## **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.

Patron Records - Name (Last, First Middle) Find Tool	
File Edit Tools Options Help	
General       Settings         Object:       Patron Records         Search by:       Name (Last, First Middle)         Value:       Value:         Type:       Exact match (implicitly truncated)         Sort by:       (None)         For:	Search Mode Normal Power SQL Count Only Search Search Stop New Search Clear Help
For Help, press F1 Stay on Select	H.

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.

Patron Records - SQL Search Find Tool File Edit Tools Options Help		
General Settings Object: Patron Records    SQL Search Criteria:	Open: (None)  (None)  charges from dynix  KDT Registration New Patron Records SQL Search Patron Association Exclusion from Record Patron by UserName Patron with NO or INVALID Birthdate Patron with NO PSTAT2 Patrons with NO Statistical Class Patrons without a Notification Method	Search Mode Normal Power SQL Count Only Help
For Help, press F1	Stay on Select	

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

Records - SQL Search Find Tool			_ 🗆 X
File Edit Tools Options Help		<b>\</b>	
General Settings			
Record Set Options	Result Set	Other Options	Search
Send Results to a New Record Set	Retrieval Limit: 5000	Use Initial Articles Table	Stop
Name:	Reset to Default	Search Timeout (sec): 30	New Search
Owner: jdark 💌			Clear
Warning Size Threshold: 1000			Help
For Help, press F1	St	ay on Select	tt.

3. 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.

Patron Records - SQL Search Find Tool File Edit Tools Options Help General Settings Object: Patron Records SQL Search Criteria: SELECT PatronID FROM ViewPatronRegistration WHERE Birthdate IS NULL OR Birthdate BETWEEN '1901-01-01' AND '1	Open: Patro Sa 903-01-01'	on with NO or IN ve Save As	VALID E	širthda ▼ Delete	Search Mode Normal Power SQL Count Only	Search Stop New Search Clear Help		
Barcode Name	Street	City	St	Zip	Birth Date Librar	y 🔺		
D20000000 ACF-ILL, Auburn Corr		AUBURN	NY	13021	FLLS-	Finger La		
D20000003 CCF-ILL, Cayuga Corr	CAYUGA CORRECTI	MORAVIA		13118	FLI	Open		
D20000516 GOODHOPE YOUTH	C/O TAMMY CLARK,	TRUMANS		14886	FLI	Charle Out		
D20000003 ALA-ILL(FLLS), ALA-IL	FINGER LAKES LIBRA	ΠΗΑCΑ		14850	FLI	Check Out		
D20000509 AUBURN NURSING H	85 THORNTON AVE	AUBURN	NY	13021	FLI	Place Hold		
D20000510 GROTON RESIDENTIA	120 SYKES STREET	GROTON	NY	13073	FLI	Status		
D20000510 HOWD NURSING HO	7 KEELER AVE, PO BO	MORAVIA	NY	13118	FLI	Print		
D20000510 MERCY HEALTH & RE	ST. ANTHONY ST.	AUBURN	NY	13021	FLI	Add to Record Se	+ •	New
D20000511 WESTMINSTER MAN	81 SOUTH ST.	AUBURN	NY	13021	FLI	Add to Necold Se	ah ala	Fuinting a
D20000516 JUNIPER MANOR, The	C/O MOLLY FOUST,	TRUMANS	NY	14886	FLI	Add to ivialling Li	abels	Existing
D20000318 HOGA NURSING FACI	37 N CHEMUNG STR	ROMULUC	NY	14892	FLL	Add to Route List	t	
VIDS DEACE VIDS DEACE TH-	4000 MCGRANE PD	ROMULUS	NY	14041	FLL	Remove from Ro	ute List	
D20000265 ELLS AV DEDAPTMEN	110 F GREEN ST	THACA	NV	14041	FLL	Create Patron		
D20000203 FEES AV DEPARTMEN	115 E UNEEN 31	TICACA	INT	14030	r'Ll	Links	•	
Done		Sta	y on Se	elect	15817 of 15817 r	Delete		
						Properties		

4. 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.

J Ne	w Record Set	3 - Polaris								_ 🗆 >	×
File	Edit View	Tools Help									
B	<b>2</b>	] <b>@</b> • X	IJ.	đ	E?						
iet	Name:	FLLS Patrons with No	or Invalid Birthdate		Owner:	FLLS-Finger Lakes Lib	rary System (br)	•	Record ty	/pe: Patron	]
5	Note:								Number o	frecords: 0	
cord							Q	¢ 🖐 🖻	₹ —   ₪	i o d 🔍	
e e	Barcode		Name		Street	t	City	State	Postal	Library	

5. 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.



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

Registration	Address General UD	s Blocks/Notes Report/Reco	rd Set
	Peristered branch:	ELLS-Einger Lakes Library Syst	mm /ELLC =
	Negistered branen.	T EESH INGELEAKES EIDI ALV SYST	em (rue +
	Patron code:		w
	_		
	Expiration date:	5/10/2016	
	Expiration term:		Ŧ
	Statistical class:		~

7. 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!

Registration	Address General UDFs Blocks/Notes Report/Record Set
	_
	V Library assigned blocks: Actions: Add
	Address Check/Correction Required
	Address Check/Correction Required Duplicate Parton Block Emails bounced-verify email address and change notification option back to em Library card was turned in a the Circulation Desk New patron needs proof of address New patron needs proof of address No Internet Privileges suspended by responsible person Registration has expired Request ID before issuing new card See Supervisor Undate Birth Date Verify/Update Phone # & Change Notification Option to Telephone 1 Verify/Update Phone # & Change Notification Option to Telephone 1 Verify/Update Phone # & Change Notification Option to Telephone 1
	Bloding notes: Actions:
	OK Cancel Hel
uesi	FINGER LAKES LIBRARY SYSTEM tions? Comments? Conta
NS D	epartment - Finger Lakes Library Sys

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