DELETING PATRONS WHO HAVE LEFT THE DISTRICT

Destiny is not set up to remove inactive patrons, which means each library is responsible to delete their own inactive patrons. To help you with this task we change all student homerooms to a homeroom called Deleted Patrons right before school starts each year. Then we run a patron update. Active students’ homerooms will overwrite the Deleted Patrons homeroom. Anyone who is not active will remain in the Deleted Patrons homeroom. In October or November when beginning of the year student movement has settled down, we ask that you follow these steps to delete patrons who will not be returning to your district.

1. Run a report of students in the Deleted Patrons homeroom [Reports > Patron Reports > Patron Names > Select By Homeroom > Deleted Patrons Homeroom > Limit to Student Patron Type].

2. Look over the report carefully and move any active students, such as BOCES students who do not get district-assigned homerooms, to their correct homeroom. Go on to Step 3 only when you are sure that all the students in the Deleted Patrons homeroom should be deleted. We would expect the list to be short for all schools except the high school because their list includes last year’s seniors. In every other school student records move on to another school in the district unless students have left the district. If you know you have transient students who
move in and out of the district or students you do not want to delete for any reason, create a Hold homeroom and move those students out of the Deleted Patrons homeroom and into the Hold homeroom before proceeding to Step 3 [Back Office > Site Configuration > Site Administration tab > Edit Patron Homerooms > Add Homeroom “Hold”]

3. Finally, delete everyone who is in the Deleted Patrons homeroom. Be careful that you have selected only Deleted Patrons homeroom and only students when you run this global change. You cannot undo this process and if you find you have deleted a student in error, you can recreate their record but you will have lost all their history. [Back Office > Update Patrons > Delete Tab > Based on Global Criteria > For every patron whose homeroom is Deleted Patrons and Patron Type is Student].

If you are more comfortable working with us to do this, just give us a call. We’d be happy to help either on the phone or in person.