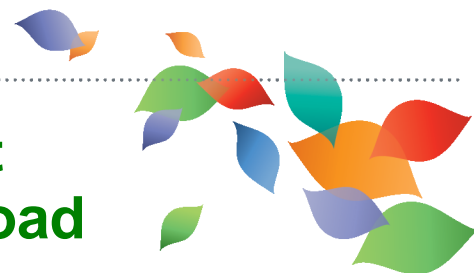# Destiny: Inactivating patrons not updated by a current full file upload

The purpose of this document is to present options for Destiny users that wish to automatically inactivate patron accounts in Destiny that are not currently in a scheduled XML update. This document outlines four options available and provides discussion starter questions to be considered before implementing this process. Implementation of this process is then performed as a partnership between the local technical staff and Follett Software.

Overview:

Run following a full load of patron data, the inactivate routine looks to the Destiny database to find dormant records, records that did not get updated. Limiters are set to define the patron types or access levels are to be evaluated, allowing for manually managed patrons to be left untouched. One of four options outlined below then update and possibly delete the dormant records based on the timing chosen by the user. Safety checks exist to ensure that the process runs only if a full XML load has been processed.

Preliminary district evaluation:

The following four decisions must be made by the district: What records to process? When to process the dormant records? What to do with the dormant records? What to do with dormant records with long outstanding transactions (if deleting patrons)? Once these questions have been answered then deployment and testing can begin.

What records to process?

The district must determine what records at each site will be included in the inactivate processing. Limiting by patron type or by access level is the mechanism by which district-based student and/or faculty/staff records (records managed by district systems) will be identified and included in processing and also site-based "other" patron records (local patron records created a the sites for parent volunteers, etc.) will be excluded from processing. SQL queries are available for succinct reporting of the patron types in existence at the sites and the number of patron records used by each type. The same is also available for reporting of access levels.

When to process dormant records?

The district must determine how often and when to run the processing. This will determine how often records are inactivated/transferred/deleted. Also to be considered is whether or not there should be a grace period before a record is inactivated. In other words, should the record be inactivated/deleted immediately after it is found to be dormant, or not until it has been dormant/inactive for X number of days.

What to do with dormant records?

Four options exist for inactivating and deleting dormant records. Options 1 and 2 exist for districts wanting to leave all inactive patron records or those that cannot be deleted in the original sites for final resolution and deletion. Options 3 and 4 exist for districts that wish to move all inactive patron records or those that cannot be deleted into a chosen site in Destiny for final resolution and deletion.

What to do with dormant records with long outstanding transactions (if deleting patrons)?
This question is relevant based on what inactivation option is chosen. If choosing to delete inactive records, what about the records that have transactions that are long outstanding? See the "Automated Deletion of Old Inactives" section below for options available for this issue.

What to do with dormant records?
The following are the options available for inactivating and deleting dormant records in Destiny:
   Update/Delete records in the current site:
   1. **Update All (Remove associations)**: The process will update site records, setting the Status=Inactive, Homeroom=none, username=none, password=none putting the date the record was last updated into the Card Expires field in Destiny, and leaving the record in the site. Dormant secondary associations will be removed (leaving any outstanding transactions attached to the primary record). Other options are available, including appending OLD- to the beginning of the barcode value if the existing value is 10 digits or less.
      Possible issues:
      - With the option to append OLD- to the barcode value during update, there is a chance that the update could not be completed because of another record in the site that already has the new barcode value.
      Other district decisions:
      - How often and when to run the process?
        Any "grace period" delay before inactivating records that were not updated?
      - What will be done with the records left inactive in the site?
        How long will these records be kept?
        How will they be deleted? (See the "Automated Deletion of Old Inactives" below)
      - Any other adjustments wanted when updating the record?

   2. **Update – Remove all without transactions**: First, the process will update site records, setting the Status=Inactive, Homeroom=none, username=none, password=none, putting the date the record was last updated into the Card Expires field in Destiny, and leaving the record in the site. Dormant secondary associations will be removed (leaving any outstanding transactions attached to the primary record). Second, a delete XML record is then generated to delete all inactive records without transactions. For further deletion considerations, see the "Deletion of Inactives" section below. Other options are available, including appending OLD- to the beginning of the barcode value if the existing value is 10 digits or less.
      Possible issues:
      - With the base update, there are no foreseeable conflicts.
      - With the option to append OLD- to the barcode value during update, there is a chance that the update could not be completed because of another record in the site that already has the new barcode value.
      - The record will not be deleted if there is a transaction. When the transaction is resolved (book checked in or marked lost, fine deleted, waived or paid), the record will be deleted at the next processing.
      Other district decisions:
      - How often and when to run the process?
        Any "grace period" delay before inactivating records that were not updated?
      - Who will review the Update Patrons job summary to identify and resolve outstanding transactions for inactive patrons?
        What if the transactions cannot be resolved?

Will the patron be deleted? (See the "Automated Deletion of Old Inactives" below)
- Any other adjustments wanted when updating the record?

Transfer the patron to a central location for archiving:
3. **Transfer All (Remove associations):** First, the process will update site records, setting the Status=Inactive, Homeroom=none, username=none, password=none, putting the date the record was last updated into the Card Expires field in Destiny. Second, the process will transfer the record to a "holding bin" site chosen by the district. The existing Patron Type and Access Level will be used at the target site. Inactive secondary associations will be removed (leaving any outstanding transactions attached to the primary record). Other options are available, including appending OLD- to the beginning of the barcode value if the existing value is 10 digits or less, and storing the current site short name in a User Defined field at the target site.
   Possible issues:
   - With the base update, there are no foreseeable conflicts.
   - With the option to append OLD- to the barcode value during update, there is a chance that the update could not be completed because of another record in the site that already has the new barcode value.
   - The transfer of the record to the target site will fail if the barcode is already in use in the target site. This may indicate a duplicate record situation that could then be merged.
   Other district decisions:
   - How often and when to run the process?
     Any "grace period" delay before inactivating records that were not updated?
   - Who will review the Update Patrons job summary to identify, investigate, and merge duplicate patrons?
   - What will be done with the records left inactive in the target site?
     How long will these records be kept?
     How will they be deleted? (See the "Automated Deletion of Old Inactives" below)
   - Any other adjustments wanted when updating the record?

4. **Transfer – Remove all without transactions:** First, the process will update site records, setting the Status=Inactive, Homeroom=none, username=none, password=none, putting the date the record was last updated into the Card Expires field in Destiny.   Second, the process will attempt to delete the record at the current site if there are no transactions. For further deletion considerations, see the "Automated Deletion of Old Inactives" section below. Third, a transfer is attempted to move the record to a "holding bin" site chosen by the district. The existing Patron Type and Access Level will be used at the target site. Inactive secondary associations will also be removed (leaving outstanding transactions attached to the primary record). Other options are available, including appending OLD- to the beginning of the barcode value if the existing value is 10 digits or less, and storing the current site short name in a User Defined field at the target site.
   Possible issues:
   - With the base update, there are no possible conflicts.
   - With the option to append OLD- to the barcode value during update, there is a chance that the update could not be completed because of another record in the site that already has the new barcode value.
   - The record will not be deleted if there is a transaction. When the transaction is resolved (book checked in or marked lost, fine deleted, waived or paid), the record will be deleted at the next processing.
   - The transfer of the record to the target site will fail if the barcode is already in use in the

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target site. This may indicate a duplicate record situation that could then be merged.
- The transfer of the record to the target site will fail if the record was successfully deleted by the previous XML record. This message can be ignored.

Other district decisions:
- How often and when to run the process?
  Any "grace period" delay before inactivating records that were not updated?
- Who will review the Update Patrons job summary to identify, investigate, and merge duplicate patrons?
- What will be done with the records left inactive in the target site?
  How long will these records be kept?
  How will they be deleted? (See the "Automated Deletion of Old Inactives" below)
- Any other adjustments wanted when updating the record?

Automated Deletion of Old Inactives:

With the implementation of an inactivation routine, the next step often is to implement a forced deletion of inactive records that still have outstanding transactions. This discussion applies to all options listed above, as the inactive records must be deleted at some point and often there are still outstanding transactions linked to some of those patrons.

Processing also can be configured to query from the database the inactive records that have been inactive for a set period of time or if certain criteria are met. These records are then processed through and uploaded with a parameter which instructs Destiny to delete the patrons, even if there are outstanding transactions. Items checked out to the patron are marked "Lost" and existing fines are deleted. The Update Patrons job summary reports all of this information for recordkeeping purposes.

The records that qualify for forced deletion can be identified in three ways:
- Records that have been inactive for X number of days
- Records where the Destiny Grad Year field value is now a past school year
  - If the records must be kept for additional school years past the graduation year, the number of "extra" school years can be configured as well.
  - The records will qualify for deletion on the first day of the new statistical school year as set in the Destiny | Setup | Edit District | Statistical Year Starts In field.
- Records where the patron has reached a certain age

After reviewing and discussing these options with the appropriate stakeholders in your district, contact Follett Technical Support to schedule time to work with a representative to implement your decisions.