patrons"...Based on "Global criteria"
3. Do not check the "Allow patrons to be deleted even if they have outstanding transactions" check box
4. Select Whose "Patron Status" is "Inactive"
5. Click the "Preview" or "Delete All" button
  - o Preview will not perform the action and will create a report in your Job Manager that will allow you to preview the process before committing to it. If all looks okay, you will be able to Delete All directly from the report.



## Step 2. View the Report in the Job Manager

1. Review summary header data
  - Patron records found:
    - Number of inactive patrons
  - Patron records deleted:
    - Patrons without transactions that were deleted
  - Patron records skipped:
    - Patrons with transactions that were not deleted



### Step 3. Review and evaluate the two transaction types a skipped patron may have

1. If patron has a Fine
  - Review patron circulation record to determine if fine is from lost material or simply overdue
2. If patron has Checked out Material
  - Review patron circulation record to determine how long item has been overdue



### Step 4. Review inactive transactions details

1. To speed the process, view the report from the Job Manager and then open another browser window
  - In the second window, open Destiny/Circulation
  - In the first window (Job Manager) copy the patron barcode
  - Paste into the Circulation find field
    - This will call up the patron window and allow you to see what fines or overdue materials are assigned to the patron

Or

2. Create a Checked Out/Overdue Materials & Unpaid Fines report limited to Inactive patrons with transactions
  - Screen 1 (Format)
    - Show "All that are checked out"
    - Select "Unpaid Library Fines"
    - Select "Unpaid Patron Fines"
    - Format Report as PDF Output
  - Screen 2 (Limit)
    - Update My Patrons and select only Students
    - Select only Inactive from Status
    - Check "Also Include Patrons of other sites that have my materials..."
    - Check "Also Include The materials my patrons have..."
  - Screen 3 (Details)
    - Select and sort by Patron Name
    - Check "Title for library materials"
    - Check "Price of checked out/overdue materials"
    - Check "Subtotal items/fines for each patron"

Patron Reports  
Report Builder  
Report Manager

## Catalog -- Titles & Copies

- [Barcode Lists](#) - Identify used and unused copy barcodes. [More](#)
- [Bibliography](#) - Create reading lists for curriculum or promotion. [More](#)
- [Call Number Reports](#) - Identify copies that may be incorrectly cataloged. [More](#)
- [Reading Program Reports](#) - Identify titles with quizzes or possible purchases. [More](#)
- [Reported Abuses](#) - View reported abuses submitted by your patrons. [More](#)
- [Shelf List](#) - List copies in the order they should be shelved. [More](#)
- [Title & Copy List](#) - List your collection with optional copy detail. [More](#)
- [Weeding Log](#) - List copies that were weeded, deleted, or transferred. [More](#)

## Circulation

- [Current Checkouts/Fines](#) - Identify or send notices to the patrons with checkouts/fines. [More](#)

## Holds

- [Holds](#) - View all current holds and reserves. [More](#)
- [Hold Notices](#) - Print or email ready hold notices. [More](#)

Patron Reports  
Report Builder  
Report Manager

1. Format    2. Limit    3. Details

**Show**  **Checked Out/Overdue Materials**

- All that are currently overdue
- That are overdue by 1 to days
- That are due from 4/1/2015 to 4/1/2015
- All that are checked out
- Unpaid Library Fines
- Unpaid Patron Fines

**Format**  Report -- Output PDF

- Email to Homerooms
- Notices -- Language: English

Patron Reports  
Report Builder  
Report Manager

1. Format    2. Limit    3. Details

Checked Out / Overdue Materials & Unpaid Fines Report

**Limit the results to...**

**My Patrons** Student   
Graduating in 2015

**Status**  Active  
 Inactive  
 Restricted

**Also Include**  Patrons of other sites that have my materials and/or that owe fines to Library Media Services.

**My Materials** All Circulation Types

**Also Include**  The materials my patrons have and/or the fines they owe that belong to other sites in the district.

Patron Reports  
Report Builder  
Report Manager

1. Format    2. Limit    3. Details

Checked Out / Overdue Materials & Unpaid Fines Report

**Select & Sort by** Patron Name from to

Start a new page for each group

**Also Display...**

**Title Info**  Title for library materials  
 Price of checked out/overdue materials

**Patron Info**  Barcode  
 Phone number  
 Subtotal items/fines for each patron

- Grade Level
- Homeroom

## **Step 5. Recommended guidelines for processing inactive transactions**

1. Overdue fine only – Delete
2. Overdue books – Mark lost after 1 year or upon graduation
3. Lost book fine – Delete after 1 year
4. If the patron has graduated or left the system – Delete
  - This will delete all fines and mark all overdue items lost