Action Item 2: Circulation and Hold Data Retention

Overview:

It is important to archive data in the PINES database periodically for reasons of system performance and patron privacy. Beginning with the January 2016 software upgrade, nightly scripts will be run to archive circulation and hold data that meets certain criteria.

About Circulation Data:

- Information needed for statistical reporting, such as total number of circulations per item, circ staff, workstation, and circulating library, will be preserved as circulations are archived. Some existing reports templates may need to be recreated to account for the archived data.
- Circulation data with outstanding fines or fees, including Lost and Longoverdue circulations, will be retained.
- Library staff will see older circulation information drop off when looking at Item Status > Circulation History and Item Status > Actions for Selected Items > Show Last Few Circulations.
- If the feature to allow patrons to store their own circulation history is approved and enabled, the circulation history for those patrons will be retained indefinitely.

About Hold Data:

- Information needed for statistical reporting will be retained. Some existing reports templates may need to be recreated to account for the archived data.
- Library staff will see older hold information drop off when looking at a patron's account under Holds > Show Cancelled Holds.

Survey Results:

The following summary is based on survey results from 19 PINES Subcommittees and Directors representing 16 library systems. Two questions were asked:

How long should circulation data for closed transactions be retained in the database?

Responses from Subcommittee Members:

Should patrons be allowed to save and retrieve their circulation history?	Responses	Percentage
1 year	4	50%
1.5 years (18 months)	0	0%
2 years	4	50%

Responses from Directors who are not Subcommittee Members:

Should patrons be allowed to save and retrieve their circulation history?	Responses	Percentage
1 year	3	27%
1.5 years (18 months)	2	18%
2 years	6	55%

How long should hold data be retained in the database?

Responses from Subcommittee Members:

Should patrons be allowed to save and retrieve their circulation history?	Responses	Percentage
1 year	6	75%
1.5 years (18 months)	0	0%
2 years	2	25%

Responses from Directors who are not Subcommittee Members:

Should patrons be allowed to save and retrieve their circulation history?	Responses	Percentage
1 year	4	36%
1.5 years (18 months)	3	27%
2 years	4	36%

Comments:

- 2 years to be consistent with the initial "life" of a card.
- A hold is good for up to 6 months. If the hold has been canceled and the patron does not immediately request it again then there is no reason to hold it longer than a year.
- How will we know that our existing reports templates will need updating?