

ComCat Training

For Koha libraries



Logging in

- How patron accounts are created
- ILL Staff login
- Admin login



Patron Accounts

- Patrons login with same credentials as OPAC
 - If their PIN changes, they need to login to ComCat to update their account
- 1st login : Account generated
 - The library they select during their first login will be permanently tied to their account and be used as their default pickup location.
 - Patrons can set a new default pickup location in their account settings.
 - New barcode, ComCat recognizes them as a separate patron

Please select your library  Make sure patrons select the correct library the first time.

Select your library:

HELM-HCC : HCC Library 

Username:

Password:

Remember Me? [Forgot Your Password](#)

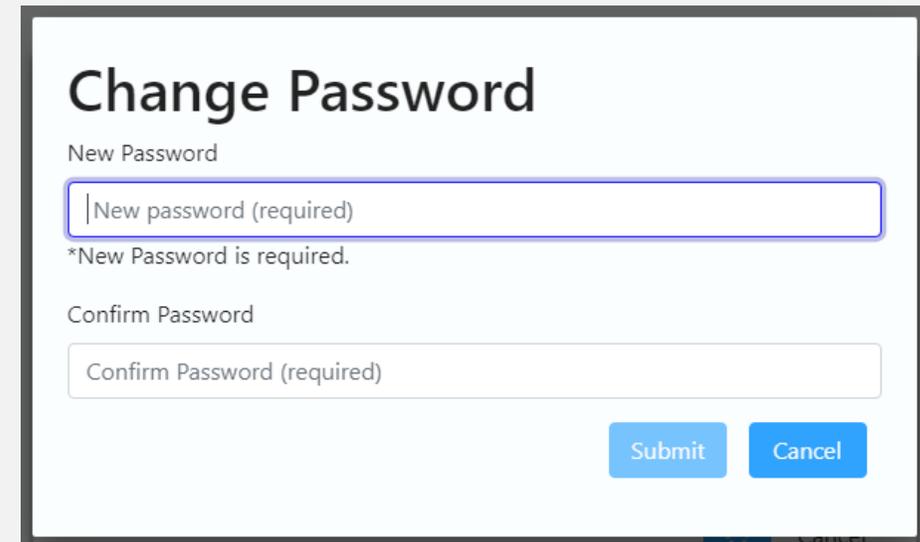
Staff logins

ILL Staff

- Permissions: ILL Admin, Statistics
- To activate your two logins, login with “ill staff” or “admin” using the password “**userpass.**” A screen will pop-up prompting you to set a new password.
- Usernames in ComCat are not case sensitive

Admin

- Permissions: ILL Admin, User Admin, Statistics



Change Password

New Password

*New Password is required.

Confirm Password

Submit Cancel

Searching ComCat

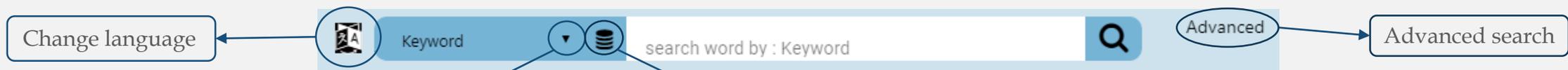
- ❑ Search functionality
- ❑ Search options



How Searching Works

- ComCat uses the Z39.50 protocol to search all resources (“Z-Targets”) selected.
- Search results are “live,” they will appear as they appear in the lender’s OPAC and ComCat can tell whether or not the item is available
- Different catalogs support different kinds of searching
 - For example, some don’t support Boolean AND/OR/NOT searches

Search Bar Anatomy



- Keyword
- Keyword**
- Title
- Author
- Subject
- ISBN
- LCCN
- Notes

Resources ✕

<input type="checkbox"/> Clear All	<input checked="" type="checkbox"/> Check All	<input checked="" type="checkbox"/> Set Default	<input checked="" type="checkbox"/> Compress All
<input checked="" type="checkbox"/> Bridgewater State University	<input checked="" type="checkbox"/> C/W MARS	<input checked="" type="checkbox"/> CLAMS	
<input checked="" type="checkbox"/> Fenway Libraries Organization	<input checked="" type="checkbox"/> HELM	<input checked="" type="checkbox"/> MassCat	
<input checked="" type="checkbox"/> Merrimack Valley Library Consortium	<input checked="" type="checkbox"/> Metro Boston Library Network	<input checked="" type="checkbox"/> Minuteman Library Network	
<input checked="" type="checkbox"/> NOBLE	<input checked="" type="checkbox"/> Old Colony Library Network	<input checked="" type="checkbox"/> SAILS Network	
<input checked="" type="checkbox"/> UMass Amherst	<input checked="" type="checkbox"/> UMass Dartmouth		

Search Results Screen

The screenshot shows a search results interface for the query "Moby Dick". On the left is a sidebar with filter categories: Subject, Author, Libraries, Date, Publisher, Title, Format, and Series. The Subject filter is expanded, showing options like Adventure Fiction (14), Ahab Captain... (32), American Literatur... (16), Electronic Books (12), Feature Films (13), Melville Herman... (67), Melville Herman... (17), Mentally Ill Fiction (17), and Psychological Fiction (15). The main content area displays "Page 1: 1403 total results for 'Moby Dick'" and a "Modify Search" button. Below this is a "Sort" dropdown and an "Additional Results Found" section containing "Add to Results" and "Ignore" buttons. At the bottom right are icons for "Gallery view" and "List view".

Annotations:

- Filter Search:** A blue arrow points from a dark blue box labeled "Filter Search" to the sidebar filter categories.
- To Advanced Search:** An orange box labeled "To Advanced Search" has an arrow pointing to the "Modify Search" button.
- Additional results load in the background to shorten load times. Button must be clicked to see these results.** An orange box with this text has an arrow pointing to the "Additional Results Found" section.
- Gallery view:** An orange box labeled "Gallery view" has an arrow pointing to the grid icon.
- List view:** An orange box labeled "List view" has an arrow pointing to the list icon.

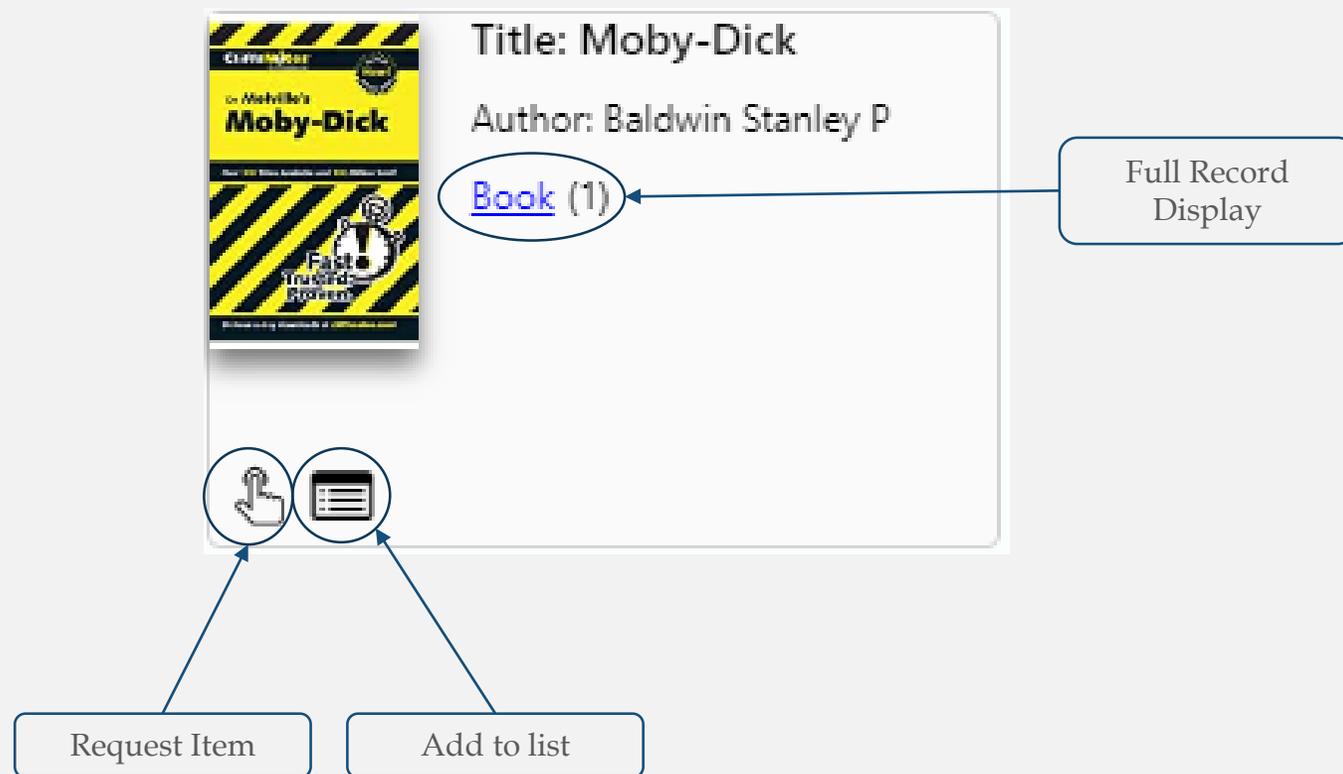
Search Results Clusters

- Search results are clustered by title. If two titles are almost the same but have different punctuation, they will be split into separate clusters.
- Titles with multiple formats or editions are grouped together. If a title only has one format/edition, there will be two action buttons below the title's cover art.

The screenshot displays six search result clusters for 'The Lord of the Rings' on a library website. Each cluster is enclosed in a white box with a thin border. The top-left cluster features a book cover of 'The Lord of the Rings: Weapons and Warfare' by Chris Smith, with a title highlighted in yellow and a 'Book (1)' link. The top-middle cluster shows a landscape image for 'The lord of the rings /' by J.R.R. Tolkien, with a title highlighted in yellow and links for 'Archival Materials (4)', 'AudioBook (1)', and 'Book (51)'. The top-right cluster has a 'Cover art not available' box and a title highlighted in yellow with a 'Book (2)' link. The bottom-left cluster shows a book cover of 'The Lord of the Rings J.R.R. Tolkien' with a title highlighted in yellow and a 'Book (1)' link. The bottom-middle cluster features a book cover of 'The Lord of the Rings: The art of The...' by Gary Russell, with a title highlighted in yellow and a 'Book (1)' link. The bottom-right cluster shows a book cover of 'The lord of the rings : the art of The fellowsh...' by Gary Russell, with a title highlighted in yellow and a 'Book (1)' link. Each cluster includes a thumbs-up icon and a list icon below the cover art.

Search Results – Scenario 1

- If there is only one format/edition of the item in the block, you can request the item from the results page.
- You can add items to customized lists
- Clicking cover art or format to go to *Full Record Display*



Search Results – Scenario 2

- If there are multiple formats/editions of the item in the block, you can only click on the cover art or format
- Clicking formats will either take you to the Brief or Full Record Display depending on the amount of items/editions in the cluster

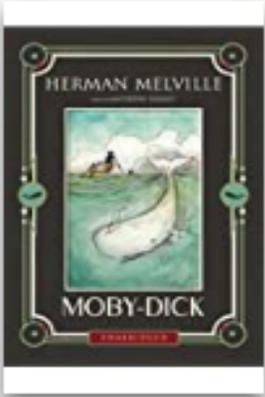


Title: Moby Dick

- [Book](#) (10)
- [DVD](#) (39)
- [eBook](#)
- [Film](#) (1)
- [Videocassette](#) (2)
- [Visual Materials](#) (9)

*No request button or list button

Brief Record Display



Title: Moby-Dick [sound recording] Herman Melville
Author: Melville Herman 1819-1891
Date: p2009
Publisher: Blackstone Audio

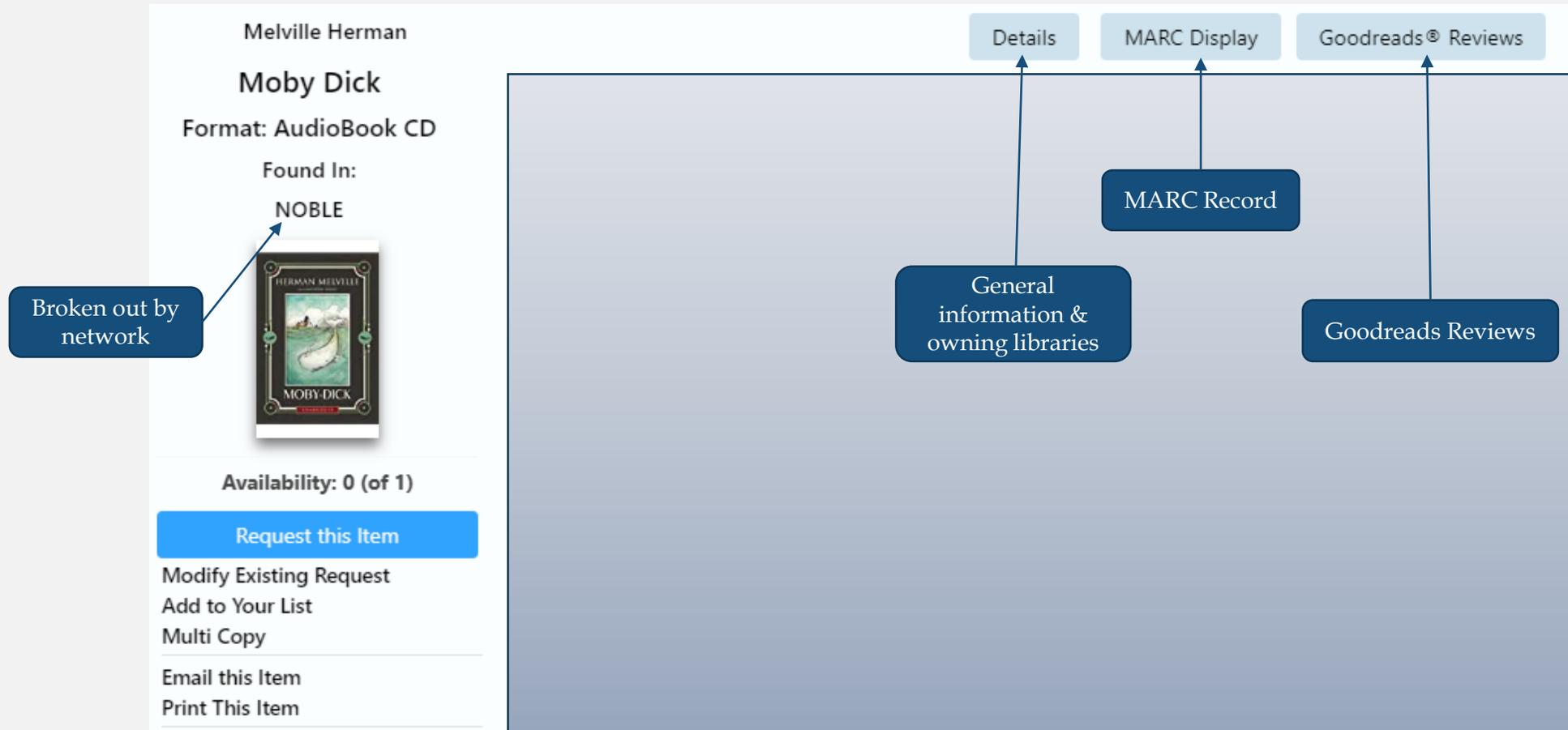
Format	Source	Request	List
AudioBook CD	C/W MARS		

Items broken out by format/edition

Network that owns the item

Click cover art or format to get to Full Record Display

Full Record Display



Requesting Items

- Requesting as a patron
- Requesting on behalf of a patron
- Network Handling



How Requesting Works

- When you request an item, ComCat builds a lender list using all possible copies of the item it can find. It doesn't matter where you initiate the request, ComCat will attempt to find all potential lenders of that item.

Etcetera : the unpublished poems / E.E. Cummings ; edited by George James Firmage and Richard S. Kennedy

Author: Cummings, E. E. (Edward Estlin), 1894-1962
Found in: UMass Dartmouth



[Details](#) [More About This Title](#) [MARC Display](#)

Details

Format : Book
System Nbr. : 9911150230001301
LCCN : 00039117
ISBN : 0871401762 (pbk.)
Author : Cummings, E. E. (Edward Estlin), 1894-1962.
Title : Etcetera : the unpublished poems / E.E. Cummings ; edited by George James Firmage and Richard S. Kennedy.
Publisher : Liveright.
Date : [2000]
Description : xvi, 272 p. ; 21 cm.
Notes : Revision of 1983 ed. including 36 additional poems.
Notes : "Together with Uncollected poems."
Notes : Includes bibliographical references.
Co-Author : Firmage, George James.
Co-Author : Kennedy, Richard S.

*** Lender List**

Location	ILL Lender?	Call Number	Status
Claire T. Carney Library - UMass Dartmouth (UMDART)	[ILL Lender]	CARNEY gen3 3rd Floor - General Collection PS3505.U334 A6 2000b	Available

MBLN-BPLSE, 4, Nonfiction PS3505 .U334A6 2000b, 646367
UMDART, 4, 3rd Floor - General Collection PS3505.U334 A6 2000b, 9911150230001301
HELM-MBW, 4, PS3505 .U334 A6 2000b, 298521
UMAMH, 4, PS3505.U334 A6 2000b, 003978731


 UMass Dartmouth Record

Request Form

Staff Request Form

Patron's First Name

Patron's Last Name *

Patron's Library Card Number

Patron Email or Phone *

Ship to Name *

Ship to Address 1 *

The major difference between the forms is the note's field.

A Borrower's Note will be viewable by the Lender, a Patron's Note will not.



Patron Request Form

Pickup Location Options

Patron's First Name

Patron's Last Name *

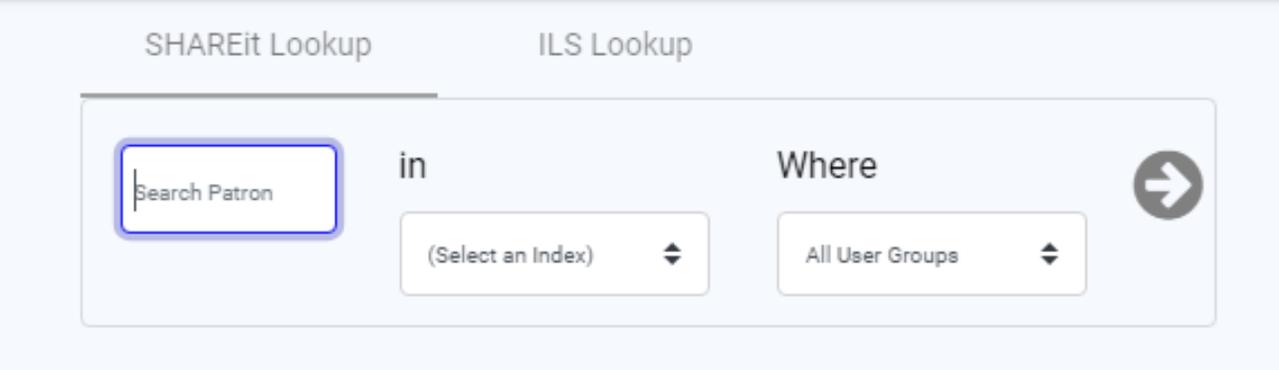
Library Card Number

Patron Email or Phone *

Material Type

Staff Privileges when Requesting

- Override capabilities
 - Duplicate requests
 - Pass to Local System
- Borrower's Notes
- No need for a PIN (if using SHAREit Lookup)
- One login for managing and placing requests



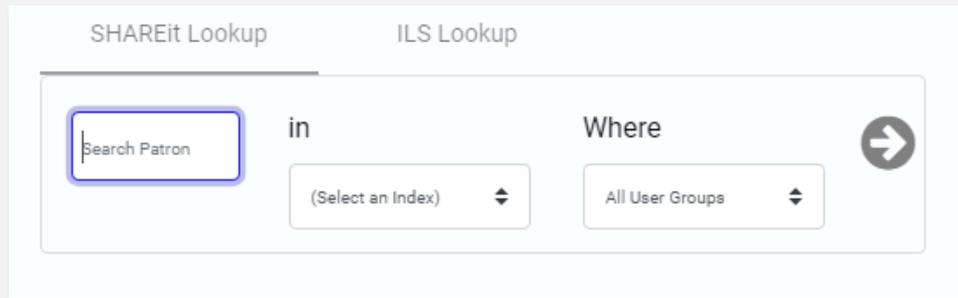
The screenshot displays the 'SHAREit Lookup' interface. At the top, there are two tabs: 'SHAREit Lookup' (selected) and 'ILS Lookup'. Below the tabs is a search form with the following elements:

- A search input field containing the text 'Search Patron'.
- The word 'in' positioned between the search field and the index dropdown.
- A dropdown menu for selecting an index, currently showing '(Select an Index)'.
- The word 'Where' positioned above the user group dropdown.
- A dropdown menu for selecting user groups, currently showing 'All User Groups'.
- A circular button with a right-pointing arrow on the far right of the form.

SHAREit Lookup vs. ILS Lookup

SHAREit Lookup

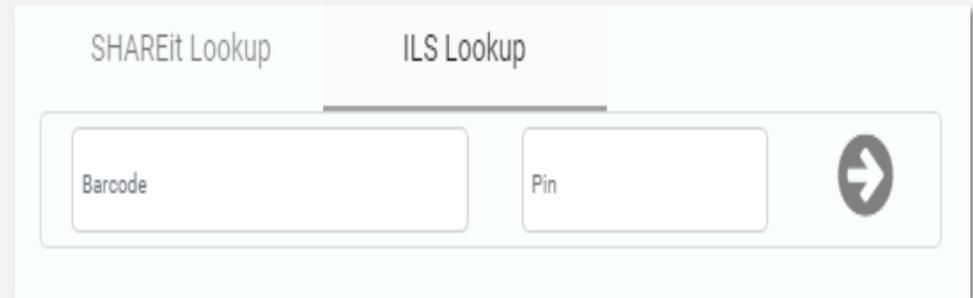
- Used for patrons that have logged into ComCat at least once. Flexible search options.



The screenshot shows the SHAREit Lookup interface. It features two tabs: "SHAREit Lookup" (selected) and "ILS Lookup". Below the tabs is a search form with a text input field labeled "Search Patron" (highlighted with a blue border), a dropdown menu labeled "in" with the text "(Select an Index)", and another dropdown menu labeled "Where" with the text "All User Groups". A search button with a right-pointing arrow is located to the right of the form.

ILS Lookup

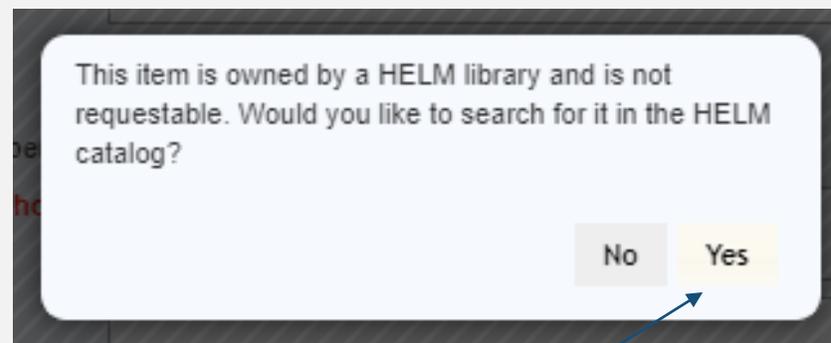
- Used for patrons that have never logged into ComCat. Requires patron's PIN.



The screenshot shows the ILS Lookup interface. It features two tabs: "SHAREit Lookup" and "ILS Lookup" (selected). Below the tabs is a search form with two input fields: "Barcode" and "Pin". A search button with a right-pointing arrow is located to the right of the form.

Network Handling

- If an item is owned by the patron's local network, ComCat will suggest they place the request from their local OPAC
- Exception: If their local network owns the item but all copies are checked out, ComCat will allow the request to go through



Clicking "Yes" will pass you to the item in your local OPAC

Managing Requests

- ILL Admin
- Borrowing Requests
- Lending Requests



ILL Admin – Access Requests

ILL Admin > Request Manager

Manage Borrower Requests		Manage Lender Requests	
Action items		Action items	
Status	Count	Status	Count
Awaiting Approval	3	Pending	0
Not Received	1	Will Supply/In Process	0
Not-Received/Overdue	0	Renew/Overdue	0
Accepted Renewal	0	Pending Cancel	0
Recalled	0	Renew Pending	0
Unfilled	0	Returned	10
Shipped	0		
Complete	0		
Conditional	0		
Received	1		
Rejected Renewal	0		
Overdue	1		

ILL Admin > Borrower > Title Browse

BORROWER'S TITLE BROWSE

Request(s) marked as will be deleted overnight

Page: 1 | 1 - 18 / 18 (18) | 250

Title	Req. No.	Library	Author Name	Patron Name	Status
Academic libraries for commuter students : research-based strategies.	491008	CW-AIC (AIC Shea Library)			Returned
American libraries 1730-1950	520945	UMDART (UMass Dartmouth)	Breisch, Kenneth A.		Returned
American loser.	506813	MVLC-LOWELL (Lowell (Pollard Memorial Library))			Returned
The Biafra story.	497239	MLN-PMC (Pine Manor / Annenberg)	Forsyth, Frederick,		Returned

Broken up by status and library role

ILL Admin > Borrower > Global Request Search

BORROWER'S GLOBAL REQUEST NUMBER SEARCH

Request Number:

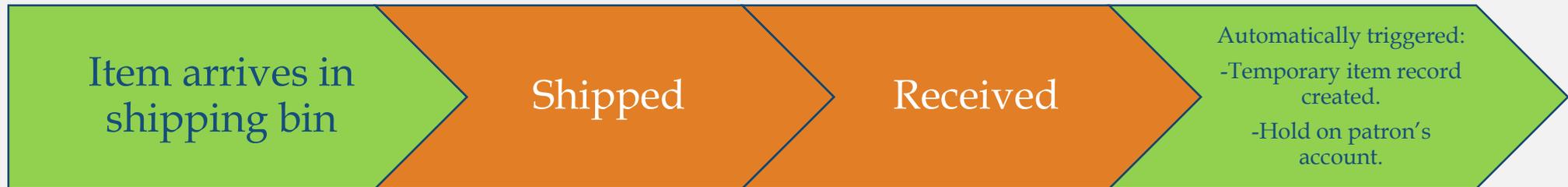
Submit Reset Help

Search for specific request

Broken up by library role

Borrowing Requests

1



2



ComCat
Statuses

ILS/Staff
Steps

Awaiting Approval

- If a patron places a request and leaves a note for staff, the request will go into “Awaiting Approval”
 - If you want the lender to see this note, copy and paste it into “Borrower’s Notes”
- A request in this status will sit there indefinitely until you mark it “Approve-send”
- Other causes of Awaiting Approval:
 - Guest Requests (not allowed by policy)
 - Permissions

Lending Requests

1



2



ComCat
Statuses

ILS/Staff
Steps

Picklist (for pending lending requests)

ILL Admin > Request Manager

LENDER'S PENDING LIST

Print All: [With Lenders](#) [Without Lenders](#) [New Requests](#) [New Requests with History](#) [Pick List](#) [Submit](#) [Reset](#) [Close](#) [Help](#)

For Shipped Option for Returnable requests, click on a title to navigate to the Full Record Display.

CAUTION: This will update ALL requests with this status. Not just the requests on this page

Pending

Page: 1 | 1 - 14 / 14 (14) | 25

Title	Req. No.	Pub Date	Borrower	Status	Reason/Condition
Who murdered who? : A mystery-comedy in one act	547692	c1941.	CLAMS-VINEYARD (Vineyard Haven Public Library)	Pending	
Wilfred. The complete season 4	547672	[2015]	CW-LEE (Lee Library Association)	Pending	

Printable Format

Lender's ILL Pick List on [Monday, June 10, 2019] - Google Chrome

https://commonwealthcatalog.org/ILLAdmin/PrnLender.asp?myses=7584063&cuid=massvc&c...

Lender's ILL Pick List: [Monday, June 10, 2019]

Title: Amato a love affair with opera [videorecording]; **Publisher:** Distributed by PBS Home Video; **Publication Date:** c2007.; **Call number:** DVD. DVD ML1711.8 .N49 A FULLSCRN

Title: Appearances; **Author:** Helene, Sondra.; **Publisher:** She Writes Press; **Publication Date:** 2019.; **Call number:** Fiction FICTION New Shelf HELENE S

Title: Cinema without reflection : Jacques Derrida's echopoiesis and narcissism adrift; **Author:** Lippit, Akira Mizuta; **Publisher:** University of Minnesota Press; **Publication Date:** [2016]; **Call number:** Nonfiction PN1995 .L57 2016x

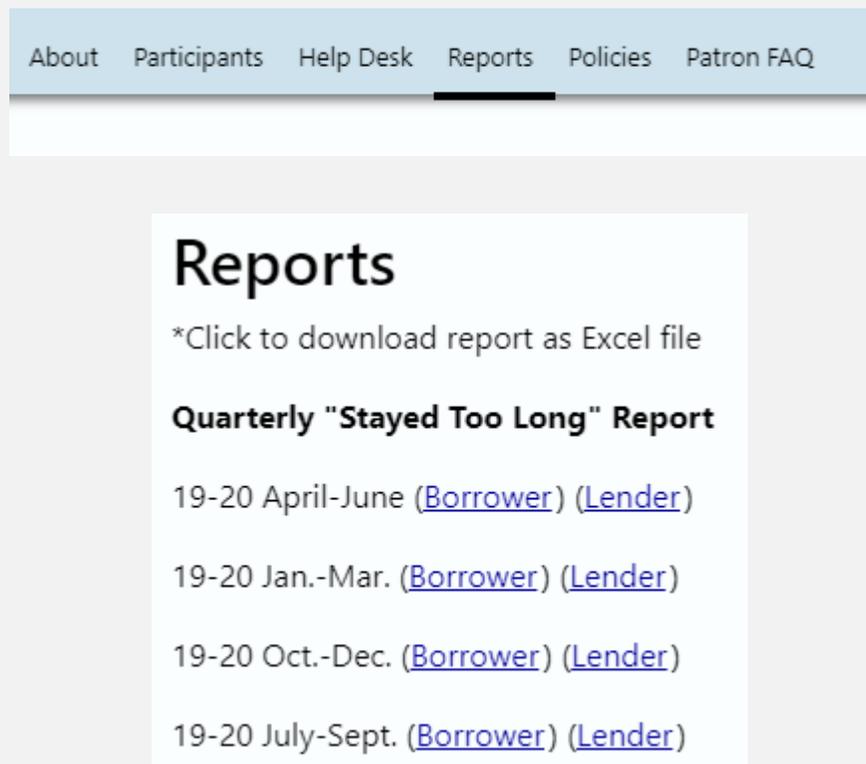
Statistics

- ❑ “Stayed Too Long” Report
- ❑ Year to Date Statistics
- ❑ Activity Reports



How to Find Reports

- Log in as staff and click on the “Reports” tab. When in the “Reports” tab, available reports are listed in the left-hand column.
- Click on the name of the report to download it as an Excel spreadsheet.
- Reports are also available via [Google Drive folder](#)



The screenshot shows a navigation menu at the top with the following items: About, Participants, Help Desk, Reports, Policies, and Patron FAQ. The 'Reports' tab is highlighted with a black underline. Below the navigation menu, the main content area displays the heading 'Reports' in a large, bold font. Underneath the heading, there is a note: '*Click to download report as Excel file'. The main content area lists four reports under the heading 'Quarterly "Stayed Too Long" Report':

- 19-20 April-June ([Borrower](#)) ([Lender](#))
- 19-20 Jan.-Mar. ([Borrower](#)) ([Lender](#))
- 19-20 Oct.-Dec. ([Borrower](#)) ([Lender](#))
- 19-20 July-Sept. ([Borrower](#)) ([Lender](#))

Reports Provided by FLO

- “Stayed Too Long” Report
 - Updated quarterly
 - Shows all requests that have been idle for more than 30 days
 - Helps you keep track of lost items or requests that need to be deleted
- Year to Date Statistics Report
 - Updated monthly – Includes a cumulative annual tab
 - Number of borrowing requests and lending requests by month
 - By library and by network
- Activity Reports
 - Updated monthly
 - Itemized “snapshot” of active requests and their current status

ComCat Support



ComCat Helpdesk

The screenshot shows the Commonwealth Catalog website's helpdesk interface. At the top left is the logo for Commonwealth Catalog with the tagline "ONE SEARCH. ALL STACKS." Below the logo is a navigation bar with "Home" and "Submit a Ticket" (highlighted in orange). The breadcrumb trail reads "FLO / FLO Helpdesk / ComCat". The main heading is "ComCat Helpdesk". Below this is a search section with "31 Solutions" on the left, a search input field with the placeholder "Type your question", a "Search" button, and a "Browse:" section with dropdown menus for "All", "Groups", and "Topics". On the left side, there is a "FAQs By Topic" section with tabs for "Patron Accounts", "Lost Items", "Processing Requests", "Problems Requesting", and "Getting Started". The "Patron Accounts" tab is active, showing a FAQ entry titled "When a patron hits the request limit." with a "Last Updated" date of Dec 10, 2019, "Topics" of Patron Accounts, and "Views" of 40. On the right side, there is a "Contact Us" section with a "Submit a Ticket" button and a phone icon next to the number "617-989-5032".

- Use helpdesk page in ComCat or go to:
<https://flo.libanswers.com/comcat>
- You can also email:
comcat@flo.libanswers.com to submit a ticket
- Submitting a ticket is the best way to get support (paper trail).
- Our “Knowledge base” and “ComCat Quick Guides” might answer your question

Advanced Topics

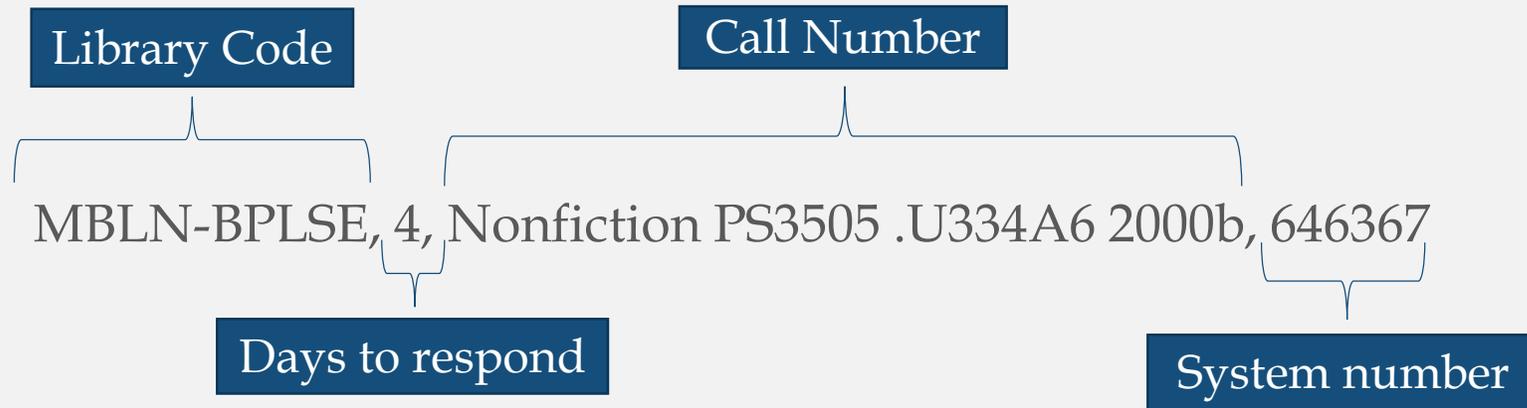


Request Full Record Display

- Lender List
- Contacting Request Partners
- History Information



Lender List



* Lender List
MBLN-BPLSE, 4, Nonfiction PS3505 .U334A6 2000b, 646367
UMDART, 4, 3rd Floor - General Collection PS3505.U334 A6 2000b, 9911150230001301
HELM-MBW, 4, PS3505 .U334 A6 2000b, 298521
UMAMH, 4, PS3505.U334 A6 2000b, 003978731

Contacting Request Partners

ILL Admin

[Request Manager](#)

Borrower

[Title Browse](#)

[Request Number Search](#)

[Patron Browse](#)

Lender

[Title Browse](#)

[Request Number Search](#)

[Maintain Participant Record](#)

[Blank Request Form](#)

[ALA Form](#)

[Maintain Shipping Labels](#)

[Maintain Bookstraps](#)

[Search Library Information](#)

[ILL Request Limits](#)

[Set Workstation Printer](#)

[User Guides](#)

If you have no open request

If you have an open request

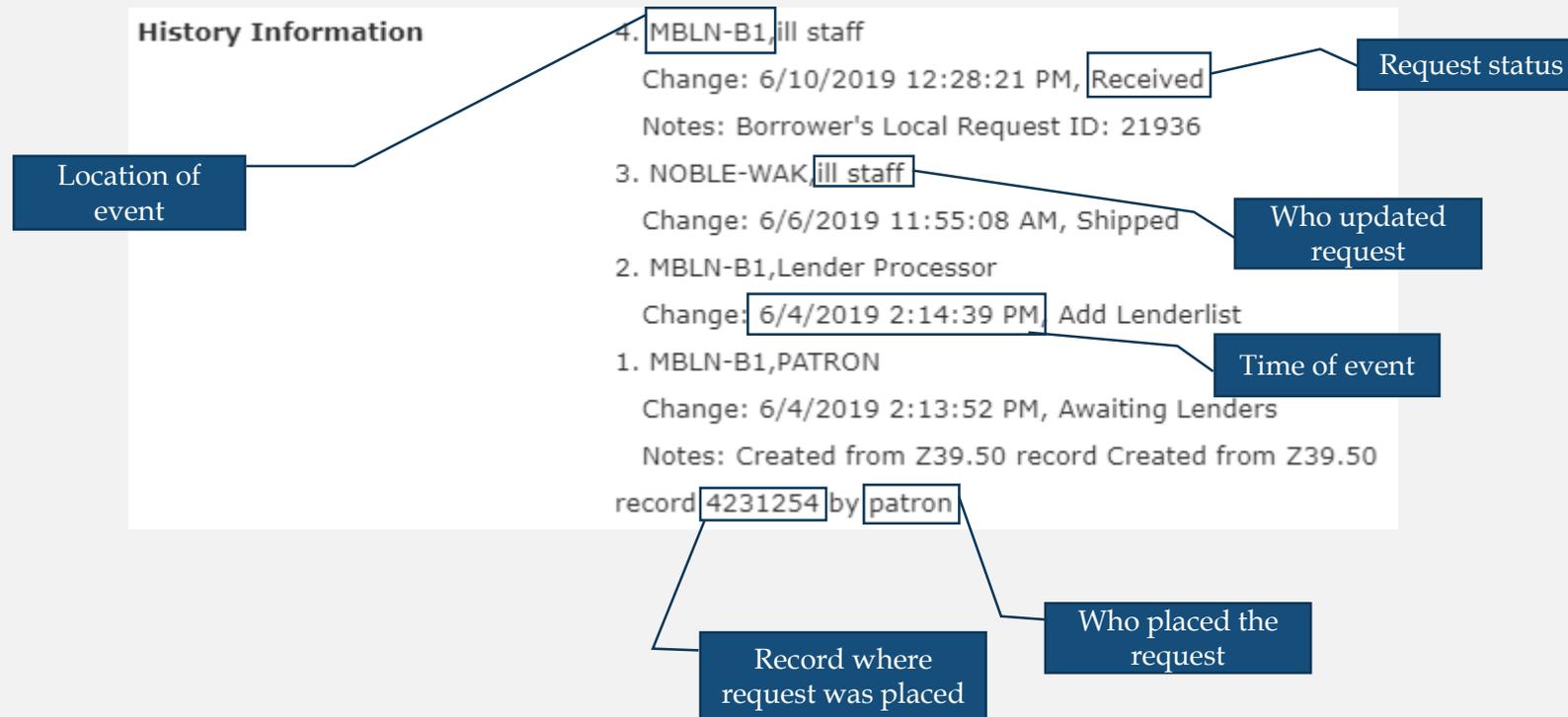
LENDER'S FULL RECORD DISPLAY

Submit Reset Close Help

Format to Print Go Back

Request Number	547764
Request Date	6/10/2019
Request Type	Returnable (loan)
Material Type	Book
Status Options	Pending
Reason/Condition Options	
Author/Creator	Helene, Sondra.
Title	Appearances
Any Edition is Acceptable	no
Publisher (Place, Name, Date)	Berkeley, California, She Writes Press, 2019.
Physical Description	313 pages ; 22 cm
ISBN	9781631524998, 1631524992
Item Barcode (Lender)	
Material Format Options	None of the below
Call Number and Location	Fiction FICTION New Shelf HELENE S
Pickup Location	CLAMS-EFALMOUTH (East Falmouth Branch Library)
Borrower's Email	efal_mail@clamsnet.org
Borrower's Phone	508-548-6340

History Information

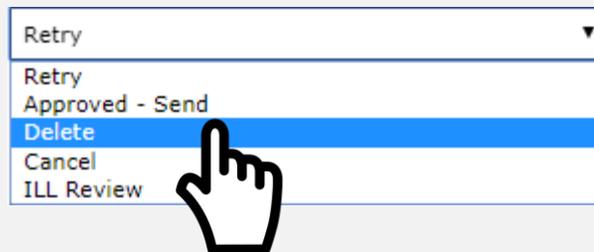


Important Policies



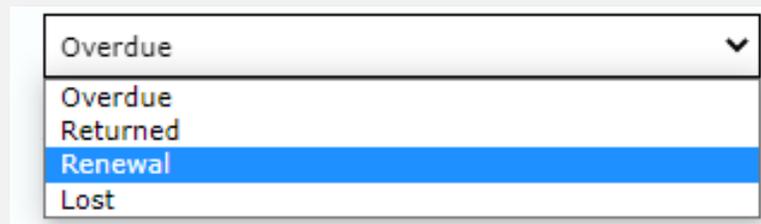
Managing Patrons' Requests

- ❑ Patrons are allowed a maximum of 10 active requests
 - ❑ **Statuses that count as “Active”:** Accepted Renewal, Awaiting Approval, Cancel Shipped Request, Cancelled, Expired, ILL Review, Not Received, Overdue, Pending, Pending Cancel, Recalled, Received, Rejected Renewal, Renew Pending, Shipped, Will Supply/In Process, Conditional
- ❑ Requests shouldn't be left sitting around for too long because they will count toward this total and the patrons may be blocked from requesting items.
 - ❑ Clear out requests routinely by updating their status to “Delete”



Loan Period & Renewals

- The ComCat loan period is 56 days. This loan period is set up in the loan rules of the lending library's ILS and is used to calculate the due date in ComCat. 56 days accounts for travel time:
 - 14 days to arrive at borrowing library
 - 28 days checked out to the patron
 - 14 days to return to the lending library
- Renewals are not allowed by policy. The option to renew a request is visible in ComCat but when selected, the renewal will automatically be rejected. Renewals are blocked by the lender's system.



Lost Items & Billing

- If a ComCat item is overdue, fines are set, collected and kept by the borrowing library. No overdue fines should be collected by the lending library
- If an item is lost by the patron or lost in transit, the borrowing library is responsible for reimbursing the lending library.
 - If the item is lost in transit, the Optima delivery system may pay the claim in place of the Borrowing Library in some cases.
- ComCat has no billing functionality, all billing will either take place outside of the system between the lending and borrowing library or between the borrowing library and the patron.

Miscellaneous Topics



Retry vs. Unfilled

Retry

- Lenders added back to lender list for later. (Potential future lenders).
- Explanations:
 - Lender's copy was checked out
 - Lender missed response deadline

Unfilled

- Lenders removed from lender list. (No potential for future lending).
- Explanations:
 - No lenders available
 - Item not available (and won't be available until further notice)
 - Library is temporarily closed

Retry vs. Unfilled

When choosing not to lend an item, you can select a reason that will determine whether or not you'll be considered as a lender in the future.

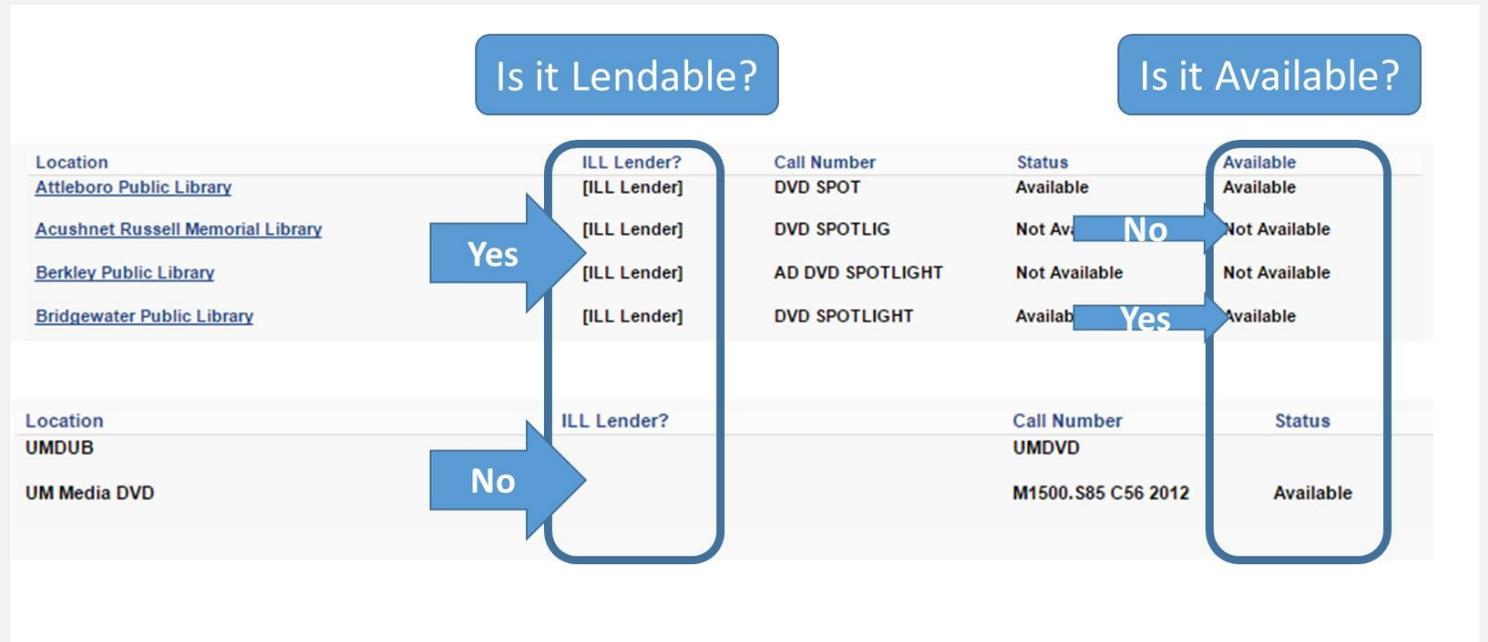
Book	▼
Will not Supply	▼
Omit Reason [Unfilled].	▼
Omit Reason [Unfilled].	▲
At bindery [Retry].	
Charges [Retry].	
Cost exceeds limit [Retry].	
Expiry not supported [Retry].	
In process [Retry].	
In use, on loan [Retry].	
Lacking [Unfilled].	
Lacks copyright compliance [Retry].	
Locations not found [Unfilled].	
Lost [Unfilled].	
Mandatory messaging not supported [Retry].	
Non-circulating [Unfilled].	
Not found as cited [Unfilled].	
Not on shelf [Retry].	
Not owned [Unfilled].	
On hold [Retry].	
On order [Retry].	
On reserve [Retry].	
Other [Unfilled].	▼

Item in use but will return
= Retry

Item is lost and will not return
= Unfilled

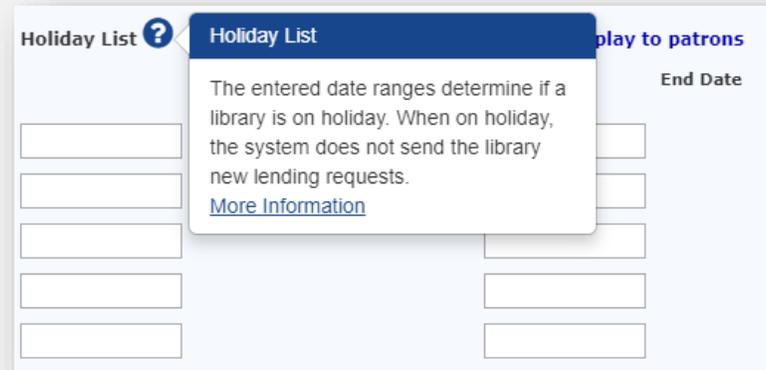
Determining Availability

- Availability – Is an item checked out?
- Lendability – Is the item available for ILL lending?
 - Whether or not an item is considered lendable is determined in the Z-Map (a table managed by FLO).



The Participant Record

- Only the FLO Staff has access to edit Participant Records
 - Staff have read-only permissions
 - If you'd like to make a change, submit a ticket to FLO
- Areas of interest:
 - Contact Info
 - Holiday List
 - Patron Notices
 - Staff Notices

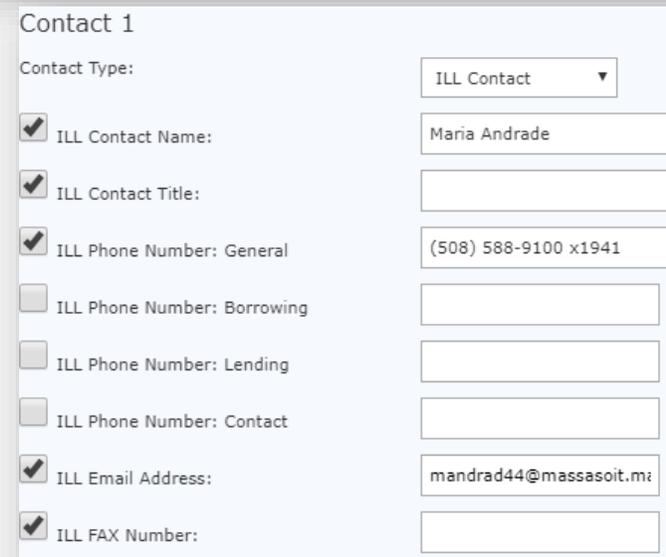


The screenshot shows a web form titled "Holiday List" with a help icon. A tooltip is displayed over the form, explaining that the entered date ranges determine if a library is on holiday, and that during holidays, the system does not send new lending requests. A link for "More Information" is provided. The form includes several input fields for dates and a "play to patrons" button.

Holiday List ? **Holiday List** **play to patrons**

The entered date ranges determine if a library is on holiday. When on holiday, the system does not send the library new lending requests. [More Information](#)

End Date



The screenshot shows a web form titled "Contact 1". It includes a "Contact Type" dropdown menu set to "ILL Contact". Below this are several fields with checkboxes: "ILL Contact Name" (checked, value: Maria Andrade), "ILL Contact Title" (checked, empty), "ILL Phone Number: General" (checked, value: (508) 588-9100 x1941), "ILL Phone Number: Borrowing" (unchecked, empty), "ILL Phone Number: Lending" (unchecked, empty), "ILL Phone Number: Contact" (unchecked, empty), "ILL Email Address" (checked, value: mandrad44@massasoit.m), and "ILL FAX Number" (checked, empty).

Contact 1

Contact Type: ILL Contact

ILL Contact Name: Maria Andrade

ILL Contact Title:

ILL Phone Number: General: (508) 588-9100 x1941

ILL Phone Number: Borrowing:

ILL Phone Number: Lending:

ILL Phone Number: Contact:

ILL Email Address: mandrad44@massasoit.m

ILL FAX Number:

Questions?

