



SIERRA CIRCULATION

How to Resolve Duplicate Patron Accounts

After identifying a duplicate patron record, how does it get resolved? It is possible to merge the two records so the data is contained in a single record and the unnecessary record is deleted.

Permission # 36 (merge patrons) is required to be able to perform this task. See [Merging Duplicate Patron Records](#) in the Sierra WebHelp for additional information.

From the function list select: **Merge Duplicate Patron Records**

The next screen prompts to search duplicate patron records to merge by patron record number.

Under source record number, type the patron record number to discard.

Under destination record number, type the patron record number to keep.

Click the Merge Patrons button. That will bring up a window with patrons to merge. You can compare records data to make a final decision. The destination record is selected by default.

Click the Merge Patrons button to complete the merge.

Sierra · Innovative Library · Academic US · Schlomit Schwarzer

File Edit View Go Tools Reports Admin Help

sierra **FUNCTION** Merge Duplicate Patron Records

Save All View Close

Merge Patrons

☐ Source Record

This record's fields will be moved TO the Destination Record, and this record will be deleted:

p1009653x

Expiration Date	05-15-2019	Dept	Unknown	Alt Dept	Interdisciplinary Studies
Dept Supervisor	Geography	Patron Type	Graduate Student	Home Library	Main Library
Patron Message	No Message	Manual Block	None	Claims Returned	0
Money Owed	\$0.00				

Preferred Name Hocsmen, Schlomit
Address Street: 5850 Shellmound Way

Items: none

☒ Destination Record

The fields from the Source Record will be moved to this record:

p10095093

Expiration Date	05-15-2021	Dept	Graduate Student	Alt Dept	Behavioral Health
Dept Supervisor	Accounting	Patron Type	Graduate Student	Home Library	Main Library
Patron Message	No Message	Manual Block	None	Claims Returned	0
Money Owed	\$0.00				

Preferred Name Schwarzer, Schlomit
Address Street: 5850 Shellmound Way

Items: none

It is also possible to simply delete one of the duplicate patron records. While selecting which one to delete, compare the two records and look for:

- Created date (is one record much older than the other?)
- Last updated date (have either record been updated recently, indicating it has been used?)
- Expiration date (is one account already expired?)
- Usage (data in current checkout field, total check out field, money owed field)
- Incomplete variable length fields (barcode is missing, address or phone number is missing)

Make your decision based on your findings. An incomplete record that has never been used would be the one to delete rather than one with more complete information or that has been used.

To delete a patron account, open the record in EDIT mode. Click on FILE in the upper left corner of the record. Select DELETE PATRON RECORD. Choose YES to delete the account.

Patron accounts with items checked out or which have money owed can't be deleted. The "merge" process can move that data to the other patron account.

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