Create constant data transcripts

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 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!