

DOCLINE Tune-Up:

Ten Quick Things to Make DOCLINE Work Better

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#1 Double-Check Doc Delivery Address

- ⦿ Sounds silly, but take a moment to double-check your document delivery address
- ⦿ Institutions Tab
- ⦿ Click on “Update LIBID” button
- ⦿ Under “Address,” review your Document Delivery Address and double-check e-mail, Ariel (if applicable), and fax address

#2 Remove “Mail” as Preferred Network Delivery Method/Remove “Mail” as Available Delivery Method

- Several libraries still report “Mail” as their preferred Network Delivery Method; if this is no longer the case, update borrowing preferences accordingly
- Institutions Tab—Click on “Update LIBID”
- Click on “DOCLINE Options” button on left side
- Under “Borrowing Preferences” at top of screen, use drop-down menu to select preferred Network Delivery Method
- If your library does not wish to provide Mail delivery service, remove it from “Lending Preferences” at bottom of “DOCLINE Options” page

#3 Register for E-mail Notifications

- A new feature of DOCLINE 3.3, registering for e-mail notifications allows DOCLINE to send you an e-mail message any time a regular, rush, or urgent patient care request is received by your library
- Institutions Tab—Click on “Update LIBID”
- Click on “DOCLINE Options” button on left side
- Under “Lending Preferences” at bottom of screen, select requests for which you would like to be notified
- Enter e-mail address to which notifications should be sent

#4 Utilize the Out of Office Planner

- DOCLINE's Out of Office Planner allows libraries to temporarily deactivate DOCLINE during scheduled absences.
- Institutions Tab
- Click on "Update LIBID" button
- Click the "Out of Office" on the right navigation
- Enter dates to deactivate and reactivate DOCLINE
- Please provide two business days to make sure the request is entered into the system

#5 Update SERHOLD Records

- ◉ Regular SERHOLD maintenance can ensure that you are receiving requests for only those titles which are available for ILL
- ◉ Serial Holdings Tab
- ◉ Click on Reports
- ◉ Either the “Holdings by Library” or “Holdings Not Updated in One Year” can help complete a quick update of SERHOLD
- ◉ Select telling categories from the Report Fields—
Acquisitions Status, Physical Format, Retention Policy
- ◉ Export as CSV to quickly sort categories and identify anomalies

#6 Clean Your Routing Table

- ⦿ **“Closed” and “Not a DOCLINE Library” members serve no purpose in your library routing table. Remove all libraries listed as “Closed” or “Not a DOCLINE Library”**
- ⦿ **Utilize Library Groups as much as possible. If you have a library group listed in your Routing Table Workspace, consider adding it to your routing table. If you have a library group listed in your Routing Table Workspace to which you no longer wish to belong, contact the RML to remove you from the roster.**

#7 Add Heavy Lenders Early in Your Routing Table

- Improve the efficiency and turn-around from your routing table by identifying heavy lenders and moving them into earlier cells
- Consult Report 1-2A “Detailed DOCLINE Borrower Statistics” (Requests tab, “Reports” button) to identify those libraries which most consistently fill your requests
- Double-check costs and services before adding or moving libraries (search by LIBID under institutions tab)
- Add to routing table or move libraries up in current cell order

#8 Utilize Additional Routing Options After Routing Table

- Requests don't have to terminate after routing through cell 9—Refer on to Resource Libraries (\$11 or less for standard service); Route to NLM; and Route Beyond NLM allows your request to route beyond the routing table to a larger pool of potential lenders
- Lenders will not fill if it exceeds the Maximum Cost field (i.e. won't help if your max cost is \$0.00)

#9 Utilize SERHOLD to OCLC Batch Update

- For OCLC libraries, DOCLINE SERHOLD to OCLC Batch Update feature can save you considerable time and effort
- DOCLINE will export holdings quarterly from DOCLINE SERHOLD and send an XML file to OCLC with your OCLC code for updating OCLC Local Holdings Records
- Institutions Tab—Click on “Update LIBID”
- Click on “Membership” button at right and scroll down to Serial Holdings
- Use drop-down menu for “Batch Update Authorization” and provide OCLC code under Organization ID

#10 Join EFTS!

- ⦿ Joining EFTS, doesn't just help you, it helps everyone by eliminating the general potential for paper billing
- ⦿ MAR is currently offering funding for new libraries to join EFTS (visit <http://nnlm.gov/mar/funding/efts.html>)

#11 Contact the RML!

- Toll-Free 1-800-338-7657
- Staff-wide e-mail rml@library.med.nyu.edu
- We are here to help with any problems you encounter—routing table consultation, SERHOLD questions/help, etc.
- We are hard workers who want to help you
- We are responsive to your questions and take note of them to share with NLM when they seek suggestions for improving DOCLINE