Conditionals - Lending

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Conditionals

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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

6. Any Edits
How Conditionals Work

Lender sends a conditional

Borrowing library: (answers in Notes) + YES!
Request gets back to you in *Awaiting Conditional Request Processing*:
Read notes & process!

Borrowing library: NO
Request moves on to the next library. You won’t see it again.
Conditionalizing Requests

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

Step 2: OCLC Status updates to:
Conditionalizing Requests

Waiting… Waiting…

**Step 3:** They answered!

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

<table>
<thead>
<tr>
<th>9/19/2017 10:27 AM</th>
<th>Borrowing Notes: This is a loan - sorry for the mistaken <code>copy</code> request - thanks</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/19/2017 6:28 AM</td>
<td>Please indicate chapter title or page numbers. Thank you.</td>
</tr>
</tbody>
</table>

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

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?

Nazareth College

College of Saint Rose
**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?