

# OCLC ILLIAD VERSION 7 REFERENCE CARD

## Processing Unfilled and Conditional OCLC Requests

### Processing Conditional Requests

- Open the Conditional Request by double-clicking on the status or using the **Requests Menu** from the Main Menu. This will take you to the **Awaiting Conditional Processing** request form.
- Select the request you would like to process by double-clicking on the request.
- You can see the conditional note from the Lender in the ILLiad notes field.
- After deciding on a conditional response, open up the **OCLC Resource Sharing** screen by clicking the OCLC button or hitting **CTRL+O**.
- The OCLC work form will be displayed where you have three options.
- To answer **Yes** to the conditional, make any necessary changes to the work form and click the Yes menu option. This will reply to the lender as Yes on OCLC, and move the ILLiad request back to **Request Sent**.
- To answer **No** to the conditional, click the No menu option. This will reply to the lender as No on OCLC and move the request to the next lender in the string and the ILLiad transaction back to **Request Sent**. If the request was already at the last lender, it will change it to an Unfilled request and move the ILLiad transaction to **Awaiting Unfilled Processing**.
- If you want to delete the request at this point, click the **Delete** option. This deletes the request on OCLC and returns you to the ILLiad request form for you to send the request by some other means, cancel it, etc.

### Resubmitting an Unfilled Request

- Open the Unfilled Request by double-clicking on the status or using the **Requests Menu** from the Main Menu. This will take you to the **Awaiting Unfilled Processing** request form.
- Select the request you would like to process.
- You can view the **OCLC Reasons for No** by choosing **OCLC Reason for No History** from the

Show menu. This will display a list of symbols along with the reasons that the sites answered No.

- Open the **OCLC Resource Sharing** interface by clicking the OCLC button or hitting **CTRL+O**. The **Record Detail** tab for that OCLC number will be displayed.
- If you need to select a different record at this point, you can move back a step and choose the **Searching** tab to perform a new search.
- Once you have the record you would like to send, choose your holdings option by using the Holdings menu or the command line. Holdings will be displayed, minus the sites to whom you have previously sent this request. Previous Request information is shown in the lower right hand corner of the screen in the **Previous Request** box including Reasons for No.
- **Custom Holdings** will automatically know not to choose lenders that have been previously used but you may add them back manually if you choose.
- Once you've selected your lenders, click the **Create Work Form** button. The **Work Form** will be displayed.
- Update any information you need to update on the work form. When finished, hit the **Resubmit Request** button to send the new ILL request on OCLC for that Transaction. ILLiad will automatically delete the previous ILL request on OCLC.

### Deleting an Unfilled Request

- Open the Unfilled Request by double-clicking on the status or using the **Requests Menu** from the Main Menu. This will take you to the **Awaiting Unfilled Processing** request form.
- Select the request you would like to process.
- Open the **OCLC Resource Sharing** interface by clicking the OCLC button or hitting **CTRL+O**. The **Record Detail** tab will be displayed.
- Hit the **Delete** button. The record is deleted from OCLC.
- Close the OCLC form to go back to the ILLiad request form. You can choose to send the request by some other means, cancel it, etc.