Learn about patron history, which includes Transaction History and Notification History.

**History**

Includes Transaction History and Notification History, if you have chosen to store this information. These settings are optional and must be activated in OCLC Service Configuration (WorldShare Circulation > Admin/General > History). If you choose not to store this information, the History tab does not appear. For more information on storing history, see History.

For information on available reports, see Circulation reports.

Note: For information regarding which Circulation roles allow staff to see transaction and notification history, see Circulation roles.

**Transaction history**

The system retains circulation transactions (check ins, check outs, etc.) related to items and patrons when transaction history is stored. Transaction history is stored:

- In the Transaction History section of the Item Details screen (item transaction history)
- In the History tab of a patron account (patron transaction history)
- Columns include:
  - **Date**: Date and time of the transaction
  - **Transaction**: Type of transaction
  - **Transaction values**
    - Check Out
    - Check In
    - Renew
    - Change Due Date
    - Claimed Lost
    - Claimed Returned
    - Claimed Never Had
    - Found
  - **Title**: Title of item
  - **Barcode**: Barcode of the item
- **Recorded by:** Person performing the transaction
- **Source:** Application or service that originated the transaction event. See [Circulation Events](https://help.oclc.org/Library_Management/WorldShare_Circulation/Patron_management/Patron_history) for more information about the Event Transaction Source Report Object.

### Source values

<table>
<thead>
<tr>
<th>ACTION COMPLETED VIA</th>
<th>SOURCE</th>
<th>EVENT TRANSACTION SOURCE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>TRANSACTION HISTORY IN CIRCULATION</td>
<td>CIRCULATION EVENTS UNIVERSE IN REPORT DESIGNER</td>
</tr>
</tbody>
</table>

- WorldShare Circulation staff application
  - Staff
  - STAFF
- Offline Circulation client
  - Offline Circulation
  - OFFLINE
- SIP2
  - Self Service
  - SIP
- Library Policy
  - ex/ automated renewal
  - System
  - POLICY
- WorldCat Discovery My Account Patron Profile
  - Patron/External Application
  - PLATFORM_PATRON
- Staff Profile
  - External Application
  - NCIP_API_LEGACY
- WMS Circulation API
  - External Application
  - CIRC_API
- Acquisitions place hold
  - Acquisitions
  - ACQUISITIONS
- WorldShare ILL or Tipasa integration
  - Interlibrary Loan
  - ILL
- WorldCat Navigator integration
  - WorldCat Navigator
  - NAVIGATOR
**Watch a video**

Circulation: Transaction history (06:04)

Libraries can choose whether or not they wish to store circulation transaction history. This video reviews where to configure history settings, as well as where to view patron transaction history and item transaction history.

Media, iframe, embed and object tags are not supported inside of a PDF.

**Notification history**

The system retains notices sent to patrons when notification history is stored.

**Some columns need explanation:**

<table>
<thead>
<tr>
<th>TRANSACTION DATA</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Date and time the notification was sent.</td>
</tr>
<tr>
<td>Notification</td>
<td>The type of notification that was sent. To view all notification types, see Notification Policy.</td>
</tr>
<tr>
<td>Format</td>
<td>The type of notification that was created (Email or Print).</td>
</tr>
<tr>
<td>Barcode</td>
<td>Barcode of the item.</td>
</tr>
<tr>
<td>Status</td>
<td>Descriptions of all Statuses:</td>
</tr>
</tbody>
</table>

[https://help.oclc.org/Library_Management/WorldShare_Circulation/Patron_management/Patron_history](https://help.oclc.org/Library_Management/WorldShare_Circulation/Patron_management/Patron_history)

Printed: Sat, 13 Jun 2020 08:42:47 GMT
<table>
<thead>
<tr>
<th>STATUS</th>
<th>FORMAT</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authentication Error</td>
<td>Email, Print</td>
<td>An internal error. One of the services cannot be accessed due to authentication failure. The notice was not created.</td>
</tr>
<tr>
<td>Cannot Create Delivery</td>
<td>Email</td>
<td>The notice was created but could not be sent to the server that delivers email notices.</td>
</tr>
<tr>
<td>Cannot Create Formatter</td>
<td>Email, Print</td>
<td>A problem was encountered when attempting to format the notice. The notice was not created.</td>
</tr>
<tr>
<td>Connection Lost</td>
<td>Email, Print</td>
<td>Connection between WorldShare Circulation and the notification service was lost. The notice was not created. The notice was not created.</td>
</tr>
<tr>
<td>Empty Template</td>
<td>Email, Print</td>
<td>The notice could not be created because the corresponding notification template is empty.</td>
</tr>
<tr>
<td>Formatting Error</td>
<td>Email, Print</td>
<td>A problem was encountered when formatting the notice. The notice was not created.</td>
</tr>
<tr>
<td>Invalid Address</td>
<td>Email</td>
<td>The information in the email address field of the patron profile is not in a recognized format. The notice was created but was not sent to the server that delivers email notices.</td>
</tr>
<tr>
<td>No Address</td>
<td>Email</td>
<td>The notice was created but the patron profile does</td>
</tr>
<tr>
<td>STATUS</td>
<td>FORMAT</td>
<td>DEFINITION</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Not Sent</td>
<td>Email, Print</td>
<td>The notice was created but either was not sent to the server that delivers email notices or was not added to the file of notices for printing.</td>
</tr>
<tr>
<td>Problem Sending Notification</td>
<td>Email</td>
<td>The notice was created but could not be sent to the server that delivers email notices.</td>
</tr>
<tr>
<td>Scheduled for later Delivery</td>
<td>Email</td>
<td>The notice was created but has not yet been sent to the server that delivers email notices.</td>
</tr>
<tr>
<td>Successfully delivered</td>
<td>Email, Print</td>
<td>For email notices: the notice was successfully sent to the server that sends out email notices.</td>
</tr>
<tr>
<td>Unspecified Temporary Error</td>
<td>Email</td>
<td>Information is contained in the email address field of the patron profile but is not in a recognized format. The notice was created but was not sent to the server that delivers email notices.</td>
</tr>
<tr>
<td>Unknown Address</td>
<td>Email</td>
<td>An error occurred when trying to create the notice.</td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/WorldShare_Circulation/Patron_management/Patron_history
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### Watch a video

**Patron notification history (4:16)**

In this video we will review where to set patron notification history in Service Configuration, where to find those notifications in the patron record, and online help for possible returned statuses related to notifications.

### Configure columns

1. On the right side of the screen, click the **User Preferences button**.
2. In the Show Columns window, check or uncheck the columns you want to show or hide.
3. Close the Show Columns window by clicking anywhere outside it.