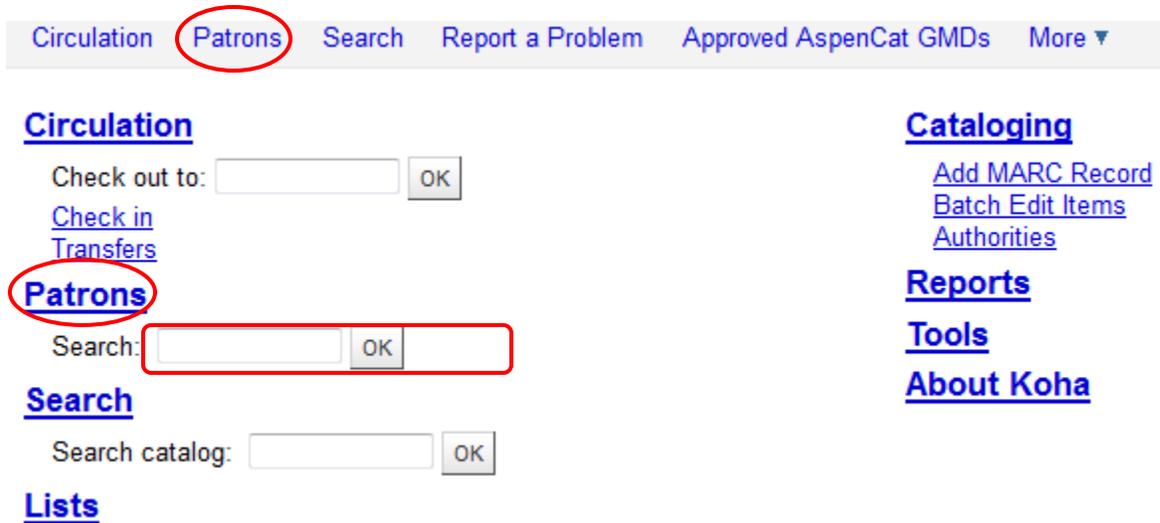


# AspenCat – Adding a Patron

Patron records in Koha are specific to each library. You will only be able to add, edit and delete patrons associated with your library.

1. Login to the staff modules.
2. Before adding a patron record, you should search the patron list to make sure a record does not already exist. You can search for a patron directly from the staff menu using part of the patron name or the patron barcode. You can also go straight into the Patron module by clicking on the link at the top of the page or on the main staff menu.



The screenshot shows the Koha staff menu with the following items:

- [Circulation](#)
- [Patrons](#) (highlighted with a red circle)
- [Search](#)
- [Report a Problem](#)
- [Approved AspenCat GMDs](#)
- [More ▾](#)

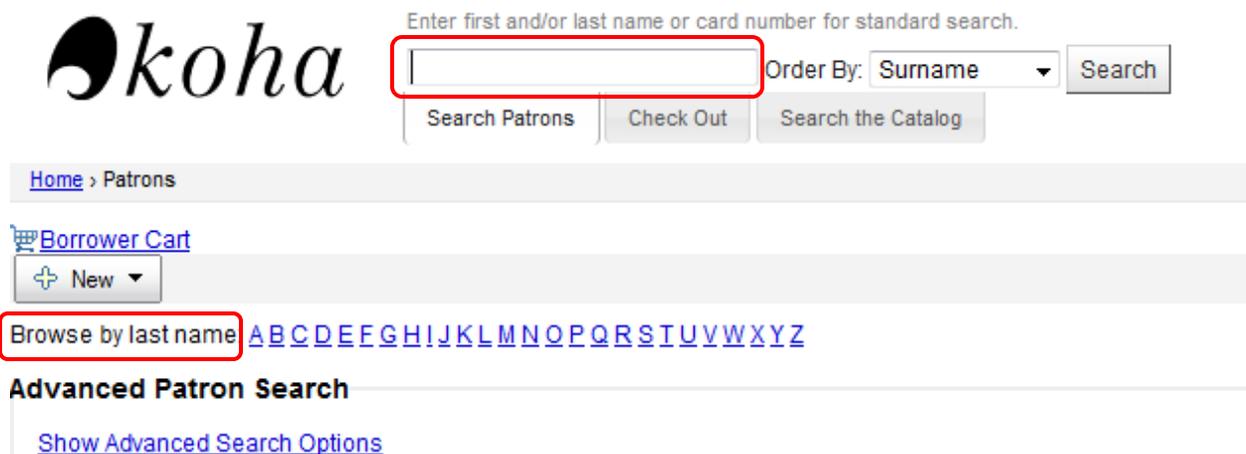
Below the menu, there are several sections:

- Circulation**
  - Check out to:
  - [Check in](#)
  - [Transfers](#)
- Patrons** (highlighted with a red circle)
  - Search:
- Search**
  - Search catalog:
- Lists**

On the right side, there are additional links:

- Cataloging**
  - [Add MARC Record](#)
  - [Batch Edit Items](#)
  - [Authorities](#)
- Reports**
- Tools**
- About Koha**

3. The Patron module offers the “Search Patrons” field at the top of the page where you can enter the patron barcode number or partial name. You can also browse through patrons by last name.



The screenshot shows the Koha Patron search interface with the following elements:

- koha** logo
- Search input field:  (highlighted with a red box)
- Placeholder text: Enter first and/or last name or card number for standard search.
- Order By: Surname ▾
- Search button
- Buttons: Search Patrons, Check Out, Search the Catalog
- Home > Patrons breadcrumb
- Borrower Cart icon
- + New ▾ button
- 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](#) (highlighted with a red box)
- Advanced Patron Search**
- [Show Advanced Search Options](#)

- Search results show up below the alphabetic browse.

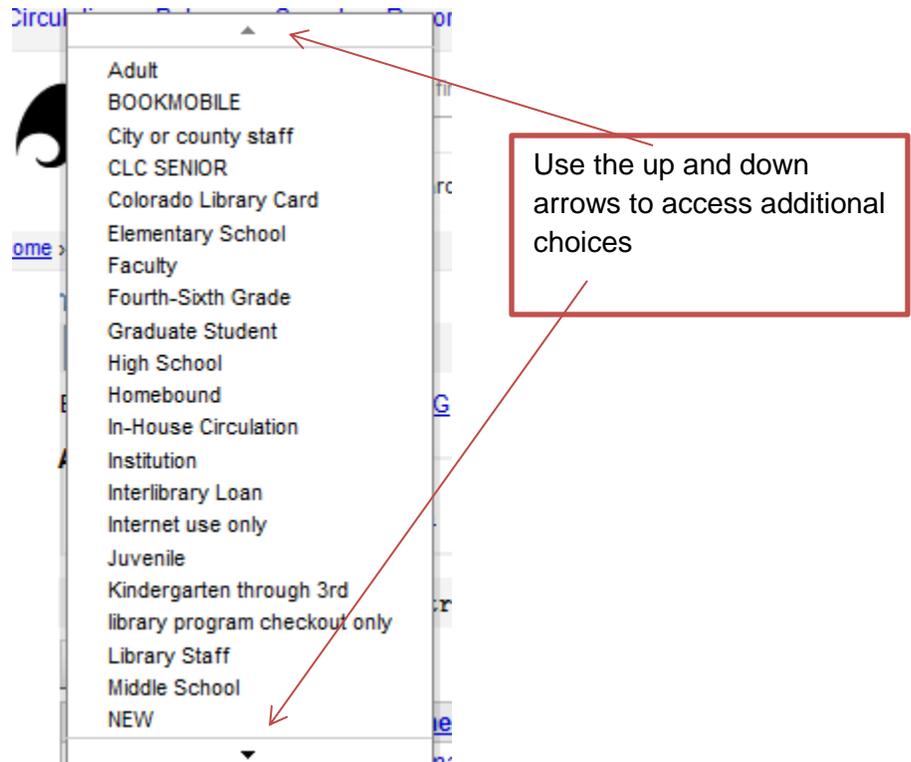
The screenshot shows the Koha search results page. At the top, there is a search bar with the Koha logo and the text "Enter first and/or last name or card number for standard search." Below the search bar are buttons for "Search Patrons", "Check Out", and "Search the Catalog". A dropdown menu shows "Order By: Surname" and a "Search" button. Below the search bar, there is a breadcrumb trail: "Home > Patrons > Search Results". A "Borrower Cart" section contains a "New" button. Below that, there is an alphabetic browse bar with letters A-Z. An "Advanced Patron Search" section contains a "Show Advanced Search Options" link. The main content area is titled "Results 1 to 2 of 2 found for 'patron'". Below this title is a button "Add Selected Borrowers To Cart". A table lists the search results:

<input type="checkbox"/>	Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note		
<input type="checkbox"/>	00000001234563	<a href="#">Patron.Amanda</a> 81507	Elementary School (C)	CLIC	06/10/2014	0/0	0.00		<a href="#">Add to Cart</a>	<a href="#">Edit</a>
<input type="checkbox"/>	31245678901234	<a href="#">Patron.Example</a> 81507	Adult (A)	CLIC	05/10/2016	0/0	0.00	test	<a href="#">Add to Cart</a>	<a href="#">Edit</a>

- If you do not find a patron matching your search, click on the "New" button to add a new patron record.

This screenshot is identical to the one above, but the "New" button in the "Borrower Cart" section is highlighted with a red box. The search results table is empty, indicating that no patrons were found for the search term.

6. A list will be displayed of the different types of patrons which can be added. Select the one you wish to use.



7. For this example, we are using the “Adult” patron type. Once you select the patron type, a new record will be displayed for you to fill out. Required fields are highlighted with red text. Once you have filled in all of the information, click the “Save” button to finalize the patron record.

## Add Adult patron

**Patron identity**

Salutation: Ms

**Surname:** Example *Required*

First name: Sally

Middle Initial(s):

Date of birth: 01/02/1976

Other name:

Female  Male  N/A

Fields in RED are required. Complete as much information as you can for each new patron

**Main address**

Address: 123 Colorado Aven

Address 2:

City, State: Centennial , CO or choose Centennial , CO

**Zip/Postal code:** 80015 *Required*

Country:

You can type in the city and state or select it from the drop-down box.

**Contact**

Phone (home): 719-777-8787 *Shows on transit slips*

Phone (work): 719-777-888

Phone (cell): 719-345-7890

Email (home): sallyexample@yahoo.com *Shows on transit slips*

Email (work): sallyexample@work.com

Fax: 719-323-6555

Email addresses are used for sending notices in Koha.

**Alternate address**

---

Address:

Address 2:

City, State:

Zip/Postal code:

Country:

Phone:

Email:

Contact note:

Enter the patron's secondary address.

---

**Alternate Contact**

Surname:

First name:

Address:

Address 2:

City, State:

Zip/Postal code:

Country:

Phone:

If there is an alternate contact, complete this section.

## Library Management

Category:

Library:

Work Libraries: ASCC

Sort 1:

Sort 2:

Card number:  *Required*

Scan or type the barcode into this field.

## Library set-up

Registration date:  

Expiry date (leave blank for auto calc)  

The registration date will be filled in automatically. If you want a specific expiration date for this patron, enter it here.

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 login

OPAC Login:

Password:   
Minimum password length: 3

The barcode is the login used for the OPAC. Password can be the patron's last name. Patrons can change their own password in the OPAC later.

## Disable Borrower Reading History

Yes  No  *If you disable a borrower's reading history, it will be permanently erased.*

Default value is enabled regarding the retention of reading history for new patrons. Assuming reading history is turned on; existing patrons can enable/disable reading history on the My Reading History tab in their account.

If your library uses any of the following attributes and identifiers, fill in as is appropriate.

**Additional attributes and identifiers**

Type	Value	
CO-COUNTY (CO-COUNTY)	<input type="text"/>	<a href="#">Clear</a>
GRADE (GRADE)	<input type="text"/>	<a href="#">Clear</a>
INACTIVE (Inactive barcodes)	<input type="text"/>	<a href="#">Clear</a> <a href="#">New</a>
LIMONBKMBL (Lincoln County Bookmobile Patrons)	<input type="text"/>	<a href="#">Clear</a>
LMLBSTAT0 (BSTAT0 Field for Limon Memorial Library)	<input type="text"/>	<a href="#">Clear</a>
LMLBSTAT1 (BSTAT1 Field for Limon Memorial Library)	<input type="text"/>	<a href="#">Clear</a>
LMLBSTAT2 (BSTAT2 Field for Limon Memorial Library)	<input type="text"/>	<a href="#">Clear</a>
MVSGRADE (Grade level for Mtn Valley School students)	<input type="text"/>	<a href="#">Clear</a>
OLDKEY (Old horizon key)	<input type="text"/>	<a href="#">Clear</a>
SANGGRADE (Grade level for Sangre de Cristo students)	<input type="text"/>	<a href="#">Clear</a>
SANGSCHOOL (Sangre de Cristo students' school)	<input type="text"/>	<a href="#">Clear</a>
SECONDID (Horizon second id )	<input type="text"/>	<a href="#">Clear</a>
SIERRGRADE (Grade level for Sierra Grande students)	<input type="text"/>	<a href="#">Clear</a>
STUDENTID (Student ID)	<input type="text"/>	<a href="#">Clear</a>
WEHOMEROOM (Westend Homeroom)	<input type="text"/>	<a href="#">Clear</a>
WELDGRADE (Grade level for Weld students)	<input type="text"/>	<a href="#">Clear</a>
WELDHR (Homeroom for Weld students)	<input type="text"/>	<a href="#">Clear</a>
WELDSCHOOL (Weld students' school)	<input type="text"/>	<a href="#">Clear</a>
WELDTEACH (Teacher for Weld students)	<input type="text"/>	<a href="#">Clear</a>
WESTUID (West End School ID Number from Infinite Campus)	<input type="text"/>	<a href="#">Clear</a>

**Patron messaging preferences**

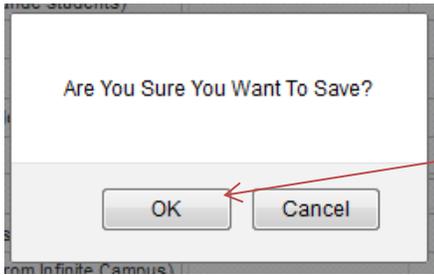
	Days in advance	Email	Digests only?
Item Checkout	-	<input type="checkbox"/>	-
Item DUE	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hold Filled	-	<input checked="" type="checkbox"/>	-
Item Check-in	-	<input type="checkbox"/>	-
Advance Notice	2 <input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

This section indicates which enhanced notices the patron will receive via email. Each patron type will be set up with defaults that can be changed as you add the patron record.

[Cancel](#)

Review the information you have entered. Click the Save button.

A pop up screen will display asking if you are sure.



Pressing the "Enter" key or clicking on the "OK" button will save the record.

- Once the record is saved, you will see details for the new patron and can now check out items, creating borrowing relationships or edit the record.

**Sally Example**  
(12345668901234)

123 Colorado Aven  
Centennial, CO 80015  
719-777-8787  
[sallyexample@yahoo.com](mailto:sallyexample@yahoo.com)  
Category: Adult (ADULT)  
Home Library: CLIC Library (C000)

Edit
Add child
Change Password
Print
More

**Ms Sally Example (12345668901234)**

123 Colorado Aven  
Centennial, CO 80015

Home: 719-777-8787  
Mobile: 719-345-7890  
Work: 719-777-888  
Fax: 719-323-6555  
Email (home): [sallyexample@yahoo.com](mailto:sallyexample@yahoo.com)  
Email (work): [sallyexample@work.com](mailto:sallyexample@work.com)  
Middle Initial(s):  
Date of birth: 01/02/1976  
Sex: F

[Edit](#)

**Additional attributes and identifiers**

Type	Value
<a href="#">Edit</a>	

**Patron Lists**

Name

Add patron to list:

**Patron messaging preferences**

	Days in advance	Email	Digests only?
Item Checkout	-	<input type="checkbox"/>	-
Item DUE	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hold Filled	-	<input checked="" type="checkbox"/>	-
Item Check-in	-	<input type="checkbox"/>	-
Advance Notice	2 <input type="button" value="v"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Edit](#)

**Library use**

Card number: 12345668901234  
Borrowernumber: 203332  
Category: Adult (ADULT)  
Registration date: 04/09/2013  
Expiration date: 04/09/2016  
Library: CLIC Library (C000)  
Work Libraries: (none, not staff)  
OPAC login: 12345668901234  
OPAC password: \*\*\*\*\*

[Edit](#)

**Alternate Address**

Address: 234 Park Ave.  
Address 2:  
City, State: Phoenix, AZ  
Zip/Postal Code: 123456  
Country:

[Edit](#)

**Alternative Contact**

Surname:  
First name:  
Address:  
Address 2:  
City, State:  
Zip/Postal Code:  
Country:  
Phone:

[Edit](#)

Checked Out

Fines & Charges

On Hold (0)

Revision History

Patron has nothing checked out.

9. You can add an associated child record to the patron.

Click Add child button.

**Ms Sally Example (12345678901234)**

123 Colorado Aven  
Centennial , CO 80015

Home: 719-777-8787  
Mobile: 719-345-7890  
Work: 719-777-888  
Fax: 719-323-6555  
Email (home): [sallyexample@yahoo.com](mailto:sallyexample@yahoo.com)  
Email (work): [sallyexample@work.com](mailto:sallyexample@work.com)  
Middle Initial(s):  
Date of birth: 01/02/1976  
Sex: F

[Edit](#)

**Library use**

Card number: 12345678901234  
Borrowernumber: 126177  
Category: Adult (ADULT)  
Registration date: 05/06/2011  
Expiration date: 05/06/2016  
Library: CLiC Office (C000)  
Work Libraries: (none, not staff)  
OPAC login: 12345678901234  
OPAC password: \*\*\*\*\*

[Edit](#)

10. Fill out the form for the child. Some of the information is transferred from the parent record (the adult patron is the “guarantor”).

### Add Child patron

**Patron identity**

Salutation:

Surname:  *Required*

First name:

Middle Initial(s):

Date of birth:

Other name:

Female  Male  N/A

**Guarantor Information**

Patron #: [126177](#)

Surname: Example

First name: Sally

Relationship:

**Main address**

Address:

Address 2:

City, State:  or choose

Zip/Postal code:  *Required*

Country:

Complete this section for the child you are adding.

This information is from the adult record. Choose the relationship from the drop down menu.

### Contact

Phone (home):  *Shows on transit slips*  
Phone (work):   
Phone (cell):   
Email (home):  *Shows on transit slips*  
Email (work):   
Fax:

### 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:

### Library Management

Category:  ▼  
Library:  ▼  
Work Libraries: ASCC  
Sort 1:   
Sort 2:   
Card number:  *Required*

Enter or scan library barcode.

### Library set-up

Registration date:

Expiry date  
(leave blank for auto calc)

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 login

OPAC Login:

Password:   
Minimum password length: 3

### Disable Borrower Reading History

Yes  No  If you disable a borrower's reading history, it will be permanently erased.

### Patron messaging preferences

	Days in advance	Email	Digests only?
Item Checkout	-	<input type="checkbox"/>	-
Item DUE	-	<input type="checkbox"/>	<input type="checkbox"/>
Hold Filled	-	<input type="checkbox"/>	-
Item Check-in	-	<input type="checkbox"/>	-
Advance Notice	0 ▼	<input type="checkbox"/>	<input type="checkbox"/>

[Cancel](#)

Review and save the record.

11. Once the record is saved, you will see details for the child patron and can now check out items, or edit the record.

[Home](#) > [Patrons](#) > Patron Details for Jane Example (23456789012345)

**Jane Example**  
(23456789012345)

123 Colorado Aven  
Centennial , CO 80015  
719-777-8787  
[sallyexample@yahoo.com](mailto:sallyexample@yahoo.com)  
Category: Elementary  
School (ELEM)  
Home Library: CLiC Office  
(C000)

Edit
Change Password
Print
More

**Jane Example (23456789012345)**

123 Colorado Aven  
Centennial , CO 80015

Home: 719-777-8787  
Mobile: 719-345-7890  
Work: 719-777-888  
Fax: 719-323-6555  
Email (home): [sallyexample@yahoo.com](mailto:sallyexample@yahoo.com)  
Email (work): [sallyexample@work.com](mailto:sallyexample@work.com)  
Middle Initial(s):  
Date of birth: 12/29/1999  
Sex: F  
Guarantor: [Example, Sally](#)

[Edit](#)

**Library use**

Card number: 23456789012345  
Borrowernumber: 126178  
Category: Elementary School (ELEM)  
Registration date: 05/06/2011  
Expiration date: 05/06/2014  
Library: CLiC Office (C000)  
Work Libraries: (none, not staff)  
OPAC login:  
OPAC password: [Undefined](#)

[Edit](#)

**Alternate Address**

[Check Out](#)

[Details](#)

[Lost Items](#)

[Fines](#)

[Clubs & Services](#)

[Edit](#)

12. If you wish to add another child, you will need to return to the parent record.