

Loan Items to Local Patrons

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How to Loan Items

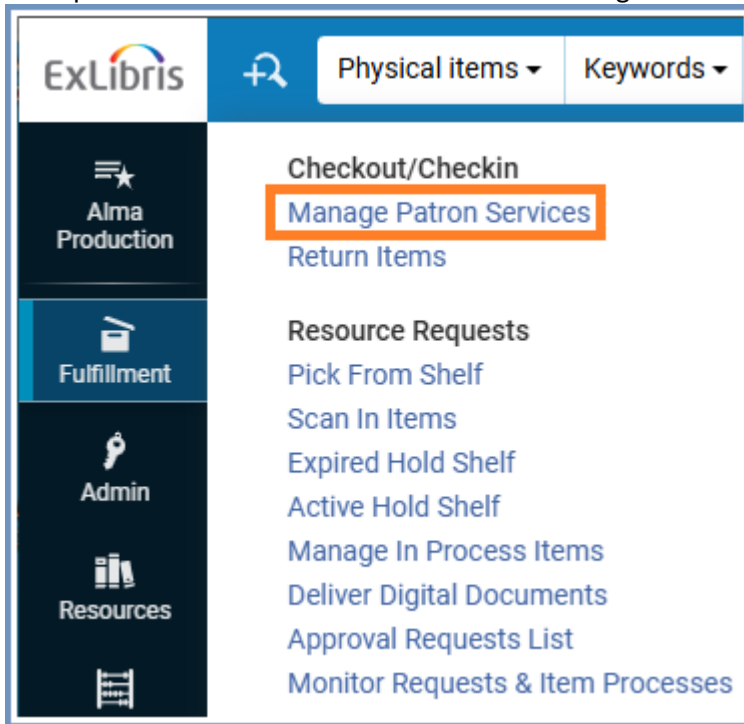
Alma video: [Working at the Circulation Desk](#)

Basic Steps:

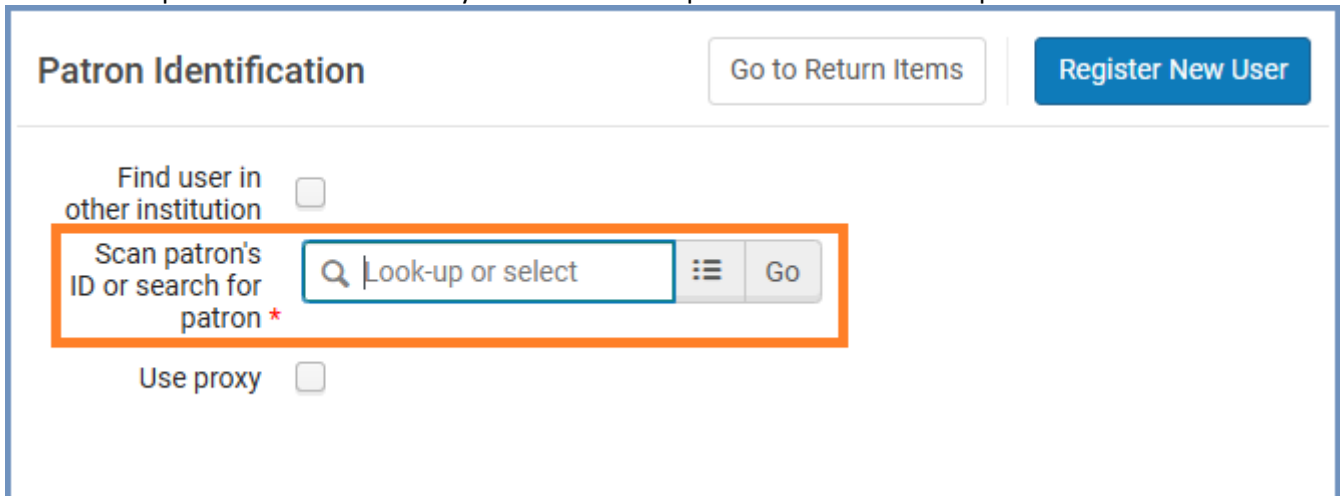
- Open the “Fulfillment” menu and select “Manage Patron Services”.
- Scan in the patron’s card.
- Scan in the item barcodes.
- Click the “Done” button.

Detailed Workflow:

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



2. Scan the patron’s i-card or courtesy card in the “Scan patron’s ID or search for patron” field.



3. The patron record will open to the Loans tab by default.

The screenshot shows the 'My Institution - Loans' interface. On the left sidebar, the 'Loans (0)' tab is highlighted with a blue bar and an orange arrow pointing to it. Below it are 'Returns (0)', 'Requests (0)', and 'Fines and Fees'. The main content area has a search bar labeled 'Scan Item Barcode' and a 'Create Item' button. Below the search bar, there's a filter dropdown set to 'This Session' and a 'Clear All' button. The main area displays a message: 'No records were found.' with a list icon.

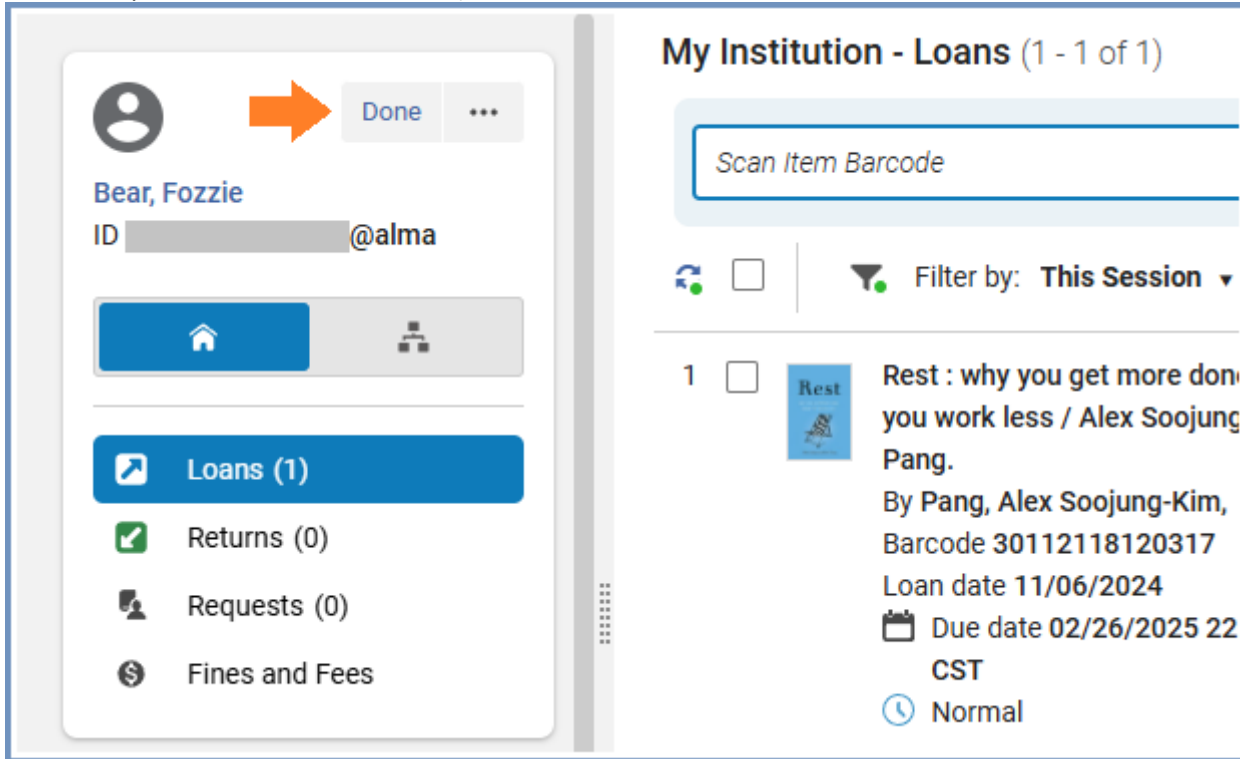
4. Scan the item barcodes into the “Scan item barcode” field.

5. The checked-out items will display in a list below the “Scan item barcode” field.

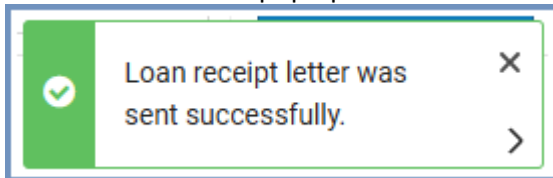
The screenshot shows the 'My Institution - Loans' interface with one item listed. The left sidebar is the same as in the previous screenshot, but the 'Loans (1)' tab is now selected. The main content area shows a search bar and a filter dropdown set to 'This Session'. Below the search bar, there is a list of items. The first item is:

1	<input type="checkbox"/>		Rest : why you get more done when you work less / Alex Soojung-Kim Pang. By Pang, Alex Soojung-Kim, Barcode 30112118120317 Loan date 11/06/2024 Due date 02/26/2025 22:00:00 CST Normal	Owning library Main Stacks Call number QP301 .P336 2016	Work Order ...
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6. Click the "Done" button when you are finished. (It's above the patron's name, close to the upper right corner of the patron information section.)



7. After you click "Done", the patron will receive a notification email that the items are checked out to them. Alma will show a pop-up notification to confirm that it was sent.



Loan Display Options

Change the List View

- The list of loans can be in either Record View or Table View. To switch, click the “Switch” icon near the top right of the list. If you’re currently in Record View, the icon will show a stylized table.

My Institution - Loans (1 - 2 of 2)

Scan Item Barcode | OK | [+ Create Item](#)

| Sort by: **Due Date** ▾ | Filter by: **All** ▾ | Renew Selected | [Renew All](#)

1 **The knowledge illusion : why we never think alone / Steven Sloman and Philip Fernbach.** Owing library Main Stacks
 By Sloman, Steven A., Call number B105.T54
 Barcode 30112120527343 S56 2017
 Loan date 11/12/2024
 Due date 03/04/2025 22:00:00 CST
 Normal Switch to table view

2 **Rest : why you get more done when you work less / Alex Soojung-Kim Pang.** Owing library Main Stacks
 By Pang, Alex Soojung-Kim, Call number QP301
 Barcode 30112118120317 .P336 2016
 Loan date 11/12/2024
 Due date 03/04/2025 22:00:00 CST
 Normal [Renew](#)

- Table View shows each category of information in the same column for each loan.

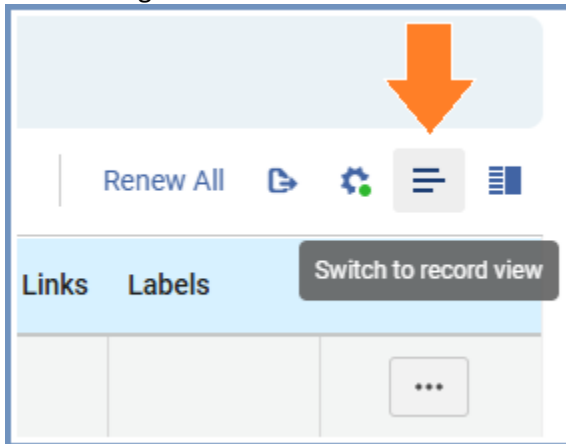
My Institution - Loans (1 - 2 of 2)

Scan Item Barcode | OK | [+ Create Item](#)

| Sort by: **Due Date** ▾ | Filter by: **All** ▾ | Renew Selected | [Renew All](#)

	↕ Title	▲ Due date	Barcode	↕ Loan date	↕ Loan status	Links	Labels
1	<input type="checkbox"/> The knowledge illusion : why we never think alone / Stev...	03/04/2025 22:00:00 CST	30112120527343	11/12/2024	Normal		
2	<input type="checkbox"/> Rest : why you get more done when you work less / Alex...	03/04/2025 22:00:00 CST	30112118120317	11/12/2024	Normal		

- The icon to switch back to Record View is in the same location. It has three horizontal lines of different lengths.



Filter What's Listed

- The Loans tab can show all of a patron's loans (either local loans or I-Share loans), or just the loans of this session (both local and I-Share loans).
 - The filter will stay the same until you change it, even between different patrons. For instance, if you had the filter set to "All" when you closed one patron's account, then it will be set to "All" when you open the next patron's account.
- To switch between these options, click on the words to the right of "Filter by:" (either "All" or "This Session") for a drop-down menu, and select the other option from the menu.

The screenshot shows the 'My Institution - Loans' page for a patron named Ruxpin, Teddy. The interface includes a search bar at the top with the text 'Scan Item Barcode'. Below the search bar, there are controls for sorting and filtering. The 'Filter by:' dropdown is currently set to 'All'. An orange arrow points to the 'All' text in the dropdown menu. The main content area displays a single loan item: 'Inventing the classics : modernity, national identity, and Japanese literature / edited by Haruo Shirane and Tomi Suzuki.' The loan details include the barcode (30112052256176), loan date (11/07/2024), due date (02/27/2025 22:00:00 CST), and normal status. The item is located in the 'Owning library Main Stacks' with call number 895.609 In82. A 'Renew' button and a three-dot menu are visible next to the item.

- If the browser window is too small to show the words, click on the funnel-shaped icon to make them appear.

The screenshot shows the 'My Institution - Loans' page for a patron named Fish, Stackles. The interface is similar to the previous one, but the 'Filter by:' dropdown is now set to 'This Session'. An orange arrow points to the funnel-shaped icon in the filter area, which has triggered the dropdown menu. The dropdown menu shows 'Filter by: This Session' and a 'Clear All' button. The main content area is currently empty, indicating that there are no loans listed for this session.

- To see all of the patron's I-Share loans (including any that were checked out before this session), use the toggle below the patron's name and ID.
 - The Institution icon, which looks like a house, is for local loans (that is, items from the University of Illinois Urbana-Champaign).

My Institution - Loans (1 - 2 of 2)

Scan Item Barcode

Sort by: Due Date

- The knowledge illusion : why we never think alone / Steven Sloman and Philip Fernbach.**
By Sloman, Steven A.,
Barcode 30112120527343
Loan date 11/12/2024
Due date 03/04/2025 22:00:00 CST
Normal
- Rest : why you get more done when you work less / Alex Soojung-Kim Pang.**
By Pang, Alex Soojung-Kim,
Barcode 30112118120317
Loan date 11/12/2024
Due date 03/04/2025 22:00:00 CST
Normal

User group AC EMPLY
Expiration date 12/31/2040
Active balance 0.00 USD
Accrued fines 0.00 USD

- The Network icon, which looks like a flowchart, is to show I-Share loans.

All Network - Loans (1 - 4 of 4)

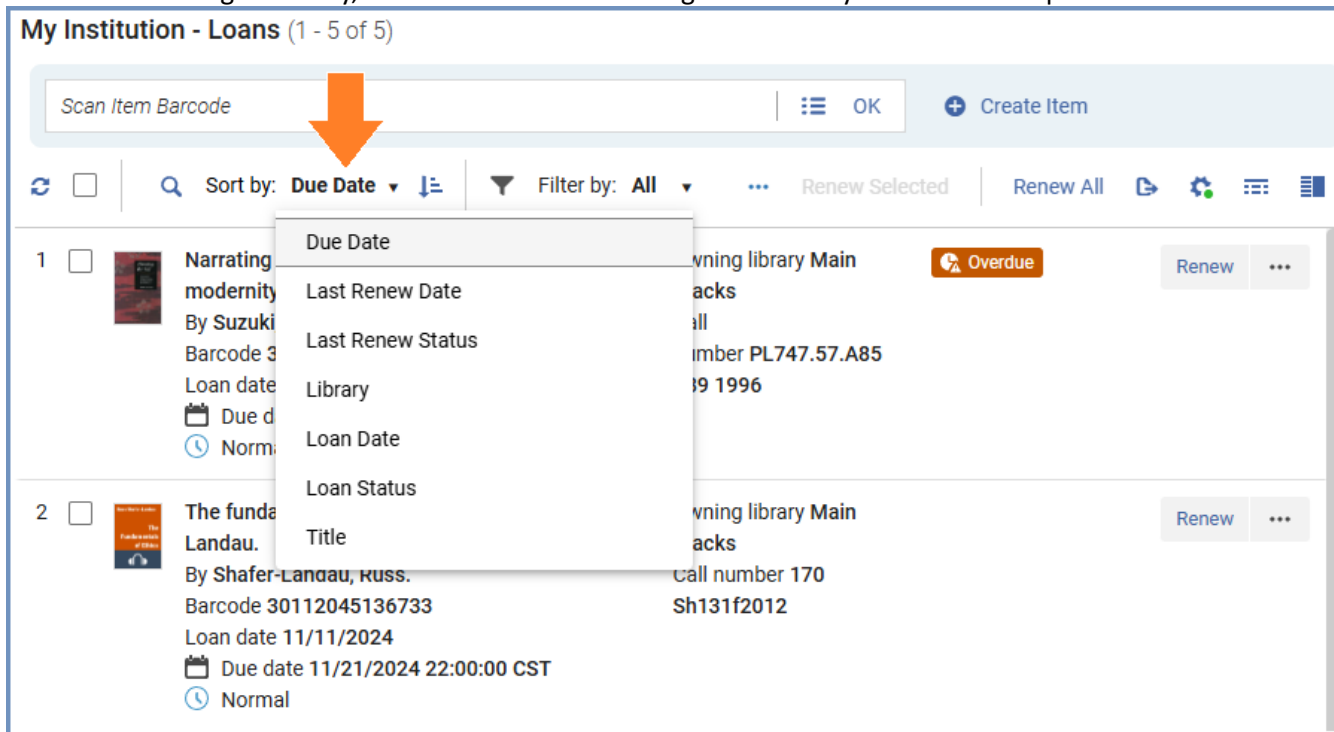
Sort by: Due date

- Gravity Falls journal 3 / written by Alex Hirsh, illustrated by Andy Gonsalves and Stephanie Hirsch.**
By Hirsch, Alex,
Barcode 15124004242344
Loan date 08/23/2024
Due date 12/08/2024 15:28:08 CST
Renewed
- The final gambit / Jennifer Lynn Barnes.**
By Barnes, Jennifer Lynn,
Barcode 35200002291503
Loan date 09/24/2024
Due date 12/08/2024 15:28:13 CST
Renewed
- The Martian : classroom edition / by Andy Weir.**
By Weir, Andy,

Return to institution view for notes and user information

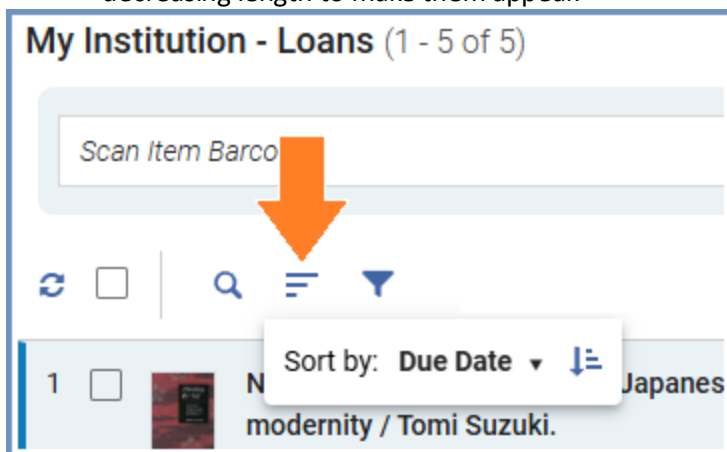
Sort the List

- If you have selected “Filter by: All”, there will be an option to sort the list of loans. To change what the list is being sorted by, click on the words to the right of “Sort by” to reveal a drop-down menu.



The screenshot shows the 'My Institution - Loans' page with a search bar at the top containing 'Scan Item Barcode'. Below the search bar, there are controls for 'Sort by: Due Date' and 'Filter by: All'. A dropdown menu is open under 'Sort by', listing various sorting options: Due Date, Last Renew Date, Last Renew Status, Library, Loan Date, Loan Status, and Title. The list below shows two items: 'Narrating modernity' by Tomi Suzuki and 'The fundamental' by Shafer-Landau, Russ. The first item is marked as 'Overdue'.

- If the browser window is too small to show the words, click on the icon with three horizontal lines of decreasing length to make them appear.



The screenshot shows the 'My Institution - Loans' page in a mobile view. The search bar contains 'Scan Item Barco'. Below the search bar, there are icons for search, sort (three horizontal lines of decreasing length), and filter. A dropdown menu is open under the sort icon, showing 'Sort by: Due Date' with a downward arrow and a sort icon. The list below shows one item: 'Narrating modernity / Tomi Suzuki'.

- Note that when the items are sorted by title, words like “the” are included in the alphabetization.

My Institution - Loans (1 - 5 of 5)

Scan Item Barcode | OK | Create Item

| Sort by: **Title** | Filter by: **All** | Renew Selected | Renew All

1	<input type="checkbox"/>	 Narrating the self : fictions of Japanese modernity / Tomi Suzuki. By Suzuki, Tomi, Barcode 30112000157492 Loan date 11/11/2024 Due date 11/11/2024 22:00:00 CST Normal	Owning library Main Stacks Call number PL747.57.A85 S89 1996	Overdue	Renew ...
2	<input type="checkbox"/>	 The fundamentals of ethics / Russ Shafer-Landau. By Shafer-Landau, Russ. Barcode 30112045136733 Loan date 11/11/2024 Due date 11/21/2024 22:00:00 CST Normal	Owning library Main Stacks Call number 170 Sh131f2012		Renew ...
3	<input type="checkbox"/>	 The Greensboro Public Library : the first 100 years / by Helen Snow. By Snow, Helen, Barcode 30112078512545 Loan date 11/12/2024 Due date 12/10/2024 22:00:00 CST Normal	Owning library Main Stacks Call number Q. 027.4756 Sn614g		Renew ...
4	<input type="checkbox"/>	 The Literatures of India : an introduction / Edward C. Dimock, Jr. [and others]. By Dimock, Edward C. Barcode 30112037749907 Loan date 11/11/2024 Due date 12/10/2024 22:00:00 CST Renewed	Owning library Main Stacks Call number 891.109 L7121		Renew ...
5	<input type="checkbox"/>	 The mind and its world / Gregory McCulloch. By McCulloch, Gregory Barcode 30112005023400 Loan date 11/12/2024 Due date 12/10/2024 22:00:00 CST Normal	Owning library Main Stacks Call number 128.2 M139m		Renew ...