

# Checklist: Curate and care for your Constant Data

## Part 4 of the OCLC Resource Sharing Workshop Series

### Review your Constant Data Records

#### Borrower Constant Data

- Uses for Constant Data
  - Copy vs. Loan
  - Free vs. Willing to pay
  - Supporting different pickup/shipping locations
  - Requesting different shipping methods
- Best Practices
  - [Set your method of Electronic Delivery to Article Exchange \(if WorldShare ILL or Tipasa\)](#)
  - Format addresses correctly
  - Name records intuitively
  - Supply a **Max Cost** of 0.00 for records used for free requesting
  - Delete any Constant Data records that are no longer needed
  - **Tipasa:** Do not add any patron specific information
  - **Tipasa:** Set **Copyright Compliance** to “None” if managing copyright in Tipasa

#### Lender Constant Data

- Uses for Constant Data
  - Specifying different due dates for different material types
  - Indicating different lending charges
  - Copy vs. Loan (adding a return address or supporting different return addresses)
- Best Practices
  - Be sure the **Due Date** you apply matches your stated loan periods in OCLC Policies Directory
  - Do not use a large negative offset for **Shipped Date**
  - If you charge via IFM, make sure to check the **Add IFM** box
  - If you charge outside of IFM (via invoicing) add your charge to the **Lending Charges** field
  - Format return to addresses correctly

#### Constant Data Persistence

- [Check to see if it is configured](#) (under **Interlibrary Loan Options** in OCLC Service Configuration)
- If enabled, make sure your Default borrower data record does **not** specify a **Request Type**

#### Assessing Constant Data

##### OCLC Usage Statistics ([www.stats.oclc.org](http://www.stats.oclc.org))

- Review the **ILL Fee Management Reports (Borrower and Lender)**
  - Are you charging and being charged as expected?
- Review the **Borrower and Lender Resource Sharing Stats Reports**
  - All charges, IFM and non-IFM
  - **Maximum Cost** – if this column includes blanks, fix borrower data records