Troubleshooting Patron Data Import Problems

**DISTRICT EXPECTATIONS**

- Do not manually add or update information for students and school staff patrons in Destiny
- Perform regular patron database cleanup as instructed by the LME department
- Work with the school’s Cobb Student Information System (CSIS) contact person to investigate and correct errors with student and staff patron information. (If you are unsure who your CSIS contact is, ask an administrator).
- Wait one day after a change is made in CSIS, and then verify that the updated information is being imported correctly into Destiny.

Student and school staff patrons are imported from the Cobb Student Information System (CSIS) every night. The nightly patron import process also deletes most, but not all, inactive patrons. This patron data import is one-way; information for all current students and school staff is imported into Destiny each night, but changes made in Destiny are not transferred back to CSIS. Most changes made to active student and staff patrons in Destiny will be overwritten the following night; in order to correct information errors for active patrons in Destiny, those changes must be made in CSIS.

Library media staff must work with their school CSIS contact to make any necessary changes to student and school staff data in CSIS. After the changes are made, the updated information will appear in Destiny the following day. The following steps will help library media specialists and CSIS staff resolve patron import problems.

**Which Type of Patron Data Problem Are you Experiencing?**

- A **student** at my school is not appearing in my list of patrons.
- A **staff member** at my school is not appearing in my list of patrons.
- A patron who is no longer at my school is still in my list of patrons.
PROBLEM: A student attending my school is not appearing in my list of patrons.

Begin by taking the following actions:

1. Check to see if the student is listed under another school in the Destiny patron database. (Go to the check-out screen in Circulation, un-check “Only my patrons” and search for the student.)

2. Use the Student Patron Data Form to collect his or her vital information for further investigation.

3. If you wish, you may check out items to the student before investigating the problem further. If the student is in Destiny at another site, you can simply check materials out to the student at that school. If the student does not appear in Destiny, you can use the Temporary CheckOut Form to record any items you check out to him or her at this point.

Based on the information collected on the form, decide how to proceed:

- If the student is in a special program (e.g., merit program, ILL, HAVEN) and appears in Destiny at his "home school," you can just check materials out to the student at that school. No further action is necessary.

- If the student has only been enrolled at your school one day, hold on to the completed student data form and check Destiny the next day. His information should be imported the following night.

- If the student has been enrolled at your school for at least two days and his Destiny patron account is still missing or incorrect, meet with your school's CSIS contact person to investigate the problem:
  - Verify that the student is enrolled at your school in CSIS
  - Verify that the student's data has been correctly entered in CSIS.
  - Verify that the student has been withdrawn from all other schools in CSIS. (If not, your school's CSIS contact will need to work with the CSIS contact at the other school to have the student withdrawn there.)
  - Instructions for CSIS staff on how to add/edit student records are online: http://academicportalproject.cobbk12.org/UserDocumentation/tabid/103/Default.aspx
    - Any changes made to the student's record in CSIS will not appear in Destiny until the following day. After the CSIS contact person makes any changes, wait until the following day, then check Destiny to see if the problem has been resolved.

If all the students’ data has been verified to be correct in CSIS, but his patron data is still not importing correctly, submit a Web Help Desk Service Request to have the problem investigated by the district CSIS staff.
PROBLEM: A staff member at my school is not appearing in my list of patrons

Begin by taking the following actions:

1. Check to see if the employee is listed under another school in the Destiny patron database. (Go to the check-out screen in Circulation, un-check “Only my patrons” and search for him.)

2. Use the Staff Patron Data Form to collect his vital information for further investigation.

3. If you wish, you may check out items to him before investigating the problem further. If the employee is in Destiny at another site, you can simply check materials out to him at that school. If he does not appear in Destiny, you can use the Temporary CheckOut Form to record any items you check out to him or her at this point.

Based on the information collected on the form, decide how to proceed:

- If he does not appear in Destiny for one of the following reasons, you will need to manually enter his patron information:
  - He is a substitute teacher, a contract employee, or otherwise not a “regular” employee (does not have a CCSD badge number)
  - He is an itinerant or district-level employee, not assigned to a specific school in CSIS

- If he is a school based employee who works at multiple schools and appears in Destiny under one of the other schools, you can just check materials out to him at that school. No further action is necessary.

- If he is a regular school employee and his Destiny patron account is still missing or incorrect, meet with your school's CSIS contact person to investigate the problem:
  - Verify that the employee is assigned to your school in CSIS.
  - Verify that the employee's data has been correctly entered in CSIS.
  - Verify that the employee has been correctly end-coded from all other schools in CSIS.
  - Instructions for CSIS staff on how to add/edit staff records are online: http://academicportalproject.cobbk12.org/UserDocumentation/tabid/103/Default.asp
  - Any changes made to the employee's record in CSIS will not appear in Destiny until the following day. After the CSIS contact person makes any changes, wait until the following day, then check Destiny to see if the problem has been resolved.

If all the employees’ data has been verified to be correct in CSIS, but his patron data is still not importing correctly, submit a Web Help Desk Service Request to have the problem investigated by the district CSIS staff.
PROBLEM: A patron who is no longer at my school is still in my list of patrons.

Most inactive patrons will either be deleted automatically or will be deleted as part of your normal Patron Database Cleanup. However, if there are patrons who remain in the database even after normal patron database cleanup, you can follow these steps to resolve the problem:

1. Clear any fines owed by the patron and change any items owed by the patron to "lost," then delete the patron in Destiny.

2. If the patron re-appears in Destiny the following day, ask your school CSIS contact to confirm that the student is withdrawn (or the employee is end-coded) in CSIS. Delete the patron in Destiny again.

If the patron re-appears in Destiny after following the steps above, submit a Web Help Desk Service Request to have the problem investigated by the district CSIS staff.