

# 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.
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