

View Patron History

Tip for: 03.23.15

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.



Unknown macro: 'multiexcerpt-include-macro'

[View Patron History \(v6\)](#)

To view patron history:

1. Bring up the patron in **Circulation**.
2. In the gear menu, choose **History** or **Patron History**.

Or:

1. Bring up the patron's record in **Patron Management**.
2. Go to the **Statistics** tab.
3. Click **Show 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.

To keep history for all patrons:

1. From **Tools**, open **Preferences**.
2. Go to the **Patrons** area, and the **Patron Rules** tab.
3. Check the box **Keep History for All Patrons**.
4. **Save** the preference.

This preference will keep history for all patrons, regardless of other settings. In order to allow keeping history by policy or by individual patron record, uncheck the box Keep History for All Patrons.

Note: If the policy or patron record preference was checked before you turned on Keep History for All Patrons, when you uncheck that option, those boxes will still be checked, and will need to be modified on an individual basis or with a utility.

To keep history by policy:

1. From **Tools**, open **Preferences**.
2. Go to the **Policies** area.
3. Change the **Patron Policy** drop-down menu to the patron type you want to keep history for.
4. On the **Patron** side, go to the **Other** tab.
5. Check the box **Keep Patron History**.
6. **Save** the preference.

To keep history for individual patrons:

1. Open **Patron Management**.
2. Locate the record for the patron you want to keep history on.
3. Go to the **Statistics** tab.
4. Unlock the record.
5. Check the box **Keep Patron History**.
6. **Save** the record.

To completely disable patron history:

- In **Preferences**, the **Patrons** area, the **Patron Rules** tab, uncheck the box to **Keep History for All Patrons**.
- From **Tools**, open **Utilities**.

In Alexandria version 7:

- In the **Patrons** category, select the **Disable Keep Patron History** utility.
- The utility will disable patron history everywhere; to disable certain policies, set the **Patrons with a Policy of** selection.
- **Run** the utility.
- In the **Modify Records** notice, check that the number shown matches your expectations, then click **Yes**.

In Alexandria version 6:

- In the **Circulation** category, select the **History - Keep Patron** utility.
- Change the selection to **Deactivate Patron Keep History**.
- The utility will disable patron history everywhere; to disable certain policies, set the **Select By** to **Policy**.
- **Run** the utility.

That utility will not clear the patron history, only uncheck those boxes. To clear history, use the **Remove Patron History** or **History - Clear Patron** utility.