**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.*

>>> NEXT PAGE for NEXT STEPS >>>

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**ComCat Workflows MassCat**

[Image: ComCat logo] [Image: Workflows logo] [Image: MassCat logo]
SEARCHING & REQUESTING Workflow (for your 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)

   ![Select a Patron](image)

   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 same 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.

>>> NEXT PAGE for NEXT STEPS >>>
BORROWING Workflow *(Items for your 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*

   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 other 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.”**
    **DO NOT** scan / return in MassCat/Koha, ComCat will update status in MassCat/Koha.

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Rev. 4/3/19 – Scott Kehoe, MLS