Destiny: Resolving barcode conflicts in the Update Patrons job summary

Follett Technical Support Knowledgebase Informational Article

Applies to:

Destiny – All versions

Summary:

This article contains a review of the "Patron's new barcode '<number>' is already assigned to another patron" and "Barcode <number> already exists at target site" messages that can appear in an Update Patrons job summary.

Detail:

When patron records cannot be added to, transferred to, or associated with a site because of a conflict with an existing duplicate barcode number, Destiny designates them as Invalid in the Update Patrons job summary. The messages that may appear are "Patron's new barcode '<number>' is already assigned to another patron" and "Barcode <number> already exists at target site".

Patron barcode numbers must be unique at each site. Any add or update event that would create records with duplicate barcode numbers within a site is blocked. Two scenarios can cause this situation. In both of these scenarios, the following points are true:

- The incoming XML data is being matched to the Destiny data using the District ID.

- The XML is built with the student's unique ID value populating both the District ID and Barcode fields.

Scenario One: Single record in the district - failed add

In this scenario, Destiny is not able to find a matching District ID. Therefore, Destiny is trying to add the XML information as a new record. However, it is not allowed to add the record because the barcode number already exists at the site.

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This scenario typically results when a patron record is added manually with information in the District ID field that does not match the XML data being loaded. The value for District ID in the manually added record may be different or missing, as shown below.

Tip: You can prevent users from creating patron records that don't have District IDs by requiring the District ID in patron records. Login as the destinyadmin account > Setup > Edit on the district page. Check the box for "Require District ID for patron records" and click Save.

Missing District ID data		Different District ID data	
Existing Destiny record	**Incoming XML data**	**Existing Destiny record**	**Incoming XML data**
Barcode = 12345	Barcode = 12345	Barcode = 12345	Barcode = 12345
District ID =	District ID = 12345	District ID = ID12345	District ID = 12345

How to recognize this situation

In this situation, the data displayed in the job summary is as follows:

Skipped Record 1. Patron Barnes, Brian (District ID: 12345 -- Type: Student)
          Patron's new barcode '12345' is already assigned to another patron.

Notice that there is no Site Short Name value displayed in brackets (as in the second scenario, below). This indicates that Destiny could not find a record in the database at any site that matched the incoming data. The absence of the Site Short Name in brackets means that there is one record in Destiny that needs to be manually updated first in order to successfully update the information via XML.

Resolving the failed add situation

The best practice to fix this error is to edit the existing record already at the site, updating the District ID value to have the correct value (the value from the District ID: XXXXX display in the job summary) and then reload the XML file. Deleting the existing/blocking record is normally not a recommended option as the record usually has outstanding transactions (checkouts).

Tip: Use your browser's **File > Save As** to save the Update Patrons job summary to your computer. Open that file in a separate instance of your browser. Now you will be able to toggle

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between the Update Patron job summary report in one window and Back Office > Manage Patrons in the other. Copy and paste between windows to speed data entry.

1. In the Back Office > Manage Patrons > **Find** box, search for the District ID listed in the report. Normally, one record is returned: the record at the target site that is blocking the loading of the data. Click the edit button.

2. In the **District ID** field, enter the value from the job summary.

3. Click Save.

4. Repeat steps 1-3 for all records skipped in the job summary because of incorrect District IDs.

5. Once the District IDs for all the records have been updated, load the XML data file again to update these records with the current data from the student management system.

Scenario Two: Duplicate record in the district - failed transfer / association

In this scenario, Destiny is able to find a matching District ID value and is attempting to transfer the patron to a new site or associate the patron with an additional site. However, the transfer is blocked because the barcode number in the matched record already exists in the target site.

This scenario typically results when a patron record is added manually with information in the District ID field that does not match the XML data being loaded. The value for District ID in the manually added record may be different or missing.

Tip: You can prevent users from creating patron records with missing District IDs by requiring the District ID in patron records. Login as the destinyadmin account > Setup > Edit on the district page. Check the box for "Require District ID for patron records" and click Save.

For example, in the table above, the incoming data columns represent the record being transferred from site A. The existing record columns represent that data in site B, the target site, which is blocking the transfer.

How to recognize this situation

In this situation, the data displayed in the job summary is as follows:

Skipped Record 1. Patron Barnes, Brian (Barcode: P 12345 [CentralHS] -- Type: Student)
Barcode "12345" already exists at target site.

Notice that there is a Site Short Name value displayed in brackets. This indicates that Destiny found a matching record in the database at the site defined in the brackets. However, Destiny

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was unable to transfer or associate the record from that site. This means that there are two records in Destiny that must first be merged before Destiny can successfully update the information via XML.

Resolving the failed transfer / association situation

The best practice to fix this error is to merge the existing record already in the target site back into the matching record at the current site (the site whose Site Short Name value was displayed in brackets in the job summary). Deleting the existing/blocking record is normally not a recommended option as the record usually has outstanding transactions (checkouts).

For details on merging patron records, see "Merging duplicate patron records" in Destiny's Online Help.

Tip: Use your browser's **File > Save As** to save the Update Patrons job summary to your computer. Open that file in a separate instance of your browser. Now you will be able to toggle between the Update Patron job summary report in one window and the Back Office > Manage Patrons > **Find** box in the other. Copy and paste between windows to speed data entry.

1. In Back Office > Update Patrons > **Merge Duplicates**, search for the barcode number listed in the Update Patrons job summary.
   Normally two records will be returned: the matching record at the current site and the blocking record at the target site. If there are additional records, this indicates that there are older records also in the database that are not being updated by the XML data.

2. Click the Duplicated Patron button next to all listings, and then click the righ pointing arrow in the upper right to continue to the next page.

3. At the top of the page, choose the appropriate association method for the merge:

   o If you want to merge the duplicate patron records together and keep the one patron associated to both sites, choose **Keep all site associations**.

   o If you want to merge the duplicate patron records together, leaving the one patron associated with the preferred record site only, choose **Keep only the primary site association of the preferred patron**.

4. Select the **Preferred Record** option next to the record that correctly displays the student's unique ID number as the District ID.   This should be the record showing the patron's current site (the site whose Site Short Name value was displayed in brackets in the job summary).

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5. Click the Merge Patrons button at the top, and then **Yes** on the confirmation message. The **Job Manager** opens. The Merge Patrons job has merged the records and built an association for the record to the sites.

6. Refresh the page, and then click View to confirm that the merge job completed successfully.

7. Repeat steps 1-6 for all records skipped in the Update Patrons job summary because of this situation.

8. Once the District IDs for all the records have been updated, rerun the update job to load the XML data file again to update these records with the current data from the student management system.

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