



# ILLiad and DOCLINE 6.1

# About DOCLINE 6.1

- DOCLINE® is the National Library of Medicine's automated interlibrary loan requesting system.
- NLM is updating DOCLINE to a new system on 3/1/19.

The screenshot shows the DOCLINE 6.1 website interface. At the top, there is a dark blue header with the NIH logo and "U.S. National Library of Medicine" on the left, and "Need Help?" on the right. Below this is a red banner with the text "-- DOCLINE 6.1: Borrowing & Lending, coming March 4 --". The main content area has a blue header with "DOCLINE®" and a "Log In" button. Below the header, there are two main sections: "Have a DOCLINE account?" with a "Log in to DOCLINE" button, and "Don't have an account?" with an "Apply now" button. To the right of these is a "What is DOCLINE?" section with a paragraph of text. At the bottom, there is a dark blue footer with the DOCLINE logo, the NIH logo and "U.S. National Library of Medicine", and contact information: "Copyright | Privacy | Accessibility", "National Library of Medicine", "8600 Rockville Pike, Bethesda MD, 20894 USA", and "NLM Customer Support".

# ILLiad & DOCLINE

- ILLiad users who want to continue to use DOCLINE via ILLiad will need to update staff clients on (target date) March 1, 2019. DOCLINE 6.1 will be live on Monday, March 4, 2019 per.nlm.
- ILLiad 8.7.2 is the minimum supported version for DOCLINE 6.1 integration.
  - 8.7.2 users will update clients to 8.7.3.
  - 9.0 users will update clients to 9.0.2.

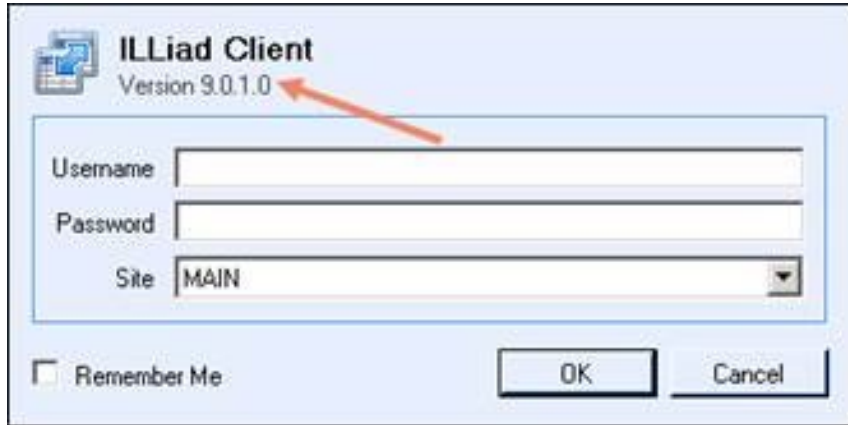
The screenshot displays the DOCLINE 6.1 web interface within a browser window titled "28 - Borrowing Request". The interface includes a top navigation bar with tabs for "Borrowing Processing", "Printing", "Copyright", "OCLC Request", and "Discovery". Below this is a search criteria section with fields for "PubMed ID" (12345), "Title" (2009 ILLiad Conferenc...), "Keyword" (2009 illad conference t...), "Author" (Paulus Amy), "Pagination" (259), and "Publication Date" (2009/07). A "Search" button is present. To the right of the search criteria are several action buttons: "Import Citation Import", "Search and Fill", "Search and Fill Selected", "Manual Request", "Fill", and "Open Docrine".

The main content area features a blue header for "U.S. National Library of Medicine" with a "Need Help?" link. A prominent red banner reads "-- DOCLINE 6.1: Borrowing & Lending, coming March 4 --". Below this is the "DOCLINE" logo and a "Log Out" button. A navigation menu includes "Lend", "Borrow", "Libraries (PAUUKV)", "Journals", and "Reports".

The central section is titled "Activity & Status for PAUUKV" with a "Switch Library" link. It contains two main panels: "MY LENDING" and "MY BORROWING".

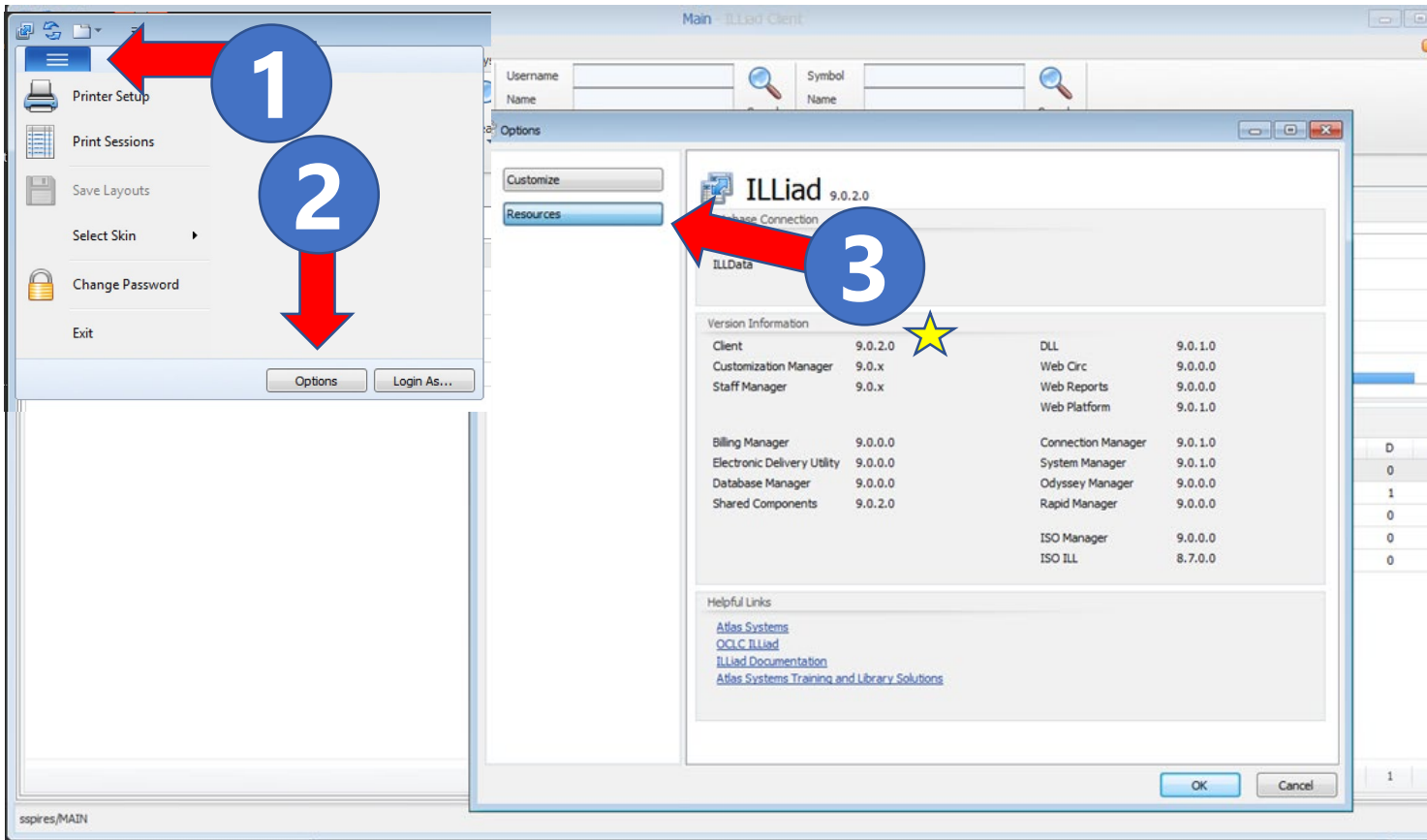
MY LENDING	MY BORROWING
<b>To Receipt</b> (No Items)	<b>Open Requests</b> (No Items)
<b>To Update</b> (No Items)	<b>Retired Requests</b> 2 Not Filled

At the bottom of the interface, a status bar shows "Awaiting Request Processing", "User Not Cleared", "No results", and "Borrowing More".



# Checking Your ILLiad Version

Displays on your client login screen



1. Click the Hamburger Menu Control at top left in the client
2. Select Options
3. Select Resources

# Checking Your ILLiad Version

# Update Process

- Your client contacts the Atlas update server and checks for updates each time you log into the client. If an update is available, a popup message will appear to notify you that an update has been found.
- Click **Yes** to download and run the client update.
- If you need a server update:
  - OCLC-hosted customers should contact [support@oclc.org](mailto:support@oclc.org).
  - Locally-hosted installations should contact your local server administrator.
  - Atlas-hosted customers can make the request to [support@atlas-sys.com](mailto:support@atlas-sys.com)





# Login

- New credentials needed
  - [https://www.nlm.nih.gov/doctype/doctinehelp/tutorials/video doctine account 6 3 video/DoctineAccount 6 3 1080p.mp4](https://www.nlm.nih.gov/doctype/doctinehelp/tutorials/video%20doctine%20account%206%203%20video/DoctineAccount%206%203%201080p.mp4)
  - ILLiad client 8.7.3 and 9.0.2 will no longer auto login or logout of DOCLINE and will not use the Customization Manager keys for Doctine Username or Password. NLM now requires individual login accounts so logins and logouts are manual from the client browser.
    - In testing, the DOCLINE session remained active for an extended time.



# Field Translation

- Support for searching multiple fields

```
<TranslationMap Type="DataSource" Name="PubMedSearchID" Target="Search.PMID, Transaction.ESPNumber"/>
```

### Changes to

```
<TranslationMap Type="DataSource" Name="PubMedSearchID" Target="Search.PMID, Transaction.PMID, Transaction.ESPNumber"/>
```

- Support for importing to multiple fields

```
<TranslationMap Type="ImportTarget" Name="PMID" Target="Transaction.ESPNumber;Transaction.PMID"/>
```

- Removed Patron Name

```
<ComplexMap Name="PatronName">[#User.LastName], [#User.FirstName] - TN: [#Transaction.TransactionNumber]</ComplexMap>
```

### Changes to

```
<ComplexMap Name="PatronName">TN: [#Transaction.TransactionNumber]</ComplexMap>
```

# Field Translation

- To apply new changes overwrite your FieldTranslation.xml with the new default FieldTranslation.xml from the DefaultScripts.zip folder or edit your existing file with the new values.
- Usually found in C:\Program Files (x86)\ILLiad\Docline\DefaultScripts.zip\Docline

# Lending

Import from clipboard is no longer available.

LendingFieldTranslation.xml contains mappings that are parsed from Docline receipt pages to the ILLiad transaction fields.

New Home button is available for navigation to main DOCLINE page

Import ALL Requests button will attempt to navigate to normal, rush, urgent patient care receipts. Import All Requests will mark all requests in each category as received.

Import and Receipt can be used if navigating to a specific request type receipt page within the client DOCLINE browser. Options include Import and Receipt Current Page or Import Current Page.

## Reasons for Cancellation

- When performing lending updating ILLiad will attempt to map some older values to the new equivalents.
- You can manually update the LendingReasonsForCancellation table using Customization Manager to use the new DOCLINE codes.

Reason	OLD DOCLINE	NEW DOCLINE
Non Circulating	non circ	NCR
Exceeds Max Cost	max cost	CST
On order	ordered	ORD
Not as cited	bad cite or inc*	INC
Title not owned	NOT	NOT
Holdings end before	lacking	LAC
Holdings end after	lacking	LAC
At Bindery	bindery	BDY
Lack Volume/Issue	lacking	LAC
Issue not yet received	not yet avail	NYR
Lost	lost	LOS
Not on Shelf	nos	NOS
Exceeds copy limits	Other	EXL
Offsite	other	other
Item too new to loan	non circ	NCR
Other	Other	Other

# Borrowing

- Manual Request & Fill (with Fill & Send) are now separate buttons
- Transfer Loansome Doc is no longer available
- Process aligned with OCLC requesting now requiring review and “Request Sent” action

# Loansome Doc

- On July 1, 2019, the National Library of Medicine (NLM) will retire the Loansome Doc system due to declining use.
- ILLiad client 8.7.3 and 9.0.2 integrate with DOCLINE 6.1 which no longer supports Loansome Doc.

## Other notes

No changes with configuration in Customization Manager except that the Docline credentials are no longer used.

If any issues with info display, setup Internet Explorer compatibility View <https://support.atlas-sys.com/hc/en-us/articles/360011807094-Docline-Configuration>

Once you have installed the new client, you will need update any existing lending requests that were created in the legacy DOCLINE version via the web, outside of ILLiad.



# Need to learn more about DOCLINE?

- New NLM tutorials for DOCLINE at <https://www.nlm.nih.gov/docline/support/path.html>



A screenshot of a web browser showing the Atlas Systems community page for "ILLiad Best Practices". The page has a blue header with the Atlas Systems logo and navigation links. The main content area shows a list of posts with titles, author names, and timestamps. Each post has a "0 comments" and "0 votes" indicator.

Atlas Systems | Community | ILLiad Best Practices

## ILLiad Best Practices

Show all | Sort by newest post | 23 followers

How do I know when an item has shipped?  
Heather Black • 33 minutes ago | 0 comments | 0 votes

ILLiad and DOCLINE 6.1  
Stephanie Spires • 18 hours ago | 0 comments | 0 votes

The CCC's new TLS 1.2 Security Protocol Requirements  
Sara Juel • 13 days ago | 0 comments | 0 votes

# Stay Updated

<https://support.atlas-sys.com/hc/en-us/community/topics/115000191628-ILLiad-Best-Practices>