DOCLINE for Beginners

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Course Objectives

By the end of this session you will know:

- Homepage Navigation
- Borrowing Options
- Lending Functions
- SERHOLD Searching

DOCLINE Homepage

Navigating the Homepage

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, Receipt, Reports, Status/Cancel
- ▸ **Serial Holdings** - Add/Update, View, Reports
- ▸ **Institutions** - Search, Update (*your LIBID*)
- ▸ **Loansome Doc Patrons**

Additional Homepage Features

Help | FAQ | Contact Us | Preferences | Log Out

nstitutions | Loansome Doc Patrons

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

▸ **Help** - displays the 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

Activity and Status
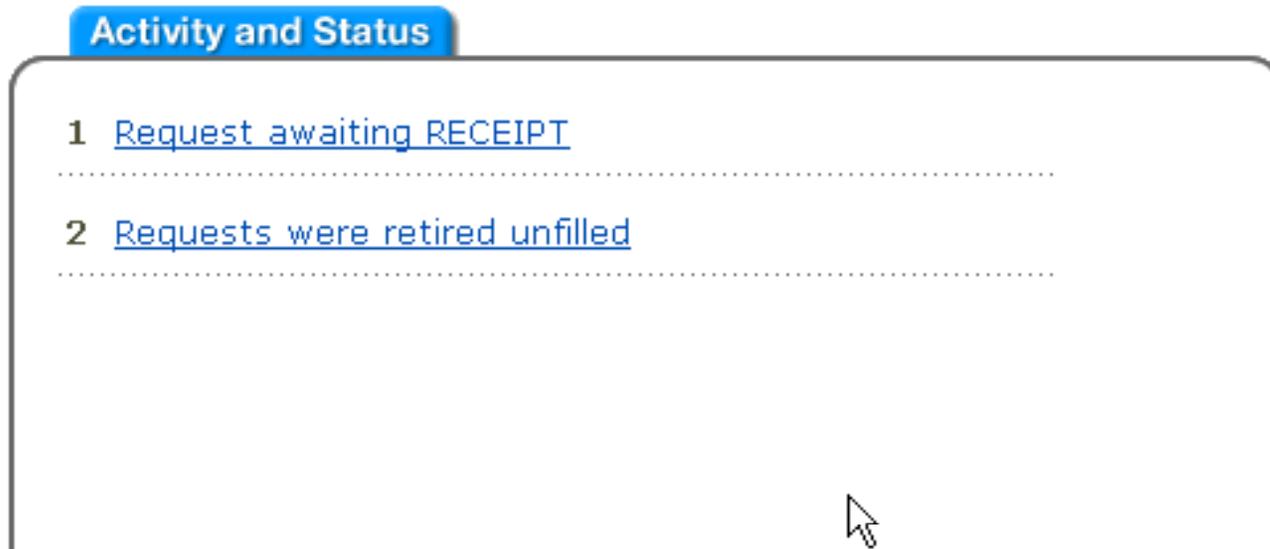
"Activity and Status" offers a snapshot of incoming requests and notices of the status of requests still in process. There are a total of fourteen possible notices that may be displayed in this section of the homepage.

Activity and Status Messages

▸ **Requests awaiting receipt**

  ▸ Select this link to "receipt" and print* new DOCLINE requests

▸ **Special handling requests awaiting receipt**

  ▸ Select this link to "receipt" and print new DOCLINE requests requiring special handling such as RUSH, Urgent Patient Care, and Color Copy requests

▸ **Requests will be removed overnight if not acted upon today**

  ▸ A warning message for requests still in process at your library. If a request is received, but not acted upon in three business days, the request will automatically route on to the next library

▸

Activity and Status Messages

▸ **Requests were removed this morning for non-action / Special Handling requests were removed this morning for non-action**

  ▸ The requests in this link have already been removed and can no longer be viewed or updated. This message will be automatically removed after one business day.

▸ **Requests were retired unfilled**

  ▸ This link shows your requests that have gone unfilled. Review the history of the request if you plan to resubmit

▸

Activity and Status Messages

▶ Requests received awaiting completion

  ▶ View DOCLINE requests received but not yet updated as filled, not filled, or transferred

▶

Before Going Any Further

▸ **DOCLINE is able to work efficiently because of two essential elements:**

▸ Routing Table

▸ Each library constructs its own routing table, which is a table of nine "cells," each with up to twenty libraries. The routing table is essentially a list of libraries from which the requester will borrow. Libraries are placed in the routing table based on their collections, cost, and services

▸ SERHOLD Record

▸ Each library reports their Serial holdings into a SERHOLD record. SERHOLD retains the titles of journals, the volumes and years held, and the physical format of each library's holdings. All bibliographic information is consistent with information created by the National Library of Medicine's Locator Plus.

Before Going Any Further

▸ When a library submits a request, DOCLINE begins to sort through the libraries in the routing table—beginning with cell 1—and identifies libraries that hold the specific title, volume and/or year, and the service (e-mail, fax, etc.) being requested. DOCLINE routes through all libraries in a cell that can provide the title, volume and/or year, and service before moving to the next higher cell.

▸ For more information on Routing Tables and SERHOLD, please consider joining the RML for the online classes "Reports, Routing Tables, and More" or "SERHOLDL: Searching, Updating, and Reporting."

▸

Borrowing

DOCLINE allows users to order literature using a variety of methods depending on the citation information available and the material being requested

Borrowing

Using the Unique Key feature from PubMed

❑ Enter one or more PMIDs in the box labeled "PMID(s)"

- ❑ Up to 11 PMIDs may be entered, each separated by a comma or a space

❑ Click "Search"

❑ Select the checkboxes to order specific returns or "Next" to order all documents

Borrowing

Using Locator Plus in Unique Key

▸ Click the drop down "Select Key" menu and select 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 appended at end of search term. For example, "cell" will retrieve titles beginning with "cell", "cellular", "cellulose", etc.)

▸ Complete the citation information as thoroughly as possible in the "Citation Information" screen

▸

Borrowing

Performing a PubMed search within the borrow function

▸ Select the PubMed feature within the "Borrow" function

▸ Perform your PubMed Search

▸ Select boxes of articles you wish to borrow

▸ Select "Order" from the "Send To" drop down menu

-Or-

▸ Select "Clipboard" from the "Send To" drop down menu to save citations across multiple searches

▸

Borrowing

▶ **Performing a PubMed Single Citation search within the borrow function**

  ▶ Select Single Citation Matcher from "PubMed Services" menu on blue navigation bar to the right of the screen

  ▶ Insert as much data into the bibliographic fields

    ▶ A year is often better than month, date, and year

    ▶ An author name is often better than title words

  ▶ Verify retrieved citation

  ▶ Select "Order" from the "Send To" drop down menu

▶

Borrowing

Searching the NLM OPAC in Borrow function

- ▸ Select LocatorPlus in the Borrow function
- ▸ You may order one title at a time from LocatorPlus
- ▸ If your search retrieves multiple results, select the title you wish to search by clicking on the title
- ▸ Click on "DOCLINE Order" button in the blue bar across the bottom of the screen
- ▸ Complete the "Citation Input" screen as completely as possible

Borrowing

Completing a Borrow

▶ Review and modify the information on "Routing Instructions" screen as necessary

▶ Edit the delivery address as needed

▶ Click "Finish" to complete the order request

Borrowing

Confirming a Borrow

▶ Once a transaction is completed successfully, the "Request Confirmation" page will display 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.

▶ Click the linked request number to view an individual request or click "Full Display" to view all of the items requested.

▶ To print the request once you have displayed the items, use your browser's print feature.

▶ Click "Return" to continue ordering from the remaining list of citations.

▶

Questions?

Exercises

▸ Please visit www.docline.gov/demo

▸ Enter Username "NUM" or "LHH"; Password "Tugger"

▸ Please order the following articles

> ▸ Just, ML. "New Roles: Professional Staff Sharing Between a Hospital and an Academic Library." Medical Reference Services Quarterly. 2003, Winter; 22 (4): 65-73. PMID: 14711050.

> ▸ Hayes, KS. "Literacy for Health Information of Adult Patients and Caregivers in a Rural Emergency Department." Clin Excell Nurse Pract. 2000. January; 4 (1): 35-40. PMID: 11858294.

▸

Exercises

- Please order the following articles
  - Verhery, MP. "Information Literacy in an Undergraduate Nursing Curriculum." Journal of Nursing Education. 1999. September, 38 (6): 252-259. PMID: 10512465.
  - An article on Information Literacy by Brown from Medical Reference Services Quarterly, 2003.
  - Three articles on Information Literacy published in the last three years.
  - Perdue, M. "A Critical Need: Libraries Can Play a Crucial Role in Helping People with Substance Abuse Problems." American Libraries. 2006. March; 37 (3): 42-43. (n.b. *American Libraries* is not indexed in PubMed)

Receiving Requests

▸ Libraries are notified in the "Activity and Status" area of the DOCLINE Home page when DOCLINE or Loansome Doc requests are awaiting receipt.

▸ Requests are only routed to libraries that indicate holding the materials and support the requested delivery methods, EFTS membership, and special services (supplying color copy, Rush, and Urgent Patient Care requests).

▸

Receiving Requests

▶ Requests are "receipted" by clicking on the link in the Activity and Status area or by navigating to the Receipt page through "Requests" in the DOCLINE menu and then selecting "Receipt"

▶ Receipting a request indicates to the system and the borrower that you have viewed and acknowledged the interlibrary loan request

▶ Print all requests that are receipted as this is the easiest way to refer to the request.

Lending

▶ 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.

Lending

Batch Lending

- 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
- In Batch Lend, the user types or scans the request number(s) to process the request

Lending

To fill a batch of requests

▶ Select "Requests" from the DOCLINE main menu

▶ Select "Lend"

▶ 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—"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.

▶ Click the **Update** button to process these requests.

▶ The **DOCLINE Requests Updated** window appears with the processed request number(s) displayed.

▶

Lending

To reject a batch of requests

▶ Select "Requests" from the DOCLINE Main Menu

▶ Select "Lend"

▶ 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

▶ In the Action field, select "Rejected"

▶ In the Reason field, select the appropriate rejection reason from the drop-down list box.

▶ Click the **Update** button to process these requests

Lending

▸ 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.

Lending

To fill a request individually:

- Select "Requests" from the DOCLINE Main Menu

- Select "Lend"

- Click the "Single" tab of the Lend window

- Select one request number per row from the "Number" drop-down list box. As each request number is selected, the values in the "Method/Reason," "Type" and "Form" columns will display the information specific to that request.

- Change the values under the Method/Reason, Type and Form columns as needed for each request.

- Click "Update" to process these requests.

Lending

To individually reject requests

▸ Select "Requests" from the DOCLINE Main Menu

▸ Select "Lend"

▸ Click the "Single" tab of the "Lend" window

▸ Select one request number per row from the Number drop-down list box

▸ Select "Rejected" from the Action drop-down list box

▸ Select the appropriate rejection reason from the Method/Reason drop-down list box

▸ Change the values under the Type and Form columns as needed for each request

▸ Click "Update" to process these request

▸

Lending

Rejection Reasons

▸ **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.

▸

Lending

Rejection Reasons

▸ **Cost:** The lender's minimum cost to supply the requested item is greater than the maximum cost authorized by the borrower.

▸ **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.

Lending

Rejection Reasons

- **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.

Lending

Rejection Reasons

▸ **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.

Questions?

Exercises

▸ Please visit www.docline.gov/demo

▸ Enter Username "NUM" or "LHH"; Password "Tugger"

▸ Receipt requests from Activity and Status box by clicking the links.

▸ Instead of printing, simply make note of each individual request number

　▸ Batch reject two requests for reasons of their lacking from your collection.

　▸ Please fill the remaining request.

▸

Serial Holdings

Searching Serials

➢ To search for institutions holding specific serials, simply enter the bibliographic data for the serial you are searching.

➢ Specify what population you would like to search. The default setting is "My Library," so you will have to uncheck that before conducting a search.

Serial Holdings

Searching Serials
➢Searching SERHOLD may be helpful if a request was retired unfilled; if you are looking to enhance a routing table; or if you are looking to prefix a request to a specific library.

Select the appropriate categories for searching. Docline will only produce returns for sets of less than 100, so if your population is too large, you may be forced back to reset limits.

Serial Holdings

Adding a Record

▸ 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.

▸ Click on the Checkbox in front of the library or libraries on the left side of your screen in order to add holdings.

▸ Change the Retention if necessary. The default is Permanently Retained.

▸ Select the appropriate Acquisition Status.

▸ Fill in Holdings Owned information.

▸

Serial Holdings

Updating or Deleting a Serial Holdings Record

▶ From the Serial Holdings Record Display, select "Update"

▶ Change holdings information as appropriate.

▶ Click the UPDATE button.

▶

Questions?