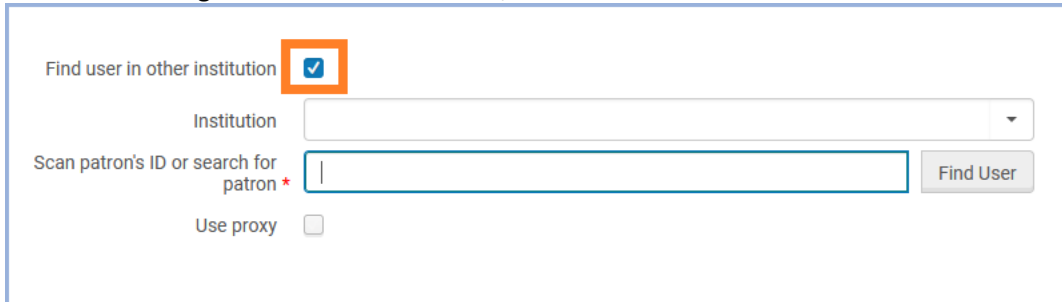


Loan Items to I-Share Patrons

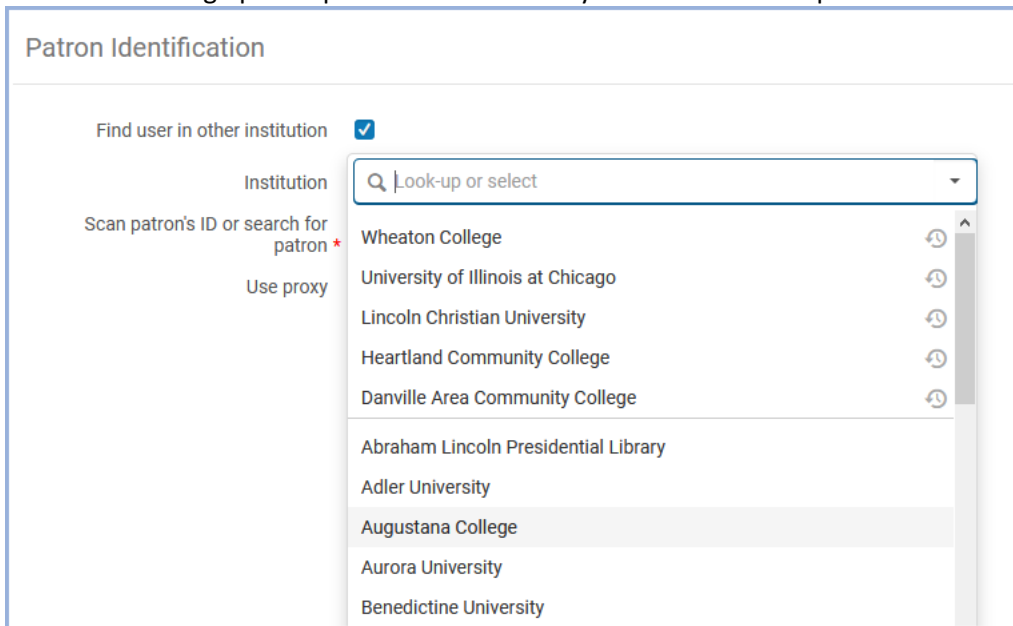
I-Share patrons from other institutions may request to pick up books at any campus library, and may also browse and check out items. The process to loan items out to an I-Share patron involves a few extra steps.

1. In the Manage Patron Services screen, check the box beside “Find user in other institution”.



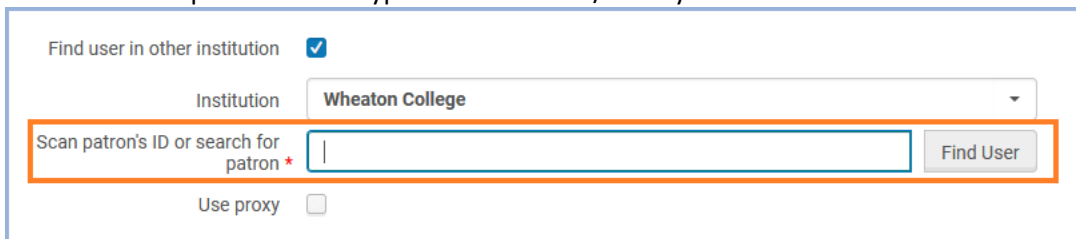
The screenshot shows the 'Manage Patron Services' interface. The checkbox for 'Find user in other institution' is checked and highlighted with an orange box. Below it, there is an 'Institution' dropdown menu, a text input field for 'Scan patron's ID or search for patron *', and a 'Find User' button. The 'Use proxy' checkbox is unchecked.

2. This will bring up a drop-down menu where you can choose the patron's home institution.



The screenshot shows the 'Patron Identification' screen. The 'Find user in other institution' checkbox is checked. The 'Institution' dropdown menu is open, displaying a list of institutions: Wheaton College, University of Illinois at Chicago, Lincoln Christian University, Heartland Community College, Danville Area Community College, Abraham Lincoln Presidential Library, Adler University, Augustana College, Aurora University, and Benedictine University. The 'Scan patron's ID or search for patron *' text input field is empty.

3. Scan in the patron's ID or type in the Barcode/Library number from their ID. Then click “Find User”.



The screenshot shows the 'Patron Identification' screen. The 'Find user in other institution' checkbox is checked. The 'Institution' dropdown menu is set to 'Wheaton College'. The 'Scan patron's ID or search for patron *' text input field is empty and highlighted with an orange box. The 'Find User' button is also highlighted with an orange box. The 'Use proxy' checkbox is unchecked.

4. If the patron already has an I-Share record, it will open to the Loans tab and you can proceed as you would a local patron.

Note: An I-Share patron would already have a record at our institution if they had previously requested material to be picked up at UIUC.

5. If they do not have an I-Share record, the Quick User Management screen will open, and the fields will be filled with information pulled from the patron's record at their home institution. Make sure all required fields (marked with a red asterisk) are filled out and click "Update User".

Quick User Management

Cancel Update User

Not local

Find user in other institution Institution Wheaton College

Scan patron's ID or search for patron BMLSW1 Find User

User Details

USER INFORMATION

First name *	Sam	Middle name	
Last name *	Student	Preferred first name	
Preferred middle name		Preferred last name	
Primary identifier *	5455310390005899	Title	
Job category	Circulation Desk Student	PIN number	Generate
Gender		Job description	
Campus		User group *	I-Share
Birth date		Preferred language	English
Purge date *	08/12/2020 X	Expiration date *	05/05/2020 X
Purchase request library		Resource sharing library	
	Selected Patron Letters	Cataloger level	[00] Default Level

USER MANAGEMENT INFORMATION

6. If any required fields are empty, you will get an error message. If that happens, ask the patron for that information, enter it into the required fields, and click "Update User" again.


Cancel Update User

• The field **State/Province** is mandatory, please enter the required data.

• The field **Postal code** is mandatory, please enter the required data.

7. Once that's completed, it will open to the "Loans" tab and you will be able to proceed with the transaction as you would a local patron.

← Patron Services Edit User Info Submit Request Refresh Blocks/Notes Done



Student, Sam

Active balance 0.00 USD Send Activity Report

ID 5455310390005899 Send Requests Report

User group I-Share


User Notes ▾

[Add Note](#)

Loans Returns Requests

Scan item barcode * ☰ OK [Create Item](#)

Loan Display : **Loans of this session** ▾


No records were found.