

Loan Items to I-Share Patrons

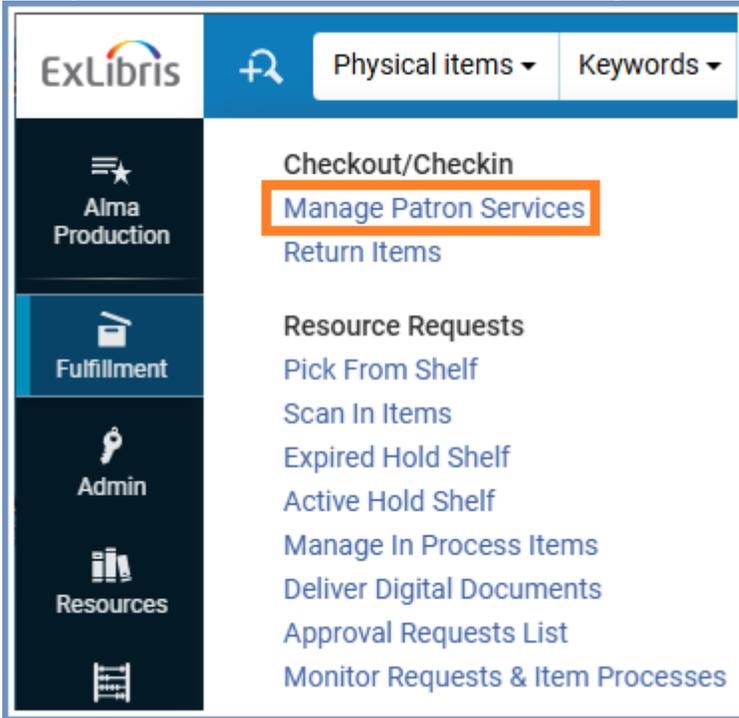
Patrons from I-Share institutions may request to pick up books at any campus library, and may also browse and check out items. The process to loan items out to an I-Share patron involves a few extra steps.

Basic Steps:

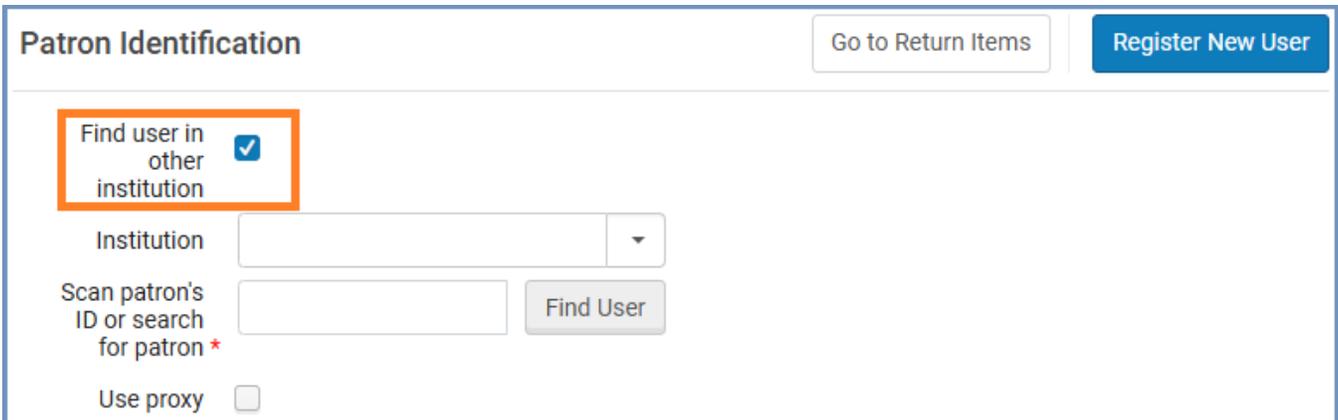
- Open the “Fulfillment” menu and select “Manage Patron Services”.
- Check the checkbox for “Find user in other institution”.
- Use the “Institution” drop-down menu to select the patron’s home institution.
- Scan or type in the Barcode/Library number from the patron’s ID. Then click “Find User”.
 - If the “Quick User Management” screen pops up, check that all of the required fields have populated with information pulled from the patron’s record at their home institution, then click “Update User”.
 - If only a few required fields are empty, and they’re for minor details such as the postal code, get that information from the patron and enter it. Then click “Update User” again.
 - If most or all of the required fields are empty, go to the “Manage Patron Services” screen again and try one or more of the steps below:
 - Re-enter the institution and the Barcode/Library number to make sure they’re correct.
 - Check the front and back of the ID for a different number or barcode to enter.
 - Enter the patron’s name instead of the Barcode/Library number.
 - Verify with the patron that this is their current ID and that they are currently affiliated with that institution.
- Once the patron’s account is open, proceed with the transaction as you would for a local patron.

Detailed Workflow:

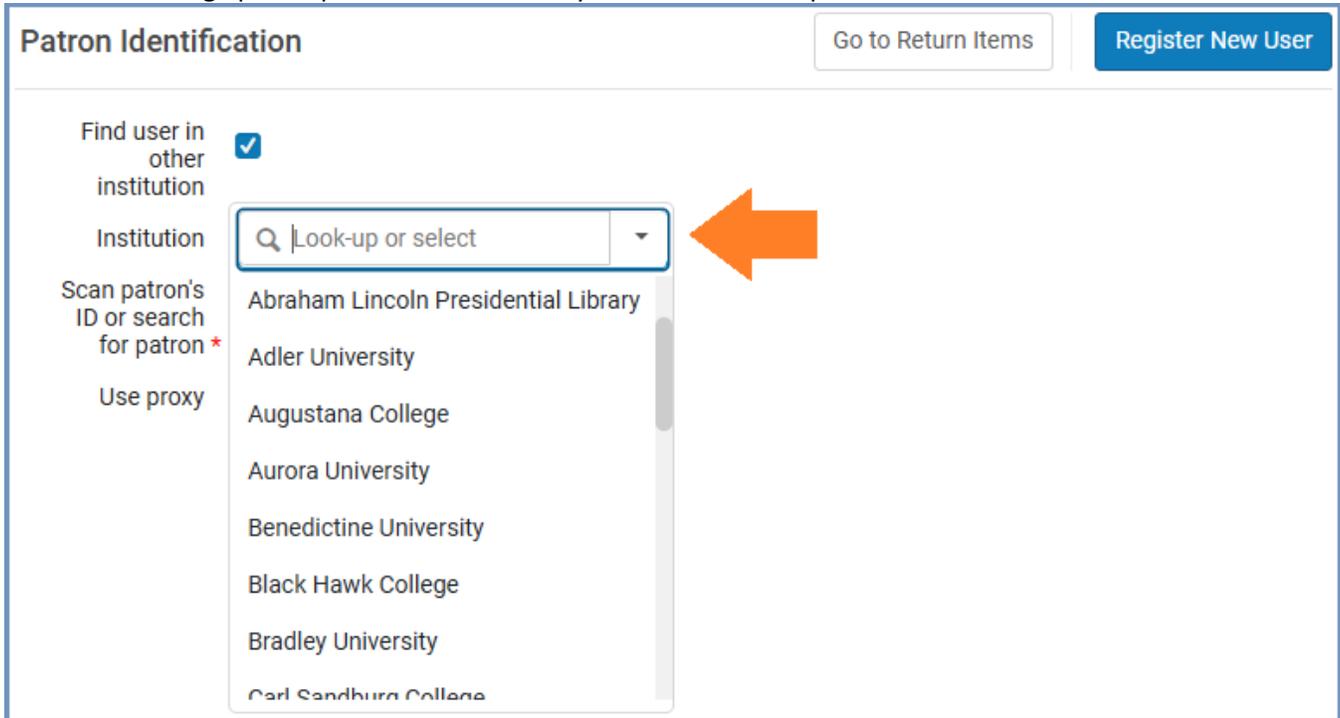
1. Open the “Fulfillment” menu and select “Manage Patron Services”.



2. Check the box beside “Find user in other institution”.

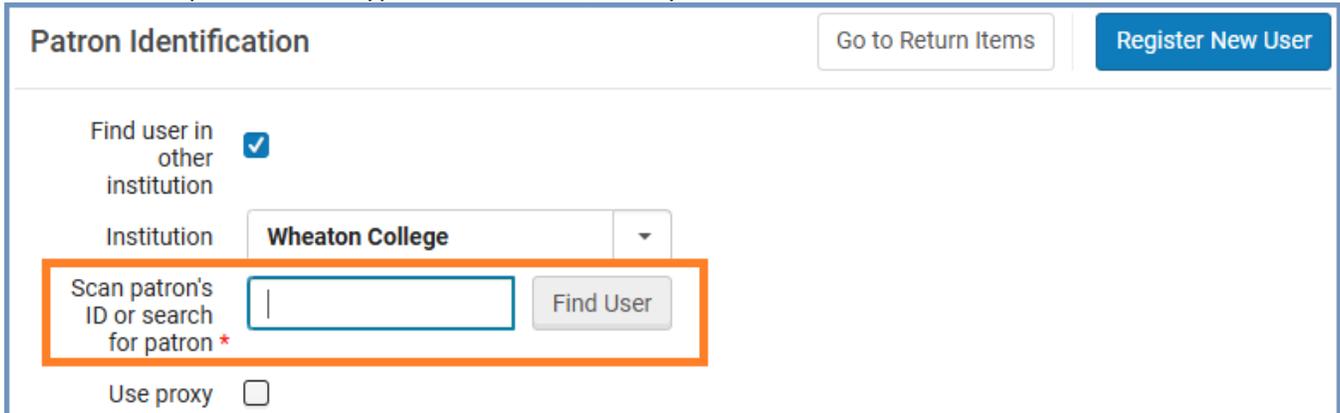


3. This will bring up a drop-down menu where you can choose the patron's home institution.



The screenshot shows the 'Patron Identification' form. At the top right, there are two buttons: 'Go to Return Items' and 'Register New User'. The form contains several fields: 'Find user in other institution' with a checked checkbox, 'Institution' with a dropdown menu showing a search bar and a list of institutions, 'Scan patron's ID or search for patron *' with an empty input field, and 'Use proxy' with an unchecked checkbox. An orange arrow points to the dropdown menu, which lists the following institutions: Abraham Lincoln Presidential Library, Adler University, Augustana College, Aurora University, Benedictine University, Black Hawk College, Bradley University, and Carl Sandburg College.

4. 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' form. At the top right, there are two buttons: 'Go to Return Items' and 'Register New User'. The form contains several fields: 'Find user in other institution' with a checked checkbox, 'Institution' with a dropdown menu showing 'Wheaton College', 'Scan patron's ID or search for patron *' with an empty input field and a 'Find User' button, and 'Use proxy' with an unchecked checkbox. An orange box highlights the 'Scan patron's ID or search for patron *' input field and the 'Find User' button.

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

6. If they do not have an I-Share record at our institution yet, 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 then click "Update User".

Quick User Management Cancel Update User

Not local ▼

Find user in other institution

Proxy Settings ▼

Add as a fulfillment proxy i

User Details ▼

USER INFORMATION

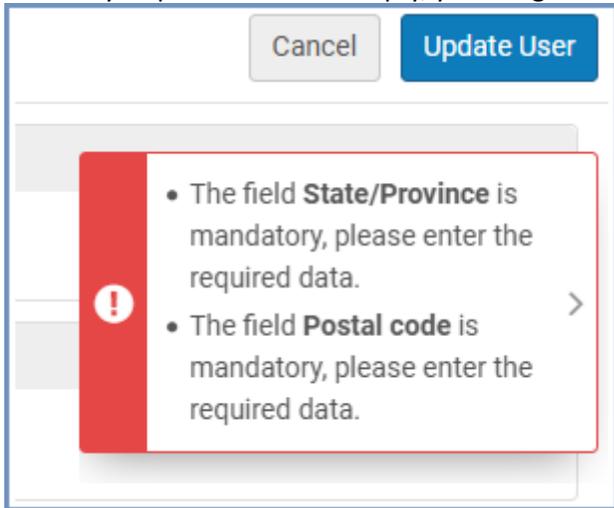
First name	<input type="text" value="Sam"/>	Middle name	<input type="text"/>
Last name *	<input type="text" value="Student"/>	Preferred first name	<input type="text"/>
Preferred middle name	<input type="text"/>	Preferred last name	<input type="text"/>
Primary identifier *	<input type="text" value=""/>	User group *	<input type="text" value="I-Share"/> ▼
Expiration date *	<input type="text" value="03/01/2025"/> X 📅	Purge date *	<input type="text" value="08/12/2025"/> X 📅
Cataloger level	<input type="text" value="[00] Default Level for Bib Records-"/> ▼		

Selected Patron Letters

USER MANAGEMENT INFORMATION

Patron has

7. If any required fields are empty, you will get an error message.



- a. If only a few required fields are empty, and they're for minor details such as the postal code, ask the patron for that information, enter it into the required fields, and click "Update User" again.
- b. If most or all of the required fields are empty, it means that Alma was not able to find the patron's record at their home institution with the information that you entered. Go to the "Manage Patron Services" screen again and try one or more of the steps below to troubleshoot.
 - i. Re-enter the institution and the Barcode/Library number to make sure that they're correct.
 - ii. Check the front and back of the ID card to see if there's a different number or barcode that should be entered instead.
 - iii. Enter the patron's name instead of the Barcode/Library number.
 - iv. Verify with the patron that this is their current ID and that they are currently affiliated with that institution.

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

The screenshot displays the 'Loans' interface for a user named Sam. The interface is divided into a left sidebar and a main content area. The sidebar contains a user profile for 'Student, Sam' with a 'Done' button and a menu icon. Below the profile are navigation options: 'Loans (0)', 'Returns (0)', 'Requests (0)', and 'Fines and Fees'. Further down, the sidebar shows user group information for 'I-Share' with an expiration date of 03/01/2025, an active balance of 0.00 USD, and accrued fines of 0.00 USD. At the bottom of the sidebar is a 'System notes' section, which is currently empty, displaying 'No system notes were found'.

The main content area is titled 'Loans' and features a search bar with the placeholder text 'Scan Item Barcode' and an 'OK' button. To the right of the search bar is a '+ Create Item' button. Below the search bar is a filter dropdown set to 'This Session' and a 'Clear All' button. The main area also contains several icons for refresh, search, settings, and help. The central part of the main area displays a message: 'No records were found.' with a list icon above it.