

DOCLINE | Systems Update

NAHSL Conference
October 2003



NN/LM – NER
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DOCLINE | Systems Update

- ❖ DOCLINE 2.0 Arrives**
- ❖ ISO/ILL Compliance**
- ❖ Serial Batch Update Programs**
- ❖ Latest in LinkOut**

DOCLINE 2.0 Arrives



**Hear Ye! Hear
Ye!**

**NLM is expected to
release**

**DOCLINE 2.0 very soon,
before end of this year,**

2003.

A DOCLINE

PERSPECTIVE

DOCLINE - first launched via Telnet	Mar 1985
DOCLINE – intro to Web	2000
DOCLINE 1.3	Sep 2001
DOCLINE 1.4	Sep 2002
DOCLINE 1.5	Mar 2003
DOCLINE 1.5.1	Apr 2003
DOCLINE 1.6	Jun 2003
DOCLINE – Web redesign	2003

Rationale for Redesign

- ❖ **To meet NN/LM Network needs & wants**
- ❖ **To meet NLM needs & wants**
- ❖ **To meet software & technology needs**
- ❖ **To meet demands in the ever-changing world of ILL and document delivery**

Goals of Redesign

- ❖ Increase user efficiency and control
- ❖ Decrease learning / re-learning curve
- ❖ Eliminate inconsistencies
- ❖ Increase visual appeal
- ❖ Improve “Help” documentation
- ❖ Utilize new technology
- ❖ Add requested enhancements

Redesign Process

- Step 1. Conduct review of screens**
- Step 2. Design system**
- Step 3. Conduct user acceptance tests**
- Step 4. Finalize design**
- Step 5. Develop system (programming)**
- Step 6. Test system**
-  **Step 7. Preview software**
-  **Step 8. Release software**
-  **Step 9. Review, clean up data**

Preview Schedule

Step 7 - Preview Software

❖ RML Testing

**Monday, Oct 20th - Friday, Nov
7th**

❖ Network Member Testing

TBA ~ Login Screen

~ DOCLINE-L

~ NAHSL-L

WARNING – ALERT!



**Changes made to your
DOCLINE records
during preview testing
will NOT be applied!**

Release Schedule

Step 8 – Release Software

❖ Primary Release Date

TBA

❖ Alternate Release Date

TBA

Preview Schedule

Step 9 – Review/Clean up data

Since there are major changes to the software, libraries should expect some clean-up and updating, following a final refresh or mapping to **PRODUCTION.**

Major Enhancements

- ❖ **New search limits**
 - My State, My Region, My Routing Table
 - Not My State, Not My Region, Not My Routing Table
- ❖ **Contact / people editing**
 - Ability to list more than one person per role
 - Ability to list more than one role per person
- ❖ **Overhaul of “ILL Charges” screen**
- ❖ **Billing address (Bill to:)**
- ❖ **Easier Routing Table maintenance**
- ❖ **Increased number of M/A/N Map cells**

Current Search Page

 **DOCLINE[®]** *interlibrary loan request routing and referral system*

[REQUESTS](#) [DOCUSER[®]](#) [SERHOLD[®]](#) [LD](#) [HELP](#) [HOME](#) Logoff-TEST-TNUTNK

[Update](#) [Search/View](#)

DOCUSER Search/View

Search in: LIBID Contains AND

Search in: LIBID Contains AND

Search in: LIBID Contains

Only if: AND

Only if:

Display results as: Institution list In order to: View records

Sort order: Records per page: 25

New “Quick Search” Page

DOCLINE® [Help](#) | [FAQ](#) | [Contact Us](#) | [Preferences](#) | [Log Out](#)

[Home](#) [Requests](#) [Serial Holdings](#) **[Institutions](#)** [Loansome Doc Patrons](#) [Admin](#)

[Search](#) [Add](#) [Delete](#) [Manage Groups](#) [Manage Users](#) [Update CAUCLA](#)

Search

Enter keyword(s) in one of the boxes below.

LIBID

[SEARCH](#)

Institution Name

[SEARCH](#)

Contact Name

[SEARCH](#)

[More Search Options](#) ⇄

 **CAUCLA-DEMO**
University of California :: Louise M. Darling Biomedical Library

“More Search” Options

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home | Requests | Serial Holdings | **Institutions** | Loansome Doc Patrons | Admin

Search | Add | Delete | Manage Groups | Manage Users | Update CAUCLA

Search > Search Builder

Build your search by selecting from pulldown lists and filters.

1 Build your search with one or more terms from the pulldown list

Add to Search

2 Narrow your search with Filters

- Delivery Options
- Membership Information
- Services

3 You are searching for...

Library Group equal to **Freeshare**
AND State is equal to **California**
OR
State is equal to **Arizona**

Filters DOCLINE Participant Open Libraries

Edit Search
Edit Filters

SEARCH

 **CAUCLA-DEMO**
University of California :: Louise M. Darling Biomedical Library

Search Filters

- ❖ Default filters applied
 - DOCLINE Library
 - Open Library
- ❖ New filters
 - My Routing Table
 - My Region
 - My State
 - Not My ...
 - Provides color copies

The screenshot shows the DOCLINE search filter interface. At the top, there is a navigation bar with links for Home, Requests, Serial Holdings, Institutions (selected), Loansome Doc Patrons, and Admin. Below this is a search bar with buttons for Search, Add, Delete, Manage Groups, Manage Users, and Update CA/CLA. The main content area is titled "Top Filters - Delivery Options - Membership Information - Services" and contains several filter panels. The "Top Filters" panel has checkboxes for DOCLINE Participant (checked), Open Library (checked), My Routing Table, My Region, My State, Not My Routing Table, Not My Region, and Not My State. The "Membership Information" panel has checkboxes for Federal Library, ISO/ILL Participant, Reports Serial Holdings, Library Level (Primary Access Library, Resource Library, Regional Medical Library (RML), Other), Library Type (Academic, Hospital, Public, Other), and Network Membership (Full Member, Affiliate Member, Non-Member). The "Delivery Options" panel has checkboxes for Delivers via Ariel, Delivers via Email PDF, Delivers via Email TIFF, Delivers via Web PDF, Delivers via Web TIFF, and Delivers via FAX. The "Services" panel has checkboxes for Interlibrary Loan (Fills Rush Requests, Provides Color Copies, Fills International Requests), Loansome Doc (Affiliated Users, Public Users, Unaffiliated Health Professionals, International Library, International Users), and Library Services (MEDLINEplus Consumer Health Library, Affiliated Users, Public Users, Unaffiliated Health Professionals). There are "ADD TO SEARCH" and "CANCEL" buttons at the top and bottom of the filter area.

Updates

- ❖ Data elements reorganized
- ❖ Less segmentation of data
- ❖ Ability to see similar data together
- ❖ Eliminates “hidden” data
- ❖ Billing address

The screenshot shows the DOCLINE web interface for updating the address of CAUCLA (University of California, Los Angeles). The page is titled "Update > Address" and includes a navigation menu with options like Home, Requests, Serial Holdings, Institutions, Loansome Doc Patrons, and Admin. The main content area is divided into three sections: Institution Address, Document Delivery Address, and Billing Address. Each section contains fields for Institution, Library, Street, City, State/Province, Zip/Mail Code, and Country. The Institution Address section also includes a County field and a Phone field. The Document Delivery Address section includes a checkbox for "Same as Document Delivery Address". The Billing Address section includes a checkbox for "Same as Document Delivery Address". The page also features a left sidebar with navigation tabs for Address, People, Membership, Services & Fees, and DOCLINE Options. The page includes a "Back to Results" link and "SAVE" and "RESET" buttons.

Updating Contacts

❖ Ability to assign a single person multiple roles

❖ Ability to add more than one person for a contact type

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings **Institutions** Loansome Doc Patrons Admin

Search Add Delete Manage Groups Manage Users Update CAUCLA

Update > People [Back to Results](#)

CAUCLA - University of California, Los Angeles required field = *

Address
People
Membership
Services & Fees
DOCLINE Options

Jane Doe - Interlibrary Loan Specialist

*Contact Type

Select All
 Director
 Interlibrary Loan
 Loansome Doc
 NN/LM Liaison
 Reference
 Serial Holdings
 Other

First * Jane
Middle
Last * Doe
Title Interlibrary Loan Specialist
Email jdoe@library.org

Country Area Number Ext.
Phone * 1 202 555-1212
Fax 1 202 555-1313

SAVE DELETE PERSON CANCEL

CAUCLA-DEMO
University of California :: Louise M. Darling Biomedical Library

ILL Charges

- ❖ **Base fee**
 - Library Group
 - Reciprocal Partner
 - ILL Partner
- ❖ **Surcharges**
- ❖ **Copy fees separate from Loan fees**
- ❖ **Ability to indicate countries served**
- ❖ **Ability to search institution records by base fee**

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings **Institutions** Loansome Doc Patrons Admin

Search Add Delete Manage Groups Manage Users Update CAUCLA

Update > Services & Fees [Back to Results](#) **SAVE** **RESET**

CAUCLA - University of California, Los Angeles required field = *

ILL Services

Participates in EFTS Yes No
Date Joined EFTS MM-DD-YYYY
Provides Color Copies Yes No
Fills Rush Request Yes No
Service Comments

Copy Services and Fees

Copy Base Fees

Borrower Group	Base Fee	Comments
PED	\$ 0.00	Library Group
UHSLC	\$ 0.00	Library Group
Reciprocal Partner	\$ <input type="text"/>	<input type="text"/>
ILL Partner	\$ <input type="text"/>	<input type="text"/>

Copy Surcharges

Surcharge Type	Surcharge	Comments
Color Copies	\$ <input type="text"/>	<input type="text"/> delete
International	\$ <input type="text"/>	<input type="text"/> delete

Select Value **Add Surcharge**

Sends Copies to International Libraries?
 Yes No
 All Countries Selected Countries

Delivery Info

Will receive by:
Mail - Yes
Fax - Yes
1-202-555-1213

Ariel - Yes
Primary - 155.100.78.5
Secondary - 155.100.78.2

Email (PDF) - Yes
Email (TIFF) - Yes
Web (PDF) - No
Web (TIFF) - No

ill@library.msu.edu

[Edit Settings](#)

Routing Table

- ❖ Add libraries from search results
- ❖ Move multiple libraries at once
- ❖ “Workspace” - holding area for new or moved libraries

The screenshot shows the DOCLINE web application interface for managing routing tables. The top navigation bar includes links for Home, Requests, Serial Holdings, Institutions, Loansome Doc Patrons, and Admin. Below this, there are buttons for Search, Add, Delete, Manage Groups, Manage Users, and Update CAUCLA. The main content area is titled "Update > DOCLINE Options > Routing Table" and includes buttons for SAVE, APPROVE, and RESTORE CURRENT. The current routing table is for "CAUCLA - University of California, Los Angeles".

The interface features a "Routing Table" section with tabs for Proposed, Current, and Compare. A note states: "The proposed view is where you edit your routing cells." Below this is a grid of routing cells, with the first cell selected. The grid shows a list of libraries with checkboxes and a "Delete" button. The selected cell (Cell 1) contains 9 rows of data, all from "University of California at Davis".

On the right side, there is a "Workspace" section with a "Move to Cell 1" dropdown and a "Go" button. Below this is a "Delete" section with a "Select All" checkbox and a list of libraries. At the bottom right, there is an "Add to Workspace" section with two options: "Option 1" (LIBID input and Add button) and "Option 2" (Find and Add button with a link to the Search Interface).

At the bottom of the interface, there are buttons for SAVE, APPROVE, and RESTORE CURRENT, and a note: "Routing map last changed by: XXXX Last modified: 06-06-2002".

NER SUPPORT

❖ NER “DOCLINE 2.0 Orientation Manual”

- Stored in PDF format
- Posted out on the NER Web site

❖ NN/LM Online Tutorial Revised

- Hosted by server at PNR (Pacific Northwest Region)
- Contributions by Regional DOCLINE Coordinators

❖ DOCLINE 2.0 Orientation training

- First quarter of 2004
- Host sites with “hands-on” classroom facilities
- MLA CE accreditation (AHIP)

ISO ILL Compliance

- ❖ **NLM begins testing interface between DOCLINE and ILLiad using the ISO ILL Protocol**
- ❖ **Additional interfaces expected for other commercial ILL software products**

Why ILLiad?

- ❖ **NLM's survey of ILL systems found ILLiad in use by 49 of nation's Resource Libraries**
- ❖ **NLM met Atlas Systems (producers of ILLiad) in September**

Serial Batch Update Programs | SERHOLD-to-OCLC

❖ Pilot program

- completed pilot testing in April 2003
- exported library DOCLINE serial holdings data to OCLC

❖ Schedule

- first major export (“data pull”) run over July 4th weekend
- quarterly cycle (first weekend in Jan, Apr, Jul, & Oct)

❖ Notes

- no charge to import SERHOLD data into OCLC for existing OCLC members
- holdings will map to single OCLC Symbol

Serial Batch Update Programs | OCLC-to-SERHOLD

❖ Pilot program

- completed pilot testing in September 2003
- exported library OCLC serial holdings data to DOCLINE

❖ Schedule

- first major export (“data pull”) scheduled for end 2003
- quarterly cycle; updates posted to DOCLINE-L mail list

❖ Notes

- if share OCLC codes → use OCLC-to-SERHOLD program
- thanks to all responding to clean-up of SERHOLD data

LINKOUT UPDATES

- ❖ **Ability to Add Link in print holdings Location field**
 - [LinkOut Home Page](#) | [Advanced](#) | [Add Link](#)
- ❖ **Subscribe to LINKOUT-L mail list**
 - Receive online copy of “semimonthly new journal” reports
- ❖ **Links to Ovid full text are now available on PubMed**

Questions ?



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