

## Constant Data Set-Up for WCRS Users

<http://firstsearch.oclc.org/admin>

**Constant data** is stored information that your institution's ILL staff can use to save keystrokes, reduce errors, and ensure consistency when they initiate or respond to ILL requests. Using constant data is optional, but accomplishes the following:

- Automatically transfers repetitive data to ILL workforms and requests
- Adds to or modifies repetitive data when processing groups of requests or responses

Constant data can be created to fit routine borrowing or lending situations.

Login using your resource sharing autho and password.



The screenshot shows the WorldCat Administrative Module login interface. At the top left is the WorldCat Services logo. At the top right are links for WorldCat Collection Analysis, OCLC FirstSearch, and WorldCat Resource Sharing. The main heading is "Administrative Module". Below this is a login form with fields for "Authorization:" (containing "100276692") and "Password:" (masked with dots), and a "Start" button. To the right of the form are links for "Terms & Conditions", "WorldCat Services Login", "Usage Statistics", "FirstSearch News", "About OCLC FirstSearch", and "Recommended Browsers". At the bottom of the form are language options: "English | Español | Français | 日本語 | 中文(繁體) | 中文(简体)". A small copyright notice is visible at the very bottom: "FirstSearch® Copyright © 1992-2007 OCLC as to electronic presentation and platform. All Rights Reserved."

## Constant Data Options for SHARES libraries

The administrative module provides libraries a place to store their electronic delivery options. Click the **Resource Sharing** section of the main menu, then choose **Constant Data Options** from the drop-down list under **Staff ILL Settings** in the sidebar menu.

Choose your preferred method of electronic delivery, and enter a URL in the field provided.

The screenshot shows the 'Constant Data Options' configuration page. At the top, there is a breadcrumb trail: 'Resource Sharing > Staff ILL Settings > Constant Data Options'. Below this, there is a 'Save Changes' button. The main content area is divided into two sections: 'Persistence' and 'Electronic Delivery Options'. The 'Persistence' section has a checkbox labeled 'On' which is checked. The 'Electronic Delivery Options' section contains several input fields for different delivery methods, each with a help icon (question mark) to its right. The fields are: Ariel (FTP) with the value '123.456.789', Ariel (E-Mail) with the value 'testing@oclc.org', Odyssey, Skype, Yahoo! Messenger, and Windows Live Messenger, all of which are currently empty.

Click the **Resource Sharing** section of the main menu, then choose **Constant Data Records** from the drop-down list under **Staff ILL Settings** in the sidebar menu.

Click **New Blank Record**, enter the desired data in each field. Click **Save Changes**.

We recommend that SHARES institutions create the following four Constant Data Records to facilitate SHARES borrowing and lending.

#### SHRSFREE

Description: used for SHARES to SHARES transactions where libraries do not charge each other for copies or loans, namely art-to-art library transactions and Library of Congress copies worldwide and loans in North America.

#### SHRSCOPY

Description: used for SHARES to SHARES copy transactions where libraries charge each other for \$10

#### SHRSLN10

Description: used for SHARES to SHARES transactions where libraries charge each other \$10 domestic loans

#### SHRS30

Description: used for SHARES to SHARES transactions where libraries do not charge each other \$30 for international loans.

Setting up Constant Data (CD) is done through a workform provided in the administrative module. There are three parts to this workform:

1. Borrowing Library Information-used to describe your institution and automate data that populates requests you are sending to lenders

**Borrowing Library Information**

\*CD Name: SHRS00 Last Modified Date:

Need Before: +28 relative to today's date (format: +DD) ?

Request Type: - select a Request Type - ?

Edition:

Ship To: YOUR LIBRARY'S SHIPPING ADDRESS ?

Bill To: SAME AS ABOVE ?

Ship Via: ARIEL ?

Electronic Delivery: [Define Electronic Delivery addresses.](#) ?

Optionally select your preferred choices of Electronic Delivery method in order of preference in the data record. ?

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Electronic Delivery Service choice 1: Ariel (FTP) 123.456.789

Electronic Delivery Service choice 2: Ariel (E-Mail) testing@oclc.org

- You may choose to set up your Constant Data in different ways, this is just a suggestion. You will create four different constant data records
1. Name the CD record you are working on:
    - a. SHRS00 for free SHARES to SHARES transactions
    - b. SHRS00 for \$10 copies
    - c. SHRS10 for \$10 loans
    - d. SHRS30 for \$30 loans.
  2. State your need before date. WCRS defaults to 28 days
  3. Select Request Type if your CD only applies to copies or only applies to loans
  4. Enter your library's shipping and billing addresses
  5. Enter your shipping preference
  6. Pulling from the Constant Data Options. use the pull-down menus to

ILL Fee Management: (IFM)  Apply ?

Maximum Cost: 00 ?

Copyright Compliance:
 

- None
- CCL: Conforms to U.S. Copyright Law
- CCG: Conforms to CONTU Guidelines ?

Fax: ?

E-mail: ?

Billing Notes: ?

Borrowing Notes: ?

Affiliation: ?

7. Check the IFM checkbox in order to trigger IFM for charges between SHARES members.
  - a. **NOTE: Failure to check the IFM checkbox will result in IFM charges not being assessed.**
8. For free requests, enter 00 as your MAXCOST. For copies and domestic loans enter 10 as your MAXCOST and for international loans enter 30 as your MAXCOST.
  - a. **Note:** if you will use your constant data for non-SHARES transactions that you are willing to pay additional fees to receive, you will need to set your MAXCOST at whatever that non-SHARES MAXCOST is.
  - b. Your SHARES partners will be responsible for charging the correct loan fees and thus only invoking the \$0, \$10 or \$30 fee as appropriate
9. Enter a FAX address, email address and billing notes, borrowing notes and affiliations as necessary

2. Patron Information-some libraries handle many requests on behalf of in thus choose to establish a separate CD for those patrons

**Patron Information**

Patron:  ?

ID:  ?

Department:  ?

Status:  ?

Address:  ?

Phone:  ?

E-mail:  ?

Fax:  ?

Notes:  ?

10. If you are setting up CD to use for individuals, enter relevant information. If not, skip to Lending Library Information

3. **Lending Library Information**-used to describe your institution when you are the lender, responding to borrowing requests.

**Lending Information**

Due Date:  relative to today's date (format: +DD) ?

ILL Fee Management: (IFM)  **Apply** ?

Lending Charges:  ?

Shipped:  relative to today's date (format: -DD) ?

Ship Insurance:  ?

Lending Notes:  ?

Lending Restrictions:  ?

Return To:  ?

Return Via:  ?

\* indicates a required field

11. If you have a standard loan period, enter it as the due date (+# of days)
12. Check the IFM checkbox in order to trigger IFM for charges between SHARES members.
- a. **NOTE: Failure to check the IFM checkbox will result in IFM charges not being assessed.**
13. To set up your lender constant data charges enter the following for each CD record:
- a. SHRS00 for free SHARES to SHARES transactions \$0 and check IFM
- b. SHRSCOPY enter \$10 and check IFM
- c. SHRSLN10 enter \$10 and check IFM
- d. SHRS30 enter \$30 and check IFM
14. This charge will be applied whenever this CD record is applied, manually or automatically using direct request processing.
15. The lender's fee must be equal to or less than the MAXCOST the borrower is willing to pay.
16. Enter any lending notes, restrictions as applicable
17. Enter your Return To address and preferred method of shipping
18. Save changes