Merging Patrons in Evergreen

04.06.10, chb

Overview

This process will merge two or more patron records together into one record. It will retain all patron information, patron fines, and patron checkouts. It will also allow all merged patron ID numbers (library card numbers) to continue to be active. The patron ID number (library card number) for the lead account will not void the other patron ID numbers, but rather is the one displayed within the record.

Procedure

- 1. Acquire lists of duplicate patrons via an Evergreen report or by contacting a member of the NTLC Reports committee.
- 2. Select Search for Patrons from the Evergreen menu and enter the patron's last name and first name in the appropriate text entry boxes.
- 3. Verify that the patrons retrieved are indeed duplicate patrons.
- 4. If they are duplicate patrons, shift click to select the patrons and click the Merge Patrons button. See Example A: Patron Search Screen below.

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<u>File Edit Search Circulation Cataloging Acquisitions (Preview)</u>							Admin (-
1 Patron Search							>
DATRON LOR							
PATRON, JOE						Merge Patrons S	earth Form
Standing	Active	Barred	Birth Date	Family Name	First Name	Home Library (Full Name)	Middle Name 🛱
No Blocks/Penalties	Yes	No	1980-01-01	PATRON	JOE	Decatur Public Library	
	Yes	No	1972-04-04	PATRON	JOE	Decatur Public Library	
-							
Status							
Adult							
DECATUR							
Expires on 2012 04 05							
Holde: 0							
Available: 0							
Credit: \$0.00							
Bills: \$ 0.00							
Check Outs: 0							
Overdue: 0							
Long Overdue: 0							
Claimed Returned: 0							
Lost: U Non Catalogodi 0	-						
Non cataloged. 0	1						
ID and Contact Information							
Library Card: <u>999999999999999</u>							
ID 1: Drivers License							
xxxx99999							
ID 2:	<u>i</u>						
Date of Birth: <hidden></hidden>							
D DI 040 077 0740							
Day Phone: 940-627-5512							
Other Phone:							
other mone.							
OPAC Login: 99999999999999							
Email: joe_patron@yahoo.com							
Mailing Address							
1700 Hwy. 51 S.							
DECATUR TX 76248							
- Physical Addross							
1700 Lives 51 C							
1/00 HWy. 31 S.							
DECATUR TX 76248							
						Save Columns Co	py to Clipboard Print
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Example A: Patron Search Screen

5. Select a record to be the lead record and click on Merge. It is preferable that you use the most complete and accurate record. See Example B: Merge Screen on the next page.

Record Merging Merge these records? (Select the "lead" The	n, select merge.				
Merge	(B)	Select a lead record		Merge Patrons	Search <u>F</u> orm <u>R</u> etrieve
PATRON IOF	PATPON JOE				
FAIRON, JOE	FAIRON, JOE		First Name	Home Library (Full Name)	Middle Name
No Disalia (Davatkia)			JOE	Decatur Public Library	
	CHECK AND COLLECT FINES APPROPRIATELY.		JOE	Decatur Public Library	
	Standing				
Status	Patron exceeds fine threshold				
Adult	Patron exceeds max overdue item threshold Patron exceeds max overdue item threshold				
DECATOR Internet Filtered					
Expires on 2013-04-05	Status				
Holds:	Adult				
Available:	DECATUR				
Credit: \$0.00 Bille	Expires on 2013-03-23	=			
Check Outs:	Holds:				
Overdue:	Available:				
Long Overdue:	Credit: \$0.00				
Claimed Returned:	Bills: Check Oute:				
Non Cataloged:	Overdue:				
	Long Overdue:				
ID and Contact Information	Claimed Returned:				
ID 1: Drivers License	Non Cataloged:				
xxxxx9999					
ID 2:	ID and Contact Information				
Date of Birth: <hidden></hidden>	Library Card: 200070000909099				
Day Phone: 940-627-5512	BUBBA PATRON				
Evening Phone:	ID 2:				
Other Phone:	Date of Birth: <hidden></hidden>				
OPAC Login: 9999999999999999	Day Phone: 940-000-0000				
Email: joe_patron@yahoo.com	Evening Phone: 940-000-0000				
	Other Phone:				
Mailing Address	OPAC Login: 200070000909099				
1/00 Hwy. 51 S.	Email:				
DECATUR TX 76248	Mailing Address				
1700 Hwy. 51 S.					
2.001.01.01					
DECATUR TX 76248					
				Save Columns	Copy to Clipboard

Example B: Merge Screen

- 6. Enter the merged record and select Edit>3. Addresses. Delete the duplicate addresses created by the merge, if appropriate.
- 7. Clean up remaining fields within the patron record as needed, standardizing entry and removing inaccurate or incomplete information.
- 8. Select 4. Groups and Permissions and add the following note to the Alert box, "BRIDGEPORT/DECATUR MERGED PATRONS. CHECK AND COLLECT FINES APPROPRIATELY."
- 9. Select Finish.
- 10. Select Save User.