

KOHA

Patrons Managements

Presented by: CSIR-KNOWGATE

KNOWGATE Email:

csirknowgate@niscair.res.in

KNOWGATE Website:

knowgate.niscair.res.in

KOHA: Patrons Managements



Circulation **Patrons** Search Cart More ▾

• kohaadmin | NO LIBRARY SET ▾ • Help

Enter patron card number or partial name:

 [+ Search

Search patrons Check out Check in Search the catalog



Home › Patrons

New patron ▾

Browse by last name: ABCDEFGHIJKLMNOPQRSTUVWXYZ

KOHA: Patrons Managements

More > Administration > Patrons &

The screenshot shows the Koha Administration web interface. At the top, there is a navigation bar with links for Circulation, Patrons, Search, Cart, and More. The 'More' dropdown menu is open, listing various administrative functions: Lists, Cataloging, Acquisitions, Authorities, Serials, Reports, Tools, Administration (highlighted with a red circle), and About Koha. Below the navigation bar, there is a search area with the text 'Enter search keywords:' and a 'Submit' button. To the left of the search area is the CSIR-AMPRI logo. The main content area is titled 'Koha Administration' and contains several sections: 'Global system preferences' (with a search box), 'Basic parameters' (with sub-sections for Libraries and groups, Item types, and Authorized values), 'Patrons and circulation' (with sub-sections for Patron categories and Circulation and fines rules), 'Catalog' (with sub-sections for MARC bibliographic framework, Koha to MARC mapping, Keywords to MARC mapping, MARC Bibliographic framework test, and Authority types), and 'Classification sources'. The URL in the browser's address bar is 192.168.8.151:8080/cgi-bin/koha/admin/admin-home.pl.

Lists

Cataloging

Acquisitions

Authorities

Serials

Reports

Tools

Administration

About Koha

Global system preferences

Manage global system preferences like MARC flavor, date format, administrator email, and templates.

Basic parameters

Libraries and groups

Define libraries and groups.

Item types

Define item types used for circulation rules.

Authorized values

Define categories and authorized values for them.

Hint:

Configure these parameters in the order they appear.

Patrons and circulation

Patron categories

Define patron categories.

Circulation and fines rules

Define circulation and fines rules for combinations of

Catalog

MARC bibliographic framework

Create and manage Bibliographic frameworks that define the characteristics of your MARC Records (field and subfield definitions) as well as templates for the MARC editor.

Koha to MARC mapping

Define the mapping between the Koha transactional database (SQL) and the MARC Bibliographic records. Note that the mapping can be defined through MARC Bibliographic Framework. This tool is just a shortcut to speed up linkage.

Keywords to MARC mapping

Define the mapping between keywords and MARC fields, those keywords are used to find some datas independently of the framework.

MARC Bibliographic framework test


Checks the MARC structure. If you change your MARC Bibliographic framework it's recommended that you run this tool to test for errors in your definition.

Authority types

Create and manage Authorities frameworks that define the characteristics of your MARC Records (field and subfield definitions).

Classification sources

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- ▶ 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
- 
- A blue decorative triangle with a gradient and a fine grid pattern is located in the bottom-left corner of the slide.

KOHA: Patrons Managements

▶ Add Patron Category

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- ▶ Patron categories allow you to organize your patrons into different roles, age groups, and patron types
 - More > Administration > Patrons & Circulation > Patron Categories
 - 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

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New category

Category code:

Description:

Enrollment period: **Choose one**

In months: months

Until date:

Age required: years

Upperage limit: years

Enrollment fee:

Overdue notice required:

Lost items in staff client:

Hold fee:


Category type:

Default messaging preferences for this patron category


	Days in advance	SMS	Email	Digests only?	Do not notify
Advance notice	<input type="text" value="0"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item checkout	-	<input type="checkbox"/>	<input type="checkbox"/>	-	<input type="checkbox"/>
Hold filled	-	<input type="checkbox"/>	<input type="checkbox"/>	-	<input type="checkbox"/>
Item due	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item check-in	-	<input type="checkbox"/>	<input type="checkbox"/>	-	<input type="checkbox"/>

Save


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- ▶ 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
- 

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- ▶ 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
- 
- A decorative blue triangle with a gradient and fine lines, located in the bottom-left corner of the slide.

KOHA: Patrons Managements

- ▶ Add Patron Category
- ▶ **Add Patron Attribute**
- ▶ Add a new patron
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- ▶ Patron Information

KOHA: Patrons Managements

Patron Attributes Types

- ▶ 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

New Patron Attribute Type

Patron Attribute Types

Code	Description	Actions
STUID	Student ID	Edit Delete

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Adding Patron Attributes

- ▶ To add a new Patron Attribute Type, click the 'New Patron Attribute Type' button at the top of the page

Add patron attribute type

Patron attribute type code:

Description:

Repeatable: Check to let a patron record have multiple values of this attribute. This setting cannot be changed after an attribute is defined.

Unique identifier: If checked, attribute will be a unique identifier — if a value is given to a patron record, the same value cannot be given to a different record. This setting cannot be changed after an attribute is defined.

Allow password: Check to make it possible to associate a password with this attribute.

Display in OPAC: Check to display this attribute on a patron's details page in the OPAC.

Searchable: Check to make this attribute staff_searchable in the staff patron search.

Display in check-out: Check to show this attribute in patron check-out.

Authorized value category: : Authorized value category; if one is selected, the patron record input page will only allow values to be chosen from the authorized value list. However, an authorized value list is not enforced during batch patron import.

Category: : Choose one to limit this attribute to one patron type. Please leave blank if you want these attributes to be available for all types of patrons.

Class: : Group attributes types with a block title (based on Authorised values category 'PA_CLASS')

Save

Cancel

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Edit/Delete Patron Attributes

- ▶ 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

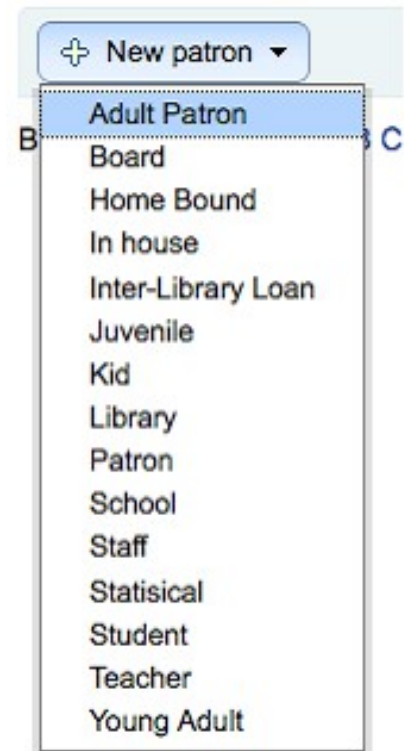
Could not delete patron attribute type "STUID" — It is in use by 3 patron records

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- ▶ 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 BorrowerUnwant-edField system preference



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- ▶ First enter the identifying information regarding your patron

Add Patron patron

Patron Identity

Salutation:

Surname: Required

First name: Required

Date of birth:

(MM/DD/YYYY)

Initials:

Other name:

Female Male N/A

- Required fields are defined in the *BorrowerMandatoryField* system
- Salutation is populated by the *BorrowersTitles* system preference

KOHA: Patrons Managements

- ▶ First enter the identifying information regarding your patron

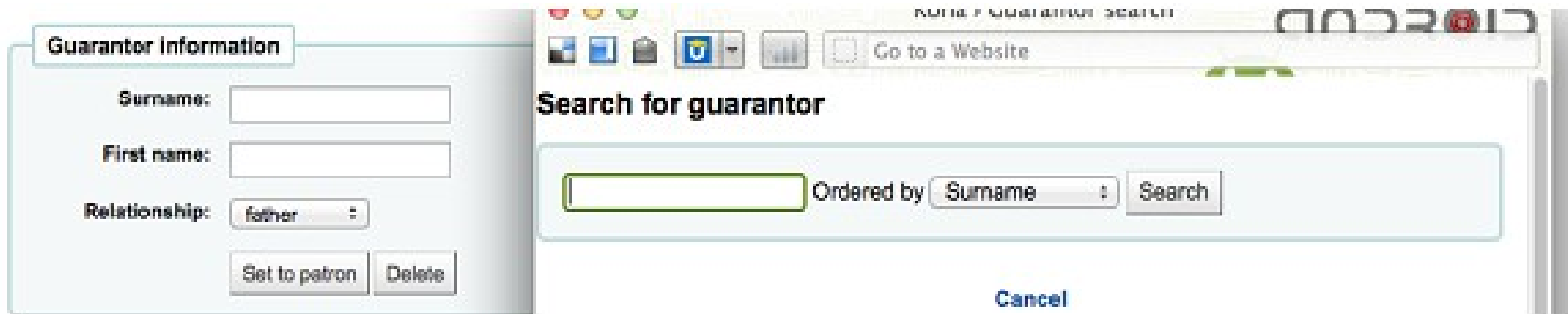
The screenshot displays two sections of a form for entering patron information:

- Main address:** This section contains input fields for "Address:", "Address 2:", "City:" (with an "or choose" dropdown menu), "State:", and "Zip/Postal code:".
- Contact:** This section contains input fields for "Primary phone:" (with a note "Shows on transit slips"), "Secondary phone:", "Other phone:", "Primary email:" (with a note "Shows on transit slips"), "Secondary email:", and "Fax:".

- 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



The screenshot displays two overlapping windows from the KOHA system. The background window is titled 'Guarantor information' and contains the following fields: 'Surname:' with an empty text box, 'First name:' with an empty text box, and 'Relationship:' with a dropdown menu currently set to 'father'. Below these fields are two buttons: 'Set to patron' and 'Delete'. The foreground window is a search dialog titled 'Search for guarantor'. It features a search input field, an 'Ordered by' dropdown menu set to 'Surname', and a 'Search' button. A 'Cancel' button is located below the search dialog.

- 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

KOHA: Patrons Managements

- ▶ If this patron is a professional, you will be asked to attach the patron to an organizational patron



The screenshot shows a web form titled "Guarantor information". It contains a text input field labeled "Organization name:". Below the input field are two buttons: "Set to patron" and "Delete".

- Click 'Set to Patron to search your system for an existing patron

KOHA: Patrons Managements

- ▶ 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

Alternate address

Address:

Address 2:

City:

State:

Zip/Postal code:

Country:

Phone:

Email:

Contact note:

Alternate contact

Surname:

First name:

Address:

Address 2:

City:

State:

Zip/Postal code:

Country:

Phone:

KOHA: Patrons Managements

- ▶ The library management section includes values that are used within the library



The screenshot shows a web form titled "Library management" with the following fields:


- Card number:** A text input field containing "2453500001954" with a red "Required" label to its right.
- Library:** A dropdown menu showing "South Branch" with a downward arrow.
- Category:** A dropdown menu showing "Patron" with a downward arrow.
- Sort 1:** An empty text input field.
- Sort 2:** An empty text input field.


- 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

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- ▶ Next, the Library Setup section includes additional library settings

Library set-up

Registration date: 
(MM/DD/YYYY)

Expiry date (leave blank for auto calc) 
(MM/DD/YYYY)

OPAC note:
This message appears on this patron's user page in the OPAC

Circulation note:
This message displays when checking out to this patron

OPAC/Staff login

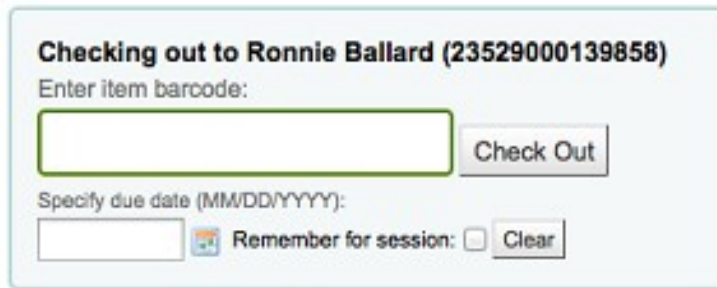
Username:

Password:
Minimum password length: 4

Confirm password:

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- 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 on the patron's record



Checking out to **Ronnie Ballard (23529000139858)**
Enter item barcode:

Specify due date (MM/DD/YYYY):
 Remember for session:

Attention:

ut to the

Notes:

Has permission to check out books for students.

Messages:

[Add a new message](#)

- 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)

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- ▶ If you have set *additional patron attributes* up, these will appear next

Additional attributes and identifiers

Type	Value	
DL (Drivers License)	<input type="text"/>	Clear
FAVCOLOR (Favourite Colour)	<input type="text" value=""/>	Clear New
PREVID (Previous system ID)	<input type="text"/>	Clear New

- ▶ Finally, if you have *EnhancedMessagingPreferences* set to 'allow,' you can choose the messaging preferences for this patron

Patron messaging preferences

	Days in advance	Email	Digests only?	Do not notify
Advance notice	<input type="text" value="0"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item checkout	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Hold filled	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Item due	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item check-in	-	<input type="checkbox"/>	-	<input type="checkbox"/>

Save Cancel

KOHA: Patrons Managements

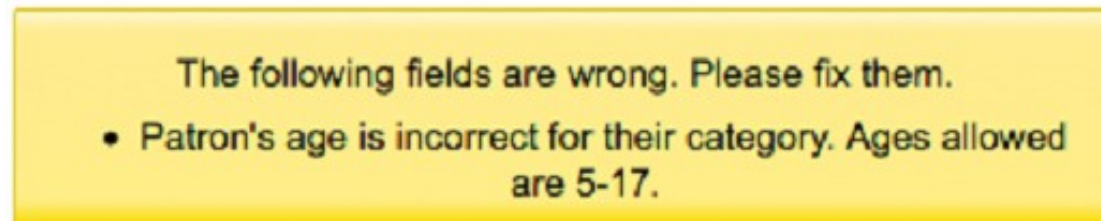
- These preference can be altered by the patron via the OPAC
- These preferences will override any you set via the patron categories
- ▶ Once finished, click 'Save'

KOHA: Patrons Managements

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




- ▶ 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:



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- ▶ Add Patron Category
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- ▶ 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
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KOHA: Patrons Managements

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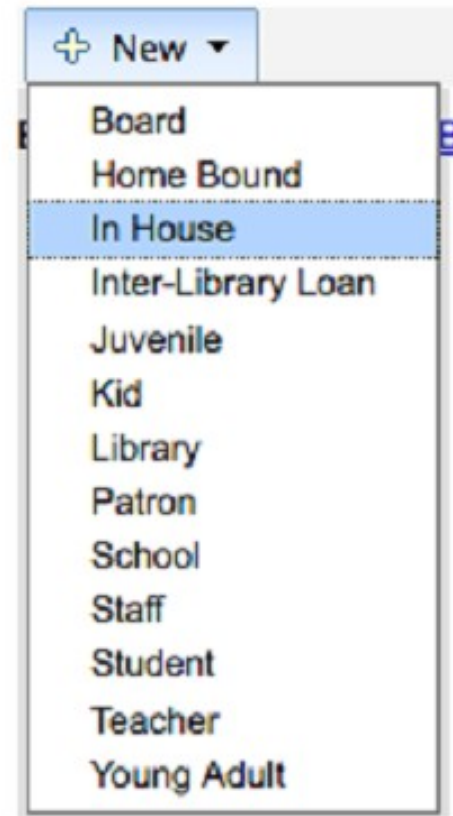
KOHA: Patrons Managements

- ▶ 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

INHS	In House	Statistical	999 months	0 years	0 years	0.00	No	0.00	none	Edit	Delete
------	--------------------------	-------------	------------	---------	---------	------	----	------	------	----------------------	------------------------

KOHA: Patrons Managements

- ▶ 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

KOHA: Patrons Managements

- ▶ 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



Nicole Engard (23529001223637)

KOHA: Patrons Managements

- ▶ To edit the entire patron record simply click the 'Edit' button at the top of the patron record

Change username and/or password for Ronnie Ballard

New username:

New password:
Koha cannot display existing passwords. Leave the field blank to leave password unchanged.
[Click to fill with a randomly generated suggestion. Passwords will be displayed as text.](#)

Minimum password length: 3

Confirm new password:

KOHA: Patrons Managements

- ▶ To edit a specific section of the patron record (for example the Library Use section) click the 'Edit' link below the section

Library use

Card number: 9876543456

Borrowernumber: 53

Category: Juvenile (J)

Registration date: 02/18/2011

Expiration date: 05/18/2019

Library: Fairfield

Privacy Pref: Never

Username: beau

Password: *****

[Edit](#)

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 th
- To add patron images in bulk, use the **l**

Upload Patron Image

Ronnie Ballard does not currently have an image available. To import an image for Ballard, enter the name of an image file to upload.
Only PNG, GIF, JPEG, XPM formats are supported.

Select the file to upload:

images

KOHA: Patrons Managements

- ▶ Patrons can also be blocked from checking items out by setting Patron Flags

◦ If you would like your patron, you can see the 'Gone no Address

patron, you can see

Patron account flags

Gone no address: Yes No

Lost card: Yes No

Restricted: Yes No Until: (optional)

Comment:

Additional attributes and identifiers

Type	
HBR (Home Branch)	<input type="checkbox"/>
RES (Resident)	<input type="checkbox"/>
SHOW_BCODE (Show Barcode in OPAC)	<input type="checkbox"/>

Calendar: Jun 2012

Mo	Tu	We	Th	Fr	Sa	Su
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1

Today Done

Cannot Check Out!

› **Address:** Patron's address in doubt

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- 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)

Cannot Check Out!

- › **Restricted:** Patron's account is restricted [Lift restriction](#)

KOHA: Patrons Managements

- 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 some **Cannot check out!**

› **Restricted:** Patron's account is restricted until 02/29/2012 with the comment "blocked due to trouble in the library"

Cannot Check Out!

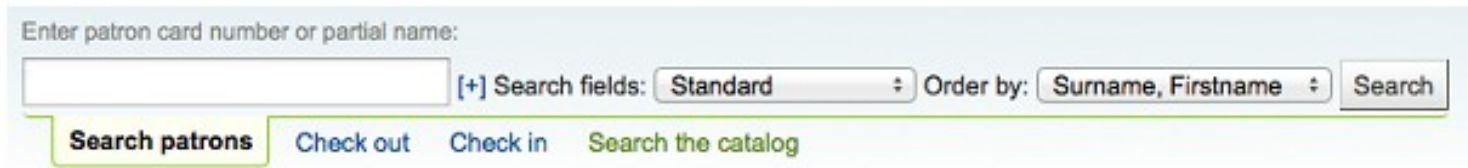
› **Lost:** Patron's card is lost

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- ▶ Add Patron Category
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- ▶ Add a Statistical Patron
- ▶ Editing Patrons
- ▶ **Patron Search**
- ▶ Patron Permission
- ▶ Patron Information

KOHA: Patrons Managements

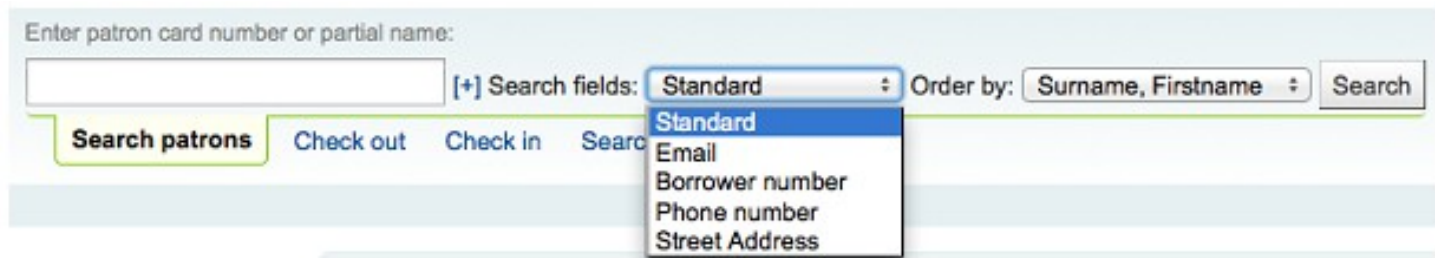
- ▶ Clicking on the link to the Patron module will bring you to a search/browse screen for patrons
 - From here you can search for a patron
 - Depending on what you have chosen for the 'Search fields' you can search for patrons in various different ways



Enter patron card number or partial name:

[+] Search fields: Standard Order by: Surname, Firstname Search

Search patrons Check out Check in Search the catalog



Enter patron card number or partial name:

[+] Search fields: Standard Order by: Surname, Firstname Search

Search patrons Check out Check in Search

- Standard
- Email
- Borrower number
- Phone number
- Street Address

KOHA: Patrons Managements

- ▶ 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

Enter patron card number or partial name:

[-] Search fields: Standard Order by: Surname, Firstname Search

Library: Any Category: Any

Search patrons Check out Check in Search the catalog

Enter patron card number or partial name:

[+] Search fields: Standard Order by: Surname, Firstname Search

Search patrons Check out Check in Search the catalog

Surname, Firstname
Cardnumber

KOHA: Patrons Managements

- You can also browse through the patron records by clicking on the linked letters across the top

Browse by last name: [A](#)[B](#)[C](#)[D](#)[E](#)[F](#)[G](#)[H](#)[I](#)[J](#)[K](#)[L](#)[M](#)[N](#)[O](#)[P](#)[Q](#)[R](#)[S](#)[T](#)[U](#)[V](#)[W](#)[X](#)[Y](#)[Z](#)

KOHA: Patrons Managements

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- ▶ **Patron Permission**
- ▶ Patron Information

KOHA: Patrons Managements

- ▶ 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

KOHA: Patrons Managements

Setting Patron Permissions

- ▶ 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



The screenshot displays the KOHA patron management interface for a patron named Nicole Engard. At the top, there is a horizontal toolbar with several action buttons: 'Edit', 'Change password', 'Duplicate', 'Print', 'Search to hold', and 'More'. The 'More' button is expanded, showing a dropdown menu with four options: 'Renew patron', 'Set permissions' (which is highlighted in blue), 'Delete', and 'Update child to adult patron'. Below the toolbar, the patron's name 'Nicole Engard (9876543457)' is displayed. Underneath the name, the address '123 My Street, Philadelphia, PA 19101' is shown. Further down, there are three phone numbers listed: 'Primary phone: 555.111.2345', 'Secondary phone: 878.111.1245', and 'Other phone: 707.111.2123'.

Edit **Change password** **Duplicate** **Print** **Search to hold** **More**

Nicole Engard (9876543457)

123 My Street
Philadelphia, PA 19101

Primary phone: 555.111.2345
Secondary phone: 878.111.1245
Other phone: 707.111.2123

Renew patron
Set permissions
Delete
Update child to adult patron

KOHA: Patrons Managements

Setting 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

Set Privileges for Engard, Nicole

- (*superlibrarian*) Access to all librarian functions
- (*circulate*) Circulate books
- (*catalogue*) View Catalog (Librarian Interface)
- (*parameters*) Set Koha system parameters
- (*borrowers*) Add or modify borrowers
- (*permissions*) Set user permissions
- (*reserveforothers*) Place and modify holds for patrons
- (*borrow*) Borrow books
- (*editcatalogue*) Edit Catalog (Modify bibliographic/holdings data)
 - (*edit_catalogue*) Edit catalog (Modify bibliographic/holdings data)
 - (*edit_items*) Edit Items
 - (*fast_cataloging*) Fast cataloging
- (*updatecharges*) Update borrower charges
- (*acquisition*) Acquisition and/or suggestion management
 - (*management*) Set library management parameters
- (*tools*) Use tools (export, import, barcodes)
- (*editauthorities*) Allow to edit authorities
- (*serials*) Allow to manage serials subscriptions
- (*reports*) Allow to access to the reports module
- (*staffaccess*) Modify login / permissions for staff users

Set Flags

[Cancel](#)

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

- ▶ 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

Beau Engard (123454)

123 My Street
Philadelphia, PA 19101

Home: 555.111.2345

Email (home): beau@gmail.com

Initials:

Date of birth:

Gender: Male

Guarantor: [Engard, Brian](#)

[Edit](#)

Brian Engard (12345678675432)

123 My Street
Philadelphia, PA 19101

Home: 555.111.2345

Email (home): brian@gmail.com

Initials:

Date of birth:

Gender: Male

Guarantees:

[Coda Engard](#)

[Beau Engard](#)



[Edit](#)

KOHA: Patrons Managements

Circulation Summary

- ▶ Below the patron's information on the details screen is a tabbed display of the items they have checked out, overdue, and on hold

2 Checkout(s) Relative issues Fines & Charges 0 Holds

Due date	Title	Item Type	Checked out on	Call no.	Charge	Price	Renew select all none	Check in select all none
04/09/2011	Harry Potter and the goblet of fire , by Rowling, J. K. ; Listening Library. 100020	 Book on CD	03/26/2011	SDB 62002	0.00	69.95	<input type="checkbox"/>	<input type="checkbox"/>
04/09/2011	Picture perfect! , by Picout, Jodi, ; Berkley Books. 100026	 Books	03/26/2011	PS3566.L372 P49 2002	0.00	15.00	<input type="checkbox"/>	<input type="checkbox"/>
Totals:					0.00	99.95	Renewal due date: <input type="text"/> Forgive fines on return: <input type="checkbox"/>	

Override Renewal Limit: Renew or Return checked items Renew all




KOHA: Patrons Managements

Circulation Summary

- ▶ In the case of patrons who are marked as 'Child' or 'Professional' and their Guarantors additional information will appear on their record

0 Checkout(s) [Relative issues](#) [Fines & Charges](#) [1 Hold\(s\)](#)

Relative issues

Due date	Title	Collection	Stock number	Barcode	Item Type	Checked out on	Borrower	Call no	Charge	Price
04/09/2011	Harry Potter and the goblet of fire , by Rowling, J. K. ; Listening Library.			100000	 Book on CD	03/26/2011	Nicole Schnauser	SDB 62002	0.00	69.95
04/09/2011	My sister's keeper , by Picoult, Jodi. ; Washington Square Press.			100002	 Book	03/26/2011	Reva Engard	PS3566 I372 M9 2005	0.00	14.00
04/09/2011	Picture perfect , by Picoult, Jodi. ; Berkley Books.			100008	 Book	03/26/2011	Nicole Schnauser	PS3566 I372 P49 2002	0.00	15.00

KOHA: Patrons Managements

Fines

- ▶ 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

Account	Pay fines	Create manual invoice	Create manual credit			
Date	Description of charges	Note	Amount	Outstanding		Print
09/11/2012	Payment,thanks View item The academic library and the net gen student :		-5.40	0.00	Reverse	Print
09/10/2012	The academic library and the net gen student : 07/10/2012 23:59 View item The academic library and the net gen student :		5.40	0.00		Print
09/10/2012	100 questions every home seller should ask : 07/16/2012 23:59 View item 100 questions every home seller should ask :		5.60	5.60		Print
09/10/2012	UContent : 04/10/2012 23:59 View item UContent :		12.40	12.40		Print
09/10/2012	Harry Potter and the sorcerer's stone / 05/14/2012 23:59 View item Harry Potter and the sorcerer's stone /		8.80	8.80		Print

KOHA: Patrons Managements

Files

- ▶ 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

Check out

Details

Fines

Routing Lists

Circulation history

Modification log

Notices

Statistics

Files

Files

This patron has no files attached.

Upload New File

Description:

File:

KOHA: Patrons Managements

Files

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

Files

Name	Type	Description	Uploaded	
wordpress-tblc-2012.pdf	application/pdf	Presentation	08/08/2012	Delete

Upload New File

Description:

File:

Thanks