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Introducing Bulk Patron Delete for libraries with WMS and Tipasa

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Now available! Bulk patron delete

- New functionality was developed in response to your requests for a bulk patron delete option
- A special recognition and thank you to the six pilot libraries!
- Technische Universiteit Eindhoven, De Anza College, University of New Brunswick, Tulsa Community College, Butler University and University of Gloucester
- So far, they've successfully deleted over 20,000 patrons

Today's agenda

- Overview of new bulk patron delete requirements
- Steps for submitting bulk patron delete data file
- Tips and tricks learned during the bulk delete data pilot
- Resources
- Questions

Overview of bulk patron delete

- **There is a delete file format and requirements** for submitting a file of patron records to be deleted from WMS or Tipasa
- **Matching for deleting patron records** mirror the fields used for ongoing patron data loading
- **Delete files will be submitted** to a new file directory
- **Bulk deletion of patron** accounts can be sent ongoing i.e. end of semester for removing expired accounts

File formats and data fields

- Tab-delimited and XML format
- Templates and documentation is available in the Librarians' Toolbox - Help Site
- Data fields in files:
 - institutionId (required) also called your WorldCat registry ID
 - Barcode (optional)
 - sourceSystem/idAtSource pair (optional)
 - illID (optional)
- Data does not need to be provided for all fields

What fields should I provide if I am WMS library?

- Provide the required field institutionID (WorldCat registry ID)
- Barcode (patron barcode)
- Example:

institutionID	barcode	sourceSystem	idAtSource	iiiiID
127941	811702497			

What fields should I provide if I am Tipasa library?

- Provide the required field institutionID (WorldCat registry ID)
- iIIID
- Example:

institutionID	barcode	sourceSystem	idAtSource	iIIID
127941				12345

If I do not have the barcode or ILLId

- Provide the required field institutionID (WorldCat registry ID)
- sourceSystem and idAtSource pair
- Example:

institutionID	barcode	sourceSystem	idAtSource	illID
127941		urn:mace:oclc:idm:ocwms	bobbiobgxx	

Tab-delimited requirements

1. Must contain all five column headers in this order: institutionID, barcode, sourceSystem, idAtSource and IIIID
2. Accepts special characters (e.g., >, #, &, @, etc.) in text fields
3. Provide the delete file in UTF-8 encoding file format
4. The first line of the text file is the header and must contain column names separated by four tabs
5. Column header names are case insensitive but must be spelled correctly
6. All values in columns are strings (text string, numeric string, etc.), if you have no data to put in a column, leave it empty

XML requirements

1. Provide the file in XML tagged format, do not provide tags for empty values

2. Special characters must include proper HTML escape wrapper; for example: & (&)

3. Tags are case sensitive and must be spelled correctly

4. All values within tags are strings (text string, numeric string, etc.)

What is the matching process?

- Bulk delete includes the same matching elements of the current ongoing patron load file
- Must have **institutionId** and data is matched on the element that is provided:
 - **Barcode**
 - **illId**
 - **SourceSystem/IdAtSource** pair
- Please review documentation in Librarians' Toolbox - Help Site

File naming requirements

- The filename must include the word '**delete**'
- Filenames cannot contain spaces or special characters
- The file name is not case sensitive
- Tab-delimited files must have .txt extension and XML files the .xml extension
- Examples: [OCLCsymbol]patronsdelete.txt or [OCLCsymbol]patronsdelete.xml

New directory structure for bulk patron delete loads

- Added for all WMS and Tipasa libraries:
 - `xfer/wms/test/in/pdelete` is used for data being evaluated by OCLC for automated data loads
 - `xfer/wms/in/pdelete` will be used once bulk patron delete data has been approved by OCLC for automated data loads

Note: There is no change for existing **patron load** directories:

`xfer/wms/in/patron` and `xfer/wms/test/in/patron`

What does this mean for your library?

ACTION REQUIRED

- **If you wish to remove patron records from WMS or Tipasa in bulk, you must** use the new delete template (tab-delimited) or XML schema and submit a patron delete file for review to OCLC
- **If you wish to send ongoing patron data deletes,** you can once you have an initial file reviewed and approved by OCLC

NEXT STEPS

Getting started

1. **Determine which patrons need to be deleted from WMS or Tipasa.** You may need to use the patron data reports available in WMS or a report from a 3rd party system
2. **Identify format.** Decide if you wish to use tab-delimited or XML
3. **Review documentation.** Visit The Librarians' Toolbox pages at oclc.org/patrondatafiles
4. **If library staff are not preparing the patron delete file, provide information to your institution's contact.** Send the documentation to the person at your institution responsible for creating a patron delete file

Submitting your file for review

1. **Send a test file.** Your library is required to send its first patron delete file to the appropriate FTP Test Directory for review
 - wms/test/in/pdelete (FTP)
 - xfer/wms/test/in/pdelete (Secure FTP)
2. **Email your regional support office.** When submitting your patron delete file, please email your regional support office (<http://oc.lc/support>) and include:
 - **Subject:** [OCLC Symbol] 'Patron Delete File for Review'
 - **Body:** Include contact information and state if you'd like the delete file processed and patron records deleted from WMS and Tipasa

OCLC's file review process

- We will share results with you within 7-10 business days
 - **If the file has errors**, we will let you know and ask you to resubmit revised patron delete file to the **'pdelete' test directory**
 - **If the file is error free**, we will process your file if requested

Ongoing processing

- We will inform you that your patron delete files can now be submitted to the appropriate FTP ongoing patron directory
 - **wms/in/pdelete (FTP)**
 - **or, xfer/wms/in/pdelete (Secure FTP)**

Patrons will not be deleted if

- Outstanding checkouts
- Outstanding bills
- Been sent to a collection agency

- This mimics patron deletes in WorldShare Admin

The following will not prevent a patron from being deleted

- Expired
- Active hold
- Room scheduled
- ILL requests
- Any proxy accounts

Patron delete reporting

- **Available in wms/reports directory**
- **Summary Report**
 - Listing of total deletes and total exceptions
- **Exceptions File**
 - Non-matching records
 - The patron does not exist in WMS
 - Circulation transaction message:
 - Patron has outstanding loans
 - Patron has outstanding fiscal transactions
 - Been sent to collection agency

TIPS AND TRICKS LEARNED DURING THE BULK DELETE DATA PILOT

WMS Libraries

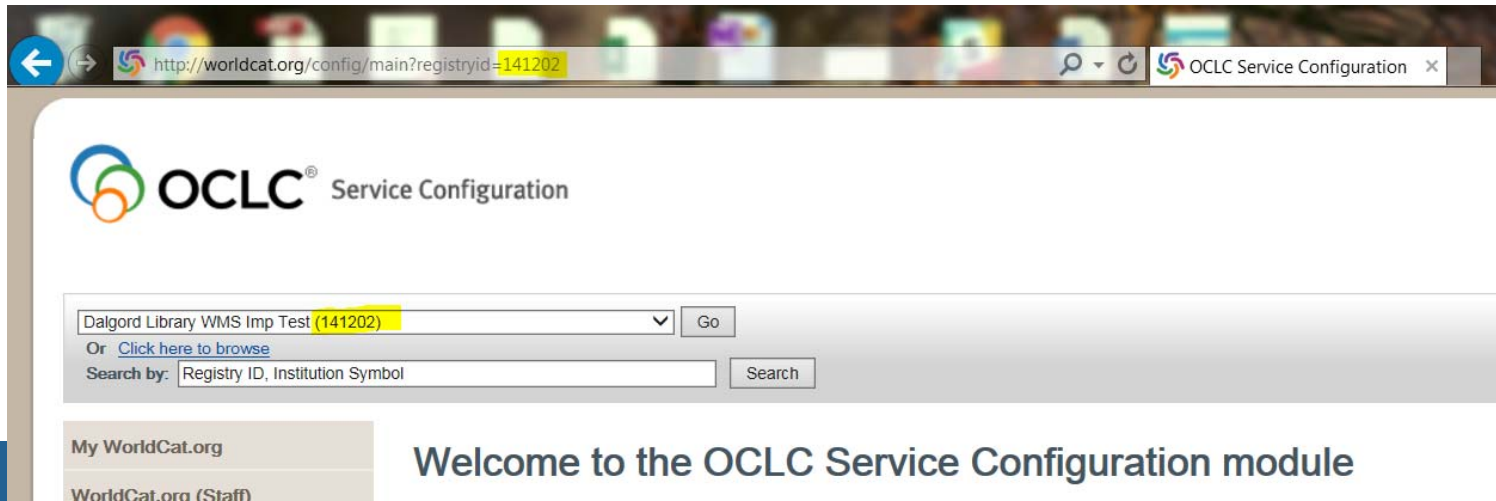
- Use WorldShare Analytics [Patron Information Detail Report](#) or FTP reconciliation report titled [Circulation Patron Full](#)
- Isolate to patrons you would like to delete by using expiration date, patron last modified date, etc.
- Copy patron barcode into bulk patron delete template and add institution ID (WorldCat registry ID) for all records
- idAtSource/SourceSystem are concatenated in reports, avoid using

Tipasa Libraries

- Request list from 3rd party system, such as ILS or campus system
- Or within Interlibrary Loan, use the 'Find patrons' search with number of rows set to 200 to copy and paste ILL Identifier column into bulk patron delete template and add institution ID (WorldCat registry ID)

What is my institution ID aka WorldCat Registry ID?

- Login to OCLC Service Configuration
- Displays after your library name:



The screenshot shows a web browser window with the URL <http://worldcat.org/config/main?registryid=141202>. The page title is "OCLC Service Configuration". The OCLC logo is visible in the top left. Below the logo, there is a search bar with a dropdown menu showing "Dalgord Library WMS Imp Test (141202)". To the right of the dropdown is a "Go" button. Below the dropdown, there is a link "Or [Click here to browse](#)". Below that, there is a search bar with the text "Search by: Registry ID, Institution Symbol" and a "Search" button. At the bottom of the page, there is a navigation bar with "My WorldCat.org" and "WorldCat.org (Staff)" on the left, "Welcome to the OCLC Service Configuration module" in the center, and the OCLC logo on the right.

What is my institution ID aka WorldCat Registry ID?

- Directory of OCLC Members
<https://www.oclc.org/en/contacts/libraries.html>
- Search for your library
- Under Identifiers or found at the end of the URL

Tips from the data team

- Review your file prior to submitting to OCLC to ensure:
 - File name conventions are correct - include the word 'delete'
 - Your file has been saved in the correct format .txt or .xml
 - If sending tab-delimited, you have the columns and header present, in the correct order and spelled correctly
 - If sending XML, you have validated your file against the XSD

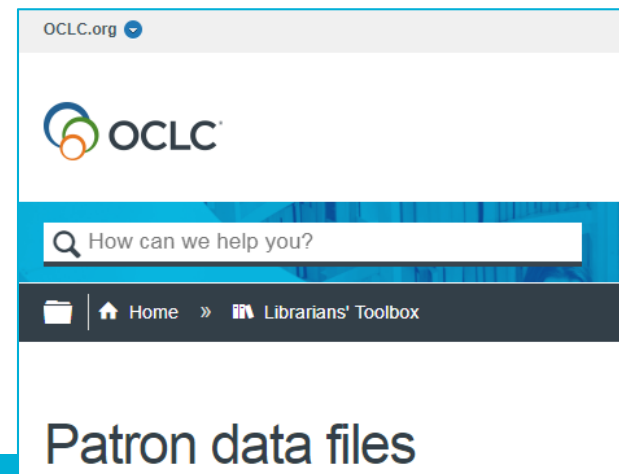
RESOURCES

Resources

Librarians' Toolbox - Help Site

[oclc.org/patrondatafiles](https://oclc.org/oclc/patrondatafiles)

- Tab-delimited and XML bulk delete templates
- Requirements documentation
- Sample patron files
- Matching rules for patron data



QUESTIONS?

Thank you!

For assistance, please contact your regional support office:

<http://oc.lc/support>

**Because
what is
known must
be shared.SM**