

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:

<http://www.nlm.nih.gov/docline>

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Welcome to DOCLINE Help



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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

Select this link to view Loansome Doc requests received by your library, but not yet updated as filled, not filled, or transferred.

13. ## **SERHOLD Reports Ready**

Select this link to view completed Serial Holdings (SERHOLD) 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 http://listserv@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.

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

display HTML or Rich Text messages.	
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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 <i>DOCLINE-L your name</i>	» subscribes you to the list specified
SIGNOFF <i>DOCLINE-L</i>	» removes you from the specified list
SET <i>DOCLINE-L</i> NOMAIL	» stops incoming mail from specified list
SET <i>DOCLINE-L</i> MAIL	» restarts mail from the list
SET <i>DOCLINE-L</i> DIGEST	» subscriber receives a digest of messages
SET <i>DOCLINE-L</i> NODIGEST	» messages are received as they are posted
SET <i>DOCLINE-L</i> ACK	» sends confirmation when you post to the list
SET <i>DOCLINE-L</i> NOACK	» cancel confirmation messages
HELP	» retrieves a list of LISTSERV® commands
QUERY <i>DOCLINE-L</i>	» retrieves your current subscription settings

Getting Help

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- For questions about the DOCLINE-L list or for help subscribing, unsubscribing, or submitting to a list, contact the list owner 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://lists.med.nyu.edu/mailman/listinfo/marl>

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/assoc/canmede.html> (English)

Region 20: <http://www.chla-absc.ca/indexf.html> (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 98 / NT / 2000 / XP. (At this time, NLM does not support the Macintosh platform.)
- Firefox 2.x; Internet Explorer 6.x or Internet Explorer 7.x.
- FTP (File Transfer Protocol) enabled with the ability to view hidden subdirectories turned on (only if access to Serial Holdings reports is needed).

- Firewall Users: "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 Firefox 2.x, Internet Explorer 6.x and Internet Explorer 7.x for use with DOCLINE. However, each browser version (major and minor releases) may have specific issues which NLM cannot always address.

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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 2.x
- Internet Explorer 6.x
- Internet Explorer 7.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.

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:

Tutorial - The Regional Medical Libraries have prepared a step-by-step tutorial to help new and infrequent users learn DOCLINE.

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 3, then 1
 - From outside the U.S.: (301) 594-5983; press 3, then 1
- **Customer Service hours are:**
Monday - Friday: 8:30 A.M. - 9:00 P.M., ET
Saturday: 10:00 A.M. - 5:00 P.M., ET

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 via an online tutorial. Training by phone or in-person can also 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 Karen Bülow: 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 tutorial 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
- 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
- Request the loan of an item
- Request the loan of material not in NLM's OPAC
- Sort the Process PubMed Orders Screen

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
Form	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

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Copyright compliance	<p>Guidelines - borrower's ILL request complies with copyright law under Sections 107 - 108 of the US copyright act, or your country's equivalent of "Fair Use" if applicable</p> <p>Law - borrower's ILL request complies with copyright law by paying royalties to copyright holder directly or thru an agent such as Copyright Clearance Center (CCC); or requested item is not covered by copyright</p> <p>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.</p>
Service Level	<p>Normal - request will be processed as part of lender's normal ILL processes.</p> <p>Rush - lender should process request the same day</p> <p>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.</p>
Authorized By	Lists staff information indicating who authorized the placing of the request.
Referral reason	Indicates the reason the borrower needs to request the item. Provides statistical data about the ILL needs of participating libraries. Optional.
Maximum cost	Indicates the maximum amount the borrower is willing to pay for the ILL request. Cost is not used in determining routing.
Route to EFTS Participants Only	If checked, request will only route to institutions that are members of the Electronic Fund Transfer System. Optional.
Patron Name	Enter 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	Enter 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.

Network Delivery	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.
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.
Prefix LIBID	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.
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.
Refer to Resource Libraries	Determines whether the routing algorithm will attempt to route the request to Resource Libraries meeting the routing instructions. Optional.
Route to NLM	Determines whether the routing algorithm will route the request to NLM (MDUNLM, MDULMF, and MDUHMD) during routing. Optional.
Refer on after NLM	Determines whether the routing algorithm will attempt to route the request to additional Resource Libraries, Primary Access Libraries, and Other libraries. Optional.

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

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 .

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- 3 Select **PubMed**.
- 4 Perform PubMed Search(es) or Use Citation matcher
- 5 Click check-box to the left of each citation you want to Order.
- 6 Select **Order** 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** tab in the top menu bar to view saved citations.
- 8 Click check-box to the left of each citation you want to order. Select **Order** from the [Send To] drop-down menu.

OR

Select **Order** 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. From the [Send to] drop-down menu, select **Clip Remove** .

- 9 Review "Process PubMed Orders" screen in DOCLINE. Sort the list if desired.
- 10 Click check-box to the left of each citation you want to order. Click **Next**

OR

Click **Next** 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	Select UniqueKey
4	Enter up to 11 PMIDs in the box labeled PMID(s). Separate each PMID with a comma or a space.
	Click Search .
5	Select check-boxes on "Process PubMed Orders" page to order specific selections and click Next
	OR
	Click Next to order all documents. Sort the list first if desired.
6	Review and modify the information on "Routing Instructions" screen as necessary.
	Click Next .
7	Edit delivery address on "Delivery Address" screen as needed.
8	Click Finish to complete your order request.
	Note: Click Prev 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 could not be placed, you will be informed of the problem with the request. Click Return to make necessary changes on the Routing Instructions page.
10	Click the linked request number to view an individual request
	OR

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Click **Full Display** to view all of the items requested.

- 11 To print the request once you have displayed the items, use your browser's print feature.
- 12 Click **Return** to continue ordering from the remaining list of citations.

Additional Resources:

- Completing the routing instructions page
- Routing of serial requests

Requesting copies of non-PubMed material

Ordering materials with a Unique ID

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	Select UniqueKey .
4	Click in drop-down box for "Select key" from LocatorPlus Choose from: 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

	<p>appended at end of search term. For example, "cell/" will retrieve titles beginning with "cell", "cellular", "cellulose", etc.)</p> <p>Note: NLM Unique ID includes the old TCN or Serial Holdings SEQ Number.</p>
5	Enter one (1) LocatorPlus UI. Click Search .
6	Complete citation information as completely as possible in "Citation Input" form. Click Next .
7	Review and modify the information on "Routing Instructions" screen as necessary. Click Next .
8	Edit delivery address on "Delivery Address" screen as needed.
9	Click Finish to complete your order request. Note: Click Prev to return to the previous Borrow input screen.
10	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 the problem with the request. Click Return to make necessary changes on the Routing Instructions page.
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.

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 blue frame) at the bottom of the screen.
7	Complete "Routing Instructions" and "Delivery Address" Information in DOCLINE.
8	Review and modify the information on "Routing Instructions" screen as necessary. Click Next .
9	Edit delivery address on "Delivery Address" screen as needed.
10	Click Finish to complete your order request.
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 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, 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 .
7	<p>Review the "Routing Instructions" screen, modifying the M/A/N Map 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.</p> <p>To add or replace a library entry in the M/A/N Map, enter a valid LIBID in the desired cell. Select the number in front of the cell 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.</p> <p>Note: If the item is not in LocatorPlus, NLM does not own the item. Deselect Route to NLM.</p>
8	Select Next .
9	Edit delivery address on "Delivery Address" screen as needed.
10	Select Next .
11	<p>Select Finish to complete your order request.</p> <p>Note: Select Prev to return to the previous Borrow input screen.</p>
12	Select 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.

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

Transferring Loansome Doc requests

Libraries may transfer pending Loansome Doc requests into DOCLINE if they are unable to fill the request. 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 Go to retrieve all pending requests or enter a specific request number.
View	<p>Pending Loansome Doc request(s) are displayed. If an item is available free online in PubMed Central or through publisher site, a "FREE" icon and link appears. If your library reports LinkOut holdings for the title, a message will display. If your library reports holdings in DOCLINE, a message will display.</p> <p>The patron's name, patron type, and authorization are displayed.</p>
5	<p>Select Patron or Library from the Ship To select box to indicate delivery location.</p> <p>Note: If selecting Ship to Patron, the patron's delivery address and delivery method are displayed in "Routing Instructions". If selecting Ship to Library, the library's default delivery method and alternate delivery methods are displayed in "Routing Instructions".</p>
6	Select the displayed request number(s) under the Transfer Request column to initiate the transfer into

	DOCLINE.
7	Review and complete the "Routing Instructions". For Loansome Doc transfers, Referral Reason is required. Note: The max cost value is taken from the amount specified in patron's request.
8	Review the delivery address. Update as necessary.
9	Select 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 could not 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 page.
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.
13	Select Return to transfer another Loansome Doc citation from the remaining list.

Additional Resources:

- Completing the routing instructions page
- Routing of serial requests

Requesting a loan**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	Select Uniquekey
4	Click in drop-down box for "Select key" from LocatorPlus Choose from:

	<p>NLM Unique ID (OPAC record number)</p> <p>ISSN: International Standard Serial Number</p> <p>ISBN: International Standard Book Number</p> <p>OCLC: OCLC record number. Must be at least 8 digits; for example, "01641120".</p> <p>Full Title/Title Abbrev: Complete monograph or serial title / Designated NLM journal title abbreviation</p> <p>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.).</p> <p>Note: NLM Unique ID includes the old TCN or Serial Holdings SEQ Number.</p>
5	Enter one (1) LocatorPlus UI. Click Search .
6	Complete citation information as completely as possible in "Citation Input" form. Click Next .
7	Review and modify the information on "Routing Instructions" screen as necessary, including the Form (Copy or Original) and delivery methods. Click Next .
8	Edit delivery address on "Delivery Address" screen as needed
9	Click Finish completing your order request. Note: Click Prev to return to the previous Borrow input screen.
10	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 the problem with the request. Click Return to make necessary changes on the "Routing Instructions" page.

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.

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 that are 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 .
7	Review the "Routing Instructions" screen, modifying the M/A/N Map 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. Select the number in front of the cell 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 Route to NLM .
8	Select Next .
9	Edit delivery address on "Delivery Address" screen as needed.
10	Select Next .
11	Select Finish completing your order request.

	Select Prev to return to the previous Borrow input screen.
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.

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 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.

Routing 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. Prefix LIBID (if entered)

Holdings are checked for the Prefixed library, but will route regardless.

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 provides the selected level of service (if above Normal) AND
- d. the institution provides color copy service (if selected) AND
- e. the institution is an EFTS participant (if selected).

Note: Prefixing to an individual library 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 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 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);

Then if less than 20 libraries selected for routing,

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

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Then repeat for cell 2, cell 3, etc.

3. Resource Libraries (if Refer to 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. selected preferred 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 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) AND

g. the request did not previously route to institution;

Then if less than 20 libraries selected for routing,

h. the institution supports one of the alternate delivery methods selected AND

i. conditions b-g 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 selected delivery method OR one of the alternate delivery method(s) AND

c. NLM provides the level of service selected.

5. Refer on after NLM (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 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 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) AND
- g. the request did not previously route to institution;

Then if less than 20 libraries selected for routing,

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

Then if less than 20 Resource Libraries selected for routing,

- j. Repeat steps a-i for Primary Access Libraries;

Then if less than 20 libraries selected for routing,

- k. Repeat steps a-i 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,

- l. Repeat steps a-i for "Other" libraries (library level = Other).

Note: Delivery methods are not checked in the routing of an "Original" (or "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 of monographs and non-NLM serial requests

Because no holdings records are available for monograph 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

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- a. LIBID is valid AND
 - b. The selected delivery method OR one of the 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. Route to NLM (if "Route to NLM" is set to "Yes")
- NLM holdings are not checked.
Request will route to NLM IF
- a. Route to NLM checked.
 - b. NLM provides the selected preferred delivery method OR one of the alternate delivery method(s).
 - c. NLM provides the level of service selected.

Additional resources:

- DOCLINE system actions (Time Triggered Actions)
- Setting the default values used to route new requests
- Routing of serial requests

Receiving Requests

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 request has routed to your library based upon 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 get an accurate status of requests. 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	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 .

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, fill out the DOCLINE Hold Request form. You will receive a confirmation after the form has been submitted.

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 a 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.

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- 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 1st
- Memorial Day - Last Monday in May
- Independence Day - July 4th
- Labor Day - 1st Monday in September
- Thanksgiving Day - 4th Thursday in November
- Christmas Day - December 25th

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 - 3rd Monday in January
- Presidents' Day - 3rd Monday in February
- Columbus Day - 2nd Monday in October
- Veterans' Day - November 11th

Note: When one of these holidays falls on a weekend, the holiday is usually observed on Monday, if the holiday falls on Sunday; or Friday, if 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: <i>Internet Explorer:</i> 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. <i>Firefox:</i> 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.

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 **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 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", "Form", 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

Filling a request

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 Form values.

To individually fill requests, do the following:

STEP	Action
1	Select Requests from the DOCLINE Main Menu.
2	Select Lend .
3	Click the Single tab of the Lend window. Select one request number per row from the Number drop-down list box.
4	Note: As each request number is selected, the values in the Method/Reason, Type and Form columns display the information specific to that request. The View column displays a page icon that links to the receipt. The default Action is "Filled". To view the receipt for the selected request, click the page icon displayed under the View column. To print the receipt, use your browser's print feature. Change the values under the Method/Reason, Type and Form columns as needed for each request.
5	
6	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.
7	Click Update to process these requests.
8	The DOCLINE Requests Updated window appears with the processed request number(s) displayed.
9	To process additional requests, click Return .

Filling requests in batch

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 window, enter the request number(s) in the input box. Separate entered request numbers

with a space, a comma, or a carriage return (press Enter after each request number).

In the Action field, select

Filled as Requested if the requests are being sent via the requested delivery method

OR

- 4 **Filled as Indicated** if the requests are being sent via one of the "alternate delivery methods" listed on the receipt. Choose the new delivery method from the "Method" drop-down list that appears.

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 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**.

Rejecting a request

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 Form values.

To individually reject requests, do the following:

STEP	Action
1	Select Requests from the DOCLINE Main Menu.
2	Select Lend .
3	Click the Single tab of the Lend window.
4	Select one request number per row from the Number drop-down list box.

Note: As each request number is selected, the values in the **Method/Reason**, **Type** and **Form** columns will display the information specific to that request. The **View** column displays a page icon that links to the receipt.

- 5 To view the receipt for the selected request, click the page icon displayed under the **View** column. To print the receipt, use your browser's print feature.
- 6 Select **Rejected** from the Action drop-down list box.
- 7 Select the appropriate rejection reason from the **Method/Reason** drop-down list box.
- 8 Change the values under the **Type** and **Form** columns as needed for each request.
- 9 Click **Update** to process these requests.
- 10 The **DOCLINE Requests Updated** window appears with the processed request number(s) displayed.
- 11 To process additional requests, click **Return**.

Rejecting requests in batch

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 window, enter the request number(s) in the input box. Separate entered request numbers with a space, a comma, or a line between them.
4	In the Action field, select Rejected .
5	In the Reason field, select the appropriate rejection reason from the drop-down list box.
6	Click the Update button to process these requests.
7	The DOCLINE Requests Updated window appears with the processed request number(s) displayed.
8	To process more requests, click Return .

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	<p>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.</p> <p>A maximum of 100 requests are displayed at one time beginning with the oldest transactions. As requests are processed, additional transactions are displayed.</p> <p>Note: Transactions are only available for 40 days after the filled date.</p>
3	(Optional) To eliminate transactions from libraries in a particular library group, select the desired Library Group(s) to exclude. Select REFRESH .
4	<p>(Optional) Select the desired sort of the requests. Select REFRESH.</p> <p>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.</p>
5	<p>Enter charges in US Dollars for items to be included in the billing file. DOCLINE does not store this information.</p> <p>Enter "0" if request is not to be charged. Select Skip for now to process the request at a later date.</p>

	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	<p>Requests that were previously included in an EFTS file are displayed. LIBID, institution name, transaction information, request number and filled date are displayed.</p> <p>DOCLINE does not store charges information so previously entered charges will not be displayed.</p> <p>Note: Transactions are only available for 40 days after the filled date.</p>
6	To re-process requests, enter charges in US Dollars for items to be included in a new billing file.
7	Select Continue .
8	<p>Review transaction charges. Select Back to return to modify any charges.</p> <p>Skipped transactions will remain as "already added to EFTS file". Zero charge (0) items will set as a "free" item in DOCLINE and will not be included in the EFTS file.</p> <p>(Optional) Print the confirmation page using your browser's print functionality.</p>
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. <i>LIBID</i> , institution name, transaction information, request number and filled date are displayed. Note: Transactions are only available for 40 days after

	the filled date.
6	<p>Enter charges in US Dollars for items to be included in a new billing file.</p> <p>Note: Canadian libraries should enter charges in Canadian Dollars only when billing other Canadian libraries.</p>
7	Select Continue .
8	<p>Review transaction charges. Select Back to return to modify any charges.</p> <p>Skipped transactions will remain as “already added to EFTS file”. Zero charge (0) items will set as a “free” item in DOCLINE and will not be included in the EFTS file.</p> <p>(Optional) Print the confirmation page using your browser’s print functionality.</p>
9	Select Continue .
10	Select Create EFTS File
11	Select Save when prompted to download the file.
12	<p>Accept default file name and save location, or modify to desired name and location on your computer or network.</p> <p>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.</p>
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 as a Borrower:

STEP	Action
1	Select Requests from DOCLINE Main Menu.
2	Select Status/Cancel .
3	Under Set search limits columns, select the following options from the drop-down boxes to create your search criteria:

Select request type **DOCLINE** and **Borrow**.

Select a set of requests to review: **All** (all requests as a borrower regardless of status), **Filled** (filled requests), **Pending** (requests still in process), or **Retired** (requests not filled for reason of: cost, canceled, incomplete, copyright, Beyond Routing Map, Expired).

Select the number of calendar days to search by selecting **Begin** and **End** day's values. The options are 0-40 days equal to or less than today's date. A Begin day value of '0' and End day value of '40' would search for requests with an **Action Date** between today (0) and 40 days ago.

The default values are Begin=0 and End=3 days.

- 4 From the **Sort** drop-down box, select "Asc" or "Desc" to display the results in either ascending or descending request number order. The default sort order is ascending.
Click **Go**.

View As the **borrower**, you see the last action taken on the displayed requests.

When you search for: **All**, **Filled** or **Pending**, you see the following six labeled columns of information: **Cancel**, **Request #**, **Request Date**, **Action** (last action), **Action Date** and **Institution**.

Note: The **Cancel** checkbox only displays for requests

still in process.

If you select the subset **Filled**, you get the following six labeled columns: **Request #**, **Request Date**, **Action** (filled), **Action Date** and **Lender** (the lending institution name).

If you select the subset **Retired**, you get the following six labeled columns: **Request #**, **Request Date**, **Action** (action will always be a final unfilled action, e.g., "Not Filled" or "Beyond Routing Map"), last **Action Date** and **Patron** (name).

- 5 To view a request, click the request number under the **Request #** column.
- 6 To view the lender's ILL information, including the phone contacts, 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 the "Status/Cancel" screen click the **Close** button at the bottom of the Institutions record window.
- 7 To view the history, click on the action text (e.g. "Not Filled" or "Canceled") under the **Action** column.
- 8 To return to the "Status/Cancel" screen after viewing the request or the routing history, click **Return**.

Canceling a request

To cancel a request, do the following:

STEP	Action
1	Select Requests from DOCLINE Main Menu.
2	Select Status/Cancel .
3	In the box under Enter request number column, enter the request number. OR Under Set search limits columns, go to drop-down

	<p>boxes. Select DOCLINE / Borrow / Pending. Select the number of calendar days to search by selecting Begin and End day's values. The options are 0-40 days equal to or less than today's date. A Begin day value of '0' and End day value of '40' would search for requests with an Action Date between today (0) and 40 days ago. The default values are Begin=0 and End=3 days. Click Go.</p>
<p>4</p>	<p>Under the Cancel column, select check box adjacent to the request number to be canceled. Note: Only pending requests are eligible for cancellation.</p> <p>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.</p> <p>Requests that have been Received by an institution can only be marked for cancellation. Since the potential lender may be in the 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.</p>

5	<p>Click Cancel Checked Items.</p> <p>System acknowledges the request has been canceled. Click Return.</p> <p>To deselect checked requests, click Clear Checked Items.</p>
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Viewing the routing and action history of a request

STEP	Action
1	Select Requests in the DOCLINE Main Menu
2	Select Status/Cancel .
3	In the box under Enter request number column, enter the request number.
OR	
	Under Set search limits columns, select desired values in the drop-down boxes.
	Click Go .
View	Depending upon your search limits, you will see six columns of data associated with the request(s).
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 view the lender's ILL information, including the phone contacts, charges and delivery methods, click on the LIBID next to the lending institution name. A new window will open with the ILL information.
	To return to the "Status/Cancel" screen click the Close button at the bottom of the Institutions record window.
7	To return to the "Status/Cancel" screen after viewing the request or the routing history, click Return .

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 DOCLINE Main Menu.
2	Select Status/Cancel .
3	In the box under Enter request number column, enter the request number. Click Go .
View	<p>The information displayed depends on whether you are the borrower or lender of the request you entered.</p> <p>As a borrower, you see the last action taken on the request you selected. There are six labeled columns of information: Cancel, Request #, Request Date, last Action, last Action Date and Institution. Note: The Cancel checkbox only displays for requests still in process.</p> <p>If you are the lender, you see six labeled columns of information: Borrower (name of borrowing institution), Request #, Request Date, last Action, last Action Date, and ReRoute In. Special Handling requests are marked with a red asterisk in front of the request number.</p> <p>Note on ReRoute In: On the third business day after receipt for Normal requests and the day after receipt for Rush and Urgent Patient Care requests, the system displays the number of hours remaining before the request is rerouted in the ReRoute In column of Lend. Those requests should be acted upon immediately. If the request is not acted upon that day, DOCLINE automatically routes the request to another potential lender.</p>
4	<p>To view a request, click the request number under the Request # column.</p> <p>To view the routing history as a borrower, click on the action text (e.g. "Filled") under the Action column.</p>

5	To return to the "Status/Cancel" screen after viewing the request or the routing history, click Return .
6	As a borrower, you may view the lender's ILL information, including the phone contacts, 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 Institutions record may be viewed by clicking the View Entire Record link in the upper left corner of the ILL information window.

Additional Resources:

- Request Actions
- Routing and Removal Reasons
- Rejection Reasons

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	Under Set search limits columns, select the following options from the drop-down boxes to create your search criteria: Select request type LD (Loansome Doc) and Lend . Select a set of requests to review - The four choices are: 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). Select the number of calendar days to search by selecting Begin and End day's values. The options are 0-40 days equal to or less than today's date. A Begin day value of '0' and End day value of '40' would search for requests with an Action Date between today (0) and 40 days ago. The default values are Begin=0 and End=3 days. Click here to see a complete list of LD Actions .
4	From the Sort drop-down box, select "Asc" or "Desc" to

	display the results in either ascending or descending request number order. The default sort order is ascending Click Go .
View	As the Loansome Doc lender, you see the last action taken on the Loansome Doc requests you searched. There are six labeled columns of information: Request # , Request Date , last Action , last Action Date , Patron (ID) (LD Patron name and user ID). Note: When Lend/All is viewed, items transferred to DOCLINE will have an action value which can be clicked to view the routing history. See Step 6 below.
5	To view a request, click the request number under the Request # column.
6	To view a request's history, click on the action text under Action . Note: The routing history is only available on items transferred to DOCLINE. The History of Request displayed is the DOCLINE request's routing history.
7	To return to the "Status/Cancel" screen 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 Set search limits columns, select the following options from the drop-down boxes to create your search criteria: Select request type LD and Transfer . Select a set of requests to review - The four choices are: All (all transferred LD requests regardless of their status), Filled (LD requests transferred to DOCLINE and

	<p>filled), Pending (LD requests transferred to DOCLINE and still in process), or Retired (LD requests transferred and not filled).</p> <p>Select the number of calendar days to search by selecting Begin and End day's values. The options are 0-40 days equal to or less than today's date. A Begin day value of '0' and End day value of '40' would search for requests with an Action Date between today (0) and 40 days ago. The default values are Begin=0 and End=3 days.</p> <p>Click here to see a complete list of LD Actions.</p>
4	<p>From the Sort drop-down box, select "Asc" or "Desc" to display the results in either ascending or descending request number order. The default sort order is ascending.</p> <p>Click Go.</p>
View	<p>The display will include six labeled columns of information: Request #, Request Date, last Action, last Action Date, Patron (ID) (LD Patron name and user ID).</p>
5	<p>To view a request, click the request number under the Request # column.</p>
6	<p>To view a request's history, click on the action text under Action.</p> <p>Note: The routing history is only on items transferred to DOCLINE. The History of Request displayed is the DOCLINE request's routing history for the transferred Loansome Doc request.</p>
7	<p>To return to the "Status/Cancel" screen after viewing the request or the routing history, click Return.</p>

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	From the DOCLINE Home page Select the "requests were retired unfilled" link in the

	Activity and Status area.
View	There are six labeled columns of information: Resubmit , Request # , Request Date , last Action , last Action Date and Patron name.
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 by 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 request number or red arrow under the Resubmit column.
View	The values displayed on the Citation Input , Routing Instructions , and Delivery Address pages are from the retired request.
6	Review the citation 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. <ul style="list-style-type: none"> a. If "Not Filled" (Cost), check the Maximum Cost field b. If "Not Filled" (Canceled), check with the lender c. If "Expired", check the Need by Date field d. If "Beyond Routing Map", check the Service Level, Form (Color Copy), Route to EFTS Participants Only 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 getting the request filled. For example, select Refer to Resource Libraries and Refer On After NLM , or remove the Route to EFTS Only limit.

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	Click Reset to apply your Routing Instruction values used in the retired request. Click Next .
8	Review the delivery address and modify as necessary. Click Finish . A new DOCLINE request number is generated.
9	Click Return to return to the Status/Cancel list of retired requests. Note 1: A DOCLINE request number can only be resubmitted once. Note 2: A transferred LD 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	In the box under Enter request number column, enter the request number. OR Under Set search limits columns, select the following options from the drop-down boxes to create your search criteria: Select request type DOCLINE, Borrow and Retired . Select the number of calendar days to search by selecting Begin and End day's values. The options are 0-40 days equal to or less than today's date. A Begin day value of "0" and End day value of "40" would search for requests with an Action date between today (0) and 40 days ago. The default values are Begin=0 and End=3 days.

4	<p>From the Sort drop-down box, select "Asc" or "Desc" to display the results in either ascending or descending request number order. The default sort order is ascending. Click Go.</p>
View	<p>There are six labeled columns of information: Resubmit, Request #, Request Date, last Action, last Action Date and Patron name.</p>
5	<p>To view a request, click the request number under the Request # column.</p>
6	<p>To view the history of a request, click on the action text (e.g. "Not Filled" or "Expired") under the Action column.</p> <p>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. Maximum Cost, Need No Later Than date, etc.)</p>
7	<p>To return to the "Status/Cancel" screen after viewing the request or routing history, click Return.</p>
8	<p>To resubmit a request, click on the request number or red arrow under the Resubmit column.</p>
View	<p>The values displayed on the Citation Input, Routing Instructions, and Delivery Address pages are from the retired request.</p>
9	<p>Review the citation of the retired request (non-PubMed requests only). As necessary, modify the citation on the Citation Input screen. Click Next.</p>
10	<p>Review the Routing Instructions of the retired request.</p> <ul style="list-style-type: none"> a. If "Not Filled" (Cost), check the Maximum Cost field b. If "Not Filled" (Canceled), check with the lender c. If "Expired", check the Need No Later Than date field d. If "Beyond Routing Map", check the Service Level, Form (Color Copy), Route to EFTS Participants Only limit, delivery method(s), and routing cells selected. <p>Modify the Routing Instructions as necessary to widen your pool of potential lenders to maximize the</p>

	<p>chances of getting the request filled. For example, select Refer to Resource Libraries and Refer On After NLM, or remove the Route to EFTS Only limit.</p> <p>Click Reset to apply your Routing Instruction values used in the retired request.</p> <p>Click Next.</p>
11	<p>Review the delivery address and modify as necessary. Click Finish.</p> <p>A new DOCLINE request number is generated.</p>
12	<p>Click Return to return to the Status/Cancel list of retired requests.</p> <p>Note 1: A DOCLINE request number can only be resubmitted once.</p> <p>Note 2: A transferred LD 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.</p>

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	From the DOCLINE Home page, select the "requests were retired unfilled" link in the Activity and Status area.
View	There are six labeled columns of information: Resubmit , Request # , Request Date , last Action , last Action Date and Patron name
2	To view a request, select the request number under the Request # column.

3	Select the action text (e.g. "Not Filled" or "Expired") under the Action column. The history of request is displayed.
4	To remove the individual request from the retired unfilled notification list, select Reviewed . OR Select Return to return to the Status/Cancel list of retired requests.

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

Step	Action
1	From the DOCLINE Home page, select the "requests were retired unfilled" link in the Activity and Status area.
View	There are six labeled columns of information: Resubmit, Request #, Request Date, last Action, last Action Date and Patron name
2	To view a request, select the request number under the Request # column.
3	To view the history of a request, select on the action text (e.g. "Not Filled" or "Expired") under the Action column. Select Return to return to the Status/Cancel list of retired requests.
4	To remove all requests from the retired unfilled notification list, select Reviewed .

Additional Resources:

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

Transferring Loansome Doc requests

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Libraries may transfer unfilled Loansome Doc requests into DOCLINE if they are unable to fill the request. 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 Go to retrieve all pending requests or enter a specific request number.
View	<p>Pending Loansome Doc request(s) are displayed. If an item is available free online in PubMed Central or through publisher site, a 'FREE' icon and link appears. If your library reports LinkOut holdings for the title, a message will appear. If your library reports holdings in DOCLINE, a message will appear.</p> <p>The patron's name, patron type, and authorization are displayed.</p>
5	Select Patron or Library from the Ship To select box to indicate delivery location.
	<p>Note: If selecting Ship to Patron, the patron's delivery address and delivery method are displayed in Routing Instructions. If selecting Ship to Library, the library's default delivery method and alternate delivery methods are displayed in Routing Instructions.</p>
6	Select the displayed request number(s) under the Transfer Request column to initiate the transfer into DOCLINE.
7	Review and complete the Routing Instructions . For Loansome Doc transfers, Referral Reason is required.
	<p>Note: The max cost value is taken from the amount specified in patron's request.</p>
8	Review the delivery address. Update as necessary.
9	Select 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 could not 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 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.
- 13 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.
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-SERHOLD 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.
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 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.
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 .

- 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

Maintaining Serial Holdings

Serial Holdings Overview

DOCLINE Serial Holdings contains the holdings data for over 3,200 medical libraries across the United States, Canada, and Mexico. This system provides users with the ability to add, update, and delete holdings for a specific serial for their own library or view holdings for a specific serial for other libraries. In some cases, users may have rights to update holdings for more than their own library; these users are called SERHOLD Sub-coordinators and their accounts are established and maintained by Regional DOCLINE Coordinators. In other cases, users may only have rights to view serial holdings; these rights are also established by Regional DOCLINE Coordinators.

DOCLINE is an interlibrary loan system. Holdings reported within DOCLINE are for serials for which libraries can provide interlibrary loan service. Electronic serials, including those available free online, can only be reported in DOCLINE if the library has a license to provide interlibrary loan service for that title.

Searches can be limited to holdings by filters of Year(s) Owned, Volume(s) Owned, LIBID(s) and top filters of My Library, My Library Groups, My Region, My Routing Table, Not My Routing Table, and My State/Province. Additional filters consist of Delivery Method (Ariel, Email PDF, Email TIFF, Fax, Web PDF, and Web TIFF), Membership Information (DOCLINE Participant, Open Library, Resource Library), Interlibrary Loan (EFTS Participant, Fills Rush Requests, Fills Urgent Patient Care Requests, Provides Color Copies), Holdings Format (Electronic, Microform, Text, Other), Location (State/Province, Region, and/or Library Group).

Tip: Keeping accurate serial holdings helps ensure that requests will accurately route to your institution.

What do you want to do next?

- Find Serial Holdings
- Add Serial Holdings
- Update or Delete Holdings
- Generate Serial Holdings Reports

Searching Serial Holdings

Finding 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	Select Update/View .
3	On the "Serial Holdings Search" page, enter a search term into one of the four Bibliographic Search fields.
4	Click on the Additional Filters link.
5	On the "Serial Holdings Search" page, click the Library Group link.
6	Select the desired Library Groups.
7	Click on the Back to Top link.
8	Click Add to Search
9	On the "Serial Holdings Search" page, click Search .

Tip: Top Filters are always "OR'd" together for searching and then combined via an "AND" statement with selections from the "Serial Holdings Additional Filters" page. Thus, 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** from the Top Filters; instead, you would select FreeShare, AMEDD, and AMHL from the **Library Group** section of the "Serial Holdings Additional Filters" page.

Additional resources:

- Displaying a Serial Holdings Record (with View Rights)
- Modifying your search query
- Routing of serial requests
- Searching LocatorPlus from DOCLINE Serial Holdings
- Serial Holdings Boolean Search Overview
- Serial Holdings Report Overview
- Using Top Filters to find libraries that report holding a specific serial title
- Viewing Serial Holdings Search Field Definitions

Finding libraries in a particular location that report holding a specific serial title

To find libraries in a particular U.S. State, Canadian Province, or Region 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	On the "Serial Holdings Search" page, enter a search term into one of the four Bibliographic Search fields.
4	Click on the Additional Filters link.
5	On the "Serial Holdings Search" page, click the Location link.
6	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.
7	Click on the Back to Top link.
8	Click Add to Search
9	On the "Serial Holdings Search" page, click Search .

Tip: Top Filters are always "OR'd" together for searching and then combined via an "AND" statement with selections from the "Serial Holdings Additional Filters" page. Thus, if your state is Maryland and you would like to see any holdings from Maryland or Virginia, you would **NOT** select **My State** from the Top Filters; instead, you would select Maryland or Virginia from the Location section of the "Serial Holdings Additional Filters" page.

Additional resources:

- Displaying a Serial Holdings Record (with View Rights)
- Modifying your search query
- Routing of serial requests
- Searching LocatorPlus from DOCLINE Serial Holdings
- Serial Holdings Boolean Search Overview
- Serial Holdings Report Overview
- Using Top Filters to find libraries that report holding a specific serial title
- Viewing Serial Holdings Search Field Definitions

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

Additional resources:

- Displaying a Serial Holdings Record (with View Rights)
- Modifying your search query
- Routing of serial requests
- Searching LocatorPlus from DOCLINE Serial Holdings
- Serial Holdings Boolean Search Overview
- Using Top Filters to find libraries that report holding a specific serial title
- Viewing Serial Holdings Search Field Definitions

Finding 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	Select Update/View .
3	On the "Serial Holdings Search" page, enter a search term into one of the four Bibliographic Search fields.
4	Click on the Additional Filters link.
5	On the "Serial Holdings Search" page, click the Holdings Format link.
6	Select the desired Holdings Format(s): "Electronic", "Microform", "Text", and/or "Other".
7	Click on the Back to Top link.
8	Click Add to Search .

9 On the "Serial Holdings Search" page, click **Search**.

Additional resources:

- Displaying a Serial Holdings Record (with View Rights)
- Modifying your search query
- Routing of serial requests
- Searching LocatorPlus from DOCLINE Serial Holdings
- Serial Holdings Boolean Search Overview
- Using Top Filters to find libraries that report holding a specific serial title
- Viewing Serial Holdings Search Field Definitions

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

Step	Action
1	Select Serial Holdings from the DOCLINE Main Menu.
2	Select Update/View .
3	On the "Serial Holdings Search" page, enter a search term into one of the four Bibliographic Search fields.
4	In the Filters area, input volume(s) and/or year(s) in the appropriate field and the holdings for the serial title for which you are searching would be limited to libraries that report holding that volume and/or year.
5	On the "Serial Holdings Search" page, click Search .

Tip: To facilitate searching and routing of results, libraries are encouraged to record both volume and year information in their holdings records.

Additional resources:

- Displaying a Serial Holdings Record (with View Rights)
- Modifying your search query
- Routing of serial requests
- Searching LocatorPlus from DOCLINE Serial Holdings
- Serial Holdings Boolean Search Overview
- Using Top Filters to find libraries that report holding a specific serial title
- Viewing Serial Holdings Search Field Definitions

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

Step	Action
1	Select Serial Holdings from the DOCLINE Main Menu.
2	Select Update/View .
3	On the "Serial Holdings Search" page, enter a search term into one of the four Bibliographic Search fields.
4	In the Filters area, input the LIBID(s) in the LIBID(s) field and the holdings for the serial title for which you are searching would be limited to libraries. Tip: LIBIDs can be separated by either a comma or a space. Use Institutions search to find a LIBID if you do not know it.
5	On the "Serial Holdings Search" page, click Search .

Additional resources:

- Adding a Serial Holdings Record
- Displaying a Serial Holdings Record (with Update Rights)
- Displaying a Serial Holdings Record (with View Rights)
- Modifying your search query
- Routing of serial requests
- Searching LocatorPlus from DOCLINE Serial Holdings
- Serial Holdings Boolean Search Overview
- Updating or Deleting a Serial Holdings Record
- Using Top Filters to find libraries that report holding a specific serial title
- Viewing Serial Holdings Search Field Definitions

Modifying your search query

To modify the Bibliographic Search from the "Serial Holdings Additional Filters" page:

Step	Action
1	Press Reset Bib .
2	Enter new search term into one of the four Bibliographic Search fields.
3	Add filters if desired.
4	Click Search .

To modify the Bibliographic Search from the "Serial Holdings Additional Filters" page:

Step	Action
1	From the top or bottom of the "Serial Holdings Additional Filters" page, click Add to Search .
2	On the "Serial Holdings Search" page, click Reset Bib .
3	Enter new search term into one of the four Bibliographic Search fields.
4	Add filters if desired.
5	Click Search .

To modify the Additional Filters from the "Serial Holdings Additional Filters" page:

Step	Action
1	From the top or bottom of the "Serial Holdings Additional Filters" page, click Cancel ; any changes made on the Additional Filters page will be canceled.
View	Filters listed on the "Serial Holdings Search" page.
2	Click Reset Filters and/or check/uncheck filters. (Optional)
3	Click Search .

To modify the Additional Filters from the "Serial Holdings Search" page:

Step	Action
1	Click Reset Filters .
2	Add new filters.
3	Click Search .

Additional resources:

- Finding libraries that are members of a particular library group and report holding a specific serial title
- Finding libraries in a particular location that report holding a specific serial title
- Finding libraries that provide specific Delivery Methods, Interlibrary Loan Services, and/or have particular Membership Information and report holding a specific serial title

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- Finding libraries that report holding a specific serial title in a particular holdings format
- Finding libraries that report holding a specific year or volume of a serial title
- Finding out if a particular library reports holding a specific serial title
- Routing of serial requests
- Serial Holdings Boolean Search Overview
- Using Top Filters to find libraries that report holding a specific serial title
- Viewing Serial Holdings Search Field Definitions

Searching LocatorPlus from DOCLINE Serial Holdings

Step	Action
1	Select Serial Holdings from the DOCLINE Main Menu.
2	Select Update/View .
3	On the "Serial Holdings 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 "Serial Holdings Search" page.
6	Add filters, if desired.
7	Click Search .

Additional resources:

- Modifying your search query
- Viewing Serial Holdings Search Field Definitions

Selecting a Bibliographic Record when more than one match is found

Overview

When between two and twenty bibliographic records match the search criteria you input for Journal Title/Title Abbreviation search or between two and three hundred bibliographic records match the search criteria you input for Truncated Journal Title/Title Abbreviation search, the Bibliographic Record Selection screen appears.

If more than twenty bibliographic records match the user input search criteria for Journal Title/Title Abbreviation search or more than 300 bibliographic records match the user input search criteria for Truncated Journal Title/Title Abbreviation search, an error message will display instructing the user to search LocatorPlus to find the appropriate serial.

Step	Action
1	Review the bibliographic information provided.
2	Once you have identified the correct title, click on the hyperlinked title for the appropriate record.

Tip: If you are unable to determine which title is the correct title, do the following:

- a. Click **Return**
- b. Click **LocatorPlus** in order to search LocatorPlus and view the entire bibliographic record.

Additional resources:

- Searching LocatorPlus from DOCLINE Serial Holdings

Serial Holdings Boolean Search Overview

Bibliographic Search: Because DOCLINE searches various NLM catalog indexes in a particular hierarchy, it is important to Reset Bib after each title search unless, of course, you would like to search for the same title again. If NLM Unique ID is present, all other bibliographic fields will be ignored and the NLM Unique ID will be used to find a matching record in NLM's online catalog, LocatorPlus.

The bibliographic searching in DOCLINE is not as powerful as in LocatorPlus. If a title cannot be found by using DOCLINE Serial Holdings search, better results might be found using the LocatorPlus button located on the "DOCLINE Serial Holdings Search" page. Once a single bibliographic record is identified in LocatorPlus, the search results can be returned to DOCLINE and a search for that title along with corresponding holdings records can be performed.

Holdings Search:

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

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.
LIBID(s)	"OR'd" with all other filter/grouped filters.

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

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

Additional Filters	Boolean Search Information
Delivery Methods	Delivery Method filters are grouped together and then: "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	Each specific Membership Information filter is: "OR'd" with My Library and LIBID(s) "AND'd" with all other filter/grouped filters.
Interlibrary Loan	Each specific Interlibrary Loan filter is: "OR'd" with My Library and LIBID(s) "AND'd" with all other filter/grouped filters.
Holdings Format	Holdings Format filters are grouped together and then: "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.
Location: State/Province	State/Province Location filters are grouped together and 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.

**Location:
Region**

Region Location filters are grouped together 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

Library Group filters are grouped together 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.

Additional resources:

- Finding libraries that are members of a particular library group and report holding a specific serial title
- Finding libraries in a particular location that report holding a specific serial title
- Finding libraries that provide specific Delivery Methods, Interlibrary Loan Services, and/or have particular Membership Information and report holding a specific serial title
- Finding libraries that report holding a specific serial title in a particular holdings format
- Finding libraries that report holding a specific year or volume of a serial title
- Modifying your search query
- Routing of serial requests
- Serial Holdings Boolean Search Overview
- Using Top Filters to find libraries that report holding a specific serial title
- Viewing Serial Holdings Search Field Definitions

Using Top Filters to find libraries that report holding a specific serial title

Step	Action
1	Select Serial Holdings from the DOCLINE Main Menu.
2	Select Update/View .
3	On the "Serial Holdings Search" page, enter a search term into one of the four Bibliographic Search fields.
4	Click any of the six Top Filters checkboxes and the holdings for the serial title for which you are searching would be limited to those libraries.
5	On the "Serial Holdings Search" page, click Search .

Tip: Top Filters are always "OR'd" together for searching and then combined via an "AND" statement with selections from the "Serial Holdings Additional Filters" page. Thus, if your state is Maryland and you would like to see any holdings from Maryland or Virginia, you would NOT select "My State" from the Top Filters; instead, you would select both Maryland and Virginia from the Location section of the "Serial Holdings Additional Filters" page.

Additional resources:

- Adding a Serial Holdings Record
- Displaying a Serial Holdings Record (with Update Rights)
- Displaying a Serial Holdings Record (with View Rights)
- Finding libraries that are members of a particular library group and report holding a specific serial title
- Finding libraries in a particular location that report holding a specific serial title
- Modifying your search query
- Searching LocatorPlus from DOCLINE Serial Holdings
- Searching Holdings Boolean Search Overview
- Updating or Deleting a Serial Holdings Record
- Modifying your delivery methods

Adding a Serial Holdings Record

Overview

The Serial Holdings Add screen appears when a user clicks on the **ADD** button from the **Record Display** screen **OR** when no records are found that match the search limits in effect and the user has rights to add holdings. You will only be able to add records for libraries for which you have update rights. Rights are determined by Serial Holdings authorizations that are established by the Regional DOCLINE Coordinator.

Data Displayed	Description
Search Criteria	Bibliographic search information input followed by the field name in parentheses.
Search Limits in Effect	Serial Holdings search limits selected or input by the user followed by the field name in parentheses.
Owning Library Name	The library's name. The name is taken from the Document Delivery Institution field in the Institution record.
Owning Library City	The library's city. The city is taken from the Document Delivery City field in the Institution record.
Owning Library State/Province	The library's state or province code. The U.S. state or Canadian province code is taken from the Document Delivery State/Province field in the Institution record.
Owning Library LIBID	The library's LIBID.

The bibliographic information for holdings that displays consists of:

- a. Journal Title
- b. NLM Unique ID
- c. ISSN
- d. Publisher
- e. Place of Publication
- f. Publication Dates
- g. Frequency
- h. Continuation Notes (if no notes exist, this field will not display)

The holdings information that displays consists of:

- a. Owning Library
- b. Retention Policy
- c. Physical Format
- d. Completeness
- e. Commitment Level

- f. Acquisition Status
- g. Holdings Owned

Function	Action
Add Holdings	<p>Click on the Checkbox in front of the library or libraries on the left side of your screen in order to add holdings. Note: If you selected only one library to add holdings for on the Record Display screen, the system will automatically fill in the checkbox for you.</p> <p>Change the Retention if necessary. The default is Permanently Retained.</p> <p>Select the appropriate Acquisition Status. Fill in Holdings Owned information.</p> <p>Note: For Permanently Retained, gaps are indicated by separate rows (occurrences).</p>

Buttons (for Permanently Retained Holdings Information)

Button	Button Definition
Insert Row	Adds another holdings row (occurrence).
Delete	Deletes the holdings row (occurrence) that the cursor is in.
Reset	Clears changes within the holdings and returns the holdings to the original form.
Delete All	Deletes all holdings rows (occurrences).
Sort	Sorts the holdings rows (occurrences) by years and then by volumes.

Buttons

Button	Button Definition
Add	Adds the holdings record to Serial Holdings.
Return to Search	Cancel the add process and returns the user to the Search screen.
Reset	Removes all user input.
Help	Retrieves this Help Window.

Adding a Serial Holdings Record for multiple libraries

Only DOCLINE Serial Holdings Coordinators have rights to add holdings for multiple libraries. You will only be able to add records for libraries for which you have update rights. Rights are determined by Serial Holdings authorizations that are established by the Regional DOCLINE Coordinator.

Step	Action
1	Select Serial Holdings from the DOCLINE Main Menu.
2	Select Update/View .
3	On the "Serial Holdings Search" page, enter a search term into one of the four Bibliographic Search fields.
4	In the Filters area, input the LIBID(s), State/Province(s), or Library Group(s) in the corresponding field and the holdings for the serial title for which you are searching would be limited to those libraries. Tip: LIBIDs can be separated by either a comma or a space. Use Institutions search to find a LIBID if you do not know it.
5	On the "Serial Holdings Search" page, click Search .
6	On the left side of the screen under "Search Results" and the listing of libraries that currently report holdings, click on the checkbox in front of each LIBID for which you want to add holdings.
7	Select the appropriate Retention Policy Note: The default is Permanent Retention.
8	Select the appropriate Acquisition Status .
9	Input the Volumes and/Year information for the holdings owned.
10	Click Add .
11	Repeat steps 6-10 until all holdings that you wish to add for that title have been added.

Displaying a Serial Holdings Record (with Update Rights)

Overview

The Serial Holdings Record Display screen appears after the system performed a Serial Holdings search and retrieved one bibliographic record and one to 100 holdings records. You may view holdings, and, with the proper authorizations, proceed to add, update, or delete holdings from this screen.

Data Displayed	Description
Search Criteria	Bibliographic search information input followed by the field name in parentheses.
Search Limits in Effect	Serial Holdings search limits selected or input by the user followed by the field name in parentheses.
Search Results	<p>The number of holdings records that match both the search criteria and the search limits.</p> <p>An alphabetic list of LIBIDs and the corresponding status, if a library is closed, a demonstration library, or is inactive, displays.</p> <p>An icon displays next to each LIBID. To view the Institutions record for a particular library, click on the icon to the left of the LIBID. An abbreviated Institution record displays with ILL contact information, ILL charge information, and a list of library groups to which the library belongs. To view the entire Institution record, click on the View Entire Record link. To return to the Serial Holdings display screen, click the Close Window link.</p> <p>To display the holdings record for a particular LIBID, click on the appropriate LIBID hyperlink.</p> <p>To see the Document Delivery Institution, City, and State from the Institution record display, in the status area at the bottom of the window hold the cursor over the LIBID hyperlink.</p>
Add holding for	An alphabetic list of LIBIDs for which:

	<ol style="list-style-type: none"> 1. Search Limits included either the LIBID or a Library Group of which the library is a member; AND, 2. No holdings for that title are held by that library; AND 3. The user has rights to update holdings for that library. <p>To add holdings, click on the checkbox(es) in front of the LIBID(s) and click the ADD button.</p>
<p>No Institutions Record Found</p>	<p>An alphabetic list of LIBIDs for which:</p> <ol style="list-style-type: none"> 1. Search Limits included the LIBID; AND, 2. There is no Institutions record for that LIBID.

The bibliographic information for holdings that displays consists of:

- a. Journal Title
- b. NLM Unique ID
- c. ISSN
- d. Publisher
- e. Place of Publication
- f. Publication Dates
- g. Frequency
- h. Continuation Notes (if no notes exist, this field will not display)

The holdings information that displays consists of:

- a. Owning Library
- b. Volumes Held (when retention is permanent)
- c. Years Held (when retention is permanent)
- d. Limited Retention (when retention is limited)
- e. Physical Format
- f. Completeness
- g. Acquisition Status
- h. Retention Policy
- i. Commitment Level
- j. Added/Modified Date and USERID
- k. Encoding Level

Function	Action
View Holdings	<p>On the left side of the screen under "Search Results":</p> <p>Click the appropriate LIBID hyperlink.</p> <p>The holdings for that LIBID will display.</p>
View Institutions Information	<p>On the left side of the screen under "Search Results":</p> <p>Click on the icon located to the left of the appropriate LIBID hyperlink.</p> <p>The ILL Info window opens which displays Interlibrary Loan contact information, charge information, and library group data for that LIBID. To view the entire Institution record, click the View Entire Record link. To return to the Serial Holdings record from the ILL Info window, click the Close Window link.</p>
Update Holdings	<p>At the bottom of the screen:</p> <p>Click the UPDATE button.</p> <p>The Serial Holdings Update Screen displays.</p> <p>Make the appropriate changes.</p> <p>Click the UPDATE button.</p> <p>Note: If you do not have rights to update or delete a record, the UPDATE and DELETE buttons will not be displayed.</p>
Delete Holdings	<p>At the bottom of the screen:</p> <p>Click the DELETE button.</p> <p>The following message displays:</p> <p><i>Click OK to delete the holdings record for LIBID.</i></p> <p><i>Click CANCEL to return to the holdings record without deleting it.</i></p> <p>Click the OK button.</p> <p>The holdings record is permanently deleted.</p> <p>Note: If you do not have rights to update or</p>

	delete a record, the UPDATE and DELETE buttons will not be displayed.
Add Holdings	<p>On the left side of the screen under "Add Holding for":</p> <p style="padding-left: 40px;">Click on checkbox next to the appropriate LIBID(s) hyperlink. Click the ADD button.</p> <p>The Serial Holdings ADD screen will display. See HELP on the ADD screen for additional information about adding holdings.</p> <p>Note: The "Add Holding for" label only displays when you have authorization to add records and have limited the initial search by Library Group or LIBID.</p>

Buttons

Button	Button Definition
Update	<p>Takes you to the Serial Holdings Update screen.</p> <p>This button displays whenever user has rights to edit the record. Rights are determined by Serial Holdings authorizations that are established by the Regional DOCLINE Coordinator.</p>
Delete	<p>Permanently deletes the selected holdings record once you have confirmed that you really want to delete the record.</p> <p>The confirmation message is: "Click OK to delete the holdings record for LIBID. Click CANCEL to return to the holdings record without deleting it."</p> <p>The DELETE button displays if you have rights to edit the record; if you have rights to edit a record, you have rights to delete the record. Rights are determined by Serial Holdings authorizations that are established by your</p>

	Regional DOCLINE Coordinator.
Return	Returns to Serial Holdings Add/Update screen.
Help	Retrieves the Help Window.

Displaying a Serial Holdings Record (with View Rights)

Overview

The Serial Holdings Record Display screen appears after the system performed a Serial Holdings search and retrieved one bibliographic record and one to 100 holdings records. You may view holdings, and, with the proper authorizations, proceed to add, update, or delete holdings from this screen.

Data Displayed	Description
Search Criteria	Bibliographic search information input followed by the field name in parentheses.
Search Limits in Effect	Serial Holdings search limits selected or input by the user followed by the field name in parentheses.
Search Results	<p>The number of holdings records that match both the search criteria and the search limits.</p> <p>An alphabetic list of LIBIDs and the corresponding status, if a library is closed, a demonstration library, or is inactive, displays.</p> <p>An icon displays next to each LIBID. To view the Institutions record for a particular library, click on the icon to the left of the LIBID. An abbreviated Institution record displays with ILL contact information, ILL charge information, and a list of library groups to which the library belongs. To view the entire Institutions record, click on the View Entire Record link. To return to the Serial Holdings display screen, click the Close Window link.</p> <p>To display the holdings record for a particular LIBID, click on the appropriate LIBID hyperlink.</p>

	To see the Document Delivery Institution, City, and State from Institution record display, in the status area at the bottom of the window hold the cursor over the LIBID hyperlink.
No Institutions Record Found	An alphabetic list of LIBIDs for which: <ol style="list-style-type: none"> 1. Search Limits included the LIBID; AND, 2. There is no Institutions record for that LIBID.

The bibliographic information for holdings that displays consists of:

- a. Journal Title
- b. NLM Unique ID
- c. ISSN
- d. Publisher
- e. Place of Publication
- f. Publication Dates
- g. Frequency
- h. Continuation Notes (if no notes exist, this field will not display)
- i. NLM Unique ID

The holdings information that displays consists of:

- a. Owning Library
- b. Volumes Held (when retention is permanent)
- c. Years Held (when retention is permanent)
- d. Limited Retention (when retention is limited)
- e. Physical Format
- f. Completeness
- g. Acquisition Status
- h. Retention Policy
- i. Commitment Level
- j. Added/Modified Date and USERID
- k. Encoding Level

Function	Action
View Holdings	On the left side of the screen under "Search Results":

	<p>Click the appropriate LIBID hyperlink.</p> <p>The holdings for that LIBID will display.</p>
View Institution Information	<p>On the left side of the screen under "Search Results":</p> <p>Click on the icon located to the left of the appropriate LIBID hyperlink.</p> <p>The ILL Info window opens which displays Interlibrary Loan contact information, charge information, and library group data for that LIBID. To view the entire Institution record, click the View Entire Record link. To return to the Serial Holdings record from the ILL Info window, click the Close Window link.</p>

Buttons

Button	Button Definition
Return to Search	Returns to Serial Holdings View screen.
Help	Retrieves this Help Window.

Updating or Deleting a Serial Holdings Record

Overview

The Serial Holdings Record Update screen appears when a user clicks on the UPDATE button from the Record Display screen. You will only be able to update records that you have been authorized to update. Rights are determined by Serial Holdings authorizations that are established by the Regional DOCLINE Coordinator.

Data Displayed	Description
Search Criteria	Bibliographic search information input followed by the field name in parentheses.
Search Limits in Effect	Serial Holdings search limits selected or input by the user followed by the field name in parentheses.
Owning Library	The library's name. The name is taken from

Name	the Document Delivery Institution field in the Address section of the Institution record.
Owning Library City	The library's city. The city is taken from the Document Delivery City field in the Address section of the Institution record.
Owning Library State/Province	The library's U.S. state or Canadian province code. The state or province code is taken from the Document Delivery State/Province field in the Address section of the Institution record.
Owning Library LIBID	The library's LIBID.

The bibliographic information for holdings that displays consists of:

- a. Journal Title
- b. NLM Unique ID
- c. ISSN
- d. Publisher
- e. Place of Publication
- f. Publication Dates
- g. Frequency
- h. Continuation Notes (if no notes exist, this field will not display)

The holdings information that displays consists of:

- a. Owning Library
- b. Encoding Level
- c. Retention Policy
- d. Physical Format
- e. Completeness
- f. Commitment Level
- g. Date Last Added or Modified
- h. Acquisition Status
- i. Holdings Owned

Function	Action
Update Holdings	Change holdings information as appropriate. Click the UPDATE button.

Buttons (for Permanently Retained Holdings Information)

Button	Button Definition
Insert Row	Adds another holdings row (occurrence).
Delete	Deletes the holdings row (occurrence) that the cursor is in.
Reset	Clears changes within the holdings and returns the holdings to the original form.
Delete All	Deletes all holdings rows (occurrences).
Sort	Sorts the holdings rows (occurrences) by years and then by volumes.

Buttons

Button	Button Definition
Update	Saves the changes to the holdings record.
Return to Search	Cancel the changes and returns the user to the Record Display screen.
Reset	Removes all user input.
Help	Retrieves this Help Window.

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, 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 menubar. 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 he/she has been granted rights. The data is sorted by title. The user can choose the

	<p>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, 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.</p>
<p>Holdings not Updated within One Year</p>	<p>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.</p> <p>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.</p> <p>A user can produce this report for any single library, library group, and/or state/province for which he/she has been granted rights.</p> <p>When running the report for a library group or state/province, the data is sorted by LIBID.</p>

	<p>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 Holdings Last Reviewed on) will not display. To see more information about this report, look at Holdings Not Updated within One Year.</p>
<p>Holdings Outside of Publication Date</p>	<p>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.</p> <p>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.</p>
<p>Level 2 Holdings</p>	<p>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 these</p>

	<p>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?</p> <p>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.</p>
<p>NLM Serial Title Changes</p>	<p>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?</p> <p>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</p>

	<p>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.</p>
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Union List Products (Holdings by Library Group and Holdings by State/Province):

Report Name	Description
<p>Holdings by Library Group</p>	<p>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 Holdings Coordinators, who have rights to update holdings for libraries other than their own, can view holdings for all appropriate library groups.</p> <p>When the user clicks on the Union Lists hyperlink, a listing of holdings for Library Groups that the user is authorized to view will display. Reports are in both standard (viewable/printable) and delimited (save to a database) format. They are listed alphabetically by Library Group Code. The standard format report is listed first and includes the Library Group Name and the date the report was last updated. Delimited format reports are listed next and include the Library Group Code and the date the report was last updated; the first line of the report consists of field names.</p> <p>Ex. <i>Union List</i> Product for AFMLC, Air Force Medical Library Consortium</p> <p>Holdings for Air Force Medical Library</p>

	<p>Consortium as of 10-14-2000</p> <p>Delimited format Holdings for Library Group AFMLC as of 10-14-2000</p> <p>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.</p> <p>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 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).</p>
<p>Holdings by State/Province</p>	<p>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</p>

own, can view holdings for all appropriate states/provinces.

When the user clicks on the Union Lists hyperlink, a listing of holdings for States/Provinces that the user is authorized to view will display. Reports are in both standard (viewable/printable) and delimited (save to a database) format. They are listed alphabetically by Library Group Code. The standard format report the State/Province name and the date the report was last updated. Delimited format reports include the State/Province name and the date the report was last updated; the first line of the report consists of field names.

Ex. *Union List* Product for Alaska

Holdings for Alaska as of 10-19-2000

Delimited format Holdings for Alaska as of 10-19-2000

The data is sorted by Title and then by 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: State/Province (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, 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. 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. If a change is needed to state/province membership, contact your Regional DOCLINE Coordinator (a listing of Coordinators is located at the end of the SERHOLD Fact Sheet).
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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 provided from DOCLINE in MARC 21 format are holdings data from DOCLINE 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 that data into a system that uses 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
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Generating Serial Holdings Reports

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 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 yyyyymmddhhmmss format
Date entered on file	008	00-05	ILS Created Timestamp in yymmdd format
Type of date/Publication	008	06	c = currently published d = ceased publication

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status					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			
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	a	Number of non-filing characters Serial Name Note: The title that appears in SERHOLD is created from various fields in the MARC record -- If a

Generating Serial Holdings Reports

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 Corporate Name (110) or Conference Name (111), if they exist.

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)

Place of Publication 260

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 780/785

Continuation Notes (See 780/785 specs below)

780-785 Instructions:

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
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			<i>Encoding_Level</i>
Item information in record	Leader	18			n
Undefined Character Position	Leader	19			blank
Length of the length-of-field position	Leader	20			4
Length of the starting-character-position portion	Leader	21			5

Generating Serial Holdings Reports

Length of the implementation-defined portion	Leader	22	0
Undefined Tag	Leader	23	0
Field Length	Directory	00-02	
	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		<i>NLM_Unique_ID</i>
Record			
Date and Time of Latest Transaction	005		<i>Last_Update_Date</i> in yyyymmddhhmmss.f format
Date entered on file	008	00-05	<i>Date_Entered</i> in yymmdd format
Receipt or acquisition status	008	06	<i>Acquisition</i> Valid SERHOLD 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	<i>Retention Policy</i> 6 -- Retained for a limited period 8 -- Permanently retained

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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)

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

Generating Serial Holdings Reports

Separate or composite copy report	008	25			0
Date of report	008	26-31			<p>Last_Update_Date in yymmdd format</p> <p>Textual value of Physical Format</p>
Location Holding institution or library	852		[blank] -- No info provided	[blank] -- No info	a LIBID
Nonpublic note					x Commitment Level Z -- No special commitment to retain N -- Will hold title for national commitment R -- Will not cancel title without notifying resource libraries S -- Will hold title for state commitment C -- Will hold title for consortium/local commitment
Public note					z Spec_Reten_Year when value is 10 or n and <i>Retention_Policy</i> is 6.
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 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
					a If volumes present: v.
					i If years present: (year) See 853/863 Instructions below.

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Enumeration & 863
 chronology of
 basic volumes

Encoding_Level Form of
 holdings
 Field encoding level **0** --
 Compressed
 [i.e.,
 expressed as a
 range]
 2 -- Holdings
 Level 2
 3 -- Holdings
 Level 3

8

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.

a

First level of
 enumeration
 [matches caption in
 853 \$a]

i

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 and
 this is the highest
 year)

End_Year (if exists
 and End_Year and
 Begin_Year are not
 identical - unless
 there is a
 corresponding End
 Volume and End
 Year must be
 included to balance
 holdings)
 / followed by
Cross_End_Year
 (only if exists; do
 not use /if no
 Cross_End_Year)

See 853/863
 Instructions below.

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.

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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, Holdings, Retention Policy, and Acquisition Status. Any fields that have no data will not display.

Procedures 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.
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. 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).
- d. Each report will be deleted from the DOCLINE system one week after creation even if the report has not been viewed.
- e. Report 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 reports.

Review Reports Overview

The Review Reports screen appears when the user clicks on the Review Reports button that is listed on the left side of the screen under the Create Reports button. This screen displays all pending and completed reports that have been submitted by the user as well as reports that are systems generated (such as SERHOLD to OCLC error reports for libraries that participate in SERHOLD to OCLC and errors are identified) and union list products. To view the report, click on 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 Records	The 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	Cancel 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 "Download – Delimited" option 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, 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 to paste the data and then to print the data.

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 click on the appropriate Report Name hyperlink.
5	After the report displays, right click on the report.
6	Select This Frame and then select Show Only This Frame .
7	Select Print .

Additional Resources:

- 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.

- 5 **Select Report Field:** 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 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. 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 Level
- Update ID
- Date Added/Modified
- Encoding Level

Additional resources:

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

Serial 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 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 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 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.
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:

- 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 creates them (e.g., if I create a report when I am logged in with USERID XXX61, I must log in as USERID XXX61 to retrieve the report).
- f. 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.
- 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 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 the 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 part of the Membership section of the Institution record. When a holdings record is updated, the Update Date is changed in the Serial Holdings Update History part of the Membership section of the Institution record. 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,

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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 rights 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 Serial Holdings from the DOCLINE Menubar.
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 step6.
	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:

- 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.

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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, 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 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 on the Holdings Outside of Publication Date hyperlink in the left sidebar.
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:

Additional Information:

- a. Each user with Serial Holdings update rights can submit these reports.
- b. These reports will be current as of the time that they are run.

- c. 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).
- d. If a second report of the same type (ex. Holdings by Library) for the same library is requested by the same user, the first report will be replaced by the second report.
- e. 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.
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 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.

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.

Generating Serial Holdings Reports

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.

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.

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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: <ol style="list-style-type: none"> Select the desired <i>Search Field</i> to query Select or enter search term (e.g. Contains, Equal to, Begins with, etc.) <p>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).</p> 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 <ol style="list-style-type: none"> Press any of the buttons in the <i>Filters</i> box (Delivery Methods, Membership Information, or Services) Select the search limits to apply to the search 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 <i>View Options</i> area.
2	Select one of the five categories of information to display from the <i>View</i> 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 <i>View Options</i> 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 <i>View Options</i> area.
2	Select the number of institutions to display from the <i>Results per page</i> 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:

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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 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	<p>Click REQUEST APPROVAL.</p> <p>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.</p> <p>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.</p>

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 your library's institution record is displayed. The Address page 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, or Ariel.

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 filled 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.

DOCLINE and NN/LM Membership

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 .

Services and Fees

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 . <ul style="list-style-type: none"> • 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 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 <i>Charges</i> (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	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	Select the default Form of your requests: Copy , Color Copy , or Original (Loan).

- 5 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).
- 6 Select the default **Service Level: Normal, Rush, or Urgent Patient Care**
- 7 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.
- 8 Set the default for **Route Only to EFTS Participants:** selected = **Yes** or deselected = **No**
- 9 Enter the default authorization for ILL material in the **Authorized by** field.
- 10 Select the default **Network Delivery Method**
- 11 Select the default **Network Alternate Delivery Method(s)**
- 12 Select the default **NLM Delivery Method**
- 13 Enter the default **Comments to Lenders** to display on DOCLINE Receipts.
- 14 In the "Serial Routing" area, indicate the default routing instructions for serials including your "Routing Table Default Cells", whether to **Route to Resource Libraries**, whether to **Route to NLM**, and whether to **Route Beyond NLM**.
- 15 Click **Save**.

Additional Resources:

- [Completing the Routing Instructions Page](#)
- [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 View 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	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.

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.

Not2e: 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

Managing your Serials Routing Table

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 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 .
8	Note: Library Groups cannot be deleted by a library. DOCLINE automatically deletes a Library Group from your Routing Table or Workspace as your RML 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 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 " <i>Serial Routing</i> " 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

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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, 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 plus Routing Table Overview 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 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	(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.
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**.

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 .

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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

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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 <i>Provides</i> (Checked = Yes).
7	Indicate whether your library charges for Loansome Doc service for each of the user populations by checking the box under <i>Charges</i> (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: <ol style="list-style-type: none">Select the desired "Search in" field to querySelect search term (e.g. Contains, Equal to, Begins with, etc.) <p>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).</p>
3	(Optional) To search additional fields, select a Boolean operator (and, or, not) and repeat Step 2.
4	(Optional) To limit your search results <ol style="list-style-type: none">Select a value from the <i>Only if</i> 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 .

Addition Resources:

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

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	Under Set search limits columns, select the following options from the drop-down boxes to create your search criteria:

	<p>Select request type LD (Loansome Doc) and Lend. Select a set of requests to review - The four choices are: 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).</p> <p>Select the number of calendar days to search by selecting Begin and End day's values. The options are 0-40 days equal to or less than today's date. A Begin day value of '0' and End day value of '40' would search for requests with an Action Date between today (0) and 40 days ago. The default values are Begin=0 and End=3 days.</p> <p>Click here to see a complete list of LD Actions.</p>
4	<p>From the Sort drop-down box, select "Asc" or "Desc" to display the results in either ascending or descending request number order. The default sort order is ascending</p> <p>Click Go.</p>
View	<p>As the Loansome Doc lender, you see the last action taken on the Loansome Doc requests you searched. There are six labeled columns of information: Request #, Request Date, last Action, last Action Date, Patron (ID) (LD Patron name and user ID).</p> <p>Note: When Lend/All is viewed, items transferred to DOCLINE will have an action value which can be clicked to view the routing history. See Step 6 below.</p>
5	<p>To view a request, click the request number under the Request # column.</p>
6	<p>To view a request's history, click on the action text under Action.</p> <p>Note: The routing history is only available on items transferred to DOCLINE.</p> <p>The History of Request displayed is the DOCLINE request's routing history.</p>
7	<p>To return to the "Status/Cancel" screen after viewing the request or the routing history, click Return.</p>

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	<p>Under Set search limits columns, select the following options from the drop-down boxes to create your search criteria:</p> <p>Select request type LD and Transfer.</p> <p>Select a set of requests to review - The four choices are: All (all transferred LD requests regardless of their status), Filled (LD requests transferred to DOCLINE and filled), Pending (LD requests transferred to DOCLINE and still in process), or Retired (LD requests transferred and not filled).</p> <p>Select the number of calendar days to search by selecting Begin and End day's values. The options are 0-40 days equal to or less than today's date. A Begin day value of '0' and End day value of '40' would search for requests with an Action Date between today (0) and 40 days ago. The default values are Begin=0 and End=3 days.</p> <p>Click here to see a complete list of LD Actions.</p>
4	<p>From the Sort drop-down box, select "Asc" or "Desc" to display the results in either ascending or descending request number order. The default sort order is ascending.</p> <p>Click Go.</p>
View	<p>The display will include six labeled columns of information: Request #, Request Date, last Action, last Action Date, Patron (ID) (LD Patron name and user ID).</p>
5	<p>To view a request, click the request number under the Request # column.</p>
6	<p>To view a request's history, click on the action text under Action.</p> <p>Note: The routing history is only on items transferred to DOCLINE. The History of Request displayed is the DOCLINE request's routing history for the transferred Loansome Doc request.</p>

- 7 To return to the "Status/Cancel" screen after viewing the request or the routing history, click **Return**.

Additional Resources:

- Transferring Loansome Doc requests

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

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 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

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 <i>Provides</i> (Checked = Yes).
7	Indicate whether your library charges for Loansome Doc service for each of the user populations by checking the box under <i>Charges</i> (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

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

Printing DOCLINE Manual Sections using Adobe Reader

Open the DOCLINE Manual using Adobe Reader. If necessary, choose **View > Navigation Panels > Bookmarks** so the bookmarks appear in the navigation pane.

Select one or more bookmarked chapters or topics. Use **Ctrl** key to select multiple chapters or topics. Bookmarks display DOCLINE Manual topics in a hierarchy, with top level bookmarks for functional topics (e.g., Lending) and linked lower level bookmarks for individual topics.

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