

## WORKING WITH PATRONS: RECONCILING PATRON RECORDS WITH A TEMPORARY BARCODES WITH A NEW PATRON RECORDS WITH CORRECT BARCODES

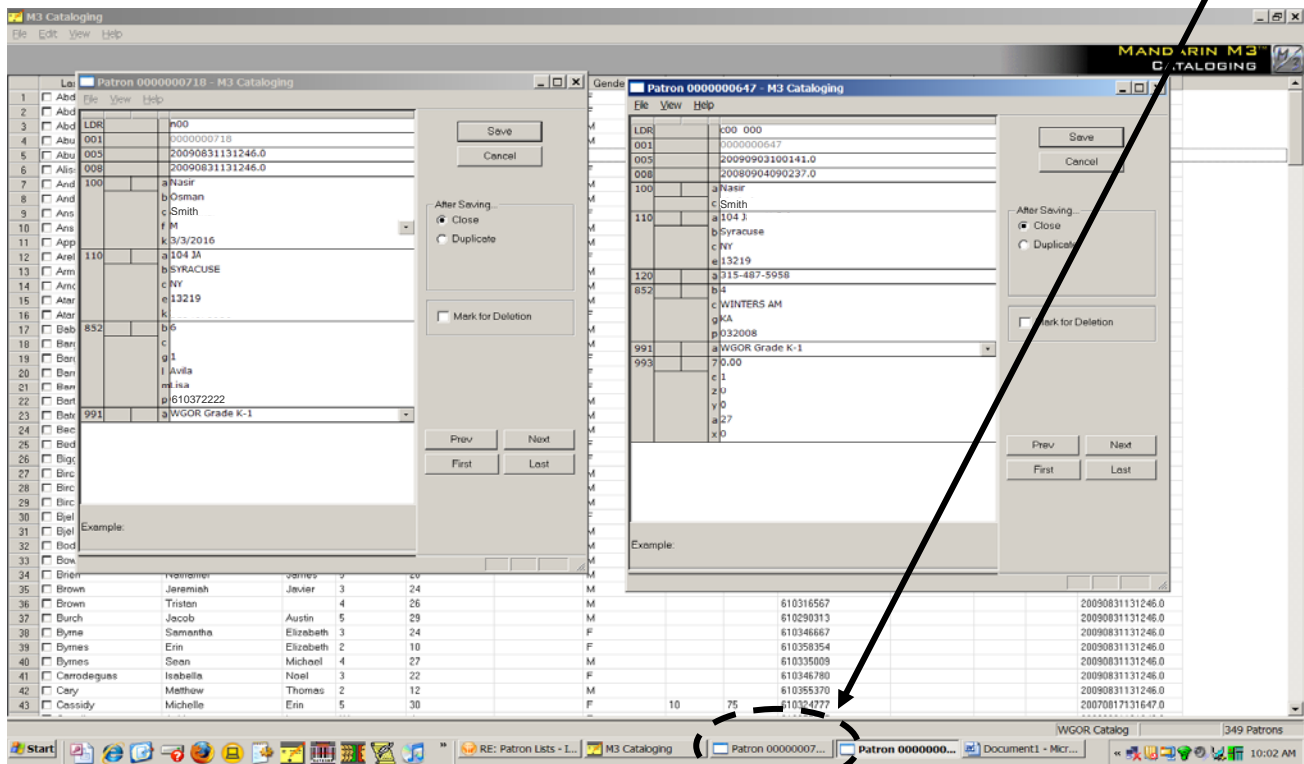
This happens often at the beginning of a school year. New patrons have been uploaded into your catalog and you come up with 2 duplicate John P. Smiths. Same person, but one record has his **temporary barcode** with his history, which you want to keep and put with his **correct barcode** and all the other up-to-date information.

- If you don't care about the history, **Delete** and **Purge Select** the old patron record and use the new/good one.

The following directions assume that there are **NO Outstanding Loans**:

	Last Name 100/c	First Name 100/a	M Name 100	Grade 852/g	HM RM 852/b	Teacher 852/c	Gender 100/f	Loans 993/x	All Loans	Barcode
1	<input type="checkbox"/> Ab	Janine	I	2	9		F			
2	<input type="checkbox"/> Ab	Nadine	I	3	23		F			
3	<input type="checkbox"/> Ab	Wesam	I	5	28		M			
4	<input type="checkbox"/> Smith	Nasir	Osman	1	6		M			610372222
5	<input type="checkbox"/> Smith.....	Nasir		KA	4	WINTERS AM		0	27	032008

Open up **BOTH** copies of the record – when you've opened up the 2<sup>nd</sup> record, the first may “disappear”, it hasn't. Simply go to your toolbar at the bottom of the screen and click on the 1<sup>st</sup> “Patron Record” so that you see both of them.



### OLD/Original Patron Record

- If there is an **FIELD** or **SUBFIELD** you want to replace:
  - RIGHT CLICK** on it
  - Select **DELETE FIELD** OR **DELETE SUBFIELD**

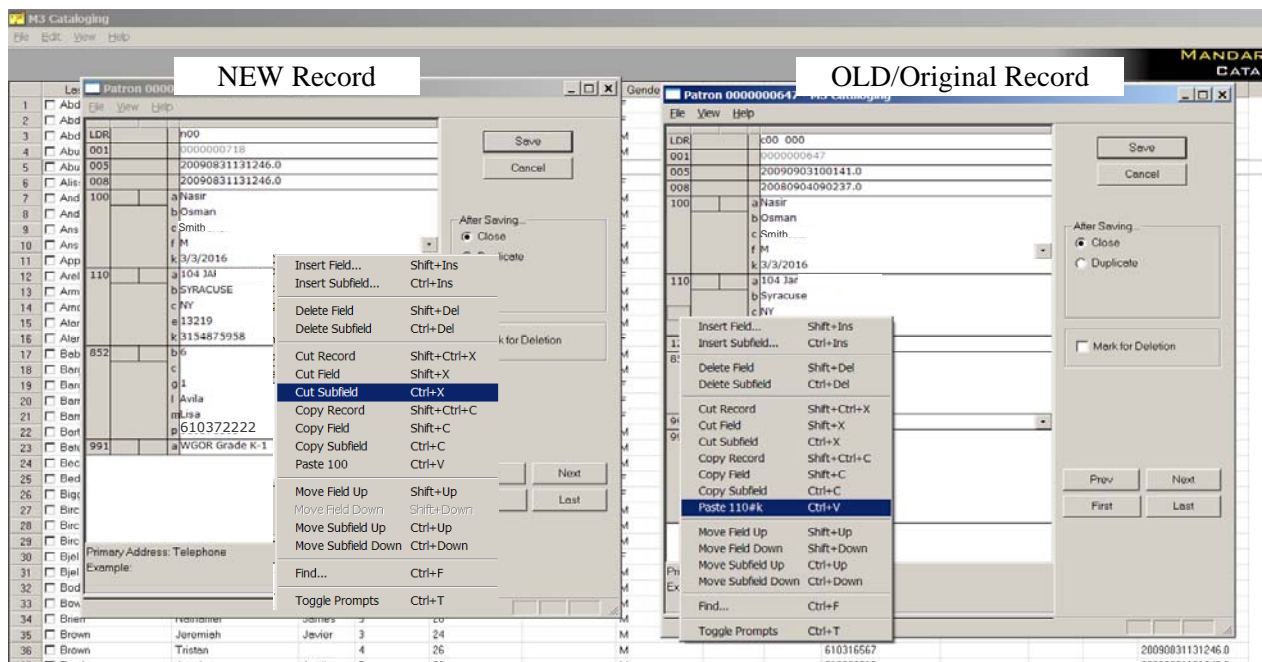
### NEW Patron Record

- RIGHT CLICK** on the **FIELD / SUBFIELD** that contains the **NEW Information** you want to put in the **OLD Record**.
  - Here it's the phone number in the 110#k subfield.
- Select **CUT SUBFIELD** or **COPY SUBFIELD** (either will work) OR Cut / Copy Field (depending on what info. you want)

## OLD/Original Patron Record

1. **RIGHT CLICK** into the **110 Field** and select **PASTE 110#K** (If you wanted to replace the whole field it would be Paste 110)
2. Subfield will be inserted.

*If you need to replace the whole field than use the directions below that are written for replacing the 852 information*



## REPLACING THE 852 INFORMATION OR A WHOLE FIELD

### OLD/Original Patron Record

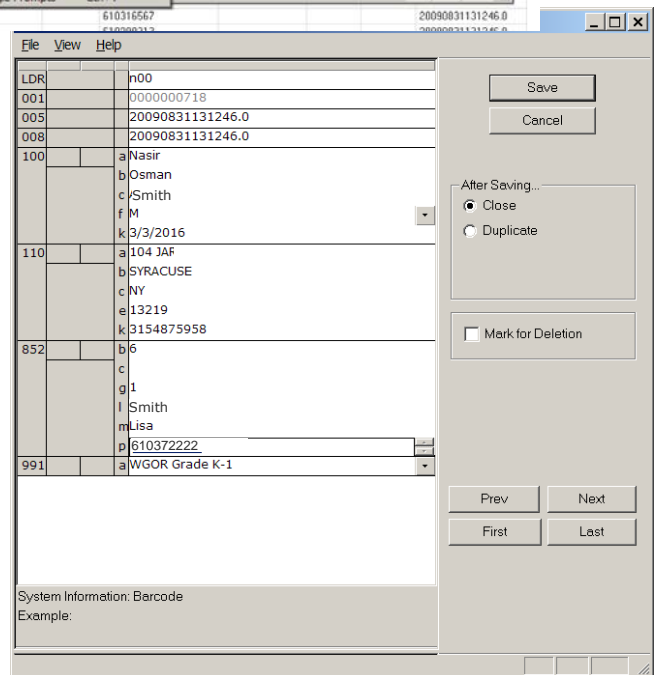
1. **RIGHT CLICK** on 852
2. Select **DELETE FIELD**

### NEW Patron Record

1. **RIGHT CLICK** on the 852
2. **COPY FIELD**

### OLD/Original Patron Record

1. **RIGHT CLICK** into the **OLD Record**
2. Select **PASTE 852** - Field will be inserted
3. Go back and **DELETE THE BARCODE** from New record
4. **SAVE** both records.
5. Bring up the newly edited patron record in **CIRCULATION** and **CHECK THE HISTORY**.
6. If correct, than **DELETE** and **PURGE SELECT** the record with no barcode in **CATALOGING**



1. Open **M3 CATALOGING**
2. Do a **SEARCH** to bring up **PATRON RECORD(S)**
3. **CLICK** the **CHECKBOX NEXT TO NAME(S)**
4. **RIGHT CLICK**, Select **DELETE SELECTED RECORD(S)**

1. **CLICK** the **CHECKBOX NEXT TO NAME(S)**
2. **RIGHT CLICK**, Select **PURGE SELECTED RECORD(S)**

If you get a message saying "*Patron cannot be purged... Open transactions*"

Please see directions about **Completing a Transaction / Paying a Fine**