

Loan Audit Trail

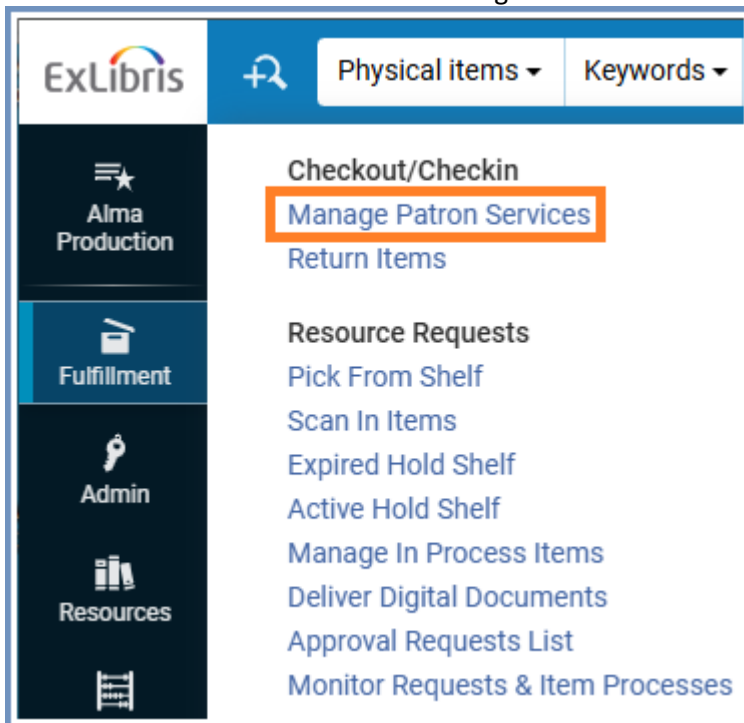
The Loan Audit Trail is where you can find all the actions a patron has had with an item charged out to them, such as loan date, renewals, and due date changes made by staff.

Basic Steps:

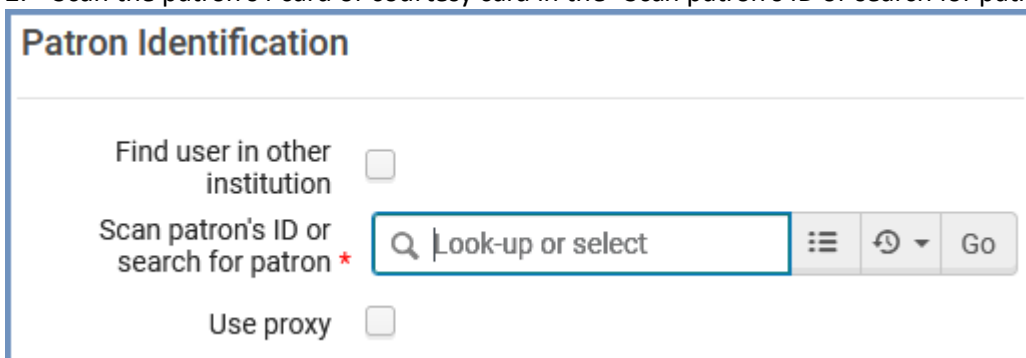
- Go to “Fulfillment” and select “Manage Patron Services”.
- Scan in the patron's card.
- Set “Filter by” to “All”.
- Click on the entry for the item in question.
- Click the “Loan History” button (or click the “...” button and select “Loan History” from the drop-down menu).

Detailed Workflow:

1. Go to “Fulfillment” and select “Manage Patron Services”.



2. Scan the patron's i-card or courtesy card in the “Scan patron's ID or search for patron” field.

A screenshot of the "Patron Identification" form. The form has a title "Patron Identification" at the top. Below the title, there are three input fields with checkboxes: "Find user in other institution" with an unchecked checkbox, "Scan patron's ID or search for patron" with a red asterisk and a search input field containing the text "Look-up or select", and "Use proxy" with an unchecked checkbox. The search input field has a magnifying glass icon on the left and a "Go" button on the right. There are also icons for a list and a refresh button next to the search field.

3. If it's not already set to view all loans, click "Filter by" and select "All".

The screenshot shows the 'My Institution - Loans' page. On the left is a user profile for 'Pooh, Winnie' with a 'Done' button and a menu icon. Below the profile are navigation buttons for 'Loans (5)', 'Returns (0)', 'Requests (0)', and 'Fines and Fees'. A summary box shows 'User group LOCAL HIPRV', 'Expiration date 12/31/2040', 'Active balance 0.00 USD', and 'Accrued fines 0.00 USD'. The main content area has a search bar 'Scan Item Barcode', a 'Filter by: This Session' dropdown, and a 'Clear All' button. A search dropdown menu is open, showing 'Search...', 'All', and 'This Session'. Below the menu, a message states 'No records were found.' with a list icon.

4. Click on the entry of the item you wish to see the Loan Audit Trail for. (You can click anywhere except for the checkbox or buttons.)

The screenshot shows the 'My Institution - Loans' page with a list of 5 items. The second item is highlighted with an orange border. The list includes item details such as title, author, barcode, loan date, due date, and status. The first item is 'Narrating the self : fictions of Japanese modernity / Tomi Suzuki' with a due date of 11/11/2024 and an 'Overdue' status. The second item is 'Ghost roast / Shawnelle Gibbs & Shawneé Gibbs, Emily Cannon ; interior colors by Aishwarya Tandon' with a due date of 12/16/2024 and a 'Renewed' status.

Item #	Title	Author	Barcode	Loan Date	Due Date	Status	Location	Call Number
1	Narrating the self : fictions of Japanese modernity	Tomi Suzuki	30112000157492	11/11/2024	11/11/2024 22:00:00 CST	Overdue	Owning library Main Stacks	PL747.57.A 85 S89 1996
2	Ghost roast	Shawnelle Gibbs & Shawneé Gibbs, Emily Cannon ; interior colors by Aishwarya Tandon	30112099149426	08/21/2024	12/16/2024 22:00:00 CST	Renewed	Owning library SSHEL	S.741.5973 G355gh

5. This will pull up a page with some information about the item and the loan. Click the “Loan History” button. (If the button’s not visible, click the “...” More Actions button and select “Loan History” from the menu.)

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... **Loan History** Work Order Renew ▲ ▼ ✕

Summary

Loan Information

Item Information

Notes



Ghost roast / Shawnelle Gibbs & Shawneé Gibbs, Emily Cannon ; interior colors by Aishwarya Tandon.
By Gibbs, Shawnelle,
New Versify/Harper Alley, imprints of 2024
York, NY : HarperCollins Publishers,
Barcode 30112099149426
🕒 Renewed

Loan Information ^


📅 Due date 12/16/2024 22:00:00 CST
Loan ID [REDACTED]
Loan date 08/21/2024
Loaned at desk SSHEL - SSHEL
Last renew date 12/02/2024
Last renew status Renewed Successfully
Maximum renew date 01/22/2025

Item Information ^

Owning library SSHEL
Location S Collection
Call number S.741.5973 G355gh
Barcode 30112099149426


6. At the bottom of the Loan Audit Trail screen is a list of actions for the item.

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Ghost roast / Shawnelle Gibbs & Shawneé Gibbs, Emily Cannon ; interior colors by Aishwarya Tandon.

Description -

Borrower Pooh, Winnie 

Loan date 08/21/2024 15:55:35 CDT

Due date 12/16/2024 22:00:00 CST

Loaned at library SSHEL

Loaned at desk SSHEL


Loan status Renewed

Process ID

Return date -

Hold loan? No

Booking loan? No

	Action Date	Action	Due Date	Loan Status	Desk	Operator	Additional Information
1	12/02/2024 11:25:17 CST	Renewed	12/16/2024 22:00:00 CST	Active	-	Discovery system	-
2	11/27/2024 10:58:13 CST	Renewed	12/11/2024 22:00:00 CST	Active	-	Discovery system	-
3	11/10/2024 15:28:28 CST	Renewed	11/25/2024 17:00:00 CST	Active	-	Discovery system	-
4	10/27/2024 16:11:09 CDT	Renewed	11/10/2024 22:00:00 CST	Active	-	Discovery system	-
5	10/13/2024 14:41:16 CDT	Renewed	10/27/2024 22:00:00 CDT	Active	-	Discovery system	-
6	10/01/2024 11:03:24 CDT	Renewed	10/15/2024 22:00:00 CDT	Active	-	Discovery system	-
7	09/15/2024 15:36:53 CDT	Renewed	09/29/2024 22:00:00 CDT	Active	-	Discovery system	-
8	09/03/2024 11:43:39 CDT	Renewed	09/17/2024 22:00:00 CDT	Active	-	Discovery system	-
9	08/21/2024 15:55:35 CDT	Loan	09/04/2024 22:00:00 CDT	Active	SSHEL	 	-