

View Patron History

In order to view a patron's history you must have settings in place to keep that history. There are three ways you can do this: individually, for each patron you wish to keep history, by policy, or all at once through Patron Preferences.

What history are we talking about anyway? In Circulation, bring up a patron, and from the actions menu you can select History, which will output a pdf of their history.

Charges and Payment records, as well as Refunds and Lexile History, will be kept no matter what, but Check Out History and Renewals will only be kept if you Keep Patron History.

Patron History is useful if you or your patron wish to know what items they've been checking out. Some libraries choose not to keep the history for privacy reasons or because of state laws prohibiting it.

All right, let's take a look at the preferences.

From **Tools**, open Preferences, Patrons, on the first tab the very first option you have is to Keep History for All Patrons.

To keep history, check this box, and Save.

This setting overrides the other options for keeping history and will keep history for *all* patrons. Unchecking this box does *not* mean no history will be kept, however, I will show you later how to disable patron history.

Alternatively, choose to keep history based on policy.

In your Policies preferences, in the Patron Other tab, there is a box to Keep Patron History. You can check or uncheck this for all your policies.

The last place is in each individual patron record, in Patron Management, under Statistics. Even if their policy is set to not keep history, you could check this box.

If boxes were already individually checked when you turned on the overall Keep Patron History preference, if you turn it off, those boxes will still be checked.

Let's uncheck the preference and Save.

To stop keeping history for all patrons, period, you can use a utility.

Open Utilities, Patrons, Disable Keep Patron History and make any necessary selections, such as selecting by policy.

Run, check that number, and click Yes.

Now, that utility will not clear the history, only uncheck that box. To clear history, use this other utility: Remove Patron History.

That covers it.