"Forgive and Forget": Cleaning House with Circ Jobs 39 and 42

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“Forgive and Forget”
Cleaning House with Circ Jobs 39 and 42
The Plan

• Why run these jobs?
• Batch Fine/Fee Forgive jobs
• Batch Patron Purge job

Why run these jobs?
Batch Fine/Fee Forgive jobs
  What they are
  How to run them
  Reports
Batch Patron Purge job
  What it is
  How to run it
  Reports
Why run these jobs?

- Clean out records that have ssn’s – hopefully gone already!
- Remove fines or fees that are beyond the statute of limitations (in Kentucky it is 5 years)
- Free up space on your server
There are 3 different Batch Fine/Fee Forgive jobs.

They are all useful, but you may not find a use for them all in your institution.
The first is Circjob 40. You identify a group of patrons, by their Patron ID and Voyager forgives the fines in the corresponding Patron records.

- **-i operatorID** = up to 10 alphanumeric characters (required)

  We generally use SYSTEM for ours

- **-t = run in test mode (optional)**

- **-p forgive.txt** = input file name (required) preceded by location/path if different from /m1/voyager/xxxdb/local
-L = forgive fines from these Circulation locations (optional) that were created during this time period.
The default is All.
To specify multiple location codes, enter them separated by commas.

Location codes with spaces must be entered with quotation marks to process successfully as in the following:

Pcircjob -j41 -i operator99 -L “Course Reserves” –s 2008-12-29 -e 2008-12-31

! IMPORTANT:
The location code must be typed exactly the same (including uppercase/lowercase punctuation) as it is stored in Voyager System Administration.
Voyager System Administration permits codes with the same spelling but different uppercase/lowercase usage to be stored concurrently. For example, law, Law, and LAW may all be valid location codes stored concurrently in Voyager System Administration.
You can forgive the fines for patrons in a particular **circ happening location or locations** with a particular **range of patron record expiration dates**.

With all locations if no –L values
With all patron groups if –g isn’t included.
Other Ways to Run These Jobs

- **Manually** from command prompt
  - In same directory ( `/m1/voyager/xxxxdb/sbin`)
    - Type `circjob`, when it asks for job number type it in
    - Go through the parameters one at a time
- **WebAdmin** (If available)
  - Usually use your OPAC url with `/webadmin/`
    - example [http://opac.uky.edu/webadmin/](http://opac.uky.edu/webadmin/)
  - Logon
  - Select the Circulation Reports and Notices

You can run the batch forgive job manually stepping through the parameters

or use WebAdmin, if you have it set up.

Log on and select the batch fine job that meets your needs.
This is the main screen for WebAdmin on Voyager 9.0.0.

These jobs are in the Reports and Notices, and they have been in the system since Voyager 7.0.3, I believe.

I have used WebAdmin to run the Fine Forgive job, since I only run it once a year.
These are the three Batch Forgive jobs.

I know you probably cannot see the detail, but you can see there are options.

For this job, running it LIVE is the default, so be sure to check the “Run in Test Mode?” box, the first time so you can be sure you are forgiving the correct group of fines.

From EXPERIENCE, I can tell you the results are UNFORGIVING, if you accidentally put in the wrong dates, as I did a few years ago.
Reports for Batch Forgive Jobs

Look in the /m1/voyager/xxxdb/rpt directory

- **circjob.log** -- any problems running the job
- **err.forgive.YYYYMMDD.HHMM** – patron information and error description
- **log.forgive.YYYYMMDD.HHMM** – audit report for batch forgive jobs

These are the three batch forgive jobs.
I've never had any problems with the job running, so I cannot tell you what error messages you might see.
Since UK has never had any data in the err.forgive file, I can’t show an example from our database.

Report includes:
- patron ID
- patron last name
- patron first name
- error description

“Errors include issues retrieving patron IDs or forgiving eligible fines.” Technical Manual, v7.1, p.8-32; v9.0, p.9-29
This is where you see what really happened. You can run this data into an Access database or Excel spreadsheet and look at it deeper, but the file is readable and searchable in a text editor.
Geoffrey Patron has been in the system since 2001, and hasn’t used the library since 2003.

I’ve run this job about ten times over the years. The $39,366.05 doesn’t surprise me much.
In the Circ Client, the program uses BATCH FORGIVE as the Posting Type. The records move from the Outstanding to History tab.

The create date was January 2, 2004 and the Batch Forgive was June 5, 2009.

Over 5 years from the create date.
We still have addresses and phone numbers for Patrons, so it is important to weed these records out on a regular basis. We run this job every Sunday morning at 6:00 AM, unless I get word to stop it for awhile.
Do you want to delete patrons who have historical fines? (Ones that have been paid, forgiven or erred out)

If so, check the box in Voyager System Administration client on the Circulation> Miscellaneous screen.
We’ve been running Pcircjob 39 for almost as long as it has existed. We first started running it to delete patrons, to lessen the number of patrons with SSNs in our system. We’ve since solved that problem.

Now we have to lessen the number with drivers license numbers! --We have to fix that one manually.

Anyway, we don’t have our patrons in XML format, so I can’t tell you much about the Ppatronprg job, other than to say it is well-documented in the Technical Users Guide. There is a way to run it in WebAdmin as well.
The purge program doesn’t use a parameter to tell it to run in TEST MODE. It runs in test mode by DEFAULT.

It uses a parameter to tell it to run for REAL.

This is a GOOD THING. (I wish they’d written the Fine/Fee Forgive programs the same way.)

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<table>
<thead>
<tr>
<th>In TEST Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Go to <code>/m1/voyager/xxxdb/sbin</code></td>
</tr>
<tr>
<td>• Enter one of the following commands:</td>
</tr>
<tr>
<td>- <code>Pcircjob -j 39</code></td>
</tr>
<tr>
<td>• uses system date (~today) and compares it to PURGE date</td>
</tr>
<tr>
<td>- <code>Pcircjob -j 39 -a YYYY-MM-DD</code></td>
</tr>
<tr>
<td>• looks at PURGE date</td>
</tr>
<tr>
<td>- <code>Pcircjob -j 39 -a YYYY-MM-DD -b</code></td>
</tr>
<tr>
<td>• looks at EXPIRE date</td>
</tr>
</tbody>
</table>
In Production Mode – For Real!

• Go to /m1/voyager/xxxdb/sbin
• Enter one of the following commands:
  – Pcircjob –j 39 –z
  – Pcircjob –j 39 –a YYYY-MM-DD –z
  – Pcircjob –j 39 –a YYYY-MM-DD –b –z

If using classic SIP loader for patrons, you will need the –y in the command. If using XML loader, you will not need it.

It just takes the –Z to delete the old patron records.

Add the –z parameter to run the Purge job for REAL!
Add it to Your Crontab

- Go to `/home/xxxdb` or wherever your crontab lives
- Enter the following command:
  ```
  crontab -e
  ```
- Go down to the place in your crontab job listing where you want to add the purge job.
Once you have run the purge job a few times and trust it, you can set up your cron job and let it run for real.

THE –z MEANS RUN FOR REAL!!!!
When and How Often?

Translation of 15 6 * * 0

15 means 15 minutes after the hour
6 means 6:00 AM
* means Every Week
* means Every Month
0 means on Sunday
This is what my cron job looks like.

By adding a pipe and the email message and my email address, I get an email from the server with the subject line that appears in quotes in the job parameters.

We use the purge date, which is one year after the expire date in our patron records.

I was very excited when Ex Libris added the ability to have the dates automatically added when manually adding a new patron into the system.

Our students were not always very good about adding the dates in, as instructed. Now they don’t have to think about it.

We are still running reports to see where the records with no Expire or Purge dates are hiding.
You can also run this job from WebAdmin. The SIF job and XML job parameters are shown here. Extremely small.
If you use demerits, they will have a separate file, instead of finesfees.

Universal Borrowing has ub files for these as well.

This information can be found in the Technical Manual.
We don’t have Universal Borrowing, so there are no UB reports in our lists.

I’ve captured an old set of reports, to show the titles of the report files. The dates are for old runs.
These are the formats of the reports. The patron.purge.log is the one that tells you what happened—which patrons were deleted and which were not, along with the reasons.

There are files for the NOT DELETED reasons, with all the patrons that were not deleted for that reason. The information in those files is in the raw patron record format.

I do not bother with the current charged items or fine/fee exceptions. We want those to stay in the database.
In circjob.log

Sun Jun 7 06:15:00 2009 Patron Purge...

Patron Purge Statistics:

---------------------------------
Total patron records selected from database: 6860
Total patrons eligible for deletion: 1344
Total patrons deleted: 1344
Total errors: 0

Sun Jun 7 06:17:50 2009 ...COMPLETED

This is the statistical information in the circ.log file.

After a semester ends these numbers are much higher.

This job ran in about 3 minutes.
Remember Geoffrey J Patron.

With the delete patrons with historical fines box checked,

when his purge date comes up, he is history!

I took an actual section from a report and substituted my test patron names, for example.
Here are the details of how I turn the text purge log into an Excel spreadsheet.

**Working with the patron.purge.log**

- Raw data file is readable
- Can be imported to Excel or Access for sorting
- Add the .txt extension to the log file name

In Excel using the Text to Import Wizard:

Step 1 – File type is Delimited.
Step 2 – Delimiter is Other: | (pipe character)
Step 3 – Change every column heading to Text
Here is how I sort the spreadsheet first.

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Circulation Batch Jobs - Fine.Fee Forgive and Patron Purge

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All the DELETEDs have risen to the top of the spreadsheet.

Copy the Reason PatronID and Lastname column cells for the DELETED and paste by highlighting the 1st cell under the Patron ID to get all the IDs lined up. The Last names and first names will be in line with the Not deleteds.

Or if you don’t care, just delete all the DELETEDs. The problems are the NOT DELETEDs.

Now you can attack those problems! 😊
This is a not a pretty report format, but the information to find the person is in there. The LOG FILE is your best bet for dealing with problems. Use it to find the patron and go from there.
Thanks for your time.