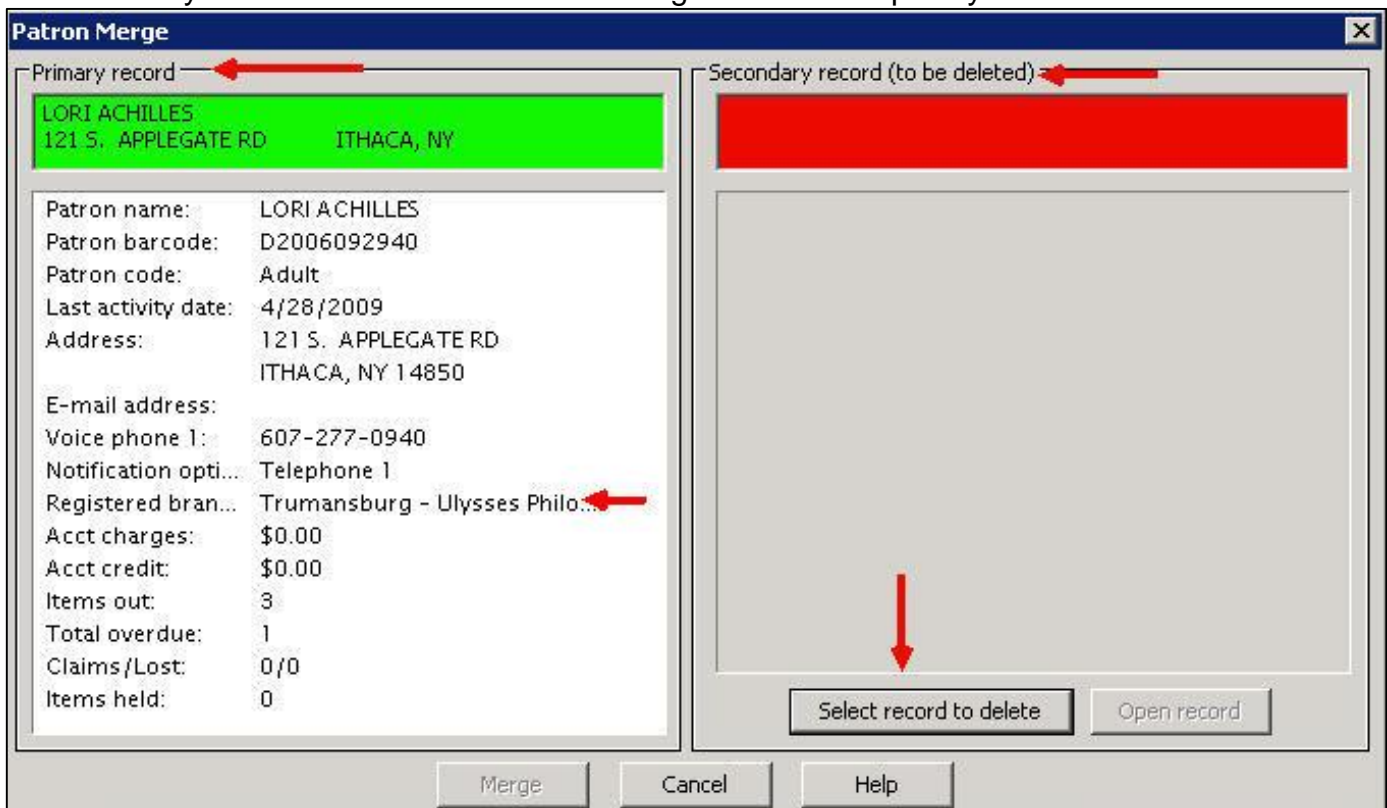


Merging Patron Records

- First, determine which library will be the patron's "home" library. Search for and open this patron record using the patron record Find Tool (F7).
- Left click on Tools and then select **Merge with Patron**.



- The Patron Merge window will display. The primary record is the one you want to keep. The secondary record is the one that will be merged and subsequently deleted.



- Click on the **Select record to delete**, which will bring up the patron record Find Tool (F7).
- Search for the patron record you want to merge. Highlight it and press enter on the keyboard.

Patron Records - Name (Last, First Middle) Find Tool:2

File Edit Options Help

General Settings Scoping Branches Collections Databases

Object: Patron Records Limit by: (None) Search Mode: Normal Power SQL

Search by: Name (Last, First Middle) Value: Search

Type: Exact match (implicitly truncated) Count Only

Sort by: (None) Stop

For: achilles, lori New Search

Clear

Help

Barcode	Name	Street	City	State	Zip	Library
D2006092940	ACHILLES, LORI	121 S. APPLGATE RD	ITHACA	NY	14850	Trumansburg - ...
D0002115398	ACHILLES, LORI ANN	121 S APPLGATE RD	ITHACA	NY	14850	Ithaca - Tompkin...

- Click **Open Record** to verify the information or click on **Merge** to continue merging.

Patron Merge

Primary record

LORI ACHILLES
121 S. APPLGATE RD ITHACA, NY

Patron name: LORI ACHILLES
Patron barcode: D2006092940
Patron code: Adult
Last activity date: 4/28/2009
Address: 121 S. APPLGATE RD
ITHACA, NY 14850
E-mail address:
Voice phone 1: 607-277-0940
Notification opti... Telephone 1
Registered bran... Trumansburg - Ulysses Philo...
Acct charges: \$0.00
Acct credit: \$0.00
Items out: 3
Total overdue: 1
Claims/Lost: 0/0
Items held: 0

Secondary record (to be deleted)

LORI ANN ACHILLES
121 S APPLGATE RD ITHACA, NY

Patron name: LORI ANN ACHILLES
Patron barcode: D0002115398
Patron code: Adult
Last activity date: 4/18/2009
Address: 121 S APPLGATE RD
ITHACA, NY 14850
E-mail address: shearego2@aol.com
Voice phone 1: 607-277-0940
Notification opti... Email Address
Registered bran... Ithaca - Tompkins County Pub...
Acct charges: \$0.00
Acct credit: \$0.00
Items out: 21
Total overdue: 0
Claims/Lost: 0/0

Select record to delete Open record

Merge Cancel Help

- A confirmation window will display. Click on **OK**. The records are now merged

Polaris

 The primary record will be updated and saved
The secondary record will be deleted.

Do you want to continue merging?

OK Cancel

- The following note will be inserted in the non blocking note field of the merged patron record; “Patron record was merged with D0003256541, on Jan 13 2011 12:41PM. The secondary record has been deleted.”
- After the merge is completed, you must manually remove the duplicate patron block. To remove a block from a patron’s record in Patron Status:
 - Search for the patron with the patron status Find Tool (F6).
 - Left click on the General icon;
 - Left click on the block you want to delete to highlight it;
 - Left click on Delete Block.

Questions? Comments?

Contact:

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