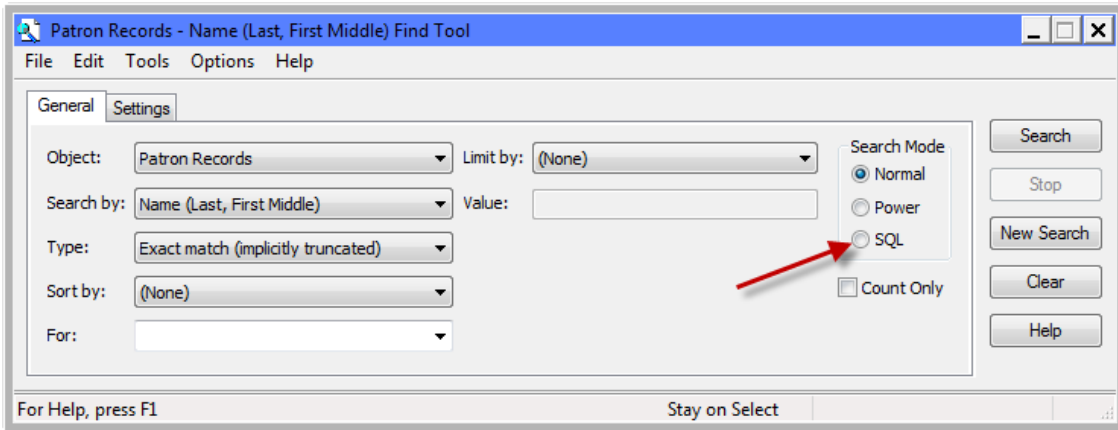


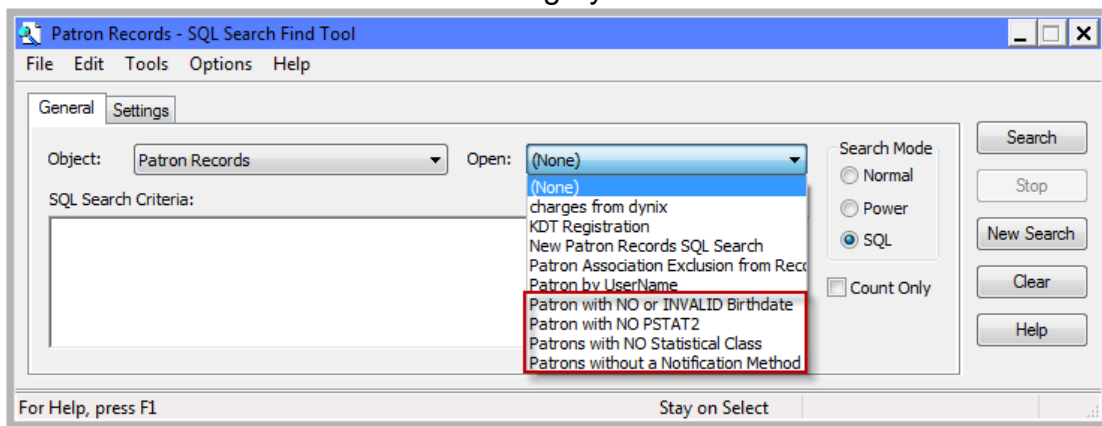
Using SQL Queries

Prior to moving to “*One Card, Many Libraries*,” each member library should attempt to clean up their patron records. Updating the following fields will create more consistent records that are easier to manage: birthdate, PSTAT2 (school district), and statistical class. Follow the steps below to add blocking notes to patron records that require updating.

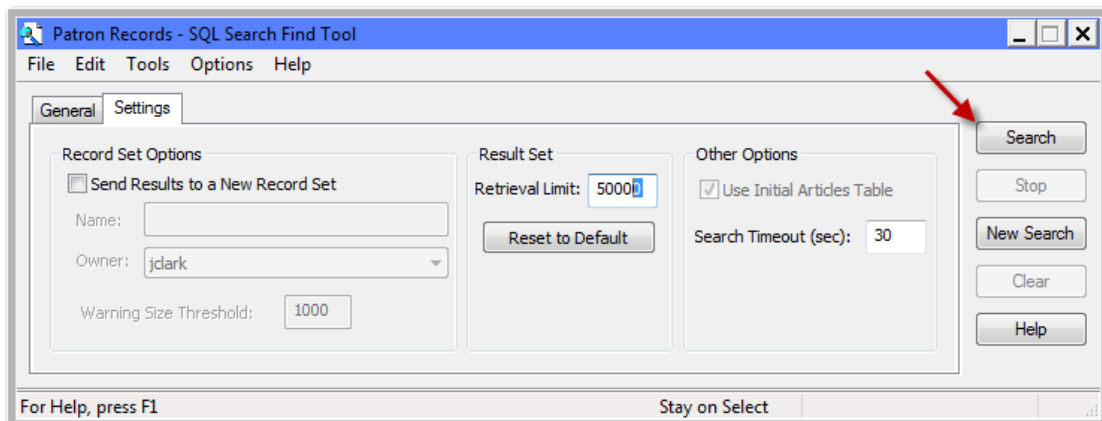
1. Open the **Patron Records Find Tool (F7)**. On the **General** tab, click on **SQL**.



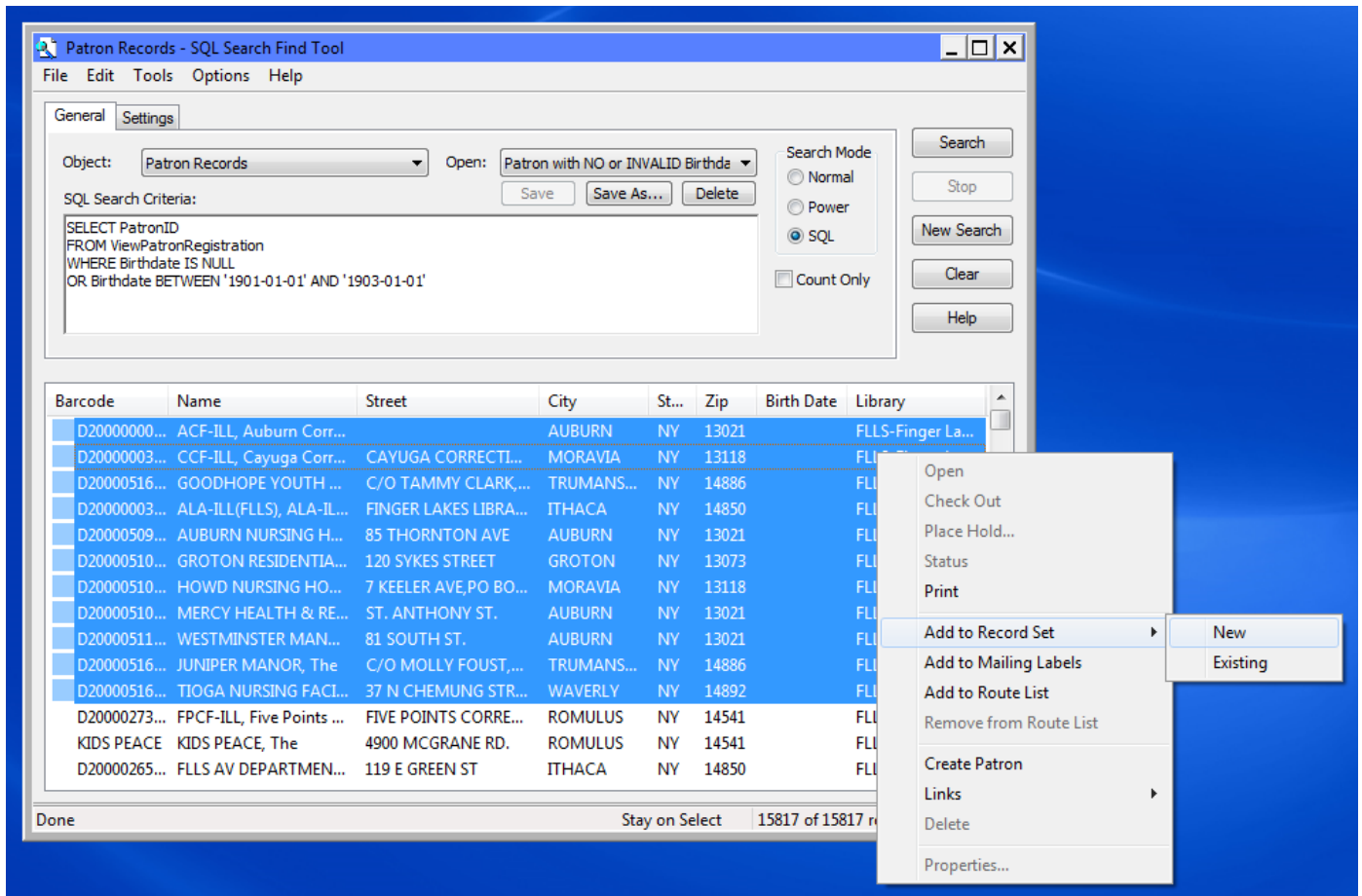
1. In the drop down menu located next to **Open**, select one of the highlighted categories. These steps will have to be followed for each category.



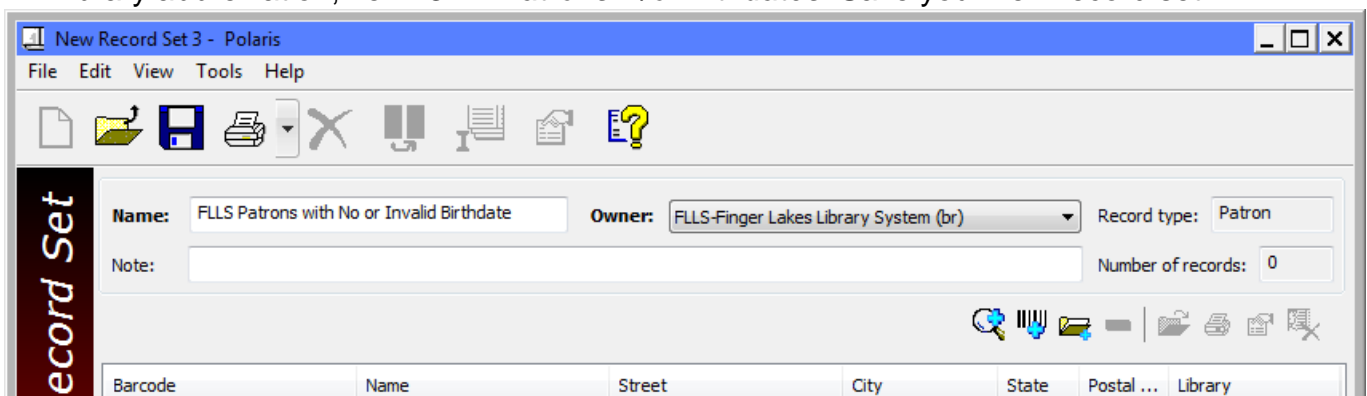
2. Click on **Settings** and increase the retrieval limit by adding a zero to ensure that you find all the records. Click on **Search**.



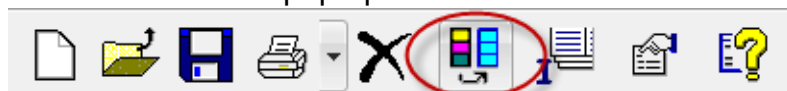
- The records will appear below the Find Tool. On your keyboard, press **Ctrl+Shift+A** to retrieve all records. Click on the **Library** heading to sort by library and find your records. Highlight your records by holding down the **Shift** key on the keyboard and selecting the first and last items in the section. When the appropriate records are highlighted, right click on them and move your mouse to **Add to Record Set** and then **New**.



- A new record set will open. Remember to use FLLS naming conventions and include your library abbreviation, i.e. *PORT Patrons w/o Birthdates*. Save your new record set.



- Perform a Bulk Change to add blocks to patron records that need to be updated. Click on the **Bulk Change** icon and a window will pop up.



- On the **Registration** tab, click in the box next to **Registered branch** and then select your library.

Patron Record Bulk Change

Registration | Address | General | UDFs | Blocks/Notes | Report/Record Set

Registered branch: FLLS-Finger Lakes Library System (FLLS)

Patron code:

Expiration date: 5/10/2016
Expiration term:

Statistical class:

OK Cancel Help

- Then, go to the **Blocks/Notes** tab and click in the box next to **Library assigned blocks**. Select the correct note from the drop down menu. Click **OK** and you will be presented with a summary of changes. Click **Continue** to finalize the Bulk Change. Now, when a patron tries to check out, a message will pop up asking staff to update their record!

Patron Record Bulk Change

Registration | Address | General | UDFs | Blocks/Notes | Report/Record Set

Library assigned blocks: Actions: Add

Address Check/Correction Required

Address Check/Correction Required
Duplicate Patron Block
Emails bounced-verify email address and change notification option back to email
Library card was turned in at the Circulation Desk
Need proof of age or parent/guardian signature
New patron card returned
New patron needs proof of address
No Internet
Privileges suspended by responsible person
Registration has expired
Request ID before issuing new card
See Supervisor
Update Birth Date
Verify/Update Phone# & Change Notification Option to Telephone1
Incomplete Return - See Claimed Missing Parts

Blocking notes: Actions:

OK Cancel Help



Questions? Comments? Contact:

CNS Department - Finger Lakes Library System
1300 Dryden Rd., Ithaca, NY 14850
(607) 273-4074 x237