KOHA
Patrons Managements

Presented by: CSIR-KNOWGATE

KNOWGATE Email:
csirknowgate@niscair.res.in
KNOWGATE Website:
knowgate.niscair.res.in

KOHA: Patrons Managements

KOHA: Patrons Managements

More > Administration > Patrons &

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

KOHA: Patrons Managements

▶ Patron categories allow you to organize your patrons into different roles, age groups, and patron types

  o More > Administration > Patrons & Circulation > Patron Categories

  o To add a new patron category click 'New Category' at the top of the page

  o Six main Patron **Categories Types** are:
  Adult, Child, Staff, Organizational, Professional, Statistical

KOHA: Patrons Managements

New category

Category code: [   ]

Description: [   ]

Enrollment period:

> **Choose one**
>
> In months: [   ] months
>
> Until date: [   ] 📅

Age required: [   ] years

Upperage limit: [   ] years

Enrollment fee: [0.00]

Overdue notice required: [No ▼]

Lost items in staff client: [Shown ▼]

Hold fee: [0.00]

Category type: [Select a category type ▼]

Default messaging preferences for this patron category

	Days in advance	SMS	Email	Digests only?	Do not notify
Advance notice	[0 ▼]	☐	☐	☐	☐
Item checkout	-	☐	☐	-	☐
Hold filled	-	☐	☐	-	☐
Item due	-	☐	☐	☐	☐
Item check-in	-	☐	☐	-	☐

[Save]

KOHA: Patrons Managements

- 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

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

KOHA: Patrons Managements

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

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

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 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
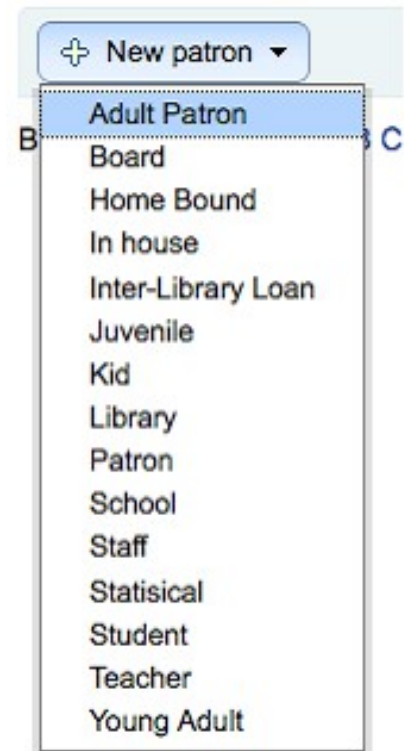
KOHA: Patrons Managements

▸ 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

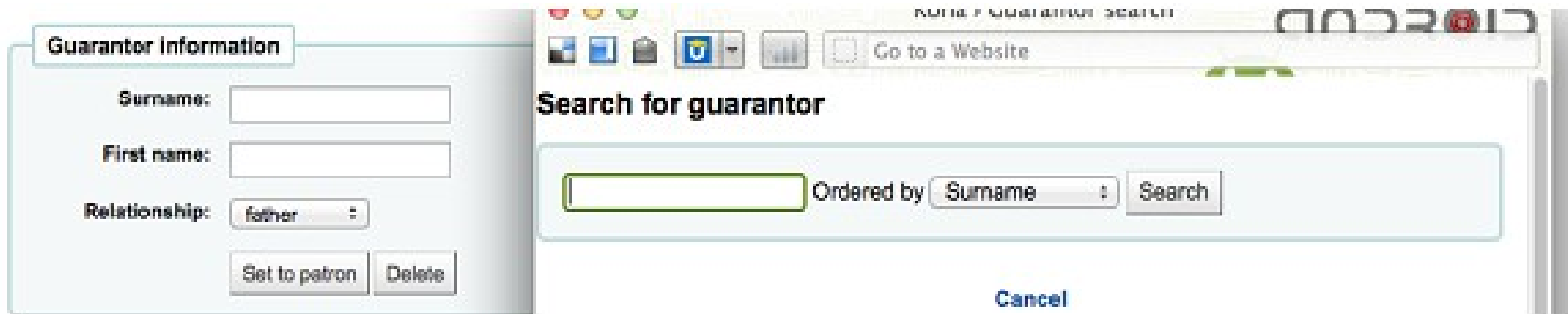o For contact information, note that the primary phone and email addresses are the ones that appear on notices and slips printed during circulation (receipts, transfer slips and hold slips)

o 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

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

o If the Guarantor is not in the system, you can enter the first and last name in the fields avail-able

o 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

Guarantor information

Organization
name: [   ]

[Set to patron] [Delete]

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

KOHA: Patrons Managements

▸ Each patron can have an alternate contact

o 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

Library management

Card number:	24535000001954 *Required*
Library:	South Branch ⇕
Category:	Patron ⇕
Sort 1:	
Sort 2:	

o The card number field is automatically calculated if you have the *autoMemberNum* system preference set that way.

o If you accidentally chose the wrong patron category at the beginning you can fix that here

o Sort 1 and 2 are used for statistical purposes within your library

KOHA: Patrons Managements

▸ Next, the Library Setup section includes additional library settings
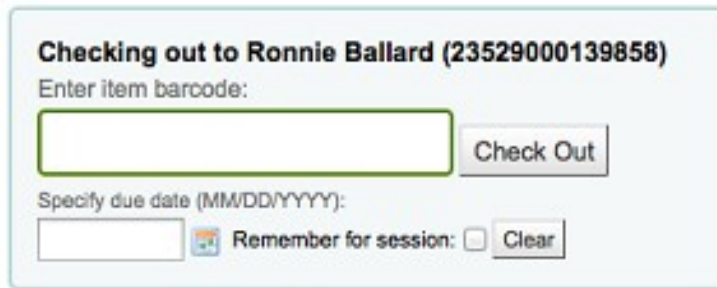
KOHA: Patrons Managements

o The registration date will automatically be filled in with today's date

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

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

o The Circulation Note is meant solely for your library staff and will appear   ut to the patron

Checking out to Ronnie Ballard (23529000139858)

Enter item barcode:

[   ] Check Out

Specify due date (MM/DD/YYYY):

[   ] Remember for session: ☐ Clear

Attention:

Notes:
Has permission to check out books for students.

Messages:
Add a new message

o 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)

KOHA: Patrons Managements

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

Additional attributes and identifiers

Type	Value	
DL (Drivers License)		Clear
FAVCOLOR (Favourite Colour)		Clear New
PREVID (Previous system ID)		Clear New

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

Patron messaging preferences

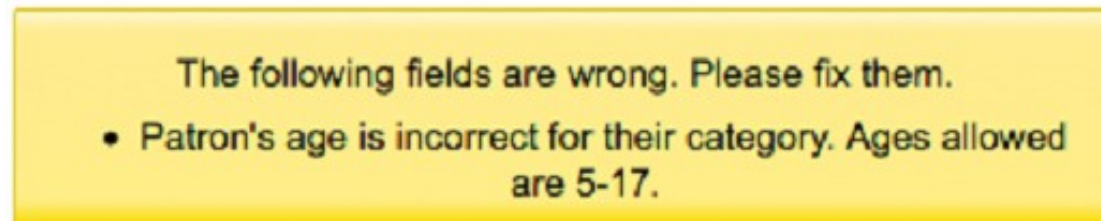|	Days in advance	Email	Digests only?	Do not notify
Advance notice	0	☐	☐	☐
Item checkout	-	☐	-	☐
Hold filled	-	☐	-	☐
Item due	-	☑	☐	☐
Item check-in	-	☐	-	☐

Save   Cancel

- 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
Detail Duplicate ? Yes   No, it is not ☐

- 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.

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

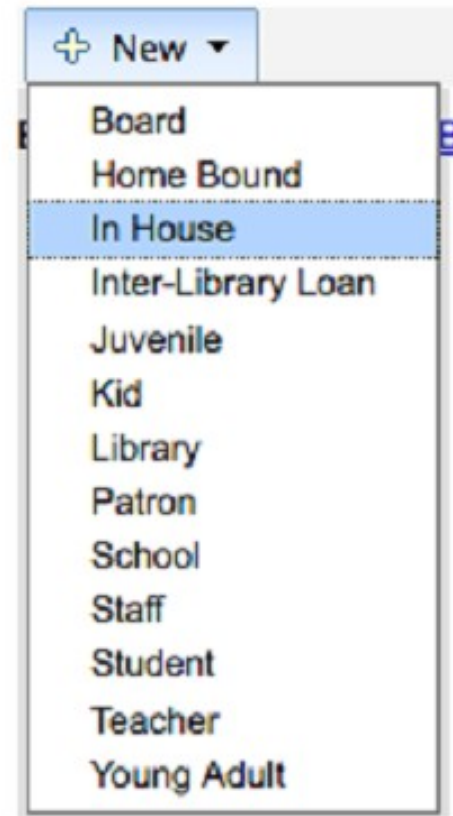- Patron Search

- Patron Permission

- Patron Information

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

⊹ New ▾

Board
Home Bound
In House
Inter-Library Loan
Juvenile
Kid
Library
Patron
School
Staff
Student
Teacher
Young Adult

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:

23529000139858

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:

Save   Cancel

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 mages
- To add patron images in bulk, use the *U

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:

[   ] [Browse...]

[Upload]

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' _____

Cannot Check Out!

› Address: Patron's address in doubt

KOHA: Patrons Managements

○ 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 som

Cannot check out!

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

Cannot Check Out!
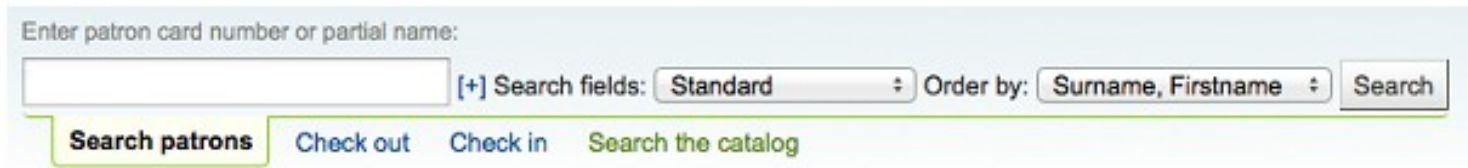
> **Lost:** Patron's card is lost

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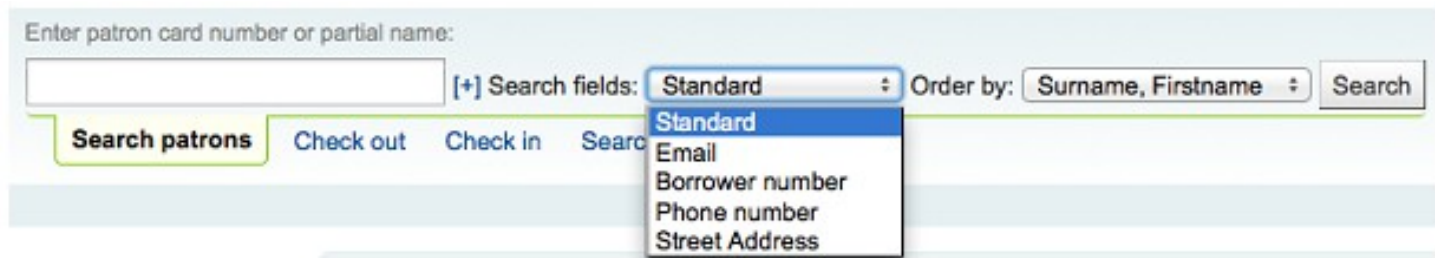
‣ Clicking on the link to the Patron module will bring you to a search/browse screen for patrons
  o From here you can search for a patron

  o 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   Searc

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

  o 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

  o You can also choose how your results will be sorted by using the 'Order by' pull down menu at the end of the form

KOHA: Patrons Managements

o 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

- 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

▸ 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

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

  o 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

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

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

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: Browse...

Upload File

▸ 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: [   ] Browse...

Upload File

Thanks