DOCLINE Training Manual

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NRC-CISTI
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DOCLINE OVERVIEW

DOCLINE consists of a number of different modules interacting with one another to form a complete system. This means that users should have an understanding of each of the modules that comprise DOCLINE, and of how these modules interact with one another. In addition, DOCLINE works with other National Library of Medicine Web resources. It is important to understand how DOCLINE interacts with databases such as PubMed and LocatorPlus in order to get the greatest benefit from the system.

Although DOCLINE is not an especially difficult system to use, there are a number of features and functions with which one must become comfortable.

DOCLINE is an interlibrary loan routing and messaging system. In a nutshell, DOCLINE takes a user’s request for a particular journal article or bibliographic item, generates a list of appropriate potential lenders, and sends a message to each potential lender, one at a time, until it has queried all lenders or until a lender responds that it will provide the requested item.

DOCLINE does not play any role in the delivery of requested materials, nor does it have anything to do with any related billing or invoicing. It is the responsibility of each participating library to establish borrowing relationships with each DOCLINE library it wishes to borrow from or lend to.

How DOCLINE is administered

The United States National Library of Medicine (NLM) runs the DOCLINE system. In the U.S., eight regional coordinators administer DOCLINE. In Mexico, one regional coordinator administers DOCLINE. Canadian participation in DOCLINE is coordinated and administered by NRC-CISTI. NRC-CISTI acts as a liaison between Canadian DOCLINE participants and NLM. In addition to being the DOCLINE coordinator, NRC-CISTI is a DOCLINE participant. NRC-CISTI’s role as the Canadian DOCLINE coordinator and a DOCLINE lender are managed separately.

All of the hardware and software used to run DOCLINE is maintained by NLM. NRC-CISTI has no direct control over the functioning of the system itself.

DOCLINE and Canadian Copyright Law

Canadian participants within DOCLINE must comply with the Canadian Copyright Law at all times. For more information, please consult the following webpage: [http://cisti-icist.nrc-cnrc.gc.ca/eng/services/cisti/health-libraries/docline/copyright.html](http://cisti-icist.nrc-cnrc.gc.ca/eng/services/cisti/health-libraries/docline/copyright.html).

How DOCLINE works

When a user inputs a request into DOCLINE, the system uses data drawn from the various DOCLINE modules to process it. Understanding how the data from the different DOCLINE modules are used is important. Users have direct control over their own data profiles and are responsible for editing their profiles in order to optimize the system to best suit their needs.

Purpose of the Institutions database

Institutions is a database that contains information about each participating institution. The data in Institutions serves two purposes. First, it provides important information
about an institution to other DOCLINE users. This information is used in three different ways:

- as contact, billing, and other information printed on DOCLINE requests;
- as browseable library profiles;
- as a selection of Institutions reports.

Secondly, data in Institutions also affects how requests are routed in DOCLINE. If Institutions is not kept accurate and up-to-date, other DOCLINE participants will retrieve incorrect or out-of-date information about your institution, and DOCLINE requests may not route as effectively as they could. Keeping your Institution profile up-to-date prevents these problems.

**Serial Holdings**

Serial Holdings is a database that contains information about the journal holdings of each DOCLINE library. Serial Holdings records each library’s acquisition status and currently held volumes or years of each journal title. Serial Holdings’ primary purpose is to provide DOCLINE with information it needs to decide whether a particular institution owns the volume needed to satisfy a particular request. If, according to Serial Holdings, an institution does not own the required volume, that institution is skipped over as a potential lender.

Serial Holdings also has the ability to produce various types of holdings reports, such as individual and union lists of serials held by an institution or group.

If Serial Holdings is not kept accurate and up-to-date, routing problems can result; a library with inaccurate holdings may receive requests for articles from volumes it does not own or, conversely, be overlooked as a potential lender for some, potentially hard to find, articles. Serial Holdings reports that include that library’s holdings also will be inaccurate.

**PubMed and LocatorPlus**

You can use PubMed and LocatorPlus to locate citations for journal articles and journal titles or monographs, and to import these citations into DOCLINE. The links from PubMed and LocatorPlus to DOCLINE provide a convenient way of verifying citations for journal articles and monographs. You can use this integration to perform literature searches from within DOCLINE and then place batch requests for one or more library patrons without needing to manually transcribe any data.

**Request Routing**

DOCLINE uses a detailed algorithm to determine how to route interlibrary loan requests to potential lenders. Understanding how requests route is important because it allows you to develop an effective routing profile. DOCLINE decides which institutions to send requests that you create based on the following information:

- the request’s routing instructions, which take their default values from your Institutions Routing Table and your Monograph/Audiovisual/non-NLM journals map (M/A/N map);
- the contents of your Routing Table or M/A/N map depending on whether DOCLINE can link your request to a journal in Serial Holdings;
- the library, if any, to which your request is prefixed;
- the Serial Holdings records of any potential lenders;
- the Institutions profiles of any potential lenders, in particular as they relate to the lender's participation in DOCLINE, the delivery methods provided by the lender, and other routing-related information.

DOCLINE uses all of these criteria to select as many potential lenders as possible and to exclude libraries that are unable to fill the request.

These factors also affect which DOCLINE requests you will receive from other participants: the contents of your own Institutions profile and Serial Holdings, combined with the borrowing and routing preferences, serial routing (Routing Table or M/A/N map) and finally the delivery methods of the requesting library will determine whether or not you are selected as a potential lender, and if so, whether you will be one of the first or one of the last institutions asked to fill the request.

Understanding how routing works provides you with the best chance of having your own requests filled. It also minimizes the number of requests that you receive that you cannot fill, while still receiving those requests, which you are both willing and able to fill.

**LIBIDs and user accounts**

DOCLINE LIBIDs consist of a single, six-letter LIBID. For Canadian libraries, this LIBID consists of the two-letter MARC province code (ie: ON for Ontario), followed by a “C” (for Canada), followed by three letters randomly generated by the registration system.

Additional user accounts may also be created for your library. These accounts provide access to either all or a selection of the features of DOCLINE. This allows you to have accounts specially designated for specific tasks, such as updating Serial Holdings, or checking information on libraries in Institutions. If you want additional accounts for your library, you will need to contact NRC-CISTI to have them created.

**System requirements**

DOCLINE has a single Web-interface. The only browsers NLM has confirmed as supporting DOCLINE are Internet Explorer 7.x, Internet Explorer 8.x, and Firefox 3.x.

In addition to the browser requirements, your computer must be set to a display resolution of 800 x 600 pixels or higher. Even at 800 x 600, many users find that DOCLINE is awkward and requires a considerable amount of scrolling. In order to use DOCLINE comfortably, you will want to set your display resolution to at least 1024 x 768 pixels.

The DOCLINE interface relies heavily on the use of JavaScript and multiple frames. In many cases, the use of JavaScript and frames has caused the normal navigation features of the Web browser to work in ways that you would not expect. You should avoid using your browser’s Back and Forward controls when using DOCLINE. Instead, use the controls provided in DOCLINE itself.

Often, and this is especially true if you use a lower-resolution display, you will need to scroll within a frame to find important controls. DOCLINE has the sometimes frustrating tendency to display documents that are just a little bit larger than their containing frame, requiring you to scroll down or over a little bit in order to find important information and navigation controls.
Out of Office
To temporarily deactivate your participation in DOCLINE, go to Institution Update. Complete the form on the Out of Office page and click Request Approval. As soon as your NRC-CISTI Coordinator approves the request, your DOCLINE requests will no longer route to your institution for the specified time period.

Libraries can submit one absence period at a time. Once the library becomes active again, the library can submit the next Out of Office request.

Fig. 1: DOCLINE Out of Office
USING DOCLINE

The URL for DOCLINE is http://docline.gov/. It can be helpful to save this URL in your bookmarks. When you load this page, a new browser window will display containing the DOCLINE login.

Login to DOCLINE using the UserID and password that have been supplied to you. UserID and passwords are not case-sensitive.

The DOCLINE interface is split into two parts (frames). The top frame contains the DOCLINE logo and menu, which remains visible throughout your DOCLINE session. The bottom frame contains the main DOCLINE display, which changes in response to options you select either from within the main display or from the DOCLINE menu.

When you first log in to DOCLINE, the main display will contain the DOCLINE home page.

Fig. 2: DOCLINE home page

DOCLINE menu

The DOCLINE main menu [fig. 2, #1] is divided into five of modules: Home, Requests, Serial Holdings, Institutions, and Loansome Doc Patrons. Selecting a menu option will, respectively, open or close a sub-menu. Selecting a menu option will load a new page into the DOCLINE main display. When a sub-menu is open, the first part of the tab is in blue.

DOCLINE home page

Selecting Home from the DOCLINE main menu will always display the DOCLINE home page.

The home page is divided into two parts. On the left is a notice, which will advise you on the current status of DOCLINE or provide you with important DOCLINE-related
information [fig. 2, #2]. When you first log in to DOCLINE, messages will be displayed in this frame [fig. 2, #3]. Selecting a hyperlinked message will display the relevant DOCLINE page. Following these links is often faster than going through the DOCLINE menu to the appropriate location.

**Institutions**

The Institutions database contains information about all of the libraries that participate in DOCLINE. Within Institutions, you can search for information about other libraries or modify your own library’s profile.

**Using Institutions to update your library profile**

Selecting Update from the Institutions sub-menu will display your profile in detail, allowing you to view and modify it.

![DOCLINE](image)

**Fig. 3: Institutions overview**

The profile is divided into six sections, which can be selected using the six tabs along the left side of the display: Address, People, Membership, Services & Fees, DOCLINE Options, and Loansome Doc [fig. 3, #1].

Above the row of tabs is a bar containing your institution’s name and LIBID [fig. 3, #2]. On the left, in each section except for People, there is a sub-menu [fig. 3, #3]. Selecting a new option from this menu changes the sub-section displayed.

All fields can be updated by changing the value of the field and selecting the Save button [fig. 3, #4]. Fields marked by an asterisk are required.

If you select a new section or sub-section without first saving, you will lose any changes you have made. When you select the Save button, a message will display to confirm that your changes have been made. If you input invalid information in a field, an error message will be displayed. To continue updating your Institutions record, select again one of the five main Institutions sections.
Address
The data in the address section is used wherever mailing or delivery address information is needed. You need to specify both an institution address and a separate document delivery address. Your document delivery address is the "Ship to:" in DOCLINE, which appears on request receipts. The document delivery address should reflect the address where articles and books should be sent: enter your mail address, Ariel, Email, Fax or Odyssey number, depending on your borrowing preferences.

Your billing address is the "Bill to:" in DOCLINE, which appears on request receipts. The billing address should reflect the address where invoices for materials filled by lenders should be mailed.

You can also provide the internet addresses for your institution, library, OPAC, ILL, Loansome Doc, and Consumer Health. Ensure that you add the http:// before all relevant addresses.

People
It is very important that you keep your Institution record up-to-date. If other participants have questions, they will search your Institution record in order to determine whom to contact at your library.

Nine separate contact types are specified: Consumer Health, Director, Interlibrary Loan, LinkOut, Loansome Doc, NN/LM Liaison, Reference, Serial Holdings and Other. You can assign a single person multiple roles. Enter the person's contact information. Fields marked by an asterisk are required. Select which role(s) the person performs by checking the corresponding Contact Type. A Contact Type can be assigned more than once.

The NN/LM Liaison contact is applicable only to U.S. libraries.

To delete a person, press the Edit link next to the contact to be modified. The contact person's record is displayed. Press Delete Person. On the Delete Confirmation page, press Yes or press Cancel to abandon the action.

Membership
The Membership page includes the data elements that describe an institution's DOCLINE membership. The page displays NN/LM membership, DOCLINE membership, serial holdings, batch update settings, and organization identification.

<table>
<thead>
<tr>
<th>Serial Holdings</th>
<th>Level 2</th>
<th>Level 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Holdings</td>
<td>0</td>
<td>11,752</td>
<td>11,752</td>
</tr>
<tr>
<td>Update History</td>
<td>Type</td>
<td>Update ID</td>
<td>Update Date</td>
</tr>
<tr>
<td>Batch</td>
<td>CISTI</td>
<td>05-15-1997</td>
<td></td>
</tr>
<tr>
<td>Online</td>
<td>200ISTI</td>
<td>12-19-2003</td>
<td></td>
</tr>
</tbody>
</table>

Batch Update Authorization: No Authorization Given
Batch Authorization Date: 01-01-2001
Holdings Last Reviewed: 10-19-2001

Fig. 4: Serial Holdings last reviewed date
The Serial Holdings sub-section contains information about the status of your own Serial Holdings participation. Once you have finished adding or updating your serial holdings, you should change the date in the Holdings Last Reviewed field [fig. 4, #1]. It should be used as a reminder to yourself as to when you last checked your Serial Holdings records for completeness and accuracy. Don’t forget to use the Save button after changing the date.

The fields in the Organization ID section allow you to specify OCLC and Marc codes for your library, if you wish. You may also enter a short, relevant comment if you desire.

Codes are important in determining the behavior of certain system functions, such as Institutions searching, and affect certain Institutions and Serial Holdings reports. If any of the Display Only codes need to be updated, you will need to contact the NRC-CISTI DOCLINE team at docline.cisti@nrc-cnrc.gc.ca and request that they be changed.

Services & Fees
The Services and Fees section contains four sub-sections. The information in the Copy Services and Fees and in the Loan Services and Fees sections is not used by the system, but is made available so that other DOCLINE participants can examine your profile to learn what your interlibrary loan policies and charges are.

ILL Services
The ILL services sub-section allows you to indicate which services your library offers. Check the boxes that correspond to statements that apply to your institution, and make sure that those that do not apply are unchecked.

There is also room for general service comments. Note that you can add specific notes in each ILL Services sections.

If you need information on EFTS (Electronic Fund Transfer System), see our page on "About Electronic Fund Transfer System (EFTS)"; http://cisti-icist.nrc-cnrc.gc.ca/eng/services/cisti/health-libraries/docline/fund-transfer.html.

Copy Services and Fees
Library groups to which your library belongs will display with their associated charges and comments.

You may modify your base fee charge for reciprocal ILL partners and enter any explanatory comments. You may also modify your base fee charge for other ILL borrowers and enter any explanatory comments.

You can indicate whether your library provides copy service to international libraries by checking the Yes or No radio button. If you select Yes, indicate to which countries you provide service. If you choose Selected Countries, press Add/Delete Countries. Select the countries served in the Countries popup window and press Save. Do not forget to save at the top or the bottom of the page.

If your library will loan Audio/Visual, Books, and Journals, check Yes. If Yes, indicate whether your library will renew loans for these material types. If Yes to Loans, indicate your library’s base fee and loan period. If Yes to Renewals, indicate your library’s renewal period.
If your library provides loan service to international libraries, check the Yes radio button. You will then need to indicate to which countries you provide service. If you choose Selected Countries, press Add/Delete Countries. Select the countries served in the Countries popup window and press Save.

To add any copy or loan surcharges your library adds to its base fee for specific services or conditions, select the surcharge type from the pull down list and press Add Surcharge. You will then need to enter the surcharge amount and explanatory comments.

Other Services
The Other Services section of the Institutions record allows you to detail the kinds of health-related services your library provides. The data in this section are used in some Institutions reports. If you would like your library to be listed in the MedlinePlus Consumer Health Libraries Directory, check the Yes radio button for Authorizes listing in MedlinePlus. If you need more information on MedlinePlus, follow this link: http://www.nlm.nih.gov/medlineplus/.

You can indicate if your library provides listed services for each of the user populations by checking the radio button. If your library charges for some or for all services, check the radio button under Charges. You can also include comments.

If you do not complete this section, it will not have any effect on the behavior of DOCLINE itself but, since the information is useful to other libraries, it is strongly recommended that you do provide it.

DOCLINE Options

Borrowing Preferences
Your borrowing preferences enable you to specify default values to use for each ILL request you create, instead of always having to fill in the same information for each request. You may fill in some or all of these fields with the values that you always or usually use. When you create a DOCLINE request, you will still have the opportunity to change some or all of the default values for that request on the Routing Instructions page.
Fig. 5: Borrowing Preferences

The Authorized By field [fig. 5, #1] is required and should contain the name or initials of the person authorizing the request.

The Maximum Cost field [fig. 5, #2] is the amount you are willing to pay for ILL material. Enter a numeric value. If you need the material free of cost, enter 0.00. Select Any cost if your library is willing to pay any amount for ILL material. Remember that if a U.S. library receives your request, it will assume the maximum cost is specified in U.S. dollars.

The Require Patron Name field [fig. 5, #3] provides the option to have the patron name required or not required during the borrowing request process.

The Copyright Compliance field [fig. 5, #4] is intended primarily for U.S. borrowers who are responsible for complying with copyright law, either the U.S. Copyright Act of 1976 (CCL) or the Copyright Guidelines (CCG). Canadian participants within DOCLINE must comply with Canadian copyright law at all times.

The Comments to Lenders field [fig. 5, #5] allows you to specify any special instructions or comments you may want a potential lender to see. These comments will be displayed by default on the DOCLINE Receipts. To avoid confusion and since some libraries use automated systems, NLM recommends using only the alternate delivery method field to indicate a borrower's delivery instructions/preferences, and not the comments field.

The Service Type field [fig. 5, #6] allows you to indicate whether you are requesting a copy, a color copy or the original (loan).

The Service Level field [fig. 5, #7] allows you to choose between Normal, Rush or Urgent Patient Care processing. Rush is defined as same-day delivery. Urgent Patient Care is
defined as processed and shipped immediately. If a borrower selects Rush or Urgent Patient Care service, then the request would only route to libraries that indicate they provide that level of service and match the other routing instructions. Rush and Urgent Patient Care requests will display as separate “awaiting RECEIPT” messages on the lenders home page. Rush and Urgent Patient Care service level requests are also indicated on the Receipt.

The Network Delivery Method [fig. 5, #9] and NLM Delivery Method [fig. 5, #8] fields indicate how you want to receive the request — filled by a DOCLINE library or by NLM, respectively. The values you put in these fields affect how DOCLINE will route the request. Ensure that you enter your preferred delivery method (such as email).

The Network Alternate Delivery Method(s) field [fig. 5, #10] allows you to specify one or more acceptable alternate delivery methods. These can be modified with each request.

During routing, cell by cell, DOCLINE will route first to libraries that hold the year or volume of the title requested and that support your preferred delivery method, and then route to libraries that support one of your alternate delivery method(s). For example, if your preferred network delivery method is Web PDF and your alternate delivery methods are Email PDF and Ariel, the algorithm would first route to cell 1 libraries that deliver via Web PDF, then try to route to cell 1 libraries that support Email PDF or deliver via Ariel. If the request had to go to cell 2, it would first route to cell 2 libraries that deliver via Web PDF, and then try to route to cell 2 libraries that deliver via Email PDF or deliver via Ariel, and so on.

The preferred delivery method continues to be shown in the Ship to: area of the receipt. Alternate delivery methods are displayed in the body of the receipt.

The Route Only to EFTS Participants field [fig. 5, #11] allows you to send requests to Electronic Fund Transfer System (EFTS) participants only. EFTS is a transaction-based electronic billing system developed by the University of Connecticut Health Center for ILL and document delivery charges. If you need information on EFTS, see our page on About Electronic Fund Transfer System (EFTS): http://cisti-icist.nrc-cnrc.gc.ca/eng/services/cisti/health-libraries/docline/fund-transfer.html.

The following image provides a look at a borrow copy [fig. 6].
Fig. 6: Borrow Copy
Serial Routing and M/A/N Routing

In the Serial Routing area, indicate the default routing instructions for serials including your Routing Table Default Cells [fig.7, #1]. You are given the option of selecting the cells to which you would like your request to route. These can be modified with each order. You can also update your Routing Table with the Edit hyperlink [fig.7, #2]. Also, indicate whether to Refer to Resource Libraries [fig.7, #3], whether to Route to NLM [fig.7, #4], and whether to select All Other Libraries [fig.7, #5]. The Do Not Route To [fig.7, #6] feature allows you to bypass individual library in a Library Group in your Routing table, among Resource Libraries, or refer on to “All Other Libraries”. A maximum of 20 libraries may be entered.

In the Monographs, Audiovisuals, and Non-NLM Journal (M/A/N) Routing area, you can view the LIBIDs that you have selected in your M/A/N Map. You can modify your M/A/N Map by clicking on the Edit M/A/N Map button [fig.7, #7].
Lending Preferences

Select the delivery methods available at your institution [fig. 8, #1]. This will help other participants establish their routing table and is also essential for the routing process. Libraries have the option of being notified by email each time a new request routes to their library [fig. 8, #2]. Libraries have the option of choosing to receive email notification by request type - Normal, Rush, and/or Urgent Patient Care and Loansome Doc. Libraries may wish to consider using a shared email account so notifications are not missed during staff absences. The email notification is sent from the address docline@mail.nlm.nih.gov. If email messages from DOCLINE are sent to your Junk Mail folder, please contact your local email administrator to have DOCLINE email directed to your Inbox.

Select the initial tab to display in Lend - **Batch or Single** with the *Lend default screen* option [fig. 8, #3]. If you are using other software such as OCLC Illiad, Relais, VDX, you can add them to the *Additional Software Options* area by clicking on the *Add/Delete Products* button.
Routing Table

The Routing Table is the grouped list of institutions to which you want your serial requests to route. The institutions listed are your primary-lending partners. The Routing Table is comprised of nine cells, each of which can contain up to twenty libraries. The order of routing is sequential from Cell 1 through Cell 9. All libraries within a cell are evaluated for routing a request before the routing algorithm moves to the next cell of libraries. Routing within a cell is random to provide a degree of load balancing. Since routing within a cell is random, institutions are displayed in alphabetical order in the Routing Table. There is no "position" within a cell, which determines routing order.

To create or edit your routing table, click on the Edit Routing Table button [fig. 7, #5].

Fig. 9: Routing Table proposed view

The Proposed tab [fig. 9, #1] allows you to edit your Routing Table and consists of your Routing Table currently in use by DOCLINE for routing plus any changes you have made (additions, deletions, moves). The Workspace [fig. 9, #2] contains any libraries, which you have added from Institution Search, added via Add to Workspace on this page, or previously moved from the current Routing Table. In the Add to Workspace area [fig. 9, #3], you can enter a valid LIBID and press Add. The institution will then be added to the Workspace. In the Proposed Routing Table, click on the numbered tab corresponding to the cell to which you want to add an institution. In the Workspace, select the library or libraries to add to that cell by checking the box next to the institution name. Press the left pointing arrow pointing from the Workspace to the Routing Table or in the Workspace, select the library or libraries to add by checking the box next to the
institution name. In the Workspace, select “Move to Cell #” from the list box and press Go. Press save [fig.9, #4]. Press Request Approval [fig.9, #5] once all changes have been made. This notifies NRC-CISTI, the DOCLINE Coordinator in Canada, to review your Routing Table changes. The message "Routing Table is awaiting approval" will appear in your Activity and Status area of the Home page. Note that your Routing Table changes do not take effect until the DOCLINE Coordinator approves them. Once approval has occurred, the message on your Home page will be removed.

To remove an institution from your Routing Table, click on the cell number, which contains the institution to be removed. Select the institution(s) to be deleted by clicking the checkbox next to the institution name. Press the right pointing arrow to move the institution to the Workspace for later use or Press Delete. Press Save. Press Request Approval once all changes have been made.

To move an institution in your Routing Table, click on the cell number, which contains the institution to be moved. Select the institution to be moved by clicking the checkbox next to the institution name. In the Proposed Routing Table, select "Move to Cell #" from the list box and press Go. Press Save. Press Request Approval once all changes have been made.

To view your current Routing Table, click on the Current tab [fig.9, #6]. The Current tab displays the Routing Table currently in use by DOCLINE for routing.

To view your Routing Table changes, click on the Compare tab [fig.9, #7]. The Compare tab displays the difference between your Routing Table currently in use by DOCLINE for routing and your "Proposed" Routing Table, which contains your changes.

To print your Routing Table, Click on the Print All Cells link located on the left hand side of the Routing Table screen. Your library's current Routing Table will be displayed. Print via your browser's printing function (File, Print). Close the Print window.
Routing Table Maintenance

You can add a Library Group from your Workspace [fig. 10, #1] to any cell of your Routing Table [fig. 10, #2], just as you currently do with an individual library. Each Library Group will occupy one row in a cell. The routing algorithm continues to be random, it is recommended to place a Library Group alone in a single cell.

The software allows for a library to be added to a Routing Table that also exists in the Routing Table as part of a Library Group. A request would only route to the library once.

Routing Table Statistics

To view which institutions have your library in their Routing Table, select Requests on the DOCLINE Navigation bar. On the DOCLINE sub navigation bar, select Reports. Your library's list of available reports will then be displayed. Click on the Routing Table Statistics link.
M/A/N Map

The M/A/N Map is an ordered list of institutions to which your monographic, audio/visual, and journal titles not in NLM’s OPAC requests will route. The institutions listed are generally your primary-lending partners. The M/A/N Map is comprised of nine rows. The order of routing is sequential from Row 1 through Row 9.

Fig. 11: M/A/N Map

The Workspace contains any libraries, which you have added from Institution Search, added via Add to Workspace on this page, or previously moved from the M/A/N Map. In the Add to Workspace area [fig.11, #1], you can enter a valid LIBID and press Add. The institution will be added to the Workspace [fig.11, #2]. In the Workspace, select the library or libraries to add to the M/A/N Map [fig 11, #3] by checking the box next to the institution name, then press the arrow pointing from the Workspace to the M/A/N Map. The institutions will then be added to the bottom of the ordered list in order by LIBID. Institutions are automatically reordered, moving each institution down one row. Do not forget to save.

To remove an institution from your M/A/N Map select the library or libraries to delete from the M/A/N Map by checking the box next to the institution name. Press the right pointing arrow to move the institution to the Workspace for later use or press Delete. The Institutions will then be automatically reordered, moving each library up. To move an institution within your M/A/N Map select a library to move by checking the box next to the institution name. Then select "Move to Row #" from the list box and press Go. The Institutions are automatically reordered, moving the other institutions in the list up or down.
Loansome Doc Services

The Loansome Doc services subsection contains three subsections Services, Delivery Methods, and Registration. In the first section, you must check the Loansome Doc Provider checkbox if you provide Loansome Doc services. If you do not check this checkbox, you will not receive Loansome Doc requests.

You should also indicate which groups you provide Loansome Doc service to and which group or groups you charge. If your library provides service to users residing in an international country, indicate to which countries you provide service.

This information is used in Institutions reports. You may also include a comment, if one is appropriate.

In the Delivery Methods section, indicate the type of delivery methods you provide to Loansome Doc clients. In the Registration section, you can indicate if people trying to register for a Loansome Doc account require an authorization code. If you select Yes, you must indicate a code of your choosing in the box below. You can then provide this code to new users that want to register for an account. You can require library defined identification (such as a student number). If you select Yes, you must provide a label for the identification field. Finally, you can provide instructions to users for the use of the identification field.

Searching Institutions

The Institutions database provides valuable information about other DOCLINE participants. There are a number of reasons to search Institutions. Some of them include:

- Matching a library name and contact person to a LIBID;
- Viewing another library’s profile in detail;
- Generating a list of libraries that match certain criteria, such as being part of a particular geographical area, or being a Loansome Doc participant;
- Generating a report, such as the contact names and addresses for all DOCLINE participants in a particular region.

Finding Institutions

Fig. 12 Institutions search form
To find an Institution record by LIBID, enter a complete or a partial LIBID in the first search box [fig. 12, #1]. Press enter or click Search. To retrieve multiple institution records simultaneously, enter complete LIBIDs followed by a space or a comma.

- Example: ONCBNO, ONCSTW, PQCSTU

To find an Institution record by Institution Name, enter keywords from the institution name in the second search box [fig. 12, #2]. Press enter or click Search. A list of institutions matching your search criteria will be displayed sorted by institution name. The institution and library name fields for all address entries (institution, document delivery, and billing) are searched. To perform a truncation search, enter an asterisk (*) at the beginning or end of a word. To perform a phrase search, enter the search terms within double quotation marks.

- Example: V* AFFAIR*
  *FIELD
  “MEMORIAL LIBRARY”

To find an Institution record by library contact name, enter one or more words from the person’s name in the Contact Name search box [fig. 12, #3]. To perform a truncation search, enter an asterisk (*) at the beginning or end of a name.

If you need more options to create your search, click on More Search Options [fig. 12, #4] from the Search page. This will lead you to the Search Builder.
Search Builder

The Search Builder permits you to search with one or more terms from the pull-down list and narrow your search with Filters.

Search Builder

Build your search by selecting from pulldown lists and filters.

---

**Fig. 13: Search Builder**

To query a specific field in the Institution record, select the desired Search Field [fig.13, #1]. From the Contains field [fig.13, #2], choose the relationship between your search criteria and your field data [fig.13, #3]. Depending upon the Search Field selected, you will select from a drop-down list (e.g. Library Group or State/Province) or type in a value (e.g. City or OCLC code). Click Add to Search [fig.13, #4]. To search additional fields, choose a Boolean operator [fig.14, #1]. If you would like to modify your search, click on Edit Search [fig.14, #2].

---

**Fig. 14: Search Builder with Boolean**

To limit your search results, press any of the buttons in the Filters box [fig.13, #5]. This area of the Search Builder allows you to further limit your search to a class of libraries, such as those, which are in your region (Top Filters), or those which deliver by Ariel (Delivery Methods), or those which are Academic Libraries (Membership Information), or those which fill rush requests (Services). Select the search limits to apply to the search. Press Add to Search. Once you have completed all the necessary fields, select the Search button [fig.13, #6].
Changing the Display Format

From the Search Results page, you can change the display of your results. This can be done from the Search Criteria area.

Search > Results

Search Criteria: Institution Name contains OTTAWA
Filters: Hospital

View: Institution List  Sorted by: Institution Name  Results per page: 25

3 Results  page 1

<table>
<thead>
<tr>
<th>LIDID</th>
<th>Institution Name</th>
<th>DECLINE Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>ONKAW</td>
<td>Ottawa Hospital General Campus Library Services</td>
<td>Not a DECLINE Library</td>
</tr>
<tr>
<td>ONKAC</td>
<td>Ottawa Regional Cancer Centre Beatrice Library - Interlibrary Loans OTTAWA, ONTARIO</td>
<td></td>
</tr>
<tr>
<td>ONKAY</td>
<td>The Ottawa Hospital Library Services Ottawa, Ontario</td>
<td></td>
</tr>
</tbody>
</table>

Select All  Clear All

Fig.15: Search results

If you would like to change the institution information displayed in the Search Results page, click on the View [fig.15, #1] link in the Search Criteria display area. The Search Results page is repositioned to display the View Options area. Select one of the five categories of information to display from the View drop-down list [fig.15, #4]:

- Address: Displays institution, document delivery, and billing address
- Complete Record: Displays all the information available on the institutions
- Contact/People: Displays all of the institution’s staff contact information
- Institution List: Displays a list of the institutions with name, city, and state/province
- Interlibrary Loan: Displays details of the institution’s ILL services and costs
- Services: Displays a summary of the institution’s offered ILL, Loansome Doc, and other services recorded in their institution record

Press Refresh [fig.15, #7] to view the changes.

If you would like to change the sort order of your search results, from the Search Results page, click on Sorted by link [fig.15, #2] in the Search Criteria display area. The Search Results page is repositioned to display the View Options area. Select the data element for sorting the display from the Sort drop-down list [fig.15, #5]. Press Refresh [fig.15, #7] to view the changes.

If you would like to change the number of records displayed per page, from the Search Results page, click on the Results per page link [fig.15, #3] in the Search Criteria display area. The Search Results page is repositioned to display the View Options area. Select the number of institutions to display from the Results per page drop-down list [fig.15, #6]. The options listed in the number of records list are linked to the View selected. Views
that contain large amounts of data allow fewer numbers of records to be displayed. Press *Refresh [fig. 15, #7]* to view the changes.

**Modifying your Search Query**

**Search > Edit Search**

Modify your search by changing selection(s) from pull-down lists, search value(s) or filters.

**Fig. 16: Edit search**

If you need to modify your search query, from the Search Results page, click on *Edit This Search [fig. 15, #8]* in the Search Criteria display area. Your current search query will then be displayed on the *Edit your search* page. You can modify your search query by:

- Selecting a different *Search Field* [fig. 16, #1] and / or modifying the search term
- Add additional criteria by pressing *Add Another Line* [fig. 16, #2]
- Remove criteria by clicking *delete* to remove an entry [fig. 16, #3]
- To modify your search filters, click on one of the filters [fig. 16, #4]:
  - Select or deselect any criteria to modify your search filters
  - Press *Add to Search*
- Press *Search* to run the new query [fig. 16, #5].

**Adding Institutions to your Routing Table from your Search**

**Fig. 17: Routing Table confirmation page**

You are about to add the following record(s) to your Routing Table Workspace:

- ONCOAN  Ottawa Regional Cancer Centre - Bagot Library - Interlibrary Loans
- ONCASHV  The Ottawa Hospital - Library Services

The following record(s) can not be added to your Routing Table Workspace:

- ONCTAW  Ottawa Hospital General Campus - Library Services *Not a DECLINE Library*
If you want to add institutions to your Routing Table from the Search Results page, select the institutions to be added by clicking in the check box next to the institution name [fig.15, #9]. Scroll to the bottom of the page to the Actions for Selected Institutions area. Press Add to Routing Table [fig.15, #10]. A confirmation page displays indicating the institutions about to be added to the Routing Table Workspace and any which could not be added and why. For example, non-DOCLINE libraries cannot be added to a Routing Table [fig.17, #1].

You can press Add and Proceed to Routing Table [fig.17, #2] to add the listed institutions to your Workspace and proceed to your Routing Table for updating.

One other option is to Press Add and Return to Results [fig.17, #3] to add the listed institutions to your Workspace and return to your search results. You can continue searching and adding more institutions to the Workspace or proceed to other tasks. You can access your Routing Table at any time by selecting Institutions, then Update your Library from the DOCLINE navigation bar. The Workspace is retained even if you log out of DOCLINE.

If you decide not to add the chosen libraries to your Routing Table, press Cancel [fig.17, #4] to abandon the action.

Adding Institutions to your M/A/N Map from your Search

![Fig.18: M/A/N Map confirmation page](image)

If you want to add institutions to your M/A/N Map from the Search Results page, select the institutions to be added by clicking in the check box next to the institution name [fig.15, #9]. Scroll to the bottom of the page to the Actions for Selected Institutions area. Press Add to M/A/N Map [fig.15, #11]. A confirmation page displays indicating the institutions about to be added to the M/A/N Map Workspace and any which could not be added and why. For example, libraries that already exist in your M/A/N Map cannot be added again [fig.18, #1]. The M/A/N Map Workspace is a holding area from which libraries can manage their M/A/N Map.

You can press Add and Proceed to M/A/N Map [fig.18, #2] to add the listed institutions to your Workspace and proceed to your M/A/N Map for updating.

One other option is to press Add and Return to Results [fig.18, #3] to add the listed institutions to your Workspace and return to your search results. You can continue searching and adding more institutions to the Workspace or proceed to other tasks. You can access your M/A/N Map at any time by selecting Institutions, then Update your Library.
Library from the DOCLINE navigation bar. The Workspace is retained even if you log out of DOCLINE.

If you decide not to add the chosen libraries to your M/A/N Map, press Cancel [fig.18, #4] to abandon the action.

**Printing and Downloading Search Results**

To print your search results, select the institutions to be printed by clicking in the check box next to the institution name. You can also select all institutions on the page by clicking the check box in the header bar next to the label LIBID or by clicking **Select All** at the bottom of the page [fig.15, #9]. Scroll to the bottom of the page to the Actions for Selected Institutions area and press **Print** [fig.15, #12]. Press **Close window** to close the secondary window.

To download your search results, select the institutions to be downloaded by clicking in the check box next to the institution name or select all institutions on the page by clicking the check box in the header bar next to the label LIBID or the clicking **Select All** at the bottom of the page [fig.15, #9]. Scroll to the bottom of the page to the Actions for Selected Institutions area and press **Download** [fig.15, #13].

On the Download Search Results window, select one of the three information views to download:

- Institution List
- Address
- Contact / People

On the File Download dialog window, select "Save this file to disk" and press OK. Choose the location where the file will be saved. Name the file or accept the default name. Press **Save**. Open the file in Excel and format as desired.
Serial Holdings

Serial Holdings contains information about the holdings of each DOCLINE library. You can use Serial Holdings to review and update your own holdings, but you can also use it to locate holdings for other libraries.

Using the Serial Holdings search interface

![Serial Holdings Update/View Screen](image)

**Fig. 19: Serial Holdings Update/View Screen**

The serial Holdings Add/Update and Search/View search screens are combined. By default the My Library box is checked [fig.19, #1]. To search for holdings for libraries in addition to your own, add filters by checking one of the popular search filters such as My Library Groups, My Region, My Routing Table, Not My Routing Table, My State/Province, or My Region [fig.19, #2]. Other filters include Volumes(s) Owned, Year(s) Owned, and LIBID(s) where individual LIBID(s) can be entered separated by either a space or a comma [fig.19, #3].

You can further refine your search by clicking on the Additional Filters link [fig.19, #4]. You can limit your search results by selecting from a list of Delivery Methods, Membership Information, and Interlibrary Loan Information, Holdings Formats, Location, and individual Library Groups. Links at the top of the page will take you to the desired.

Finally, you can also select Show All My Holdings [fig.19, #5] to view all of the holdings associated with your LIBID. The search results are listed alphabetically by publication name.

Using LocatorPlus to find unique identifiers

Serial Holdings is linked to LocatorPlus. If you do not know any of the identifiers for the journal you want to search, you can use LocatorPlus to find the journal and import the identifiers back into DOCLINE.
Fig. 20: LocatorPlus search interface

From the Update/View screen (Serial Holdings tab), click on the LocatorPlus button to display the LocatorPlus search interface. LocatorPlus offers a wide variety of searching options. One straightforward way to look up a specific citation for a known journal is to select the Journal Title [fig.20, #2] and enter the first few words in the Search: box [fig.20, #1]. Select the Search button to submit your search query [fig.20, #3]. From the results page, click on the link corresponding to the journal you want. You do not need to use the checkbox next to the title; this control relates to LocatorPlus functions that are not relevant to DOCLINE. By clicking on the journal title, the bibliographic record for that journal will be displayed. (If your search retrieved only one result, LocatorPlus will instead display the bibliographic record directly.) If the record displayed corresponds to the journal you want, select the Back to DOCLINE button [fig.20, #4] at the bottom of the display. The identifier and journal title will automatically appear on the Serial Holdings search screen.


Using Serial Holdings to add, remove or check holdings

You can add a title to your library’s Serial Holdings by searching in the Serial Holdings Update/View search form. In Filters, the box My Library will be checked by default. From the search results page, select the title that you would like to add or update in your holdings. To add a new title, follow the directions listed under Fig.21: Serials Holdings Add Form. To update an existing holding, follow the directions listed under Fig.22: Serial Holdings update form.
Adding Format

1. **Format**: Select the format (Text, Electronic Journal, Microform, or Other).

2. **Currently Received**: Choose whether or not you currently receive the title (Yes or No).

3. **Retention Policy**: Specify the retention policy (Permanently Retained or Limited Period Only).

4. **Add New Range**: Add additional rows for ranges.

5. **Completeness**: Select the completeness level from the drop-down menu.

The National Print Retention section is used by U.S. libraries only. Canadian DOCLINE participants should keep the default value: "No Commitment to retain title". Click Save to save the record.
Fig.22: Serial Holdings update form

After clicking on the title of interest, additional publication information will be displayed. Click Edit to continue on to the Serial Holdings update form [fig.22]. The Serial Holdings Update form is a populated version of the Add Holdings form [fig.21]. Review the instructions under Fig.21 to learn how to update the sections you are interested in changing. Once you have completed your changes, click on the Save button [fig.22, #1] at the bottom of the form.

Using Serial Holdings to search for journal holdings

You can use Serial screen to search for journal holdings. You can also use Serial Holdings Update/View screen even if the search is not limited to your library. To search other library holdings for a title, simple deselect My Library [fig.19, #1] and click Search. From the search results screen, select the title of the item you are interested in. The record display will include a list of LIBIDs for libraries that fall within the search limits you have specified. Selecting the LIBID will display the holdings information for that library. When displaying the holdings for a library that you do not have permission to update (in most cases, every library other than your own), the Add and Edit buttons will not be displayed.

Serial Holdings Report Overview

Each user with Serial Holdings update rights can submit a report. The reports will be current as of the time that they are run. To submit a report, select Reports from the Serial Holdings sub-menu. Select the report you want to submit. Reports are listed on the left side of the screen. Once you have submitted the report it is placed into a queue. Reports in the queue are run in order. The report should be available the following day.
unless there are a large number of reports that precede it in the queue. When the report is ready, you will see a Serial Holdings Report Ready message in the DOCLINE Homepage message area. Each report will be deleted from the DOCLINE system one week after it has been created even if the report has not been viewed.

There are multiple reports to choose from:

- Holdings by Library: A report of all holdings for a single library;
- Holdings not updated within One Year: A report that lists libraries that have not updated their holdings within One Year. A minimum of once a year, you should update the library holdings as necessary;
- Holdings Outside of Publication Date: A report that lists holdings that fall outside of the publication date range listed in the bibliographic record that is located in LocatorPlus;
- National Print Retention Titles enabling libraries to list the titles which they have committed to retain in print (Program for U.S libraries only).
- NLM Serial Title Changes: A report that identifies new holdings records created by NLM due to a title change that have not been updated by your library.

If your library is part of a Union List you can submit the following reports:

- Holdings by Library Group: A report of holdings for a library group that has been established in DOCLINE. Library Groups must have a minimum of eleven members that are DOCLINE libraries. You can view the holdings for library groups to which your library belongs;
- Holdings by Province: You can view the holdings for all libraries in your province.
Requests
The requests module is used to request articles or monographs from other libraries, to receipt, lend or reject requests received from other libraries and from Loansome Doc users, and to view the status of both requests you have created and those for which you are a potential lender. You can also retrieve reports containing statistics about your borrowing or lending history.

Creating and sending a request
To create a new request:

- Choose one of the request methods from the Requests/Borrow menu;
- Choose Unique Key if you already know the unique identifier for the monograph or articles you wish to request;
- Choose PubMed to locate citations for journal articles;
- Choose LocatorPlus to locate a citation for a monograph or a journal title;
- Choose Manual if you cannot find the citation information using any of the previous options and want to enter the information manually;
- Choose Transfer if you want to transfer a Loansome Doc request you previously receipted into the DOCLINE system.

Select the Requestor option if you want to enter a request on behalf of another DOCLINE library. You will normally use this option only in unusual circumstances, such as when a library cannot access DOCLINE temporarily and wants you to place a request on its behalf. You cannot place requests on behalf of libraries that are not DOCLINE participants.

Unique Key
If you know the PubMed or Medline Uls for the citations you want to request, or the ISSN, ISBN or other unique identifier for the monograph or journal title you want, the easiest way to create your requests is to use the Unique Key interface. You can enter up to eleven Uls corresponding to the article or articles you wish to request. Or you can select the identifier (NLM Unique ID, ISSN, ISBN, OCLC or Journal Title Abbrev.) and enter the corresponding text.
PubMed

Fig. 23: PubMed search interface

You can use PubMed to search for one or more journal citations and to import the citations back into DOCLINE. PubMed features many available search options. One straightforward way to locate a journal article is to enter some keywords in the search text box [fig.23, #1] and select the Search button [fig.23, #2]. A list of matching articles will display. Check the checkboxes corresponding to the articles you want to request [fig.23, #3] and in the Send to drop-down menu [fig.23, #4] select Order [fig.23, #5] and click the Order articles button. You will be returned to DOCLINE with the citations you have identified.

LocatorPlus

If you want to request a monograph, or if you cannot find a UI for a journal article you want, you can use LocatorPlus to find the monograph or journal citation. The method for selecting a journal or monograph is the same as it is when using LocatorPlus with Serial Holdings (see the section Using LocatorPlus to find unique identifiers). Once you have selected the item you want, click on the DOCLINE Order button at the bottom of the display to import the citation.

Manual

If you choose this option, the system will generate a blank citation input form; you will have to fill in all the necessary information manually.

If you input a request manually or obtain a citation for a monograph from LocatorPlus, DOCLINE will be unable to match the request to any holdings in Serial Holdings. Consequently, your request will route through your M/A/N map rather than your Routing Table.

Manual should be your last choice for placing requests in DOCLINE.

Loansome Doc Transfer

You may transfer a Loansome Doc request you have received but cannot fill into DOCLINE. When you do this, the Loansome Doc request becomes a DOCLINE request.
belonging to your library. You must not complete the request in DOCINE before transferring.

In the transfer research form, enter the number of the request you wish to transfer, or the patron’s name or email address. You can also retrieve a list of all pending Loansome Doc requests, by leaving the transfer search box empty and by clicking on the Show All button.

![Loansome Doc Transfer]

**Fig. 24: Loansome Doc to DOCLINE transfer display**

The Loansome Doc request or requests will display as a list. For all the requests listed, you may select whether they should be sent directly to the patron or to your library [fig. 24, #1]. You may view a request [fig. 24, #2] or quickly check the information displayed in the Request Info [fig. 24, #4], Patron [fig. 24, #5] and Holdings Info [fig. 24, #6] columns.

To transfer a request directly into DOCLINE, click on the Transfer Request hyperlink [fig. 24, #3]. The routing instructions page for your library will display. Below it, there will be an additional address form containing either your address or the patron’s address, depending on the delivery point you selected. You may modify the address and the routing instructions before completing the request. The request number will remain the same once transferred into DOCLINE. The request will route on your library’s routing table and be treated as any other DOCLINE request.

**Completing the citation and routing information**

Once you have identified one or more citations, you must supply some additional information before DOCLINE creates the request.

If you have identified one or more journal citations through PubMed or through the Unique Key interface, DOCLINE will display a list of the citations you have ordered. Each citation on the list will include a checkbox. To process all requests at once, click in all checkboxes and select the Next button. To process only some of the articles, first check the ones you wish to process. You can submit any number of requests in the same batch, as long as they are for the same patron and each request is to have the same comments, special instructions, maximum cost and so forth.
Articles requested as a batch will not all route to the same library. The purpose of processing articles as a batch is to speed up the request process by avoiding having to enter the exact same information for two or more different requests. Once input into the system, each request is treated individually.

If you have identified a journal or monograph citation using LocatorPlus or manual input, DOCLINE will display a citation input form [fig. 25]. You should complete all of the relevant fields. Not all fields may be relevant for your particular request.

At this point, you may complete the borrow request immediately, bypassing subsequent screens, by clicking the **FINISH NOW** button [fig.25, #2]. This will skip the Routing Instructions and Delivery Address pages. DOCLINE will use the default values from your Institution record Borrowing Preferences for pages skipped by **FINISH NOW**. A **Request Confirmation** will display.

If you wish to modify one of these default values for this request, click **Next** [fig.25 #1] instead.
DOCLINE will display the Routing Instructions form. This form will be pre-filled with the defaults from your routing profile in Institutions. You may fill in any blank fields or change any of the defaults before selecting the Next button to continue with the order.

The Authorized By field [fig.26a, #1] is required and should contain the name or initials of the person authorizing the request. All other fields are optional. The Patron Name field [fig.26a, #4] can be set as required in your institution borrowing preferences (Institutions > Update > DOCLINE Options > Borrowing Preferences). Usually, you will want to include at least a patron name to help you remember whom the request is for.

The Reason for Ordering drop-down menu (optional field) [fig.26a, #2] lets you indicate the reason for requesting this item. This provides statistical data about the ILL needs of participating libraries.

The Maximum Cost field [fig.26a, #3] is the amount you are willing to pay for ILL material. Enter a numeric value. If you need the material free of charge, enter "0.00". Select "Any cost" if your library is willing to pay any amount for ILL material. Remember if an U.S. library receives your request, it will assume that the maximum cost is specified in U.S. dollars.

Provide a Need No Later Than date [fig.26a, #5] if the request is not wanted after a particular date. If the request has not been filled, cancelled or receipted one day following the Need No Later Than date, DOCLINE will cancel it.

The Copyright Compliance field [fig.26a, #6] is intended primarily for U.S. borrowers (option of U.S. Law or U.S. Guidelines); Canadian participants within DOCLINE must comply with Canadian copyright law at all times.

The Comments field [fig.26a, #7] allows you to specify any special instructions or comments you may want a potential lender to see.
**Fig. 26b: Routing Instructions Form**

The **Service Type** [fig.26b, #1] and **Fill from Physical Format** [fig.26b, #2] fields let you specify your required document type: original, copy, color copy, electronic, text or any.

The **Service level** field [fig.26b, #3] allows you to choose Normal, Rush or Urgent Patient Care.

The **NLM Delivery Method** [fig.26b, #4], **Primary Network Delivery Method** [fig.26b, #5] and **Alternate Network Delivery Method** [fig.26b, #6] fields indicate how you want to receive the request if it is filled by a DOCLINE library or by NLM. The values you put in these fields affect how DOCLINE will route the request.
You can use the *Route to EFTS Participants only* field [fig. 26b, #7] if you want your requests to route to EFTS participants only; the receipt will indicate “Bill via EFTS only” in the *Bill to* section (see fig. 6).

If you want to prefix your request to a library, include its LIBID in the *Route to LIBID* field [fig. 26b, #8]. Use the Routing Cells [fig. 26b, #9], *Resource Libraries, NLM* and / or *All Other Libraries [fig. 26b, #10]* checkboxes to indicate where you wish to have your request routed through. For example, you could limit your request’s routing to libraries mentioned in the cell #3 of your routing table, by checking only the cell 3 checkbox. Clear all default values by clicking the *Clear All Routing Options* button [fig. 26b, #11].

The *Do Not Route to LIBIDS* field [fig. 26b, #12] allows you to exclude one or several libraries from the routing for this request.

For requests that cannot route on your normal Routing Table, your M/A/N map will instead be displayed. You may add to or change any of the LIBIDs in this map before continuing.

Click the *FINISH NOW* button [fig. 26b, #13] to complete the borrow request immediately, or click *Next* to update the delivery address.

If you are transferring a Loansome Doc request into DOCLINE, there will be a second delivery address form, which you can modify before selecting the *Finish* button.

When all information for the order has been entered, select the *Finish* button.

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**Fig. 27: Request confirmation display**

Once the transaction is completed successfully, the Request Confirmation page will display with the citation(s), the DOCLINE request numbers and the library to which the request routed [fig. 27]. If the request could not be placed, you will be informed of the problem with the request. Click *Return* to make necessary changes on the Routing Instructions page. Click the linked request number to view the request. You may wish to print a copy of this table for your records. You can use the *Return* button to return to the *Process Orders* display if you have any remaining orders to complete.

**How requests route**

If a request is sent using your M/A/N map, routing is very simple. Your M/A/N map consists of between zero and nine libraries. DOCLINE routes the request to each library in turn until the request is filled. It will route the request to NLM if none of the libraries in your M/A/N map can fill the request (or if your M/A/N map is empty) and you have checked *Route to NLM*.

If a request routes along your normal Routing Table, routing is more complex and depends upon many factors. A request sent using normal Routing Table would route
according to the following rules until a library fills the request or until an action that stops a request from routing takes place, such as a library rejecting your request due to cost:

- If you have included a LIBID in the Prefix LIBID field of the Routing Instructions form, the request will be sent to that library;
- If you have checked cell one on the Routing Instructions form, DOCLINE will create a randomly ordered list consisting of all of the libraries in cell 1 of your Routing Table. It will then remove any libraries, which according to Serial Holdings do not hold the volume or year of the journal you are requesting. If you selected anything other than Mail in the Network Delivery field, DOCLINE will also remove any libraries whose Institutions records do not indicate that they deliver via the requested method. DOCLINE will send the request, in turn, to each of the remaining libraries;
- The previous step is repeated for each of cells two through nine, if they have been checked in the Routing Instructions;
- If you checked Refer to Resource Libraries in the Routing Instructions, DOCLINE will create a random list of up to 20 U.S. Resource Libraries that report holding the title and volume or year and send the request to each of these;
- If you have selected Route to NLM in the Routing Instructions, the request will be sent to NLM;
- If you have checked Refer on After NLM in your Routing Instructions, DOCLINE will create a random list of 20 Resource Libraries that report holding the title and volume or year. The request will not be routed to any library that has already rejected it. If 20 libraries cannot be identified, DOCLINE will check the holdings of four libraries: American Hospital Association Library; American Dental Association Library; National Agricultural Library; and Canada Institute for Scientific and Technical Information.
- If the request is still not filled, it will be retired.

A single DOCLINE request could be routed to over 200 different libraries, so there is an excellent chance that your request can be filled if you set your maximum cost high enough and allow your request to route all the way through the system.

**Receiving and processing a request**

*Awaiting receipt* indicates that a request has routed to your library based upon the borrower’s routing instructions, your holdings, and your supported delivery methods. To receive any incoming DOCLINE or Loansome Doc requests, select the *Receipts* function of the *Requests* sub-menu. Then select the appropriate link from the receipt display. The system will display the incoming requests. You can use your Web browser's print feature to print copies of these requests. You can also receipt requests by clicking on the link that will appear on the DOCLINE Homepage when requests are waiting to be receipted. Requests will remain in your receipt queue until you acknowledge them or for one business. If you do not receipt within one business day, DOCLINE will automatically remove it and route to another potential lender.

Libraries can view a request without receipting it by navigating to Status/Cancel. Search by DOCLINE / Lend / All. The requests that have not been receipted will be listed under the Action column as *New, Rerouted TTA*, or *Rerouted Online*.

To lend or reject a request, select the *Lend* function of the *Requests* sub-menu. If you have both DOCLINE and Loansome Doc requests waiting to be acted upon, you must then select which group to process. Once a request has been receipted, you have three
business days in which to complete it. If it is not completed (marked as filled or not filled), DOCLINE will automatically remove it and route to another potential lender.

### Lend > DOCLINE

**Fig. 28: Batch Lending form**

The lend display allows you to manage requests by batch in the Batch tab or one at a time in the Single tab [fig. 28, #1].

If you want to handle several requests in the same way at once, enter the request numbers in the large text area [fig. 28, #2] of the Batch tab. If you have filled the requests according to the borrower’s instruction, select *Filled as Requested by Borrower* [fig. 28, #3]. If you have filled the order with an alternative delivery method, select the delivery method from the drop-down menu below *Filled via* [fig. 28, #4]. If you reject the requests, you must choose a reason from the *Rejected because* drop-down menu [fig. 28, #5].

You may switch to the Single tab to lend or reject requests one at a time. This allows you to fill different requests using different methods, or to reject requests for different reasons. Pending requests are displayed as a list. For each request, select the appropriate values from the *Action*, *Method/Reason*, *Type*, *Service Type* drop-down menus in the row.

To finish, select the *Update* button [fig. 28, #6]. The system will display a summary of the actions that have been taken for each request.

### Resubmitting retired unfilled requests

From the DOCLINE Home page, select the *DOCLINE requests were retired unfilled* link in the Messages area. There are six labeled columns of information: *Resubmit*, *Request #*, *Request Date*, *last Action*, *last Action Date* and *Patron name*. To view a request, click the request number under the *Request #* column. To view the history of a request, click on the action text (e.g. "Not Filled" or "Expired") under the *Action* column. Users are strongly encouraged to review the history of a request prior to resubmitting to help determine which values to modify during resubmit (e.g. Cost, Need by Date, etc.). To return to the Status/Cancel screen after viewing the request or routing history, click *Return*.

To resubmit a request, click on the request number or red arrow under the *Resubmit* column. The values displayed on the Citation Input, Routing Instructions, and Delivery Address pages are from the retired request. Review the citation of the retired request (non-PubMed requests only). As necessary, modify the citation on the Citation Input
screen. Click Next. Modify the routing instructions as necessary to maximize the chances of getting the request filled. Click Reset to apply your Routing Instruction values used in the retired request. Click Next. Review the delivery address and modify as necessary. Click Finish. A new request number is generated.

A request number can only be resubmitted once.

To resubmit retired unfilled requests from Status/Cancel under Request, enter the request number, or under Set search limits, select DOCLINE, Borrow, Retired from the drop-down boxes to create your search criteria (see fig. 29 and fig.30).

Once the list of retired requests is listed, follow the same instructions as above.

Checking the status of requests and canceling requests
You can view the full request or check the status of any request for which you are the borrower or the current potential lender. Being the current potential lender means that you have receipted the request and have not yet filled it, rejected it, or let it route on due to inaction. You can also cancel a request that you have created if you decide you no longer want it to be filled.

**Status/Cancel**

Enter request number(s), individual patron name or email address or search by type of request. Limiting by date range is recommended for filled and retired requests. Requests are available for 150 days after date of request completion.

Fig. 29: Status and Cancel Form

Selecting Status/Cancel from the Requests sub-menu will display the request search form.

You can search DOCLINE or Loansome Doc requests using the request number, patron name, or his/her email address [fig. 29, #1]. Click the Search button to retrieve all matching requests.

Otherwise, use the drop-down menus to select whether you want to find Loansome Doc or DOCLINE requests [fig.29, #2], and whether you want to look for requests for which you are the borrower or potential lender [fig.29, #3]. You can also limit your search to certain kinds of requests such as those which are pending or have been filled, or those which have been retired [fig.29, #4]. Next, you can select the date range of the requests, going back 40 days for Loansome Doc and 150 days for DOCLINE requests. Once you have completed your search criteria, select the Search button to retrieve all matching requests.
Fig. 30: Request Status screen

The system will display a table listing your requests and some additional information. You can modify the table display (sorting options and number of requests per page) at the bottom of the page [fig.30, #1]. Click Refresh to apply the modifications. Selecting a request number hyperlink [fig. 30, #2] will display the full request. In the Request Info column [fig.30, #3], you can read brief citation information to assist with identification of requests.

The status of the request is displayed under the Action column. Selecting the action code [fig. 30, #4] will display the routing history for that request. As mentioned in the paragraph above, you can resubmit a “Not Filled” request from this screen by clicking the Resubmit Request hyperlink, next to the request number [fig.30, #5].

To cancel requests, check each box corresponding to the request you want to cancel [fig.30, #6] and select the Cancel button at the bottom of the display [fig.30, #7]. Any request that is waiting to be receipted will be cancelled immediately. All other requests will be cancelled if and when the current potential lender rejects the request; if the lender fills the request, it will not be cancelled. It is suggested that you communicate with the potential lender to confirm the cancellation request [fig.30, #8].

**Statistical reports**

Selecting the Reports option from the Requests sub-menu will display a list of available statistical reports. Select the report that you wish to view from the list of available reports.
Loansome Doc patrons

Select Loansome Doc Patrons from the DOCLINE main menu to access the Loansome Doc patron utility. This utility allows you to search for and update the files of your Loansome Doc patrons. The Loansome Doc patron search interface works in a similar way to the Institutions search interface.

When you submit your Loansome Doc search, a summary of all matching records will be displayed. Included in this display are the patron’s last name, first name, user ID, and flags indicating whether the user is authorized and affiliated. Select any of these fields to view or edit the selected patron’s profile.

The patron information display contains some more detailed contact information, and also allows you to set or clear the affiliated patron and authorized patron status. If you set the Affiliated Patron flag, the word Affiliated will appear on all Loansome Doc requests created by this user, allowing you to recognize the user as being affiliated with your institution. If you clear the Authorized Patron flag, that user will no longer be allowed to send you Loansome Doc requests. When the user attempts to send a request, the system will respond to that user that he or she is not authorized to send Loansome Doc requests to your library.

You may select the Password button to view the user’s password.
DOCLINE is a complex system, and it can be difficult to remember everything you need to know to use all parts of the system. It can be especially difficult to remember the details relating to a part of the system that you do not use very often. Fortunately, a number of help resources are available.

**DOCLINE and NLM websites**

DOCLINE information: http://www.nlm.nih.gov/docline/


**NRC-CISTI Website**


**Mailing Lists**

The CANMEDLIB, RQBS and DOCLINE-L mailing lists are an important source of DOCLINE information and updates. All Canadian participants should be subscribed to one of these lists in order to keep up-to-date with DOCLINE news and events.

You can subscribe to DOCLINE-L from the listserv link from the left–hand menu on the DOCLINE home page.

You can subscribe to CANMEDLIB from the following Web page: http://www.chla-absc.ca/assoc/canmede.html.

You can subscribe to RQBS from the following Web page: http://biblio-sante.asted.org/sante/liste.html

**DOCLINE Team at NRC-CISTI**

The DOCLINE team at NRC-CISTI is available to support Canadian participants in the system and to provide assistance and training. Do not hesitate to contact us:

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