KOHA: Patrons Managements

- Add Patron Category
- Add Patron Attribute
- Add a new patron
- Add a Staff Patron
- Add a Statistical Patron
- Editing Patrons
- Patron Search
- Patron Permission
- Patron Information
KOHA: Patrons Managements

- Add Patron Category
  - Add Patron Attribute
  - Add a new patron
  - Add a Staff Patron
  - Add a Statistical Patron
  - Editing Patrons
  - Patron Search
  - Patron Permission
  - Patron Information
Patron categories allow you to organize your patrons into different roles, age groups, and patron types. To add a new patron category, click ‘New Category’ at the top of the page. Six main Patron Categories Types are: Adult, Child, Staff, Organizational, Professional, Statistical.
The ‘Category Code’ is an identifier for your new code. (The category code is limited to 10 characters (numbers and letters))

Enter a plain text version of the category in the ‘Description’ field

Enrollment period (in months) should be filled in if you have a limited enrollment period for your patrons (eg. Student cards expire after 9 months or until a specific date)

Some patron categories can have a minimum age (in years) requirement associated with them, enter this age in the ‘Age required’
KOHA: Patrons Managements

- Patron categories can also have a maximum age (in years) associated with them (such as children), enter this age in the 'Upperage limit'
- If you charge a membership fee for your patrons (such as those who live in another region) you can enter that in the 'Enrollment fee' field
- If you want your patron to receive overdue notices, set the 'Overdue notice required' to 'Yes'
- You can decide on a patron category basis if lost items are shown in the staff client by making a choice from the 'Lost items in staff client' pull down
KOHA: Patrons Managements

- If you charge patrons for placing holds on items, enter the fee amount in the ‘Hold fee’ field
- In the ‘Category type’ field choose one of the six main parent categories
- Finally you can assign advanced messaging preferences by default to a patron category
KOHA: Patrons Managements

- Add Patron Category

- **Add Patron Attribute**
  - Add a new patron
  - Add a Staff Patron
  - Add a Statistical Patron
  - Editing Patrons
  - Patron Search
  - Patron Permission
  - Patron Information
Patron attributes can be used to define custom fields to associate with your patron records. In order to enable the use of custom fields you need to set the *ExtendedPatronAttributes* system preference.

- More > Administration > Patrons & Circulation > Patron attribute types

A common use for this field would be for a student ID number or a Driver’s license number.
To add a new Patron Attribute Type, click the ‘New Patron Attribute Type’ button at the top of the page.
Each patron attribute has an edit and a delete link beside it on the list of attributes.

Some fields in the attribute will not be editable once created:
- Patron attribute type code
- Repeatable
- Unique identifier

You will be unable to delete an attribute if it’s in use.
KOHA: Patrons Managements

- Add Patron Category
- Add Patron Attribute
- Add a Staff Patron
- Add a Statistical Patron
- Editing Patrons
- Patron Search
- Patron Permission
- Patron Information
KOHA: Patrons Managements

- Patrons are added by going to the ‘Patrons’ module
  - Get there: Patrons

- Once there you can add a new patron
  - Click ’New’

- The fields that appear on the patron add form can be controlled by editing the BorrowerUnwantedField system preference
First enter the identifying information regarding your patron

- Required fields are defined in the BorrowerMandatoryField system
- Salutation is populated by the BorrowersTitles system preference
First enter the identifying information regarding your patron.

For contact information, note that the primary phone and email addresses are the ones that appear on notices and slips printed during circulation (receipts, transfer slips and hold slips).

The primary email is also the one that overdue notices and other messages go to.
KOHA: Patrons Managements

- If this patron is a child, you will be asked to attach the child patron to an adult patron.
- Click ‘Set to Patron’ to search your system for an existing patron.
- If the Guarantor is not in the system, you can enter the first and last name in the fields available.
- The relationships are set using the borrowerRelationship system preference.
If this patron is a professional, you will be asked to attach the patron to an organizational patron.

- Click ‘Set to Patron to search your system for an existing patron.
Each patron can have an alternate contact

- An alternate contact could be a parent or guardian. It can also be used in academic settings to store the patron’s home address.
The library management section includes values that are used within the library.

- The card number field is automatically calculated if you have the `autoMemberNum` system preference set that way.
- If you accidentally chose the wrong patron category at the beginning you can fix that here.
- Sort 1 and 2 are used for statistical purposes within your library.
Next, the Library Setup section includes additional library settings.
The registration date will automatically be filled in with today’s date.

If your patron cards expire (based on your patron category settings) the Expiry date will automatically be calculated.

The OPAC Note is a note for the patron - it will appear in the OPAC on the patron’s record.

The Circulation Note is meant solely for your library staff and will appear when the circulation staff goes to check an item out to the patron.

The Staff/OPAC asks for the username and password to be used by the patron (and/or staff member) to log into their account in the OPAC and for staff to log in to the staff client. (Staff will only be able to use this log in info to log in to the staff client if they have the necessary permissions.)
If you have set additional patron attributes up, these will appear next.

Finally, if you have EnhancedMessagingPreferences set to ‘allow,’ you can choose the messaging preferences for this patron.
These preference can be altered by the patron via the OPAC

These preferences will override any you set via the patron categories

Once finished, click ‘Save’
KOHA: Patrons Managements

- If the system suspects this patron is a duplicate of another it will warn you

![Duplicate suspected](image)

- If you have set a minimum or upper age limit on the patron category and are requiring that the birth date be filled in, Koha will warn you if the patron you’re adding is too old or young for the patron category you have selected:

![The following fields are wrong. Please fix them. Patron's age is incorrect for their category. Ages allowed are 5-17.](image)
KOHA: Patrons Managements

- Add Patron Category
- Add Patron Attribute
- Add a new patron
- **Add a Staff Patron**
  - Add a Statistical Patron
  - Editing Patrons
  - Patron Search
  - Patron Permission
  - Patron Information
KOHA: Patrons Managements

- All staff members must be entered into Koha as patrons of the ‘Staff’ type. Follow the steps in Add a Patron to add a staff member

- To give the staff member permissions to access the staff client, follow the steps in Patron Permissions

- Remember to assign your staff secure usernames and passwords since these will be used to log into the staff client
KOHA: Patrons Managements

- Add Patron Category
- Add Patron Attribute
- Add a new patron
- Add a Staff Patron
- Add a Statistical Patron
- Editing Patrons
- Patron Search
- Patron Permission
- Patron Information
KOHA: Patrons Managements

- Add Patron Category
- Add Patron Attribute
- Add a new patron
- Add a Staff Patron
- Add a Statistical Patron
- Editing Patrons
- Patron Search
- Patron Permission
- Patron Information
One way to track use of in house items is to "check out" the materials to a statistical patron.

The "check out" process doesn’t check the book out, but instead tracks an in house use of the item.

To use this method for tracking in house use you first will need a patron category set up for your Statistical patron.
Next, you will need to create a new patron of the statistical type.

Next, follow the steps put forth in the ‘Add a new Patron’ section of this manual. Since this patron is not a real person, simply fill in the required fields, the correct library and nothing else.

To learn about other methods of tracking in house use visit the Tracking inhouse use section of this manual.
KOHA: Patrons Managements

- Add Patron Category
- Add Patron Attribute
- Add a new patron
- Add a Staff Patron
- Add a Statistical Patron

Editing Patrons

- Patron Search
- Patron Permission
- Patron Information
Patrons in Koha can be edited using one of many edit buttons

To edit the entire patron record simply click the ‘Edit’ button at the top of the patron record
To edit the entire patron record simply click the ‘Edit’ button at the top of the patron record.
To edit a specific section of the patron record (for example the Library Use section) click the ’Edit’ link below the section.
KOHA: Patrons Managements

- A patron image can be added by browsing for the image on your machine from the 'Manage Patron Image' section

  - This form will not appear if you have the `patronimages` system preference to not allow patron Images
  - To add patron images in bulk, use the Upload Patron Images Tool
Patrons can also be blocked from checking items out by setting Patron Flags.

If you would like your circulation staff to confirm a patron’s address before checking items out to the patron, you can see the ‘Gone no Address’ flag.
If you would like to bar a patron from the library you can set the ’Restricted’ flag

(This flag can automatically be set with the Overdue/Notice Status Triggers)
If you enter in a date and/or note related to the restriction you will see that in the restricted message as well.

If the patron reports that they have lost their card you can set the ‘Lost Card’ flag to prevent someone else from using that card to check items out.

Cannot check out!

Lost: Patron's card is lost
KOHA: Patrons Management

- Add Patron Category
- Add Patron Attribute
- Add a new patron
- Add a Staff Patron
- Add a Statistical Patron
- Editing Patrons

**Patron Search**

- Patron Permission
- Patron Information
KOHA: Patrons Managements

- Clicking on the link to the Patron module will bring you to a search/browse screen for patrons
  - From here you can search for a patron

- Depending on what you have chosen for the 'Search fields' you can search for patrons in various different ways
Clicking on the link to the Patron module will bring you to a search/browse screen for patrons.

- If you want to filter your results to a specific branch or category, you can click the plus sign [+] to the right of the search box.

- You can also choose how your results will be sorted by using the 'Order by' pull down menu at the end of the form.
You can also browse through the patron records by clicking on the linked letters across the top.
KOHA: Patrons Managements

- Add Patron Category
- Add Patron Attribute
- Add a new patron
- Add a Staff Patron
- Add a Statistical Patron
- Editing Patrons
- Patron Search

- Patron Permission
  - Patron Information
Patron Permissions are used to allow staff members access to the staff client.

In order for a staff member to log into the staff interface they must have (at the very least) ‘catalogue’ permissions which allow them to view the staff interface.
To set patron permissions, you must first have a patron of the ‘Staff’ type open.

On the patron record click More and choose Set Permissions to alter patron permissions.
You will be presented with a list of preferences, some of which can be expanded by clicking the plus sign to the left of the section title.
KOHA: Patrons Managements

- Add Patron Category
- Add Patron Attribute
- Add a new patron
- Add a Staff Patron
- Add a Statistical Patron
- Editing Patrons
- Patron Search
- Patron Permission

**Patron Information**
When viewing a patron record you have the option to view information from one of many tabs found on the left hand side of the record

- Patrons > Browse or search for patron > Click patron name
KOHA: Patrons Managements

Details

- All patron information will appear on the Details tab. This includes all the contact information, notes, custom patron attributes, messaging preferences, etc entered when adding the patron.

- In the case of patrons who are marked as ‘Child’ or ‘Professional’ and their Guarantors additional information will appear on their record.
KOHA: Patrons Managements

- A child patron will list their Guarantor

- On the Guarantor’s record, all children and/or professionals will be listed
Below the patron’s information on the details screen is a tabbed display of the items they have checked out, overdue, and on hold.
In the case of patrons who are marked as ’Child’ or ’Professional’ and their Guarantors additional information will appear on their record.
The patron’s complete accounting history will appear on the Fines tab.

Contrary to its name, the Fines tab does not just show fine data, it also shows membership fees, rental fees, reserve fees and any other charge you may have for patrons.
If you set the EnableBorrowerFiles preference to ‘Do’ the Files tab will be visible on the patron information page.

From here you can upload files to attach to the patron record.
Files

- All files that are uploaded will appear above a form where additional files can be uploaded from.
Thanks