DOCLINE Manual

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DISCLAIMER: To obtain the latest DOCLINE information, please use the online Help files and FAQs from within DOCLINE. Also available at URL:

https://docline.gov

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Welcome to DOCLINE Help

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Copyright, Privacy, Accessibility
U.S. National Library of Medicine, 8600 Rockville Pike, Bethesda, MD 20894
National Institutes of Health, Health & Human Services

Getting Started

DOCLINE: General Overview

Overview

DOCLINE is the National Library of Medicine's (NLM) automated interlibrary loan (ILL) request routing and order referral system. The system provides efficient document delivery service by linking the holdings of member libraries and routing the ILL requests quickly throughout the National Network of Libraries of Medicine (NN/ LM).

Requests can be created, edited, routed, received, and filled in this system. DOCLINE participants can also check the status of requests for which they are either the borrowing or lending library. The online manual assists the user through the steps needed to accomplish these functions.

DOCLINE is available 24 hours a day, seven days a week. Some DOCLINE activities are suspended on U.S. national holidays. Scheduled maintenance is announced to subscribers of the DOCLINE-L email discussion list.

The dates and times used by the DOCLINE System are based on Eastern Time.

There is no charge for participating in DOCLINE. Interlibrary loan charges vary by Institution.

DOCLINE Home Page

The DOCLINE HOME Page is the first page that displays after logging into DOCLINE. The left side of the Home Page displays the institution name for the current session and DOCLINE information or notices.

You will find the following options at the top right of the page:

- **Help** - displays this online manual
- **FAQ** - displays DOCLINE Frequently Asked Questions
- **Contact Us** - opens a page of options for contacting DOCLINE customer service, NLM interlibrary loan service, or your Regional Medical Library (RML)
- **Preferences** - allows you to change the password for your DOCLINE account
- **Log Out** - always exit DOCLINE by using this Log Out link. Then you may close your browser window

Directly below is the DOCLINE navigation bar with the following tabs. Select a tab to display its submenu items. Tabs and submenu items will only display if user has rights to those functions.

- **Home** - *select to return to the DOCLINE Home Page*
- **Requests** - Borrow, Lend, Receipts, Reports, Status/Cancel, EFTS

- **Serial Holdings** - Update/View, Reports
- **Institutions** - Search, Update (*your LIBID*)
- **Loansome Doc Patrons**

Activity and Status Messages

In the "Activity and Status" area of the DOCLINE Home Page, you will find message links for incoming DOCLINE and Loansome Doc requests for your library, as well as notices regarding the status or action of requests still in process. Fourteen DOCLINE message links are possible and will appear in the order shown below. The message will only display if the condition applies to your institution.

1. **## requests awaiting RECEIPT**
Select this link to "receipt" and print new DOCLINE requests routed to your library.

2. **## Special Handling requests awaiting RECEIPT**
Select this link to "receipt" and print new DOCLINE requests routed to your library. Special Handling requests include Rush, Urgent Patient Care, and color copy requests.

3. **## Loansome Doc requests awaiting LD RECEIPT**
Select this link to "receipt" and print new Loansome Doc requests routed to your library.

4. **## requests will be removed overnight if not acted upon today (## Special Handling)**
Select this warning message link to view DOCLINE requests still in process at your library. If a request is received but not acted upon within three working days, DOCLINE automatically routes the request to another potential lender. If a Rush or Urgent Patient Care request is received but not acted upon the same day, DOCLINE automatically routes the request to another potential lender.

5. **Requests were removed this morning for non-action: ##, ##**
The requests listed in this message were removed from your library today for non-action and were routed to another library. You can no longer view or update them. After one business day, this message will be removed.

6. **Special Handling requests were removed this morning for non-action: ##, ##**
The Rush, Urgent, and color copy requests listed in this message were removed from your library today for non-action and were routed to another

library. You can no longer view or update them. After one business day, this message will be removed.

7. **## requests were retired unfilled (## Special Handling)**
Select this link to view your requests that retired as unfilled. Be sure to review carefully the History of the Request if you plan to resubmit it in order to determine what changes to make to the Routing Instructions. See Resubmitting retired unfilled requests. The Special Handling requests are marked with a red asterisk.

8. **## Transferred Loansome Doc requests were filled for the patron**
Select this link to view Loansome Doc requests which were transferred into DOCLINE by your library, filled by a lender, and shipped to the patron.

9. **## New Loansome Doc Patrons registered with your library**
Select this link to review the new patron(s). Select the "Reviewed" button on this page to remove the message from the Home screen. See **Managing Loansome Doc Patrons** for more information.

10. **## NLM Overdue Notices**
Select this link to view overdue notices for materials on loan to your library from NLM. Print the notices if needed and then select the "Acknowledge overdue notices (after printing)" button on this page to remove the message from the Home screen.

11. **## requests received awaiting completion (## Special Handling)**
Select this link to view DOCLINE requests received by your library, but not yet updated as filled or not filled.

12. **## Loansome Doc requests received awaiting completion (## still pending after 3 days)**
Select this link to view Loansome Doc requests received by your library, but not yet updated as filled, not filled, or transferred.

13. **## Serial Holdings Reports Ready**
Select this link to view completed Serial Holdings reports submitted by your library.

14. **Routing table is awaiting approval**
Your Regional Medical Library (RML) must approve new or revised tables before they become active. After your RML approves the table, your Routing

Table changes are then used by the routing algorithm, and the message will be removed.

15. **Out of office request is awaiting approval**
Your Regional Medical Library (RML) must approve requests by libraries to become temporarily inactive so that new lend requests do not route to your library. After your RML approves the request, your DOCLINE status will change on the dates requested, and the message will be removed.

Additional resources:

- DOCLINE system actions (Time-Triggered Actions)

Account information

DOCLINE participants receive one user account and password when they join. Additional user accounts may be requested if needed. Please Contact Your RML for assistance. User accounts should be secured to prevent unauthorized access to DOCLINE.

DOCLINE-L Email Discussion List

List Description
Join DOCLINE-L
List Guidelines
Posting Messages
List Commands (digest, nomail ...)
Getting Help
Regional discussion lists

List Description

DOCLINE-L is an email discussion list available from the National Library of Medicine (NLM). **DOCLINE-L is restricted to registered DOCLINE users.** The purpose of the discussion list is to provide NLM with a means of broadcasting messages to DOCLINE users. It also provides a forum for DOCLINE users to communicate with each other and with NLM about issues related to DOCLINE, Serial Holdings, or document delivery. The list is unmoderated; however, postings are limited to list subscribers. The DOCLINE-L Archives allow users to search list postings, modify subscription options, and post messages.
We recommend that all DOCLINE libraries also subscribe to their regional discussion lists for important regional announcements in addition to subscribing to NLM's DOCLINE-L (to receive messages affecting all DOCLINE users). Many DOCLINE announcements will be sent both to regional discussion lists and to the NLM DOCLINE-L list. If you are subscribed in both places, you may see some messages twice.

Join DOCLINE-L

To **subscribe** to the DOCLINE-L discussion list, please send the following text in the body of an email to: listserv@list.nih.gov

SUBSCRIBE *DOCLINE-L your name*

You will receive a confirmation message from the list management software. Once you respond to this acknowledgement message, you will receive a message from the DOCLINE Team welcoming you to DOCLINE-L. DOCLINE-L provides various subscription options which are set via list commands or through the DOCLINE-L Archives. Before posting for the first time subscribers should review the list guidelines.
To **leave** the DOCLINE-L discussion list, please send the following text in the body of an email to: listserv@list.nih.gov

SIGNOFF *DOCLINE-L*

To **change** your subscription address, go to
https://list.nih.gov/LISTSERV_WEB/chngaddr.htm

List Guidelines

Please read and follow the DOCLINE-L guidelines shown below before posting messages to the list. The guidelines establish a common understanding of expected subscriber conduct and of list content. These guidelines do not replace common sense, professionalism, and respect for your fellow subscribers.

Do	Do Not
Read the DOCLINE FAQs and Online Manual prior to posting a question.	Post ILL requests. Use DOCLINE to request ILL material.
Search the list archives prior to posting a question.	Post temporary closure notices. Use the DOCLINE Hold Request form to prevent requests from routing to your institution.
Identify yourself and your institution. Include your full name, title, email address, institution name, and institution's LIBID in your posting.	Include signature attachments, as many email systems cannot properly view them or will strip them.
Be concise.	Ask if system is down. Please use Contact DOCLINE or call 888-FINDNLM (301-594-5983).
Use **descriptive subject lines**. When replying, edit the original subject line as necessary.	Report specific problems. Please use the Contact DOCLINE form to document a possible problem with DOCLINE.
Keep **messages within the scope** of this list.	Post conference announcements, advertisements, or job postings.
When replying, include only those parts of the message to which you are replying.	Post messages containing defamatory, abusive, profane, offensive language or illegal material.
Send personal replies to the individual, not to the entire list. Personal replies include messages like "Thank You," "I agree," "Good point."	Post materials protected by copyright without the permission of the copyright owner.
Remember that your fellow	Use 'auto-reply' for list postings as

Do	Do Not
subscribers are human. Be tolerant of mistakes.	these may be distributed to all subscribers. Use the 'nomail' feature or set your 'auto-reply' so that list postings do not receive the auto-generated message.
Summarize responses to the list. When posing a question to the list, ask for personal responses and then summarize answers to the list.	Post test messages to the list.
Send messages in plain text only. Some email systems cannot properly display HTML or Rich Text messages.	

Posting Messages

To post messages to DOCLINE-L, use the address: docline-l@list.nih.gov
Subscribers may also post messages directly from the DOCLINE-L Archives.
Note: Posting to the list is restricted to subscribers of the DOCLINE-L list. Subscription is based solely on your email address from which you subscribed as it appears in the From: address of your sent messages.

List Commands

The following are some of the most commonly used commands for LISTSERV subscribers. When using these commands always:
Send the command(s) in an email message addressed to: listserv@list.nih.gov
Type the command(s) in the **body** of the message with no subject line.
If you are sending more than one command in the message, use one line for each command.

Command line	Action
SUBSCRIBE *DOCLINE-L your name*	» subscribes you to the list specified
SIGNOFF *DOCLINE-L*	» removes you from the specified list
SET *DOCLINE-L* NOMAIL	» stops incoming mail from specified list
SET *DOCLINE-L* MAIL	» restarts mail from the list

SET *DOCLINE-L* DIGEST	»	subscriber receives a digest of messages
SET *DOCLINE-L* NODIGEST		messages are received as they are posted
SET *DOCLINE-L* ACK	»	sends confirmation when you post to the list
SET *DOCLINE-L* NOACK		cancel confirmation messages
HELP	»	retrieves a list of LISTSERV® commands
QUERY *DOCLINE-L*	»	retrieves your current subscription settings

Getting Help

- For questions about the DOCLINE-L list or for help subscribing, unsubscribing, or submitting to a list , contact the listowner at:
  docline-l-request@list.nih.gov
- For resources and assistance for NLM-hosted lists, go to:
  http://www.nlm.nih.gov/listserv/resources_assistance.html
- For general LISTSERV questions, contact the NIH LISTSERV administrators at:
  listmaster@list.nih.gov
- For questions or problems with DOCLINE, use the Contact DOCLINE or Contact RML feature within DOCLINE or go to

  Getting and Using Help - Contact Us page

Regional discussion lists

Instructions for subscribing to your regional discussion lists can be found at:
Region 1: http://nnlm.gov/mar/services/listserv.html
Region 2: http://nnlm.gov/sea/about/informed.html
Region 3: http://nnlm.gov/gmr/about/lists.html
Region 4: http://nnlm.gov/mcr/services/comm/mcmla.html
Region 5: http://nnlm.gov/scr/services/listserv.html
Region 6: http://nnlm.gov/pnr/hlib-nw.htm
Region 7: http://lists.ucla.edu/cgi-bin/mailman/listinfo/psr-news/
Region 8: http://nnlm.gov/ner/newsletter/5/listsandmorelists5.html
Region 20: http://www.chla-absc.ca/node/53 (English)
Region 20: http://www.chla-absc.ca/node/54 (French)

Technical Setup

DOCLINE: System Requirements

The minimum system requirements for DOCLINE are:

- A stable Internet connection (28,800 bps or faster modem, or a direct connection).
- Screen resolution of 1024 x 768 or higher with small fonts is strongly recommended (800 x 600 minimum).
- Windows 2000 / XP / 7. (At this time, NLM does not support the Macintosh platform.)
- Internet Explorer 7.x or Internet Explorer 8.x and Firefox
- Firewall Settings:

  - FTP (File Transfer Protocol) enabled with the ability to view hidden sub-directories turned on (only if access to Serial Holdings reports is needed).
  - "Passive Transfer" feature of FTP enabled (only if access to Serial Holdings reports is needed).

All DOCLINE users must have access to the Internet to use the system. Your Regional Medical Library (1-800-338-7657) can assist you in getting Internet access.

Cookies

A "cookie" is information sent by a web site server (e.g. DOCLINE) to your computer while you are connected to that site. DOCLINE's cookies are information about your interactions that may be needed later for the system to perform a function. As the user moves from page to page in DOCLINE, cookies allow his/her own specific Institution, Serial Holdings, and transaction records to be retrieved. Any cookies placed by DOCLINE will be deleted from your computer when you exit your browser.

Further information about cookies can be found at http://www.cookiecentral.com/

Macintosh

At this time, NLM does not support the Macintosh (Mac) platform for DOCLINE. Unlike other NLM systems, DOCLINE is not a public system; it is closed to all but DOCLINE users. Given the range of variations in environments introduced by the Mac, NLM cannot currently give adequate time and attention to critical testing and support required to ensure proper system performance.

If you have a Mac and have used DOCLINE successfully, there is no reason why you cannot continue to do so. However we do not recommend the purchase of Macs specifically for use with DOCLINE, nor can we provide the technical support for existing Macs in the network.

DOCLINE: Configuring my browser

Browser Settings

NLM actively tests and supports Internet Explorer 7.x and Internet Explorer 8.x for use with DOCLINE. Firefox is also supported, however due to the Firefox accelerated release schedule we are only able to certify the version that is current at the time of major DOCLINE releases.

Please note that each browser version (major and minor releases) may have specific issues which NLM cannot always address. If you install a later browser version, **please be sure to maintain one of the supported browsers** in order to ensure access to DOCLINE.

Institutions accessing DOCLINE from behind a firewall should review the FAQ about firewalls (http:// www.nlm.nih.gov/services/ doc_firewall.html).

Settings for DOCLINE:

- Firefox
- Internet Explorer 7.x
- Internet Explorer 8.x

Barcodes on DOCLINE and Loansome Doc Requests

DOCLINE provides a machine-readable version of the request number to facilitate volume processing. To display and print barcode numbers, you must have the 3 of 9 Barcode font installed in the Windows Fonts directory of your PC.

Once the barcode font is installed, barcode numbers will automatically display and print on DOCLINE requests.

Note: Displaying barcode numbers is optional. Without the barcode font installed, the request number displays as:

*** 4191 ***
Request # 4191

To download the 3 of 9 Barcode font, please follow these instructions.

For ***Internet Explorer***:

- Right-click on the following link: Download Barcode Font
- From the menu, select "Save Target As."
- Your browser will open a "Save As" dialog box.
- In the "Save As" dialog box, go to the Windows Fonts directory (normally c:\windows\fonts or c:\winnt\fonts), then select Save.
- The font will be saved as file name "3of9.ttf." The font name is "3 of 9 Barcode."

Depending on your operating system (O/S), you may need to perform an additional step to install the font. Please refer to your O/S documentation for further details.

For ***Firefox***:

- Right-click on the following link: Download Barcode Font
- From the menu, select "Save Link As..."
- Your browser will open a "Save As" dialog box.

- In the "Save As" dialog box, go to the Windows Fonts directory (normally c:\windows\fonts or c:\winnt\fonts), then select Save.
- The font will be saved as file name "3of9.ttf." The font name is "3 of 9 Barcode."

Depending on your operating system (O/S), you may need to perform an additional step to install the font. Please refer to your O/S documentation for further details.

To see if your font has been installed correctly, view the Barcode Font Test page.

Getting and Using Help

Ways to get assistance

This online manual contains the complete help documentation for DOCLINE. To scroll through a table of contents for Help, click the **Contents** button. When you want to search for words or phrases, click the **Index** button. The online manual also includes a keyword search feature and a glossary of terms.

Other ways to get assistance include:

Regional Medical Library / CISTI - The Regional Medical Libraries (RMLs) provide DOCLINE training and user assistance in the eight geographic regions of the National Network of Libraries of Medicine (NN/LM). The Canadian Institute for Scientific and Technical Information (CISTI) provides services for Canadian libraries.

Send a question or comment to your regional DOCLINE coordinator by using the Contact RML page.

Frequently Asked Questions (FAQs) - Here are the answers to the most commonly asked questions about DOCLINE.

DOCLINE Customer Service

For assistance with DOCLINE, please contact **NLM Customer Service**

- **By Web Form:**
  From within DOCLINE, select "Contact Us" at the top of the page. After the Contact DOCLINE page displays select the link appropriate to your needs. The Contact DOCLINE form is also available outside of DOCLINE.
- **By Email:** custserv@nlm.nih.gov
- **By Phone:**
  - Within the U.S.: (888) 346-3656; press 2
  - From outside the U.S.: (301) 594-5983; press 2
- **Customer Service hours are:**
  Monday - Friday: 9:00 A.M. - 5:00 P.M., ET

NLM Customer Service Policy

DOCLINE-L - DOCLINE-L is an email discussion list that provides NLM the ability to broadcast messages about DOCLINE. It also provides a forum for DOCLINE users to communicate with each other and NLM about DOCLINE.

Training

DOCLINE training is available to all participants. Some training materials are available online. Training by phone, web-conference or in-person can be arranged with your regional DOCLINE coordinator.

United States: The Regional Medical Libraries (RMLs) provide DOCLINE training and user assistance in the eight geographic regions of the National Network of Libraries of Medicine (NN/LM). Send a question or comment to your regions to your Regional Medical Library by using the Contact RML page or call 1-800-338-7657.

Canada: The Canada Institute for Scientific and Technical Information (CISTI) provides training services for Canadian libraries. Send a question or comment to your CISTI DOCLINE coordinators by using the Contact RML page or by calling 1-800-668-1222.

Mexico: The Region 5 RML at the Houston Academy of Medicine Texas Medical Center will coordinate training and holding data collection during the start up period. The contact is Ruicha Mishra: docline@exch.library.tmc.edu. The Centro de Información Para Decisiones en Salud / CENIDS in Tlalpan, Mexico is the official MEDLARS Center for Mexico. For questions or assistance, please contact the Houston Academy of Medicine Texas Medical Center Library at 1-713-799-7880 or send an email to docline@exch.library.tmc.edu.

Other International Countries: International DOCLINE libraries can utilize the online resources to learn DOCLINE. If libraries need further assistance, please send your questions to NLM via the Contact DOCLINE web form.

Ask a question

- Ask a Question about using DOCLINE
  Send NLM a question about DOCLINE or Contact your RML.

- General Comments
  Send NLM a comment about DOCLINE.

- Suggest a DOCLINE Enhancement
  Send NLM your ideas about enhancing future versions of DOCLINE.

Report a problem

- Report a Problem with DOCLINE
  Notify us if you believe you have encountered a bug in DOCLINE.

- Contact Interlibrary Loan (ILL)
  Report a problem with ILL requests filled by NLM.

Borrowing

Borrowing Overview

DOCLINE provides users the ability to order copies of biomedical literature using a variety of methods depending upon the citation information available and the material being requested. DOCLINE also allows users to request the loan of materials from their ILL partners.

What do you want to do?

- Order using a PMID
- Order using a MEDLINE UI
- Order using an OLDMEDLINE UI
- Order by searching PubMed
- Order by NLM Unique ID
- Order by ISSN
- Specify Fill from physical format
- Order by ISBN
- Order by Journal title abbreviation
- Order by OCLC number
- Order by searching NLM's OPAC
- Order by manually entering citation information
- Complete the routing instructions page
- Set Do Not Route to list
- Use FINISH NOW
- Contact Library
- Request the loan of an item
- Request the loan of material not in NLM's OPAC

Completing the Routing Instructions Page

The routing algorithm uses the information provided on the Routing Instructions page to determine where requests will route. Most of the values displayed are taken from the defaults set in your library's institution record. Routing Instructions can be modified on a request by request basis.

Field	Options / Description
Request Information	
Authorized By	Lists staff information indicating who authorized the placing of the request.
Reason for Ordering	Indicates the reason the borrower needs to request the item. Provides statistical data about the ILL needs of participating libraries. Optional, but recommended.
Maximum cost	Indicates the maximum amount the borrower is willing to pay for the ILL request. Cost is not used in determining routing.
Patron Name	Lists the patron name for reference upon delivery of item. Most lenders include a copy of the request with the delivered material. Optional.
Need No Later Than	Expiration date for request. Date is checked at every reroute. If request is at received status when date passes, the lender can still fill the request. If the lender rejects the request, DOCLINE will then retire the request as Expired. Optional.
Copyright compliance	**Guidelines** - indicates that the borrower's ILL request complies with U.S copyright law under Section 108, including items borrowed within the CONTU Guidelines "Suggestion of Five" **Law** - indicates that the borrower's ILL request complies with copyright law by being a "Fair Use" under Section 107 of the U.S. law or your country's equivalent of "Fair Use", paying royalties to copyright holder directly or through an agent such as Copyright Clearance Center (CCC); or requested item is not

Field	Options / Description
	covered by copyright **Important**: NLM cannot advise libraries on copyright law. Please refer to your institution's legal counsel, the United States Copyright Office or your country's copyright law.
Delivery and Routing	
Service Type	**Copy** - request for reproduction of specific article, chapter **Color Copy** - request for reproduction copy in color. Request will only route to libraries reporting they can provide copies in color **Original** - loan of journal volume, monograph, or A/V
Fill from Physical Format	Indicates borrower's choice for physical format of the journal from which to fill request. Default is "Any" physical format.
Service Level	**Normal** - request will be processed as part of lender's normal ILL processes. **Rush** - lender should process request the same day **Urgent Patient Care** - lender should process and ship request immediately. Lenders should check for new requests at least every 2 hours. See Time-triggered Actions for rules on when requests will reroute for each service level.
NLM Delivery Method	Indicates delivery method to be used by NLM (MDUNLM, MDULMF, and MDUHMD) for copy requests. See FAQ for NLM's preferred delivery method.
Primary Network Delivery Method	Indicates borrower's preferred delivery method of a copy request for DOCLINE libraries (not NLM).
Alternate Network Delivery Methods	Indicates borrower's acceptable alternate delivery methods for a copy request for DOCLINE libraries (not NLM). Optional.
Only Route to EFTS Participants	If checked, request will only route to institutions that are members of the Electronic

Field	Options / Description
	Fund Transfer System. Optional.
Route to LIBID (Prefix)	If a valid LIBID is entered, request will route first to this library if the library meets other routing instructions. Holdings are not considered. Optional. Limit of one (1) LIBID.
Routing Cells	Indicates which of the borrower's Routing Table cells will be used during the routing of a request. Checking of individual cells is optional.
Resource Libraries	Determines whether the routing algorithm will attempt to route the request to Resource Libraries meeting the routing instructions. Optional.
NLM	Determines whether the routing algorithm will route the request to NLM (MDUNLM, MDULMF, and MDUHMD) during routing. Optional.
All other libraries	Determines whether the routing algorithm will attempt to route the request to additional Resource Libraries, Primary Access Libraries, and Other libraries. Optional.
Routing Exceptions	
Do Not Route to LIBIDs	Used to prevent requests from routing to individual libraries in Library Groups in Routing Table, Resource Libraries, or "All Other Libraries"; or to temporarily prevent requests from routing to lenders listed individually in serial routing cells. Optional. Limit of twenty (20) LIBIDs.

Additional resources:

- DOCLINE system actions (Time-triggered Actions)
- Routing of serial requests
- Routing of monographs and non-NLM serial requests
- Setting the default values used to route new requests

Finish Now

The **FINISH NOW** button allows the user to complete a Borrow request immediately, bypassing subsequent request screens. For example, a borrower can modify their Routing Instructions, but skip the Delivery Address page by clicking **FINISH NOW** on the Routing Instructions page after making desired changes.

For pages skipped by selecting **FINISH NOW**, DOCLINE will use the default information from the Borrowing Preferences in the library's Institution record for Borrow screens (Routing Instructions and/or Delivery Address).

Note: If default values for required fields, such as "Authorized by" and "Maximum Cost", have not been established in the Borrowing Preferences section of the Institution record, the user will be required to fill out this information before the request is placed.

Additional Resources:

- Completing the Routing Instructions page
- Setting the default values used to route new requests

Transferring Loansome Doc requests

Libraries may transfer unfilled Loansome Doc requests into DOCLINE if they are unable to fill the request from their own collection. Library Policy will dictate whether you transfer a specific request (e.g., patron's max cost or copyright compliance issues), or whether you transfer any requests for a particular Loansome Doc patron type (e.g., unaffiliated users).

STEP	Action
1	Select **Requests** from the DOCLINE Main Menu.
2	Select **Borrow**.
3	Select **Loansome Doc Transfer**.
4	Select the **Show All** button to retrieve all pending requests *Or* Enter a specific Loansome Doc request number, or all or part of a patron name or email address and click **Search**.
View	Pending Loansome Doc request(s) are displayed. The citation is shown, and if an item is available free online in PubMed Central or through a publisher site, a "FREE" icon and link appears. If your library reports holdings for the title, a message is displayed. The patron's name and patron type are displayed. Patron status is also displayed if "Not authorized".
5	Select "Patron" or "Library" as the **Ship Request To** delivery destination. **Note:** If **Ship to Patron** is selected, the patron's delivery address and delivery method are displayed. If **Ship to Library** is selected, the library's default delivery method and alternate delivery methods are displayed.
6	Click the **Transfer Request** link for the specific request to initiate the transfer.
7	Review and complete the **Routing Instructions** page. Click **NEXT** or **FINISH NOW**. **Note:** The max cost value is taken from the amount

STEP	Action
	specified in the patron's request.
8	Review the **Delivery Address** page. Update as necessary.
9	Click **FINISH**.
10	Once the transaction is completed successfully, the **Request Confirmation** page will display with the citation, the DOCLINE request number and the library to which the request routed. If the request cannot be routed to any library per your routing instructions and available holdings, you will be notified on a new page. Select **Return** to make necessary changes on the "Routing Instructions" screen.
11	Select **Return** to transfer another Loansome Doc citation from the remaining list.

Additional Resources:

- Completing the routing instructions page
- Routing of serial requests

Do Not Route to: preventing requests from routing to particular lenders

The **Do Not Route To** list may be used to prevent requests from routing to individual libraries in Library Groups in a Routing Table, Resource Libraries, or "All Other Libraries"; or to temporarily prevent requests from routing to lenders listed individually in Routing Table cells.

Borrowers can prevent their requests from routing to a specific member of a Library Group in their Routing Table by adding the LIBID to the **Do Not Route To** list. This can be done for an individual request during the Borrow process, or with a default list of Do Not Route To LIBIDs in the Borrowing Preferences, Serial Routing section of the Institution record.

Note: Users wanting to permanently prevent requests from routing to libraries listed individually in their Routing Instructions should remove the LIBIDs from their Routing Table or M/A/N Map rather than using the Do Not Route To feature.

Additional Resources

- Routing of serial requests
- Routing of monographs and non-NLM serial requests
- Routing by physical format
- Completing the Routing Instructions page

Contacting Other Libraries

There are two ways to send a message to another library from within DOCLINE; the "Contact Library" feature in DOCLINE Requests, and the ILL Contact links in each library's Institution record.

STEP	Action
To contact a library about a specific request:	
1	Select **Requests** from the DOCLINE main menu.
2	Select **Status/Cancel**
3	Retrieve your request(s) by entering the request number(s), patron name or email address in the **Request # or Patron** box *OR* under **Define Search Limits** select search criteria, (e.g., "DOCLINE" or "Loansome Doc", "Borrow" or "Lend"), choose request status (e.g., "Pending", "Filled") and set the date range you wish to search within. Requests are available for 150 days from date of Final Action (filled or rejected). Click **SEARCH**.
View	Request data is displayed in the following columns: **Request #**, **Request Info**, **Action Date**, **Action** and **Institution**. Requests can be sorted **Oldest** to Newest, **Newest** to oldest, by **Action**, **Patron Name**, **Institution** or **Service Level**. To change sorting, select **Sorted By** at the top of the page, and make selections under **View Options**. Click **REFRESH**.
4	Select the corresponding **Contact Library** link for the desired request.
5	In the resulting Contact Library form, fill in your contact information and the message text. The form is automatically addressed to all ILL Contacts listed in the recipient libraries' Institution record and the selected request number is inserted into the subject line.
6	Click **Send**.
Note: This message is not retained within the DOCLINE System, nor will you receive a copy of it, unless you select "Send copy to my email address".	

STEP	Action
To email an individual at another library:	
1	Select **Institutions** from the DOCLINE main menu.
2	Enter the LIBID, Institution Name, or Contact Name in the designated boxes or click on the More Search Options button to build your search.
3	Click **SEARCH**.
4	Click on the Institution name link for the desired library. The library's information will display in "Interlibrary Loan" view; this view includes ILL contact information. To view all staff listed in DOCLINE for the library, in the **View Options** area, select "Contact/People" and click **REFRESH**.
5	Click on the email address shown for the desired contact. Depending on your local email system, this will insert the email address into a new blank email.
6	Compose your email and send.

Additional resources:

- Finding an institution record by library contact name
- Finding an institution record by institution name
- Canceling a request
- Finding the status of a request

Routing by Physical Format

Borrowers can choose the physical format of the journal from which they want their requests filled. They may choose “Electronic”, “Text” or “Any” in the Fill from Physical Format field in the "Routing and Delivery" section of Borrow requests. The default is fill by “Any” physical format.

If the borrower selects “Electronic” or “Text”, DOCLINE will only route the requests to lenders who report owning the specified format. “Electronic” format matches the holdings format of ‘cr’ (electronic resource, remote). “Text” will match the serial holdings formats beginning with ‘t’ so Text; Text, Other, etc.).

Note: requests will automatically default to Electronic format for “Epub ahead of print” articles if ***every*** *citation on the Citation page* is “Epub ahead of print”.

Additional Resources:

- Completing the routing instructions page
- Routing of serial requests
- Routing of monographs and non-NLM serial requests.

Transferring Loansome Doc requests

Libraries may transfer unfilled Loansome Doc requests into DOCLINE if they are unable to fill the request from their own collection. Library Policy will dictate whether you transfer a specific request (e.g., patron's max cost or copyright compliance issues), or whether you transfer any requests for a particular Loansome Doc patron type (e.g., unaffiliated users).

STEP	Action
1	Select **Requests** from the DOCLINE Main Menu.
2	Select **Borrow**.
3	Select **Loansome Doc Transfer**.
4	Select the **Show All** button to retrieve all pending requests *Or* Enter a specific Loansome Doc request number, or all or part of a patron name or email address and click **Search**.
View	Pending Loansome Doc request(s) are displayed. The citation is shown, and if an item is available free online in PubMed Central or through a publisher site, a "FREE" icon and link appears. If your library reports holdings for the title, a message is displayed. The patron's name and patron type are displayed. Patron status is also displayed if "Not authorized".
5	Select "Patron" or "Library" as the **Ship Request To** delivery destination. **Note:** If **Ship to Patron** is selected, the patron's delivery address and delivery method are displayed. If **Ship to Library** is selected, the library's default delivery method and alternate delivery methods are displayed.
6	Click the **Transfer Request** link for the specific request to initiate the transfer.
7	Review and complete the **Routing Instructions** page. Click **NEXT** or **FINISH NOW**. **Note:** The max cost value is taken from the amount specified in the patron's request.

STEP	Action
8	Review the **Delivery Address** page. Update as necessary.
9	Click **FINISH**.
10	Once the transaction is completed successfully, the **Request Confirmation** page will display with the citation, the DOCLINE request number and the library to which the request routed. If the request cannot be routed to any library per your routing instructions and available holdings, you will be notified on a new page. Select **Return** to make necessary changes on the "Routing Instructions" screen.
11	Select **Return** to transfer another Loansome Doc citation from the remaining list.

Additional Resources:

- Completing the routing instructions page
- Routing of serial requests

Ordering material on behalf of another library

The purpose of Requestor is to enable a DOCLINE library to enter requests on behalf of another library. The requesting library must have a record in Institutions, but they may or may not be a DOCLINE participant.

To change the name of the Requesting Library:

STEP	Action
1	Select **Requests** from the DOCLINE Main Menu.
2	Select **Borrow**.
3	Select **Requestor**.
4	Click in box labeled "Requestor LIBID", highlight and delete LIBID shown.
5	Type in LIBID of library for which request is being made.
6	Click **Change**.
View	The inputting library will receive a message indicating the LIBID and name of the requesting library for which they are entering requests. If the requesting library is an active DOCLINE participant, the ILL contact and phone number will be displayed.

Requesting copies of PubMed material

Ordering by searching PubMed

Requesting articles through the PubMed interface within DOCLINE can be easily done by following the step in the table below:

STEP	Action
1	Select **Requests** from DOCLINE Main Menu.
2	Select **Borrow**.
3	Select **PubMed**.
4	Perform PubMed Search(es).
5	Click checkbox to the left of each citation you want to Order.
6	Select **Order**, then **Order articles** from the [Send to] drop-down menu (skip to step 9). **OR** Select **Clipboard** from the [Send to] drop-down menu to save citations to order. **Note:** You may perform multiple searches and save citations to Clipboard.
7	Select **Clipboard** items links to view saved citations.
8	Click checkbox to the left of each citation you want to order. Select **Order**, then **Order articles** from the [Send To] drop-down menu. **OR** Select **Order**, then **Order articles** from the [Send to] drop-down menu to order all citations displayed on page. **Note 1:** Clipboard is **not** cleared after ordering. Citations are removed from Clipboard after 8 hours of inactivity in PubMed. **Note 2:** To remove citations that are not wanted, click check-boxes to the left of the citations, then select **Remove selected items**.
9	Review "Citations" page in DOCLINE. Sort the list if desired.

STEP	Action
10	Click check-box to the left of each citation you want to order. Click **NEXT** or **FINISH NOW.** **OR** Click **NEXT** or **FINISH NOW** without checking any boxes to order all displayed.

Additional Resources:

- Completing the routing instructions page
- Routing of serial requests

Ordering with PMID

To request materials using a PubMed ID (PMID), do the following:

STEP	Action
1	Select **Requests** from the DOCLINE Main Menu.
2	Select **Borrow**.
3	Enter up to 11 PMIDs in the **Order PubMed citations** field. Separate each PMID with a comma or a space. Click **SEARCH**.
4	Select check-boxes on "Citation" page to order specific selections and click **NEXT** or **FINISH NOW** *OR* Click **NEXT** or **FINISH NOW** to order all documents. Sort the list first if desired.
5	Review and modify the information on "Routing Instructions" screen as necessary. Click **NEXT** or **FINISH NOW**.
6	Edit delivery address on "Delivery Address" screen as needed.
7	Click **FINISH** to complete your order request. **Note:** Click **PREVIOUS** to return to the previous Borrow input screen.
8	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. If the request cannot be routed to any library based on your routing instructions, you will be notified on a new page. Click **Return** to make necessary changes on the "Routing and Delivery" section of the "Routing Instructions" screen.
9	Click the linked request number to view an individual request **OR**

STEP	Action
	Click **FULL DISPLAY** to view all of the items requested.
10	To print the request once you have displayed the items, use your browser's print feature.
11	Click **RETURN** to continue ordering any remaining citations.

Additional Resources:

- Completing the routing instructions page
- Routing of serial requests

Requesting copies of non-PubMed material

Ordering materials with a Unique ID (UI)

Requesting copies of non-PubMed material

To request materials from LocatorPlus using a unique key value, do the following:

STEP	Action
1	Select **Requests** from the DOCLINE Main Menu.
2	Select **Borrow**.
3	Under **Order LocatorPlus**, choose from "Select key" drop-down box for from **LocatorPlus** **NLM Unique ID** (OPAC record number) **ISSN:** International Standard Serial Number **ISBN:** International Standard Book Number **OCLC:** OCLC record number. Must be at least 8 digits; for example, "01641120". **Full Title/Title Abbrev:** Complete monograph or serial title / Designated NLM journal title abbreviation **Truncated Journal Title / Title Abbrev:** Journal Title / Title abbreviation search with wildcard automatically appended at end of search term. For example, " *cell*" will retrieve titles beginning with "cell", "cellular", "cellulose", etc.) **Note:** NLM Unique ID includes the old TCN or Serial Holdings SEQ Number.
4	Enter one (1) LocatorPlus UI. Click **SEARCH**.
5	Complete citation information as completely as possible in "Citation Input" form. Click **NEXT** or **FINISH NOW**.
6	Review and modify the information on "Routing Instructions" screen as necessary. Click **NEXT or FINISH NOW.**

STEP	Action
7	Edit delivery address on "Delivery Address" screen as needed.
8	Click **FINISH** to complete your order request. **Note:** Click **PREVIOUS** to return to the previous Borrow input screen.
9	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. If the request cannot be routed to any library based on your routing instructions, you will be notified on a new page. Click **Return** to make necessary changes in the "Routing and Delivery" section of the "Routing Instructions" screen.
10	Click the linked request number to view the request.
11	To print the request once you have displayed the item, use your browser's print feature.

Additional Resources:

- Completing the routing instructions page
- Routing of serial requests
- Routing of monographs and non-NLM serial requests

Ordering materials by searching NLM's OPAC (LocatorPlus)

To request copies of materials by searching LocatorPlus, do the following:

STEP	Action
1	Select **Requests** from the DOCLINE Main Menu.
2	Select **Borrow**.
3	Select **LocatorPlus**. **Note:** You may order one (1) title at a time from **LocatorPlus**.
4	Perform **LocatorPlus** search: **Search Tips**: **Keyword Anywhere** is search default. Use as many specific words as you have from the title, author, or any part of the record. Select **Title/Subject/Author** search if you know the exact title or author Refer to the **LocatorPlus** help for further searching tips.
5	If your search retrieves more than one (1) record: Click on the title you want. **Note:** Do **NOT** use check-boxes to the left of the title to make an order. Those check-boxes are for marking to print or save a **LocatorPlus** record.
6	Click on **DOCLINE Order** (highlighted in gold bar) at the bottom of the screen.
7	Complete the "Citation Input" screen.
8	Click **NEXT** or **FINISH NOW**.
9	Review and modify the information the "Routing Instructions" and "Delivery Address" pages as necessary. Click **NEXT** or **FINISH NOW**.
10	Click **FINISH** to complete your order.
11	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. If the request could not be placed, you will be informed of

STEP	Action
	the problem with the request. Click **Return** to make necessary changes on the "Routing Instructions" page.
12	Click the linked request number to view the request.
13	To print the request once you have displayed the item, use your browser's print feature.

Additional Resources:

- Completing the routing instructions page
- Routing of serial requests
- Routing of monographs and non-NLM serial requests

Ordering material not listed in NLM's OPAC (LocatorPlus)

To request copies of materials that are not in PubMed or LocatorPlus:

STEP	Action
1	Select **Requests** from the DOCLINE Main Menu.
2	Select **Borrow**.
3	Select **Manual**.
4	Fill out the bibliographic and citation fields as completely as possible in the "Citation Input" form.
5	Select **Type**: Journal or Monograph.
6	Select **NEXT** or **FINISH NOW**.
7	Review the "Routing Instructions" screen, modifying the M/A/N Map Routing as appropriate for this item. The request will only route to active libraries in the M/A/N Map that match the other routing instructions. To add or replace a library entry in the M/A/N Map, enter a valid LIBID in the desired cell. Click the question mark to the right of the LIBID to view the library's ILL information. To remove a library from the routing for a particular request, delete it from the M/A/N Map. **Note:** If the item is not in LocatorPlus, NLM does not own the item. Deselect **NLM**.
8	Select **NEXT** or **FINISH NOW**.
9	Edit delivery address on "Delivery Address" screen as needed.
10	Select **Finish** to complete your order request. **Note:** Select **Previous** to return to the previous Borrow input screen.
11	Select the linked request number to view the request.
12	To print the request once you have displayed the item, use your browser's print feature.

Note: All requests ordered manually will route on your library's M/A/N Map.

Additional resources:

- Completing the routing instructions page
- Routing of monographs and non-NLM serial requests

Ordering an item listed in NLM's OPAC (LocatorPlus)

To request the loan of materials listed in LocatorPlus, do the following:

STEP	Action
1	Select **Requests** from the DOCLINE Main Menu.
2	Select **Borrow**.
3	Under **Order LocatorPlus**, choose from "Select Key" drop-down box: **NLM Unique ID** (OPAC record number) **ISSN:** International Standard Serial Number **ISBN:** International Standard Book Number **OCLC:** OCLC record number. Must be at least 8 digits; for example, "01641120". **Full Title/Title Abbrev:** Complete monograph or serial title / Designated NLM journal title abbreviation **Truncated Journal Title / Title Abbrev:** Journal Title / Title abbreviation search with wildcard automatically appended at end of search term. For example, " *cell* " will retrieve titles beginning with "cell", "cellular", "cellulose", etc.) **Note:** NLM Unique ID includes the old TCN or Serial Holdings SEQ Number.
4	Enter one (1) LocatorPlus Unique ID. Click **Search**.
5	Complete citation information as completely as possible in "Citation Input" form. Click **NEXT**.
6	Review and modify the information on "Routing Instructions" screen as necessary, including the **Service Type** ("Copy" or "Original"). Choosing "Original" changes the NLM and Primary Network Delivery Method to "Mail", and enables only "Pickup" as an Alternate Network

STEP	Action
	Delivery Method. Click **NEXT** or **FINISH NOW**.
7	Edit delivery address on "Delivery Address" screen as needed.
8	Click **FINISH to** complete your request. **Note:** Click **PREVIOUS** to return to the previous Borrow input screen.
9	Once the transaction is completed successfully, the Request Confirmation page will display with the citation(s), the DOCLINE request number and the library to which the request routed. If the request could not be placed, a message will display. Click **Return** to make necessary changes on the "Routing Instructions" page.
10	Click the linked request number to view the request.
11	To print the request once you have displayed the item, use your browser's print feature.

Additional Resources:

- Completing the routing instructions page
- Routing of serial requests
- Routing of monographs and non-NLM serial requests

Ordering an item not listed in NLM's OPAC (LocatorPlus)

To request the loan of materials not in listed LocatorPlus, do the following:

STEP	Action
1	Select **Requests** from the DOCLINE Main Menu.
2	Select **Borrow**.
3	Select **Manual**.
4	Fill out the bibliographic and citation fields as completely as possible in the "Citation Input" form.
5	Select **Type:** Journal or Monograph from pull-down menu.
6	Select **NEXT** or **FINISH NOW**.
7	Review the "Routing Instructions" screen, modifying the M/A/N Map Routing as appropriate for this item. The request will only route to active libraries in the M/A/N Map that match the other routing instructions. To add or replace a library entry in the M/A/N Map, enter a valid LIBID in the desired cell. Click the question mark to the right of the LIBID to view the library's ILL information. To remove a library from the routing for a particular request, delete it from the M/A/N Map. **Note:** If the item is not in LocatorPlus, NLM does not own the item. Deselect **NLM**.
8	Select **NEXT** or **FINISH NOW**.
9	Edit delivery address on "Delivery Address" screen as needed.
10	Select **FINISH** to complete your request.
11	Click the linked request number to view the request.
12	To print the request once you have displayed the item, use your browser's print feature.

Note: All requests ordered manually will route on your library's M/A/N Map.

Additional resources:

- Completing the routing instructions page
- Routing of monographs and non-NLM serial requests

Routing Requests

Setting the default values used to route new requests

To modify the default values that are displayed on the Routing Instructions page during Borrow, do the following:

STEP	Action
1	Select **Institutions** from the DOCLINE main menu.
2	select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed
3	Click **DOCLINE Options** on the Institution Navigation bar
4	Enter the default authorization for ILL material in the **Authorized by** field.
5	Enter the default **Maximum Cost** willing to be paid 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.
6	Select "Yes" or "No" for **Require Patron Name** when placing requests.
7	Select the default method of **Copyright Compliance**: **Guidelines** or **Law**. **Note:** DOCLINE libraries are required to comply with the copyright law in their geographic area. In the U.S., the requesting library (borrower) is responsible for complying with copyright law, either the U.S. Copyright Act of 1976 (CCL) or the Copyright Guidelines (CCG)**.**

STEP	Action
8	Enter the default **Comments to Lender***s* to display on DOCLINE Receipts. **Note**: Comments should not contain information that already displays on request receipts (e.g., library group membership, delivery methods).
9	Select the default **Service Type** of your requests: **Copy**, **Color Copy**, or **Original** (Loan).
10	Select the default **Service Level**: **Normal**, **Rush**, or **Urgent Patient Care**
11	Select the default **NLM Delivery Method**
12	Select the default **Network Delivery Method**
13	Select the default **Network Alternate Delivery Method(s)**
14	Select "Yes" or "No" for **Route Only to EFTS Participants**.
15	In the "Serial Routing" area, indicate the default routing instructions for serials including your "Routing Cells", and whether to route to **Resource Libraries**, **NLM**, and to **All other libraries**.
16	Enter LIBIDs in **Do not Route To** field, if desired. (Maximum of 20 LIBIDs).
17	In the M/A/N Map (Monographs, Audiovisuals, and Non-NLM Journal Routing) indicate default lenders.
18	Click **SAVE**.

Additional Resources:

- Completing the Routing Instructions Page
- Do Not Route To
- Routing Table Overview
- M/A/N Map Overview

Routing by Physical Format

Borrowers can choose the physical format of the journal from which they want their requests filled. They may choose “Electronic”, “Text” or “Any” in the Fill from Physical Format field in the "Routing and Delivery" section of Borrow requests. The default is fill by “Any” physical format.

If the borrower selects “Electronic” or “Text”, DOCLINE will only route the requests to lenders who report owning the specified format. “Electronic” format matches the holdings format of ‘cr’ (electronic resource, remote). “Text” will match the serial holdings formats beginning with ‘t’ so Text; Text, Other, etc.).

Note: requests will automatically default to Electronic format for “Epub ahead of print” articles if ***every*** *citation on the Citation page* is “Epub ahead of print”.

Additional Resources:

- Completing the routing instructions page
- Routing of serial requests
- Routing of monographs and non-NLM serial requests.

Routing of serial copy requests

The routing order of copy requests for serials is determined by the information on the Routing Instructions page and the algorithm below:

1. Route to LIBID (if entered)

   Holdings are checked for the entered LIBID, but will route regardless of holdings.
   The routing algorithm will only route a request to a library IF

   a. the selected delivery method OR one of the alternate delivery methods is supported by that institution AND
   b. the institution is an active DOCLINE participant at the time of routing AND
   c. the institution is not in the borrower's Do Not Route to List AND
   d. the institution provides the selected level of service (if above Normal) AND
   e. the institution provides color copy service (if selected) AND
   f. the institution is an EFTS participant (if selected).

   Note: Selecting an individual library to "Route to" should **not** be necessary in most cases. If your requests are frequently not routing to preferred lenders, review your routing table with your RML.

2. Routing Table (using cells selected)

   The routing algorithm will randomly route a request to a library IF

   a. the selected preferred network delivery method is supported by that institution AND
   b. that institution reports owning either the volume or year of the title AND
   c. the institution's holdings are in the requested physical format (if Electronic or Text selected) AND
   d. the institution is an active DOCLINE participant at the time of routing AND
   e. the institution is not in the borrower's Do Not Route to List AND
   f. the institution provides the selected level of service (if above Normal) AND
   g. the institution provides color copy service (if selected) AND
   h. the institution is an EFTS participant (if selected);

   Then if less than 20 libraries selected for routing,

i. the institution supports one of the alternate delivery methods selected AND
j. conditions b-h are met.

Then repeat for cell 2, cell 3, etc.

3. Resource Libraries (if **Resource Libraries** selected)
The routing algorithm will randomly route to a maximum of 20 Resource Libraries. A request will only route to a Resource Library IF

a. the selected preferred network delivery method is supported by that institution AND
b. that institution reports holding either the volume or year of the title AND
c. the institution's holdings are in the requested physical format (if Electronic or Text selected) AND
d. the institution is an active DOCLINE participant at the time of routing AND
e. the institution is not in the borrower's Do Not Route to List AND
f. the institution provides the selected level of service (if above Normal) AND
g. the institution provides color copy service (if selected) AND
h. the institution is an EFTS participant (if selected) AND
i. the request did not previously route to institution;

Then if less than 20 libraries selected for routing,

j. the institution supports one of the alternate delivery methods selected AND
k. conditions b-i are met.

4. NLM (if route to **NLM** selected)
NLM holdings are not checked.
Request will route to the National Library of Medicine IF

a. Route to NLM checked AND
b. NLM provides the level of service selected AND
c. NLM is an active DOCLINE participant at the time of routing.

5. All Other Libraries (if selected)
The routing algorithm will randomly route a request to a maximum of 20 libraries. The algorithm first checks Resource Libraries, then Primary Access Libraries, then a list of four specific special libraries, and then "Other" Libraries. A request will randomly route to a library IF

a. the selected preferred network delivery method is supported by that institution AND
b. that institution reports holding either the volume or year of the title AND
c. the institution's holdings are in the requested physical format (if Electronic or Text selected) AND
d. the institution is an active DOCLINE participant at the time of routing AND
e. the institution is not in the borrower's Do Not Route to List AND
f. the institution provides the selected level of service (if above Normal) AND
g. the institution provides color copy service (if selected) AND
h. the institution is an EFTS participant (if selected) AND
i. the request did not previously route to the institution;

Then if less than 20 libraries selected for routing,

j. the institution supports one of the alternate delivery methods selected AND
k. conditions b-i are met;

Then if less than 20 Resource Libraries selected for routing,

l. Repeat steps a-k for Primary Access Libraries;

Then if less than 20 libraries selected for routing,

m. Repeat steps a-k for 1) American Hospital Association Library, 2) American Dental Association Library, 3) National Agricultural Library; and 4) Canada Institute for Scientific and Technical Information;

Then if less than 20 libraries selected for routing,

n. Repeat steps a-k for "Other" libraries (library level = Other).

Note: Delivery methods are not checked in the routing of an "Original" (loan) request since these are all assumed to be "Mail" delivery.

Additional resources:

- DOCLINE system actions (Time-triggered Actions)
- Routing of monographs and non-NLM serial requests
- Setting the default values used to route new requests

Routing by M/A/N Map (Monographs, A/V or non-NLM serial requests)

Because no holdings records are available for monographs and non-NLM serial items, requests route only to the institutions listed on your Routing Instructions page.

The following algorithm determines the routing order:

1. LIBIDs on Routing Instructions page.
   Holdings are not checked.
   Request is routed sequentially by Row (1-9) to the institutions designated IF

   a. a. LIBID is valid AND
   b. The selected preferred network delivery method OR one of the network alternate delivery methods is supported by that institution AND
   c. the institution is an active DOCLINE participant at the time of routing AND
   d. the institution provides the selected level of service (if above Normal) AND
   e. the institution provides color copy service (if selected) AND
   f. the institution is an EFTS participant (if selected).

2. NLM (if selected)
   NLM holdings are not checked.
   Request will route to NLM IF

   a. Route to NLM checked AND
   b. NLM provides the level of service selected AND
   c. NLM is an active DOCLINE participant at the time of routing.

Note: Delivery methods are not checked in the routing of an Original (loan) request since these are all assumed to be “Mail” delivery.

Additional resources:

- Ordering an item not listed in NLM's OPAC (LocatorPlus)
- DOCLINE system actions (Time-triggered Actions)
- Setting the default values used to route new requests
- Routing of serial requests

Lending

Lending Overview

The Lend feature allows DOCLINE libraries to update the status of requests received by their institution. Libraries can update their requests in batches or individually. The default update method can be set in the Lending Preferences portion of the Institution record.

The **Batch Lend** feature allows libraries to quickly process requests with the same action. Possible actions are "filled as requested", "filled as indicated" by a single delivery method, or "rejected" with a single rejection reason. Batch Lend provides the ability to use a barcode scanner to enter the request number. In Batch Lend, the user types, pastes or scans the request number(s) to process the request.

The **Single Lend** feature allows libraries to update multiple requests individually with different actions and reasons at the same time. The Single Lend feature also allows libraries to update the "Type", "Service Type", and "Delivery Method" values as appropriate for each request. In Single Lend, the user selects the request to process from a list of outstanding requests. Single Lend also allows the user to view and print the request receipt.

If a **Normal** request has not been updated within two (2) working days of receipt, a message is displayed on the DOCLINE Home page. Requests not updated after three (3) working days of receipt are automatically rerouted by DOCLINE.

If a **Rush** or **Urgent Patient Care** request is not updated the next business day following receipt, DOCLINE automatically reroutes the request to the next potential lender.

Additional resources:

- DOCLINE system actions (Time-Triggered Actions)
- Filling requests in batch
- Individually filling a request
- Prevent requests from routing to my library

Receiving Requests Overview

Libraries are notified in the Activity and Status area of the DOCLINE Home page when DOCLINE or Loansome Doc requests are awaiting receipt. "Awaiting receipt" indicates that a Lend request has routed to your library; as determined by the borrower's routing instructions, your holdings, your supported delivery methods, your EFTS membership, and your supported services (supplying Color Copy, Rush, and Urgent Patient Care requests).

Requests are "receipted" by clicking on the link in the **Activity and Status** area or by navigating to the Receipt page through the DOCLINE menu - **Requests**, then **Receipt**. Receipting a request indicates to the system and the borrower that you have viewed and acknowledged the interlibrary loan request.

For **Normal** service level requests, potential lenders have one (1) business day to receipt a request and three (3) business days to update a request after receipting it before DOCLINE will automatically remove it and route to another potential lender.

For **Rush** and **Urgent Patient Care** requests, potential lenders must receipt a request the same day, and have one (1) business day to update a request after receipting it before 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".

NLM encourages the timely receipt of requests. Doing so provides a more accurate picture of active requests, which benefits all users of the system as both borrowers and lenders receive request accurate status. Timely receipting also prevents unnecessary rerouting of requests via Time-triggered Actions.

Printing Requests

Users are notified on the main DOCLINE Home page when DOCLINE, DOCLINE Special Handling, and Loansome Doc requests are waiting receipt. Receipts can be printed with barcodes by downloading the barcode font.

Users can receipt requests from the Home page or from the **Requests / Receipt** menu.

To receipt DOCLINE or Loansome Doc requests and print each receipt on a single sheet of paper from the Home page or Receipt menu option, do the following:

STEP	Action
1	Select the "## requests awaiting RECEIPT" link in the Activity and Status area of the DOCLINE Home page; *OR* Select **Requests** from the DOCLINE Main Menu.
2	Select **Receipt**.
3	Select the desired "awaiting Receipt" link An acknowledgment message will appear displaying the number of requests receipted Click **OK** **Note:** Users can view receipts by scrolling down the page.
4	To print, click the **Print Receipts** button at the bottom of the page.
5	Print dialog window opens. Click **Print**.

Additional Resources:

- Lending Overview
- Receiving Requests Overview

Prevent requests from routing to my library

To prevent requests from routing to your library during closures or staff absences lasting three or more consecutive days, use the Out of Office feature in your institution record.

On the last day prior to your library becoming inactive, please process as many requests as possible as "Filled" or "Not Filled". At the end of the day, receipt any new requests and process all outstanding requests as "Not Filled" so they will immediately route on to the next potential lender.

If you have any questions or need to cancel an "out of office" request already submitted, please contact your Regional Medical Library.

Additional resources:

- How does Routing work?

DOCLINE system actions (Time-Triggered Actions)

Several time-triggered actions occur automatically in DOCLINE, based on the service level of the request (Normal, Rush, Urgent Patient Care) and length of time an ILL request is in the system and the action that has been taken on it.

For **Normal** Requests:

- An ILL request must be receipted by the lending library to which it was routed within one (1) business day.
- If a request is not receipted by 12:05 AM on the day following its routing to the lender, DOCLINE removes the request from the lender and routes it to another potential lender.
- On the second working day after an ILL request is receipted, DOCLINE issues a reminder message to the potential lender that there is one more day to update a request. This notification appears under **Status and Activity** on the DOCLINE Home page.
- If an ILL request is received but not acted upon within three (3) working days, DOCLINE automatically routes the request to another potential lender. On the third day, the system displays the number of hours remaining before the request is rerouted on the **Status/Cancel** page.
- **Note:** Weekends are not counted in the calculation of days. Only Monday - Friday (Eastern Time) count as business days, excluding the holidays listed below.

For **Rush** and **Urgent Patient Care** Requests:

A **Rush** or **Urgent Patient Care** request must be receipted by the lending library on the **same day** the request routed to the potential lender.

- If a request is not receipted on the same day it routes to the lender, DOCLINE removes the request from the lender and routes it to another potential lender at 12:05 AM the following morning.
- On the day after a **Rush** or **Urgent Patient Care** request is receipted, DOCLINE issues a reminder message to the potential lender that there

is one more day to update a request. This notification appears under **Status and Activity** on the DOCLINE Home page.

- If a request is received but not acted upon within one (1) business day, DOCLINE automatically routes the request to another potential lender.
- **Note:** Weekends are not counted in the calculation of days. Only Monday - Friday (Eastern Time) count as business days, excluding the holidays listed below.

For Loansome Doc Requests:

- Loansome Doc orders not updated in Lend or transferred in Borrow, expire after forty (40) calendar days, and remain in the system an additional forty (40) calendar days.

Schedule:

Time-Triggered Actions run between 12:05 AM - 12:15 AM (Eastern Time) Monday through Friday, except the holidays noted below. Users should avoid receipting and updating requests while the system is running time-triggered actions.

Time-triggered actions **do not** run on the following U.S. national holidays*:

- New Year's Day - January 1
- Memorial Day - Last Monday in May
- Independence Day - July 4
- Labor Day - First Monday in September
- Thanksgiving Day - Fourth Thursday in November
- Christmas Day - December 25

The following U.S. federal holidays **count** as business days for time-triggered actions because many libraries are open:

- Martin Luther King, Jr.'s, Birthday - Third Monday in January
- Presidents' Day - Third Monday in February
- Columbus Day - Second Monday in October
- Veterans' Day - November 11

***Note:** When one of these holidays falls on a non-work day (Saturday or Sunday), the holiday is usually observed on Monday-if the holiday falls on Sunday, or Friday-if the holiday falls on Saturday.

Saving Receipts as a Text File

To receipt DOCLINE or Loansome Doc requests and save the requests in a text file from the Home page or Receipt menu option, do the following:

STEP	Action
1	Go to the DOCLINE Home page where messages for your library are listed **OR** Select **Requests** from the DOCLINE Main Menu.
2	Select **Receipt**.
3	Select the desired "awaiting RECEIPT" link An acknowledgment message will appear displaying the number of requests receipted Click **OK** **Note:** Users can view receipts by scrolling down the page.
4	To print, click the **Print Receipts** button at the bottom of the page.
5	Print dialog window opens. Click **Print**.
6	To Save: *Internet Explorer*: Right click in receipts window, select **Select All.** Right click and select **Copy.** Open notepad, right click and paste the copied receipts. In notepad, select **File**, **Save**. Name the file and save to desired directory on your computer or network. *Firefox*: Right click in receipts window, select **This Frame**, **Save Frame As**. In the Save dialog box, change type to Text Files (*.txt). Name the file and save to desired directory on your computer or network.

Individually filling a request

Single Lend allows lenders to select requests from a list of pending requests, to process a set of requests with differing actions, delivery methods, or Type and Service Type values.

To individually fill requests, do the following:

STEP	Action
1	Select **Requests** from the DOCLINE main menu.
2	Select **Lend**.
3	On the **Single** tab of the **Lend** update window, select "Filled" in the **Action** column for the corresponding request. **Note:** As each request number is updated with an **Action**, the values in the **Method/Reason**, **Type** and **Service Type** columns display the information specific to that request. To view the request receipt, click the request number in the **Request #** column.
4	Change the values under the **Method/Reason**, **Type** and **Service Type** columns as needed for each request. **Note:** Requests should be delivered by the borrower's preferred or one of their network alternate delivery methods. Be sure to update DOCLINE with the actual delivery method for the request once it has been completed. Before sending by a delivery method not indicated by the borrower, please first check with the borrower that the delivery method is acceptable.
5	Click **UPDATE** to process these requests.
6	The **DOCLINE Requests Updated** window appears with the processed request number(s), with their corresponding action and delivery method displayed.
7	To process additional requests, click **Return**.

Additional Resources:

- Modifying your lending preferences

Filling requests in batch mode

Batch Lend allows lenders to quickly process a set of requests with the same action and method or rejection reason at one time.

To fill a batch of requests, do the following:

STEP	Action
1	Select **Requests** from the DOCLINE main menu.
2	Select **Lend**.
3	On the **Batch** tab of the **Lend** update window, enter the request number(s) in the input box. Separate request numbers with a space, a comma, or a carriage return (press Enter after each request number).
4	If requests were filled via the borrower's preferred delivery method, and Service Type (copy, color copy, original), select **Filled as Requested by Borrower**. If requests were filled via one of the borrower's alternate delivery methods, select the appropriate delivery method from the **Filled via** drop-down list. **Note**: Requests should be delivered by the borrower's preferred or one of their alternate delivery methods. Be sure to update DOCLINE with the actual delivery method for the request once it has been completed. Before sending by a delivery method not indicated by the borrower, please first check with the borrower that the delivery method is acceptable.
5	Click **UPDATE** button to process these requests.
6	The **DOCLINE Requests Updated** window appears with the request number(s) displayed in the order entered.
7	To process additional requests, click **Return**.

Tip: Lenders can quickly enter request numbers into the Request Numbers input box by using a barcode reader to scan the barcode printed on the DOCLINE receipt.

Additional Resources:

- Barcodes on DOCLINE and Loansome Doc Requests
- Modifying your lending preferences

Individually rejecting requests

Single Lend allows lenders to select requests from a list of pending requests, to process a set of requests with differing actions, delivery methods, or Type and Service Type values.

To individually reject requests, do the following:

STEP	Action
1	Select the **Requests** from the DOCLINE main menu.
2	Select **Lend**.
3	On the **Single** tab of the **Lend** update window, select "Rejected" in the **Action** column. **Note:** As each request number is updated with an **Action**, the values in the **Method/Reason**, **Type** and **Service Type** columns will reflect information specific to that request. To view the request receipt, click the request number in the **Request #** column.
4	Select the appropriate rejection reason under the **Method/Reason** column for each request. **Note:** Requests should be rejected with the code most nearly describing the reason the Lender is unable to fill.
5	Click **UPDATE** to process these requests.
6	The **DOCLINE Requests Updated** window appears with the processed Request number(s) with their corresponding action and rejection reason displayed.
7	To process additional requests, click **Return**.

Additional Resources:

- Request Actions
- Rejection Reasons
- Modifying your lending preferences

Rejecting requests in batch mode

To reject a batch of requests, do the following:

STEP	Action
1	Select **Requests** from the DOCLINE main menu.
2	Select **Lend**.
3	On the **Batch** tab of the **Lend** update window, enter the request number(s) in the input box. Separate request numbers with a space, a comma, or a carriage return (press Enter after each request number).
4	Select **Rejected because** and choose the appropriate rejection reason for the batch of requests. **Note**: Requests should be rejected with the code most nearly describing the reason the Lender is unable to fill.
5	Click the **UPDATE** button to process these requests.
6	The **DOCLINE Requests Updated** window appears with the request number(s) displayed in the order entered by the user.
7	To process additional requests, click **Return**.
8	To process more requests, click **Return**.

Additional Resources:

- Rejection Reasons
- Barcodes on DOCLINE and Loansome Doc Requests
- Modifying your lending preferences

EFTS

Creating an EFTS billing file

EFTS File Builder allows EFTS participants to create the transaction upload file to bill borrowers for filled items. Only requests from borrowers that are EFTS participants will display.

To create an EFTS transaction file, do the following:

STEP	Action
1	Select Requests from the DOCLINE Main Menu.
2	Select **EFTS**.
View	Filled transactions from EFTS borrowers are displayed. LIBID, institution name, transaction information, request number and filled date are displayed. Transactions are displayed grouped by LIBID by default. A maximum of 100 requests are displayed at one time beginning with the oldest transactions. As requests are processed, additional transactions are displayed. **Note:** Transactions are only available for 150 days after the filled date.
3	(Optional) To eliminate transactions from libraries in a particular library group, select the desired Library Group(s) to exclude. Select **REFRESH**.
4	(Optional) Select the desired sort of the requests. Select **REFRESH**. DOCLINE will remember your selections for future uses of EFTS File Builder. You can change them at any time. The updated selection will be remembered from that point forward.
5	Enter charges in US Dollars for items to be included in the billing file. DOCLINE **does not** store this information. Enter "0" if request is not to be charged. Select **Skip for**

STEP	Action
	now to process the request at a later date. **Note:** Canadian libraries should enter charges in Canadian Dollars only when billing other Canadian libraries.
6	Use the keyboard **Tab** key to move to the next request.
7	Select **Continue**.
8	Review transaction charges. Select **Back** to return to modify any charges. Skipped transactions and zero charge (0) items will not be included in the EFTS file. (Optional) Print the confirmation page using your browser's print functionality.
9	Select **Continue**.
10	Select **Create EFTS File**.
11	Select **Save** when prompted to download the file.
12	Accept default file name and save location, or modify to desired name and location on your computer or network. **Note:** If you create multiple files on the same day, you will need to modify the default file name to avoid overwriting the previous file. For example, EFTS_Oct112006a.txt, and EFTS_Oct112006b.txt.
13	The saved file can be uploaded to the EFTS website to bill the borrowers at your convenience.
14	Select **REFRESH** to process any remaining requests.

Additional Resources:

- Charging for requests previously set to no charge
- Reprocessing requests previously added to an EFTS file

Reprocessing requests previously added to an EFTS file

Libraries can review requests already included in an EFTS file for confirmation, to revise charges, or to re-generate a file if deleted or lost.

Use with caution. Requests can only be submitted to EFTS once. This feature is intended to regenerate a file for a set of requests when a file is lost, or multiple requests have incorrect charges. Corrections for individual requests as well as credits should be completed directly at the EFTS website.

To reprocess requests previously added to an EFTS transaction file, do the following:

STEP	Action
1	Select **Requests** from the DOCLINE Main Menu.
2	Select **EFTS**.
3	Select **EFTS Status** "Items already added to file"
4	(Optional) Select the desired sort of the requests.
5	Select **REFRESH**.
View	Requests that were previously included in an EFTS file are displayed. LIBID, institution name, transaction information, request number and filled date are displayed. DOCLINE **does not** store charges information so previously entered charges will not be displayed. **Note:** Transactions are only available for 150 days after the filled date.
6	To re-process requests, enter charges in US Dollars for items to be included in a new billing file.
7	Select **Continue**.
8	Review transaction charges. Select **Back** to return to modify any charges. Skipped transactions will remain as "already added to EFTS file". Zero charge (0) items will set as a "free" item

STEP	Action
	in DOCLINE and will not be included in the EFTS file. (Optional) Print the confirmation page using your browser's print functionality.
9	Select **Continue**.
10	Select **Create EFTS File**.
11	Select **Save** when prompted to download the file.
12	Accept default file name and save location, or modify to desired name and location on your computer or network. **Note:** If you create multiple files on the same day, you will need to modify the default file name to avoid overwriting the previous file. For example, EFTS_Oct112006a.txt, and EFTS_Oct112006b.txt.
13	The saved file can be uploaded to the EFTS website to bill the borrowers at your convenience.
14	Select **REFRESH** to process any remaining requests.

Additional Resources:

- Creating a EFTS billing file
- Charging for requests previously set to no charge

Charging for requests previously set to no charge

Libraries can review requests which they previously indicated were not to be charged. This allows libraries to later charge for a request that was incorrectly set to "no charge".

The "No charge (free)" search retrieves those requests that the library set the charge to "0" through the EFTS File Builder interface.

To reprocess requests previously set to "0" charge through the EFTS File Builder, do the following:

STEP	Action
1	Select **Requests** from the DOCLINE Main Menu.
2	Select **EFTS**.
3	Select **EFTS Status** "No charge (free)"
4	(Optional) Select the desired sort of the requests.
5	Select **REFRESH**.
View	Requests that were previously set to “0” charge through EFTS File Builder are displayed. *LIBID* , institution name, transaction information, request number and filled date are displayed. **Note:** Transactions are only available for 150 days after the filled date.
6	Enter charges in US Dollars for items to be included in a new billing file. **Note:** Canadian libraries should enter charges in Canadian Dollars only when billing other Canadian libraries.
7	Select **Continue**.
8	Review transaction charges. Select **Back** to return to modify any charges. Skipped transactions will remain as “already added to

STEP	Action
	EFTS file". Zero charge (0) items will set as a "free" item in DOCLINE and will not be included in the EFTS file. (Optional) Print the confirmation page using your browser's print functionality.
9	Select **Continue**.
10	Select **Create EFTS File**
11	Select **Save** when prompted to download the file.
12	Accept default file name and save location, or modify to desired name and location on your computer or network. **Note:** If you create multiple files on the same day, you will need to modify the default file name to avoid overwriting the previous file. For example, EFTS_Oct112006a.txt, and EFTS_Oct112006b.txt.
13	The saved file can be uploaded to the EFTS website to bill the borrowers at your convenience.
14	Select **REFRESH** to process any remaining requests.

Additional Resources:

- Creating a EFTS billing file
- Reprocessing requests previously added to an EFTS file

Managing Requests

Finding a request

To find DOCLINE requests**:**

STEP	Action
1	Select **Requests** from the DOCLINE main menu.
2	Select **Status/Cancel**.
3	Retrieve your request(s) by entering the request number(s), patron name or email address in the **Request # or Patron** box *OR* under **Define Search Limits** select search criteria, (e.g., "DOCLINE" or "Loansome Doc", "Borrow" or "Lend"), choose request status (e.g., "Pending", "Filled") and set the date range you wish to search within. Requests are available for 150 days from date of Final Action (filled or rejected). Click **SEARCH**.
View	Request data is displayed in the following columns: **Request #**, **Request Info**, **Action Date**, **Action** and **Institution**. Requests can be sorted **Oldest** to Newest, **Newest** to oldest, by **Action**, **Patron Name**, **Institution** or **Service Level**. To change sorting, select **Sorted By** at the top of the page, and make selections under **View Options**. Click **REFRESH**.
4	To view a request, click the request number under the **Request #** column.
5	To contact the borrower or lender for a specific request, select **Contact Library**. To view the lender's ILL information, including the contact information, charges and delivery methods, click on the **LIBID** next to the lending institution name. A new window will open with the ILL information. The entire Institution's record may be viewed by clicking the **Institutions Record** button at the bottom of the ILL information window. To return to **Status/Cancel**, click the **Close** button at the bottom of

STEP	Action
	the Institution record window.
6	To view the history, click on the action text (e.g. "Not Filled" or "Canceled") under the **Action** column.
7	To return to **Status/Cancel** after viewing the request or the routing history, click **Return**.

Additional Resources:

- Canceling a request

Canceling a request

To cancel a request, do the following:

STEP	Action
1	Select **Requests** from the DOCLINE main menu.
2	Select **Status/Cancel**.
3	Retrieve your request(s) by entering the request number(s), patron name or email address in the **Request # or Patron** box *OR* under **Define Search Limits** select search criteria, (e.g., "DOCLINE" or "Loansome Doc", "Borrow" or "Lend"), choose request status (e.g., "Pending", "Filled") and set the date range you wish to search within. Requests are available for 150 days from date of Final Action (filled or rejected). Click **SEARCH**.
View	Request data is displayed in the following columns: **Request #**, **Request Info**, **Action Date**, **Action** and **Institution**. Requests can be sorted **Oldest** to Newest, **Newest** to oldest, by **Action**, **Patron Name**, **Institution** or **Service Level**. To change sorting, select **Sorted By** at the top of the page, and make selections under **View Options**. Click **REFRESH**.
4	To view a request, click the request number under the **Request #** column.
5	Mark request(s) to cancel by selecting checkbox(es).
6	Click **Cancel** under **Actions for Selected Requests**. **Note**: Only pending requests are eligible for cancellation. Requests with the following statuses can be canceled immediately. **New** - new request entered by borrower, but not yet received by a lender. **Rerouted Online** - request was not filled by first lender, and rerouted to the next potential lender. **Rerouted TTA** - rerouted because of DOCLINE time-triggered actions after first potential lender did receipt or act upon the request. Requests that have been Received by an institution can only be **marked** for cancellation. Since the potential lender may be in the

STEP	Action
	process of filling a Received request, DOCLINE will note that a cancellation is pending. The institution can update the request as "Filled". If the request is updated as "Not Filled" by the lender, the request is immediately canceled. Borrowers can call the lender to notify them of the pending cancellation, but please understand if the lender's workflow does not permit this accommodation. **Note**: NLM **cannot** respond to requests to cancel a request that has been received by NLM.
7	System displays cancellation status. Click **Return** to view remaining requests.

Viewing the routing and action history of a request

STEP	Action
1	Select **Requests** from the DOCLINE main menu.
2	Select **Status/Cancel**.
3	Retrieve your request(s) by entering the request number(s), patron name or email address in the **Request # or Patron** box *OR* under **Define Search Limits** select search criteria, (e.g., "DOCLINE" or "Loansome Doc", "Borrow" or "Lend"), choose request status (e.g., "Pending", "Filled") and set the date range you wish to search within. Requests are available for 150 days from date of Final Action (filled or rejected). Click **SEARCH**.
View	Request data is displayed in the following columns: **Request #**, **Request Info**, **Action Date**, **Action** and **Institution**. Requests can be sorted **Oldest** to newest, **Newest** to oldest, by **Action**, **Patron Name**, **Institution** or **Service Level**. To change sorting, select **Sorted By** at the top of the page, and make selections under **View Options**. Click **REFRESH**.
4	To view a request, click the request number under the **Request #** column.
5	To view the history, click on the action text (e.g. "Not Filled" or "Canceled") under the **Action** column.
6	To return to **Status/Cancel** list after viewing the request or the routing history, click **Return**.
7	To contact the borrower or lender for a specific request, select **Contact Library**.

Additional Resources:

- Request Actions
- Routing and Removal Reasons
- Rejection Reasons

Finding the status of a request

To find the status of a specific request as a borrower or lender, do the following:

STEP	Action
1	Select **Requests** from the DOCLINE main menu.
2	Select **Status/Cancel**.
3	Retrieve your request(s) by entering the request number(s), patron name or email address in the **Request # or Patron** box *OR* under **Define Search Limits** select search criteria, (e.g., "DOCLINE" or "Loansome Doc", "Borrow" or "Lend"), choose request status (e.g., "Pending", "Filled") and set the date range you wish to search within. Requests are available for 150 days from date of Final Action (filled or rejected). Click **SEARCH**.
View	Request data is displayed in the following columns: **Request #**, **Request Info**, **Action Date**, **Action** and **Institution**. Requests can be sorted **Oldest** to Newest, **Newest** to oldest, by **Action**, **Patron Name**, **Institution** or **Service Level**. To change sorting, select **Sorted By** at the top of the page, and make selections under **View Options**. Click **REFRESH**.
4	To view a request, click the request number under the **Request #** column. To view the routing history (if borrower), click on the action text (e.g. "Filled") under the **Action** column.
5	To return to **Status/Cancel** after viewing the request or the routing history, click **Return**.

Additional Resources:

- Request Actions
- Routing and Removal Reasons
- Rejection Reasons
- Canceling a Request

Finding Loansome Doc requests as a Lender

To find Loansome Doc requests that authorized patrons have sent to your institution, do the following:

STEP	Action
1	Select **Requests** from the DOCLINE main menu.
2	Select **Status/Cancel**.
3	Enter request number(s), patron name or email address in the **Request # or Patron** box *OR* Select "Loansome Doc" in the **Define Search Limits** area. Optionally, refine your search by status of request by selecting "Filled", "Pending", or "Retired". Click **SEARCH**.
4	Results are displayed. The default sort order is **Requests – Oldest** to newest. Requests can also be sorted **Newest** to oldest, by **Action**, **Patron Name**, **Institution** or **Service Level**. To change sorting, select **Sorted By** at the top of the page, and make selections under **View Options**. Click **REFRESH**.
View	As the Loansome Doc lender, you see the last action taken on the Loansome Doc requests you searched. The columns displayed are: **Request #**, **Request Info**, **Action Date**, **Action** and **Institution**.. **Note**: Patron name is included under **Request Info.**
5	To view a request, click the request number under the **Request #** column.
6	To return to **Status/Cancel** after viewing the request or the routing history, click **Return.**

Additional Resources:

- Transferring Loansome Doc requests

Finding Loansome Doc requests transferred to DOCLINE

To find and view the status of Loansome Doc requests that have been transferred into DOCLINE, do the following:

STEP	Action
1	Select **Requests** from the DOCLINE main menu.
2	Select **Status/Cancel**.
3	Under **Define Search Limits,** select request type "Loansome Doc" and "Transfer". Select status: "All" (all LD requests regardless of their status), "Filled" (LD requests filled by you only), "Pending" (LD requests awaiting action by you), or "Retired" (LD requests not filled by you). Set the date range you wish to search within. Click **SEARCH**.
View	Request data is displayed in the following columns: **Request #**, **Request Info**, **Action Date**, **Action** and **Institution**. Requests can be sorted **Oldest** to newest, **Newest** to oldest, by **Action**, **Patron Name**, **Institution** or **Service Level**. To change sorting, select **Sorted By** at the top of the page, and make selections under **View Options**. Click **REFRESH**.
4	To view a request, click the request number under the **Request #** column. To view the routing history, click on the action text (e.g. "Filled") under the **Action** column.
5	To return to **Status/Cancel** after viewing the request or the routing history, click **Return**.

Additional Resources:

- Transferring Loansome Doc requests

Resubmitting retired unfilled requests

To resubmit retired unfilled requests from the DOCLINE Home page, do the following:

STEP	Action
1	Select the "requests were retired unfilled" link in the **Activity and Status** area of the DOCLINE Home page.
View	Request data is displayed in the following columns: **Request #**, **Request Info**, **Action Date**, **Action** and **Institution**. Requests can be sorted **Oldest** to Newest, **Newest** to oldest, by **Action**, **Patron Name**, **Institution** or **Service Level**. To change sorting, select **Sorted By** at the top of the page, and make selections under **View Options**. Click **REFRESH**.
2	To view a request, click the request number under the **Request #** column.
3	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 No Later Than" date, etc.).
4	To return to the **Status/Cancel** screen after viewing the request or routing history, click **Return**.
5	To resubmit a request, click on the green arrow, or the "Resubmit Request" link corresponding to the desired request, in the **Request #** column. **Note**: The values displayed on the **Citation Input**, **Routing Instructions**, and **Delivery Address** pages are from the retired request.

STEP	Action
6	Review the citation information of the retired request (non-PubMed requests only). As necessary, modify the citation on the **Citation Input** screen. Click **NEXT**.
7	Review the **Routing Instructions** of the retired request. a. If "Not Filled" (Cost), check the **Maximum Cost** field. b. If "Expired", check the **Need No Later Than** field. c. If "Beyond Routing Map", check the **Service Level**, **Service Type**, **Physical Format**, **Only Route to EFTS Participants** limit, delivery method(s), and routing cells selected. Modify the **Routing Instructions** as necessary to widen your pool of potential lenders to maximize the chances of having the request filled. For example, select route to **Resource Libraries** and **All other Libraries**, or remove the **Only Route to EFTS Participants** limit. Click **NEXT**.
8	Review the delivery address and modify as necessary. Click **FINISH.** A new DOCLINE request number is generated.
9	Click **RETURN** to go back to **Status/Cancel** to view the list of remaining retired requests.
Notes	A DOCLINE request can only be resubmitted once. A transferred Loansome Doc request becomes a DOCLINE request. If the DOCLINE request retires, the linked Loansome Doc request is retired as well. If you choose to resubmit the DOCLINE request, it is not linked to the Loansome Doc request and will not generate the "Shipped to Patron" notification upon Fill.

To resubmit retired unfilled requests from **Status/Cancel**:

STEP	Action
1	Select **Requests** from the DOCLINE main menu.
2	Select **Status/Cancel**.
3	Enter the request number(s), patron name or email address in the **Request # or Patron** search box **OR** Select search criteria of "DOCLINE/Borrow/Retired" in the **Define Search Limits** search area. Optionally, set the date range you wish to search within. Requests are available for 150 days from date of Final Action (filled or rejected). Click **SEARCH**.
View	Request data is displayed in the following columns: **Request #**, **Request Info**, **Action Date**, **Action** and **Institution**. Requests can be sorted **Oldest** to Newest, **Newest** to oldest, by **Action**, **Patron Name**, **Institution** or **Service Level**. To change sorting, select **Sorted By** at the top of the page, and make selections under **View Options**. Click **REFRESH**.
4	To view a request, click the request number under the **Request #** column.
5	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 determine which values to modify during resubmit (e.g. "Cost", "Need No Later Than" date, etc.).
6	To return to the **Status/Cancel** screen after viewing the request or routing history, click **Return**.
7	To resubmit a request, click on the green arrow, or the **Resubmit Request** link corresponding to the desired request, in the **Request #** column. **Note**: The values displayed on the **Citation Input**, **Routing Instructions**, and **Delivery Address** pages are from the retired request.

STEP	Action
8	Review the citation information of the retired request (non-PubMed requests only). As necessary, modify the citation on the **Citation Input** screen. Click **NEXT**.
9	Review the **Routing Instructions** of the retired request. a. If "Not Filled" (Cost), check the **Maximum Cost** field. b. If "Expired", check the **Need No Later Than** field. c. If "Beyond Routing Map", check the **Service Level**, **Service Type**, **Physical Format**, **Only Route to EFTS Participants** limit, delivery method(s), and routing cells selected. Modify the **Routing Instructions** as necessary to widen your pool of potential lenders to maximize the chances of having the request filled. For example, select route to **Resource Libraries** and **All other Libraries**, or remove the **Only Route to EFTS Participants** limit. Click **NEXT**.
10	Review the delivery address and modify as necessary. Click **FINISH.** A new DOCLINE request number is generated.
11	Click **RETURN** to go back to **Status/Cancel** to view the list of remaining retired requests.
Notes:	A DOCLINE request can only be resubmitted once. A transferred Loansome Doc request becomes a DOCLINE request. If the DOCLINE request retires, the linked Loansome Doc request is retired as well. If you choose to resubmit the DOCLINE request, it is not linked to the Loansome Doc request and will not generate the "Shipped to Patron" notification upon Fill.

Additional Resources:

- Viewing the routing and action history of a request
- Routing of serial requests
- Routing of monographs and non-NLM serial requests

Reviewing Retired Unfilled requests

To remove the notification for an individual retired unfilled request, do the following:

STEP	Action
1	Select the "requests were retired unfilled" link in the **Activity and Status** area of the DOCLINE Home page.
View	Request data is displayed in the following columns: **Request #**, **Request Info**, **Action Date**, **Action** and **Institution**. Requests can be sorted **Oldest** to Newest, **Newest** to oldest, by **Action**, **Patron Name**, **Institution** or **Service Level**. To change sorting, select **Sorted By** at the top of the page, and make selections under **View Options**. Click **REFRESH**.
2	To view a request, click the request number under the **Request #** column.
3	To view the history of a request, click on the action text (e.g. "Not Filled" or "Expired") under the **Action** column.
4	To remove the individual request from the retired unfilled notification list, select **Reviewed**. **OR** To retain requests in unreviewed status, select **Return** to return to the **Status/Cancel** list of retired requests

To remove the notification for all retired unfilled requests, do the following:

STEP	Action
1	Select the "requests were retired unfilled" link in the **Activity and Status** area of the DOCLINE Home page.
View	Request data is displayed in the following columns: **Request #**, **Request Info**, **Action Date**, **Action** and **Institution**. Requests can be sorted **Oldest** to Newest, **Newest** to oldest, by **Action**, **Patron Name**, **Institution** or **Service Level**. To change sorting, select **Sorted By** at the top of the page, and make selections under **View Options**. Click **REFRESH**.
2	To view a request, click the request number under the **Request #** column.

STEP	Action
3	To view the history of a request, click on the action text (e.g. "Not Filled" or "Expired") under the **Action** column.
4	To remove all requests from the Retired Unfilled notification list, click **Reviewed** under **Actions for Selected Requests**.

Additional Resources:

- Resubmitting retired unfilled requests
- Viewing the routing and action history of a request

Transferring Loansome Doc requests

Libraries may transfer unfilled Loansome Doc requests into DOCLINE if they are unable to fill the request from their own collection. Library Policy will dictate whether you transfer a specific request (e.g., patron's max cost or copyright compliance issues), or whether you transfer any requests for a particular Loansome Doc patron type (e.g., unaffiliated users).

STEP	Action
1	Select **Requests** from the DOCLINE Main Menu.
2	Select **Borrow**.
3	Select **Loansome Doc Transfer**.
4	Select the **Show All** button to retrieve all pending requests *Or* Enter a specific Loansome Doc request number, or all or part of a patron name or email address and click **Search**.
View	Pending Loansome Doc request(s) are displayed. The citation is shown, and if an item is available free online in PubMed Central or through a publisher site, a "FREE" icon and link appears. If your library reports holdings for the title, a message is displayed. The patron's name and patron type are displayed. Patron status is also displayed if "Not authorized".
5	Select "Patron" or "Library" as the **Ship Request To** delivery destination. **Note:** If **Ship to Patron** is selected, the patron's delivery address and delivery method are displayed. If **Ship to Library** is selected, the library's default delivery method and alternate delivery methods are displayed.
6	Click the **Transfer Request** link for the specific request to initiate the transfer.
7	Review and complete the **Routing Instructions** page. Click **NEXT** or **FINISH NOW**. **Note:** The max cost value is taken from the amount

STEP	Action
	specified in the patron's request.
8	Review the **Delivery Address** page. Update as necessary.
9	Click **FINISH**.
10	Once the transaction is completed successfully, the **Request Confirmation** page will display with the citation, the DOCLINE request number and the library to which the request routed. If the request cannot be routed to any library per your routing instructions and available holdings, you will be notified on a new page. Select **Return** to make necessary changes on the "Routing Instructions" screen.
11	Select **Return** to transfer another Loansome Doc citation from the remaining list.

Additional Resources:

- Completing the routing instructions page
- Routing of serial requests

Request Actions and Reasons

Request Actions

Actions represent a request's current status. These system generated messages display in the Action column of the Status/Cancel window. Requests that originated in DOCLINE will carry DOCLINE Actions, and those requests that originated in Loansome Doc will carry Loansome Doc Actions.

DOCLINE Action	Description
Beyond Routing Map	Request was retired when all routing possibilities were exhausted based upon the Routing Instructions.
Canceled	Request was canceled by borrower.
Expired	Request expired when patron's Need-by-Date was exceeded.
Filled	Request was completed as filled.
New	Request was entered by borrower, but not yet received by lender.
Not Filled	Request was completed as not filled. The reasons Canceled, Cost, Copyright, or Incomplete halt the request from further routing.
Received	Request was receipted by potential lender.
Rerouted Online	Request was not filled by a potential lender, and then routed to next library.
Rerouted TTA	Request was not receipted or acted upon by potential lender, routed to next library by Time-triggered Actions.

Loansome Doc Action	Description
Transferred	LD request was transferred to DOCLINE and is pending a final action.

Loansome Doc Action	Description
TRN/Shipped to Library	LD request was transferred to DOCLINE and is pending a final action.
TRN/Shipped to Patron	LD request was transferred to DOCLINE, filled, and shipped to the patron.
TRN/Expired	LD request was transferred into DOCLINE, then expired when Need by Date was exceeded.
TRN/Canceled	LD request was transferred into DOCLINE, and then canceled by transferring library.
TRN/Not Filled	LD request was transferred into DOCLINE, not filled and stopped routing for one of the following reasons: Cost, Canceled, Copyright or Not Found as Cited.
TRN/Beyond Routing Map	LD request was transferred into DOCLINE, but was retired when all routing possibilities were exhausted based upon the Routing Instructions.

Additional resources:

- Routing and Removal Reasons

Routing and Removal Reasons

Routing Reasons are system generated during the routing process. Removal Reasons are system generated in Time-triggered actions.

Routing Reasons	Description
Prefixed	The request was prefixed (sent directly) to this institution by the borrowing library.
Cells 1-9	The request routed to the institution based upon its cell position (1-9) in the borrower's Routing Table.
Resource	The request routed to a resource library based on the borrower's checkbox for **Refer to Resource Libraries** on the Routing Instructions page.
NLM	Request routed to NLM based on borrower's Routing Instructions. Requests route to NLM when **Route to NLM** is selected.
Refer On	Based upon the Routing Instructions, the request routed to the institution as part of **Refer on after NLM**. The **Refer on after NLM** checkbox offers the option to have a request routinely route to an additional 20 libraries if NLM cannot fill it or if the borrower did not select **Route to NLM** in the NLM Delivery Method.
M/A/N Map	The request routed to this lender based on the borrower's monograph, audiovisual, non-Serial Holdings map (M/A/N Map) values in the Routing Instructions.

Removal Reason	Description
Not acted upon	DOCLINE rerouted the request after 3 days because the lender did not take action after "receipting" the request.

Removal Reason	Description
Not receipted	Lender did not receipt the request within one business day.

Additional resources:

- Rejection Reasons

Rejection Reasons

Rejection Reasons are chosen by a potential lender as a reason for not filling a request.

Rejection Reason	Description
Bindery	The lender holds the item requested, but it is currently at the bindery and unavailable for loan or copying.
Canceled	The request was canceled by the lender at the borrower's request.
Condition	The material is held, but the physical condition of the volume or issue prohibits lending or copying.
Copy limit	The number of pages requested exceeds the copy limit imposed by this institution.
Copyright	The lender has determined that this request is in violation of copyright compliance (l=royalty payments made to copyright clearance center; g=requested under fair use copyright guidelines). This request has retired.
Cost	The lender's minimum cost to supply the requested item is greater than the maximum cost authorized by the borrower. This request has retired.
In Process	The material has been received, but is not yet ready for use.
In Use	The lender reports the volume/issue was in use and unavailable for loan or copy at the time of the request.
Incomplete	The lender believes that the citation on the request is either incomplete or incorrect. This request has retired.
Lacking	The lender holds the title, but is missing the requested issue or volume.
License Restriction	The lender's journal subscription prohibits ILL under the conditions specific to this

Rejection Reason	Description
	request. For example, subscription prohibits ILL from the online journal to libraries outside the lender's country.
Lost	The lender declares this title or volume/issue is lost or withdrawn from its collection.
Non-circ	The lender holds this item, but reports that it is not available for loan.
Not yet received	The title is owned, but lender reports volume/issue has not yet been received.
Not on shelf	The lender holds this item, but reports that it was not on the shelf at the time the request was received.
On order	The item has been ordered, but has not been received by the library.
Other	Request was rejected for a reason other than those listed. Please check with lender.
Title not owned	The requested title is not owned by the lending library.

Additional resources:

- Routing and Removal Reasons

Request Reports

Downloading reports

Downloading Reports to Excel

Downloading with Internet Explorer (IE):

STEP	Action
1	Select Requests from the DOCLINE main menu.
2	Select **Reports**.
3	Select the report to download.
4	While viewing the report, go to the **Edit** menu at the top of your IE browser window and choose **Select All**.
5	Go back to the **Edit** menu and choose **Copy**. (**Note:** In IE 7.x, if the menu bar is not displayed by default, right click in the report on the browser screen and highlight **Select All**. Next right click on the report and select **Copy**.)
6	Open Excel and open a new workbook.
7	Make sure your cursor is in cell A1.
8	From the **Edit** menu, in Excel, choose **Paste**.
9	To save as a new file, go to the **File** menu and choose **Save As...**
10	Add or modify formatting as desired for local needs.

Downloading with Firefox:

STEP	Action
1	Select **Requests** from the DOCLINE main menu.
2	Select **Reports**.
3	Select the report to download.
4	While viewing the report, go to the **Edit** menu at the top of your Firefox browser window and choose **Select All**.
5	Go back to the **Edit** menu and choose **Copy.**
6	Open Excel and open a new workbook.

STEP	Action
7	Make sure your cursor is in cell A1.
8	From the **Edit** menu, in Excel, choose **Paste**.
9	To save as a new file, go to the **File** menu and choose **Save As...**
10	Add or modify formatting as desired for local needs.

Additional Resources:

- Viewing and printing reports

Viewing and printing reports

Viewing Reports

STEP	Action
1	Select **Requests** from the DOCLINE main menu.
2	Select **Reports**.
3	To view a report, click on the report number link.

Printing Reports

Printing with Internet Explorer (IE):

STEP	Action
1	Select **Requests** from the DOCLINE main menu.
2	Select **Reports**.
3	Select the report to print.
4	From the **File** menu at the top of the IE browser window, choose **Page Setup...** (**Note:** In IE 7.x, if the menu bar is not displayed by default, from the printer icon on the command bar, select **Page Setup** to change the page orientation and to print the report.)
5	Change the Orientation of the page to Landscape. Click **OK**. (**Note:** The location of this setting will depend upon your printer & printer driver.)
6	From the **File** menu, choose **Print...**
7	Choose the printer you wish to print to and click the **Print** button.

Printing with Firefox:

STEP	Action
1	Select **Requests** from the DOCLINE main menu.
2	Select **Reports**.

STEP	Action
3	Select the report to print.
4	From the **File** menu at the top of the Firefox browser window, choose **Page Setup...**
5	On the 'Format & Options' tab, change the Orientation of the page to 'Landscape'. Click **OK**.
6	From the **File** menu, choose **Print...**
7	Choose the printer you wish to print to and click the **OK** button.

Additional Resources:

- Downloading reports

ILL statistics and reports

DOCLINE participants can access quarterly and annual reports produced by NLM.

Quarterly reports include summary and detailed information about each participant's activity as a borrower and a lender. The reports on ILL and Loansome Doc order activity include such information as the total number of requests borrowed and received, the number filled and not filled, and throughput time.

Quarterly reports with annual summaries:

- Report 1-1A: Summary DOCLINE Borrower Statistics
- Report 1-1B: Summary DOCLINE Lender Statistics
- Report 1-2A: Detailed DOCLINE Borrower Statistics
- Report 1-2B: Detailed DOCLINE Lender Statistics

Quarterly reports:

- Report 5-1A: Loansome Doc Detailed Lender Statistics
- Report 5-1B: Loansome Doc Throughput Report

Available on demand:

- Report 1-7: Library Routing Table and M/A/N Map cells containing my LIBID

Semiannual reports:

- Report 1-8A and 1-8B: Ranked List of Serial Titles Requested - Borrower
- Report 1-8C and 1-8D: Ranked List of Serial Titles Requested - Lender

Serial Holdings

Serial Holdings Overview

Serial Holdings contains the holdings data for medical libraries across the United States, Canada, and Mexico that participate in DOCLINE. DOCLINE provides users with the ability to add, update, and delete holdings for serials held by their own library, and view holdings for a specific serial owned by other libraries.

As DOCLINE is an interlibrary loan system, holdings reported within DOCLINE are for serials from which libraries can provide interlibrary loan service. Electronic serials, including those available free online, should not be reported in DOCLINE **unless** the library has a specific license to provide interlibrary loan service from that title.

Serial Holdings records are the key to DOCLINE routing. DOCLINE uses the holdings records to determine which libraries report owning the requested materials. Once holdings are determined, DOCLINE then uses the lender's service profile and the requestor's borrowing preferences to determine which lending libraries to route the request to.

Serial Records contain the following bibliographic information:

a. Journal Title
b. NLM Unique ID
c. ISSN
d. Publisher
e. Place of Publication
f. Publication Dates
g. Frequency
h. Continuation Notes (if available)

Individual Holdings records consist of:

a. Physical Format
b. Acquisition Status
c. Retention Policy
d. Holdings Owned
e. Completeness
f. Commitment Level

What do you want to do?

- Add Serial Holdings
- Delete Holdings
- Find Serial Holdings
- Generate Serial Holdings Reports
- Modify Holdings
- Show All My Holdings

Generating Serial Holdings Reports

Serial Holdings Report Overview

Individual Library Reports (Holdings by Library, Holdings Not Updated within One Year, Holdings Outside of Publication Date, Level 2 Holdings, National Print Retention Titles, NLM Serial Title Changes)

- Each user with rights to Serial Holdings Reports will have the ability to run each of the individual library reports.
- These reports will be current as of the time that they are run.
- When the user clicks CREATE REPORT, the following happens:
  a. The report is placed into a queue. Reports are generated every hour and are run in the order they are submitted.
  b. When the report is ready, the user will see a Serial Holdings Report Ready message in the DOCLINE message area. The message area displays when the user initially logs into DOCLINE; from within DOCLINE, the user can display messages at any time by clicking on the Home option on the DOCLINE menu bar. Once the report has been viewed, the message will disappear from the DOCLINE 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.
- Report fields with more than 255 characters will be truncated to 255 characters. If, for instance, the title is 260 characters, only the first 255 will be included in the report.
- Sort Order: Individual Library Reports that have completed will display first under the header Completed Reports. The reports are sorted by title.

Report Name	Description
Holdings by Library	A report of all holdings for a single library. A user can produce this report for any library for which

Report Name	Description
	he/she has been granted rights. The data is sorted by title. The user can choose the fields to display in the report as well as the format of the report. The fields that can be selected consist of: Acquisition Status, City, Commitment Level, Completeness, Continuation Notes, Date Added/Modified, Encoding Level, Frequency, Holdings, ISSN, NLM Unique ID, OCLC Number, Physical Format, Place of Publication, Publication Date, Publisher, Retention Policy, Title, and Title Abbreviation. The formats consist of HTML, CSV (Comma delimited; to import into Excel, Access, etc.) and - MARC 21 (to import into a library system that uses MARC 21 format). To see more information about this report, look at Holdings by 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, libraries should update their serial holdings as necessary. If holdings are accurate, the library should update the Holdings Last Reviewed date in the Serial Holdings section of the Membership page of the Institution record. When a holdings record is updated, the Update Date field is updated in the Serials Holdings section of the Membership page of the Institution record. There are two types of updating: Online and Batch. The dates associated with both of these types are checked; the Holdings Last Reviewed field is also checked. If the last time a holdings record was updated, either by batch or online, was more than one year prior to the date the report was run AND the Holdings Last Reviewed field is blank or more than one year prior to the date the report was run, information about this library will appear on the report. A user can produce this report for any single library, library group, and/or state/province for which he/she has been granted rights. When running the report for a library group or

Report Name	Description
	state/province, the data is sorted by LIBID. The fields displayed are: Library Name, City, State/Province, LIBID, Number of Level 3 Holdings, Number of Level 2 Holdings, Last Online Update Date, Last Online Updated by, Last Batch Update Date, Last Batch Updated by, and Date Last Reviewed. Any fields that have no data (other than the Date Last Reviewed on) will not display. To see more information about this report, look at Holdings Not Updated within One Year.
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. In MARC, the beginning date is taken from the 008 field 7th through 10th positions and the ending date is taken from the 008 11th through 14th positions (**Note:** In MARC, the positions for the 008 start at 0). For example, if the bibliographic record said that the serial was published from 1980 to 1995 and the library reported holdings for 1963 to 1990 that holdings record would appear on this report. A user can produce this report for any single library, library group, and/or state/province for which he/she has been granted rights. When running the report for a library group or state/province, the data is sorted by LIBID and then by Title. The fields displayed are: Library Name, City, State/Province, LIBID, Title, NLM Unique ID, Publisher, Place of Publication, Publication Date, Frequency, Continuation Notes, Holdings, Retention Policy, and Acquisition Status. Any fields that have no data will not display. To see more information about this report, look at Holdings Outside of Publication Date.
Level 2 Holdings	A report that lists holdings that are at level 2 according to ANSI/NISO Z39.71-1999 standard. These holdings do not list specific retention policy or volume or year holdings information. Since both DOCLINE and DOCLINE users cannot tell what is held, it is important to add holdings information to

Report Name	Description
	these records as soon as possible. Level 2 holdings are created when a title changes, the publication dates of the new title contain "u" for unknown, the library is currently receiving the old title, AND the library reports permanently retained holdings on the old title. For more information on title changes and how they affect holdings within Serial Holdings see the FAQ What happens to my holdings when a title changes? A user can produce this report for any single library, library group, and/or state/province for which he/she has been granted rights. When running the report for a library group or state/province, the data is sorted by LIBID and then by Title. The fields displayed are: Library Name, City, State/Province, LIBID, Title, NLM Unique ID, ISSN, Publisher, Place of Publication, Publication Date, Frequency, Continuation Notes, Retention Policy, and Acquisition Status. Any fields that have no data will not display. To see more information about this report, look at Level 2 Holdings.
National Print Retention Titles	A report of print holdings for titles which library has committed to retain for the National Print Retention Program (MedPrint). A user can produce this report for any library for which they have been granted rights. The report is sorted by title. The user can choose the fields to display in the report and also the output format of the report, HTML or CSV (comma delimited for import into a program like Excel). The fields that can be selected include: Acquisition Status, Completeness, Continuation Notes, Date Added/Modified, Encoding Level, Frequency, Holdings, ISSN, NLM Unique ID, OCLC Number, Physical Format, Place of Publication, Publication Date, Publisher, Retention Policy, Title, and Title Abbreviation.

Report Name	Description
	To see more information about this report, look at National Print Retention Titles by Library.
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 the library. The user can choose to find records in the last 1 month, 3 months, or 6 months. Each evening a program runs that identifies title changes for that day. Based upon beginning publication date, ending publication date, and holdings within Serial Holdings, new holdings records are created for the new title. It is up to each library to close holdings for the old titles and verify the holdings for the new titles. For more information on title changes and how they affect holdings within Serial Holdings see the FAQ What happens to my holdings when a title changes? A user can produce this report for any single library, library group, and/or state/province for which he/she has been granted rights. When running the report for a library group or state/province, the data is sorted by Title and then by LIBID. The fields displayed are: Library Name, City, State/Province, LIBID, Title, NLM Unique ID, Publisher, Place of Publication, Publication Date, Frequency, Continuation Notes, Holdings, Retention Policy, and Acquisition Status. Any fields that have no data will not display. To see more information about this report, look at NLM Serial Title Changes.

Union List Products (Holdings by Library Group and Holdings by State/Province):

Report Name	Description
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. A user can view the holdings for library groups to which his/her library group belongs. Serial

Report Name	Description
	Holdings Coordinators, who have rights to update holdings for libraries other than their own, can view holdings for all appropriate library groups. Union Lists are viewable from the DOCLINE menu, Serials Holdings tab, Reports option. Under the Completed Reports header, Holdings by Library Group Union Lists for groups that the user is authorized to view will display alphabetically by title following any user generated individual reports and any error reports. Reports are in both HTML and CSV (comma delimited; to import into Excel, Access, etc.) format. The data is sorted by Title and then by Institutions Document Delivery State/Province, Document Delivery City, and Document Delivery Institution Name. If the reporting institution has not updated its Institutions record to reflect upper and lower case, the city will display in CAPITAL letters and you may see repeats of the city name; we strongly suggest that each library appropriately update their Institutions record. The fields displayed are: Library Group Name (in report header for standard format reports), Date Union List Last Updated (in report header for standard format reports), Title, NLM Unique ID, ISSN, Publisher, Place of Publication, Publication Date, Frequency, Continuation Notes, State/Province, City, Institution Name, and Holdings. Any fields that have no data will not display. For additional information, see Union List Field Definitions. NLM updates union lists products quarterly. Library Group union lists are updated the weekend following the first Friday in January, April, July, and October. For additional information, see the FAQ on the Availability of

Report Name	Description
	Union List Products. If a new library group is created after the union list has run for the quarter, the listing will not be added until the following quarter. If a change is needed to library group membership or a new library group needs to be created, contact your Regional DOCLINE Coordinator (a listing of Coordinators is located at the end of the SERHOLD Fact Sheet).
Holdings by State/Province	A report of holdings for a U.S. state, U.S. territory, or Canadian province. A user can view the holdings for their library's state or province. Serial Holdings Coordinators, who have rights to update holdings for libraries other than their own, can view holdings for all appropriate states/provinces. Union Lists are viewable from the DOCLINE menu, Serial Holdings tab, Reports Option. Under the Completed Reports header, Holdings by State/Province that the user is authorized to view will display alphabetically by title following any user generated individual reports, error reports, and Holdings by Library Group union lists. Reports are in both HTML and CSV (comma delimited; to import into Excel, Access, etc.) format. The data is sorted by Title and then by Document Delivery City, and Document Delivery Institution Name. The fields displayed are: State/Province (in report header for HTML reports), Date Union List Last Updated (in report header for HTML reports), Title, NLM Unique ID, ISSN, Publisher, Place of Publication, Publication Date, Frequency, Continuation Notes, City, Institution Name, and Holdings. Any fields that have no data will not display. For additional information, see Union List Field Definitions.

Report Name	Description
	NLM updates union lists products quarterly. State/Province union lists are updated the weekend following the first Friday in February, May, August, and November. For additional information, see the FAQ on the Availability of Union List Products.

Additional resources:

- Show All My Holdings

MARC 21 Format - Overview

MARC 21 Format:

The MARC 21 formats are widely used standards for the representation and exchange of data in machine-readable form. The data output from DOCLINE in MARC 21 format is holdings data with some bibliographic data originally from NLM's online public access catalog, LocatorPlus. Data output in MARC 21 format can be used by libraries that have the ability to import such data into a system that reads MARC 21 format.

Data Output:
For a Single Library: Sort based upon the Bibliographic Sort Serial Name. The holdings record appears first followed by the bibliographic record.

Special Characters:
Blank: ASCII character 20(hex)
Field Terminator (FT): ASCII control character 1E(hex) is used to terminate the Directory and each variable field within a record.
Record Terminator (RT): ASCII control character 1D(hex) is used to terminate a record. It follows the field terminator of the last data field.
Fill Character: Hex "7C" - designated at | in the Holdings Data and the Bibliographic Data.

Additional resources:
- MARC 21 Format - Holdings Data
- MARC 21 Format - Bibliographic Data

MARC 21 Format - Bibliographic Data

Bibliographic Data:

Field Name	MARC Tag	Position	Indicator 1	Indicator 2	Sub-field	Value
Logical Record Length	Leader	00-04				Count of length of entire bibliographic record including record terminator
Record Status	Leader	05				n for all records
Type of record	Leader	06				a
Bibliographic level	Leader	07				s
Type of control	Leader	08				blank
Character Coding Scheme	Leader	09				blank
Indicator Count	Leader	10				2
Subfield code count	Leader	11				2
Base address of data	Leader	12-16				Length of leader plus length of directory including the field terminator at the end of the directory
Encoding level	Leader	17				z
Descriptive cataloging form	Leader	18				u
Linked record requirement	Leader	19				blank
Length of the length-of-field position	Leader	20				4
Length of the starting-character-position portion	Leader	21				5
Length of the implementation-defined portion	Leader	22				0
Undefined	Leader	23				0
Tag	Directory	00-02				
Field Length	Directory	03-06				Note: Right justified with unused portions containing zeroes. Field terminator

Field Name	MARC Tag	Position	Indicator 1	Indicator 2	Sub-field	Value
						character is included in the length.
Starting Character Position	Directory	07-11				Note: Right justified with unused portions containing zeroes. The Directory follows the Leader and repeats for each field. Directory is terminated with a field terminator.
Control Number	001					*NLM Unique ID*
Control Number Identifier	003					DNLM
Date and Time of Latest Transaction	005					*ILS Updated Timestamp* in yyyymmddhhmmss.f format
Date entered on file	008	00-05				*ILS Created Timestamp* in yymmdd format
Type of date/Publication status	008	06				c = currently published d = ceased publication If *Publication End Year* is blank, value is c. If Publication End Year is not blank, value is d.
Date 1	008	07-10				*Publication First Year*
Date 2	008	11-14				*Publication End Year If blank, use the value 9999.*
Place of publication, production, or execution	008	15-17				*Place of Publication Code*
Frequency	008	18				*Publication Frequency Code*
Regularity	008	19				|
ISSN Center	008	20				|
Type of serial	008	21				|
Form of original item	008	22				|
Form of original item	008	23				|
Nature of entire work	008	24				|

Field Name	MARC Tag	Position	Indicator 1	Indicator 2	Sub-field	Value
Nature of contents	008	25-27				|||
Government publication	008	28				|
Conference publication	008	29				|
Undefined	008	30-32				|||
Original alphabet or script of title	008	33				|
Successive/latest entry	008	34				|
Language	008	35-37				|||
Modified Record	008	38				|
Cataloging source	008	30				blank
ISSN	022				a	*ISSN* Note: Repeatable field with a separate 022 for each ISSN.
OCLC Number	035				a	*OCLC ID* Note: Data is preceded by the text (OCoLC). Repeatable field with a separate 035 for each OCLC Number. Example: (OCoLC)012345678
Other NLM Unique IDs	035				a	*Seq* Note: Data is preceded by the text (DNLM) and followed by the text (s). Example: (DNLM)S30545600(s)
Title	245 or 130		0	Number of non-filing characters	a	*Serial Name* Note: The title that appears in Serial Holdings is created from various fields in the MARC record -- If a Uniform Title (130) is present without a subfield l (the letter "l"), the title is the 130. Otherwise, the title comes from the 245 subfield a, b, c, h, n, and p followed by a space followed by the subfields of the

Field Name	MARC Tag	Position	Indicator 1	Indicator 2	Sub-field	Value
						Corporate Name (110) or Conference Name (111), if they exist.
Place of Publication	260				a	*Publisher Location* Note: The Place of Publication is taken from the Current Place of Publication (269 subfield a) if present; otherwise, it is taken from the Place of Publication (260 subfield a)
Publisher	260				b	*Publisher* Note: The Publisher is taken from the Current Publisher (269 subfield b) if present; otherwise, it is taken from the Publisher (260 subfield b).
Continuation Notes	780/78					*Continuation Notes* (See 780/785 specs below)

<u>780-785 Instructions</u>:

If Note starts with:	Field is:	First Indicator Value is:	Second Indicator Value is:
Continues:	780	0	0
Continues in part:	780	0	1
Supersedes:	780	0	2
Supersedes in part:	780	0	3
Absorbed:	780	0	5
Absorbed in part:	780	0	6
Separated from:	780	0	7
Continued by:	785	0	0
Continued in part by:	785	0	1
Superseded by:	785	0	2
Superseded in part by:	785	0	3
Absorbed by:	785	0	4
Absorbed in part by:	785	0	5

If Note starts with:	Field is:	First Indicator Value is:	Second Indicator Value is:
Changed back to:	785	0	8

Additional Resources:

- MARC 21 Format - Overview
- MARC 21 Format - Holdings Data

MARC 21 Format - Holdings Data

Holdings Data:

Field Name	MARC Tag	Position	Indicator 1	Indicator 2	Subfield	Value
Logical Record Length	Leader	00-04				Count of length of entire holdings record including record terminator
Record Status	Leader	05				**n** for all records
Type of record	Leader	06				y
Undefined	Leader	07				blank
Undefined	Leader	08				blank
Character Coding Scheme	Leader	09				blank
Indicator Count	Leader	10				2
Subfield code count	Leader	11				2
Base address of data	Leader	12-16				Length of leader plus length of directory including the field terminator at the end of the directory
Encoding Level	Leader	17				***Encoding_Level***
Item information in record	Leader	18				n
Undefined Character Position	Leader	19				blank

Field Name	MARC Tag	Position	Indicator 1	Indicator 2	Subfield	Value
Length of the length-of-field position	Leader	20				4
Length of the starting-character-position portion	Leader	21				5
Length of the implementation-defined portion	Leader	22				0
Undefined	Leader	23				0
Tag	Directory	00-02				
Field Length	Directory	03-06				**Note:** Right justified with unused portions containing zeroes. Field terminator character is included in the length.
Starting Character Position	Directory	07-11				**Note:** Right justified with unused portions containing zeroes. The Directory follows the Leader. Directory is terminated with a field terminator.
Control Number for Related Bibliographic	004					***NLM_Unique_ID***
Record						

Field Name	MARC Tag	Position	Indicator 1	Indicator 2	Subfield	Value
Date and Time of Latest Transaction	005					***Last_Update_Date*** in yyyymmddhhmmss.f format
Date entered on file	008	00-05				***Date_Entered*** in yymmdd format
Receipt or acquisition status	008	06				***Acquisition*** Valid Serial Holdings values: 0 -- Unknown 4 -- Currently received 5 -- Not currently received
Method of acquisition	008	07				u
Intent to cancel date	008	08-11				blank
General retention policy	008	12				***Retention_Policy*** 6 -- Retained for a limited period 8 -- Permanently retained

Field Name	MARC Tag	Position	Indicator 1	Indicator 2	Subfield	Value
Specific retention policy	008	13-15				If ***Retention_Policy*** is 6, then convert as follows: position 13 = *Spec_Reten_Policy* (1 for latest) position 14 = *Spec_Reten_Year* if 9 or less; blank if 10 or more (place data in the 852 $z in this case) position 15 = *Spec_Reten_Unit* unit type (y,m, or e) 852 $z = *Spec_Reten_Year* is 10 or more. Policy type: 1 -- latest Number of Units: 1-9 [If no. of units retained exceeds 9, give no. in 852 $x (nonpublic note) or $z (public note)] Unit type: y - - year(s) m - - month(s) e - - edition(s)

Field Name	MARC Tag	Position	Indicator 1	Indicator 2	Subfield	Value
Completeness	008	16				***Completeness*** 0 -- Other [limited retention; or, no estimate of completeness] 1 -- Complete [95% or more] 2 -- Incomplete [50-94%] 3 -- Scattered holdings
Number of copies reported	008	17-19				001
Lending Policy	008	20				u
Reproduction policy	008	21				u
Language	008	22-24				eng
Separate or composite copy report	008	25				0
Date of report	008	26-31				***Last_Update_Date*** in yymmdd format
						Textual value of *Physical Format*

Field Name	MARC Tag	Position	Indicator 1	Indicator 2	Subfield	Value
Location Holding institution or library	852		[blank] -- No info provided	[blank] -- No info	a	***LIBID***
Nonpublic note					x	***Commitment*** Z -- No special commitment to retain title N -- Will hold title for national commitment ***Spec_Reten_Year*** when value is 10 or more and *Retention_Policy* is 6.
Public note					z	
Captions and pattern for basic volumes	853		Compressibility and expandability **0** -- Cannot compress or expand	Caption evaluation **3** -- Unverified, may not have all levels present	8 a i	Link no. -- for sequencing of piece holdings; changes in caption and pattern may require new link numbers. Combined with a sequence number in 86X fields. 1 If volumes present: **v.** If years present: **(year)** See 853/863

Field Name	MARC Tag	Position	Indicator 1	Indicator 2	Subfield	Value
						Instructions below.

Field Name	MARC Tag	Position	Indicator 1	Indicator 2	Subfield	Value
Enumeration & chronology of basic volumes	863	***Encoding_Level*** Field encoding level 2 -- Holdings Level 2 3 -- Holdings Level 3	Form of holdings **0** -- Compressed [i.e., expressed as a range]		8 a i	Link & sequence number [1.1, 1.2, 1.3, etc.; link number may be higher number if units being coded are not the first published in the title] Each Holdings.Hold_ID will get a separate sequence number. First level of enumeration [matches caption in 853 $a] ***Begin_Volume*** (if exists) – (if **End_Volume** for that Holdings record is not blank OR the Acquisition is 4 and this is the highest volume) ***End_Volume*** (if exists and Begin_Volume and End_Volume are not identical) First level of chronology [matches chronology in 853 $i] ***Begin_Year*** (if exists) / followed by Cross_Begin_Year (only if exists; do not use / if no ***Cross_Begin_Year***) - (if End_Year for that Holdings record is not blank OR the Acquisition is 4

853/863 Instructions:
If General Retention Policy (008 position 12) is 6, do not create an 853/863. If Encoding Level (Leader position 17) is 2, do not create an 853/863. Otherwise, the holdings will have to be analyzed to determine if volume and/or year information is present.

$8 is a linking field which maps to the appropriate caption (853) and also orders the data from oldest to newest. It is possible to have more than 10 863s; in that case, the linking numbers could go to two decimals ($8 1.10, $8 1.11, $8 1.12, etc.).

Each separate Holdings ID will be placed in a separate 863. Volumes are placed in $a and years are placed in $i.

Additional Resources:
- MARC 21 Format - Overview
- MARC 21 Format - Bibliographic Data

NLM Serial Title Changes Report Overview

This report identifies new serial holdings records that were created by NLM title changes and that have not been updated by the library. The user can choose to find records in the last 1 month, 3 months, or 6 months. Each evening a program runs that identifies title changes for that day. Based upon beginning publication date, ending publication date, and holdings within serial holdings, new holdings records are created for the new title. It is up to each library to close holdings for the old titles and verify the holdings for the new titles. For more information on title changes and how they affect holdings within Serial Holdings, see the Serial Holdings FAQ: What happens to my holdings when a title changes?

A user can produce this report for any library for which he/she has rights to run the report (these rights are established by your DOCLINE Coordinator), a library group to which he/she belongs, or for his/her own state or province. For Serial Holdings Coordinators who have rights to more than one state/province, multiple states or provinces will display. Multiple Libraries, Library Groups and/or State/Provinces cannot be selected. Regional DOCLINE Coordinators can produce this report for their region.

The report is sorted by LIBID and then by Title. The fields displayed are: Library Name, City, State/Province, LIBID, Title, NLM Unique ID, Publisher, Place of Publication, Publication Date, Frequency, Continuation Notes, Holdings, Retention Policy, and Acquisition Status. Any fields that have no data will not display.

Procedure for creating a NLM Serial Title Changes Report:

STEP	ACTION
1	Select **Serial Holdings** from the DOCLINE main menu.
2	Select **Reports.**
3	Click the **NLM Serial Title Changes** hyperlink in the left sidebar.

STEP	ACTION
4	Click on the appropriate radio button for LIBID, Library Group, Region, or State/Province. **Note:** The selection that displays is based upon the libraries for which the user has report and/or update rights and the library groups and state/province(s) to which those libraries belong. Region will only appear for Regional DOCLINE Coordinators.
5	LIBID (report rights for only one library): proceed to step 6. LIBID (report rights for more than one library): Input LIBID. Library Group, State/Province, or Region: Click on the appropriate radio button for the report you want to run.
6	Click **Create Report**. **Note:** If you have a long list of report selections, you may have to scroll to see the Create Report button.

When the user clicks **Create Report**, the following happens:

a. The report is placed into a queue. Reports are generated every hour and are run in the order they are submitted.
b. These reports will be current as of the time that they are run.
c. When the report is ready, the user will see a Serial Holdings Report Ready message in the DOCLINE message area. Once the report has been viewed, the message is removed from the DOCLINE message area.
d. Each report will be deleted from the DOCLINE system one week after creation even if the report has not been viewed.
e. Reports are accessible ONLY to the user that submits them (e.g., if I submit a report when I am logged in with USERID XXX61, I must log in as USERID XXX61 in order to retrieve the report).
f. If a second report of the same type (ex. NLM Serial Title Changes) for the same library is requested by the same user, the first report will be replaced by the second report.

g. Report fields with more than 255 characters will be truncated to 255 characters. If, for instance, the title is 260 characters, only the first 255 will be included in the report.

Review Reports Overview

The Review Reports screen displays all pending and completed reports that have been submitted by the user as well as reports that are system generated and union list products. To view a report, click the Report Name hyperlink.

Definitions

Field	Definition
Action	The Cancel button will display if the report is pending. "Running" will display if the pending report is running. The Delete button will display for completed individual reports or error reports. "Generated Quarterly" will display for union lists and reports that are generated by DOCLINE quarterly. Listed reports will be replaced by the latest reports quarterly.
Completion Date	Date the report was created.
Estimated Completion	The date and time the report is estimated to begin running for Pending Reports. The actual completion time will depend on how many other reports have been requested at the same time.
Expiration Date	Date Report will be removed by the system.
Number of Records	Number of records in the report.
Report Name	The name of the report.
Time Requested	The date and time the report was requested by the user for Pending Reports.

Buttons

Button	Button Definition
Cancel	Cancels the creation of the pending report.
Delete	Deletes the completed report.

Additional Resources:

- Downloading reports as ASCII file
- Downloading Serial Holdings reports
- Viewing and printing Serial Holdings reports

Downloading Serial Holdings Reports

To save a Serial Holdings report to a word processing program such as Word, do the following:

STEP	Action
1	Select **Serial Holdings** from the DOCLINE main menu.
2	Select **Reports**.
3	Click **Review Reports** in the left sidebar.
4	Click on the appropriate Report Name hyperlink.
5	After the report displays, right click on the report.
6	Select the **Select All** option.
7	Right click.
8	Select the **Copy** option.
9	Open a word processing package (e.g., Word, WordPerfect).
10	Use the word processing package features to paste the data and then to format and print the data.

Additional Resources:

- Downloading reports as ASCII file
- Viewing and printing Serial Holdings reports

Downloading reports as ASCII file

This option is only available for the Holdings by Library Report if the CSV format is selected when submitting the report.

Downloading using Internet Explorer (IE):

STEP	Action
1	Select **Serial Holdings** from the DOCLINE main menu.
2	Select **Reports**.
3	Click **Review Reports** in the left sidebar.
4	Under Completed Reports in the main window, right click on the appropriate Report Name hyperlink.
5	Select **Save Target As**.
6	Type a file name. Example: MDUGHI.txt
7	Select **Text document** from the 'Save As Type' drop-down list.
8	Select **Save**.
9	From the Download Complete Message box, click on the **Close** button.

Downloading using Firefox:

STEP	Action
1	Select **Serial Holdings** from the DOCLINE main menu.
2	Select **Reports**.
3	Click **Review Reports** in the left sidebar.
4	Under Completed Reports in the main window, right click on the appropriate Report Name hyperlink.
5	Select **Save Link As**.
6	Type a file name. Example: MDUGHI.txt
7	Select **Save**.
8	Close the Download Message box.

Additional Resources:

- Downloading Serial Holdings reports
- Viewing and printing Serial Holdings reports

Viewing and printing Serial Holdings reports

Viewing Reports

STEP	Action
1	Select **Serial Holdings** from the DOCLINE main menu.
2	Select **Reports**.
3	Click **Review Reports** in the left sidebar.
4	Under Completed Reports in the main window, click on the appropriate Report Name hyperlink.

Printing Reports

Printing with Internet Explorer (IE):

STEP	Action
1	Select **Serial Holdings** from the DOCLINE main menu.
2	Select **Reports**.
3	Click **Review Reports** in the left sidebar.
4	Under Completed Reports in the main window, click on the appropriate Report Name hyperlink.
5	After the report displays, use your browser to print the report.

Printing with Firefox:

STEP	Action
1	Select **Serial Holdings** from the DOCLINE main menu.
2	Select **Reports**.
3	Click **Review Reports** in the left sidebar.
4	Under Completed Reports in the main window, click on the appropriate Report Name hyperlink.
5	After the report displays, use your browser to print the report.

Additional Resources:

- Show All My Holdings
- Downloading reports as ASCII file
- Downloading Serial Holdings reports

Holdings by Library Report

This report lists the holdings for an individual library. A user can produce a holdings report for any library for which they have report rights (these rights are granted by DOCLINE Coordinators). The report can be created in HTML, CSV (comma delimited; to import into Excel, Access, etc.), and MARC 21 format. For the HTML and CSV format types, the user can accept the fields that are selected by default, and/or select additional fields to display in the report. The report is sorted by serial title.

To submit a **Holdings by Library** report, do the following:

STEP	Action
1	Select **Serial Holdings** from the DOCLINE main menu.
2	Select **Reports**. **Note:** If you do not have rights to create reports within Serial Holdings, you will not have the Serial Holdings Reports menu option.
3	Click the **Holdings by Library** hyperlink in the left sidebar.
4	Select the desired **Report Format Type**. **HTML** is the default format which displays the report within DOCLINE for viewing and printing. **CSV** generates the report in comma delimited file format which can be used for importing into applications like Excel or Access. The Field Delimiter is a comma (,) and the Text Delimiter is double quotes (“). The first row consists of field names. **MARC 21** generates the report into a file defined by MARC 21 standard. The file can be imported into your library system.

STEP	Action
5	**Select Report Fields:** The data elements Holdings, NLM Unique ID, and Title are selected by default. Select or remove report fields as desired by clicking on the checkbox in front of the desired fields. **Note:** If selected format type is MARC 21, all of the fields are included in the report.
6	Click **Create Report**.

Notes:

a. Once the user clicks Create Report, the report is placed into a queue. Reports are generated every hour and are run in the order they are submitted.
b. The data in these reports is current as of the time that they are run.
c. When the report is ready, the user will see a Serial Holdings Report Ready message in the DOCLINE home page message area. Once the report has been viewed, the message is removed from the DOCLINE message area.
d. Each report will be deleted from the DOCLINE system one week after creation even if the report has not been viewed.
e. Reports are accessible only to the user that submits them (e.g., if I submit a report when I am logged in with USERID XXX61, I must log in as USERID XXX61 in order to retrieve the report).
f. If a second report of Holdings by Library) for the same library is requested by the same user, the first report will be replaced by the second report.
g. For delimited format, report fields with more than 255 characters will be truncated to 255 characters. If, for instance, the title is 260 characters, only the first 255 will be included in the report.

The bibliographic and holdings information is sorted by Title. The bibliographic and holdings fields display in the following order:

- Title
- Title Abbreviation
- NLM Unique ID
- OCLC ID
- ISSN
- Publisher
- Place of Publication

- Publication Date
- Frequency
- Continuation Notes
- BLANK LINE between Bibliographic Information and Holdings Information
- Holdings
- Retention Policy
- Acquisition Status
- Physical Format
- Completeness
- Commitment
- Update ID
- Date Added/Modified
- Encoding Level

Additional resources:

- Serial Report Field Definitions
- MARC 21 Format - Holdings Data
- MARC 21 Format - Bibliographic Data

National Print Retention Titles by Library Report

This report lists the print holdings for titles that the library has committed to retain for the National Print Retention Program, MedPrint.

To generate a **National Print Retention Titles by Library** report, do the following:

STEP	Action
1	Select **Serial Holdings** from the DOCLINE main menu.
2	Select **Reports**. **Note:** If you do not have rights to create reports within Serial Holdings. Contact your Regional Medical Library for access to reports.
3	Click the **National Print Retention Titles** hyperlink in the left sidebar.
4	Select the desired **Report Format Type**. **HTML** is the default format which displays the report within DOCLINE for viewing and printing. **CSV** generates the report in comma delimited file format which can be used for importing into applications like Excel or Access. The Field Delimiter is a comma (,) and the Text Delimiter is double quotes (“). The first row of the file consists of field names.
5	**Select Report Fields:** The default data elements are: Completeness, Holdings, NLM Unique ID, Publication Date and Title. Select additional data elements as desired by clicking on the checkbox in front of the report fields. This report will be sorted by title.
6	Click **CREATE REPORT**.

Notes:

a. Once the user clicks Create Report, the report is placed into a queue. Reports are generated every hour and are run in the order they are submitted.
b. The data in these reports is current as of the time that they are run.
c. When the report is ready, the user will see a Serial Holdings Report Ready message in the DOCLINE home page message area. Once the report has been viewed, the message is removed from the DOCLINE message area.
d. Each report will be deleted from the DOCLINE system one week after creation even if the report has not been viewed.
e. Reports are accessible only to the user that submits them.
f. If a second report of the same type (e.g., Holdings by Library) for the same library is requested by the same user, the first report will be replaced by the second report.
g. For delimited format, report fields with more than 255 characters will be truncated to 255 characters. If, for instance, the title is 260 characters, only the first 255 will be included in the report.

Additional resources:

- Serial Report Field Definitions

Holdings by Library Report Format Types

Report Format Type

Report Format Option	Definition
HTML	A viewable/printable format that lists the selected field names followed by the data.
CSV	Data in a format that can be saved and then imported into other software programs such as Microsoft Excel or Access.
MARC 21	Data in a format that can be saved and then imported into a library system that uses MARC 21 format.

Serial Holdings Level 2 Holdings Report Overview

This report lists the holdings that are at Encoding Level 2 according to the ANSI/NISO Z39.71-1999 standard. These holdings do not list volume or year holdings information. Since neither DOCLINE users nor the DOCLINE routing algorithm can tell what is held, it is important to add holdings information to these records as soon as possible.

A user can produce a Level 2 holdings report for any library for which he/she has rights to update holdings, a library group to which he/she belongs, or for his/her own state or province. For Serial Holdings Coordinators who have rights to more than one state/province, multiple states or provinces will display. Only one library, library group, and/or state/province can be selected for the report. Regional DOCLINE Coordinators can produce this report for their region.

The report is sorted by LIBID and then by Title. The fields displayed are: Library Name, City, State/Province, LIBID, Title, NLM Unique ID, ISSN, Publisher, Place of Publication, Publication Date, Frequency, Continuation Notes, Retention Policy, and Acquisition Status. Any fields that have no data will not display.

Procedures for creating a Level 2 Holdings Report:

STEP	Action
1	Select **Serial Holdings** the DOCLINE main menu.
2	Select **Reports.** **NOTE:** If you do not have rights to create reports within Serial Holdings, you will not have the Serial Holdings Reports menu option.
3	Click the **Level 2 Holdings** hyperlink in the left sidebar under the Create Reports header.
4	Click on the appropriate radio button for LIBID, Library Group, Region (only Regional Serial Holdings Coordinators will have this option), or State/Province.

STEP	Action
5	LIBID (report rights for only one library): proceed to step 6. LIBID (report rights for more than one library): Input LIBID. Library Group, State/Province, or Region: Click on the appropriate radio button for the report you want to run.
6	Click **Create Report**.

When the user clicks Create Report, the following happens:

1. The report is placed into a queue. Reports are generated every hour and are run in the order they are submitted.
2. These reports will be current as of the time that they are run.
3. When the report is ready, the user will see a Serial Holdings Report Ready message in the DOCLINE message area. Once the report has been viewed, the message is removed from the DOCLINE message area.
4. Each report will be deleted from the DOCLINE system one week after creation even if the report has not been viewed.
5. Reports are accessible only to the user that creates them (e.g., if I create a report when I am logged in with USERID XXX61, I must log in as USERID XXX61 in order to retrieve the report).
6. If a second report of the same type (ex. Level 2 Holdings) for the same library is requested by the same user, the first report will be replaced by the second report.
7. Report fields with more than 255 characters will be truncated to 255 characters. If, for instance, the title is 260 characters, only the first 255 will be included in the report.

Serial Holdings Libraries that have not Updated Holdings within One Year Report Overview

This report lists libraries that have not updated any of their holdings in the last year. At least once a year, libraries should update their library holdings, as necessary. If the holdings do not need to be updated, the library should review the library holdings and update the Holdings Last Reviewed field in the Serial Holdings section under Membership in the Institution record. When a holdings record is updated, the Update Date is changed in the Serial Holdings Update History field automatically. There are two types of updating: Online and Batch. The dates associated with both of these types are checked and the Holdings Last Reviewed field is also checked. In order to be listed on the report, the following must occur:

1. Holdings Last Reviewed field for the library is blank or more than one year prior to the date of the report; AND,
2. Last time any holdings record for the library was updated online is blank or more than one year prior to the date of the report; AND,
3. Last time any holdings record for the library was updated via batch is blank or more than one year prior to the date of the report.

A user can produce this report for any library for which he/she has rights to run the report (these reports are established by your DOCLINE Coordinator), a library group to which they belong, or for their own state or province. For Serial Holdings Coordinators who have rights to more than one state/province, multiple states or provinces will display. Only one library, library group, and/or state/province can be selected for the report. Regional DOCLINE Coordinators can produce this report for their region.

The report is sorted by LIBID. The fields displayed are: Library Name, City, State/Province, LIBID, Number of Level 3 Holdings, Number of Level 2 Holdings, Last Online Update Date, Last Online Updated by, Last Batch Update Date, Last Batch Updated by, and Date Last Reviewed on. Any fields that have no data (other than the Date Last Reviewed on) will not display.

Procedure for creating a Holdings not Updated within One Year Report:

STEP	Action
1	Select the **Serial Holdings** option from the DOCLINE main menu.

STEP	Action
2	Select **Reports**
3	Click on the **Holdings not Updated within One Year** hyperlink in the left sidebar under the Create Reports header.
4	Click on the appropriate radio button for LIBID, Library Group, Region, or State/Province. **Note:** The selection that displays is based upon the libraries for which the user has report and/or update rights and the library groups and state/province(s) to which those libraries belong. Region will only appear for Regional DOCLINE Coordinators.
5	LIBID (report rights for only one library): proceed to step 6. LIBID (report rights for more than one library): Input LIBID. Library Group, State/Province, or Region: Click on the appropriate radio button for the report you want to run.
6	Click **Create Report**. **Note:** If you have a long list of selections, you may have to scroll to see the Create Report button.

When the user clicks Create Report, the following happens:

a. The report is placed into a queue. Reports are generated every hour and are run in the order they are submitted.
b. These reports will be current as of the time that they are run.
c. When the report is ready, the user will see a Serial Holdings Report Ready message in the DOCLINE message area. Once the report has been viewed, the message is removed from the DOCLINE message area.
d. Each report will be deleted from the DOCLINE system one week after creation even if the report has not been viewed.

e. Reports are accessible only to the user that submits them (e.g., if I create a report when I am logged in with USERID XXX61, I must log in as USERID XXX61 in order to retrieve the report).
f. If a second report of the same type (e.g. Holdings not Updated within One Year) for the same library is requested by the same user, the first report will be replaced by the second report.
g. Report fields with more than 255 characters will be truncated to 255 characters. If, for instance, the title is 260 characters, only the first 255 will be included in the report.

Holdings Outside of Publication Date Report Overview

This report lists holdings that fall outside of the publication date range listed in the bibliographic record that is located in LocatorPlus. In MARC, the beginning date is the 008 at the 7th through 10th positions and the ending date is the 008 at the 11th through 14th positions (**Note:** In MARC, the positions for the 008 start at 0). For example, if the bibliographic record said that the serial was published from 1980 to 1995 and the library reported holdings for 1963 to 1990, that holding would appear on this report.

A user can produce this report for any library for which he/she has rights to run the report a library group to which he/she belongs, or for his/her own state or province. Rights to run serial holdings reports are managed by the Regional Medical Libraries. For Serial Holdings Coordinators who have rights to more than one state/province, multiple states or provinces will display. Multiple libraries, Library Groups, and/or State/Provinces cannot be selected. Regional DOCLINE Coordinators can produce this report for their region.

The report is sorted by LIBID and then by Title. The fields displayed are: Library Name, City, State/Province, LIBID, Title, NLM Unique ID, Publisher, Place of Publication, Publication Date, Frequency, Continuation Notes, Holdings, Retention Policy, and Acquisition Status. Any fields that have no data will not display.

Procedure for submitting a Holdings Outside of Publication Date:

STEP	Action
1	Select the **Serial Holdings** option on the DOCLINE menu.
2	Select **Reports.** **Note:** If you do not have rights to create reports within Serial Holdings, you will not have the Serial Holdings Reports menu option.
3	Click on the **Holdings Outside of Publication Date** hyperlink in the left sidebar.

STEP	Action
4	Select the appropriate Search Type to generate report for your LIBID, Library Group, or State/Province.
5	If selecting LIBID, proceed to step 6. If selecting Library Group or State/Province, select the desired library group or your library's state/province.
6	Click **Create Report**.

When the user clicks Create Report, the following happens:

a. The report is placed into a queue. Reports are generated every hour and are run in the order they are submitted.
b. When the report is ready, the user will see a Serial Holdings Report Ready message in the DOCLINE message area. Once the report has been viewed, the message is removed from the DOCLINE message area.
c. Each report will be deleted from the DOCLINE system one week after creation even if the report has not been viewed.
d. These reports will be current as of the time that they are run.
e. Reports are accessible ONLY to the user that submits them (e.g., if I create a report when I am logged in with USERID XXX61, I must log in as USERID XXX61 in order to retrieve the report).
f. If a second report of the same type (ex. Holdings Outside of Publication Date) for the same library is requested by the same user, the first report will be replaced by the second report.
g. Report fields with more than 255 characters will be truncated to 255 characters. If, for instance, the title is 260 characters, only the first 255 will be included in the report.

Serial Report Field Definitions

Field	Definition
Acquisition Status	The current receipt status of the title (e.g., Currently Receiving, No Longer Acquiring)
City	The city is taken from the Document Delivery City field in the Address section of the Institution record.
Commitment	Indicates whether library will keep print holdings of title for the national print retention program.
Completeness	General guidance as to the extent of the institution's holdings. The value used is based on the institution's own estimation of its holdings at the time of recording. Indicates the portion of the serial's published run that is held by the library.
Continuation Notes	Notes about preceding or succeeding titles.
Frequency	The Current Publication Frequency (taken from the 310 of the MARC record) is the most recent frequency identified by NLM or the frequency that was listed on the piece when the journal was initially cataloged.
Holdings	The volumes and/or years held by the library or the number of months, years, or editions that are held if the library reports holdings for a limited time period.
ISSN	International Standard Serial Number (taken from MARC field 022 subfield a in LocatorPlus)
LIBID	The LIBID is a six character code that consists of the two-letter state or Canadian province abbreviation, a U for U.S. or a C for Canada, and three alphabetic characters.
Library Name	The library name is taken from the Document Delivery Institution field in the Address section of the Institution record. This is a required field. It will appear in all

Field	Definition
	Holdings by Library reports.
NLM Unique ID	The NLM Unique Identifier for the serial title (taken from 035 subfield 9 MARC field in LocatorPlus). This is a required field. It will appear in all Holdings by Library reports.
Place of Publication	The most recent place of publication identified by NLM or the place of publication that was listed on the piece when the journal was initially cataloged. From MARC field in LocatorPlus: Place of Publication: The place of publication that appears in Serial Holdings is created from various fields in the MARC record: If the most recent place of publication identified by NLM (269 subfield a) is present, the place of publication is the 269 subfield a. Otherwise, the place of publication comes from the place of publication listed on the piece when the journal was initially cataloged (260 subfield a).
Publication Date	The beginning publication date, a hyphen, and, if present, the ending publication date. The letter *u* in the date indicates that the date is unknown. Ex. 19uu-197u (beginning date is sometime in the 19th century; ending date is sometime during the 1970s) From MARC field in LocatorPlus: The beginning date is the 008 field at the 7th through 10th positions. The ending date is the 008 field at the 11th through 14th positions. **Note:** In MARC, the positions for the 008 field start at 0.

Field	Definition
Publisher	The most recent publisher identified by NLM or the publisher that was listed on the piece when the journal was initially cataloged. From MARC field in LocatorPlus: Publisher: The publisher that appears in Serial Holdings is created from various fields in the MARC record: If the most recent Publisher identified by NLM (269 subfield b) is present, the publisher is the 269 subfield b. Otherwise, the publisher comes from the publisher listed on the piece when the journal was initially cataloged (260 subfield b).
Retention Policy	The library's policy for keeping the title (e.g., permanently retain or retain for a limited period).
State/Province	The U.S. State or Canadian Province is taken from the Document Delivery State/Province field in the Address section of the Institution record.
Title	The serial title. This is a required field. It will appear in all Holdings by Library reports. From MARC field in LocatorPlus: The title that appears in Serial Holdings is created from various fields in the MARC record: If a Uniform Title (130) is present without a subfield l (the letter "l"), the title is the 130. Otherwise, the title comes from the 245 subfield a, b, c, h, n, and p followed by a space and then by the subfields of the Corporate Name (110) or Conference Name (111), if they exist.

Add Serial Holdings

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	On the **Update/View** Search page, enter a search term into one of the four Bibliographic Search fields.
3	On the **Update/View** Search page, under **Filters**, make sure the checkbox for **My Library** is selected.
4	Click **SEARCH**.
5	If more than one serial title is displayed, select the appropriate bibliographic title.
6	On the Holdings view page, click **Add**.
7	Select the appropriate physical **Format**.
8	Select whether the title is **Currently Received**.
9	Choose **Retention Policy**.
10	Supply appropriate detailed holdings information for retention choice. If holdings are **Permanently Retained**, enter Begin Vol. and/or Begin Year. If **Limited Period Only**, indicate the number and unit (Months, Years, or Editions) of holdings retained, e.g., Latest 5 Years.
11	Select **Completeness** Level.
12	Indicate participation in National Print Retention program.
13	Click **SAVE**.

Additional resources:

- Recording missing volumes or years (gaps)
- Routing of serial requests
- How are Filters applied in Serials Search

Add an Additional Format to a holdings record

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	On the **Update/View** Search page, enter a search term into one of the four Bibliographic Search fields.
3	Under **Filters**, make sure the checkbox for **My Library** is selected.
4	Click **SEARCH**.
5	If more than one serial title is displayed, select the appropriate bibliographic title.
6	On the Holdings record page, click **Add Format**.
7	Select appropriate physical **Format**.
8	Select whether the title is **Currently Received**.
9	Choose **Retention Policy**.
10	Supply appropriate detailed holdings information for Retention choice (must include Begin Vol. and/or Year). **Note**: For Permanently Retained, gaps are indicated by separate ranges (rows).
11	Select **Completeness** Level.
12	Indicate participation in National Print Retention program.
13	Click **SAVE**.

Additional resources:

- Recording missing volumes or years (gaps)
- Routing of serial requests
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials Search

Modify an Existing Holdings Record

The Serial Holdings Record Edit interface appears when a user clicks on the **Edit** button from the Record Display screen.

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	On the **Update/View** Search page, enter a search term into one of the four Bibliographic Search fields.
3	Under **Filters**, make sure the checkbox for **My Library** is selected.
4	Click **SEARCH**.
5	If more than one serial title is displayed select the appropriate bibliographic title.
6	Click **Edit**.
7	Make desired changes.
8	Click **SAVE**.

Additional resources:

- Routing of serial requests
- Show All My Holdings
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials Search

Record Missing Volumes or Years

Missing volumes or years in holdings (gaps) can only be reported in permanently retained holdings. For limited retention holdings, libraries can indicate missing volumes in the Completeness field, but this information is not used by the routing algorithm.

To report a gap in permanently retained holdings:

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	On the **Update/View** Search page, enter a search term into one of the four Bibliographic Search fields.
3	Under **Filters**, make sure the checkbox for **My Library** is selected.
4	Click **SEARCH**.
5	If more than one serial title is displayed select the appropriate bibliographic title.
6	Click **Edit**.
7	Input **Begin Volume** and/or **Begin Year** data and **End Vol**. and/or **End Year** for the initial set of holdings.
8	Click **Add New Range**.
9	Input **Begin Vol**. and/or **Begin Year** data for holdings after the gap.
10	Repeat steps 6 through 9 as often as necessary to record your holdings.
11	Click **SAVE**.

Additional resources:

- Routing of serial requests
- Show All My Holdings
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials Search

Delete Existing Formats

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	On the **Update/View** Search page, enter a search term into one of the four Bibliographic Search fields.
3	Under **Filters**, make sure the checkbox for **My Library** is selected.
4	Click **Search**.
5	If more than one serial title is displayed select the appropriate bibliographic title.
6	Choose format to be deleted, click **Edit**.
7	Click **DELETE FORMAT**. Delete confirmation dialog box appears.
8	Click **OK** to continue deletion.
9	Repeat steps 6-8 for each physical format to be deleted.

Additional resources:

- Modify an Existing Holdings Record
- Routing of serial requests
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials Search

Search Serial Holdings

Find libraries that are members of a particular library group and report holding a specific serial title

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	On the **Update/View** Search page, enter a search term into one of the four Bibliographic Search fields.
3	Click on the Additional Filters link.
4	On the **Filters** page, click the **Library Group** link or scroll down to the list of library groups.
5	Select the desired Library Group(s).
6	Click on the **Back to Top** link.
7	Click **ADD TO SEARCH**.
8	On the **Update/View** Search page, click **SEARCH**.

Additional resources:

- Routing of serial requests
- Find Libraries that report holding a specific serial title using top filters
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials Search

Find libraries that provide specific Delivery Methods, Interlibrary Loan Services, and/or have particular Membership Information and report holding a specific serial title

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	On the **Update/View** Search page, enter a search term into one of the four Bibliographic Search fields.
3	Click on the Additional Filters link.
4	On the additional **Filters** page in the "Delivery Options and Services" section, select the desired Delivery Method(s), Membership Information, and/or Interlibrary Loan Service(s).
5	Click **Add to Search**.
6	On the **Update/View** Search page, click **SEARCH**.

Tip: Use the **Reset Bib** button to clear all bibliographic information from previous search.

Additional resources:

- Routing of serial requests
- Searching LocatorPlus from DOCLINE Serial Holdings
- Serial Holdings Report Overview
- Find libraries that report holding a specific serial title using top Filters
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials Search

Find libraries that report holding a specific serial title by library's geographic location

To find libraries in a particular U.S. State, Canadian Province, or Region (other than your own) that report holding a specific serial title, do the following:

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	Select **Update/View**.
3	Click on the Additional Filters link.
4	On the **Filters** page, click the Location link.
5	Select the desired states, provinces, and/or regions. **Note:** To search multiple states, provinces, or regions, including your own, select them all on the Additional Filters list instead of filters on **Update/View** Search page.
6	Click on the **Back to Top** link.
7	Click **Add to Search**.
8	On the **Update/View** Search page, click **SEARCH**.

Additional resources:

- Routing of serial requests
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials Search

Find libraries that report holding a specific serial title in a particular holdings format

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	On the **Update/View** Search page, enter a search term into one of the four Bibliographic Search fields.
3	Click on the Additional Filters link.
4	On the Additional Filters page, click the **Holdings Format** link.
5	Select the desired Holdings Format(s): "Electronic Journal", "Microform", "Text", and/or "Other".
6	Click on the **Back to Top** link.
7	Click **ADD TO SEARCH**.
8	On the **Update/View** Search page, click **SEARCH**.

Tip: Use the **Reset Filters** button to clear all previously selected search limits.

Additional resources:

- Routing of serial requests
- Find libraries that report holding a specific serial title using top Filter
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials Search

Find libraries that report holding a specific serial title using top Filters

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	On the **Update/View** Search page, enter a search term into one of the four Bibliographic Search fields.
3	Select any of the **Filters** checkboxes to limit the search results, or input desired volume or year owned.
4	Click **SEARCH**.

Additional resources:

- Routing of serial requests
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials Search

Find libraries that report holding a specific year or volume of a serial title

Users can limit their searches with filters. The most commonly used filters are included on the **Update/View** Search page.

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	On the **Update/View** Search page, enter a search term into one of the four Bibliographic Search fields.
3	In the **Filters** area, input desired volume(s) and/or year(s) in the appropriate field. This will limit the search results to libraries that hold the serial title and also report holding that volume and/or year.
4	Under **Filters**, make sure the checkbox for **My Library** is not selected.
5	Click **SEARCH**.

Tip: If you enter both volume and year criteria, the search is performed as an "AND" search. For example, entering vol. 1 year 1990 means the title is searched for libraries that report owning vol. 1 **AND** year 1990.

Additional resources:

- Routing of serial requests
- Find libraries that report holding a specific serial title using top Filters
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials search

Find out if a particular library reports holding a specific serial title

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	On the **Update/View** Search page, enter a search term into one of the four Bibliographic Search fields.
3	In the Filters area, input the LIBID(s) in the **Owning LIBID(s)** field. This narrows the search to the LIBIDs entered. LIBIDs can be separated by either a comma or a space. Use Institutions search to find a LIBID if you do not know it.
4	On the **Update/View** Search page, click **SEARCH**.

Additional resources:

- Add Serial Holdings
- Routing of serial requests
- Search LocatorPlus from DOCLINE Serial Holdings
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials Search

How Filters are applied in Serial Holdings Search

When searching by title using a term that does not identify a unique title, the initial Title results screen displays a list of serials which match the bibliographic information input. Filters are applied only **after** a single serial is chosen. If searching by ISSN, NLM UI or title words that retrieve a unique bibliographic title, the search returns that individual bibliographic record and the holdings matching the selected filters.

The Filters on the Serial Holdings **Update/View** Search page are "AND'd" together in searches, with the exception of the **My Library** filter which is always "OR'd" with all other filters. The search page filters are also "AND'd" when combined in a search with Additional Filters.

For example:

If your library groups are FreeShare and AMEDD and you would like to see any holdings from FreeShare, AMEDD, or AMHL, you would **NOT** select **My Library Groups** on the Update/View Search page; instead, you would select FreeShare, AMEDD, and AMHL from the **Library Group** section of the Serial Holdings Filters page.

If your state is Maryland and you would like to see any holdings from Maryland or Virginia, you would **NOT** select **My State** on the **Update/View** Search page; instead, you would select Maryland and Virginia from the Location section of the Additional Filters page.

If you select **My Library Groups** from the search page filters and "Maryland" from the Additional Filters page, then the search returns only libraries in Maryland that are in your library groups that report owning the title.

Top Filters	Boolean Search Information
Year(s) Owned	"OR'd" with My Library and LIBID(s) "AND'd" with all other filter/grouped filters.
Volume(s) Owned	"OR'd" with My Library and LIBID(s) "AND'd" with all other filter/grouped filters.

Top Filters	Boolean Search Information
LIBID(s)	"OR'd" with all other filter/grouped filters.
My Library	"OR'd" with all other Search Filters.
My Library Groups **My Region** **My Routing Table** **Not My Routing Table** **My State/Province**	"OR'd" with My Library and LIBID(s) "AND'd" with all other filter/grouped filters.

Filters on **"Serial Holdings Additional Filters Search"** page:

Additional Filters	Boolean Search Information
Delivery Methods (Ariel, Email PDF, Odyssey, etc.)	Each Delivery Method filter is "OR'd" with all other Delivery Method Filters and then "OR'd" with My Library and LIBID(s) "AND'd" with all other filter/grouped filters.
Membership Information (DOCLINE participant, Open Library, Resource Library)	Each specific Membership Information filter is: "OR'd" with My Library and LIBID(s) "AND'd" with all other filter/grouped filters.
Interlibrary Loan (EFTS participant, Rush, Urgent Patient Care, Color)	Each specific Interlibrary Loan filter is: "OR'd" with My Library and LIBID(s) "AND'd" with all other filter/grouped filters.
Format	Each Format filter is "OR'd" with all other holdings Format Filters and then "OR'd" with My Library and LIBID(s) "AND'd" with all other filter/grouped filters.
Acquisition Status (Currently received, not currently received)	"OR'd" with My Library and LIBID(s)"AND'd" with all other filter/grouped filters.

Additional Filters	Boolean Search Information
Commitment	"OR'd" with My Library and LIBID(s)"AND'd" with all other filter/grouped filters.
State/Province	Each selected State/Province Location filter is "OR'd" with all other State/Province filters, then "OR'd" with My Library and LIBID(s) "AND'd" with all other filter/grouped filters. **Note:** If you use the State/Province Location Filter, do **NOT** use "My State/Province" since that will be "AND'd" with the State/Province filters.
Region	Each selected Region Location filter is "OR'd" with other Region filters and then "OR'd" with My Library and LIBID(s) "AND'd" with all other filter/grouped filters. **Note:** If you use the Region Location Filter, do **NOT** use "My Region" since that will be "AND'd" with the Region filters.
Library Group	Each selected Library Group filter is "OR'd" with other Library Group filters and then "OR'd" with My Library and LIBID(s) "AND'd" with all other filter/grouped filters. **Note:** If you use the Library Group Filter, do **NOT** use "My Library Group" since that will be "AND'd" with the Library Group filters.

Serial Holdings Bibliographic Search Field Definitions

The Serial Holdings Bibliographic Search Field definitions are listed below.

Field	Option/Description
Journal Title/Title Abbreviation	The title and statement of responsibility area of the bibliographic description of a work or the title as abbreviated for indexing or identification.
NLM Unique ID	The unique identifying number attached to each record in the National Library of Medicine online catalog, LocatorPlus.
ISSN	The International Standard Serial Number is a unique eight-digit number used to identify a print and/or electronic periodical publication.
OCLC Number	The unique identifying number attached to all records in the OCLC (Online Computer Library Center) cataloging and interlibrary loan database.

Additional resources:

- Find libraries that report holding a specific title using top Filters
- Routing of serial requests
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials Search

Search LocatorPlus from DOCLINE Serial Holdings

If titles cannot be retrieved using DOCLINE Serial Holdings Search, LocatorPlus offers additional bibliographic searching options and may return better search results.

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	On the **Update/View** Search page, click **LocatorPlus**.
4	Search **LocatorPlus** for the appropriate title.
5	Once the single bibliographic title has been found, click **Return to DOCLINE**.
View	Bibliographic information has been added to the Bibliographic search section of the **Update/View** Search page
6	Add filters, if desired.
7	Click **SEARCH**.

Additional resources:

- Find libraries that report holding a specific title using top Filters
- Routing of serial requests
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials Search

Show All My Holdings

Show All My Holdings

The **Show All My Holdings** button allows libraries to easily display and maintain Serial Holding Records. By limiting retrieval to certain formats, acquisition status, or serial titles starting with particular letters of the alphabet, users can review subsets of records to edit. The **Show All My Holdings** button is active only for users who have Serial Holdings update rights.

Show ALL My Holdings, with no search limits

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	On the **Update/View** Search page, under **Filters**, make sure the checkbox for **My Library** is selected.
3	Click **Show All My Holdings**.
4	All holdings are displayed showing Titles, ISSN, and Pub Dates, as well as format and volumes/years held.

Additional resources:

- Search Serial Holdings
- Update Holdings Selected by Acquisition Status
- Update Holdings in Selected Alphabetic Segments
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials search

Update Holdings Selected by Format

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	Optional: On the **Update/View** Search page, enter a search term to further limit results.
3	Under **Filters**, make sure the checkbox for **My Library** is selected.
4	Click **Additional Filters**.
5	Click **Holdings** link.
6	Select desired format.
7	Click **Add to Search**.
8	On the **Update/View** Search page, click **Show All My Holdings**.

Additional resources:

- Search Serial Holdings
- Update Holdings Selected by Acquisition Status
- Update Holdings in Selected Alphabetic Segments
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials search

Update Holdings Selected by Acquisition Status

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	Optional: On the **Update/View** Search page, enter a search term to further limit results.
3	Under **Filters**, make sure the checkbox for **My Library** is selected.
4	Click **Additional Filters**.
5	Click **Holdings** link.
6	Select desired Acquisition Status.
7	Click **Add to Search**.
8	On the **Update/View** Search page, click **Show All My Holdings**.

Additional resources:

- Search Serial Holdings
- Update Holdings by Acquisition Status
- Update Holdings in Selected Alphabetic Segments
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials Search

Update Holdings in Selected Alphabetic Segments

STEP	Action
1	Select **Serial Holdings** from the DOCLINE Main Menu.
2	On the **Update/View** Search page, enter a letter or letters into the Journal Title/Title Abbreviation field.
3	Under **Filters**, make sure the checkbox for **My Library** is selected.
4	On the **Update/View** Search page, click **Show All My Holdings**.

Additional resources:

- Search Serial Holdings
- Update Holdings Selected by Format
- Update Holdings Selected by Acquisition Status
- View Serial Holdings Search Field Definitions
- How are Filters applied in Serials Search

Institution Search

Finding an institution record by LIBID

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**.
2	In the LIBID input box, enter a complete or partial LIBID (e.g. 'VAUBIJ' or 'BIJ').
3	Press **Enter** or click **Search**.
View	A list of institutions matching your search criteria is displayed sorted by LIBID.

Tip: To retrieve multiple institution records simultaneously, enter complete LIBIDs followed by a space or a comma.

Example: VAUBIJ, MDUHQR, NCUHZY

Additional resources:

- Changing the sort order of search results
- Changing the information displayed for institutions
- Changing the number of records displayed per page
- Find a set of libraries matching search criteria

Finding an institution record by institution name

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**.
2	In the Institution Name input box, enter keywords from the institution name.
3	Press **Enter** or click **Search**.
View	A list of institutions matching your search criteria is displayed sorted by institution name.

Tips:

- 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"

Additional resources:

- Changing the sort order of search results
- Changing the information displayed for institutions
- Changing the number of records displayed per page
- Find a set of libraries matching search criteria

Finding an institution record by library contact name

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**.
2	In the "Contact Name" input box, enter one or more words from the person's name.
3	Press **Enter** or click **Search**.
View	A list of institutions matching your search criteria is displayed sorted by institution name.

Tips:

- To perform a truncation search, enter an asterisk (*) at the beginning or end of a word.

Example: MICH*
*STEIN

- Contact names are stored as first name, middle name, last name in the database. Phrase searching should be limited to search only one part of the name, e.g. search "Mary Beth", not "Jane Smith".

Additional resources:

- Changing the sort order of search results
- Changing the information displayed for institutions
- Changing the number of records displayed per page
- Find a set of libraries matching search criteria

Finding institutions that match multiple search criteria

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**.
2	Select **More Search Options**.
3	(Optional) To query a specific field in the institution record: (a) Select the desired *Search Field* to query (b) Select or enter search term (e.g. Contains, Equal to, Begins with, etc.) **Note:** 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). (c) Click **Add to Search**.
4	(Optional) To search additional fields, select a Boolean operator (and, or, not) and press **Add Another Line**. Repeat Step 3.
5	(Optional) To limit your search results a. Press any of the buttons in the *Filters* box (Delivery Methods, Membership Information, or Services) b. Select the search limits to apply to the search c. Click **Add to Search**.
6	Click **Search**.

Additional resources:

- Changing the sort order of search results
- Changing the information displayed for institutions
- Changing the number of records displayed per page
- Find a set of libraries matching search criteria

Changing the institution information displayed in search results

STEP	Action
1	On the **Search Results** page, click on the **View** link in the search criteria display area.
View	The **Search Results** page is repositioned to display the *View Options* area.
2	Select one of the five categories of information to display from the *View* drop-down list. **Address:** Displays institution, document delivery, and billing address **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
3	Click **Refresh**.

Changing the sort order of search results

STEP	Action
1	On the **Search Results** page, click on the **View** link in the search criteria display area.
View	The **Search Results** page is repositioned to display the *View Options* area.
2	Select the data element for sorting the display from the **Sort** drop-down list.
3	Click **Refresh**.

Changing the number of records displayed per page

STEP	Action
1	On the **Search Results** page, click on the **View** link in the search criteria display area.
View	The **Search Results** page is repositioned to display the *View Options* area.
2	Select the number of institutions to display from the *Results per page* drop-down list. **Note:** The options listed in the number of records list are linked to the View selected. Views that contain large amounts of data allow a fewer number of records to be displayed.
3	Click **Refresh**.

Additional resources

- Changing the institution information displayed in search results
- Changing the sort order of search results

Modifying your search query

STEP	Action
1	On the **Search Results** page, click **Edit This Search** in the search criteria display area.
View	Your current search query is displayed on the **Edit your search** page.
2	You can modify your search query by: Selecting a different Search Field and / or modifying the search term Adding additional criteria by pressing **Add Another Line** Removing criteria by clicking **delete** to remove an entry.
3	To modify your search filters, click **Edit Filters** Select or de-select any criteria to modify your search filters. Click **Add to Search**.
4	Click **Search**.

Adding institutions to your Routing Table from search

STEP	Action
1	On the **Search Results** page, select the institutions to be added to your Routing Table by clicking in the check box next to the institution name
2	Scroll to the bottom of the page to the **Actions for Selected Institutions** area Press **Add to Routing Table**
View	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. The Workspace is a holding area from which libraries can manage their Routing Table.
3	Click **Add and Proceed to Routing Table** to add the listed institutions to your Workspace and proceed to your Routing Table for updating. **OR** Click **Add and Return to Results** 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 <LIBID> from the DOCLINE navigation bar. The Workspace is retained even if you log out of DOCLINE. **OR** Click **Cancel** to abandon the action.

Adding institutions to your M/A/N Map from search

STEP	Action
1	On the Search Results page, select the institutions to be added to your Routing Table by clicking in the check box next to the institution name.
2	Scroll to the bottom of the page to the **Actions for Selected Institutions** area. Press **Add to M/A/N Map**.
View	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. The Workspace is a holding area from which libraries can manage their Routing Table.
3	Click **Add and Proceed to M/A/N Map** to add the listed institutions to your Workspace and proceed to your M/A/N Map for updating. **OR** Click **Add and Return to Results** 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. You can edit your M/A/N Map at any time by selecting Institutions, then Update <LIBID> from the DOCLINE navigation bar. The Workspace is retained even if you log out of DOCLINE. **OR** Click **Cancel** to abandon adding institutions to your Routing Table.

Additional Resources:

- Managing your Routing Table

Printing search results

STEP	Action
1	On the **Search Results** page, select the institutions to be printed 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- clicking **Select All** at the bottom of the page.
2	Scroll to the bottom of the page to the **Actions for Selected Institutions** area. Click **Print**.
View	A new window opens with the selected institutions displayed in the View format of the Search Results page.
3	On the Print dialog window, Click **Print**.
4	Click **Close window** to close the secondary window.

Additional resources:

- Changing the institution information displayed in search results

Downloading search results

STEP	Action
1	On the **Search Results** page, 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- clicking **Select All** at the bottom of the page.
2	Scroll to the bottom of the page to the **Actions for Selected Institutions** area. Click **Download**.
3	On the **Download Search Results** window, select one of the three information views to download: Institution List Address Contact / People
4	On the File Download dialog window, select "Save this file to disk" and Click **OK**.
5	Choose the location where the file will be saved.
6	Name the file or accept the default name.
7	Click **Save**.
8	Open the file in Excel and format as desired.

Updating your Institution

Institution Overview

The DOCLINE institution record contains the institution information for libraries in DOCLINE. Keeping your institution record up-to-date provides accurate information for other DOCLINE libraries. The information includes directory information for the institution and library staff; interlibrary loan services and levels of service provided; delivery methods provided; charges and fees information; DOCLINE and NN/LM membership data; and DOCLINE specific information including request routing instruction defaults.

Each institution record in DOCLINE is recognized by a unique library identifier referred to as LIBID. The LIBID consists of six alphabetic characters. For U.S. and Canadian institutions, it begins with a two-letter US MARC Geographical Code (U.S. State or Canadian Province code), followed by a U for U.S. or a C for Canada and ends with three unique alphabetic characters. The LIBID for other countries consists of the first two letters of the Universal Postal Union (UPU) code, followed by the letter X and then three unique alphabetic characters. **Once a LIBID has been assigned to a library, it cannot be changed**.

Setting your library "Out of Office"

To modify your DOCLINE status to “Temporarily Inactive” so that requests **will not route** to your library, do the following:

STEP	Action
1	Select **Institutions** from the DOCLINE main menu.
2	Select **Update <LIBID>** where <LIBID> is your institution's LIBID View Your library's institution record is displayed.
3	Click **Out of Office** on the institution navigation bar
4	Enter the beginning date when requests should not route to your library. (format must be MM-DD-YYYY) **Note:** Your Regional Medical Library requests at least 2 days advance notice of out of office requests.
5	Enter the date when requests should resume routing to your library. Libraries can only have one set of out of office dates active at any one time.
6	Click **REQUEST APPROVAL**. This notifies your RML to review your Out of Office request. The message "Out of Office request is awaiting approval" will appear in your "Activity and Status" area of the Home page. **Note:** Out of Office do not take effect until your RML approves them. Once approval has occurred, the message on your Home page will be removed.

Additional Resources:

- How Does Routing Work?

Address

Editing your institution address

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**.
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID View your library's institution record is displayed. The Address page is displayed.
3	Click in the **Institution Address** field you wish to edit and make the desired changes.
4	Tab to the next field, or click to any field you wish to edit.
5	Click **Save**.

Note: The institution address is used for directory listings (e.g. MedlinePlus Consumer Health Libraries, NN/LM Member database). The institution address should reflect the address of the library, not the ILL department delivery address.

Editing your addresses for document delivery

STEP	Action
1	Select **Institutions** from the DOCLINE main menu.
2	Select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	The Address page of your library's Institution record is displayed.
3	Click in the **Document Delivery Address** field you wish to edit and make the desired changes.
4	Tab to the next field, or click to any field you wish to edit.
5	Click **Save**.

Note: The document delivery address is the "Ship to:" in DOCLINE that appears on request receipts. The document delivery address should reflect the address where articles and books should be sent via mail, email, web, fax, Ariel or Odyssey.

Editing your billing address

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID View your library's institution record is displayed. The Address page is displayed.
3	Click in the **Billing Address** field you wish to edit and make the desired changes.
4	Tab to the next field, or click to any field you wish to edit.
5	Click **Save**

Note:

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

Editing your internet addresses (URLs)

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**.
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID View your library's institution record is displayed. The Address page is displayed.
3	Click in the **Internet Address** field you wish to edit and make the desired changes. **Note:** URLs must be entered starting with **http://**
4	Tab to the next field, or click to any field you wish to edit.
5	Click **Save**.

People / Contacts

Adding a new contact person

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed.
3	Click **People** on the Institution Navigation bar
4	Click **Add People**
View	The **Add New Contact Person** page is displayed
5	Enter the person's contact information. Fields marked by an asterisk are required.
6	Select which role(s) the person performs by checking the corresponding Contact Type.
7	Click **Save**.

Editing a staff member's contact information

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed.
3	Click **People** on the Institution Navigation bar
4	Click the **Edit** link next to the contact to be modified
View	The contact person's record is displayed
5	Modify the person's contact information. Fields marked by an asterisk are required.
6	Modify which role(s) the person performs by checking the corresponding Contact Type.
7	Click **Save**.

Deleting a contact person from DOCLINE

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed.
3	Click **People** on the Institution Navigation bar
4	Click the **Edit** link next to the contact to be modified
View	The contact person's record is displayed
5	Click **Delete Person**
6	On the "Delete Confirmation" page, click **Yes** **OR** Click **Cancel** to abandon the action.

Membership Overview

The Membership page includes the data elements that describe an institution's NN/LM and DOCLINE membership. The page displays Library Group membership, DOCLINE status, and serial holdings batch updating settings

Most of the Membership page fields can only be edited by your regional DOCLINE coordinator or by NLM. To request a change to any of the "read-only" elements, use the Contact Us link in the DOCLINE navigation area.

Managing exporting of Serial Holdings

To authorize NLM to export your DOCLINE serial holdings data to OCLC, do the following:

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed
3	Click **Membership** on the Institution Navigation bar
4	Click **Serial Holdings** on the Institution Navigation bar **OR** Scroll down to the "Serial Holdings" area
5	Select "Send Holdings to OCLC" in the **Batch Authorization Update** list box
6	Verify your OCLC Symbol. **Note:** A single unique OCLC symbol is required when Send Holdings to OCLC is selected.
7	Click **Save**.

Additional resources:

- Download serial holdings in MARC 21 format

Annual review of serial holdings

DOCLINE participants are required to maintain accurate serial holdings. Libraries can update individual holdings records in DOCLINE, import their holdings from OCLC, or indicate the accuracy of their holdings through an annual review.

To indicate that an institution has reviewed their serial holdings and that they are accurate, do the following:

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed
3	Click **Membership** on the Institution Navigation bar
4	Click **Serial Holdings** on the Institution Navigation bar **OR** Scroll down to the "Serial Holdings" area
5	Enter the date on which your institution completed reviewing their serial holdings
6	Click **Save**

Modifying institution IDs (OCLC, FEIN, MARC code)

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed
3	Click **Membership** on the Institution Navigation bar
4	Click **Organization ID** on the Institution Navigation bar **OR** Scroll down to the "Organization ID" area
5	Click in the "Organization ID" field you wish to edit and make the desired changes.
6	Modify comments explaining IDs.
7	Click **Save**.

Modifying your interlibrary loan service options

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**.
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click **Services & Fees** on the Institution Navigation bar.
4	Modify the ILL services values by clicking the appropriate radio button. **Note:** To join or end EFTS participation, contact EFTS staff at (860) 679-4500.
5	Enter comments about your institution's ILL services.
6	Click **Save**.

Note: If **Fills Rush Request** is selected you must fill within one business day of receipt. Libraries providing this service should check DOCLINE at least twice a day.

Note: If **Fills Urgent Patient Care Request** is selected you must check DOCLINE at least every two hours during the business day, and immediately process any requests.

Modifying your copy service options and fees

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed.
3	Click **Services & Fees** on the Institution Navigation bar
4	Click **Copy Services and Fees** on the Institution Navigation bar **OR** Scroll down to the "Copy Services and Fees" area
View	The library groups your library is a member of will display with their associated charges and comments. Questions or changes about library groups should be directed to your RML.
5	Modify your base fee charge for reciprocal ILL partners and enter any explanatory comments.
6	Modify your base fee charge for other ILL borrowers and enter any explanatory comments.
7	Add any 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**. Enter the surcharge amount and explanatory comments. For example "2 hour service, Mon-Fri 8am - 3pm EST"
8	Indicate whether your library provides copy service to international libraries by selecting the **Yes** or **No** radio button. If you select **Yes**, indicate to which countries you provide service. If you choose **Selected Countries**, click **Add/Delete** Countries. Select the countries served in the Countries popup window and click **Save.**
9	Click **Save** on the **Services & Fees** screen.

Modifying your loan service options and fees

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click **Services & Fees** on the Institution Navigation bar.
4	Click **Loan Services and Fees** on the Institution Navigation bar **OR** Scroll down to the "Loan Services and Fees" area
5	For Audio/Visual, Books, and Journals, indicate whether or not your library will loan these material types by selecting either **Yes** or **No**. • 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.
6	For Audio/Visual, Books, and Journals, enter any comments explaining services and/or fees. **Note:** Libraries are encouraged to include their service standards in the "Service Comments" field under **ILL Services**. For example, "same day service for requests received by 9am ET", or "1 day turn around." This will assist libraries to select institutions to include in their routing tables.
7	Add any surcharges your library adds to its base fee for specific services or conditions. Select the surcharge type from the pull down list and click **Add Surcharge**. Enter the surcharge amount and explanatory comments. For example "2 hour service, Mon-Fri 8am - 3pm EST"
8	Indicate whether your library provides loan service to international libraries by selecting the **Yes** or **No** radio

STEP	Action
	button. If you select **Yes**, indicate to which countries you provide service. If you choose **Selected Countries**, click **Add/Delete Countries**. Select the countries served in the Countries popup window and click **Save.**
9	Click **Save** on the "Services & Fees" screen.

Modifying your library service options

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed.
3	Click **Services & Fees** on the Institution Navigation bar
4	Click **Other Services** on the Institution Navigation bar **OR** Scroll down to the "Other Services" area
5	Indicate whether your library provides the listed services for each of the user populations (Checked = Yes)
6	Indicate whether your library charges for each listed service for each of the user populations by selecting the box under *Charges* (Checked = Yes)
7	Enter comments about your institution’s library services.
8	Click **Save**.

DOCLINE Options

Setting the default values used to route new requests

To modify the default values that are displayed on the Routing Instructions page during Borrow, do the following:

STEP	Action
1	Select **Institutions** from the DOCLINE main menu.
2	select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed
3	Click **DOCLINE Options** on the Institution Navigation bar
4	Enter the default authorization for ILL material in the **Authorized by** field.
5	Enter the default **Maximum Cost** willing to be paid 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.
6	Select "Yes" or "No" for **Require Patron Name** when placing requests.
7	Select the default method of **Copyright Compliance**: **Guidelines** or **Law**. **Note:** DOCLINE libraries are required to comply with the copyright law in their geographic area. In the U.S., the requesting library (borrower) is responsible for complying with copyright law, either the U.S. Copyright Act of 1976 (CCL) or the Copyright Guidelines (CCG)**.**

STEP	Action
8	Enter the default **Comments to Lender***s* to display on DOCLINE Receipts. **Note**: Comments should not contain information that already displays on request receipts (e.g., library group membership, delivery methods).
9	Select the default **Service Type** of your requests: **Copy**, **Color Copy**, or **Original** (Loan).
10	Select the default **Service Level**: **Normal**, **Rush**, or **Urgent Patient Care**
11	Select the default **NLM Delivery Method**
12	Select the default **Network Delivery Method**
13	Select the default **Network Alternate Delivery Method(s)**
14	Select "Yes" or "No" for **Route Only to EFTS Participants**.
15	In the "Serial Routing" area, indicate the default routing instructions for serials including your "Routing Cells", and whether to route to **Resource Libraries**, **NLM**, and to **All other libraries**.
16	Enter LIBIDs in **Do not Route To** field, if desired. (Maximum of 20 LIBIDs).
17	In the M/A/N Map (Monographs, Audiovisuals, and Non-NLM Journal Routing) indicate default lenders.
18	Click **SAVE**.

Additional Resources:

- Completing the Routing Instructions Page
- Do Not Route To
- Routing Table Overview
- M/A/N Map Overview

Modifying your lending preferences

STEP	Action
1	Select **Institutions** from the DOCLINE main menu.
2	Select **Update <LIBID>** where <LIBID> is your institution's LIBID Your library's institution record is displayed.
3	Click **DOCLINE Options** on the institution navigation bar.
4	Click **Lending Preferences** on the institution navigation bar **OR** Scroll down to the "Lending Preferences" area.
5	Indicate by which delivery methods your library can send ILL copy request material. **NOTE:** The delivery method values are checked by DOCLINE when routing copy requests. The routing algorithm does not check delivery methods when routing "original" (or "loan") requests since mail delivery is assumed.
6	For each request type, indicate whether your library wants to receive an email message for each request routed to your library.
7	Enter email address to which new request email notifications should be sent.
8	Select the Lend update method that you want to use by choosing **Batch** or **Single**.
9	Click **SAVE**.

Additional Resources:

- How Does Routing Work?
- Delivery Methods
- Editing your addresses for document delivery

Delivery Methods

The following delivery methods are available in DOCLINE.

Ariel: Ariel is a document transmission system that delivers files to your institution via the Internet. These files can then be printed, emailed or posted to the Web for your patrons. In order to receive documents by Ariel, your institution needs to purchase and install Ariel software.

Email (PDF): Document sent as an email attachment. PDF (Portable Document Format) is a file format that preserves the formatting of the original document. PDF documents can be viewed with Adobe Acrobat Reader, available free from Adobe.

Email (TIFF): Document sent as an email attachment. The multi-page TIFF (Tagged Image Format File) requires a TIFF viewer. See FAQ on viewing articles.
Note: File size for TIFF images tend to be large.

Fax: Document sent via fax to number listed in the institution record.

Mail: Document mailed to the institution postal address indicated on request.

Odyssey: Document sent via Odyssey transmission protocol. In order to receive documents by Odyssey, your institution needs to download and install Odyssey software.

Pick up: Document held for patron pick up at location specified by library. Patrons should check with ordering library for holding period and pick up location.

Web (PDF): Patron will receive an email message containing a hyperlink to the requested document. PDF (Portable Document Format) is a file format that preserves the formatting of the original document. PDF documents can be viewed with Adobe Acrobat Reader, available free from Adobe.
Note: Recommended for users who have a slow connection or size limitations on their email system.

Web (TIFF): Patron will receive an email message containing a hyperlink to the requested document. Documents can be viewed and printed from the

referenced hyperlink. The multi-page TIFF (Tagged Image Format File) requires a TIFF viewer. See FAQ on viewing articles.
Note: Recommended for users who have a slow connection or size limitations on their email system.

Additional Resources:

- Routing of serial requests
- Routing of monographs and non-NLM serial requests
- Modifying your delivery methods

Routing Table Overview

The Routing Table is the grouped list of institutions to which your serial requests will route, if the library meets the other routing instructions for a request (holdings, delivery method, service level, EFTS, and color copy). Individual libraries and Library Groups to which the library belongs can be added to a Routing Table. The institutions and Library Groups listed are a library's primary lending partners.

The Routing Table is comprised of nine (9) cells, each of which can contain up to twenty (20) libraries or Library Groups (a Library Group takes up one position in a cell). 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. Individual libraries and libraries in a Library Group within the same cell are treated equally by the routing algorithm in terms of the ordering of routing. 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.

The Workspace is a holding area for institutions being added or moved as libraries work on modifying their Routing Table over a period of time. DOCLINE populates the Workspace with any Library Group to which the library belongs. The Workspace is automatically updated with any library group membership changes.

Strategies for setting up Routing Tables vary from region to region. Your regional DOCLINE coordinator can provide valuable guidance for managing your Routing Table. For more information on how to best organize your Routing Tables, contact your DOCLINE Coordinator at 1-800-338-7657 in the US or at 1-800-668-1222 in Canada.

Typically, libraries structure their Routing Table so that preferred low cost lenders are in lower numbered cells, followed by preferred lenders with higher costs. Preferred lenders could be based upon good service and/or low cost, or part of a library group or reciprocal agreement. Some libraries also include regional preferences in their Routing Table organization - libraries in their state or region in lower numbered cells, followed by other libraries in higher numbered cells. Libraries can also establish east and west coast cells if they regularly order rush requests and want DOCLINE to first

attempt to route to a particular geographic region. These geographic cells could be selected and deselected as needed.

Additional Resources

- How does routing work?
- Contact Your RML

Adding institutions to your Routing Table

Libraries can add individual institutions or Library Groups that they are members of to their Routing Table. To add libraries or a Library Group, do the following:

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**.
2	On the DOCLINE sub navigation bar, select **Update**. **<LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed
3	Click **DOCLINE Options** on the Institution Navigation bar
4	Click the **Edit Routing Table** link on the Institution Navigation bar **OR** Press **Edit Routing Table** in the "Serial Routing" area of the **DOCLINE Options** page
View	Your "Proposed" Routing Table and its associated Workspace displays. The Proposed tab 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 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. The Workspace also contains any Library Groups to which your library belongs that are not currently in your Routing Table.
5	(Optional) In the "Add to Workspace" area, enter a valid LIBID and press **Add**. The institution is added to the Workspace. **Note:** You cannot add a Library Group to the Workspace. DOCLINE automatically adds and deletes Library Groups from your Workspace as your RML updates your membership in a Library Group.
6	In the "Proposed Routing Table", click on the numbered tab corresponding to the cell to which you want to add an

STEP	Action
	institution or Library Group. In the Workspace, select the institution(s) or Library Group 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 institution(s) or Library Group 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.** **Note:** Due to the random selection of libraries during routing, NLM recommends placing a Library Group in a cell by itself, or only with individual libraries that should be treated equally by the routing algorithm.
7	To add more institutions or another Library Group, repeat Steps 5-6.
8	Click **Save**
9	Click **Request Approval** once all changes have been made. This notifies your RML 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:** Routing Table changes do not take effect until your RML approves them. Once approval has occurred, the message on your Home page will be removed.

Additional Resources

- Adding institutions to your Routing Table from search
- Routing of serial requests
- Contact Your RML

Removing institutions from your Routing Table

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed
3	Click **DOCLINE Options** on the Institution Navigation bar
4	Click the **Edit Routing Table** link on the Institution Navigation bar **OR** Click **Edit Routing Table** in the "Serial Routing" area of the **DOCLINE Options** page
View	Your "Proposed Routing Table" and its associated Workspace displays. The Proposed tab 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, deletes, moves). 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 current Routing Table. The Workspace also contains any Library Groups to which your library belongs that are not currently in your Routing Table.
5	In the "Proposed Routing Table", click on the cell number which contains the institution(s) or Library Group to be removed.
6	Select the institution(s) or Library Group to be deleted by clicking the checkbox next to the institution or Library Group name.
7	Press the right pointing arrow to move the institution or Library Group to the Workspace for later use **OR** Click **Delete.** **Note:** Library Groups cannot be deleted by a library. DOCLINE automatically deletes a Library Group from your Routing Table or Workspace as your RML

STEP	Action
	updates your Library Group membership.
8	To remove additional libraries, repeat Step 5-7
9	Click **Save**
10	Click **Request Approval** once all changes have been made. This notifies your RML 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:** Routing Table changes do not take effect until your RML approves them. Once approval has occurred, the message on your Home page will be removed.

Additional Resources

- Routing of serial requests
- Contact Your RML

Moving institutions in your Routing Table

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed
3	Click **DOCLINE Options** on the Institution Navigation bar
4	Click the **Edit Routing Table** link on the Institution Navigation bar **OR** Click **Edit Routing Table** in the "Serial Routing": area of the **DOCLINE Options** page
View	Your "Proposed Routing Table" and its associated Workspace displays. The Proposed tab 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 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. The Workspace also contains any Library Groups to which your library belongs that are not currently in your Routing Table.
5	In the "Proposed Routing Table", click on the cell number which contains the institution(s) or Library Group to be moved.
6	Select the institution(s) or Library Group to be moved by clicking the checkbox next to the institution name.
7	In the "Proposed Routing Table", select "Move to Cell #" from the list box and press **Go**
8	To move additional libraries or another Library Group , repeat Step 5-7
9	Click **Save**
10	Click **Request Approval** once all changes have been made. This notifies your RML to review your Routing Table changes. The message "Routing table is awaiting

STEP	Action
	approval" will appear in your "Activity and Status" area of the Home page. **Note:** Routing Table changes do not take effect until your RML approves them. Once approval has occurred, the message on your Home page will be removed.

Tip: Institutions can be moved into the Workspace for later use. Just as with the Routing Table, remember to Save when adding, deleting, or moving libraries into or out of the Workspace before leaving the Update Routing Table page.

Additional Resources

- Adding institutions to your Routing Table from search
- Routing of serial requests
- Contact Your RML

Viewing your Routing Table changes

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed
3	Click **DOCLINE Options** on the Institution Navigation bar
4	Click the **Edit Routing Table** link on the Institution Navigation bar **OR** Click **Edit Routing Table** in the "*Serial Routing*" area of the **DOCLINE Options** page
View	Your "Proposed Routing Table" and its associated Workspace displays. The Proposed tab 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 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. The Workspace also contains any Library Groups to which your library belongs that are not currently in your Routing Table.
5	Click on the **Compare** tab
View	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.
6	Click **Request Approval** once all changes have been made. This notifies your RML 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:** Routing Table changes do not take effect until your RML approves them. Once approval has occurred,

STEP	Action
	the message on your Home page will be removed.

Additional Resources

- Routing of serial requests
- Printing your Routing Table
- Contact Your RML

Viewing your current Routing Table

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed
3	Click **DOCLINE Options** on the Institution Navigation bar
4	Click the **Edit Routing Table** link on the Institution Navigation bar **OR** Click **Edit Routing Table** in the "Serial Routing" area of the **DOCLINE Options** page
View	Your "Proposed Routing Table" displays. The Proposed tab allows you to edit your Routing Table and consists of your Routing Table currently in use by DOCLINE for routing (Routing Table Overview) plus any changes you've made (additions, deletes, moves). The Workspace contains any libraries which you've added from Institution Search, added via Add to Workspace on this page, or previously moved from the current Routing Table. The Workspace also contains any Library Groups to which your library belongs that are not currently in your Routing Table.
5	Click on the **Current** tab
View	The **Current** tab displays the Routing Table currently in use by DOCLINE for routing.

Tip: To find a specific library in your displayed Routing Table, use your browser's Find on this page functionality to search for the LIBID or library name.

Additional Resources

- Routing of serial requests
- Printing your Routing Table

Printing your Routing Table

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed
3	Click **DOCLINE Options** on the Institution Navigation bar
4	Click the **Edit Routing Table** link on the Institution Navigation bar OR Click **Edit Routing Table** in the "Serial Routing" area of the **DOCLINE Options** page
5	Click on the tab you wish to print • **Proposed** tab - shows your Routing Table currently in use by DOCLINE for routing plus any changes you have made (additions, deletions, moves). This tab displays by default. • **Current** tab - shows the approved Routing Table currently in use by DOCLINE • **Compare** tab - shows a list of the differences between your current Routing Table and your "Proposed" Routing Table
6	Click on the **Print All Cells** link.
View	The information about your Routing Table is displayed in a new window
7	Print via your browser's printing function (**File**, **Print**).
8	Close the Print window.

Managing your monographic, A/V, non-NLM serials Map (M/A/N Map)

M/A/N Map Overview

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 (9) rows. The order of routing is sequential from Row 1 through Row 9.

The Workspace is a holding area for institutions being added or moved as libraries work on modifying their M/A/N Map over a period of time.

Strategies for setting up an M/A/N Map vary from region to region. Your DOCLINE coordinator can provide valuable guidance for managing your M/A/N Map.

Additional Resources:

- How does routing work?
- Contact Your RML

Adding institutions to your M/A/N Map

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed
3	Click **DOCLINE Options** on the Institution Navigation bar
4	Click the Edit M/A/N Map link on the Institution Navigation bar **OR** Click **Edit M/A/N Map** in the "Monographs, Audiovisuals, and Non-NLM Journal Routing" area of the **DOCLINE Options** page
View	The M/A/N Map Workspace displays. The Workspace contains any libraries which you've added from Institution Search, added via "Add to Workspace" on this page, or previously moved from the M/A/N Map.
5	(Optional) In the "Add to Workspace" area, enter a valid LIBID and press **Add**. The institution is added to the Workspace.
6	In the Workspace, select the library or libraries to add to the M/A/N Map by checking the box next to the institution name Press the arrow pointing from the Workspace to the M/A/N Map The institutions are added to the bottom of the ordered list in order by LIBID **OR** In the Workspace, select one (1) library to add by checking the box next to the institution name In the Workspace, select "Move to Row #" from the list box and click **Go** The institution is inserted at that row position. Institutions are automatically reordered, moving each institution down one row.

STEP	Action
7	To add more institutions, repeat Step 6.
8	Click **Save**.

Additional Resources:

- Adding institutions to your M/A/N Map from search

Removing institutions from your M/A/N Map

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed
3	Click **DOCLINE Options** on the Institution Navigation bar
4	Click the **Edit M/A/N Map** link on the Institution Navigation bar **OR** Click **Edit M/A/N Map** in the "Monographs, Audiovisuals, and Non-NLM Journal Routing" area of the **DOCLINE Options** page.
View	The M/A/N Map and its associated Workspace displays. The Workspace contains any libraries which you've added from Institution Search, added via Add to Workspace on this page, or previously moved from the M/A/N Map
5	In the 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
6	Press the right pointing arrow to move the institution to the Workspace for later use **OR** Click **Delete** Institutions are automatically reordered, moving each library up.
7	To move additional institutions, repeat Steps 5-6.
8	Click **Save**.

Moving institutions in your M/A/N Map

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed
3	Click **DOCLINE Options** on the Institution Navigation bar
4	Click the **Edit M/A/N Map** link on the Institution Navigation bar OR Click **Edit M/A/N Map** in the "Monographs, Audiovisuals, and Non-NLM Journal Routing" area of the **DOCLINE Options** page.
View	The M/A/N Map and its associated Workspace displays. The Workspace contains any libraries which you've added from Institution Search, added via Add to Workspace on this page, or previously moved from the M/A/N Map
5	In the M/A/N Map, select a library to move within the M/A/N Map by checking the box next to the institution name
6	Select "Move to Row #" from the list box and press **Go** Institutions are automatically reordered, moving the other institutions in the list up or down.
7	To move additional institutions, repeat Steps 5-6.
8	Click **Save**.

Viewing which institutions have your library in their Routing Table

STEP	Action
1	On the DOCLINE navigation bar, select **Requests**
2	On the DOCLINE sub navigation bar, select **Reports**
View	Your library's list of available reports is displayed.
3	Click on the 1-7 Report link: *Library Routing Table and M/A/N Map cells containing my LIBID*

Modifying your default delivery methods

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed
3	Click **DOCLINE Options** on the Institution Navigation bar
4	Click **Delivery Methods** on the Institution Navigation bar **OR** Scroll down to the "Delivery Methods" area
5	In the "Receive by" area, indicate by which delivery methods your library can receive ILL material
6	Enter a delivery address for each delivery method
7	In the "Send by" area, indicate by which delivery methods your library can send ILL material
8	Click **Save**.

Loansome Doc

Customizing the registration process

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed.
3	Click **Loansome Doc** on the Institution Navigation bar
4	Click **Registration** on the Institution Navigation bar OR Scroll down to the *Registration* area
5	Indicate whether you want to prompt users to enter an authorization code during registration by checking **Yes** or **No**. A message will also display notifying patron to contact library prior to registration.
6	Enter authorization code that must be entered by patrons during Loansome Doc registration. Patron must enter matching code in order to successfully register with your library. **Note:** Authorization code may be changed as often as necessary to ensure code is not passed along by patron to other users.
7	Indicate whether you want to prompt for a library defined data element (identifier) during registration, e.g., employee ID number by checking **Yes** or **No**.
8	Enter the label for the identifier field. The label will display to patrons during registration. Limit 25 characters. **IMPORTANT:** Libraries cannot ask users for private or secure information, e.g., social security number, credit card number
9	Enter the instructions for the identifier field which display to the user during registration. Limit 160 characters.
10	Click **Save**.

Loansome Doc Delivery Methods

The following delivery methods are available in Loansome Doc.

Email (PDF): Document sent as an email attachment. PDF (Portable Document Format) is a file format that preserves the formatting of the original document. PDF documents can be viewed with Adobe Acrobat Reader, available free from Adobe.

Email (TIFF): Document sent as an email attachment. The multi-page TIFF (Tagged Image Format File) requires a TIFF viewer. See FAQ on viewing articles.
Note: File size for TIFF images tend to be large.

Fax: Document sent via fax to number listed in the institution record.

Mail: Document mailed to the institution postal address indicated on request.

Pick up: Document held for patron pick up at location specified by library. Patrons should check with ordering library for holding period and pick up location.

Web (PDF): Patron will receive an email message containing a hyperlink to the requested document. PDF (Portable Document Format) is a file format that preserves the formatting of the original document. PDF documents can be viewed with Adobe Acrobat Reader, available free from Adobe.
Note: Recommended for users who have a slow connection or size limitations on their email system.

Web (TIFF): Patron will receive an email message containing a hyperlink to the requested document. Documents can be viewed and printed from the referenced hyperlink. The multi-page TIFF (Tagged Image Format File) requires a TIFF viewer. See FAQ on viewing articles.
Note: Recommended for users who have a slow connection or size limitations on their email system.

Additional Resources:

- Modifying your Loansome Doc delivery methods

Modifying your Loansome Doc delivery methods

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID
View	Your library's institution record is displayed.
3	Click **Loansome Doc** on the Institution Navigation bar
4	Click **Delivery Methods** on the Institution Navigation bar **OR** Scroll down to the "Delivery Methods" area
5	In the "Send by" area, indicate by which delivery methods your library can send document delivery material
6	Click **Save**.

Additional resources:

- Loansome Doc Delivery Methods
- Modifying your Loansome Doc registration options
- Modifying your Loansome Doc service options

Modifying your Loansome Doc service options

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**.
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click **Loansome Doc** on the Institution Navigation bar.
4	Click **Loansome Doc Services** on the Institution Navigation bar **OR** Scroll down to the "Loansome Doc Services" area.
5	Indicate whether your library is a Loansome Doc provider by checking **Yes** or **No**.
6	Indicate to which user populations your library provides Loansome Doc service by checking the box under *Provides* (Checked = **Yes**).
7	Indicate whether your library charges for Loansome Doc service for each of the user populations by checking the box under *Charges* (Checked = **Yes**).
8	Enter comments about your institution's Loansome Doc services.
9	Indicate whether your library provides loan service to international libraries by selecting the **Yes** or **No** radio button. If you select **Yes**, indicate whether your library charges for Loansome Doc services. Also, indicate to which countries you provide service. If you choose Selected Countries, click **Add/Delete Countries**. Select the countries served in the Countries popup window and click **Save**.
10	Click **Save** on the "Loansome Doc Services" screen.

Additional Resources:

- Modifying your Loansome Doc delivery methods
- Modifying your Loansome Doc registration options

Modifying your Loansome Doc registration options

STEP	Action
1	On the DOCLINE navigation bar, select **Institutions**.
2	On the DOCLINE sub navigation bar, select **Update <LIBID>** where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click **Loansome Doc** on the Institution Navigation bar.
4	Click **Loansome Doc Registration** on the Institution Navigation bar **OR** Scroll down to the "Loansome Doc Registration" area.
5	Indicate whether your library Requires an Authorization Code for patron registration by checking **Yes** or **No**. If **Yes** is selected enter the Authorization Code in the space provided.
6	Indicate whether your library requires a library-defined identification from the user during registration by checking **Yes** or **No**. If **Yes** is selected enter the Label for the identification field in the space provided and enter the Instructions to User for the identification field in the text box.
7	Click **Save** on the **Loansome Doc Options** screen.

Additional Resources:

- Modifying your Loansome Doc service options
- Modifying your Loansome Doc delivery methods

Managing Loansome Doc Patrons

Finding a Loansome Doc patron

STEP	Action
1	On the DOCLINE navigation bar, select **Loansome Doc Patrons**.
2	To query a specific field in the patron record: a. Select the desired "Search in" field to query b. Select search term (e.g. Contains, Equal to, Begins with, etc.) **Note:** Depending upon the "Search in" field selected, you will select from a drop-down list (e.g. Country Group or State/Province) or type in a value (e.g. Name or email).
3	(Optional) To search additional fields, select a Boolean operator (and, or, not) and repeat Step 2.
4	(Optional) To limit your search results a. Select a value from the *Only if* box (Affiliated, Unaffiliated, or Authorized).
5	Click **Search**.

Additional Resources:

- Changing the patron information displayed
- Changing the sort order of search results
- Changing the number of records displayed

Loansome Doc patron categories

Affiliated Patron: A patron who has an affiliation with the library or organization that is providing Loansome Doc service, for example, hospital staff, physicians with hospital privileges.

Unaffiliated Health Professional: A patron who is a health professional, but does not have an affiliation with the library or organization that is providing Loansome Doc service.

Public: A patron who is a member of the general public. The patron is not affiliated with the institution and is not a health professional.

Patrons self-identify their patron category during registration, but the library has the ability to modify the patron category. The patron category display on the Loansome Doc Receipt as: "Affiliated", "Unaffiliated", or "Public".

Authorized Patron: Indicates that the patron is approved for Loansome Doc services at the specific institution. Each library has the ability to designate whether or not individual Loansome Doc users are authorized to route their requests to their institution. **The default value at registration is authorized.** If a library no longer wants to serve a patron, they should contact that person by telephone, email or in writing. Select the authorized box on the Loansome Doc Patron screen to remove the check mark. Unauthorized users will not be able to make Loansome Doc requests to your library.

Changing the patron information displayed

STEP	Action
1	On the DOCLINE navigation bar, select **Loansome Doc Patrons**.
2	Enter search criteria.
3	Select one the three categories of information to display from the "Display results as" drop-down list. **Contact Information:** Displays patron name, phone number, fax number, and email address **Patron Address:** Displays patron's address **Patron List:** Displays a list of the patrons with name, email address, patron category and indication whether they are authorized.
4	Click **Search**.

Additional resources:

- Finding a Loansome Doc patron
- Changing the sort order of search results
- Changing the number of records displayed

Changing the number of records displayed

STEP	Action
1	On the DOCLINE navigation bar, select **Loansome Doc Patrons**
2	Enter search criteria
3	Select one of the numbers from the "Records per page" drop-down list to control how many patron records display on the search results page.
4	Click **Search**.

Updating a patron's account record

STEP	Action
1	On the DOCLINE navigation bar, select **Loansome Doc Patrons**.
2	Enter search criteria.
3	Click **Search**.
View	The patron search results are displayed.
4	Select a record by clicking on the patron name.
View	The patron record is displayed.
5	Edit information as desired. Asterisked (*) fields are required.
6	Click **Update**.

Additional Resources:

- Finding a Loansome Doc Patron
- Changing the sort order of search results
- Changing the number of records displayed

Changing the sort order of search results

STEP	Action
1	On the DOCLINE navigation bar, select **Loansome Doc Patrons**.
2	Enter search criteria.
3	Select one of the patron fields from the "Sort order" drop-down list.
4	Click **Search**.

Additional Resources:

- Finding a Loansome Doc patron
- Changing the patron information displayed
- Changing the number of records displayed

Changing a patron's password

For privacy reasons, Loansome Doc patron passwords are never displayed in the interface and are not accessible to libraries or to NLM. Patrons can reset their password themselves, but libraries can also reset a patron's password. To change a patron's password, do the following:

STEP	Action
1	On the DOCLINE navigation bar, select **Loansome Doc Patrons**
2	Enter search criteria
3	Click **Search**
View	The patron search results are displayed
4	Select a record by clicking on the patron name
View	The patron record is displayed
5	Verify the patron's email address
6	Click **Reset Password** The new password is emailed to the email address in the record.

Additional Resources:

- Finding a Loansome Doc patron
- Changing the sort order of search results
- Changing the number of records displayed

Blocking a patron's Loansome Doc requests

To prevent a patron from sending requests to your library, do the following:

STEP	Action
1	On the DOCLINE navigation bar, select **Loansome Doc Patrons**
2	Enter search criteria
3	Click **Search**
View	The patron search results are displayed
4	Select a record by clicking on the patron name
View	The patron record is displayed
5	Click the "Authorized Patron" box to clear the checkmark
6	To remove a patron from your list of patrons, check the box: **Remove patron from my library's list of patrons**. **Note:** You will no longer have access to this patron's user account
7	Click **Update**

Additional Resources:

- Finding a Loansome Doc patron
- Changing the sort order of search results
- Changing the number of records displayed