## SEARCHING & REQUESTING Workflow *(for your library patrons)*

1. *Login* in to ComCat

2. *Goto* **Search** box, *top center* of webpage, *defaults* to **Keyword** Search

    a. To modify the **default Keyword search**, *click* on the **check-box** (*far left of search box)* and switch to Author, Title, ISBN, etc.

    b. To modify the **default ALL Networks search**, *click* on **stack-of-coins icon** (*on left in search box)* and limit to one or any combination of networks (ex.: C/W MARS, Minuteman, SAILS, etc.)

3. *Type* in your search terms

    a. Due to the connection speed from different networks you may notice a **% bar** on the far upper left of the screen.
    b. You can click on the **red Stop** symbol to cancel proceeding if desired (i.e *found your item, no need to continue search*).

4. To **request** an item, *mouse-over* the "book cover" and *click* **Request This Item**

    a. When **Select a Patron** window appears, *type* in patron's **last name**. Then, *click* on the patron name (*will also show the patron barcode, and contact information*). *Only* patron's with **ComCat user accounts** are listed.

    b. When the **ILL Request – Record (loan)** window appears, ensure the following are **correct**: Need by; Patron Name; Patron email; Borrower notes for lending library (ex.: *Hard Cover edition*); Shipping Address.

    c. *Click* **Submit.**

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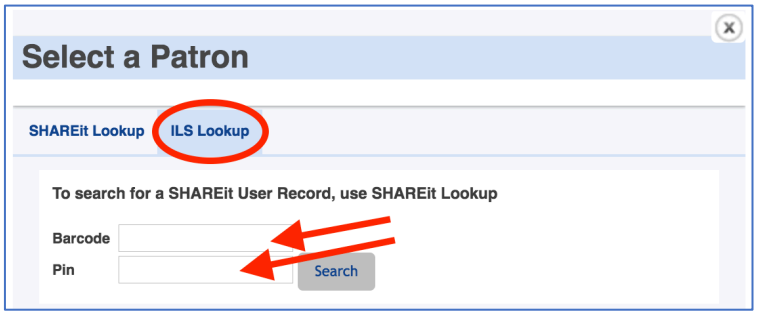
## **SEARCHING & REQUESTING Workflow** *(for <u>your</u> library patrons)*

5. *If* your **patron is NOT listed** in the **Select a Patron** window, *click* on the **ILS Lookup** tab *(it doesn't look like a tab, see below)*




   a. You *must have* the **patron barcode** and **PIN/password**. By filling this in you will automatically ***request*** the item in ComCat and ***create*** a ComCat user account for the patron.
   b. The **ComCat** patron barcode and password/PIN is the <u>*same*</u> one that the patrons uses for logging in to **MassCat** and **Axis 360 eBooks**.
   c. Library staff *cannot* see passwords in MassCat, but library staff can *change* a password for a patron in their MassCat patron record. A password change should register with ComCat *immediately*.

6. *Click* **Submit.**

7. Requests appear in **Request Manager > Borrower >Pending** *(lower left)*

8. *For next steps*, see **Borrowing Workflow**, next page.

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**BORROWING Workflow** (*Items for <u>your</u> library patrons*)

1. *Login* in to ComCat

2. *Click on,* **Staff Dashboard** > **Request Manager** > (BORROWING, left column)

3. *Look to Upper Left, click on and check:* > **Awaiting Approval, Not Received, Recalled,** etc.
    a. *Scan down* the list of potential borrowing conditions, address issues as needed.

4. *Check your delivery bin*. Any items that have been received for your patrons *with a* ***ComCat bookstrap,*** will need to be checked in to ComCat.

5. *Goto* **Shipped**. For each item listed, under **Status**, change *drop-box* to **Received**. *Click* on **Submit** (*upper right*).
    a. This will move the request to **Received** status and an **email** will be generated to *notify the patron*.
    b. This item can then be **checked out** to a patron *in* **MassCat.**
    c. The **only** time you scan a ComCat item's barcode in MassCat is to **check out** an item to your patrons.

6. *Look to Lower Left, click on and check:* >**Pending**

7. *Review* status of **Pending** items.
    a. *Pending* This is where you can **cancel** any requests.
    b. Under **Status**, *choose* **Request Cancel** in the *drop-box*.

8. RETURNED ITEMS:
    a. Always do this in **ComCat** *NOT MassCat!*
    *b*. *Goto* the **Staff Dashboard>Request Manager***, click* on **Received** under Status (*left column*).
    c. *Find* the title for item returned.
    d. Look to the right and find the Status column.
    e. Change the *drop-box* status from *Received* to **Returned**.
    f. *Click* on **Submit** (*upper right*).
    g. *Fill out* a **Delivery Slip** for item, and place in your Delivery bin for pick-up.

9. *For next steps*, see **Lending Workflow**, next page.

**LENDING Workflow** (*Items shipping to* <u>*other*</u> *ComCat libraries*)

1. Check **ComCat ILL *BEFORE* MassCat** ILL/Holds Queue
    - Remember to **ignore** any Holds Queue requests *in MassCat* from ComCat libraries, the ComCat library name and network code is your *visual cue*!

2. *Login* in to ComCat

3. *Click on,* **Staff Dashboard** > **Request Manager** >

4. *Look to Upper Right, click on,* > **Lender Requests** > **Pending**

5. *Print* **Pick List** *(button upper right),* go to the shelves and find 'em!

6. *After* your Pick List search, go back to *(upper right)* **Lender Requests** > **Pending**

7. *Click on hyperlinked title for each item,* up comes the **Full Record Display**
    - Look for any **Borrower Notes**.

8. Select "**Shipped**" or "**Will Not Supply**"
    - **Four days** to respond before request automatically moves to next lending library.

9. *If* you are *shipping*, scan the item barcode in to **Item Barcode (Lender)**.
   *NOTE:* an incorrect barcode sometimes appears, *delete it*, then scan.

10. *Click on* the **Submit** button *(upper right)*

11. *Go to* **Staff Dashboard > ILL Admin > Maintain Bookstraps**

12. create **Bookstrap** and **Delivery Slip**, place item in delivery bin.

13. When an item is **RETURNED** *(comes back to your library)*…
    *In* **ComCat**, change status of **Lender Requests** > **Returned** items to **"Check In."**
    <u>DO NOT</u> scan / return in MassCat/Koha, ComCat will update status in MassCat/Koha.

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Rev. 4/3/19 – Scott Kehoe, MLS