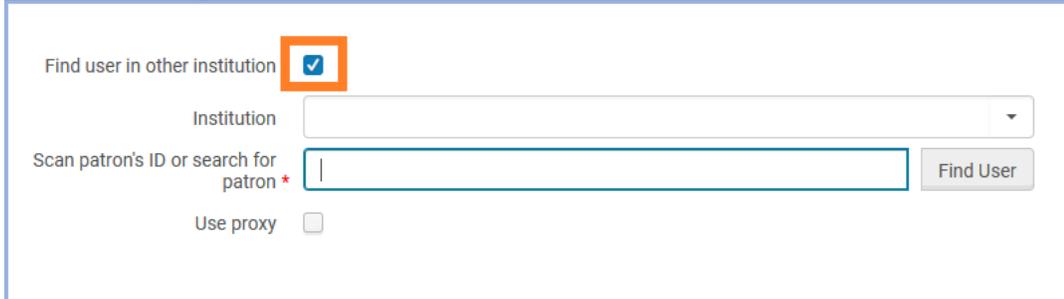


Loan Items to I-Share Patrons

Documentation by Jenna Zeidler, University of Illinois – Urbana-Champaign

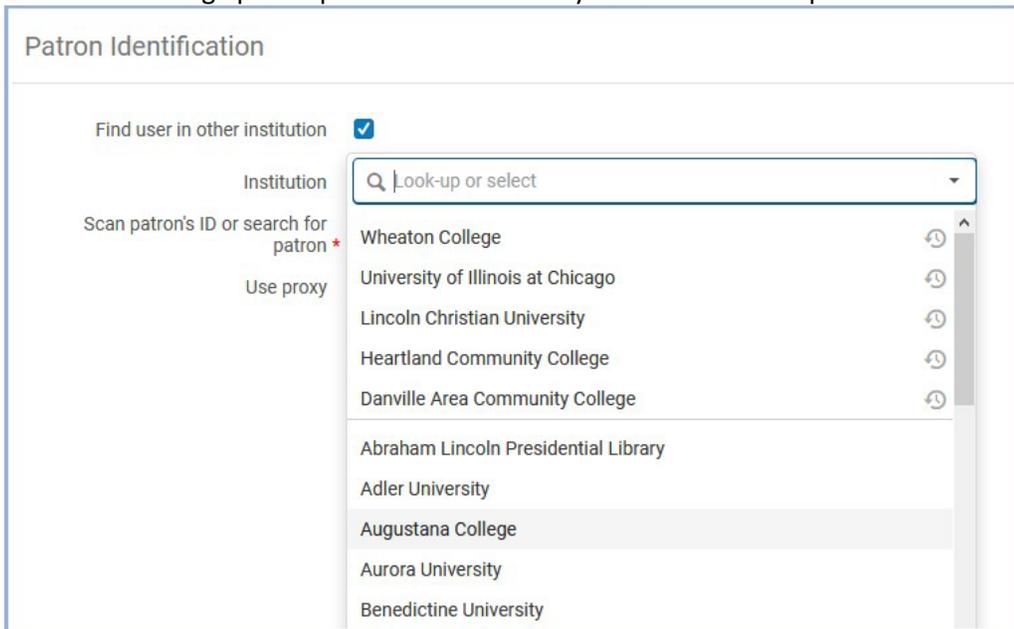
I-Share patrons from other institutions may request to pick up books at any campus library, and may also browse and check out items. The process to loan items out to an I-Share patron involves a few extra steps.

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



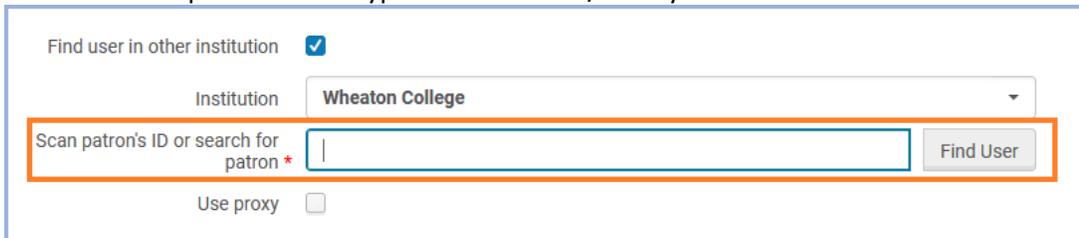
A screenshot of a web form titled "Find user in other institution". The checkbox for "Find user in other institution" is checked and highlighted with an orange box. Below it is a dropdown menu for "Institution". There is a text input field for "Scan patron's ID or search for patron *" and a "Find User" button. A "Use proxy" checkbox is also present and unchecked.

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



A screenshot of a web form titled "Patron Identification". The checkbox for "Find user in other institution" is checked. The "Institution" dropdown menu is open, showing a search bar and 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 *" field is empty. The "Use proxy" checkbox is unchecked.

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



A screenshot of the same web form as in step 1. The "Institution" dropdown menu now shows "Wheaton College" selected. The "Scan patron's ID or search for patron *" text input field is highlighted with an orange box. The "Find User" button is also highlighted with an orange box. The "Use proxy" checkbox remains 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.

- 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 User group * I-Share

Campus Preferred language English

Birth date Expiration date * 05/05/2020 X

Purge date * 08/12/2020 X

Purchase request library Resource sharing library

Cataloger level [00] Default Level

Selected Patron Letters

USER MANAGEMENT INFORMATION

- 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.