Welcome to Create constant data.

Today you will learn how constant data can save you time while processing ILL requests and how you can create constant data.

You will also see where to find information on how to contact OCLC Support and access more training and documentation.

Constant data is information about your library that does not change from request to request in the system - information such as your physical address and contact information.

Constant data can auto-fill the fields on the Request Form where you enter this information, thus saving you time and keystrokes when creating or responding to ILL requests and minimizing
the possibility for errors.

Constant data is a big-time saver for both Borrowing and Lending libraries.

You can create as many as you want but don’t create so many that might cause confusion.

You can create constant data for copy or loan ILL requests.

So, let’s see some examples.

First let’s create constant data for loan requests for physical items as a Borrowing library.

Constant data is set up in OCLC Service Configuration.

So, from your Interlibrary Loan service homepage click the OCLC Service Configuration located in the middle section, then on the left side panel click WorldShare ILL, and Borrower data
for Borrowing library.

A default constant data is already in place for your library.

To create a new constant data, you click Create new CD record link located on the right side of the screen.

Then you can start filling out the form.

For this example, we want to create a loan constant data.

First, give a name to this constant data—let's call it Loanfor10 and then give a brief description: libraries offering loans with a maximum cost $10 dollars.

You can leave the Need Before field in blank if you think this might change from request to request or you can input +30 for 30 days, for example.
Let’s select the Request Type to be loan because we are creating constant data for loan requests.

Then leave the Editions field in blank since this information might change according to each request.

Then let’s enter the Shipping and Contact Information.

You can enter the Attention to be ILL Department and the name of the person responsible to facilitate when item arrives at your library.

Then the street number and name.

If the address is too long, then you can use the second line.

This information must be accurate because the other library uses this information to
print the shipping label.

Enter the city, select the country from the list, select the State if applicable, the postal code then the phone number - this is used by the courier, and the same thing with the email address.

If the billing information is the same, you simply click the Copy from Shipping Information button, otherwise you enter the billing information.

Ship Via is for the preferred shipping options such as UPS, Fedex, DHL, for example.

Electronic Delivery is for copy requests only.

If you want to use IFM ILL Fee management as payment method, the method using the library’s OCLC account, you check that option and enter the Maximum cost, for this example is $10
dollars so let’s enter 10 and the currency
US dollars.

Maximum cost is important to be completed
even if it’s zero otherwise your library
is accepting any charges.

Copyright compliance is for copies only not
loans so let’s leave as “None”.

Affiliations are the groups or consortia your
library is part of and has ILL agreements
with.

You can enter the respective OCLC symbol here.

You can add any relevant billing notes and
borrowing notes.

Let’s leave the patron information in blank
because you can use the constant data for
any patron.
Now let’s click the Save as New button to save the constant data.

OK.

Now the constant data is ready to be applied to ILL requests as needed.

You can also edit or delete any constant data you have created by selecting the respective constant data, like in this example for copy requests.

You can edit any field and then click the Save button or if you want to delete the constant data, scroll down and click the Delete Record button located here on the bottom of the screen on the left side.

Now let’s create loan constant data as a Lending library.
On the left side panel, click Lender data.

To create a new constant data, click Create New CD record link located on the upper right side of the screen.

Give a name to the constant data- Let’s call this Loanfor5.

Give a description -items we loan for $5.

Due date is for the maximum loan period- let’s mark +30 to be 30 days, for example.

Shipped date you can leave in blank or mark -00.

This information can change from request to request.

Check IFM box if you accepted this method of payment using OCLC account, add the charge,

for this example let’s add $5 and the currency USD.
Let’s leave insurance amount in blank since this might change for each request.

You can add any lending notes or lending restrictions.

Then enter the address you want these items to be returned to and the preferred method – your courier.

After that click the Save As New button to save the constant data as lending library.

Then when you are creating an ILL request as a borrowing library or replying to an ILL request as a lending library, you will be able to select and apply your constant data and have the system automatically filling out those fields with your library’s information.

Thus, saving you time.

You can find more documentation on this topic.
and contact OCLC Support at help.oclc.org.

Thanks for watching!