

A close-up photograph of a tennis net. A white tennis ball is perched on the top edge of the net. The net is black with white trim. The word 'TIGER' is printed in black on the white trim of the net, appearing multiple times. The background is dark and out of focus.

# Conditionals - Lending

Eastern - Jay Kibby, Metro - Silvia Cho, Western - Christine Sisak

# Conditionals

1. What is a Conditional in Lending?
2. When to use Conditionals
3. How Conditionals Work
4. Processing Conditionals
5. Setting Up Conditionals in the Customization Manager
6. Additional Conditional Bonus/Outside ILLiad
7. Questions?

# What is a Conditional?

- Question or comment you (as a Lender) can send to the other library (borrower).
- You (as a Lender) are asking them to take action, either a negative, provide more information, and/or edit the OCLC request



# When Can We Use Conditionals?

## 1. Incorrect Citation

- a. Wrong journal
- b. volumes/yrs don't match
- c. Not on those pages

## 2. Special Conditions- In Library Use, etc

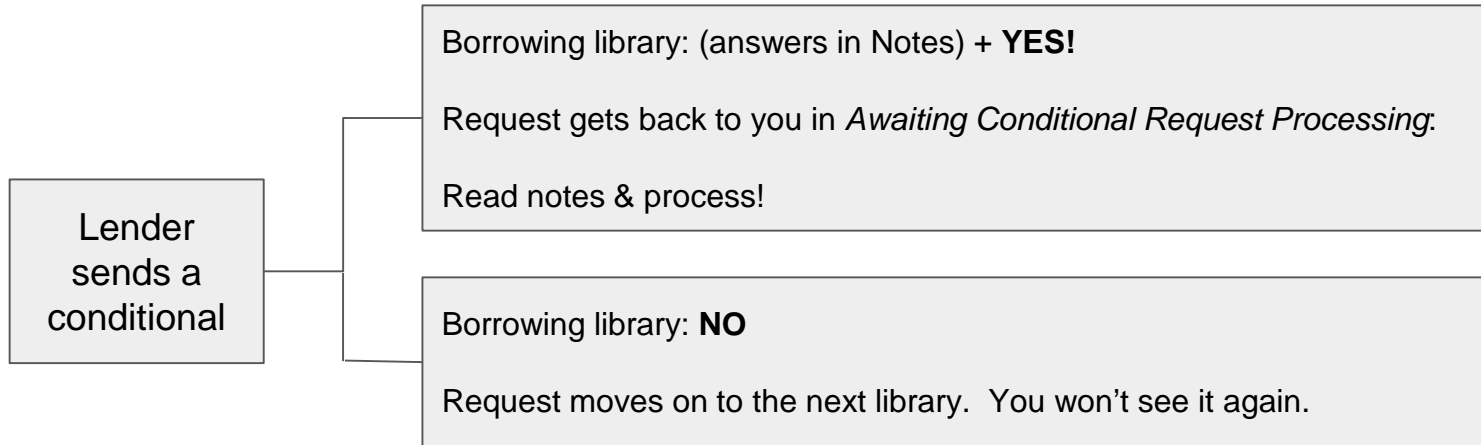
## 3. Exceeds max cost

## 4. Special shipping requirements - request for tracked return, boxed

## 5. More information needed

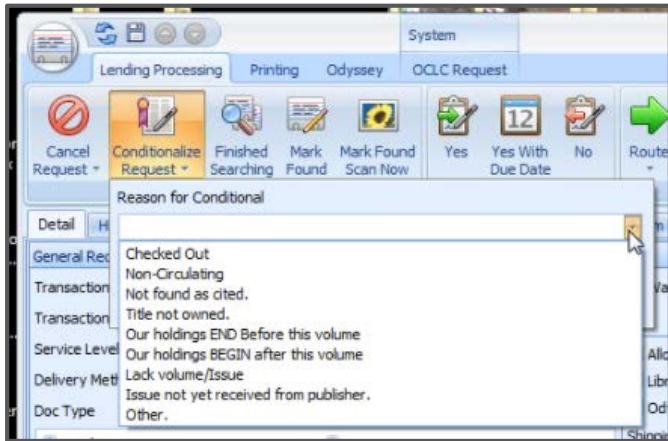


# How Conditionals Work



# Conditionalizing Requests

**Step 1:** <click> Conditionalize Request  
Choose your reason & Type your message



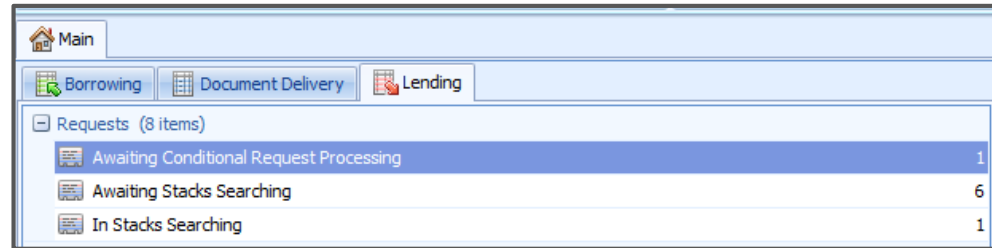
**Step 2:** OCLC Status updates to:

System ID	OCLC	87795
OCLC Status	CONDITIONAL	
Item Information		

# Conditionalizing Requests

Waiting....Waiting....

**Step 3:** They answered!



The screenshot shows a software interface with a top navigation bar containing 'Main', 'Borrowing', 'Document Delivery', and 'Lending'. Below this is a section titled 'Requests (8 items)' containing a list of request statuses and their counts:

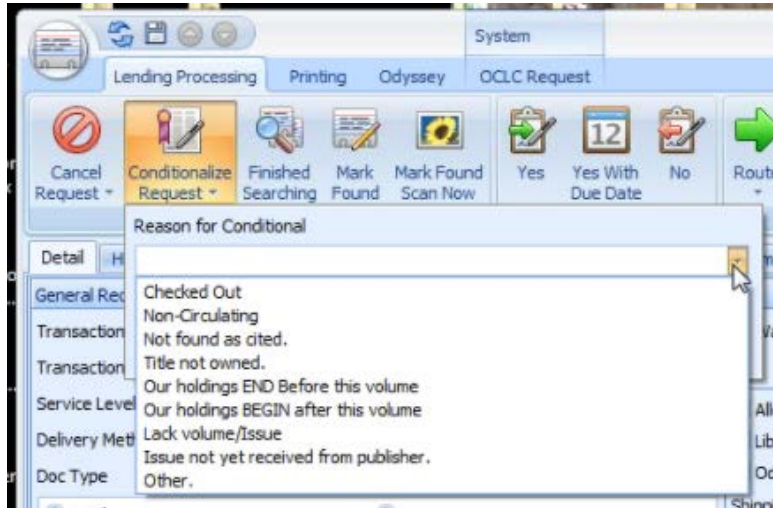
Request Status	Count
Awaiting Conditional Request Processing	1
Awaiting Stacks Searching	6
In Stacks Searching	1

**Step 4:** Check your **Notes** field for the response

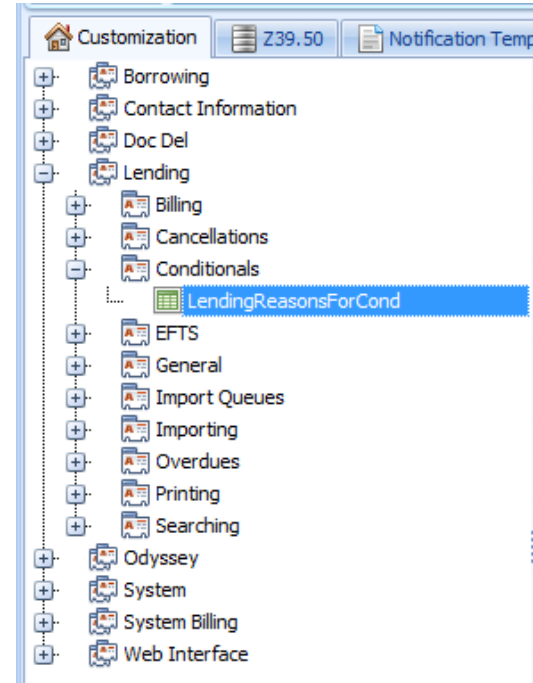
9/19/2017 10:27 AM	Borrowing Notes: This is a loan - sorry for the mistaken `copy` request - thanks,
9/19/2017 6:28 AM	Please indicate chapter title or page numbers. Thank you.

Now you can respond!

# Setting Up Conditionals in the Customization Manager



Your Conditional list in ILLiad



Where it lives in Customization Manager



# Need for OCLC Conditional/Cancellation Codes

## Reasons for Cancellation

Code	OCLC Reason	ISO Reason	Decline Reason
1	InUseOnLoan	In Use On Loan	USE
2	Other	In Process	PRO
3	NotOnShelfMissing	Lost	LOS
4	NonCirculating		NCR
5	NotOwned		NOT
6	OnOrder	On Order	ORD
7	VolumelssueNotYetAvailable	Volume Issue Not Yet Available	NYR
8	AtBindery	At Bindery	BDY
9	LackingVolumelssue	Lacking	LAC
10	NotOnShelfMissing	Not On Shelf	NOS
11	InUseOnLoan	On Reserve	
12	PoorCondition	Poor Condition	POR
13	CostExceedsLimit	Cost Exceeds Limit	CST
14	CostExceedsLimit	Charges	
15	PrepaymentRequired	Prepayment Required	
16	Other	Lacks Copyright Compliance	COP

LendingReasonsForCond				
ReasonNumber	NVTGC	Reason	DefaultNote	OCLCCode
0	Lending	Checked Out		27
1	Lending	Non-Circulating		27
4	Lending	Not found as cited.		27
5	Lending	Title not owned.		27
6	Lending	Our holdings END Before this volume		27
7	Lending	Our holdings BEGIN after this volume		27
9	Lending	Lack volume/issue		27
10	Lending	Issue not yet received from publisher.		27
11	Lending	Other.		27

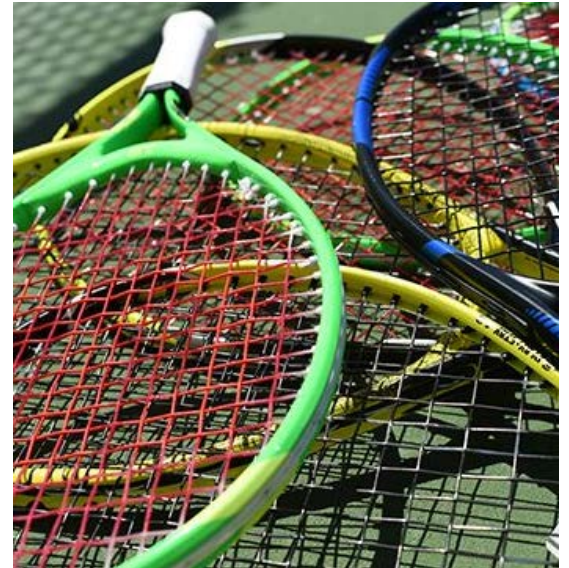
24	PreferredDeliveryTimeNot Possible	Preferred Delivery Time Not Possible	
27	Other	Other	OTH or EXL
30	Offsite		

<https://prometheus.atlas-sys.com/display/illiad/Reasons+for+Conditional>

<https://prometheus.atlas-sys.com/display/illiad/OCLC+Reasons+For+No>

# Additional Conditional Bonus/Outside ILLiad

- Sending along an email in conjunction to the Conditional
  - Open access link information
  - Message is too extensive for Conditional field



# Stats - or where do yours live?

[-] DWA (62592 items)	
[-] Item Shipped	294
[-] Request Finished	45098
[-] Request Conditionalized	651
[-] Cancelled by ILL Staff	16541

**Nazareth College**

Main		
Borrowing	Document Delivery	Lending
[-] To-Do (2 items)		
[-] In Stacks Searching		2
[-] Requests (66738 items)		
[-] Awaiting Lending Request Processing		1
[-] Awaiting Odyssey Sending		1
[-] Cancelled by ILL Staff		12669
[-] Item Shipped		102
[-] OCLC Special Message: Complete?		1
[-] OCLC Special Message: Not Received		1
[-] Request Conditionalized		1
[-] Request Finished		53962

**College of Saint Rose**

# Routing Rule (This slide was added after the Metro RUG)

- System
  - Article Exchange
  - Billing
  - Custom Flags
  - Custom Queues
  - Database Manager
  - Dodine
  - Email
  - General
  - IDS
  - Integration
  - ISOILLDefaults
  - LOCL
  - OCLC
  - Printing
  - Rapid
  - Routing
    - Routing
    - RoutingOn
  - Versions
  - Web Platform

Transaction	Transaction Description	MatchString
Borrowing	Awaiting Request Processing	t.ISSN <> NULL and t.RequestType = 'Article' and (t.LendingString = " or t.LendingString
Borrowing	Awaiting Document Delivery Processing	t.TransactionStatus='Awaiting Document Delivery Processing'
Borrowing	Cancelled by Customer	t.ILLNumber is NULL
Lending	Awaiting Shipping Label Printing	t.CallNumber like 'http%'
Borrowing	In Transit to Pickup Location	t.RequestType='Loan'
Doc Del	In Transit to Pickup Location	t.RequestType='Loan' OR t.RequestType='Article'
Doc Del	Doc Del Customer Notified via E-Mail	t.RequestType='Loan' OR t.RequestType='Article'
Lending	Request Conditionalized	t.ProcessType='Lending'

### Edit Row

RuleNo	This will be your institutions next number
RuleActive	Yes
ProcessType	Lending
TransactionStatus	Request Conditionalized
MatchString	t.ProcessType='Lending'
NewProcessType	Lending
NewTransactionStatus	Cancelled by ILL Staff
RuleDescription	Moves lending requests to NewTransactionStatus-Cancelled by ILL Staff. If borrowing library replies yes to the condition

**Rule Description:** Moves lending requests to NewTransactionStatus->Cancelled by ILL Staff. If borrowing library replies yes to the conditional the transaction will automatically move to Awaiting Conditional Request Processing.

# Questions?

