

Training

SIERRA CIRCULATION

How to Find Duplicate Patron Accounts

The first step to finding duplicate patron accounts requires defining what constitutes a duplicate patron account.

Exact duplicate patron accounts would include the same name, address, phone number, barcode, and unique ID number. Possible duplicate accounts could have the same name (with or without a middle name or middle initial) and barcode with a different address and phone number. Or the same name and address with a different barcode. There are many different combinations of fields in the patron accounts that could indicate a duplicate account or not. Defining a duplicate patron account by name alone is not enough. There are many common names, such as “John Smith” or “Mary Jones,” that will not be duplicate patron accounts, based on data in other fields within the accounts.

There are a few different ways to locate duplicate patron accounts.

1. Let the system do it for you. If Headings Reports is set up to report duplicates based on indexed fields, such as barcode, in the patron account, running a “duplicate entries” report can provide you with the duplicate accounts.

See [Duplicate Entries Headings Reports](#) in the Sierra WebHelp for further information.

2. Smaller libraries might want to create a review file of all their patron records. Then sort it by patron name and open the review file on the screen. Scrolling through the list provides a quick way to identify patron accounts which have the same name. The list could also be pulled into global update and the display toggled from barcode to name to find the accounts that have the same name. Comparing the accounts based on the description provided in the opening paragraph of this article will help determine which accounts are duplicated.

Toggling the records to display by barcode will also provide a list of patron accounts that contain the same barcode. (This is another different quick clean-up project. Look for the article in this knowledge base.)

See [Selecting Records to Globally Update](#) in the Sierra WebHelp for further information.

3. If your library does a batch upload of patron records using Data Exchange, run a test load first and make note of any duplicate records. Then resolve those problematic ones prior to uploading the new file to avoid creating even more duplicate accounts.

See [Importing Patron Data](#) in the Sierra WebHelp for further information.

4. An SQL query is a possible solution to retrieving patron records that are duplicates. The key is to form a search strategy that appropriately identifies records that are truly duplicates as opposed to records with similar information. Jeremy Goldstein at Minuteman Library Network shared this example query: <https://github.com/jmgold/SQL-Queries/blob/master/Custom%20reports%20site/duplicate%20patron%20records.sql>.

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