

# ComCat Training

For Koha libraries



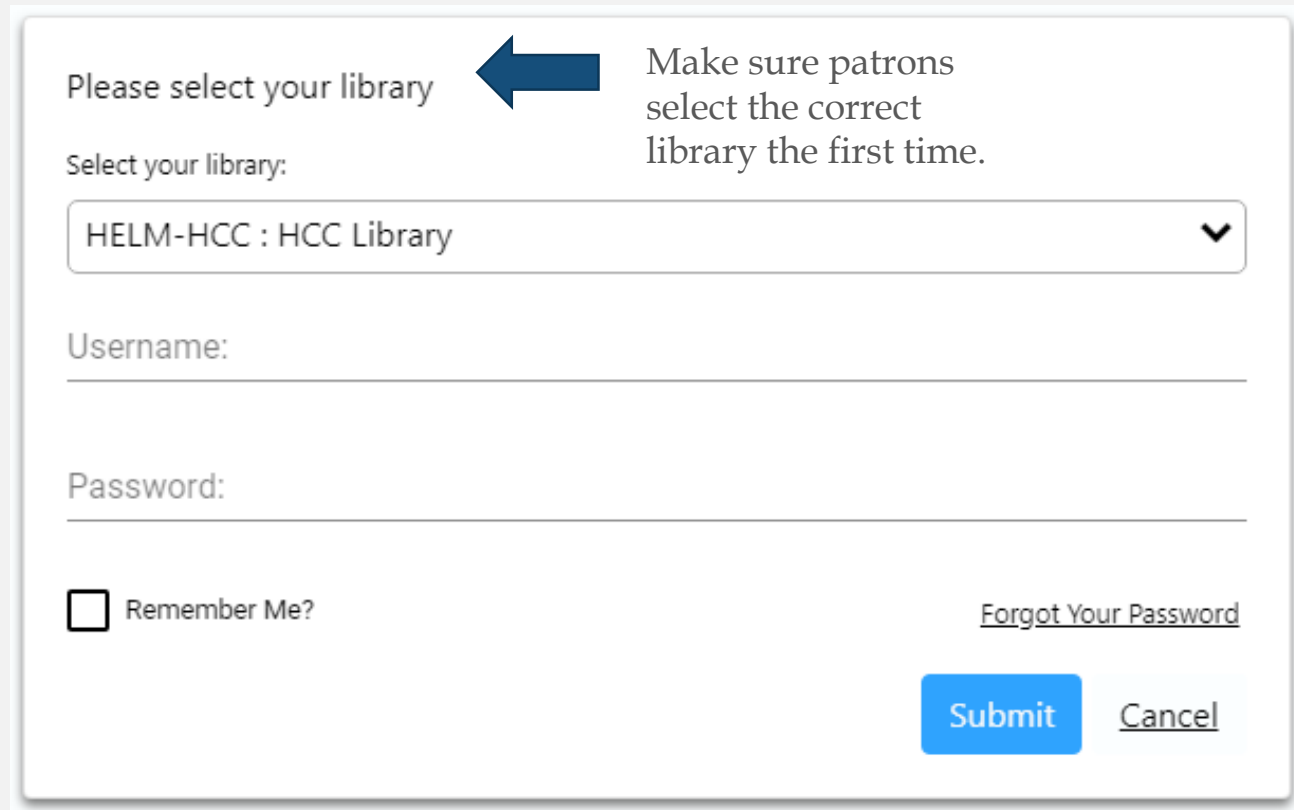
# Logging in

- ☐ 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
- 1<sup>st</sup> 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



The screenshot shows a login form with the following elements:

- Please select your library**: A text label with a blue arrow pointing to the library selection dropdown.
- Select your library:**: A label for the dropdown menu.
- HELM-HCC : HCC Library**: The selected library name in the dropdown menu, with a downward arrow icon on the right.
- Username:**: A text input field.
- Password:**: A text input field.
- ☐ **Remember Me?**: A checkbox and label.
- [Forgot Your Password](#): A link to reset the password.
- Submit**: A blue button.
- Cancel**: A light blue button.

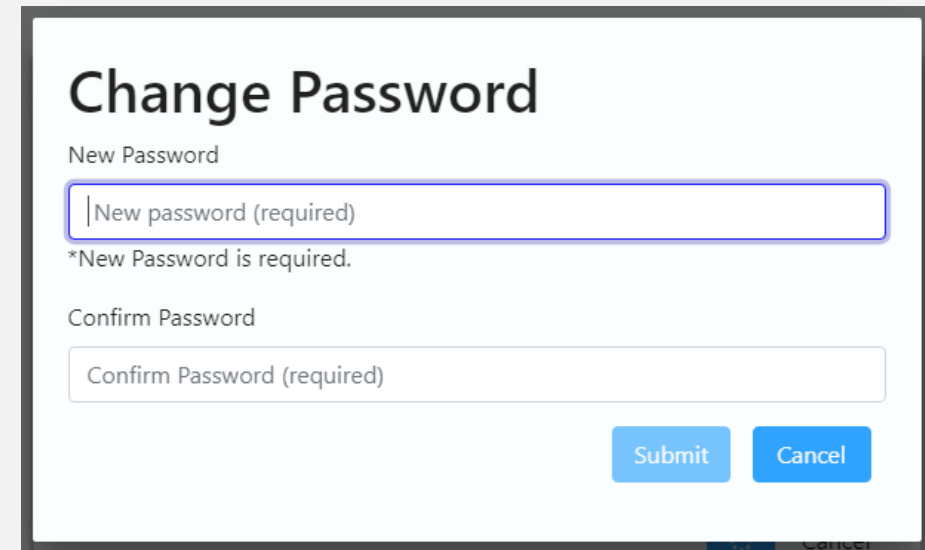
# Staff logins

## 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



The screenshot shows a 'Change Password' form with the following elements:

- Change Password** (Section Header)
- New Password** (Label)
- (Text Input)
- \*New Password is required. (Error Message)
- Confirm Password** (Label)
- (Text Input)
- (Submit Button)
- (Cancel Button)

# 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

The diagram illustrates the components of a search bar and the resulting search results. The search bar at the top includes a language icon, a dropdown menu, a search input field, a search button, and an advanced search link. The dropdown menu is open, showing various search criteria. The search results are displayed in a table with columns for search criteria, a list of resources, and a list of checkboxes for each resource.

Change language

Keyword

search word by : Keyword

Advanced

Advanced search

Keyword

Keyword

Title

Author

Subject

ISBN

LCCN

Notes

### Resources

☐ Clear All

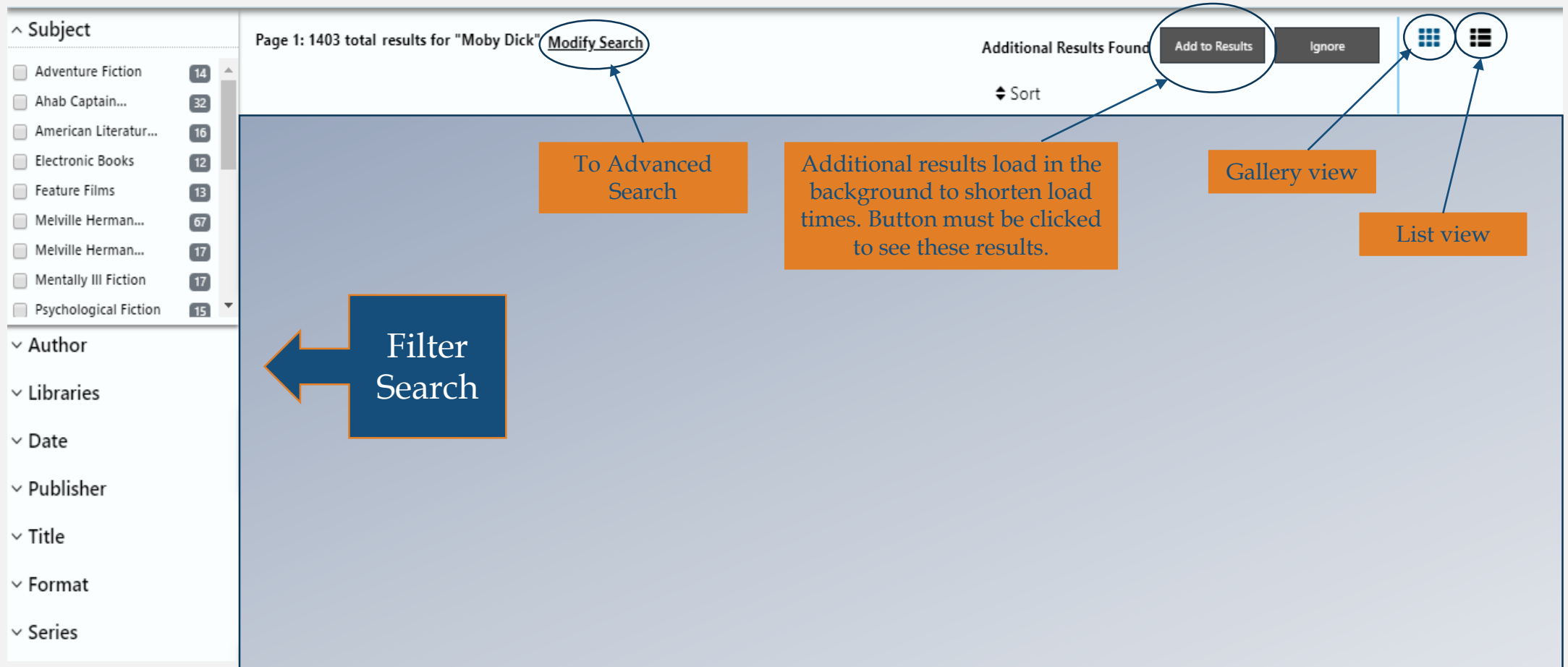
☒ Check All

☒ Set Default

☒ Compress All

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


















# Search Results Screen





# 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.

 <p>Title: <b>The Lord of the Rings : weapons and...</b> Author: Smith, Chris. <a href="#">Book</a> (1)</p>  	 <p>Title: <b>The lord of the rings /</b> Author: Tolkien, J. R. R. 1892-... <a href="#">Archival Materials</a> (4) <a href="#">AudioBook</a> (1) <a href="#">Book</a> (51)</p>  	<div>Cover art not available</div> <p>Title: <b>The lord of the rings.</b> Author: Tolkien, J. R. R. 1892-... <a href="#">Book</a> (2)</p>  
 <p>Title: <b>The Lord of the Rings J.R.R. Tolkien</b> <a href="#">Book</a> (1)</p>  	 <p>Title: <b>The Lord of the Rings. The art of The...</b> Author: Russell, Gary. <a href="#">Book</a> (1)</p>  	 <p>Title: <b>The lord of the rings : the art of The fellowsh...</b> Author: Russell, Gary. <a href="#">Book</a> (1)</p>  

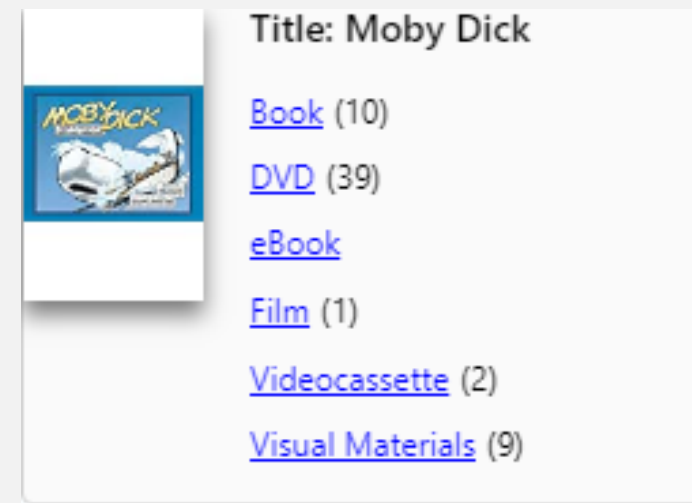
# Search Results – Scenario 1

- 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*



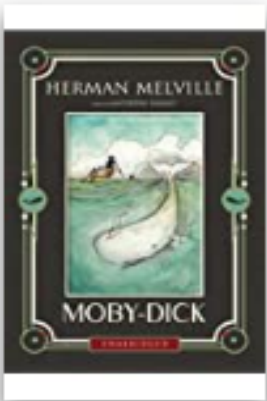
# Search Results – Scenario 2

- 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





\*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

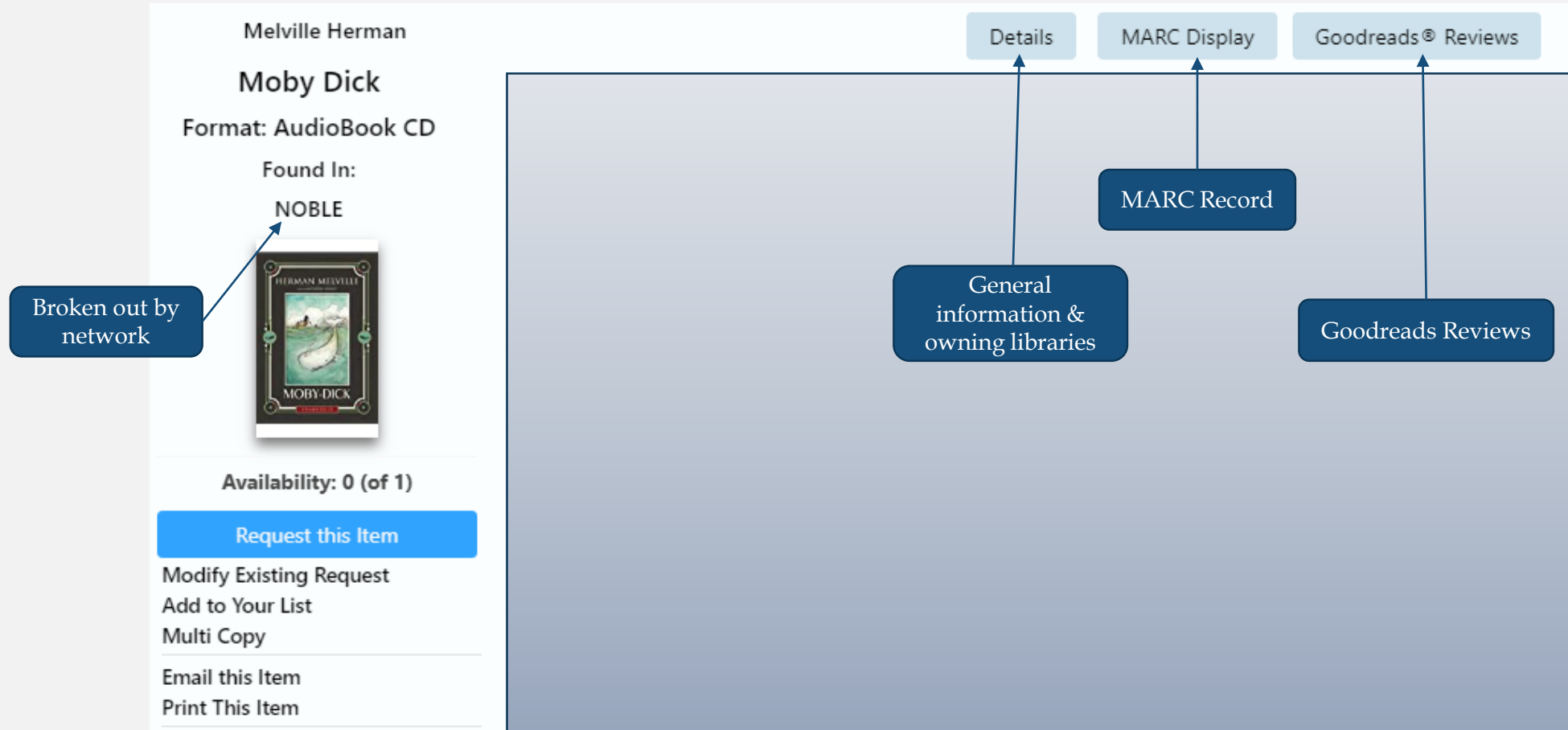
Format	Source	Request	List
<a href="#">AudioBook CD</a>	C/W MARS		

Click cover art or  
format to get to *Full  
Record Display*

Network that owns  
the item

Items broken out  
by format/edition

# 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](#)

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**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.

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

**\* 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

UMass Dartmouth Record

# Request Form

## Staff Request Form

Patron's First Name	<input type="text"/>
Patron's Last Name *	<input type="text"/>
	<input type="button" value="Patron Lookup"/>
Patron's Library Card Number	<input type="text"/>
Patron Email or Phone *	<input type="text"/>
Borrower's Notes	<input type="text"/>
Ship to Name *	<input type="text" value="Commonwealth Catalog"/>
	<input type="button" value="Submit"/> <input type="button" value="Cancel"/>
Ship to Address 1 *	<input type="text" value="550 Huntington Avenue"/>

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.



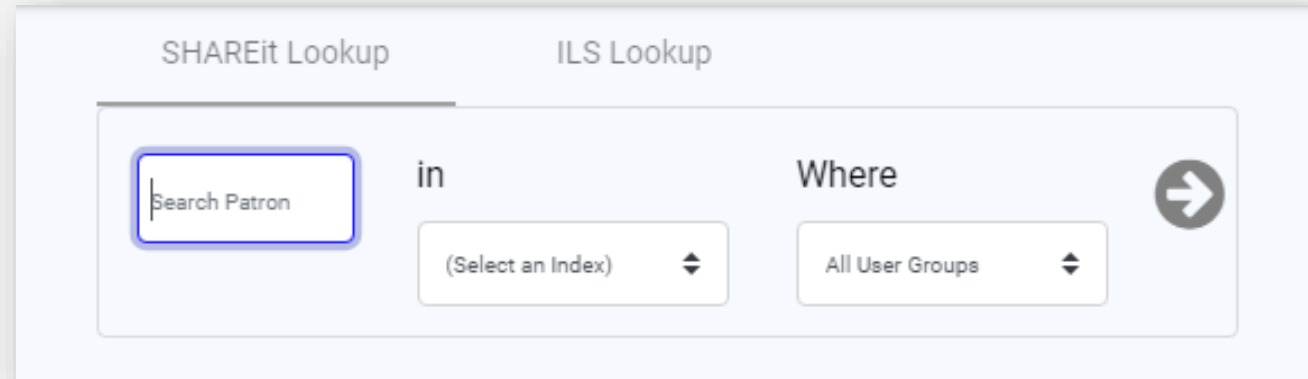
## Patron Request Form

Pickup Location Options	<input type="text" value="FLO-WENTWORTH Wentworth Institute of Technology"/>
Patron's First Name	<input type="text" value="Eliana"/>
Patron's Last Name *	<input type="text" value="Lima"/>
Library Card Number	<input type="text" value="ELIMA"/>
Patron Email or Phone *	<input type="text" value="limae@wit.edu"/>
Notes	<input type="text"/>
Material Type	<input type="text" value="Book"/>



# 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

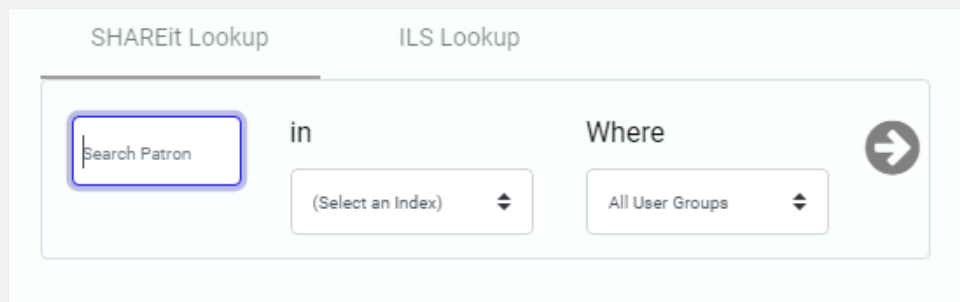


The screenshot displays the 'SHAREit Lookup' interface. At the top, there are two tabs: 'SHAREit Lookup' and 'ILS Lookup'. Below the tabs, there is a search form. On the left, there is a text input field labeled 'Search Patron' with a blue border. To its right is the word 'in'. Further right is a dropdown menu with the text '(Select an Index)' and a double-headed arrow icon. To the right of that is another dropdown menu labeled 'Where' with the text 'All User Groups' and a double-headed arrow icon. On the far right of the form is a circular button with a right-pointing arrow.

# SHAREit Lookup vs. ILS Lookup

## SHAREit Lookup

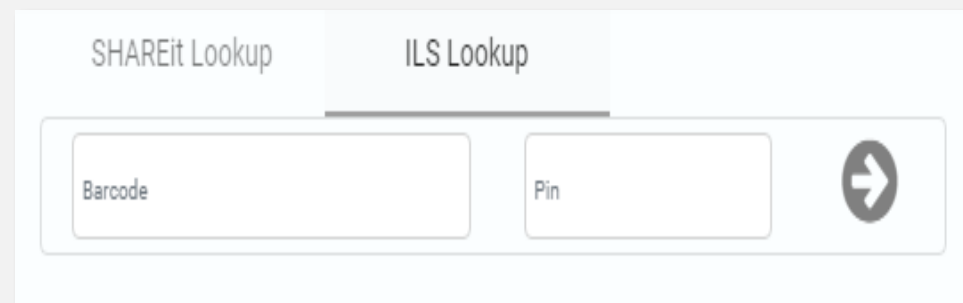
- Used for patrons that have logged into ComCat at least once. Flexible search options.



The SHAREit Lookup form is shown with two tabs: 'SHAREit Lookup' (active) and 'ILS Lookup'. The form contains a text input field labeled 'Search Patron' with a blue border, followed by the word 'in', a dropdown menu labeled '(Select an Index)', the word 'Where', a dropdown menu labeled 'All User Groups', and a right-pointing arrow button.

## ILS Lookup

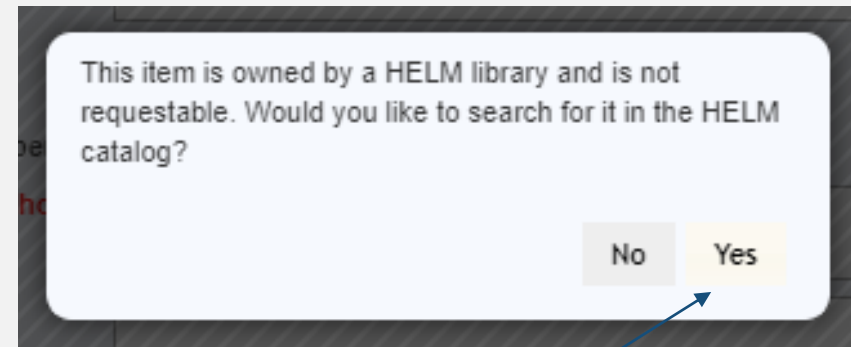
- Used for patrons that have never logged into ComCat. Requires patron's PIN.



The ILS Lookup form is shown with two tabs: 'SHAREit Lookup' and 'ILS Lookup' (active). The form contains a text input field labeled 'Barcode', a text input field labeled 'Pin', and a right-pointing arrow button.

# 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
<a href="#">Awaiting Approval</a>	3	Pending	0
<a href="#">Not Received</a>	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	<a href="#">Returned</a>	10
Shipped	0		
Complete	0		
Conditional	0		
<a href="#">Received</a>	1		
Rejected Renewal	0		
<a href="#">Overdue</a>	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
<a href="#">Academic libraries for commuter students : research-based strategies.</a>	491008	CW-AIC (AIC Shea Library)			Returned
<a href="#">American libraries 1730-1950.</a>	520945	UMDART (UMass Dartmouth)	Breisch, Kenneth A.		Returned
<a href="#">American loser.</a>	506813	MVLC-LOWELL (Lowell (Pollard Memorial Library))			Returned
<a href="#">The Biafra story.</a>	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:

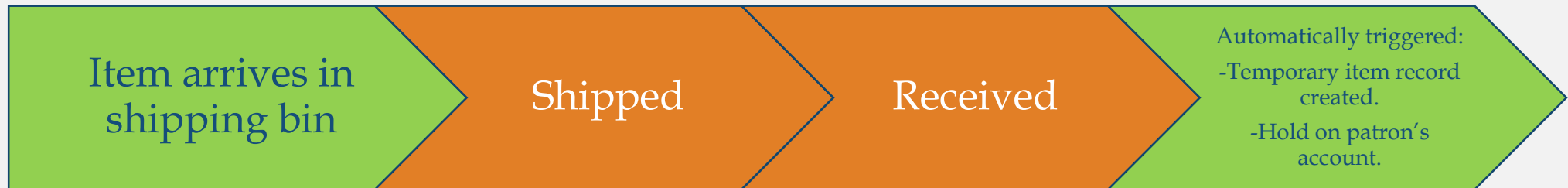
Submit Reset Help

Search for specific request

Broken up by library role

# Borrowing Requests

1



2



ComCat  
Statuses

ILS/Staff  
Steps

# Awaiting Approval

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- 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](#) [Submit](#) [Reset](#) [Close](#) [Help](#) [Pick List](#)

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
<a href="#">Who murdered who? : A mystery-comedy in one act</a>	547692	c1941.	CLAMS-VINEYARD (Vineyard Haven Public Library)	Pending	
<a href="#">Wilfred. The complete season 4</a>	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

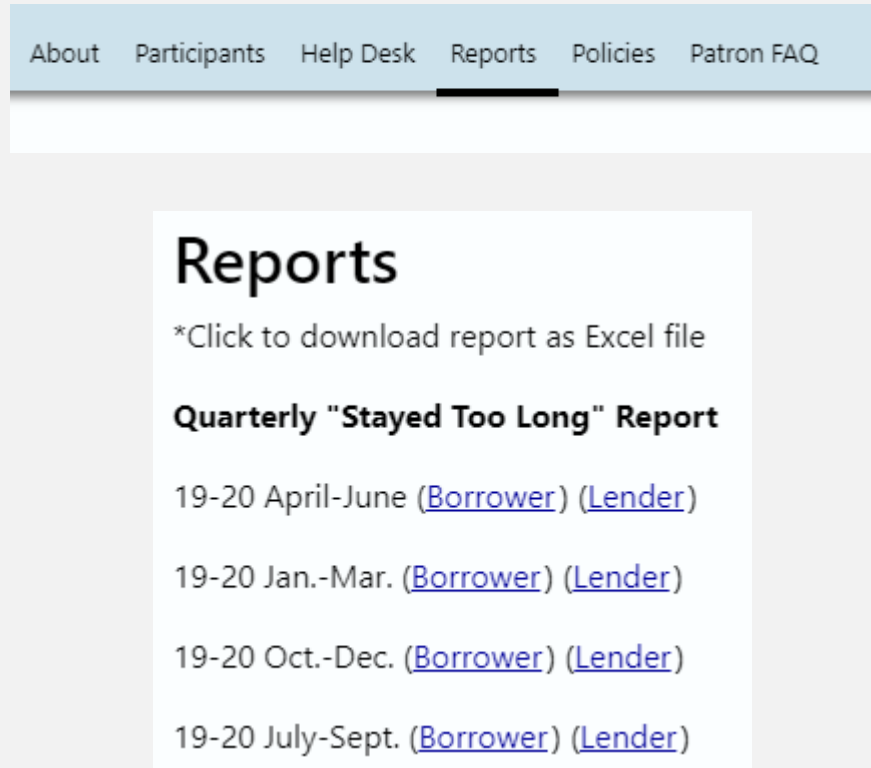
- ❑ “Stayed Too Long” Report
- ❑ Year to Date Statistics
- ❑ Activity Reports

# 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 web application interface. At the top, there is a navigation bar with links: About, Participants, Help Desk, Reports, Policies, and Patron FAQ. The 'Reports' link is highlighted with a black underline. Below the navigation bar, the main content area is titled 'Reports'. Under this title, there is a note: '\*Click to download report as Excel file'. Below the note, the title 'Quarterly "Stayed Too Long" Report' is displayed. Underneath this title, there are four rows of data, each representing a quarter and providing links for Borrower and Lender data:

19-20 April-June	<a href="#">(Borrower)</a>	<a href="#">(Lender)</a>
19-20 Jan.-Mar.	<a href="#">(Borrower)</a>	<a href="#">(Lender)</a>
19-20 Oct.-Dec.	<a href="#">(Borrower)</a>	<a href="#">(Lender)</a>
19-20 July-Sept.	<a href="#">(Borrower)</a>	<a href="#">(Lender)</a>

# Reports Provided by FLO

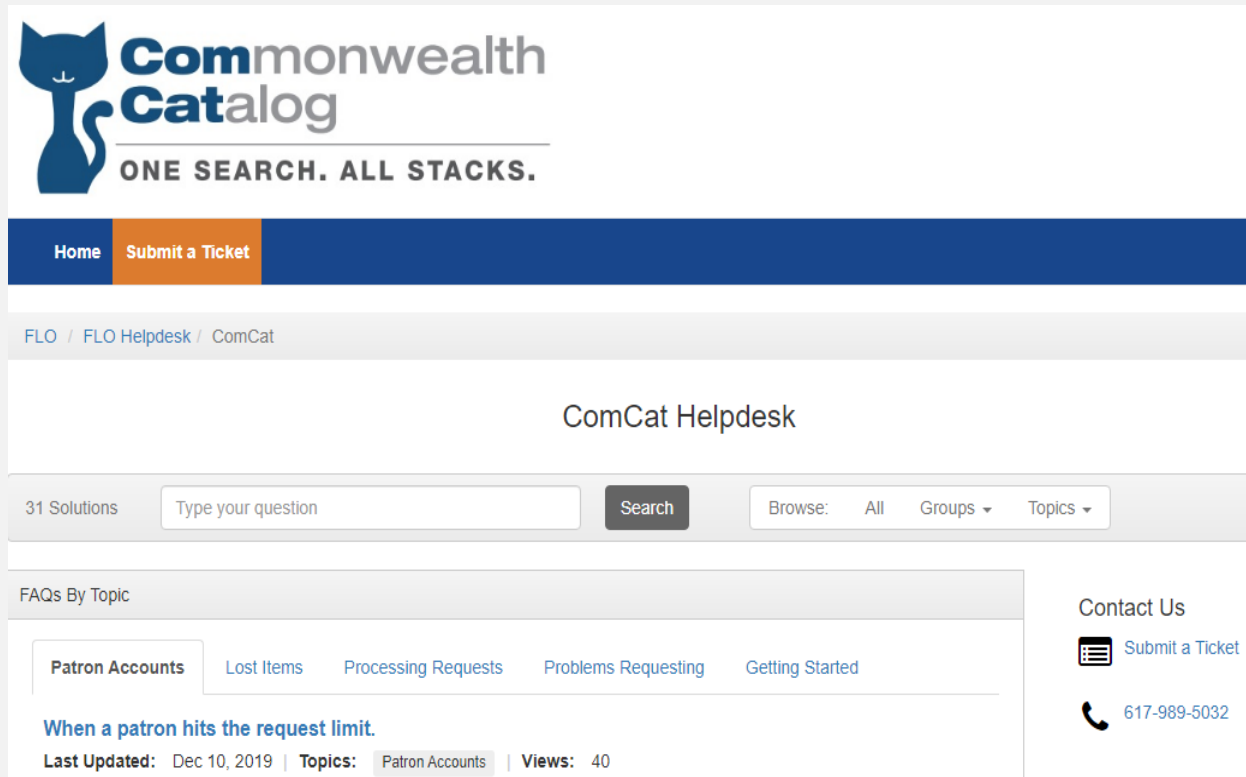
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- “Stayed Too Long” Report
  - Updated quarterly
  - Shows all requests that have been idle for more than 30 days
  - Helps you keep track of lost items or requests that need to be deleted
- Year to Date Statistics Report
  - Updated monthly – Includes 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



- Use helpdesk page in ComCat or go to:  
<https://flo.libanswers.com/comcat>
- You can also email:  
[comcat@flo.libanswers.com](mailto: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



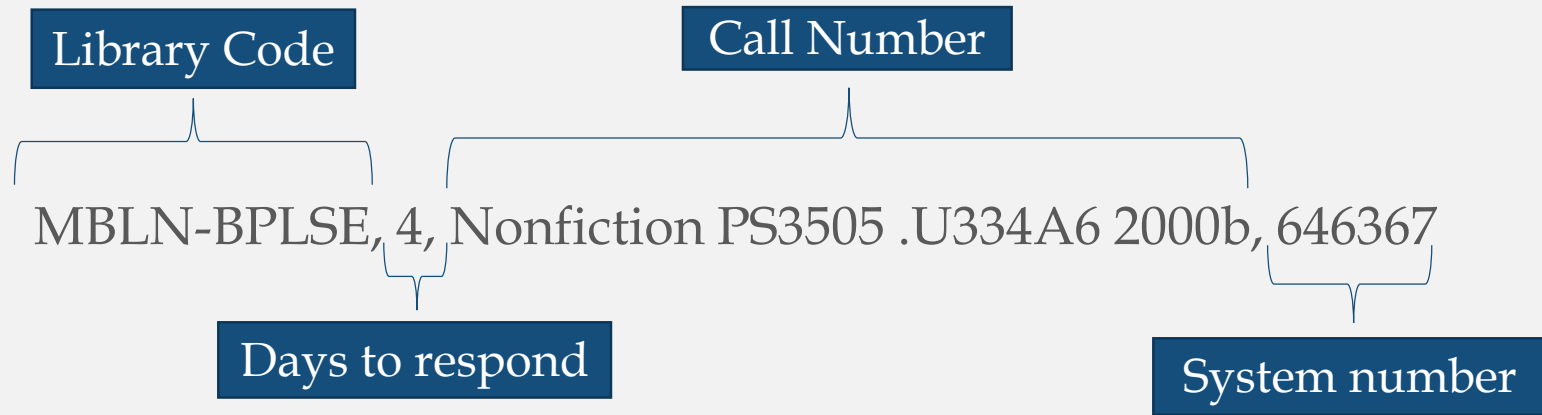
# Request Full Record Display

- ☐ 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

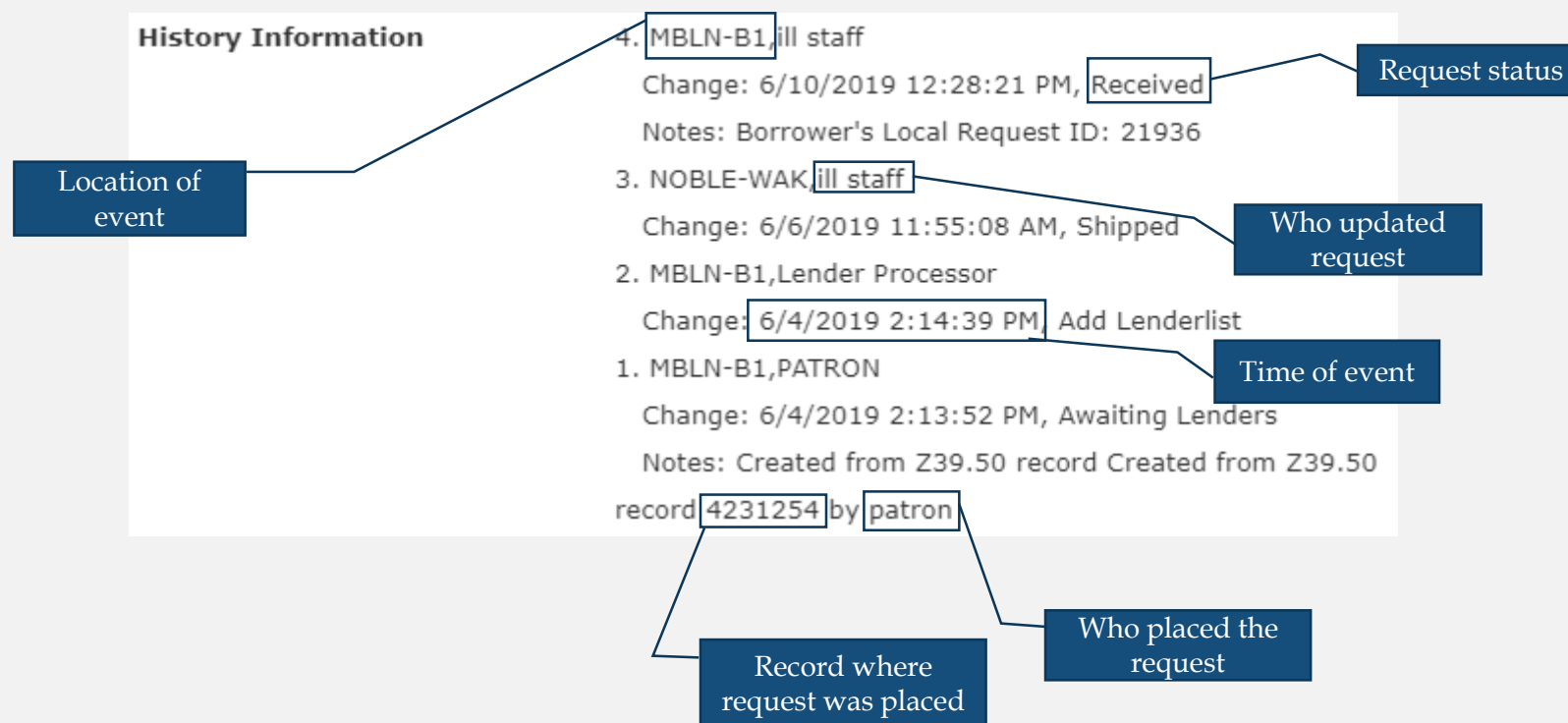
<b>ILL Admin</b>
<a href="#">Request Manager</a>
<b>Borrower</b>
<a href="#">Title Browse</a>
<a href="#">Request Number Search</a>
<a href="#">Patron Browse</a>
<b>Lender</b>
<a href="#">Title Browse</a>
<a href="#">Request Number Search</a>
<a href="#">Maintain Participant Record</a>
<a href="#">Blank Request Form</a>
<a href="#">ALA Form</a>
<a href="#">Maintain Shipping Labels</a>
<a href="#">Maintain Bookstraps</a>
<a href="#">Search Library Information</a>
<a href="#">ILL Request Limits</a>
<a href="#">Set Workstation Printer</a>
<a href="#">User Guides</a>

If you have  
no open  
request

If you have  
an open  
request

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

# History Information

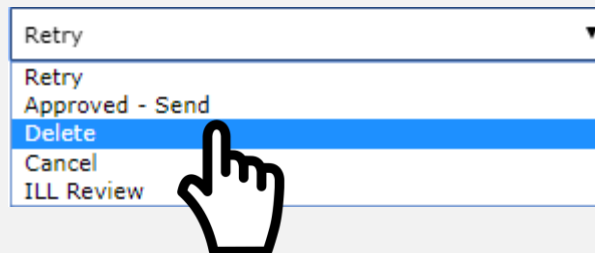


# Important Policies



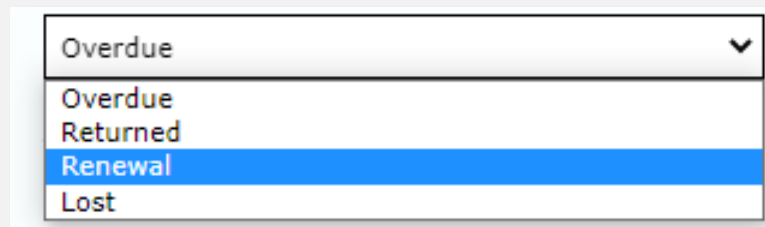
# Managing Patrons' Requests

- ❑ 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.

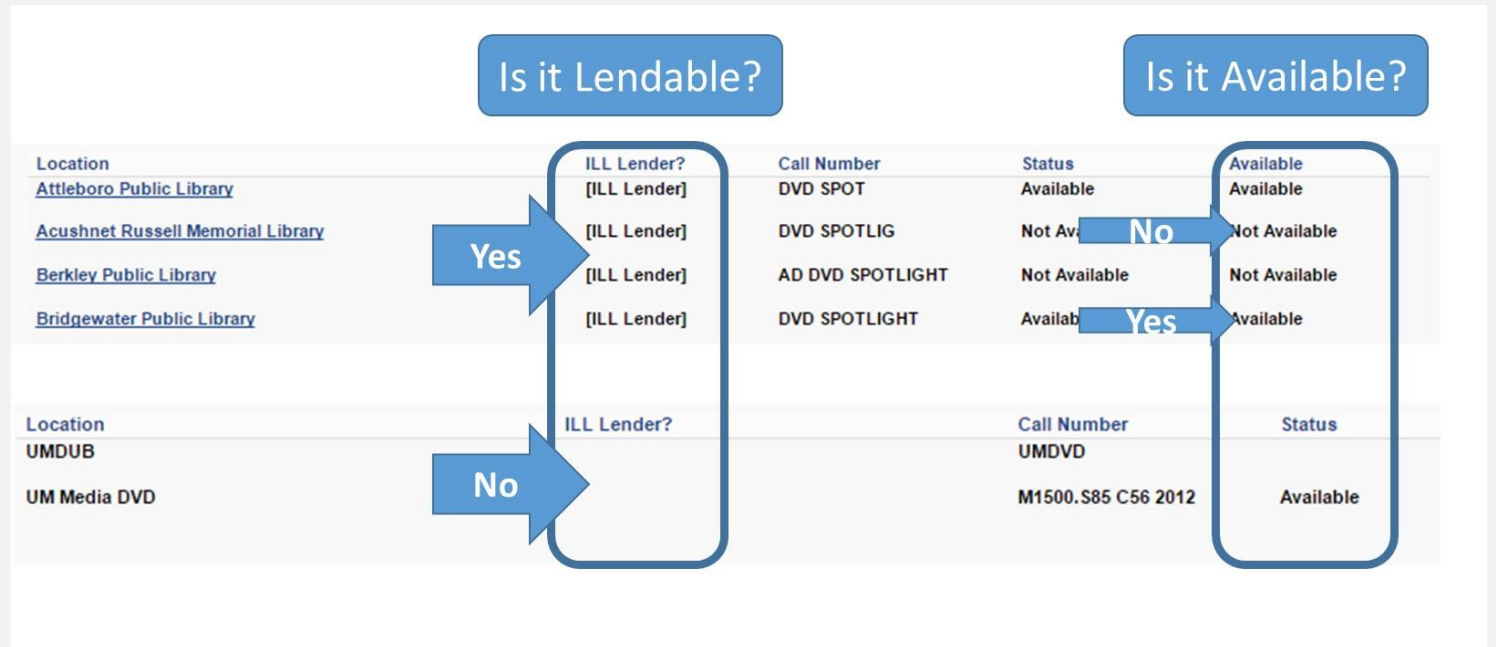
Book	▼
Will not Supply	▼
Omit Reason [Unfilled].	▼
Omit Reason [Unfilled].	▼
At bindery [Retry].	
Charges [Retry].	
Cost exceeds limit [Retry].	
Expiry not supported [Retry].	
In process [Retry].	
In use, on loan [Retry].	
Lacking [Unfilled].	
Lacks copyright compliance [Retry].	
Locations not found [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 question mark icon. A tooltip is displayed over the form, explaining the purpose of the date ranges. The form includes a table with columns for "Start Date" and "End Date".

**Holiday List ?**

**Holiday List**

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](#)

Start Date	End Date
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

[play to patrons](#)

The screenshot shows a web form titled "Contact 1". It includes a "Contact Type" dropdown menu and several input fields for contact information. Some fields are checked with a checkbox, indicating they are required or selected.

**Contact 1**

Contact Type:

☒ ILL Contact Name:

☒ ILL Contact Title:

☒ ILL Phone Number: General

☐ ILL Phone Number: Borrowing

☐ ILL Phone Number: Lending

☐ ILL Phone Number: Contact

☒ ILL Email Address:

☒ ILL FAX Number:

Questions?

