

Charge History Function

The Charge History configuration enables patrons to allow the Symphony software to track their historical checkouts. You can view a recorded training covering this information here: <https://vimeo.com/album/2157082/video/219724397>

IMPORTANT NOTES

- This configuration defaults to OFF for all libraries and all library users.
- CHARGE HISTORY IS NOT ETERNAL. At this point we do not know how long a charge history record we will be keeping – 2 years is our initial estimate
- MSC Admins will monitor size of this file as libraries start using it to ensure it does not cause any performance issues
- If charge history setting is turned off by staff or patron in Enterprise – all saved data will be erased at end of day
- If item is deleted or discarded, charge history removed with it. WARN YOUR PATRONS that items removed for damage or weeded will disappear from their charge history.
- Purged charge history is NOT recoverable

How it Works

- Charge History is recorded upon CHECK IN. Record contains: Item ID, Title, Date Charged, Date Due, Date Discharged
- If patron has previously checked out the same title, charge history will inform you, but will NOT prevent the checkout

Using Charge History

STEP 1.

If your library would like to use the Charge History settings, contact MSC Admin by opening a [help desk ticket](#). Once setup is complete, you can turn on for individual patrons and patrons can control this through their account on Enterprise.

STEP 2.

Set Properties – right click on wizard in toolbar and choose Properties

Charge History tabs are available in the following wizards: Display User; Item Search and Display. The checkbox for the Charge History is on the Behavior tab.

Show Charge History Tab

Charge History will prevent removing users and deleting items unless you turn on the option to remove history along with them. The checkbox to turn this option is on the Behavior tab for Remove User and Call Number & Item Maintenance wizards.

Delete items with a charge history record

Prompt before removing charge history

Charge History helper is available in Checkout wizard. The checkbox is on the Helper tab and puts a button at the top of the wizard to display the patron's charge history.

Charge History

STEP 3.

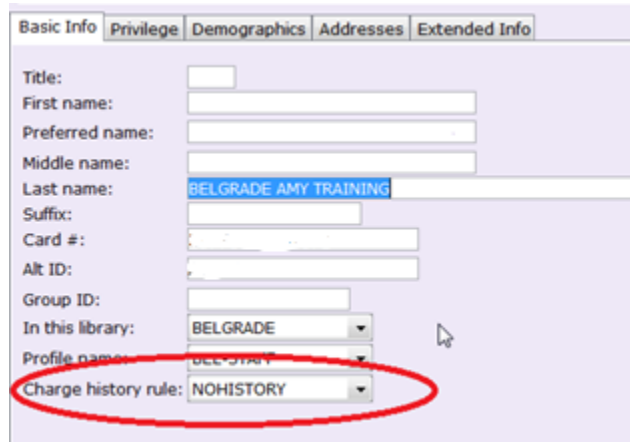
Turning charge history on or off for patrons is done in User Registration or Modify User Wizards > Basic Info Tab. Open the Patron record and adjust this field.

Charge History Rule field:

NOHISTORY – Charge history is OFF. Nothing is recorded

ALLCHARGES – Charge history is ON. Items checked in from patrons are recorded

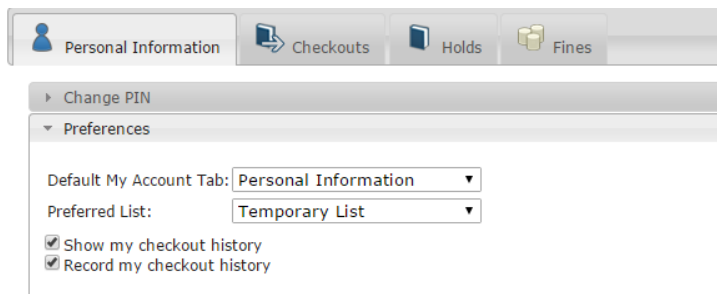
CIRCRULE – DO NOT USE. This is a setting not configured in our system.



The screenshot shows a web form with several tabs: 'Basic Info', 'Privilege', 'Demographics', 'Addresses', and 'Extended Info'. The 'Basic Info' tab is active. Fields include Title, First name, Preferred name, Middle name, Last name (populated with 'BELGRADE AMY TRAINING'), Suffix, Card #, Alt ID, Group ID, In this library (dropdown set to 'BELGRADE'), Profile name (dropdown set to 'BEL STATE'), and Charge history rule (dropdown set to 'NOHISTORY'). The 'Charge history rule' dropdown is circled in red.

Enterprise (Patron Options)

Patrons will be able to view their checkout history online and turn the recording of checkout history on or off. When they log in to Enterprise, in the MY ACCOUNT > Personal Information > Preferences section they will see the following:



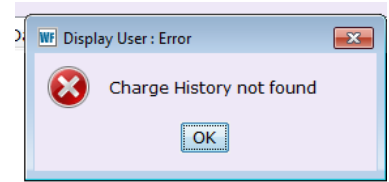
The screenshot shows a navigation bar with 'Personal Information', 'Checkouts', 'Holds', and 'Fines'. Below it, a 'Change PIN' link is visible. The 'Preferences' section is expanded, showing 'Default My Account Tab' set to 'Personal Information' and 'Preferred List' set to 'Temporary List'. Two checkboxes are checked: 'Show my checkout history' and 'Record my checkout history'.

- **Show my checkout history** will turn on an extra section on the Checkouts tab that lists their history
- **Record my checkout history** turns the history saving on. WARNING!! If a patron unchecks this box, all previously saved history will be deleted that evening.

Issues

Sharing Group libraries may see the following error in Display User.

This is the result of a patron who has history that cannot display because of property settings in the wizard.



To fix when pulling up an individual patron

- Click OK.
- Go to Charge History tab.
- At the bottom of the screen there is a display option for libraries. Change the setting to All Libraries. That will fix for this patron.

To prevent the error in the future.

- Display User wizard should be closed.
- Right Click on Display user and select Properties.
- On the behavior tab, change the dropdown under the Checkouts Tab section to All Libraries

