



National Library of Medicine

DOCLINE[®]

User Manual

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1 Getting Started

1.1 What is DOCLINE?

DOCLINE is the National Library of Medicine's (NLM) Interlibrary Loan (ILL) request routing system. It was developed to increase the speed and efficiency of biomedical ILL by linking the journal holdings of participant libraries and by routing the requests based on these holdings quickly throughout the [Network of the National Library of Medicine \(NNLM\)](https://nnlm.gov/) (<https://nnlm.gov/>) and beyond.

DOCLINE provides efficient lending and borrowing by finding potential lenders for ILL requests via the Routing Algorithm, which matches requests to lenders, based on their reported journal holdings. The Routing Algorithm is what makes DOCLINE ILL prompt and accurate.

Requests can be created, routed, received, and updated in this system. Requested materials cannot be transmitted through the website. DOCLINE participants can check the status of requests for which they are either the borrowing or lending library. This manual assists the user through the steps needed to accomplish Lending, Borrowing, and other user tasks.

The system is intended for reciprocal ILL among biomedical libraries in the United States and Canada. It supports resource sharing among participating libraries by enabling them to borrow from and lend to one another; it is not an article purchasing mechanism.

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 participation in DOCLINE for NNLM members. Interlibrary loan transaction charges vary by lender.

1.2 Who Can Use DOCLINE?

Libraries with a health sciences or biomedical literature collection and mission may participate in DOCLINE. Libraries willing to fulfill lending requests from other DOCLINE libraries from a minimum of 10 journals. Currently libraries located outside of the U.S. and Canada, and commercial document delivery vendors are not eligible for DOCLINE membership.

Libraries not eligible for DOCLINE that wish to request ILL from the National Library of Medicine should see [NLM's ILL home page](https://www.nlm.nih.gov/psd/cas/illhome.html) (<https://www.nlm.nih.gov/psd/cas/illhome.html>) for more information.

If you have any questions about DOCLINE participation, contact [DOCLINE Support](#).

1.3 Recommended Library Best Practices

To ensure best results when using DOCLINE, we recommend the following:

- Configure Lend Alerts (See pg. 45) to ensure timely [Receipt and Update](#) of Requests (<https://www.nlm.nih.gov/docline/support/TTA.html>).
- Use Library Schedule and Out of Office dates to reflect Library's availability.
- Lend to other DOCLINE libraries.
- Follow copyright law and/or guidelines as appropriate.
- Annually review and update your Library Profile and Routing Tables.
- Annually review and update your Journal Holdings Records.
- Notify your Regional Medical Library (<https://support.nlm.nih.gov/knowledgebase/article/KA-04867/en-us>) of any changes to your library's participation in DOCLINE.
- Subscribe to NLM's [DOCLINE email updates](#) to get news from NLM about the system.

Libraries may also:

- Contact DOCLINE [Technical Support](#) (<https://support.nlm.nih.gov/support/create-case/>) to report issues
- Submit new (within scope) [journal titles](#) (<https://simpleform.nlm.nih.gov/doclinejournals/>) to NLM for inclusion in DOCLINE
- Submit [feedback or suggestions](#) (<https://support.nlm.nih.gov/support/create-case/>) to DOCLINE

1.4 How to join DOCLINE (New Library)

Once you have determined that your library is appropriate for DOCLINE and that you can follow recommended best practices:

1. Use the **Apply Now** button on the [DOCLINE home page](#) and supply information about your library. (https://docline.gov/docline/needs_authentication/?next=/docline/)
2. Once your account request has been verified, DOCLINE Support will work with you to establish a basic DOCLINE Library Profile and set up DOCLINE user account(s) for your institution.
3. Each individual user must have a Google account (or other account type) to sign into the system.
(See [1.7](#) for more information).
4. Libraries should ideally expect to begin active lending and borrowing within three (3) months of account set up.

To do so, participants:

- Complete their Library Profile

- Establish Borrowing preferences, including Routing Tables
- Configure Lending Options, including schedule and service offerings
- Create at least ten (10) DOCLINE Journal holdings records

Once established, libraries are encouraged to follow DOCLINE Best Practices (see [1.3](#)).

1.5 Library Records & LIBIDs

Every DOCLINE library has a LIBID. A LIBID is a unique library Identifier that is assigned to all libraries that use DOCLINE or borrow from NLM. The LIBID consists of six alphabetic characters.

For U.S. and Canadian institutions, the first two characters of a LIBID are the Geographical Code (U.S. state or Canadian province abbreviation) and are followed by a "U" for U.S. or a "C" for Canada, and then three alphabetic characters (originally from the institution's former Serial Holdings code).

The LIBID for other countries consists of the first two letters of the Universal Postal Union (UPU) code, followed by the letter X and three alphabetic characters.

- MDUNLM: Maryland, US
- PAUTEM: Pennsylvania, US
- NSCRQW: Nova Scotia, Canada
- ONCCIS: Ontario, Canada
- FRXTLC: France
- AUXFSD: Australia

The EFTS system creates similar library IDs with "E" as the third character for libraries that use EFTS, but do not use DOCLINE.

1.6 User Account information

NLM recommends that each user have their own individual DOCLINE user account for logging in, to maximize security and accountability, rather than a single shared account for the library. All user accounts linked to a library have the same access and can view the results of others' actions.

NOTE:

- Each user must have two accounts to log in: an externally-issued, externally-verified account plus a matching DOCLINE user account. These accounts work in conjunction with each other for login.
- Password maintenance is part of a user's externally-issued, externally-verified account and not managed within DOCLINE.

External Accounts

Google, Research Organization (for NIH-affiliated research bodies) or federal CAC or PIV cards may be used to verify identity and sign into DOCLINE. [Google accounts based on existing work email addresses \(https://support.google.com/accounts/answer/27441?hl=en#existingemail\)](https://support.google.com/accounts/answer/27441?hl=en#existingemail) are suggested, although users may choose to use a new or existing Gmail account if preferred. (See [1.8](#) Login Methods for more information).

Requesting Accounts

Additional user accounts may be requested if needed, using the **Apply Now** button on the DOCLINE login screen. *The email address provided in the application must be the one that will be assigned as the DOCLINE username.* Every account application is verified with the associated library before the user account is issued.

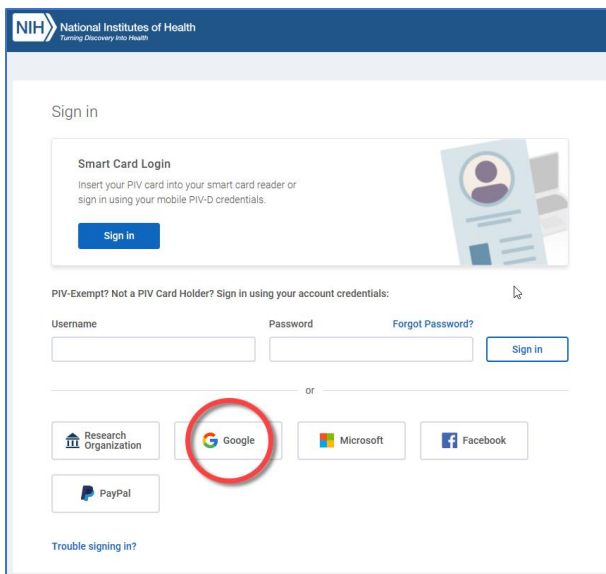
If multiple user accounts are required at one time, please contact DOCLINE Support so that all accounts can be verified at once.

User accounts should be secured to prevent unauthorized access to DOCLINE.

1.7 Login

When you log in to DOCLINE, the method you choose determines who verifies or authenticates your identity. There are several options displayed to users on the “NIH Sign In” portal which displays after clicking the **Log in to DOCLINE** button (<https://DOCLINE.gov>).

Figure 1-NIH Sign In



Users verify their identity via the portal before they are returned to DOCLINE. Google accounts are used by nearly 90% of DOCLINE libraries.

NOTE: After the first successful sign in, users cannot change to a different verification method.

The Sign In portal is supported by the National Institutes of Health Computer and Information Technology (NIH CIT) division. The password and help links on the NIH Sign In portal are NOT recommended resources for DOCLINE libraries.

1.8 Login Methods

When you log in to DOCLINE, the method you use determines the entity that verifies or authenticates your identity. There are several options displayed to users on the NIH Sign In portal* after you click the **Log in to DOCLINE** button (<https://DOCLINE.gov>).

NOTE: After the first successful sign in, users cannot change to a different verification method.

Supported methods

If a method is supported, NLM tests it with releases and provides help on its use.

- **Google:** log in with your own Google account and password or your own Gmail account and password (email address) that matches established DOCLINE username. This is the most used method. See NLM's [Google Best Practices](#) for more information.
- **Research Organization:** log in with your own university or other workplace network credentials (email address) that matches established DOCLINE username. Institution must be an NIH federated research partner and belong to Incommon.org to be listed.
- **Login.gov** is listed as a *Research Organization* option on the NIH Sign In portal. See [Login.gov's Help](#) for more information.
- **Federal Libraries:** log in with your CAC or PIV card that matches established DOCLINE username. NIH staff have the option to use internal network credentials (username and password).

Unsupported methods

Unsupported methods may work but have not been tested, could have unpredictable results, and are not recommended. The unsupported options are Microsoft and PayPal.

Additional Accounts for Alternative Login Methods

An authorized user can maintain a secondary login for use when they are at an alternative worksite or when primary authentication method is unavailable. Both logins provide identical access to the user's library and request activities. Contact [DOCLINE Support](#) to request a secondary account.

*The National Institutes of Health account and identity management team maintains and supports the NIH Sign In portal.

1.9 Logging in Steps

Follow the steps below, or see [DOCLINE Login Instructions, \(https://www.nlm.nih.gov/doctype/login.html\)](https://www.nlm.nih.gov/doctype/login.html) if you prefer instructions with screenshots.

STEPS

1. If you or your user account is new, recheck your login method (ex: [Google \(https://www.google.com/\)](https://www.google.com/), Research Institution), by verifying that you can use it successfully to login outside DOCLINE before attempting to sign into the DOCLINE system.
2. Go to the [DOCLINE login page \(https://docline.gov\)](https://docline.gov).
3. Select **Log in to DOCLINE** button
4. On the NIH Sign in screen select the **Google** button in the bottom section
-OR- the appropriate sign in button or link for your login method.
5. On the subsequent Google Account sign in pages, enter the email address and password associated with your Google Account, or follow your normal sign in prompts for other sign in methods.
6. Click **NEXT**.

If successful, you will see the **Activity & Status** area for your library.

If login fails, please follow the suggested [troubleshooting steps](#) and [Google account management tips](#) before contacting DOCLINE Support. (<https://support.nlm.nih.gov/knowledgebase/article/KA-05201/en-us> and https://www.nlm.nih.gov/doctype/support/pdfs/best_practices_google.pdf)

NOTE: *Passwords cannot be reset within DOCLINE or by DOCLINE support staff.*

If you have forgotten your password, refer to the password recovery section of the [Google account management PDF \(https://www.nlm.nih.gov/doctype/support/pdfs/best_practices_google.pdf\)](#).

1.10 DOCLINE: System Requirements

The minimum system requirements for DOCLINE are:

- A stable high-speed Internet connection
- Windows 8 or later
- Web browser application: Edge, Chrome or Firefox are preferred
- DOCLINE requires cookies
- The DOCLINE website design is responsive, and most features should work on any internet-connected device, regardless of operating system or browser. DOCLINE is not tested with, nor supported for use with, browsers or operating systems not listed above. Internet Explorer 11.x may

be used; however, it has reached Microsoft support end of life and some features of DOCLINE 6.x may no longer work as expected

Cookies

When you visit any web site, it may place a small text file, known as a "cookie" on your computer. The cookie allows the web site to "remember" specific information about your visit while you are connected or when you return to that site. The Office of Management and Budget Memo M-10-22, [Guidance for Online Use of Web Measurement and Customization Technologies](#), 6/25/10, (<https://digital.gov/resources/m-10-22-guidance-for-online-use-of-web-measurement-and-customization-technologies/>) allows Federal agencies to use session and persistent cookies.

The cookie makes it easier for you to use the dynamic features of Web pages. Cookies from NLM Web pages only collect information about your browser's visit to the site; they do not collect personal information about you. While visiting certain NLM sites, you may occasionally encounter a Web page that automatically employs cookies to make it easier to use the dynamic features of these Web pages.

For more information on how NLM uses cookies, refer to the [NLM Privacy Policy](#) (<https://www.nlm.nih.gov/privacy.html>).

Mac OS

NLM does not support Apple devices for use with 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 technical support for existing Macs in the network.

Configuring my browser

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

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

Barcodes on DOCLINE Requests

Barcodes appear in the top left corner of request receipts directly above the 8-digit DOCLINE request number. Barcodes speed request processing for those with barcode scanners. To check to see if your browser is correctly displaying barcodes, view the [Barcode Font Test](https://www.nlm.nih.gov/docline/font_header.html) page (https://www.nlm.nih.gov/docline/font_header.html).

2 Getting Help

2.1 Documentation

User Manual

This manual contains the most complete user documentation for DOCLINE. You can navigate through the document using the hyperlinked table of contents for navigation or PDF bookmarks.

The DOCLINE website layout is mirrored in this document. After the overview and introductory content, main menu items are presented in this manual as laid out, from left to right, with sub-menu elements and page level elements presented in the order in which they appear on the screen.

Other Resources, Videos, Webinars

The [DOCLINE Resources](https://www.nlm.nih.gov/docline/newdocline.html) (<https://www.nlm.nih.gov/docline/newdocline.html>) page includes short 'how to' videos, webinar recordings and Medical Library Association annual meeting presentations.

Frequently Asked Questions (FAQs)

Articles in the NLM Support Center knowledgebase answer the [most commonly asked questions](https://support.nlm.nih.gov/search/?logicalNames=&q=docline) (<https://support.nlm.nih.gov/search/?logicalNames=&q=docline>) about DOCLINE.

2.2 Getting assistance

Report a problem using DOCLINE

Regional User Help: If you need assistance logging in, or using any system features, please contact the [DOCLINE Coordinator at your RML](#).

NLM DOCLINE Support: If you are seeing errors when trying to complete a task, or aspects of the system that are not functioning as expected, contact [NLM by submitting a Help Desk ticket](#). Please provide as much detail as possible regarding your question or issue, including screenshots, error messages, steps taken, and status. To speed response to your inquiries, be sure to mention DOCLINE and include your LIBID.

There are two ways to contact DOCLINE Support at NLM:

- **Web form:** Use NLM's Write to the Help Desk form. From within DOCLINE, select [Need Help?](#) (<https://support.nlm.nih.gov/support/create-case/>) at the top right of every page. The help desk form is also available outside of DOCLINE.
- **Email:** custserv@nlm.nih.gov

NOTE: If you have technical issues when using third-party ILL software such as CLIO, ILLiad, QuickDOC, etc. but no problem when using the DOCLINE website directly with a web browser, please refer to the user documentation or customer service for the third-party software.

Contact NLM ILL Unit about a DOCLINE Request Filled or Rejected by NLM

There are three options to connect with NLM ILL staff:

- **DOCLINE's Contact Library feature.** Prepopulates email with request number and Library information. (See section 7.4 for more information).
- **Web form:** customer Support form (<https://support.nlm.nih.gov/support/create-case/>)
- **Email:** custserv@nlm.nih.gov

Include your LIBID and NLM REG number if known, as well as DOCLINE request number. Include specifics of issue and desired resolution if applicable.

3 Getting News

3.1 DOCLINE-L Email Discussion List

The [DOCLINE-L](#) email discussion list provided by NIH serves as a forum for DOCLINE users to communicate with each other about any issue related to DOCLINE or resource sharing among the greater biomedical library community.

The list is unmoderated; however, postings are limited to list subscribers. Information about subscribing, participating, and unsubscribing is posted here. https://www.nlm.nih.gov/docline/newdocline_l.html
DOCLINE users are also encouraged to subscribe to discussion lists for their own RML as well.

3.2 Regional RML and other NNLM blogs

Each region of The Network of the National Library of Medicine offers its own email blog or newsletter. Check your [regional web page](#) (<https://nnlm.gov/about/regions>) for more information.

4 System Overview

DOCLINE provides users the ability to request copies or loans of biomedical literature from other libraries. Borrow requests can be initiated in multiple ways, depending on what information is available about the desired item or article. Borrowers' requests are routed to a selection of potential lenders determined by Borrower Defaults as well as availability of the requested material.

The DOCLINE Routing Algorithm matches borrowers' requests to active libraries that report holding the correct volume or year of the desired journal, as well as matching in other respects. Lenders receipt requests and either update them as Filled, or reject them with appropriate reject reasons such as Not on Shelf (NOS), Not Yet Received (NYR), License (LIC), etc. (See [5.10](#) for a list of reject reasons).

DOCLINE is fast and accurate for article requests because participant libraries add their journal holdings to the system, which enables the Routing Algorithm to match requests to lenders. Participants' monographic holdings are not in DOCLINE, so no automated routing is possible for book or chapter requests.

4.1 Main Menu

The DOCLINE navigation bar or main menu has the five menu tabs: Lend, Borrow, Libraries, Journals and Reports. Select a tab to display its submenu items. Many tasks can be initiated from the menu as well as from hyperlinks throughout DOCLINE. These menu options are each covered later in this manual. Tabs and submenu items will only display if user has rights to those functions.

| Lend | Borrow | Libraries | Journals | Reports | Admin** |
|---|--|--|----------------------------------|--|---------|
| •Receipt Requests •Update Requests •Search Requests | •Place Requests-PMIDs •Place Request-Journal ID •Place Requests-Manual •Search Requests | •Manage Library •Search Libraries •Switch Library* | •My Journals •Search Journals | •Request Reports •Holdings Reports •EFTS Report* | |

* These features shown only for libraries to whom it applies.

** Admin only shown to those with elevated permissions.

4.2 DOCLINE Home Page

The DOCLINE home page is the first page that displays after signing into DOCLINE. The central "Activity & Status" area displays the LIBID for the current session and DOCLINE request status or notices. Users linked to more than one Library see a "Switch Library" option displayed next to their LIBID.

You will find the following options available in the header and footer of every DOCLINE page:

- **Need Help?:** displays Support Center DOCLINE FAQs
- **Contact Help:** opens NLM's customer service form

Many of the most frequent DOCLINE tasks are immediately available on the home page:

- **Got PMIDs? Get articles!:** starts a new PMID request
- **Search Lend Requests:** generates a pre-filtered search
- **Search Borrow Requests:** generates a pre-filtered search

Clicking Search without any other input quickly leads lenders and borrowers to their most recent requests.

4.3 Activity & Status Cards

In the **Activity & Status** area of the DOCLINE Home Page, you will see cards headed "MY LENDING" and "MY BORROWING". The cards display the status of DOCLINE Lend Requests your library is processing for others or the status or activity of Borrow Requests you have placed.

Removal Warnings do not appear in the Activity & Status Area. Instead, these warnings of removal by Time-Triggered Actions appear for both the borrower and lender in Request Search results. (See 5.11 for more information on warnings).

NOTE: the DOCLINE system layout throughout follows the Lend – Borrow sequence of the main menu. This means that Lending elements or actions will always display on the left and Borrow elements or actions will always display on the right, for instance in the Activity & Status area cards, and in Activity Summary reports.

My Lending

MY LENDING home page links result in pages where the lender takes action on requests (Receipt or Update requests).

To Receipt (requests awaiting lender receipt or 'acceptance')

- Click on the appropriate row to receipt and print new DOCLINE requests routed to your library to fill for others.
- Special Handling requests appear in their own row. Special Handling requests have two different Service Levels: Rush and Urgent Patient Care.

To Update (received requests awaiting completion.)

- Clicking an Update row opens Lend Update so that requests can be updated as Filled, or Rejected with an appropriate reject reason (See for 5.10 for more on Reject Reasons).

My Borrowing

MY BORROWING home page links result in a display of pre-filtered search results

Open Requests

- requests awaiting lender receipt or update.

Retired Requests (last 7 days)

- Completed requests, Not Filled and Filled. Click through links to view your requests that you may need to follow up on. For unfilled requests that you plan to resubmit, be sure to view the history of the request so that you can determine what changes to make to the Routing Instructions to improve chances it will be filled the second time it is submitted.

5 Lend

5.1 Lending Overview

As requests route to each lending library to be filled for other DOCLINE libraries, lenders receipt requests, determine whether they can fill them from their collection, and then return to DOCLINE to Update requests as Filled or Rejected. High fill rates and low turnaround time are the hallmarks of a good lender.

Requests must be receipted and updated in a timely manner or else they will be automatically routed away from the potential lender by Time-Triggered Actions (See [5.5](#) for more information).

- **Normal** service level requests must be receipted within one business day of routing to the lender
- **Rush** and **Urgent Patient Care** Requests must be receipted the same day they route to the lender

For the most efficient lending that minimizes rejected or unreceipted requests:

1. Maintain up to date Journal Holdings in DOCLINE to prevent getting requests for journal titles, formats, or years that you no longer own
2. Use the Lend Alert feature that notifies you with an email when a request routes to your library to be filled for another library. Libraries can choose which notification emails to receive. (See [pg. 44](#) for more information).
3. Maintain an up-to-date Library Schedule in your Library Profile
4. Libraries that are mid- to high-volume lenders are encouraged to login daily to receipt and process Lend Requests, if lend alerts are not practical for their processes.

Lender performance statistics display as part of the public Library Profile, under Lend Information, and are part of the Monthly Activity Summaries. Lending Fill Rates around 70% are considered average. Some libraries may achieve 85% or higher, particularly those with dedicated ILL staff.

5.2 Service Levels Offered

Service Levels determine how quickly a request should be filled, governing the amount of time a lender is given to Receipt and subsequently Update a request as Filled or Not Filled. If a lender doesn't take action within the appropriate timeframe, DOCLINE's Time-Triggered Actions will remove the request, and then either re-route it to the next potential lender or retire it Unfilled.

- **Normal:** Standard ILL service
 - Request will reroute if not receipted within 1 business day. Receipted request will route away if not Updated within 3 business days.
- **Rush:** Same day delivery
 - Request will reroute at midnight if not receipted the same business day. Receipted request will route away if not Updated within 1 business day.
- **Urgent Patient Care:** Process and ship immediately
 - Lenders should check for Urgent requests at least every 2 hours or turn on Lend Alerts. Request will reroute at midnight if not receipted the same business day. Receipted request will route away if not Updated within 1 business day.

5.3 Receipting Lend Requests

Libraries are notified that requests are awaiting Receipt or Update in the MY LENDING Activity & Status card on the homepage or by Lend Alert emails (45). Receipting or accepting incoming new request(s) changes their status to "Received" in the system and starts the clock ticking for "Days to Process (filled) or (not filled)" (turnaround time).

Libraries can view a request without receipting within Lend>Receipt or Lend>Search. In search results, the requests that have not been receipted will show "New" as the **Latest Action** on the card for the request.

NLM encourages the timely receipt of requests. Doing so provides a more accurate picture of request status, which benefits both borrowers and lenders. Timely receipting also prevents unnecessary rerouting of requests via [Time-Triggered Actions](https://www.nlm.nih.gov/docline/support/TTA.html) (<https://www.nlm.nih.gov/docline/support/TTA.html>).

NOTE: Requests must be receipted before they can be updated as Filled or Rejected.

STEPS

1. Choose **Receipt Requests** from the **Lend** menu

-OR-

In the **MY LENDING** card beneath Activity & Status on the homepage, click through the link(s) under **To Receipt**

Bar-coded Request Receipt(s) display(s)

2. Select Print Requests (optional)
3. Select **Mark All as Received and Return To DOCLINE** (required)

Reprinting Lend Requests

Lenders can print or reprint request receipts or 'pick slips' from the homepage or Lend menu.

STEPS

1. Type or paste the request number, patron name, or delivery email into homepage **Search Lend Requests** box and click **Search**
-OR-
Choose **Search Requests** from the **Lend** menu, type, or paste in the request number, patron name, or delivery email, select appropriate dates or filters, and click **Search**.
2. Select request(s) to be printed using the checkboxes on the individual request cards, or the **Select All** button in the **Actions for Selected Requests** panel beneath the Filters on the left.
3. Click the **Print Selected** button and follow your computer's print prompts

5.4 Updating Lend Requests

After receipting and processing a request, lenders must Update the request status to Filled or reject the request with an appropriate Reject Reason (See [Request Rejection Reasons](#) for more information).

Up to ten requests can be updated at one time. Lenders are returned to the Update screen after each update.

Filling Lend Requests

STEPS

1. Choose **Update Requests** from the Lend menu. Requests must first be receipted before they can be updated as Filled or Rejected. (See [5.3](#) for more on Receipt).
-OR-
In the **MY LENDING** card beneath Activity & Status on the homepage, click through the link(s) under **To Update**
Available Requests display on cards and are listed beneath the Request Numbers input box.
2. Select requests for update by choosing button(s) above the cards, checkboxes on individual requests shown, by copying and pasting request numbers or scanning in from barcodes. Individual request numbers must be separated with a space, a comma, or a carriage return.
3. If Filled as Requested by Borrower (sent by Borrower's primary delivery method) select **Filled as Requested by Borrower** radio button

-OR-

Select **Filled Via** and choose actual delivery method from the pull-down menu, then select **Update Requests** button at bottom left.

Success message with request numbers and update details displays, or users are prompted to make a choice (Fill or Reject) to enable successful update.

Rejecting Lend Requests

Lenders may choose from a variety of reject reasons. (See [5.10](#) for more information). There are three reasons that prevent a request from routing on to other lenders, including COP, indicating lack of copyright compliance. While the burden of compliance falls to the borrower and every DOCLINE request includes a statement of copyright compliance, lenders may reject requests for COP if they determine that requested items by a single borrower constitute nearly a whole journal issue or entire monograph.

Choose the reject reason which mostly closed describes why your library is unable to fulfill the request.

STEPS

1. Choose **Update Requests** from the Lend menu. Requests must first be receipted before they can be updated as Filled or Rejected. (See [5.3](#) for more on Receipt).

-OR-

In the **MY LENDING** card beneath Activity & Status on the homepage, click through the link(s) under **To Update**

Available Requests display on cards and are listed beneath the Request Numbers input box.

2. Select requests for update by choosing button(s) above the cards, checkboxes on individual requests shown, by copying and pasting request numbers or scanning in from barcodes. Individual request numbers must be separated with a space, a comma, or a carriage return.
3. Select **Rejected Because**.
4. Choose Reject reason from the pull-down menu, then select **Update Requests** button.

Success message with request numbers and update details displays, or users are prompted to make a choice to enable successful update.

5.5 Lender Inaction and Time-Triggered Actions

Several Time-Triggered Actions (TTA) occur automatically in DOCLINE, based on the request's service level (Normal, Rush, Urgent Patient Care), the length of time an ILL request is in the system, and the actions that have been taken on it.

For Normal Requests

- An ILL request must be receipted by the lending library to which it routed within one (1) business day.
- If a request remains not receipted on the day following its routing to the lender, at 12:05 AM on the next business day, DOCLINE removes the request and routes it to another potential lender.
- On the second working day after an ILL request is receipted, DOCLINE displays a *warning message* in Lend and Borrow Request Search results that there is one more day to update a request.
- If an ILL request is receipted but not acted upon (updated as filled or rejected) within three (3) working days, DOCLINE automatically re-routes the request to another potential lender.

For Rush and Urgent Patient Care Requests

- A **Rush** (same day delivery) or **Urgent Patient Care** (process and ship immediately) request must be receipted by the lending library on the same day the request routes to the potential lender.
- If a request is not receipted on the same day it routes to the lender, DOCLINE removes the request 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 displays a *warning message* in Lend and Borrow Request Search results that there is one more day to update a request.
- If a request is receipted but not acted upon (updated as filled or rejected) within one (1) business day, DOCLINE automatically re-routes the request to another potential lender at 12:05 AM the following morning.

NOTE: Weekends are not counted in the calculation of days. Only Monday - Friday count as business days, excluding the holidays listed in TTA Schedule, below.

Time-Triggered Actions (TTA) Schedule

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

Time-Triggered Actions **do not run** on the following U.S. national holidays*:

- New Year's Day - January 1
- Memorial Day - Last Monday in May
- Juneteenth National Independence Day - June 19
- Independence Day - July 4
- Labor Day - First Monday in September
- Thanksgiving Day - Fourth Thursday in November

- Christmas Day - December 25

Time-Triggered Actions **do run** on the following U.S. federal holidays because many libraries are open:

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

NOTE: If the holiday falls on Sunday, it is usually observed on Monday. If the holiday falls on Saturday, it is usually observed on Friday.

5.6 Pause or temporarily deactivate Lending

When there is no staff available to fill lend requests due to vacations or similar outages, libraries can set themselves "Out of Office" in DOCLINE, which makes them *Temporarily Inactive* for lending, and prevents requests from routing to them.

The library will be deactivated immediately if the outage **Start Date** is today. If the Start Date is in the future, on that date (at 12:05 am) [Time-Triggered Actions](#) will automatically change the library's status to "**Temporarily Inactive.**" (<https://www.nlm.nih.gov/docline/support/TTA.html>)

STEPS

1. In the main menu, select **Libraries**
2. Select **Manage library**
3. Scroll down to **Library Schedule**
4. Click the hyperlinked words **Library Schedule**
5. Click **Edit**
6. Click cursor in **Start Date** to display calendar widget or type dates (MM/DD/YYYY)
7. Input start and end dates for time periods when requests should not route to your library. For additional blank "Out of Office" date ranges, complete displayed date ranges and click **Update Library**, then click **Edit** again. Additional ranges will display.
8. Click **Update Library** to save changes

At the end of the last active day, please receipt any new requests and update all pending requests as 'Not Filled' so they will immediately route on to the next potential lender.

Out of Office date ranges in the past should be manually deleted.

5.7 Lend Information (Preferences)

The **Lend Information** in your Library Profile is used by the system to determine which requests to route to you, and by other DOCLINE users to evaluate your library as a potential lender.

The Manage Library section of the manual includes details about setting your Lending defaults. (See section [7.1](#) for more information)

5.8 Lend Search

Lend Search is available directly on the homepage and from the Lend menu. Only requests that are Filled, Received, or Pending Receipt by the Lender may be viewed in Lend Search. Clicking **Search** without any other input will return all available results from the prior 150.

New requests which have been cancelled by the Borrower prior to Lender receipt, or requests which have been automatically routed away by Time-Triggered Actions (TTA) due to lender inaction cannot be retrieved in Lend Search.

WARNINGS for impending TTA-removal of lend requests due to your library's inaction with them display **ONLY** in Request Search Results.

Request search results display in a card for each individual request found. The lender and borrower view of Request cards differs.

Lend request cards show:

- Request number,
 - hyperlink displays request receipt in a new window
- Citation summary
 - e.g. Clin Ther 2000 Dec;22(12):1433-42
- Borrowing Institution name and LIBID
- Via:
 - How request was matched or routed to lender
- Request Date:
 - Date and time request originally placed by the borrower
- Latest Action:
 - The present state of the request. If "Filled" actual delivery method also displays
- Latest Action Date
 - Date and time of last or final action applied to request.

Lend Request Search Terms and Filters

Requests can be retrieved with these search terms:

- Request Number(s)

- Patron Name
- Delivery Email

And further limited by:

- Date (Latest Action Date)
- Request Status
 - Pending Receipt or Update
 - Filled
 - Warning
 - Any
- Service Level
 - Rush
 - Urgent Patient Care

Sort options are available in the bottom of the Filters panel. By default, Request search results are in date order, with the oldest first. Other Sort options are:

- Requests – Newest
- Lending Library – LIBID
- Patron Name
- Journal Title

These values are displayed on request receipts on the **Last Route** row labeled “Via” as well as in the **Show History** view in Borrow Search.

These routing reasons explain how the Borrower and System selected the Lender.

Table 1 - Routing Reasons

| | |
|----------------------------|---|
| Direct to Library | Borrower chose to Route Directly to Library , sending request to an individual library before all other possible lenders. <i>(referred to 'prefixing' in earlier DOCLINE versions)</i> |
| Cells 1-9 | The request routed to lender based upon its cell position (1-9) in the borrower's Automated Routing Table. |
| NLM | Request routed to NLM based on borrower's Routing Instructions. Requests route to NLM when route to NLM is selected. |
| All Other libraries | The All Other Libraries 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 . |

| | |
|---------------|--|
| Manual | The request routed to this lender based on the borrower's monograph, audiovisual, non-NLM (M/A/N) Manual routing table values. |
|---------------|--|

5.9 Request Removal Reasons

In Show Request History, **Removal Reasons** explain why the request was removed from one lender and re-routed to a different lender by TTA.

Table 2 - Removal Reasons

| | |
|---|---|
| RCP - Removed for Non-Receipt (TTA) | DOCLINE's Time-Triggered Actions rerouted the request because the lender did not Receipt the request the same day it routed to them (Rush, Urgent Patient Care), or within one business day of routing (Normal). |
| ACT – Removed because Not acted upon (TTA) | DOCLINE's Time-Triggered Actions routed the request to a new lender 3 days after receipt (normal service level) or the same day received (Rush or Urgent Patient Care), because the lender did not take action (update as filled or rejected) after receipting the request. |

5.10 Request Rejection Reasons

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

Reject reasons marked with an asterisk – Copyright, Cost and Incomplete – are 'kill codes' that prevent requests from routing onward to other lenders, who would likely reject the request for the same reason.

- **Copyright:** All requests must include a **copyright** compliance statement but also must not exceed copyright guidelines for how much of a work can be copied, etc. Routing ends.
- **Cost:** DOCLINE Routing tables built according to recommended practices will have higher cost lenders in higher numbered cells; it is therefore unlikely that the request will route onward to less expensive lenders. Routing ends.
- **Incomplete:** Either there is missing information which prevents the request from being completed or the information provided is inaccurate. Routing ends.

Table 3 - Reject Reasons

| Code | Rejection Reason | Description |
|------------|-------------------|---|
| BDY | Bindery | The lender holds the journal requested, but it is currently at the bindery and unavailable for loan or copying. |
| CAN | Cancelled | The request was cancelled by the lender at the borrower's request. |
| POR | Condition | The material is held, but the physical condition of the volume or issue prohibits lending or copying. |
| EXL | Copy limit | The number of pages requested exceeds the copy limit imposed by this institution. |

| | | |
|------------|----------------------------|--|
| COP | Copyright* | The lender has determined that this request is in violation of copyright compliance. Prevents a request from routing to other lenders. |
| CST | Cost* | The lender's minimum cost to supply the requested item is greater than the maximum cost authorized by the borrower. Prevents a request from routing to other lenders. |
| PRO | In Process | The material has been received but is not yet ready for use. |
| USE | In Use | The lender reports the volume/issue was in use and unavailable for loan or copy at the time of the request. |
| INC | Incomplete* | The lender believes that the citation on the request is either incomplete or incorrect. Prevents a request from routing to other lenders. |
| LAC | Lacking | The lender has the journal title but is missing the requested issue or volume. |
| LIC | License Restriction | The lender's journal subscription prohibits ILL under the conditions specific to this request. For example, article is within embargo period, or subscription prohibits ILL from the online journal to libraries outside the lender's country. |
| LOS | Lost | The lender declares this title or volume/issue is lost or withdrawn from its collection. |
| NCR | Non-circ | The lender owns this item but reports that it is not available for loan. |
| NYR | Not yet received | The title is owned, but lender reports volume/issue has not yet been received. |
| NOS | Not on shelf | The lender owns this title but reports that it was not on the shelf at the time the request was received. |
| ORD | On order | The item has been ordered but has not been received by the library. |
| OTH | Other | Request was rejected for a reason other than those listed. Please check with lender. |
| NOT | Title not owned | The requested title is not owned by the lending library. |

5.11 Warnings for Lender Inactivity

Both Lenders and Borrowers are warned of potential automatic re-routing by Time-Triggered Actions. Warnings display on search results cards in Lend and Borrow Search.

NORMAL Service Level

Receipt

- Request must be receipted by the lending library to which it routed within one (1) business day.
- If a request is NOT receipted by the lender on the second working day after it routed to a lender, a WARNING displays in Search results.

! Will reroute tonight if not receipted

Updating

- Request must be *updated* by the lender after receipt within *three (3) business days*.
- On the second working day after an ILL request IS receipted, DOCLINE displays a *warning message* that there is one more day to update a request.

! Will reroute in one more day if not updated

the next day it says

! Will reroute tonight if not receipted

RUSH or **Urgent Patient Care** Service Level:

Receipt

- No warning, same day receipt required.

Updating

- On the day after a Rush or Urgent Patient Care request is receipted, DOCLINE displays a warning message that there is one more day to update a request.

! Will reroute in one more day if not updated

6 Borrow

6.1 Requesting Overview

Each time you create a Borrow Request, DOCLINE pre-fills in the request with your library's Borrowing Defaults or preferences. These are configured in your Library Profile (see [7.1](#) for more information). Default values can be modified when creating a request. Borrowing defaults play an important role in which Lenders will be selected to fill your requests.

There are three (3) different ways to start a Borrow request depending on how much is known about the desired item. Each request form is pre-filled in with the borrower's default choices for cost, delivery, routing, etc. drawn from their Library Profile Borrow Defaults. (See page [40](#) for more information).

The details of the requested material *may* also be automatically filled in, depending on how the request is initiated.

While most DOCLINE requests are for articles, the Manual order method may be used to request loans of books or copies of book chapters.

Place request – PMIDs

This is the top option in the Borrow menu and is the most frequently used request initiation method.

Using a PMID (a PubMed indexed article's unique PubMed identifier) is the most efficient method of requesting for both Borrowers and Lenders. User inputs up to five (5) PMIDS and the resulting request is fully populated with journal and article information. Routes automatically.

Place request – Journal IDs

User inputs a Journal Unique ID number (UI), for example NLM UI, ISSN or OCLC number, and the request is filled in with journal information. The user completes request by adding citation (article details). Routes automatically.

NOTE: may also be initiated from Journals Search with journal title.

Place request – Manual

For ordering books, chapters or articles from Journals not listed in DOCLINE or NLM's LocatorPlus catalog. User inputs all details about desired material (article, book, book chapter). Routes on Manual Routing table.

Requests begun with a PMID or Journal ID have enough detailed journal information that the DOCLINE Routing Algorithm can select potential lenders from the Borrower's Automated Routing Table by matching to Lenders' reported DOCLINE Journal Holdings. Manual requests route only to the 9 libraries in the Borrower's Manual Routing Table because without any Journal UIs, the system cannot match the request to holdings and libraries do not report monograph (book) holdings in DOCLINE.

Requesting Journals Not Found in LocatorPlus NLM's Catalog

When the desired journal does not have a bibliographic record in LocatorPlus, borrowers cannot use Journal UI ordering or PMID ordering, and must use the manual request method (See [6.5](#) for more information). Without a bibliographic record, no holdings can be recorded, so automated holdings-based routing is not possible.

Requesting Books or other physical items

The only way to place non-article requests is to use the manual request method. (See [6.5](#) for more information). Development plans include ordering books by unique identifier in a future release.

DOCLINE only includes journal holdings so automated holdings-based routing is not possible for books or A/V requests.

6.2 Understanding the “Place Order” page

The routing algorithm uses the information on the **Place Order** page to determine where your requests will route. The Place Order page differs depending on the way the request is begun. Many of the values filled in are taken from the Borrow defaults set in your Library Profile. Information displayed can be modified on a request-by-request basis as needed.

Citation Information

The **Citation Information** portion of the request form is fully complete and not editable for requests begun with PMIDs. Requests started with Journal UI or title search have **Journal Information** filled in, with **Article Information** blank. Citation Information is completely blank for Manual Requests.

Request Information

The Request Information part of the request form is where users are most likely to make changes regarding individual requests. The Request Information portion contains the same choices regardless of request method. The fields are largely pre-populated from Borrower defaults or with universal request defaults (i.e., Service Type=Copy, Service Level=Normal, Fill from Format=Any Format). All fields are editable.

Authorized By

Lists staff information indicating who authorized and/or placed request. (required)

Service Type

- **Copy** – request for reproduction of specific article or, chapter (default).
- **Loan** – physical loan of entire journal issue, monograph, or A/V materials (required)

Service Level

- **Normal** – request will be processed as part of lender’s normal ILL processes (default).
- **Rush** – lender should process request the same day
- **Urgent Patient Care** – lender should process and ship request immediately. Lenders should check for new requests at least every 2 hours. (See [5.5](#) for rules on when requests will reroute for each service level).

Fill from Format

Indicates borrower's choice for format of the journal from which to fill request. Default is "Any" format. (required)

NOTE: Choose "E-Journal" to limit your lenders to Lenders reporting Electronic holdings.

Maximum cost

Indicates the maximum amount the borrower is willing to pay for the ILL request. (required) Input **0** (zero) if you need "no cost" borrowing.

While cost is not used in determining routing, routing tables should be constructed with lowest cost potential lenders in the lowest number cells for the most cost-efficient borrowing.

Patron Name

Listing the Patron name enables incoming articles to be matched to your original requestors. Most lenders include a copy of the request with delivered material. Using codes for your patrons may reduce risks to privacy. (optional)

Need by Date

Date beyond which requested material is no longer wanted. Need by Date is checked at every reroute. If request is at Received status when Need by Date passes, the lender may still update the request as Filled. If the lender rejects the request, DOCLINE will then retire the request as Expired. (optional)

Copyright compliance

- **Guidelines:** Indicates that the borrower's ILL request complies with U.S copyright law under Section 108, including items borrowed within the CONTU Guidelines "Suggestion of Five".
- **Law:** indicates that the borrower's ILL request complies with copyright law by being a "Fair Use" under Section 107 of the U.S. law OR your country's equivalent of "Fair Use", paying royalties to copyright holder directly or through an agent such as Copyright Clearance Center (CCC); or requested item is not covered by copyright. For more information, see [DOCLINE Copyright Options \(https://www.nlm.nih.gov/docline/context_help/copyright_choices.html\)](https://www.nlm.nih.gov/docline/context_help/copyright_choices.html).

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.

(required)

Comments to Lender

Do not duplicate information that automatically displays on request. Use sparingly to add clarity or emphasis. (optional)

Routing Information

Only Route to EFTS Participants

If you select EFTS as a limit in routing or in your Borrowing Preferences, DOCLINE will send your borrow requests only to EFTS participants that also match the rest of your routing instructions.

To set default routing for all requests to go to EFTS participants only, do the following:

STEPS

1. Select **Libraries** from the DOCLINE main menu.
2. Select **Manage Library**.
3. Scroll to Borrow Defaults in your **Library Profile**.
4. Click **Edit**, then select 'Yes' for 'Route Only to Libraries Participating in Electronic Funds Transfer Service (EFTS)' under Automated Routing Borrow Defaults.
5. Click **Update Library**.

NOTE: If your library is a member of the FreeShare Library Group, selecting 'EFTS only' may prevent your Borrow requests from routing to non-EFTS FreeShare Libraries that would like to reciprocate.

Route Directly to Library

If a valid LIBID is entered, request will route first to this library if the library meets other routing instructions. Holdings are not considered. (optional) Limit of one (1) LIBID.

Routing Cells

Indicates which of the borrower's (Automated or Manual) Routing Table cells will be used during the routing of request. Cells may be selected or deselected optionally.

Additional Routing Options

Route to NLM

Determines whether the routing algorithm will send the request to NLM (LIBIDs: MDUNLM, MDULMF, and MDUHMD) during routing. (optional)

Route to All Other Libraries

Determines whether the routing algorithm will attempt to route the request to All Other participant libraries. Not available for Manual Routing. (optional)

Do Not Route to the Following Libraries

Used to prevent PMID or Journal requests from routing to individual libraries in Library Groups in Automated Routing Table, or All Other Libraries; or to temporarily prevent requests from routing to lenders listed individually in Automated Routing Table cells. Limit of twenty (20) LIBIDs. Not available for Manual Routing. (optional)

Delivery information

This portion is fully populated from Borrower defaults and can be edited as needed. The more delivery methods accepted the wider the pool of potential lenders.

- **Primary Delivery Method:** Indicates borrower's preferred delivery method to receive requested materials.
- **Alternate Delivery Methods:** Indicates borrower's accepted alternate delivery methods to receive requested materials.
- **Electronic Address:** Addresses to be used for delivery via Email, Odyssey, or Fax.
- **Physical Address:** Address to be used for delivery of loans or photocopies.

6.3 How to Request with PMIDs

Requests that start with PMIDs are most efficient for *Borrowers* because "official NLM" complete article and journal information is automatically filled in. It is most efficient for *Lenders* because a valid complete (PubMed) citation means it can be matched to them based on their DOCLINE Journal holdings, and because it contains all required information to fill (fewer INC rejections).

There are two (2) ways to begin a request if you already have article PMIDs.

The easiest method is to paste or type PMIDs directly into the home page search box labeled **Got PMIDs? Get articles!** Alternatively, users may choose **Place request – PMIDs** from the **Borrow** menu and input PMIDs in the same manner.

Up to five PMIDs may be entered at a time. PMIDs may be separated by spaces or commas.

STEPS

1. (a) Type or paste PMIDs into Homepage Search box and click Search.

-OR-

- (b) Go to Borrow>Place Request – PMIDs, input PMIDs and click **Find PMIDs**.

All articles are selected by default on the resulting **Citation Information** page.

2. If individual articles are for different patrons, have different need by dates, or require different service levels, uncheck the articles that need to be ordered separately to input those values.
3. You may abandon ordering (de-select articles) if system prompts alert you to circumstances that mean the article is no longer needed via ILL. For more information on borrower warnings, such as "Free Alerts" see section [6.9](#).
4. Click **Next**.
5. Review the different sections of the resulting "**PMID Request – Place Order(s)**" screen and make changes as necessary to "**Request Information**", "**Routing Information**" and "**Delivery Information**".
6. Click **Place Order**.

When the transaction(s) complete successfully, the **PMID Request – Results** page displays with the citation(s), the DOCLINE request numbers, the Lender to which each request routed, as well as the Library and Username of the Borrower.

Users may select **Return to Citation List** (if unordered articles remain)

-OR-

View All Request Receipts to print and file hard copies of requests.

6.4 How to Request with Journal Information

There are two (2) ways to start a request with journal information, which allows your request to be matched to lenders based on journal holdings. You can begin with a Journal Unique ID (UI) or with a Journal title.

STEPS

1. Go to Borrow>Place Request – Journal ID (ISSN, NLMUI, OCLC), input UI in the search box and select the appropriate **Identifier Type** and select **Find Journal**.

-OR-

Go to **Journals>Search**, input Title or UI and select **Search**. For the desired journal, select the hyperlinked title to drill down to the Holdings level, then select **Request Item**.

2. Review the different sections of the resulting Unique Journal ID Order – Place Order screen and input Article Information in the "Citation Information" section
3. Make changes as necessary to "Request Information", "Routing Information" and "Delivery Information"
4. Click **Place Order**.

When the transaction completes successfully, the "Unique Journal ID Order – Success" page displays the DOCLINE request number and the Lender to which request routed.

5. Users may select **View Request Receipt** to print

-OR-

Go Home to return to the **Activity & Status** area.

6.5 How to use Request Manual

This option should be used when desired articles are in journals not found in DOCLINE Journals, or for requesting books or book chapters. Because there are not holdings for books or non-NLM journals in DOCLINE, Manual requests are not matched to lenders by the algorithm. They route sequentially to up to nine (9) libraries listed in the borrower's Manual Routing Table, or to LIBIDs input at the time of ordering.

STEPS

1. Go to Borrow>**Place Request – Manual**
 2. Review the different sections or panes of the resulting Manual Order – Place Order screen and fill in the **Citation Information** portion.
 3. Make changes as necessary to “Request Information”, “Routing Information” and “Delivery Information” sections
 4. **NOTE:** If desired journal or book is not in LocatorPlus (NLM's catalog), NLM does not own the item. Deselect Route to NLM, if checked.
 5. Click **Place Order**.
 6. When the transaction completes successfully, the “Manual Order – Success” page displays the DOCLINE request number and the Lender to which request routed.
 7. Users may select **View Request Receipt** to print
- OR-
- Go Home to return to the Activity & Status area.

6.6 No Lenders Found

If your borrow request(s) cannot be matched to any active lenders this message displays:

“We couldn't find a lender | Note: Change your requested routing, delivery, service level, or format options during ordering to increase the number of potential lenders.”

Users may return to the previous screen to make different choices as suggested. This message may result on weekends and holidays when many lenders are *inactive*. (See 6.10 for details on different aspects of routing.)

6.7 Resubmitting Retired Unfilled Request

You may resubmit a request that has ended (retired) unfilled, so that you do not have to fill out an entirely new request. The original form inputs are re-used so that you can review and revise the information on the new request before submitting.

Retired Requests (last 7 days) show on the homepage Activity & Summary **MY BORROWING** card. Click through links to view your unfilled requests that may require follow up. Be sure to review the history of the Request if you plan to resubmit it, to determine what changes to make to the Routing Instructions.

Requests most commonly retire as unfilled due to copyright, cost, or incomplete citation information. See [DOCLINE Help: Tips for Resubmitting a Retired Unfilled Request \(nih.gov\)](https://www.nlm.nih.gov/docline/context_help/resubmit_tips.html) (https://www.nlm.nih.gov/docline/context_help/resubmit_tips.html) for more details on adjusting a retired request for resubmission.

STEPS

1. From the **Activity & Status** section of the home page in the **My borrowing** pane click on **Retired Requests (last 7 days)**
-OR-
Borrow > Search requests
2. Either enter specified search parameters and then click **Search** or leave search fields empty (null search) and click search to return all borrow requests
3. Scroll to the retired request that you wish to resubmit.
4. Click **Show Request History** to identify any possible issues with the way it was submitted previously (often it's due to questions of copyright, cost, or incomplete information)
5. Click **Resubmit Request**, then revise the original request in hopes of fulfillment.
NOTE: Choosing to resubmit a request will result in the same ordering method as originally used.
6. Click **Resubmit Request**

The "Resubmit Borrow Request for Your Library Name (LIBID) - Success" page will display including DOCLINE request number and the Lender to which request routed

7. Users can choose to **Go Home** or **View Request**

6.8 Cancelling a Borrow Request

Borrowers may cancel requests; however, cancellation success depends on the status of the request at the time.

Requests with the following statuses can be cancelled immediately.

- **New** - new request entered by borrower, but not yet received by a lender.

- **Rerouted Online** - request was not filled by previous lender and has been rerouted to the next potential lender.
- **Rerouted TTA** - rerouted because of DOCLINE time-triggered actions after potential lender did not receipt or act upon the request.

Cancelling requests that have **not been receipted yet** results in this message: "Success! The following request was cancelled".

Requests that have already been **Received** by an institution can only be marked Pending Cancellation. The potential lender may be in the process of filling a received request and is given the opportunity to update the request as "*Filled*".

After selecting **Cancel**, the user sees: "Success! The following request is pending cancellation. The current lender has opportunity to update before cancellation is processed." In search results the request now shows "Pending Cancellation".

If the request is updated as "*Not Filled*" by the lender, the request is immediately cancelled. Borrowers can call the lender to notify them of the pending cancellation, but the lender's workflow may not permit this accommodation.

STEPS

1. If the request number, patron name or delivery email is known, input it in the homepage **Borrow Search** box, otherwise use **Borrow Search** to retrieve the desired request using date or other filters
2. Select **Search**
3. Search results display. A **Cancel** button appears on requests which are still open.
4. Click **Cancel**.

6.9 Warnings for Borrower

To alert the user to circumstances that might lead them to abandon their ILL request(s) the system prompts the borrower with warnings.

Previously Ordered PMID

This message appears on the citation information page that displays after PMIDs are input.

"You previously ordered this citation on Date, Time, (Request Number)."

This notification displays only for PMID requests completed within the last 30 days.

You May Already Own This

This message appears if the volume -or- year of the desired article falls within your own reported journal holdings.

"You May Already Own This. Your library reports holding Volume # or Year YYYY of Title"

This message appears within both PMID and Journal UI requests.

NOTE: Borrower's own embargoes are not evaluated as part of this message display.

Copyright Review

Because the default Copyright Compliance choice for most DOCLINE libraries is 'Guidelines' which is applicable only if the desired article was published within the last five years, users are prompted to review their choice if the article being requested was published more than five years ago.

"This article was published more than five years ago. Review your [copyright compliance choice](https://www.nlm.nih.gov/doctype/context_help/copyright_choices.html)."
(https://www.nlm.nih.gov/doctype/context_help/copyright_choices.html)

Free full-text may be available

This message appears during PMID ordering if the PubMed record includes links to free online full-text of the published article.

"Free full-text may be available. Check availability before completing your request. "

Author manuscript available

This message appears during PMID ordering if the PubMed record includes links to the Author Manuscript version of the article, in PubMed Central (PMC).

"Author manuscript available. It may differ from published article. Check availability before completing your request."

6.10 Understanding Routing

The Borrowers' routing choices determine how few or how many libraries are considered potential lenders by the system. The individual factors that are matched up vary depending on the requesting (routing) method. Users can establish default values for routing in the Borrow Information section of their Library Profile.

Routing Options

While Borrowers should rely on a well-crafted Automated Routing Table which allows their requests to be matched to lenders based on multiple factors, there are other options for use when Automated Routing has failed or is not possible.

Route Directly to Library

If selected by borrower when placing a request, this option sends request to a single library (previously referred to as prefixing). If the 'prefixed' library is inactive at time of routing, and additional routing options are selected, "Direct to Library" will be skipped and other routing options will be applied.

Borrowers should rely on Automated Routing, which is randomized, balances the lending load, and generally ensures that lenders can provide the requested materials; However, routing directly to a single lender may be used when automated routing has been unsuccessful or if the requested item is a book or is not in LocatorPlus, NLM's catalog.

NOTE: with "Route Direct to Library" option, the Routing Algorithm does NOT compare request to library journal holdings.

The routing algorithm will only directly route a request to a library **IF**

1. the selected *Primary Delivery Method* **OR** one of the *Alternate Delivery Methods* is supported by that library, **AND**
2. the library is *Active* at the time of routing **AND**
3. the library is *not* in the borrower's *Do Not Route to List* **AND**
4. the library provides the selected *Service level* (if above Normal) **AND**
5. the library is an *EFTS participant* (if selected).

NOTE: Selecting an individual library to "Route Directly to" should **not** be necessary in most cases. If your requests are frequently not routing to preferred lenders, review your routing table with [DOCLINE Support](https://support.nlm.nih.gov/support/create-case/). (<https://support.nlm.nih.gov/support/create-case/>)

Automated Routing Table (using cells selected)

The system will select up to 20 potential lenders from your routing table that match your borrowing criteria and have the desired journal.

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

1. the selected *Primary Delivery Method* is offered by that library **AND**
2. that library reports owning either the *volume* **OR** *year* of the title **AND**
3. the library holdings are in the requested *format* (if selected) **AND**
4. the library is *Active* at the time of routing **AND**
5. the library is *not* in the borrower's *Do Not Route to List* **AND**
6. the library provides the selected *Service level* (if above Normal) **AND**
7. the library is an *EFTS participant* (if selected) **AND**
8. the library holdings are *not embargoed** (if E-Journal);
THEN if less than 20 libraries matched for routing, the algorithm loops back and looks for Lenders offering your *Alternate Delivery methods* **AND**

9. conditions 2-8 are met.

*** Then repeat for routing cell 2, cell 3, etc. ***

* **NOTE:** Embargoes can only be evaluated for PMID requests with an EpubDate.

NLM (after Automated Routing)

If selected by Borrower default or when placing a request, this option sends request to the National Library of Medicine. If desired journal or book is not in LocatorPlus, NLM does not own the item. DO NOT Route to NLM.

NOTE: Routing Algorithm does NOT compare request to NLM's journal holdings.

Request will route to the National Library of Medicine **IF**

1. Route to *NLM* is checked **AND**
2. the selected *Primary Delivery Method* **OR** one of the *Alternate Delivery Methods* is offered by NLM
3. NLM provides the selected *Service level* (if above Normal) **AND**
4. NLM is *Active* at the time of routing.

All Other Libraries (after Automated Routing)

The routing algorithm checks libraries not previously evaluated as potential lenders.

(If selected) The routing algorithm will randomly route a request to a library **IF**

1. the selected *Primary Delivery Method* is offered by that library **AND**
2. that library reports owning either the *volume OR year* of the title **AND**
3. the library holdings are in the requested *format* (if selected) **AND**
4. the library is *Active* at the time of routing **AND**
5. the library is *not* in the borrower's *Do Not Route to List* **AND**
6. the library provides the selected *Service level* (if above Normal) **AND**
7. the library is an *EFTS* participant (if selected) **AND**
8. the library holdings are *not embargoed** (if E-Journal);
9. the request did not previously route to institution **AND**
10. **THEN** *if less than 20 libraries matched for routing, the algorithm loops back and looks for Lenders offering your Alternate Delivery methods* **AND**
11. conditions 2-9 are met.

Manual Routing (M/A/N Map)

This routing method should be used only to request **M**onographs (books), **A**/V materials or articles in journals **N**ot found in NLM's catalog.

NOTE: Because manual routing is expressly for materials without catalog records and therefore without Unique IDs -- or for monographic materials, holdings of which are not reported in DOCLINE -- the Routing Algorithm cannot compare request to library holdings.

In Manual Routing, request routes sequentially through cells 1-9 to the libraries designated **IF**

1. the selected *Primary Delivery Method* OR one of the *Alternate Delivery Methods* is supported by that Library **AND**
2. the library is *Active* at the time of routing **AND**
3. the library provides the selected *Service level* (if above Normal) **AND**
4. the institution is an *EFTS participant* (if selected)

Select Lenders with specified journal format

To filter out lenders that do not report owning the desired format of the journal (print or electronic), borrowers may select the specific format needed. When access to physical collections is limited, choose **E-Journal** in the **Fill from Format** field in the **Request Information** section of Borrow requests.

The options for **Fill from Format** are **E-Journal**, **Print** and **Any Format**. The default is fill from "Any format".

Avoid Lenders: Do Not Route to

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

Borrowers can prevent their requests from routing to a specific Library by adding the LIBID to the **Do Not Route To** list. This can be done for an individual request during the Borrow process, or with a set list of **Do Not Route To** LIBIDs in the Borrow Information>Automated Routing Borrow Defaults section of your Library Profile. (See page [40](#) for more information).

NOTE: Users who want to permanently prevent requests from routing to libraries listed individually in their Routing tables should remove the LIBIDs from their Routing Tables rather than using the Do Not Route To feature.

Routing Embargo Evaluation

Because Journal UI and Manual Requests often do not include complete or well-formatted article publication dates, only PMID requests can be compared against Holdings Embargoes. Additionally, the

PubMed record for the PMID must include an Epubdate, which is used to calculate the article's 'age' to be compared to the embargo period.

Holdings Embargoes are not compared for article requests placed with the Journal UI or Manual request method.

6.11 Viewing Request History

With the **Show Request History** button that appears on Request Cards in Borrow Search, borrowing libraries can view the detailed routing history of their requests.

Request History includes:

- **Date / time:** When Action occurred. System time is US Eastern Time.
- **Action:** Request status or what happened to it
- **Reason:** If request is Rejected or otherwise re-routed it displays in this column. (See [5.10](#) for reasons). Otherwise, blank or "request"
- **Library:** Name and LIBID of the library when Action or Reason was applied
- **Via:** Method by which request was matched to lender or removed from lender, for instance "Cell 1", or "Direct to Lender"

6.12 Borrow Search

Borrow Search is available directly on the homepage and from the Borrow menu. Any requests created by the borrowing library within the last 150 days requests may be viewed in Borrow Search.

Clicking **Search** without any other input will return all available results.

WARNINGS for impending TTA-removal display in Request Search Results ONLY for both Borrower and Lender. (See 5.11 for more details).

Borrow request cards show:

- Request number
 - hyperlink displays request receipt in a new window
- Citation summary
 - e.g. Clin Ther 2000 Dec;22(12):1433-42
- Lender Institution name and LIBID
- Request Date:
 - Date and time request originally placed by the borrower
- Latest Action:
 - The present state of the request. If "Filled" actual delivery method also displays
- Latest Action Date
 - Date and time request reached present state
- Action buttons (not visible in Lender view)

- Show Request History
- Cancel Request (displays if unfilled and not yet retired)
- Resubmit Request (displays if retired unfilled)

Borrow Search Terms and Filters

Clicking **Search** without any search terms or filters returns all requests from the last 150 days.

Requests can be retrieved with these search terms:

- Request Number(s)
- Patron Name
- Delivery Email

And further limited by:

- Date (Latest Action Date)
- Request Status
 - Open
 - Retired – Filled
 - Retired – Unfilled
 - Any
- Service Level

By default, Request search results are in date order, with the oldest first. Other Sort options are:

- Requests – Newest
- Lending Library – LIBID
- Patron Name
- Journal Title

Sort options are available in the bottom of the Filters panel.

7 Libraries

The Libraries menu options: **Manage library**, **Switch library** (if applicable), and **Search libraries** give users the ability to modify information and preferences for their own library (or libraries, if they manage more than one with the same user account), as well as the ability to search for other libraries to view information about their lending policies, performance, or fees.

Every library has a **LIBID**, which is a unique Library Identifier that is assigned to all libraries that use DOCLINE or borrow from NLM. (See [1.5](#) for more information).

7.1 Manage Library

Manage library opens your Library Profile. This record contains all the information about a library, as well as the default settings (preferences) that govern Lending and Borrowing.

It is important to keep your Library Profile information up to date as it pre-populates your borrowing requests and determines which requests will route to you to fill. For instance, choosing Odyssey as your primary way to receive articles limits the number of potential lenders as not all offer that delivery method. Likewise, lenders with only one delivery method offered may receive fewer requests to fill.

To view the details of each section, click the hyperlinked words or anywhere in the shaded area to expand that portion of the profile.

NOTE: All the information in the Library Profile is visible to other DOCLINE participants, except for the contents of the Automated routing table.

Library Addresses & Other Information

Delivery & Billing

The Delivery & Billing panel contains all the physical and digital address information needed to deliver an article or book to your library, regardless of delivery method. It also contains the same information for your organization's billing or accounts payable information for delivery of invoices.

The **Delivery Email** address displays on request receipts and is also used by the system for **Lend Alert** and **Contact Library** emails.

Fax numbers and Odyssey addresses appear on receipts if selected as Alternative Delivery Methods.

Billing address information is transmitted to EFTS for libraries that participate.

Other Identifiers

This optional information may be used by libraries during billing for ILL, confirming lenders for book loans, or locating NCBI LinkOut participants.

- Federal Employer Identification Number (FEIN)
- OCLC symbol
- LinkOut Name Abbreviation

Library & Organization Type

Library Type is an available filter in Libraries Search. It is established when the library record is originally created.

Library Types:

- Hospital
- Academic

- Public
- Other

Organization Types are used for display and system analysis only. Organization Types:

- Federal
- Other

Borrow Information

Setting Borrow Defaults

Borrow Defaults (preferences) automatically fill in your request forms every time you order. Your Borrow Defaults help determine which lenders your requests are routed to by the system. Selecting more delivery methods allows a larger pool of possible lenders thus a greater likelihood of a successful transaction.

STEPS

To set or update your **Borrow Defaults**:

1. Select **Libraries** from the DOCLINE main menu
2. Select **Manage Library**

Your organization's Library Profile displays

3. Scroll to **Borrow Information**
4. Expand the **Borrow Defaults** section
5. Select **Edit** to change the values that will populate your requests:
 - **Preferred Delivery Method** for receiving materials
 - Acceptable **Alternate Delivery Methods**
 - **Maximum Willing to Pay** (Max Cost) for ILL requests. If you need material free, enter "0.00". Required, cannot be blank.
 - **Copyright Compliance**: Guidelines or Law. *
 - **Authorized By** the name or initials of the person responsible for placing and paying for requests. (optional)
6. Select **Update Library** to save your changes.

* **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). For more information, see the

[DOCLINE Copyright Compliance Options](#)

(https://www.nlm.nih.gov/docline/context_help/copyright_choices.html).

Automated Routing Defaults

The Routing Algorithm automatically picks lenders from the borrower's Automated Routing Table cells, based on reported Journal Holdings and other factors.

Depending on how a library’s Automated Routing Table is structured, their Journal Routing Defaults – which Routing Table cells are regularly checked for lenders – may vary. If cells have been set aside for ‘special purpose’ routing they should not be selected for everyday routing.

Choosing Lenders, Routing Table Options

To get the best results for cost-effective and efficient borrowing, structure your Routing Table so that preferred no- or low-cost lenders are in lower numbered cells, followed by preferred lenders with higher costs in subsequent cells. Consider the location of lenders in Routing Table organization in addition to cost, adding libraries in your state or region in lower numbered cells, followed by other more remote libraries in higher numbered cells.

When choosing lenders, consider the **Lend Information** in their Library Profile:

- **Lender Performance statistics** (time to fill – AKA “turnaround time”, fill rate)
- **Library Lending Groups**
- **Request Charges**

You may also consider the lender’s collection size listed in **Journal Holdings**, and days of service listed in their **Library Schedule**. See table below for more information.

Table 4 - Sample Routing Table Configuration

| Cell Number | Suggested Lender relationship(s) or categorization |
|-------------|--|
| 1 | Local Reciprocal Agreements |
| 2 | Library Group 1 |
| 3 | In state universities or large medical centers |
| 4 | Selected large collection, low-cost lenders |
| 5 | Library Group 2 |
| 6 | Alternate Coast Lenders |
| 7 | Weekend Lenders |
| 8 | Nursing Schools |
| ... | Health Departments |

Libraries may opt to create ‘special purpose’ cells, for instance east or west coast cells if they regularly order rush requests and want DOCLINE to attempt routing to a certain geographic region or time zone first.

Each Automated Routing Table cell may contain up to 20 libraries, and 1 Library Group. Only Library Groups of which you are a member are available to add to your routing table. Individual libraries and libraries in a Library Group within the same cell are treated equally by the routing algorithm. Libraries are displayed in alphabetical order, although lender selection is randomized.

Routing table cells can be selected or deselected during the requesting process.

Automated Routing Borrow Options

These selections are used to limit routing of your borrow requests, or determine routing options if Automated Routing does not result in a filled request.

STEPS

1. Select **Libraries** from the DOCLINE main menu
2. Select **Manage Library**

Your organization's Library Profile displays

Scroll to **Borrow Information**

3. Expand the **Automated Routing Borrow Defaults** section.
4. Select **Edit** to modify the choices that will determine routing for your requests:
 - **Route Only to EFTS Participants** – available only if Library is an EFTS participant. If selected, Routing Algorithm filters out lenders that are not EFTS participants, including those in your routing cells and library groups such as FreeShare.
 - **Route to NLM After Automated Routing** – if selected, Routing Algorithm will automatically route to NLM if request cannot be filled by, or remains unfilled by, Routing Table libraries
 - **Route to All Libraries After Automated Routing** – if selected, Routing Algorithm will automatically search for lenders among “All Other Libraries” if request cannot be filled by, or remains unfilled by, Automated Routing Table libraries and NLM
5. **Do Not Route to the Following Libraries** – excludes entered libraries from consideration as lenders. (See page [28](#) for more information on avoiding Lenders).
6. Select **Update Library** to save your changes.

Updating your Automated Routing Table

Routing Table – Select Cells

For cost-effective, efficient borrowing, Routing Table structure should include reciprocal agreement, and preferred no- or low-cost lenders in lower numbered cells, including Library Groups, and preferred lenders with higher costs in higher numbered cells.

Depending on how a library's Automated Routing Table is structured, their Journal Routing Defaults – which Routing Table cells are regularly checked for lenders – may vary. If cells have been set aside for 'special purpose' routing they should not be selected for everyday routing.

STEPS

1. Select **Libraries** from the DOCLINE main menu
2. Select **Manage Library**

Your organization's Library Profile displays

3. Scroll to **Borrow Information**
4. Expand the **Automated Routing Table** section
5. Select the **Edit** button to change the Journal Routing Defaults determining which numbered Routing Cells are checked for Lenders
6. Select **Update Library** to save your changes

Routing Table – Add Libraries

STEPS

1. Select **Libraries** from the DOCLINE main menu
2. Select **Manage Library**

Your organization's Library Profile displays

3. Scroll to **Borrow Information**
4. Expand the **Automated Routing Table** section
5. Select the large **Routing Table Management** button to update the preferred Lenders or Library Groups* in each of nine Automated Routing Table Cells
6. Select **Update Library** to save your changes.

*Only Library Groups of which your library is a member are available to add to Routing cells.

Manual Routing Table (M/A/N Map)

This routing method should be used only to request **M**onographs (books), **A**/V materials or articles published in journals **N**ot found in NLM's catalog. Manual routing lender defaults are not required.

Because larger collections - such as those held by large universities, medical schools or teaching hospitals - are most likely to contain a wider variety of books needed or journal titles that are not in NLM's catalog, users may choose to prepopulate their Manual Routing Table with larger institutional lenders.

In general, borrowers should start their routing with local lenders before selecting lenders from the broader state or region.

STEPS

1. Select **Libraries** from the DOCLINE main menu
2. Select **Manage Library**

Your organization's Library Profile displays.

3. Scroll to **Borrow Information**
4. Expand **Manual Routing (M/A/N Map)** section.
5. Select the **Edit** button to update the preferred lenders in each of nine Manual Routing Table Cells

6. Select **Update Library** to save your changes

NOTE: Because manual routing is expressly for materials without catalog records and therefore without Unique IDs, or for monographic materials, holdings of which are not reported in DOCLINE, the Routing Algorithm cannot compare manually routed requests to library holdings.

Lend Information

General service information

To set or update your **Lend Defaults**:

1. Select **Libraries** from the DOCLINE main menu
2. Select **Manage Library**

Your organization's Library Profile displays

3. Scroll to **Lend Information**
4. Expand the **General** section by clicking on the word General or anywhere within the General row
5. Select **Edit** to change the values that will affect what requests are routed to your library:
 - Participates in Electronic Funds Transfer Service (EFTS): Yes/No
 - Fills rush requests: Yes/No
 - Fills Urgent Patient Care requests: Yes/No
 - Comment to borrowers
 - Delivery Methods Offered: (select all that apply)
 - Article Exchange (OCLC application)
 - Email (PDF) (required)
 - Fax
 - Mail
 - Odyssey (OCLC application)
 - Pickup
 - Web (PDF)
 - Send Lend Alert Notification Emails
 - Normal
 - Rush (on by default)
 - Urgent Patient Care (on by default)
6. Select **Update Library** to save your changes.

Participates in EFTS

indicates whether library participates in the Electronic Funds Transfer System which allows lenders to submit filled request charges electronically and automatically collect fees from other participating libraries. (See section [11](#) for information).

NOTE: To begin or end EFTS participation, email [EFTS Customer Support \(efst@mail.mlahq.org\)](mailto:efst@mail.mlahq.org).

Fills Rush Requests / Urgent Patient Care Requests

indicates what level of expedited service your institution can provide borrowers over and above 'normal'. Rush requests must be processed the same day, while Urgent requests should be processed immediately.

NOTE: Libraries must be sufficiently staffed daily if choosing to offer *Rush* or *Urgent Patient Care* service. Lenders providing *Urgent Patient Care* service should check for new requests at least every 2 hours and should consider using the Lend Alert feature that sends an email notification each time a new request routes to the library. (See [5.5](#) for more information on Service Levels and Time-Triggered Actions).

Comments to borrowers

Lender comments should briefly describe institution's key information or service notes not reflected in other Library Profile sections.

Ex: "Open 9-5", "call for UPC", "surcharges may apply", "Rush, \$5 extra," "Fills only from E-Journals"

Delivery Methods Offered

Indicates which methods your library uses to deliver ILL copy request material.

- Article Exchange - OCLC post-to-web application. Borrower receives email with link to retrieve/download article
- Email (PDF) – PDF as email attachment sent to your Library Contact, specified in Delivery section of your Library Profile
- Fax
- Mail – Postal mail. Unchecking this method prevents borrowers from requesting loans of physical objects.
- Odyssey - FTP transmission method developed by Atlas Systems
- Pickup – you will send someone to physically pick up the item from lender
- Web (PDF) - post-to-web. Borrower receives email with link to retrieve/download article

NOTE: The delivery method values are checked by DOCLINE when routing copy requests.

Send Lend Alert Notification Emails

For each request type, indicate whether your library wants to receive an email message each time a request routes to your library to be filled for another library.

Lend Alert emails are sent to the Lender's Delivery Email address, as well as to each Contact marked with the ILL Role.

Lender Performance Statistics

This panel displays the library's **Fill Rate** and **Days to Process** (turnaround time) for filled requests during the previous calendar month. These statistics are used by other libraries to evaluate your library's lending activities.

The Request Report Dashboard button, which is revealed when the panel is expanded, takes the user to the Request Reports landing page where prior months Activity Summaries are available. The button does not display to other libraries.

Refer to [Request Report Help](#) for details of how these figures are calculated. (See section 9 for more information.)

Library Lending Groups

The Library Lending Groups of which the library is a member are displayed in this panel. To be added to or removed from a Library Group contact DOCLINE Support.

Request Charges

In this panel enter your library's **Base Fees** for lending. Separate fees listed for:

- My Library Group Members
- My Reciprocal Partner Libraries
- Any Other Libraries

Lender Request Charges and Borrower's Max Cost are **not** used by the DOCLINE Routing Algorithm when it determines potential lenders. Borrowers should structure their Routing Tables based on Lender charges. (See page 41 for more information).

My Library Group Members

Each group your library belongs to is listed. The **Base Fee** and **Comment** is drawn from the Library Group record and cannot be edited by members.

My Reciprocal Partner Libraries

Individual or local **reciprocal** agreements. Users can modify their base fee and enter additional comments.

Any Other Libraries

Libraries with which your library has no reciprocal agreements or no common group membership. Users can modify their base fee and enter additional comments.

Loaning Policies (Original Materials)

This section of the Library Profile contains information about what physical items (books or journals) are presently available from your library and whether you may be able to provide scans from print or to lend books, complete journal issues or bound journal volumes. Choose **Edit** to update the information displayed to borrowers about your physical collection and lender policies. Select **Update Library** to save changes.

NOTE: These values are not used by the routing algorithm.

Print Resources Available

Check this box to indicate you are currently filling copy or loan requests from your physical collection. This indicator is used by the "Print Resources Available" Library Search filter, but not in routing.

Books

Modify this setting to indicate that your library lends out physical copies of monographs (books) and to provide details regarding your library's policies about length of loan period and whether renewals are allowed. If **Will Loan** box is checked, a loan period greater than zero must be entered. (The default value of zero is required even if policy is set to No).

Journals

Modify this setting to indicate that your library lends out physical copies of journals (single issues or bound volumes) and to provide details regarding your library's policies about length of loan period and whether renewals are allowed. If **Will Loan** box is checked, a loan period greater than zero must be entered. (The default value of zero is required even if policy is set to No).

International Service Offerings

This section of the Library Profile contains information about services offered to international libraries, if any. Choose **Edit** to update the information displayed.

NOTE: These values are not used by the routing algorithm.

International Copy Service

If you modify this setting to indicate that your library **Sends copies to international libraries** (is set to Yes) you must also choose countries served or choose 'Select All'. Select **Update Library** to save changes.

International Loan Services

If you modify this setting to indicate that your library **Lends original materials to international libraries** (is set to Yes) you must also choose countries served or choose 'Select All'. Select **Update Library** to save changes.

Library Schedule

The Library Schedule portion of the Library Profile allows user to include the days their library is usually open for ILL lending, as well as the Out of Office option for holidays, vacations, and other outages.

Lending Days

Libraries can indicate the days of the week that they are normally available to fill Lend requests by setting their **Standard Lending Days**. *The system requires at least two days per week.*

STEPS

To modify your library's daily schedule:

1. Select **Libraries** from the DOCLINE main menu
2. Select **Manage Library**

Your organization's Library Profile displays

3. Scroll to **Library Schedule**
4. Expand the **Library Schedule** section
5. Select **Edit** button to modify the Library's **Standard Lending Days**
6. Select **Update Library** to save your changes

Out of Office – Temporary Deactivation

When temporarily unavailable to lend, libraries can input **Out of Office** dates. The maximum time span is three months.

STEPS

To modify or input out of office dates:

1. Select **Libraries** from the DOCLINE main menu
2. Select **Manage Library**.

Your organization's Library Profile displays

3. Scroll to **Library Schedule**
4. Expand the **Library Schedule** section
5. Select **Edit** button to input **Out of Office** time periods
6. Select **Update Library** to save your changes

NOTE: If Out of Office date rows are filled and additional Out of Office dates are desired, select **Update Library** to save, then **Edit** and new blank rows will appear. Prior Out of Office time spans should be manually deleted.

Journal Holdings

The information in this panel is drawn from other parts of DOCLINE and is not editable. Summary data about your library's holdings, as well as information about how and when it was last updated is displayed. This information may be used by other libraries when they are considering your library as a potential lender to see how large your collection is and how up to date your holdings information is.

Holdings Summary displays the following:

- **Total Holdings:** total number of holdings records, so may exceed total number of titles held as libraries may report owning titles in multiple formats
- **E-Journal (Embargoed):** total number of Electronic format holdings records as well as the subtotal () that include embargoed access
- **Print:** total number of Print format holdings records
- **Other:** total number of Other format holdings records

The Last Updated information includes the date any of the library's holdings records were last modified, whether the update was system or user applied, the username (if applicable) and the update method used. Recommended Best Practices suggest that libraries should annually review their holdings to avoid receiving requests for titles they no longer own.

Contacts

Every library must have at least one contact. Contacts are assigned roles. ILL, Billing and Serial Holdings are required roles. If there is only one contact, they must be assigned all three roles. Emailed Lend Alerts are sent to those with the ILL role.

There is also an "Other Role(s)" option. Contacts assigned 'Other Role(s)' may be explained with a comment, for example "Library Director".

Add, Edit or Delete Contacts

Use the **Add Contact** button that displays above the Contacts panel to add new contact records.

To **Edit** or **Delete** a contact record, expand the panel and select the appropriate button. After modifying a contact, select **Update Contact** to save your changes.

STEPS

1. From the DOCLINE main menu, select **Libraries**
2. Select **Manage Library**
The Library Profile page displays
3. Scroll down to Contacts section
 1. Click **Add Contact** button to add a contact
 2. Click **Update Contact**

1. To edit or remove an existing contact, click the person's name, then **edit** and Click **Update Contact**
 2. Click **Delete**
-
1. To delete an existing contact, click the person's name, then click **Delete**.
 2. Confirm the deletion when prompted

You may be unable to save a contact record if the required roles are not selected in it or in another contact record.

7.2 Switch Library

If your username is linked to more than one DOCLINE library because you are responsible for multiple libraries, you will see a **Switch Library** option displayed to the right of your LIBID, above the Activity & Status cards on the homepage.

You will also see a **Switch Library** option in the Libraries menu. This option only displays for user accounts linked to multiple libraries.

Choosing this option displays all the libraries that are linked to the username you are signed in with. After choosing a new library, it becomes the Active Library.

To add additional LIBIDs to an existing user account, contact DOCLINE Support.

7.3 Search Libraries

You can use **Search Libraries** to find the Library Profile of another library and view detailed information about it, whether you are considering them as a lender or are lending to them.

- Library Search is pre-set to filter out libraries that are not DOCLINE participant libraries or that are permanently closed. This can be modified.
- If you do not input any search terms, Search Libraries returns a list of all participating libraries.
- Default Sort is by alphabetical by LIBID.

Libraries Search Terms

Users can input the following search terms:

- LIBID, Institution, or Department Name
- Library Contact
- OCLC Symbol
- Email address

Libraries Search Filters

Users can select these filters to limit results:

- **Print Resources Available**
If checked limits search to libraries that have indicated they can provide loans or copies from print materials
- **EFTS Participants**
If checked limits search to libraries that participate in EFTS. (11.1)
- **Rush Service**
If checked limits search to libraries that offer Rush Service
- **Urgent Patient Care Service**
If checked limits search to libraries that offer Urgent Patient Care Service

Users may also make choices from these additional filters:

- **Region**
Any is default, other options are In My Region, Not in My Region
- **City**
Any is default, City Names listed in DOCLINE Library Profiles may be selected
- **State**
Any is default, individual States or Provinces may be selected
- **Country**
Any is default, individual Countries may be selected
- **Limit to My Library Groups**
If checked limits results to Libraries that belong to the same Library Groups as the user's library
- **Limit to These Library Groups**
Any is default, multiple Library Groups may be selected
- **Routing Table**
Any is default, other options are In My Routing Table, Not in My Routing Table
- **Lending Days**
If checked limits results to libraries that offer lending service on days selected
- **Delivery Methods**
Any is default, options are Article Exchange, Mail, Email, Odyssey, Fax, Pickup, Web PDF
- **DOCLINE Participant**
Participant is default, other options are Non-Participant and Any
- **Open/Closed**
Open is default, other options are Closed and Any
- **Library Type**
Any is default, other options are Hospital, Academic, Public, Other, Federal

7.4 Contacting Other Libraries

You can send a message to another library about a request from within DOCLINE ("Contact Library") or find the ILL Contact information listed in each library's profile. Outgoing **Contact Library** emails are addressed to the recipient library's "Delivery Email Address" (See page 39) and to each ILL Contact listed in their Library Profile (See page 49).

STEPS

To contact another library about a request, use Lend or Borrow Search (as appropriate) to locate the specific request, then

1. In the Search Results request display, the Contact Library **envelope icon** appears to the right of the Lender or Borrower Name
2. Click the **icon** to display the "Contact Library" form

The form is populated with the request number as well as To*: and From: information

3. Add your message
4. Edit email address in the "Your Contact" section (the address cc:ed on the message), if desired
5. Complete "I'm not a Robot" captcha
6. Click **Send Message**

NOTE: copies of outgoing emails are not retained by DOCLINE

7.5 Closing Permanently

If your organization has decided to merge two libraries or to close your library, and it will no longer have a collection or staff, please contact DOCLINE Support to have the Library Profile set to "Closed" in DOCLINE.

Users may want to save copies of "Journal Holdings Reports" or Request statistical Reports before the library is closed and user accounts are disconnected.

As part of the closure process, user accounts are de-linked from library records and library holdings are permanently deleted. EFTS libraries need to close EFTS accounts separately (see 11.6).

8 Journals

Holdings input and update is the primary function of the Journals module. Libraries should maintain up to date Journal Holdings in DOCLINE to prevent requests for journal titles, formats, or years that they no longer own from routing to them, as well as to prevent erroneous alerts about owned journals during the borrowing process.

Searching Journals to locate potential lenders is not recommended. Users should rely on Automated Routing for the most efficient borrowing and lending, unless resubmitting a request that has previously retired unfilled.

8.1 Journals Overview

The Journals that are available in DOCLINE originate with bibliographic records in [NLM's catalog](#). If your library owns a title that is in scope but is not in DOCLINE, you may [request that NLM catalogers add a bibliographic record](#) (<https://support.nlm.nih.gov/knowledgebase/article/KA-03617/en-us>) so that you can add DOCLINE holdings.

Participating libraries subscribe to and maintain holdings for at least ten (10) DOCLINE journals (those with bibliographic records in NLM's catalog) from which they can fulfill ILL requests.

At the Holding Library level, this *bibliographic information* displays along with the journal **Title**.

- Place of Publication
- Publisher*
- OCLC Number
- Continuation Notes: (if present) *
- Dates of Publication
- ISSN(s)
- NLM Unique ID

NOTE: Except for Publisher and Continuation Notes, the same bibliographic information displays on each Journals Search results card.

8.2 Holdings Record Elements

Format

A library may report owning a journal in multiple formats but cannot have more than one record with the same format. The default format for new Holdings Records is Electronic. There are only three possible formats in DOCLINE 6.

Originally, DOCLINE holdings statements were assigned formats based on ANSI/NISO Z39.71-2006 (R2011) - Holdings Statements for Bibliographic Items. Existing Holdings imported into DOCLINE 6.0 (October 2018) were assigned to the three formats listed below:

- **Print:** any Text format (T*)
- **Electronic:** any Computer format (C*)
- **Other:** any remaining ANSI formats

These codes correspond to the codes defined in the 007 field of the USMARC Bibliographic Format.

NOTE: As of 2018 DOCLINE holdings records no longer are stored in a way compatible with USMARC, nor have they been converted to [BIBFRAME](https://www.loc.gov/bibframe/) (<https://www.loc.gov/bibframe/>). Once NLM has moved to a new integrated library and discovery system, as well as fully moved to multiple-record cataloging methodology that meshes better with other institutions' cataloging practices, holdings records may be modified.

Currently Received

Currently Received indicates that your library still subscribes to the journal. It is selected by default for new Holdings Records. If 'Currently Received' is selected, then the holdings ranges cannot contain an End Date or End Volume. When deselected, user is prompted to enter ending date or volume number.

If the library reports they currently receive a title, their holdings display as open-ended, for example:

- v.211(1970)-
- v.153(1960)-

instead of v.241(1978)-312(2014) or 'closed' holdings.

My Access Includes

Your library's subscription licenses for electronic journals must permit interlibrary loan or you should not report owning the title in DOCLINE. Electronic format holdings access may also include:

- Embargo Period (Months)
- E-Pub Ahead of Print
- Supplementary Data

Other aspects of electronic journals licensing may limit or expand access, over and above standard subscription license terms.

DOCLINE 6.x request routing takes embargoes into consideration when matching certain PMID requests to lender holdings. Embargoes are NOT considered by the system when alerting the borrower that they own the requested title.

NOTE: Embargo Period must have a value of zero, even if not selected.

Retention Policy – Permanent or Limited

This setting Indicates whether library retains every issue received (Permanent) or only keeps the latest # months, years, or editions of a journal (Limited). (required)

If the retention policy is **Permanently Retained**, users may enter the following:

- Begin Volume, End Volume

- Begin Year, End Year

Multiple date ranges, rows or time spans may be used to represent holdings with the most accuracy.

Currently Received holdings cannot be saved with if they include a final End Year or Volume

NOTE: Requests are matched to lenders' holdings based on reported Volume **OR** Year

If the retention policy is **Limited Period Only**, (Retaining the Latest*), users select

- Retention Period Type
 - Months
 - Years
 - Editions

DOCLINE's routing algorithm interprets months held (if less than 12) as "this year" and editions held as years held. For example:

- Latest 1 year or 1 edition is interpreted as "this year"
- Latest 2 years or Latest 2 editions are interpreted as "this year and last year"
- Latest 12 (or fewer) months are interpreted as "this year"

The number of months held is divided by 12 to calculate the years held; remainder months are dropped. For Example:

- 36 months are interpreted as "this year and the preceding 2 years"
- 24 months are interpreted as "this year and last year"
- 33 months would be interpreted as this year and last year

Limited Retention must have a value of zero, even the option is not selected.

8.3 My Journals

The **My Journals** menu option is a pre-filtered search, limited to journals for which the library has holdings records in DOCLINE.

Changing Holdings Format

STEPS

1. Choose **Journals>My Journals**
2. Input title or other information about the journal you want to modify
3. Click **Search**
4. In the search results, select the journal you want to add by clicking the title link
5. Click the **Edit Holdings** button
6. Change the 'Format' to correct format

7. Click **Update Holdings**

NOTE: "Limited Retention Period" and "Embargo Period" must both have a value of zero, even if they are not selected.

Adding a NEW Journal to my Journal Holdings

STEPS

1. Choose **Journals>Search Journals**
2. Input title or other information about the journal you want to add
3. Click **Search**
4. In the search results, select the journal you want to add by clicking the Title link
5. Click the **Add Holdings** button
6. Complete the required information in the form ('Currently Received' and 'Format' of Electronic is automatically filled in, but may be modified)
7. Click **Create Holdings**

Adding ranges to existing Holdings records

STEPS

1. Choose **Journals>Search Journals or My Journals**
2. Input title or other information about the journal you want to edit
3. Click **Search**
4. In the search results, select the journal you want to edit by clicking the Title link
5. Click the **Edit** button on the holdings record you want to update
6. De-select 'Currently Received' checkbox, *temporarily*
7. Complete existing date ranges with both begin and end Volumes or Years
8. Click **Update Holdings**
9. Click the **Edit** button again on the holdings record you are updating

New rows will display

Repeat steps 7-9 as needed to accurately represent holdings

10. Select 'Currently Received' checkbox if you still subscribe to this journal

Adding "Gap Years" Holdings ranges

STEPS

1. In the **Journals Search** or **My Holdings**, input title or other search term to locate journal
2. Click **Search**
3. In the search results, select the journal you want to edit by clicking the title link

4. Click the **Edit** button on the holdings record you want to update. End year and beginning year cannot overlap or be the same on two different rows.

Changing Holdings from Permanent to Limited Retention

To change a Holdings Record indicating "permanently held" that includes years/volumes ranges, into a "Limited Retention" holdings record, do the following.

STEPS

1. Select the radio button for "**Limited Period Only**" instead of "Permanently Retained"
2. Select the **DELETE** checkbox at the right end of holdings ranges that contain volume/year values.
3. Input the number of years (or other unit) your library keeps
4. Choose unit (months, years, editions)
5. Click **Update Holdings** button at the bottom of the page

Recording Holdings Outside Publication Dates

Sometimes libraries find it necessary to report holdings that fall outside a journal's official publication dates. For example, if a journal title changed, but there is not an additional bibliographic record for the newer (succeeding) title or the prior (preceding) title.

Users are warned if they input and attempt to save holdings dates that do not fall within the publication dates listed in the selected bibliographic record.

To continue with dates that are outside the stated publication dates for the journal, select the "**Ignore warnings for Retention Ranges outside of the Journal's Publication Dates**" option that appears directly beneath the journal bibliographic data, before selecting **Update Holdings** to save the record.

Journals Holdings Import/Export

DOCLINE provides a way to download a list of your journal holdings and make batch changes.

Export

- The Export side of the page is where you can download a list of your current holdings.
- It also provides the date and record of up to 5 previous export files under "Successfully completed exports."
- Note that these will only be available for the past 7 days, and you may delete them yourself at any time.
- **Pending Export** files may take some time depending on the number of holdings.
- And if you encounter any issues, they will be recorded under **Export Errors**.

STEPS

1. Choose **Journals>Import/Export Holdings**
2. Click **Build Export File**
3. Once the file has been created, we will be shown a "Success!" page saying your export file is ready or has been queued depending on the number of holdings.
4. Click on **Go back to holdings import/export dashboard** button.
5. Click on **Download CSV** at the top of the list. Queued exports will run within an hour.
 - This will download a comma-separated values (or CSV) file to your computer.
 - Information about your holdings include the record type, title, NLM Unique ID, volume and year range, and ISSN, among other data.
 - Batch changes can be made to this file for import into DOCLINE.
 - You can delete or add holdings under the Action column.
 - After making some updates, re-save the file.

Delete or Add

- The **Action** column is where you specify the action required (e.g. **Delete** or **Add**).
- You can indicate the changes to your Journal Holdings under the **Action** column to the left of the **Holding** value. You do not have to enter an Action for Range rows.
- Each column field, if it does have data, must be formatted.
- If the data in the cell doesn't match the requirements (for example, Dlt instead of Delete), your spreadsheet import will show you the error.

Edit Volume and Date Range

- In order to edit a holding, you will first need to **Delete** then **Add**. This can be done by copying/inserting desired rows. First delete old holdings, then add the new updated holdings. If you don't need to update something, you can leave the action blank.

| | A | B | C | D | E | F | G | H | I | J |
|---|--------|-------------|--------|-------------------|---------------|-----------------|--------------|------------|------------|----------|
| 1 | action | record_type | libid | serial_title | nlm_unique_id | holdings_format | begin_volume | end_volume | begin_year | end_year |
| 2 | | HOLDING | TXUYRA | A Medical Journal | NLM_123456789 | Electronic | | | | |
| 3 | DELETE | HOLDING | TXUYRA | A Medical Journal | NLM_123456789 | Print | | | | |
| 4 | | RANGE | | | | | | | 2000 | 2005 |
| 5 | | RANGE | | | | | | | 2006 | 2021 |
| 6 | ADD | HOLDING | TXUYRA | A Medical Journal | NLM_123456789 | Print | | | | |
| 7 | | RANGE | | | | | 1 | 18 | 2006 | 2010 |
| 8 | | RANGE | | | | | 20 | 45 | 2012 | 2021 |

Import

STEPS

1. Choose **Journals>Import/Export Holdings**
2. On the Import side of the dashboard, click **Choose File** to select our CSV file we just saved.
3. Click on **Import/Update Holdings with CSV**.
4. Once DOCLINE has imported your file, you should see a Success page.
5. Click on **Go back to holdings import/export dashboard** button
 - Note that we have a new entry under “Successfully Completed Imports” that displays the date imported and allows you to download the CSV file again.
 - Import records are also kept for 7 days. Up to 5 uploads can be displayed and may be deleted manually at any time.
 - Pending Imports are currently being processed and will complete within an hour. This may show if you have a large number of holdings.
 - When you Import a CSV file and you get an “Import Failed” screen or the queued import file has failed, review the error message displayed. The row where the error occurred along with the cause of the error will be displayed.
 - Your spreadsheet must contain all of the original column headers as your **Export File**. If your spreadsheet does not contain these fields, or if Journal Holdings in your spreadsheet are missing these values, your spreadsheet will not import successfully.

Adding Holdings for Titles not in DOCLINE

If your library owns a title that is in scope but is not in DOCLINE, you may [request that NLM catalogers add a bibliographic record](https://support.nlm.nih.gov/knowledgebase/article/KA-03617/en-us) (<https://support.nlm.nih.gov/knowledgebase/article/KA-03617/en-us>) so that you can add DOCLINE holdings. You can see the criteria for journal additions, here: https://www.nlm.nih.gov/tsd/serials/nlm_locatorplus_add_mod_for_serhold.html

Reviewing and Combining Duplicated Format Holdings Records

Background: Why are there duplicate records?

DOCLINE offers only three Holding Formats (Electronic, Print, Other), where it used to have dozens. The result is that some libraries now have two (or more) holdings records with the same format, after the holdings were imported into DOCLINE 6 from the old system and assigned one of the three remaining formats.

With the new Holdings Import/Export feature, the system now allows only *one record in each format*, so duplicates need to be reviewed, combined, and deleted.

Examples:

Electronic Format: If a library used to report Online holdings, and CD-ROM holdings of the same title, they'd now have two different 'electronic format' holdings records, with different ranges of access.

Other format: If a Library had two different holdings records for microfiche and microfilm in DOCLINE 5, they now have two "Other" format records in DOCLINE 6, which include different coverage.

Comparing and Combining Holdings Records in Import/Export

STEP 1

1. Export file of your holdings
2. For each duplicate Journal Title, compare ranges in Holdings
3. Review the start and end dates, or start and end volumes, in both records then insert the correct data into new replacement range(s)
 - a. Create new ranges with the longest time span coverage (or greatest volume number span)
 - b. Choose open holdings record (no End Vol or Year) if one is open and the other closed

| | A | B | C | D | E | F | G | H | I | J |
|---|--------|-------------|--------|-------------------|-------------------|-----------------|--------------|------------|------------|----------|
| 1 | action | record_type | libid | serial_title | nlm_unique_id | holdings_format | begin_volume | end_volume | begin_year | end_year |
| 2 | | HOLDING | TXUYRA | A Medical Journal | NLM_1234567890123 | Print | | | | |
| 3 | | RANGE | | | | | | | 2006 | 2021 |
| 4 | | HOLDING | TXUYRA | A Medical Journal | NLM_1234567890123 | Print | | | | |
| 5 | | RANGE | | | | | | | 2000 | 2005 |

4. Input the word **ADD** in the Action column for the new combined record
5. Save this CSV for step 3

| | A | B | C | D | E | F | G | H | I | J |
|---|--------|-------------|--------|-------------------|-------------------|-----------------|--------------|------------|------------|----------|
| 1 | action | record_type | libid | serial_title | nlm_unique_id | holdings_format | begin_volume | end_volume | begin_year | end_year |
| 2 | ADD | HOLDING | TXUYRA | A Medical Journal | NLM_1234567890123 | Print | | | | |
| 3 | | RANGE | | | | | | | 2000 | 2005 |
| 4 | | RANGE | | | | | | | 2006 | 2021 |

STEP 2

1. Choose **Journals>My Journals**
2. Input title or other information about the journal you want to modify
3. Click **Search**
4. In the search results, select the journal you want to modify by clicking the title link
5. Click the **DELETE** button for all duplicated holdings of the same format

STEP 3

1. Go to **Journals>Import/Export Holdings**
2. Upload the CSV file you saved earlier by selecting **Choose File**
3. Select the **Import/Update Holdings with CSV**

8.4 Journals Search

Finding Titles

Use Journals Search if you want to add holdings for new titles or when you want to populate a Journal Unique ID request form when the journal is known, but the article lacks a PMID.

Users can search for journal titles by Title, NLM Unique ID (NLMUI), ISSN(s) or OCLC number.

Once the desired journal is found, click through the journal title link to see the libraries that own it and the details of their holdings.

NOTE: Titles must be entered exactly as shown in NLM's catalog, or search will not return results. For example, "and" cannot be substituted for "&" or vice versa. If the title has variants, and a unique ID is not available, users may want to use the more robust search capabilities of [NLM's catalog](https://catalog.nlm.nih.gov/discovery/search?vid=01NLM_INST:01NLM_INST) (https://catalog.nlm.nih.gov/discovery/search?vid=01NLM_INST:01NLM_INST).

Holdings Search Filters

Journal Search may also be used to find libraries that report owning a particular journal, if automated routing has been unsuccessful or in circumstances when you need to locate an active lender immediately. In most circumstances, users should rely on automated routing to keep request fulfillment speedy and efficient for borrowers and lenders, and to ensure that requests are distributed randomly among potential lenders.

The Holdings Filters panel does not display until a single journal has been selected. Once the desired journal record is located, click through [the Title link](#) to see the libraries that report owning it, and for additional search filters.

Holdings Filters may be combined; for instance, to find a library owning a specific year, and in the required format. The following filters are available at the holdings level:

- Year
- Volume
- Format
 - Any
 - Electronic
 - Print
 - Other
- License:
 - Embargo
 - Any
 - Has Embargo

- No Embargo
 - Limit to (libraries reporting) E-Pub Ahead of Print
 - Limit to (libraries reporting) Supplementary Data
 - Limit to Libraries that offer Service Level
 - Any
 - Urgent Patient Care
 - Rush
 - Limit to My Library Groups
 - Limit to these Library Groups (multi-select, all available groups)
 - Not My Routing Table (unselected by default, returns all libraries that report owning a title. After unsuccessful routing borrowers searching for new lenders should select this option.)

Sorting Search results

Options for sorting the list of libraries that report owning a title are included beneath Holdings Filters. The default sort is by LIBID which results in libraries listed by state.

9 Reports

Request statistics reports, Journal Holdings reports, and EFTS Lend reports (if applicable) are all available via this menu option.

9.1 EFTS Manual Billing File

The EFTS manual billing report is available to libraries that participate in EFTS. The spreadsheet it produces may serve as an offline record of filled EFTS requests. Users may set the date range for the report output. Requests are retrievable for 150 days after completion (filled or unfilled). Requests included are limited to borrowers who are EFTS participants. However, reports will only include requests filled for borrowers who are EFTS participants **at the time the EFTS Manual Billing report is produced. File is NOT uploadable.**

9.2 Request Statistical Reports

Request reports provide data that enables users to make informed choices about their ILL service, ILL partners, and journal subscriptions. Use DOCLINE reports to optimize lending and borrowing, and to make evidence-based collection management decisions.

- To improve speed and efficiency getting articles from other libraries, review any low performance statistics for lenders in report Borrow tables. Low fill rates and slow turnaround times may indicate that you should adjust your Automated Routing Table to include lenders

with better performance statistics, update your 'Do Not Route to' List, or may point to over reliance on 'Direct to Library' routing.

- To improve your speed and efficiency providing articles to other libraries, review any low performance statistics for borrowers in report Lend tables. Low fill rates may indicate that your library's journal holdings need updating, especially if many requests are being rejected as 'Not Owned'. Low fill rates may also result if Borrowers rely on 'Direct to Library' routing. If your library has a high rate of Not Receipted requests, turning on Lend Alert emails can help reduce the number of Lend requests your library misses.

DOCLINE offers monthly total (summary) request statistics, detailed reports of quarterly request activity

NOTE: Monthly, Quarterly, and Annual **request totals will not always match** because each report type employs different filters.

Only requests **completed** (filled or retired) within the report period are included in report calculations, regardless of when the request was originally created.

Monthly "Activity Summaries"

The **Monthly Activity Summary** allows users to view summary statistics and performance data about Lend and Borrow requests completed during previous calendar months.

The Activity Summary data is refreshed every month. The prior two months' summary data remains available. While earlier data is not retained, users may be able to change the month and year in report URLs in their browser address bar to view earlier summaries.

Libraries using Activity Summary data for monthly statistics reporting should copy and paste the table data into a local spreadsheet for future reference.

The elements of the Activity Summary reports are described in the tables below.

Activity Summary: Lend Request Statistics, Performance Tables

| <i>LEND Request Statistics</i> | |
|---------------------------------------|---|
| Routed to Lender | The number of requests that routed to your library to be filled. |
| Cancelled Before Receipt | The number of requests that routed to your library that were cancelled by the borrower before Lend receipt. |
| Expired Before Receipt | The number of requests that routed to your library that expired due to a borrower "Need by Date" before Lend receipt. |
| Removed for Non-Receipt | The number of requests re-routed away by Time-Triggered Actions because your library did not receipt them within allotted time. |

| | |
|--|--|
| Received | The number of requests that were received by your library. |
| Filled | Of Received Requests, this indicates the number your library updated as Filled. |
| Not Filled | Of Received Requests, this indicates the number your library did not Fill. |
| Rejected | Of Not Filled Received Requests, this indicates the number your library updated with Reject Reasons |
| Removed for Non-Action | The number of Received requests re-routed away by Time-Triggered Actions because your library did not update the requests as 'Filled' or 'Rejected' within allotted time. |
| <i>*Exceptions</i> | Requests with incomplete or invalid data that cannot be accurately categorized. Seldom displays. |
| LEND Performance Statistics[‡] | |
| Library Fill Rate | The percent of Received Requests that the lender updated as Filled. |
| Days to Process (Filled) | "Turnaround time", the average time it took for your library to update lend requests as filled. The number is shown in one-hundredths of a day based upon calendar days. 0.00 indicates Lender's average turnaround time for the reporting period is less than 15 minutes. |
| Days to Process (Not Filled) | "Turnaround time", the average time it took for your library to update lend requests as not filled or to be rerouted away for non-activity by the lender. The number is shown in one-hundredths of a day based upon calendar days. |

[‡] Lender Performance Statistics (Fill Rate, Days to Process: Filled) display to other libraries in the Lend Information portion of your Library Profile.

Activity Summary: Borrow Request Statistics, Performance Tables

| | |
|----------------------------------|---|
| BORROW Request Statistics | |
| Requested | The number of requests placed by your library to be filled by other libraries |

| | |
|--|--|
| Filled | The number of your library's requests that were updated as filled by lenders |
| Not Filled | The number of requests placed by your library that retired unfilled. |
| <i>BORROW Performance Statistics*</i> | |
| Library Fill Rate | The percent of Received Requests that lenders updated as Filled. |
| Days to Process (Filled) | "Turnaround time", the average time it took for lenders to update your requests as filled in DOCLINE. The number is shown in one-hundredths of a day based upon calendar days. |
| Days to Process (Not Filled) | "Turnaround time", the average time it took for your requests to retired unfilled. The number is shown in one-hundredths of a day based upon calendar days. |

*low performance statistics in your Borrow table may indicate that your routing table needs to be updated to include lenders with better fill rates and turnaround times.

Quarterly "Detailed by Library Reports": Lend and Borrow

The quarterly Detailed by Library reports provide the total numbers of requests per quarter, broken down by request activity, grouped by library (Lender or Borrower), state/province, and country; as well as by service type: copy/loan. There are both Lender and Borrower reports, which include performance statistics.

Report Frequency:

Reports are posted quarterly.

Report Availability:

Users have access to the eight (8) most recent quarterly reports. When a new report is generated it will replace the oldest of the listed reports. Users wanting to retain data should save reports locally as the older report will no longer be available via DOCLINE once a newer report is posted.

Report Contents:

The request activity and status are grouped and reported by

- LIBID of Lender/Borrower
- State
- Country

Statistics Reported

Totals:

- Number of requests
- Number of Receipted requests
- Number of Requests Filled
- Percent of Requests Filled
- Number of Requests Not Filled
- Number of Requests Not Receipted
- Days to Process – Filled
- Days to Process – Unfilled
- Number of Filled Requests broken down by Copy/Loan
- Number of Not Filled request broken down by Copy/Loan

Annual “Detailed by Journal Reports”: Lend and Borrow

The annual Journal Request Reports, **Lend: Titles Filled** and **Borrow: Titles Requested**, provide a list of journal titles ranked by the number of times each journal has been requested during the report period.

- Only requests **completed** (filled or retired) within the time period are included in the report
- This report counts only requests for material from journals that are in NLM’s catalog and that have an NLM Unique Identifier
- Cancelled requests are not included

This report data is useful to support decisions regarding journal subscriptions and copyright compliance.

Report Frequency:

-Cumulative reports are posted annually for two time periods.

- January 1 through December 31 of the same year (“Calendar Year”)
- July 1 through June 30 of the following year (“Academic Year”)

Report Availability:

Users have access to the two (2) most recent annual reports. When a new report is generated it will replace the oldest of the listed reports. Users wanting to retain data should save reports locally as the older report will no longer be available via DOCLINE once a newer report is posted.

Report Contents:

Journal Bibliographic Information

- Journal Title
- NLM Unique ID
- ISSNs
- Publication Dates

Statistics Reported

Totals:

- Number of requests
- Number of filled requests
- Number of titles requested

Subtotals by Title:

- Times Requested
- Number Filled
- Article Year (Filled/Requested): broken down by article year and final request status

9.3 Journal Holdings Reports

Libraries may wish to run a Journal Holdings by Library Report as a tool for holdings maintenance activities. The user's active library is the report default LIBID.

The Holdings Report page offers the user the option to build a report and displays the status of pending or completed reports.

- Reports are generated every hour and are run in the order they are submitted
- Holdings reports are current as of the time they are run
- If there are multiple completed reports, the first report in the list is the most recent
- Each report is deleted from the system one week after it has been created, even if the report has not been viewed

Holdings by Library Report

This report lists all holdings for a single library. To see more information about the elements of each holdings record, refer to the following section.

STEPS

To generate your report,

1. Choose **Holdings Reports** from the **Reports** Menu
2. Select the **Build Report** button

The queued report displays under **Pending Reports**

When complete, report displays in the **Completed Reports** card with a **Download CSV** button

An *Open* or *Save* system dialog opens for downloading the report file (.csv format)

Save downloaded report

The report is sorted by journal title. Columns for every field are included, even if the value is null, empty or zero for your library.

Included columns are listed below. Additional information on Holdings Records elements may be found in section [8.2](#).

- LIBID
- Serial Title
- NLM Unique ID
- ISSN
- Holdings Format
 - if multiple formats, each has a record/row
- Holdings
 - Currently received ("open") holdings display with a hyphen following a Begin Year and/or Volume (for example: v.1(1975)-)
 - Not currently received (no longer subscribe or license) ("closed") holdings will have an end volume or year after the hyphen (e.g. v.3(2000)-13(2013)).
- Retention Policy
 - Permanent or Limited – Library retains every journal issue received or discards older issues and only retains a limited number.
- Limited Retention Period
 - number
- Limited Retention Type
 - months
 - years
 - editions
- Embargo Period
 - Number of Months (zero for print and other, zero for electronic if license terms do not include an embargo).
- Access to Epub Ahead Print indicator

- Access to Supplementary data indicator
- Last Modified
 - Date record was last modified

NOTE: OCLC number is not included because existing NLM bibliographic records for serials include OCLC numbers for the corresponding OCLC print record, almost exclusively. This is due to NLM's single bibliographic record cataloging approach prior to the implementation of BIBFRAME.

Using Report in Excel (optional)*

To take advantage of data formatting options (Figure 2), open file in Excel.

STEPS

1. Save your downloaded Journal Holdings Report CSV file
2. In Excel, open a new blank spreadsheet
3. From the *Data* tab, in the "Get & Transform Data" group, click **From Text/CSV**
4. In the *Import Data* dialog box, locate and double-click the text file that you want to import, and click **Import**
5. In the preview dialog box, choose **65001: Unicode (UTF-8)** from the File Origin pull-down in the top left
6. Select **Load**
7. Save your new spreadsheet of Holdings data

*These step-by-step instructions refer to Microsoft Excel, but you may use another spreadsheet application.

Figure 2: Formatted Report in Excel

| | libid | serial_title | nlm_unique_id | issns | holdings_format | holdings |
|----|--------|---|---------------|---|-----------------|--|
| 1 | MDUXYZ | 100 top hospitals : clinical research program | 100970425 | | Electronic | 1998-2000 |
| 2 | MDUXYZ | Handbook of clinical neurology | 0166161 | 0072-9752 (Print) | Print | |
| 3 | MDUXYZ | Headache | 2985091R | 0017-8748 (Print), 1526-4610 (Electronic) | Electronic | 1901-1902, 1907-1911, 1961-1991, 1993-1999 |
| 4 | MDUXYZ | JAMA | 7501160 | 0098-7484 (Print), 1538-3598 (Electronic) | Electronic | |
| 5 | MDUXYZ | Jama (Korean Ed.) | 9890467 | | Electronic | |
| 6 | MDUXYZ | The Library quarterly | 57630690R | 0024-2519 (Print) | Electronic | 1931- |
| 7 | MDUXYZ | Migraine news update | 9890806 | 1086-0738 (Print) | Electronic | 1997-1999, 2002- |
| 8 | MDUXYZ | Migraine news update | 9890806 | 1086-0738 (Print) | Print | v.3(2000)-13(2013) |
| 9 | MDUXYZ | Pain | 7508686 | 0304-3959 (Print), 1872-6623 (Electronic) | Electronic | 1985- |
| 10 | MDUXYZ | Pain | 7508686 | 0304-3959 (Print), 1872-6623 (Electronic) | Print | v.1(1975)- |
| 11 | MDUXYZ | Vet on-line | 9806554 | 1360-1962 (Electronic) | Print | |

9.4 Routing Table Reports

Routing Table reports list the borrowers that have your library as a potential lender in their routing table cells. Use Routing Table reports to discover in which cell others have placed your shared Library Groups (Automated Routing), or as one of nine lenders in their Manual Routing table.

Automated Routing Table Report

This report lists the borrowers that have your library as a potential lender in one of the cells of their Automated Routing Table.

- For individual borrowers, each report row includes the routing cell number, their LIBID and library name.
- Library Group rows display the routing cell number, the code and name of the Library Group, and how many of the total group members list the group within the cell.
- Library Groups rows can be expanded to see which of the members have placed it within the cell.
- LIBIDs are hyperlinked to full Library Profiles.

Report Frequency:

On Demand

Report Availability:

Single-use (current as of date/time created))

Manual Routing Table Report

This report lists all the borrowers that have your library as one of nine default potential lenders in their Manual (M/A/N) Routing Table cells.

- Some borrowers use manual routing if they are unfamiliar with other requesting methods that require PMIDs or NLM UIs.
- Contact Library can be used to reach out to borrowers that rely on manual rather than holdings-based routing.

Report Frequency:

On Demand

Report Availability:

Single-use (current as of date/time created)

10 Library Groups

Library Groups are available in the system to make it easier for group members to route requests to one another without having to individually add and maintain group members in their own routing tables.

Groups may be formed by a professional association; around a medical specialty, e.g., nursing or pediatrics; or focused on a geographic area or another shared trait, such as federal libraries. These groups may offer services or other resource sharing opportunities to members beyond reciprocal ILL.

Library Group members agree to provide each other no charge or low charge ILL fulfillment. Group charges may not be edited by members but are part of the Library Group record itself.

New Library Groups may be added to DOCLINE if the proposed group has at least ten (10) members. Groups that were added to the system prior to October 2018 may have fewer than ten members. Organization and management of groups, which may have websites, chairpersons, or contacts, is external to DOCLINE.

10.1 Finding Group Information in DOCLINE

You can use **Libraries Search** to view Library Group membership. There are two Library Group filters:

- **Limit to My Library Groups**
If checked limits results to Libraries that belong to the same Library Groups as the user's library
- **Limit to These Library Groups**
Any is default, multiple Library Groups may be selected

These same two filters are also available in **Journal Holdings** search.

Library Group membership displays across the system in multiple places.

- In **Borrow** and **Lend**
 - All the Borrowers' Library Groups are listed on Request Receipts
- In **Library Profiles**, Groups are available
 - to add to routing cells: Borrow Information>Automated Routing Table Cell>Edit.
Only Library Groups of which you are a member are available to add.
 - to view by potential borrowers: Lend Information>Library Lending Groups
- In **Journals Search**, at the Holdings level (*after clicking through title link*), Library Group filters are visible:
 - Limit to these Library Groups selector (lists all available groups)
 - My Library Groups selector

10.2 How to Add, Join or Leave a Library Group

Adding a Library Group to DOCLINE, modifying existing group information, and adding or deleting member libraries are Administrator activities. Contact your [RML's DOCLINE Coordinator](#) for help.

If you join or leave a Library Group, update your Automated Routing Table to reflect the change. Refer to "Updating your Automated Routing Table" for more details.

11 EFTS

11.1 What Is EFTS?

[The Electronic Fund Transfer System \(EFTS\)](https://efts.mlanet.org/account/login) (<https://efts.mlanet.org/account/login>) is a transaction-based electronic billing system for interlibrary loan (ILL) and document delivery charges. It is maintained by the Medical Library Association in support of resource sharing among the medical library community. It substantially reduces the costs incurred with paper-based billing and payment.

11.2 How Does EFTS Work?

For libraries that choose the option, DOCLINE ILL transactions are automatically transmitted daily to EFTS for participant libraries. EFTS libraries log into EFTS to review filled requests, to bill borrowers for non-reciprocal lending requests, or to manage their accounts and configuration.

11.3 Who Uses EFTS?

Libraries using DOCLINE and others in The Network of the National Library of Medicine (NNLM) are encouraged to join EFTS.

11.4 Why Use EFTS?

EFTS reduces the need to create invoices and to process reimbursement checks for interlibrary loans between participants. It also:

- Reduces costs associated with interlibrary loan and improves cash flow
- Assists with collection development monitoring by tabulating borrowing costs
- Reduces human error and increases efficiency
- Provides management reports

11.5 How Can My Library Join EFTS?

Visit the [MLA-EFTS website \(https://www.mlanet.org/efts/configuration\)](https://www.mlanet.org/efts/configuration) for more information or email EFTS Support at MLA: efts@mail.mlahq.org.

11.6 How Does My Library leave EFTS?

If you will no longer be participating in DOCLINE, please let [DOCLINE Support \(https://support.nlm.nih.gov/support/create-case/\)](https://support.nlm.nih.gov/support/create-case/) know so that your library can be deactivated for lending. Then, connect with [EFTS Support \(efts@mail.mlahq.org\)](mailto:efts@mail.mlahq.org) to settle your EFTS accounts.

11.7 How Can I Get Help With EFTS?

For questions and assistance, please contact [EFTS Customer Support \(efts@mail.mlahq.org\)](mailto:efts@mail.mlahq.org) at MLA, or call +1 312.728.3415 from 9am to 5pm (Chicago, USA), Monday through Friday.

12 Third-Party ILL Software and DOCLINE

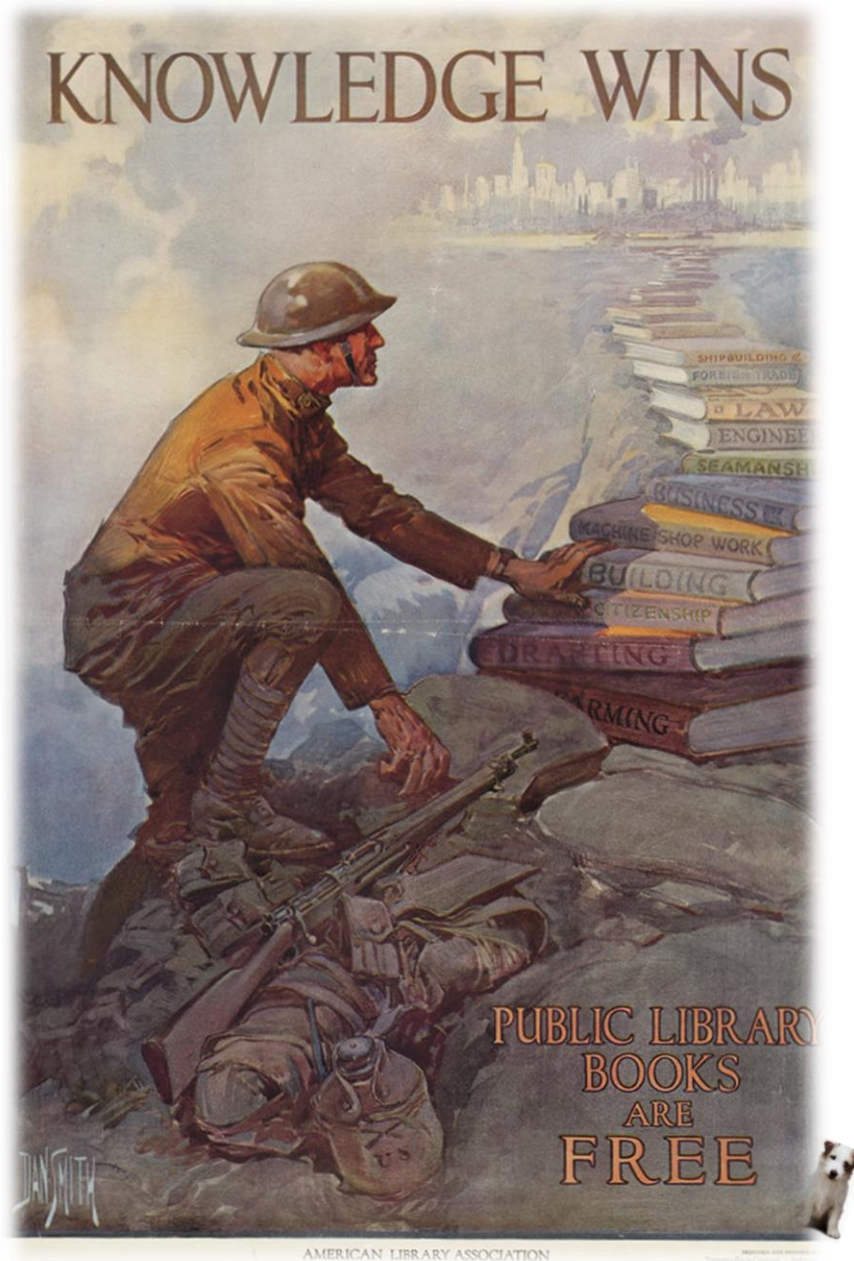
Some libraries may use additional ILL processing or management software applications such as QuickDoc/QDPortal, CLIO, ILLiad, and Relais. These users interact with DOCLINE via their ILL application rather than accessing the DOCLINE system with a web browser directly.

Vendors are provided access to upcoming changes in advance in order to minimize interruption of ILL services for our mutual users.

If there appear to be integration difficulties between your library's ILL system and DOCLINE, isolate or circumvent the issue by logging directly into DOCLINE with a web browser. NLM cannot assist with integration of DOCLINE data into other applications.

Please contact your vendor for further assistance with your third-party ILL software.

Please send user manual edits or suggested additions to
DOCLINE Support via the [NLM Support Center](#).



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