



# OCLC WorldShare® Interlibrary Loan: Constant Data

## Introduction

Constant data allows you to create data records that can be saved and applied to both borrowing and lending requests. Once you have entered constant data and saved it, you can select any of your saved records and instantly populate your borrowing or lending fields with this information. This feature saves time in data entry on interlibrary loan requests and workforms.

This document presents scenarios where constant data could be useful for either borrowers or lenders and descriptions of the constant data fields for borrowing and lending.

## Constant Data Records for Borrowers

Constant data records can be created to fit any routine borrowing situation. Examples of situations where constant data records can be useful for borrowers are listed in the table below.

Situation	Suggestion
You regularly borrow photocopies as well as material that must be returned.	Create one constant data record for loans and another for copies.
You request some photocopies be faxed to you, but that most be mailed.	Create one constant data record for <i>faxcopy</i> requests and another for <i>mailcopy</i> requests.
A patron requests multiple items.	Create a temporary constant data record to transfer data specific to that patron into each of the workforms.
You handle all ILL transactions at your main library, but want lenders to ship materials directly to branches when appropriate.	Create constant data records with a different :SHIP TO: address for each branch.
Some faculty members are regular ILL customers.	Create a constant data record for each high-volume customer.

You have established policies for the amount you will pay for each type of ILL material.	Create a constant data record for each type of material with its appropriate :MAXCOST:.
You have established policies for using ILL Fee Management.	Create constant data records with IFM values in :MAXCOST:.
You regularly request multiple copies of the same item for book clubs.	Create a constant data record that contains a Borrowing Note indicating that the request is for a book club.

## Constant Data Records for Lenders

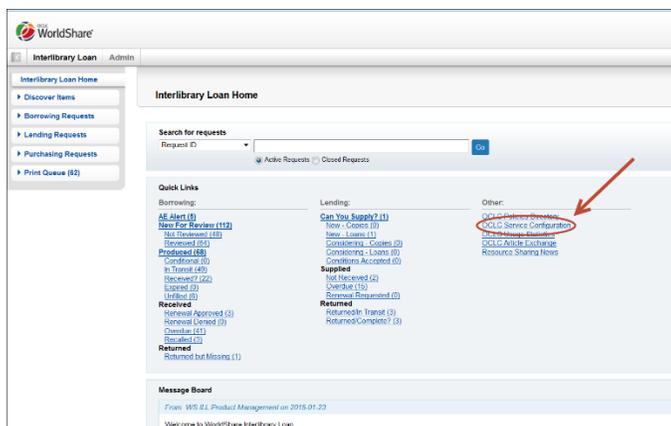
Constant data records can also be created to fit any routine lending situation. Examples of situations where constant data records can be useful for lenders are listed in the table below.

Situation	Suggestion
You regularly loan photocopies as well as material that must be returned.	Create one constant data record for loans and one for copies.
You handle all ILL transactions at your main library, but want borrowers to return materials directly to branches when appropriate.	Create constant data records reflecting a different :RETURN TO: address for each branch.
You have established policies for the amount you charge for each type of ILL material.	Create a single constant data record for each type of material reflecting the appropriate :LENDING CHARGES:.
You lend to members of your consortium free of charge, but charge other borrowers a fee.	Create one constant data record for a freeloan and one for a payloan.
You have established policies for the method	Create constant data records for various ILL

of payment for loans and copies.	Fee Management charges and separate records for invoiced charges, for example, 10IFM or 10INV.
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## Editing Constant Data

Constant data can be edited and updated in the administrative settings for WorldShare Interlibrary Loan within the **OCLC Service Configuration**. You can reach your institution’s Service Configuration options by clicking **OCLC Service Configuration** on the WS ILL Home screen.



For additional instructions on how to edit constant data, see the **OCLC Service Configuration Help** for details about Constant Data for **Borrowers** and **Lenders**.

**Note:** A default constant data record is created for any institution that does not have one.

## Field Details

Please note that there is a 27-character limit on each line, including spaces.

### Borrowing Library Information

Field	Details
<b>Constant Data Record Name (Required)</b>	The name of this record so you can identify it in the drop down menu of constant data records. <b>Note:</b> 20-character limit with no special characters.
<b>Description</b>	A brief description of this record.

<b>Need Before</b>	Date by which you want to receive the item. <b>Note:</b> To assign a period of up to 99 days, type <b>+DD</b> for the system to calculate a date that is 1-99 calendar days from today’s date.
<b>Request Type</b>	<b>Loan</b> Only requests for loans will match. <b>Copy</b> Only requests for nonreturnable copies will match.
<b>Editions</b>	Preferred edition.
<b>Shipping and Contact Info</b>	Complete mailing address and contact information.
<b>Bill to</b>	Billing address. Click <b>Same as Shipping Info</b> to use the same information from the <b>Shipping and Contact Info</b> fields. Otherwise, provide new information.
<b>Ship Via</b>	Preferred method of shipment.
<b>Electronic Delivery</b>	Choose your preferred method of electronic delivery: <b>Ariel (FTP):</b> FTP delivery via Ariel. <b>Article Exchange:</b> Delivery via OCLC Article Exchange. <b>Electronic:</b> Delivery via e-mail. <b>ILLiad Odyssey:</b> Delivery via ILLiad Odyssey software. <b>Note:</b> Electronic Delivery is defined in the <b>OCLC Policies Directory</b> . Log in to the Policies Directory to make changes.
<b>ILL Fee Management (IFM)</b>	Click the check box to turn IFM on or off. For more information on IFM, see <b>Save money while consolidating management of ILL fees</b> .
<b>Maximum Cost</b>	Maximum amount (in US dollars) that you will pay for the item. Type the amount you will pay, and check the IFM check box to apply IFM. <b>Note:</b> This reflects the total cost, not the cost per page. If you will <b>not</b> pay, leave the check box empty and type <b>0.00</b> in the box.

	<b>Note:</b> If you do not provide a value, you are responsible for whatever the Lender charges. If both the <b>IFM</b> and the <b>Maximum Cost</b> boxes are empty, the Lender is able to specify a Maximum Cost amount when the request is returned to you. You automatically <b>agree to pay the specified amount</b> when you update the request.
<b>Copyright Compliance</b>	Indicates your compliance for photocopy requests. There are 2 valid codes: <b>CCG:</b> Conforms to CONTU Guidelines <b>CCL:</b> Conforms to US Copyright law
<b>Affiliations</b>	Symbols, names, or acronyms of your reciprocal or local groups. <b>Example:</b> LVIS
<b>Billing Notes</b>	Additional billing information, if necessary.
<b>Borrowing Notes</b>	Type here any additional information needed to clarify the request.

<b>Patron Department</b>	The patron's department. Be consistent in the use of department names. <b>Examples:</b> Department of Chemistry ChemDept Chemistry
<b>Status</b>	The patron's status. <b>Example:</b> Faculty Executive Undergraduate
<b>Email</b>	The patron's email address.
<b>Address</b>	The patron's address.
<b>Notes</b>	Any relevant information about the patron. <b>Examples:</b> Maximum Cost \$5.00 Can pick up from East Branch on Tuesdays

### Patron Information

Field	Details
<b>Patron Name</b>	The patron's name. For best results, use the format: last name, first name, middle name or initial. If necessary, add descriptive text to differentiate patrons with similar names. Do not enter patron identification numbers in this field. Use ID instead. <b>Examples:</b> Butterworth, Ada Esther Smith, Bob, CompSci Dept.
<b>Patron ID</b>	A number used for patron identification. <b>Examples:</b> 123-45-6789 ALI/6496KRTXX/0001 OH4751603

### Lending Library Information

Field	Details
<b>Constant Data Record Name (Required)</b>	The name of this record so you can identify it in the drop down menu of constant data records. <b>Note:</b> 20-character limit with no special characters.
<b>Description</b>	A brief description of this record.
<b>Due Date</b>	The date on which the Borrower should return the item, <b>not</b> the date on which the item should arrive at your library. <b>When editing a request,</b> type the specific date or specify a time span of 1-999 days from today's date using the format <b>+DDD</b> . <b>For copy requests,</b> type <b>N/A</b> for the <b>Due Date</b> . <b>Example:</b> +120

<b>Shipped Date</b>	The date on which the item leaves your library (past or current), using the format <b>–DD</b> . <i>Examples:</i> -0 -10
<b>Add ILL Management Fee (IFM)</b>	Click the check box to turn IFM on or off. For more information see <a href="#">Save money while consolidating management of ILL fees</a> .
<b>Lending Charges</b>	All costs: handling, photocopying, postage, etc., in US dollars. Numeric data only. Type <b>0.00</b> if there are no charges. To accept a Borrower’s IFM offer, enter a numeric value, and check the IFM check box. <i>Examples:</i> 0 8

<b>Ship Insurance</b>	The amount of insurance, if applicable.
<b>Lending Notes</b>	Required only for Conditional responses. Type additional information or a Conditional query. Optional for non-Conditional responses. Use for notes about method of payment, invoicing, no-renewal responses, etc.
<b>Lending Restrictions</b>	Restrictions that apply to loans. <i>Example:</i> Library use only.
<b>Return to</b>	Complete return mailing address. If you include a <b>Due Date</b> , you must supply a return address. If you type <b>N/A</b> , you need not complete this field.
<b>Return Via</b>	A preferred method for returning loaned materials. This field provides tracing information if the item is lost in transit.



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