



Sitka

Cultivating and Pruning Your Patron Records: Patron Maintenance in Evergreen

Tips

- Know what patron profiles your library uses and what you use them for
 - Ask Co-op Support to set up your permission tree so you only see profiles you use
- Invalidate emails, phone numbers, and addresses that are no longer correct
- Review your statistical categories on a regular basis to ensure the values are correct and the data you're collecting is still relevant.
- Decide how long you keep expired patrons and delete them after that period has passed
- Make sure to include a [working location](#) when setting up new staff accounts
- Close staff accounts for people who no longer work at the library

Documentation

Updating Patron Accounts

<http://docs.libraries.coop/sitka/UpdatingPatronAccounts.html>

Invalidating an Email Address

<http://docs.libraries.coop/sitka/UpdatingPatronAccounts.html#InvalidatingAnEmailAddress>

Statistical Categories Editor

<http://docs.libraries.coop/sitka/StatisticalCategoriesEditor.html>

Merging Patrons

<http://docs.libraries.coop/sitka/MergingPatrons.html>

Patron Self Registration

<http://docs.libraries.coop/sitka/PatronSelfRegistration.html>

Patron Deletion Tool

<http://docs.libraries.coop/sitka/DeletePatronCard.html>

Staff Accounts

<http://docs.libraries.coop/sitka/LibraryStaffAccounts.html>

Reports

(Sitka_templates -> Patrons -> Patron Count)

- Total Patron Count
- Patron Count by One Stat Cat
- Patron Count by Profile Group then by one Stat Cat
- Patron Count by Two Stat Cat Combination

(SITKA_templates -> Patrons -> Patron List)

- Patrons with Blank Value in a Stat Cat
- Patron List with Selected Stat Cat Values
- Patron List by Expiration Date
- Patron List by Expiration Date and Profile
- Patron List with Full Details by Profile Groups