

3.8 BATCH DELETION OF DATA ON INACTIVE MEMBERS

Starting with the COBISS3/Loan, V4.5-01 software version (November 2008), it is possible to individually delete data on inactive members (**Member / Delete member details** object method), whereby inactivity is established by a librarian. Batch deletion of inactive members, however, is performed on the basis of a programme algorithm that defines which member fulfils the condition for deletion from the library's records.

There are two procedures available for batch deletion of inactive members:

- batch deletion of data on *all* inactive members
- batch deletion of data on *specific* inactive members, which are selected by the library

This procedure is available for easier transition to the daily deletion of data on all inactive members and for deletion of data on inactive members, for which no data on membership validity exists.

3.8.1 Batch deletion of data on all inactive members

Batch deletion of data **on all** inactive members is in accordance with:

- requirements of Article 15 of the Librarianship Act ZKnj-1 (Official Gazette, 87/2001) and Article 21 of Personal Data Protection Act PDPA-1 (Official Gazette 86/2004)
- the information commissioner's interpretation
 - in the SLA publication (23 October 2007) before the SLA session: *To all libraries! Subject: Personal data protection in libraries;*
 - in the on-line publication of the Library News Supplement (2007, (17) 4–5): *"This means that data on inactive members – users, whose membership expired more than a year ago and they no longer have any debts with the library must be regularly deleted".*

The algorithm for batch deletion was confirmed by the National Council for Librarianship (23 April 2008) at their 27th session and later also by the information commissioner in the letter dated 6 May 2008.

When batch deleting inactive members, the members who simultaneously fulfill the following three conditions will be deleted:

Precondition

1. **A member has not visited the library for more than a year.**

A "visit" means any activity in the library (loan, renewal, return, etc.), any activity within the My library service through COBISS/OPAC (renewal, reservation, reservation cancellation, changing the password, or notification

parameters), loan renewal via answering machine or successful member authentication (entering membership card number and password) when logging in to other servers (access to external e-resources). Only members for whom it is recorded under transactions that the date of their last “visit” is sooner or the same as the date of deletion minus one year will not be deleted from the database on members.

If the date of the last visit is empty and other conditions are fulfilled, the data on the member will be deleted. The date of the last visit can be empty as the member was registered by transferring data on members from the excel file.

2. **A member has no debts with the library.**

A member has no debts with the library when nothing of the following is recorded in any department for the member:

- material (on loan, reserved, etc.)
- debt
- note
- pending ILL request or material from pending ILL requests

3. **A membership for the member has expired a year or more ago.**

Membership validity is defined in one of the following two ways:

- If a library updates the “Membership expiry date” field under member details, the date entered will be taken into account.
- If a library updates the “Date of entry/membership renewal” field under member details, the membership expiry date will be calculated by adding to this date one of the following values:
 - membership validity period, entered under “Membership validity” for an individual member
 - membership validity period for all membership categories or an individual membership category that was defined by the library using the **Home library / Restrictions on operations** method; the period is added only for the members who have no value entered under “Membership validity”
 - default period of one year, if the **Membership validity** table is empty and no other period is defined under “Validity period” for the member

If a library does not update data on membership validity for a member (there is no data under “Membership expiry date” and “Date of entry/membership renewal”), a membership for this member will not expire (it is permanent, lifelong). This member will not be automatically deleted from the database, even if he/she fulfils both first conditions for deletion – i.e. the member has not visit the library for more than a year and he/she has settled all debts with the library.

When deleting data on (inactive) members, the members who are not natural persons will be exempt from deletion (category *124 – institution's*)

organizational units, 125 – legal entities – ext. institutions and 126 – interdepartmental loan units).



Note:

To batch delete data on inactive members, the privilege LOAN_DEL_INACT – Batch deletion of inactive members is required.

Procedure

1. Highlight the **Member** class and select the **Class / Batch deletion of all inactive members** method.

2. In the **Deletion of inactive members** window you can specify:

- Sorting of data on report

From the drop-down list, select the value that you wish the inactive members in the lists, which are prepared during deletion, to be sorted by. The default value is *Surname*, whereby the values will be sorted by surname and name. In libraries with departments, inactive members will always be sorted first by department ID under "Department", and after that also by the selected value.

- Execution time

If you wish the deletion procedure to be carried out later, enter the date and time that you wish the procedure to be performed. If you leave the parameter empty, the deletion procedure will be performed immediately.



Note:

In the algorithm for determining a member's inactivity, the current date will always be taken into account, even if the execution time is different from the current date.

3. Click the **OK** button.

The **Deletion of inactive members** window will open. In the window, a short statistics of deletion of inactive members will be displayed:

- number of all members
- number of members, whose membership expired a year ago, or sooner
- number of members, where the »Membership expiry date« attribute is empty
- number of members, where a year or more has passed since their last visit
- number of inactive members, who will not be deleted as they are not, according to the category data, natural persons
- number of inactive members who will not be deleted as material is recorded for these members

- number of inactive members who will not be deleted because pending ILL requests or material from pending ILL requests are entered for the members
 - number of inactive members who will not be deleted as they have not settled their debts
 - number of inactive members who will not be deleted as a note is entered for these members
 - number of inactive members who will be deleted
4. If you wish to continue the procedure, click the **OK** button.

Two control lists will be prepared:

- a list of members who will not be deleted in the procedure as they have not settled their debts with the library (entered material, outstanding debts, entered pending ILL requests) or a note is entered for the members
- a list of members who will be deleted

The prepared lists can be viewed and printed to a printer. You can also print them later in the COBISS/Reports software module, where they will be automatically saved. You can find them in the *Loan* folder, if you select **Browse stored reports** in the menu under **Creating reports**. A window containing a list of prepared reports will open. A file name contains the date and time of the report creation.

5. After printing or previewing the prepared lists, the **Deletion of inactive members** window will open.

Click the **OK** button to confirm deletion of inactive members.

After deleting data on inactive members, the membership card numbers of deleted members will remain unavailable and you will not be able to assign them to new members.



Tip:

If you start the procedure with a delayed execution time and the deletion has not started yet, you can cancel it by selecting the **Class / Cancel deletion of inactive members** method in the **Member** class. When the procedure is done, you will receive a notification to your e-mail address, which was entered under your username.

3.8.2 Batch deletion of data on selected inactive members

When deleting data on selected inactive members, a library can choose the criteria to be taken into account in deletion. Deleting data on *selected* inactive members will be different from deleting **all** inactive members in the following:

- instead of selecting all members, select only a specific group of members, where you can automatically check whether all inactivity conditions are fulfilled
- as an inactivity criteria, you can set any number of years since the last visit, whereby the number of years must be 2 or more
- a condition related to membership expiry will not be considered (data will not be deleted, even if the membership expired a year or more ago)
- a condition related to a membership category will not be considered (data on non-natural persons, if they are among the selected members, will also be deleted)

When batch deleting data on selected inactive members, the members who fulfil all three of the following conditions will also be deleted:

Precondition

1. A member has not visited the library for a longer period of time than the selected number of years.

A "visit" is considered any activity in a library (loan, renewal, return, etc.), any activity in the My library service within COBISS/OPAC (renewal, reservation, reservation cancellation, changing the password or notification parameters), loan renewal via answering machine or a successful member authentication (entering membership card number or password) when logging in to other servers (access to external e-resources). Members that you selected in the search window and whose date of their last visit to the library is before the current date, minus the selected number of years (at least two years) will be deleted from the database on members.

If the date of last visit is empty and other conditions are fulfilled, the data on members will be deleted. You can leave the date of last visit empty as the member was registered by transferring data on members from the excel file.

2. A member has no debts with the library.

A member has no debts with the library when none of the following is recorded in any department for the member:

- material (on loan, reserved, etc.)
- debt
- note
- pending ILL request or material from pending ILL requests

3. A member's membership has expired or no data on the membership validity exists.

The membership expiry date is not greater than the current date. If the membership expiry date is empty and the member fulfils other conditions for deletion, the data on this member will be deleted.



Note:

To batch delete data on selected inactive members, the privilege CIR_DEL_INACT – Batch deletion of inactive members is required.

Procedure

1. Highlight the **Member** class and select the **Class / Batch deletion of selected inactive members** method.
2. In the **Deletion of inactive members** you can specify:
 - Number of years from the last visit
As inactivity criteria, enter the number of years since the member's last visit to the library. As the number of years must be more than 1, the default value of the parameter is 2.
 - Sorting of data on report
From the drop-down list, select the value by which you wish the inactive members in the lists, which are prepared during deletion, to be sorted by. The default value is *Surname*, which means that the values will be sorted by surname and name. In libraries with departments, inactive members will always be sorted first by department ID under "Department", and after that also by the selected value.
 - Execution time
If you wish the deletion procedure to be carried out later, enter the date and time of the procedure to be performed. If you leave the parameter empty, the deletion procedure will be performed immediately.

**Note:**

In the algorithm for determining a member's inactivity, the current date will always be taken into account, even if the execution time differs from the current date.

3. Click the **OK** button.
The **Search – Member** window will open, where you can search for members to be deleted. You can select members by clicking the **Select all** or **Select** button, if you selected only some of the members from the hit list.
4. The **Deletion of inactive members** window will open.
A short statistics of deletion of inactive members will be displayed in the window:
 - number of selected members
 - number of members who have not visited the library for the selected number of years or more
 - number of inactive members who will not be deleted as material is entered for the members
 - number of inactive members who will not be deleted as pending ILL requests or material from pending ILL requests is entered for the members
 - number of inactive members who will not be deleted as they have not settled their debts yet

- number of inactive members who will not be deleted as a note is entered for the members
 - number of inactive members who will be deleted
5. If you wish to continue the procedure, click the **OK** button.

Two control lists will be prepared:

- list of members who will not be deleted as they have not settled their debts with the library (entered material, outstanding debts, entered pending ILL request) or a note has been entered for the members
- list of members who will be deleted

The reports can be viewed and printed to printers. You can also print them out later in the COBISS/Reports software module as they are automatically saved. You can find them in the *Loan* folder, if you select **Browse stored reports** in the menu under **Creating reports**. A window containing a list of prepared reports will open. A name of the file contains the date and time of the report creation.

6. After printing or viewing the prepared lists, the **Deletion of inactive members** window will open.

By clicking the **OK** you confirm the deletion of data on inactive members.

After deleting the data on the selected inactive members, membership card numbers of the deleted members will not become available and you will not be able to assign them to new members.



Tip:

If you start the procedure with a delayed execution time and the deletion has not started yet, you can cancel it by selecting the **Class / Cancel deletion of inactive members** method in the **Member** class.