Disassociate patron data from circulation events

Learn how to disassociate patron data from circulation events.

Note: This feature is offered on an opt-in basis.

With WorldShare Reports and Report Designer, you can disassociate patron data from circulation events in the Circulation Events universe, Circulation Events Detail Report, and Daily Payments Report. This action removes all Personally Identifiable Information (PII) associated with a patron (e.g., Patron Full Name, Patron Email Address, and Patron Phone Number) from the circulation event. The circulation event and non-PII data (e.g., Event Borrower Category and Event Branch Name) will remain in the system. Disassociating the PII data but maintaining the transaction allows you to continue to track activity trends and perform analysis based on historical circulation events.

Patron data is still maintained and stored in Analytics. For example, patron data associated with current item status (e.g., what patron currently has an item checked out) is still present. So, reports from the Circulation Item Status universe, such as the All Checked Out Items Report and the Overdue Items Aging Report, will still have full patron data associated with the item records. The Circulation Patron Information universe is also not impacted, so the Patron Information Detail Report will still list patrons and their full details. There is also no impact to the Circulation Fiscal Transactions, Circulation Hold Request, and Circulation Scheduled Items universes, as well as the FTP reports.

If you would like to request this feature, contact analyticsfeedback@oclc.org with the information listed below. Upon receipt of your email, the Analytics product team will schedule a meeting with you to provide specific details.

Hello,

I would like to disassociate patron data from circulation events in WorldShare Reports and Report Designer.

Institution information:

• Institution name:
• Library symbol: