Borrowing history

Find information about viewing WorldShare Circulation borrowing history in My Account. Borrowing history allows users to see a list of materials that they have previously had on loan or used in the library via the in-house use workflow. Entries are added to the user's history as materials are returned to the library.

When enabled, the Borrowing history tab will appear in My Account and users will have the choice to enable retention of their history from the Profile tab.

Borrowing history is disabled by default for all users of your library. To protect your users' privacy, WMS will begin retaining and displaying a user's borrowing history only if:

- Your library enables the feature in OCLC Service Configuration.
- The user explicitly enables retention of their borrowing history in My Account.

Configuration

To enable this feature:

1. Navigate to the WMS Circulation module in OCLC Service Configuration and select Admin/General.
2. Select History.
3. In the Patron Borrowing History settings, set Store History to Yes.
4. Set a retention period between 1 and 60 months.
5. Click Save.

See Patron Borrowing History for more information.

Caution: All users' borrowing history data and opt-in preferences will be deleted if your library disables the feature. A warning message will appear if you attempt to save a change to the History configuration that would disable Patron Borrowing History. Retained history data may also be deleted if your library reduces your retention period.

Once your library has activated the feature and set a retention period, library users will see the Borrowing history tab and the option to enable borrowing history on the Profile tab in My Account.

Enable borrowing history within My Account

Each user controls the retention and display of their WorldShare Circulation borrowing history. By default, all users are opted out of borrowing history and will be shown an invitation to enable retention when viewing the Borrowing history tab for the first time.

To enable borrowing history for their account, library users must go to the Profile tab and toggle on the Enable my
borrowing history option. Your library's retention period will display in the explanatory text.

Disable borrowing history in My Account

Your users can disable borrowing history at any time via the Profile tab. The user will be warned that all of their retained history will be deleted.

After disabling and deleting history, the user will no longer see any of their historical data in the Borrowing history tab. Instead, the user will see the original invitation to enable history.

Caution: A user's borrowing history data and opt-in preference will be deleted if your library disables the feature for all users. Retained history data may also be deleted if your library reduces your retention period.

Note: A user may only access their own borrowing history. Access is limited to My Account. Borrowing history data is never shared with library staff or third parties.

Use Borrowing History

When borrowing history is enabled, bibliographic, item, and usage data are collected and added to the user's borrowing history as items are returned to the collection. The item's title, shelving location, call number, and enumeration will not change in the history even if the bibliographic data is changed or the item is withdrawn from the library's collection.

- Title links to WorldCat Discovery are provided so that your users can view current availability, export bibliographic citation information, or make a hold request. Temporary items and containers will not be hyperlinked.
- The Status column indicates if the item was returned by the user or if the user claimed the material was lost or was never on loan. The Date column indicates when the item was returned to the collection.
- By default, borrowing history will be sorted with the most recently returned item first. The user may alternatively choose to sort the list by Date or Title.

Borrowing history retention

Entries are automatically deleted from borrowing history if:

- The user disables borrowing history.
- The user's account is deleted.
- Your library disables the feature.
- Your library's retention period has elapsed or been shortened.

No history will appear in the Borrowing history tab until the user has returned at least one item to the library after enabling the feature.

Note: Patron Borrowing History is separate from Staff Transaction History feature. The data for each feature is stored and retained separately by WMS. Borrowing history is stored at the item/loan level while staff-facing transaction history is stored at the event level. You can choose to enable each feature separately or configure different retention periods.
• Your library may choose to restrict access to staff-facing Transaction History to trusted staff. See Circulation account roles for more information about the Circulation staff roles that do not have permission to view user account history data.

**Group circulation**

If your library participates in a WMS circulation group, your library will control if the borrowing history feature will be offered to your local users as well as the retention period for your local users. When enabled, your users' borrowing history will include all items used, regardless of which library owned the item, and where the item was checked out or returned. Your library will control if the borrowing history feature will be offered to your local users as well as the retention period for your local users.

**Tipasa integration**

When using Tipasa WMS integration, then request details and the Request again option will appear in the user's Borrowing history tab for temporary items created via the integration. To appear in Borrowing history, the item must have previously been checked out or used in the library via the in-house use workflow.

Otherwise, a user's Tipasa request history will continue to display under the Requests tab according to the Tipasa Patron Data Retention period configured.

OCLC recommends setting the same retention period for Tipasa and patron borrowing history.