User Management

1. **Access Koha Staff Interface**: Log in with your staff credentials.
2. **Navigate to Patron Management**: Look for the section labeled "Patrons" or "Patron Management."
3. **Add New Patron/User**: Click on "Add Patron" or similar. Fill in required information like name, address, contact details. Assign a username and password if needed. Set preferences.
4. **Edit Existing Patrons/Users**: Use the search feature to find a patron. Click their name to view details. Make necessary changes.
5. **Delete Patrons/Users**: Locate the delete option, select patrons, and confirm deletion.
6. **Manage Borrowing Privileges**: Adjust loan periods, borrowing limits, and restrictions based on library policies.
7. **View Patron/User Activity**: Track borrowing history, fines, holds, and other activities.
8. **Save Changes**: Ensure to save any modifications made to patron records.
9. **Communicate with Patrons**: Utilize features for sending notifications or emails regarding overdue notices, hold pickups, or announcements.

- Add New Patron/User
- Edit Patron/User
- Import Patron/User
- Patron /User List
- Patron Batch Modification
- Patron Card Creator

Add New Patron/User

1. **Navigate to Patron Management**: Look for the section labeled "Patrons" or "Patron Management." This is typically located in the main menu or sidebar.
2. **Add Patron/User**: Click on the option to add a new patron or user. This may be labeled as "Add Patron," "New Patron," or similar.
3. **Fill in Patron Information**: Complete the patron registration form with the required information. This may include:
   - Name: First name, last name, and any additional name fields.
   - Contact Information: Address, phone number, email address.
   - Additional Details: Date of birth, patron category, any custom fields as required by your library.
   - Username and Password: If your system requires patrons to have login credentials, set up a username and password for the new patron.
4. **Set Borrowing Privileges**: Define borrowing privileges for the new patron. This includes setting loan periods, borrowing limits, and any restrictions based on patron category or library policies.
5. **Save Patron Record**: Once you've filled in the necessary information and configured borrowing privileges, save the new patron record. This may be done by clicking a "Save" or "Submit" button at the bottom of the form.
6. **Confirmation**: After saving the patron record, you may receive a confirmation message indicating that the new patron has been successfully added to the system.
7. **Review and Verify**: Double-check the patron's information to ensure accuracy and completeness. Make any necessary adjustments if needed.

Edit Patron/User

1. **Navigate to Patron Management**: Look for the section labeled "Patrons" or "Patron Management" in the main menu or sidebar.
2. **Search for the Patron**: Use the search feature to find the patron whose information you want to edit. You can search by name, barcode, or any other identifying information.
3. **View Patron Details**: Once you've located the patron, click on their name to view their details.
4. **Edit Patron Information**: Make the necessary changes to the patron's information. This may include:
   - Contact Information: Address, phone number, email address.
   - Additional Details: Date of birth, patron category, custom fields, etc.
   - Borrowing Privileges: Loan periods, borrowing limits, restrictions, etc.
5. **Save Changes**: After making the desired edits, save the changes to the patron's record. This may involve clicking a "Save" or "Update" button at the bottom of the page.
6. **Confirmation**: After saving the changes, you may receive a confirmation message indicating that the patron's information has been successfully updated.
7. **Review**: Double-check the updated information to ensure accuracy.
8. **Communicate Changes (if necessary)**: If significant changes were made to the patron's information, consider communicating these changes to the patron.

Import Patron/User

1. **Prepare the CSV File**: Make sure your CSV file contains the necessary information for the patrons you want to import. This typically includes fields such as name, address, email, and any other relevant information. Ensure that the CSV file is formatted correctly with each field separated by commas or semicolons. Notes:
   The first line in the file must be a header row defining which columns you are supplying in the import file.
   Download a Starter CSV file with all the columns. Values are comma-separated.
   OR choose which fields you want to supply from the following list:
   'address', 'address2', 'altcontactaddress1', 'altcontactaddress2', 'altcontactaddress3', 'altcontactcountry', 'altcontactfirstname', 'altcontactphone', 'altcontactstate', 'altcontactsurname', 'altcontactzipcode', 'anonymized', 'auth_method', 'autorenew_checkouts', 'B_address', 'B_address2', 'B_city', 'B_country', 'B_email', 'B_phone', 'B_state', 'B_streetnumber', 'B_streettype', 'B_zipcode', 'borrowernotes', 'borrowernumber', 'branchcode', 'cardnumber', 'categorycode', 'checkprevcheckout', 'city', 'contactfirstname', 'contactname', 'contactnote', 'contacttitle', 'country', 'date_renewed', 'dateenrolled', 'dateexpiry', 'dateofbirth', 'debarred', 'debarredcomment', 'email', 'emailpro', 'fax', 'firstname', 'flags', 'gonenoaddress', 'initials', 'lang', 'lastseen', 'login_attempts', 'lost', 'middle_name', 'mobile', 'opacnote', 'othernames', 'overdrive_auth_token', 'password', 'password_expiration_date', 'phone', 'phonepro', 'primary_contact_method', 'privacy', 'privacy_guarantor_checkouts', 'privacy_guarantor_fines', 'pronouns', 'protected', 'relationship', 'secret', 'sex', 'sms_provider_id', 'smsalertnumber', 'sort1', 'sort2', 'state', 'streetnumber', 'streettype', 'surname', 'title', 'updated_on', 'userid', 'zipcode',
   If loading patron attributes, the 'patron_attributes' field should contain a comma-separated list of attribute types and values. The attribute type code and a colon should precede each value. For example: INSTID:12345,LANG:fr or STARTDATE:January 1 2010,TRACK:Day. If an input record has more than one attribute, the fields should either be entered as an unquoted string (previous examples), or with each field wrapped in separate double quotes and delimited by a comma: "STARTDATE:January 1, 2010","TRACK:Day". The second syntax would be required if the data might have a comma in it, like a date string.
   Required fields: The fields 'surname', 'branchcode', and 'categorycode' are required and 'branchcode' and 'categorycode' must match valid entries in your database.
   'password' should be stored in plaintext, and will be converted to a Bcrypt hash (if your passwords are already encrypted, talk to your system administrator about options).
   Passwords will not be updated on overwrite unless replace passwords option is checked.
   Date formats should match your system preference, and must be zero-padded, e.g. '01/02/2008'. Alternatively, you can supply dates in ISO format (e.g., '2010-10-28').
2. **Navigate to Tools**: Look for the "Tools" section in the main menu or sidebar of the Koha Staff Interface.

3. **Select "Import Patrons"**: Within the Tools section, locate the option for "Patron Import/Export" and click on it.
4. **Choose Import Option**: Select the "Import Patrons" option from the Patron Import/Export screen.
5. **Upload CSV File**: Click on the "Choose File" or similar button to select the CSV file containing the patron data from your computer. Once selected, upload the file.
6. **Map Fields**: Koha will prompt you to map the fields from your CSV file to the corresponding fields in Koha. This step ensures that the data is imported correctly. Match each field from your CSV file to the corresponding field in Koha (e.g., Name -> First Name, Address -> Street Address, etc.).
7. **Validate and Import**: Once you've mapped all the fields, Koha will validate the data to ensure it meets the required format. Review any validation errors or warnings and make corrections as necessary. Once validation is successful, proceed with the import process.
8. **Review Import Summary**: After importing, review the import summary to verify the number of patrons imported and any relevant information.
9. **Confirm**: Confirm that the import was successful and review the imported patron records to ensure accuracy.
10. **Communicate**: If necessary, communicate with patrons to inform them of any changes or updates resulting from the import process.

Patron /User List

To create a patron list in Koha, you can follow these steps:

1. **Navigate to Patron Management**: Look for the section labeled "Patrons" or "Patron Management" in the main menu or sidebar.
2. **Search for Patrons**: Use the search feature to find the patrons you want to include in the list. You can search by various criteria such as name, barcode, patron category, etc.
3. **Select Patrons**: Once you've located the patrons you want to include in the list, select them by checking the checkboxes next to their names.
4. **Create List**: After selecting the desired patrons, look for an option to create a new list or add them to an existing list. This option may be labeled as "Create List," "Add to List," or similar.
5. **Name the List**: Give your list a descriptive name that reflects its contents or purpose. This will help you easily identify the list in the future.
6. **Save the List**: Save the newly created list. The selected patrons will now be grouped together in the list.
7. **View and Manage Lists**: You can view and manage your patron lists under the "Patrons" or "Patron Management" section. Look for an option to view lists or manage existing lists.
8. **Edit or Update Lists**: If needed, you can edit or update your patron lists by adding or removing patrons, renaming the list, or making other modifications.
9. **Utilize Lists**: Once your patron lists are created, you can utilize them for various purposes such as sending targeted communications, managing circulation policies, generating reports, and more.

Patron Batch Modification

1. **Navigate to Tools**: Look for the "Tools" section in the main menu or sidebar of the Koha Staff Interface.
2. **Select "Batch Patron Modification"**: Within the Tools section, locate the option for "Batch Patron Modification" and click on it.
3. **Choose Modification Type**: Select the type of modification you want to perform from the available options. This may include modifying patron categories, expiration dates, messaging preferences, and more.
4. **Filter Patrons**: Use the available filters to narrow down the list of patrons you want to modify. You can filter patrons based on criteria such as patron category, status, expiration date, etc.
5. **Select Patrons**: Once you've filtered the list, select the patrons you want to apply the modification to. You can typically do this by checking checkboxes next to each patron's name.
6. **Apply Modification**: After selecting the desired patrons, specify the modification you want to apply. Depending on the modification type chosen, you may need to input additional information such as the new patron category, expiration date, etc.
7. **Review Changes**: Before applying the modification, review the changes to ensure they are accurate and as intended.
8. **Confirm and Apply**: Once you're satisfied with the modifications, confirm your selection and apply the changes. This may involve clicking a "Save" or "Apply" button.
9. **Review Results**: After the modifications have been applied, review the results to verify that the changes were made successfully.

Patron Card Creator

To create patron cards in Koha, you can follow these steps:

1. **Navigate to Tools:** Go to tools and select patron card creator.
2. **Create Card Layout**: Create layout first.
3. **Choose Card Template**: Select a card template or layout for the patron card.
4. **Review Card Information**: Ensure that all necessary information, such as the patron's name, barcode, library card number, and any other relevant details, is included on the card.
5. **Preview and Print**: Preview the patron card to verify its appearance and content. Once satisfied, proceed to print the card using a card printer or standard printer.
6. **Customize Card Layout (Optional)**: If Koha's default card templates don't meet your needs, you can create custom card layouts using external software (e.g., Microsoft Word, Adobe Photoshop) and import the patron information into the template.
7. **Communicate Card Issuance**: Inform the patron about the issuance of their library card and any relevant instructions for its use.
8. **Distribute Patron Cards**: Distribute the printed patron cards to the respective patrons.