GRATISNET Manual

Updated: 21/09/2009

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G - GLOSSARY
This document is maintained by Prosentient Systems and provides guidelines on use of the Inter-Search document delivery system used by GratisNet. Comments, and suggestions are welcome and should be sent to support@intersearch.com.au.
1. Technical Specifications

Inter-Search

The software that supports the GRATISNET is called Inter-Search. It provides the framework for Inter-Library Loans, document delivery and electronic collection management of your titles in this network. This user manual is intended for registered network members and those would like to see more details on how this system works. The software of this system is © Prosentient Systems.

Compatibility

This site uses HTML Tables to optimise information presentation. Cookies must be enabled for this site in order to maintain session continuity. Cookies are only used for session continuity and are otherwise anonymous. A minimal amount of Javascript is used to enhance data entry and for some enhanced table presentation, but not to a degree that will prevent older browser from working with this site. Design consideration has been given to optimising the site for the maximum range of browsers. The site has been tested on:

- Firefox 2 or later
- Netscape 3.0 and later - fully compatible
- Internet Explorer 2.0 - will work with some layout limitations in the table presentation
- Internet Explorer 3.0 or later - fully compatible

Many pages on this site use HTML style sheets which look best in Firefox (version 2 or later) and Internet Explorer (version 6 or later).

Detailed instructions for Introduction to GRATISNET

1. test1
2. test2
3. test3
4. test4
2. Access & Membership Information

The GRATISNET Membership page provides details of the history and charter of the organisation. Use the Contacts button at http://www.gratisnet.org.au to determine the current contacts for your state/region if you wish to join the GRATISNET network.

2.1 Logging On

Detailed instructions for Logging on to GRATISNET

1. Start your web browser (for example Internet Explorer or FireFox).

2. Navigate to http://www.gratisnet.org.au

3. Type in your username and password. Your username is your NUC code

4. If you have difficulty logging in, you can use the Remind Me button to have your password emailed to you.
2.2 GRATISNET Home Page

From the GRATISNET Intranet Home Page the various search and administrative functions of the site are accessed.

The Search button provides a fast and effective means of locating titles, raising ILL requests and adding holdings to your collection.

The Requests button provides a means of turning bibliographic lists (e.g. search output from online databases or extracts from an ILL request system) into a series of multiple matched ILL requests through GRATISNET.

The Books button provides a request page to allow you to send a book request to libraries that lend books in GRATISNET.

The Membership button contains a brief document relating to the history of GRATISNET and other important resources (such as the Code of Conduct).

The Resources button gives access to the shared document area for GRATISNET members. This is also the location where libraries can upload PDF's and other document delivery requests for collection by other libraries.

The Duplicates button gives access to the duplicates system - a means of sharing your duplicates with other GRATISNET members.

The Administration functions allow maintenance of the GRATISNET database contents, including the Directory of Libraries, the Journal Title database and the holdings for each Library.

Useful Links to other sites are also shown, and membership information is provided.

The Add Journal button provides a short cut to adding to titles to GRATISNET.

The Help button contains a FAQ link, two different versions of GRATISNET manuals, a printable directory of membership, additional instruction sheets, and a help contents page. GRATISNET also includes a page-sensitive integrated help.

The Manual button shows the full GRATISNET user manual.

Please Logoff when finished with GRATISNET to avoid any unauthorised access and/or use of the system.
2.3 Changing Your Password

The GRATISNET site requires password access to most functions. It is important periodically to change your password. Good password practice is to use a combination of letters and numbers with a password of more than five characters in length. You can change your own password at any time you wish.

Detailed instructions for Changing your Password


2. At the GRATISNET home look for the Edit My Library Details link and click this link. Click Edit against your NUC.

3. Against the password input box enter a new password and click the Save button
2.4 Code Of Conduct

GRATISNET - NATIONAL CODE OF CONDUCT, RULES AND OBJECTIVES

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PHILOSOPHY

GRATISNET members believe in the importance of a co-operative and free inter-library lending network, based on the premise that most libraries have something to contribute.

GRATISNET members believe that co-operation is preferable to charging in that co-operation leads to utilisation of resources which may not otherwise be available.

GRATISNET members also believe in the importance of sharing the inter-library lending load in an equitable manner and observing a code of conduct embodying consideration for others and good inter-library loans etiquette.

1. AIMS OF GRATISNET

1.1 To maximise use of resources available within the network before approaching outside sources.

1.2 To supply inter-library loans through a free and timely co-operative inter-library loan service to other members.

1.3 To ease the pressure on net lenders within the network via an agreed ranking system.

1.4 To maintain a web-based list of serials to facilitate inter-library loan transactions.

2. MEMBERSHIP CRITERIA

2.1 Australasian libraries in health and related fields are eligible to apply for membership of
2.2 The library should be managed by a person who is eligible for associate or technician membership of ALIA.

2.3 Libraries applying for membership are required to submit their application to the relevant State Committee on the library registration form. See the Membership Kit - point 6.

2.4 The relevant State Committee will evaluate the ability of an applicant library to contribute to the network, and on the basis of that evaluation have the authority to accept or reject an applicant.

3. OBLIGATIONS AND DEFINITION OF NEW MEMBERS

3.1 A mutual no-charge agreement exists only when a new member has arranged to add their complete holdings, available for document delivery, to the web-based list of serials.

3.2 New members MUST arrange for a NUC symbol from the National Library of Australia, or an appropriate identifier approved by the relevant State Committee. There is no obligation to contribute to Libraries Australia.

3.3 Members are required to pay an appropriate membership fee that is endorsed by the National Executive Committee.

3.4 Payment by a member of the membership fee will be taken to indicate the intention of the library to remain a member for the current subscription period.

3.5 A member is deemed to be the library service identified by a unique NUC code or agreed identifier.

3.6 Membership cannot be transferred by a member to a library with any other NUC code, or agreed identifier, except at the discretion of the appropriate State Committee.

3.7 Members are required to maintain their web-based library entry with particular reference to temporary closure dates and contact details.

4. TERMINATION OF MEMBERSHIP

4.1 Suspension

Individual State Committees reserve the right to suspend a member within their State, for consistently not complying with the rules and code of conduct detailed herein. At no time may another state take direct action against another library outside their state. If an individual library's conduct seems to be inconsistent with these rules, then the matter must be addressed to the State Committee of the complainant for referral to the State Committee of the infringing member or to the National Executive Committee. State Committees are responsible for notifying the National Executive Committee of any suspensions. The National Executive Committee then notifies the membership.
4.2 Resignation

A member who intends to resign from the network will:
- notify their relevant State Committee well in advance of their intention to resign
- consult with their relevant State Committee with regard to a mutually acceptable time for their resignation to take effect

4.3 At the cessation of the membership:
- The State Committee will arrange for the deletion of the holdings in question
- The State Committee will notify the National Executive Committee

4.4 No membership fee paid by a member will be refunded, either in total or in part, on termination of membership.

5. NEW TITLES AND HOLDINGS

5.1 Notify National New Titles Co-ordinator regarding any new titles or title changes via the web-based form or e-mail.
5.2 Participants are required to promptly amend their holdings. Problems with amendments should be referred to the State New Titles Co-ordinator

6. CONDUCT OF INTER-LIBRARY LOAN REQUESTS

6.1 All members are assigned a ranking by the State Committee to facilitate the even distribution of requests. The ranking system, both intra- and interstate, MUST be observed by directing the initial request to the first library listed with appropriate holdings. Where the ranking has not been observed, the recipient of the request has the option to return the request to the library of origin. This does not preclude existing regional or local arrangements between consenting members.

6.2 As a courtesy to all members, when making a request from a library not at the top of the ranking because previous requests have been unsuccessful, the requester is encouraged to note which libraries have been previously tried. Electronic mail requests should have this information recorded in the "additional delivery comments" field.

6.3.1 Where alternative GRATISNET locations are provided, forward requests directly to the first listed alternative location.
6.3.2 If no alternative locations are supplied unsuccessful requests should be returned IMMEDIATELY to sender, noting the reason why unsuccessful.

6.4 Number of requests:

6.4.1 There is no limit to the number of requests that can be sent to one location at any one time. However, where members are likely to send more than five requests they should phone to arrange this in advance. More than five requests should be placed in priority order.

6.4.2 Requests that can be fulfilled, should not be returned as unsuccessful. Libraries are expected to complete all requests, with the option of spreading the load over a period of time or should negotiate directly with the requesting library if there are any difficulties.

6.5 Non photocopy Inter-Library Loans (Monographs etc.)
6.5.1 A library has the right to refuse a non photocopy inter-library loan

6.5.2 Any library not prepared to lend these items or requiring payment, should state this on the web-based directory of members.

6.6 Any transaction incurring costs/or a charge is NOT considered to be a GRATISNET transaction.
6.7 Requests with incorrect citations may be returned to sender unfulfilled

7 FORMAT OF INTER-LIBRARY LOAN REQUESTS

7.1 Method of receipt or supply of requests is at the discretion of the supplying library. The preference of members should be strictly observed.

7.2 Telephone requests should only be made if the receiving library states on the web based directory of members that they will accept them.

7.3 URGENT REQUESTS

7.3.1 It is recommended that urgent requests should be negotiated between the libraries concerned at the time

7.3.2 More than three requests at once should not be made to members who do accept requests by phone without prior consultation
7.4 All requests NOT requested through the GRATISNET website should be clearly identified as being from a GRATISNET member.

8. STATISTICS

8.1 Members agree to supply transaction statistics using a standard form (as determined by the State Committee). Statistics are to be forwarded to the collecting officer of each State Committee. These statistics are required to determine each library's overall ranking.

8.2 All State Committees agree to use a standard method of collecting and collating statistics. These statistics will determine the state ranking.

9. COMMITTEE MEMBERSHIP

9.1 Each state will elect from its own membership a committee to manage the network in that state.

9.2 The National Executive Committee will be formed from a State Committee on a rotational basis every two years, i.e. rotating in the order of NSW, SA, QLD, VIC, and ACT. A State Committee may decline to serve as the National Executive Committee.

10 MEETINGS

10.1 Members are welcome to attend Committee meetings or contact committee members if they have an issue to be discussed.
10.2 General meetings of members shall be held as necessary for the purpose of system review and discussion of problems.

10.3 Problems of an interstate nature should be referred to the member's State Committee and if necessary then to the National Executive for discussion and appropriate action.

10.4 GRATISNET General Meetings may be held at the discretion of the National Executive Committee

10.5 Minutes of any meetings held by the National Executive Committee or State Committees may be posted on the website at the Committee’s discretion.

11 ORDER OF PRECEDENCE

11.1 In the situation where individual State codes of conduct, rules and objectives differ, then the National Code of Conduct, Rules and Objectives will take precedence.

12 AMENDMENTS TO THE CODE

12.1 This document may only be amended following a ballot of all members of each proposed amendment. The ballot will be coordinated by the National Executive Committee

12.2 For any proposed amendment to this document to be ratified, it must obtain the approval of a majority of states. The position of each state is determined from the majority of balloted votes from the state.
3. Searching For Items And Raising Inter-Library Loan Requests

The system provides two main methods for raising ILL requests:

- The **Search** button - to find libraries with holdings one journal at a time, by ISSN, title, Abbreviation and other search methods

- Multiple search processing using the **Requests** button by pasting in the search output from bibliographic databases and from other ILL request systems

When matching requests to libraries with holdings, search results are reported in a ranked manner. Periodic (usually annual) statistics are used to rank libraries so that more frequent supplying libraries are ranked lower in search results. This facilitates equitable distribution of requests in the network.

The Administration section documentation has information on how to update library statistics.

The **Search** menu also has extended facilities to search on the directory of members by email, library name and other library details.

You can use the **Search** page to add holdings information to existing journals

You can also look up the current ranking of libraries using the **Search** page.

Finally, the **Search** page has printable membership directories.
3.1 Searching For Journals

The GRATISNET Search Engine is the main portal to the extensive collection of journals and journal holdings.

The default search is truncated title searching. In other words, just typing in part of a title into the box and pressing ENTER will start a search for the title.

For other types of searches (e.g. NUC symbol, ISSN, keyword, etc), type the information into the box FIRST and then click on the button for the required type of search. Do not click on a search button without first entering a search term into the box at the top.

The search engine allows:

- **Holdings** searching only for those journals where print or electronic holdings are available
- **Keyword** searching by a portion of a journal title
- **Title** searches by the full or truncated title
- **Directory** searching on the directory of member libraries
- **NUC** searches on the NUC codes for member libraries
- **Ranking** listings for given libraries

**Detailed instructions for Searching for journals**

1. Click on the **Search** button in the left-and menu.
2. You will see the main search page.
3 Use the Search text box to enter the title or partial title you wish to search on.

Supply your search term below. Press ENTER to search by TITLE, or click on one of the search types.

Search Journals
TitleHoldings Journal Holdings Search - only journals with holdings will be returned
Title Journal Title Search - all matching titles will be returned, irrespective of holdings
Keyword Journal Keyword search
Abbreviation Journal Abbreviation Search - for records that include this data
ISSN ISSN Search - for records that include this data
Boolean Complex search
You may use and/or and not - search terms are automatically masked

Search Libraries
DIRECTORY Library Directory (search on NUC or keyword)
Note also:
• The full directory of members (printable)
• A printable staff directory (includes Staff Directory from the Contacts field)
• The contact directory by Login/NUC (phone fax email only - printable)
• The contact directory by Institution (phone fax email only - printable)
NUC NUC Search
Ranking Ranking by NUC

4 When searching on a title or keyword, the resulting Journal Title matches are hyperlinked. Clicking on a given search result will show further details regarding the journal and a summarised holdings by library.
The holdings are shown in ranked order:

1. Holdings for the state-of-origin of library searching
2. Within each state, the ascending ranking of each library with holdings
3. State-based rankings of other states

<table>
<thead>
<tr>
<th>Search Journals</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TitleHoldings</td>
<td>Journal Holdings Search - only journals with holdings will be returned</td>
</tr>
<tr>
<td>Title</td>
<td>Journal Title Search - all matching titles will be returned, irrespective of ordering</td>
</tr>
<tr>
<td>Keyword</td>
<td>Journal Keyword search</td>
</tr>
<tr>
<td>Abbreviation</td>
<td>Journal Abbreviation Search - for records that include this data</td>
</tr>
<tr>
<td>ISSN</td>
<td>ISSN Search - for records that include this data</td>
</tr>
<tr>
<td>Boolean</td>
<td>Complex search - search terms are automatically masked</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Search Libraries</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DIRECTORY</td>
<td>Library Directory (search on NUC or keyword)</td>
</tr>
<tr>
<td>NUC</td>
<td>NUC Search</td>
</tr>
<tr>
<td>Ranking</td>
<td>Ranking by NUC</td>
</tr>
</tbody>
</table>

- The full directory of members (printable)
- A printable staff directory (includes Staff entries from the Contacts and Addresses table)
- The contact directory by Login/NUC (phone fax email only - printable)
- The contact directory by Institution (phone fax email only - printable)
6 Review the holdings of the libraries shown and select the first library in the list which has holdings matching your request - click on the NUC symbol for this library, which is hyperlinked.

Notice the following symbols against holdings:

- An orange P - the journal is held in print version
- A blue E - the journal is held in Electronic format
- A green @ symbol - the journal can be emailed electronically
- A red @ symbol - no emailing of electronic articles is allowed

7 As per Code of Conduct, the ranking order MUST be adhered to so that no library is unfairly overwhelmed. The formats are specified to add value to and inform libraries of their own holdings. This facility will only work well when members can feel confident in adding their online holdings without adverse consequences.

When an article is very recent and it is known that it will not be available in print yet, naturally the libraries with electronic access can be approached first. Otherwise, DO NOT select libraries with electronic holdings just for convenience sake.
3.2 Raising Inter-Library Loan Requests Using SEARCH

Once you find a journal matching your requirements, you can raise an ILL request. The first feature that a requesting library should take note of is the “Notes” field under the supplying library’s details. This information should ALWAYS be checked before any request is sent through in case there is a restriction that may affect the request.

The “Request No.” field is an option for the library to enter their own record-keeping information. Use the drop-down box next to “Delivery” to specify the required/desired delivery form.

The “Priority” box displays the three options for urgency:

- **Normal** – A reasonable time frame that the supplying library can be expected to supply the document as part of the usual workflow (usually within 5 days)
- **Medium** – Does not require immediate action but is needed by a time frame as specified in the “Additional Delivery Comments” box (usually within 48 hours). May need to be telephoned or faxed through to ensure prompt attention
- **High** – Requires immediate attention. This type of request should be faxed or telephoned through to the supplying library with instructions specifying exact ‘need by’ information (usually within 2 hours or AM/PM)

The “Additional Delivery Comments” box should be used for the ‘need by’ instructions as well as other relevant information.

Please list “Alternative Locations” ONLY if the request is to be forwarded to another library. The box below “Alternative Libraries” lists other holdings in ranked order. By highlighting the entries for up to three libraries, the system will automatically add the library and their fax number details to the Request form. Typing in the NUC symbol will not automatically add the fax number, which makes extra work for the library forwarding the request, so please use the system’s function. **It is assumed that if there are NO libraries listed here, the request is to be returned to the requesting library.**

**Detailed instructions for Raising Inter-Library Loan requests**

1. Search for a journal that you wish to request using the **Search** button on the intranet home page (refer the guidelines on searching).
2. The first feature that a requesting library should take note of is the “Notes” field under the supplying library’s details. This information should ALWAYS be checked before any request is sent through in case there is a restriction that may affect the request.

The “Request No.” field is an option for the library to enter their own record-keeping information. Use the drop-down box next to “Delivery” to specify the required/desired delivery form.

The “Priority” box the urgency of the request. The delivery method allows you to specify your preferred means of delivery. If you cannot accept a particular method (e.g. electronic) please select your preferred delivery method here.

Please list “Alternative Locations” ONLY if the request is to be forwarded to another library. The box below “Alternative Libraries” lists other holdings in ranked order. By highlighting the entries for up to three libraries, the system will automatically add the library and their fax number details to the Request form. Typing in the NUC symbol will not automatically add the fax number, which makes extra work for the library forwarding the request, so please use the system’s function. **It is assumed that if there are NO libraries listed here, the request is to be returned to the requesting library.**
3. Click on “Send ILL request by Email” to send the request to the email address listed in the directory.

Click on “Generate ILL Fax Form” to create a form, which you can print and then fax. Please note that GRATISNET will NOT send a fax directly from the system.

4. Refer also to the section on raising requests through the Bibliographic request module.
3.3 Raising Inter-Library Loan Requests - The REQUEST Option

The REQUEST option allows you to import a bibliographic list and match the items to holdings in the network. This system works for sources such as:
- PubMed
- Ovid
- InMagic
- WebSpirs

It can also be used to import requests from existing ILL systems for matching against GRATISNET.

The “Req No.” (Request Number) field is an option for the library to enter their own record-keeping information. Use the drop-down box next to “Delivery” to specify the required/desired delivery form.

It is generally preferred not to use this system for priority requests.

The “Additional Delivery Comments” box should be used for the ‘need by’ instructions as well as other relevant information.

As with Search-type requests, please list “Alternative Locations” ONLY if the request is to be forwarded to another library. The box below “Alternative Libraries” lists other holdings in ranked order. By highlighting the entries for up to three libraries, the system will automatically add the library and their fax number details to the Request form. Typing in the NUC symbol will not automatically add the fax number, which makes extra work for the library forwarding the request, so please use the system’s function. **It is assumed that if there are NO libraries listed here, the request is to be returned to the requesting library.**

**Detailed instructions for Raising Inter-Library Loan requests from bibliographic lists (the Request button)**

1. Click on the Request button on the intranet home page

2. You can have your matching results in either of two formats:

   - narrow - the matching results display will fit in smaller browser windows but will
3. First you must select the format of your bibliographic/search result list. Only those formats showing in the drop-down list are supported.

4. Paste in your bibliographic search results in the text box. Note the 65000 character limit (may be smaller for some browsers) and click the **Process** button.
5. You will be presented with the matching results against GRATISNET. Each bibliographic entry will appear on a separate line. First you should determine your preferred delivery method and priority. **It is not advisable to use the Requests method for high priority requests as some libraries may only be staffed part-time or have additional notes that can only be viewed when requesting through the Search method**.

6. Against each matched request you can choose the preferred library. Matching libraries are displayed in normal ranking order and this ranking should be respected where possible. Select your preferred library by choosing it from the first drop down list on the line.

   Review the bibliographic entry to ensure that the entry has matched correctly.

7. Select any alternate libraries if you want your request forwarded if the first choice of
library is unable to fulfil.

Finally, choose your action for this request:

- email - this request will be sent by email
- fax - this request will be sent by fax
- ignore this line entry will be ignored (a summary of ignored items will be displayed)

8. Click PROCESS THESE REQUESTS when you are ready

9. You will be presented with a report page which has:
   a) any Faxes to be printed and sent
   b) a summary of email transmissions
   c) a summary of items skipped/ignored
3.4 Raising Book Requests

The BOOKS option allows you to send an loan request by email for book titles. You are presented with a simple email book request page. In the drop down list of libraries are listed all libraries who have indicated that they will lend books. Note: does not have book searching facilities at present. You will need to search Libraries Australia or another service first to check availability.

**Detailed instructions for Raising Inter-Library Loan requests from bibliographic lists (the Request button)**

1. Click on the **Books** button on the intranet home page

2. You will be presented with a book request form. Specify your From Name and From Email address and the subject of your request.

   **Make sure you select a TO library**

   Fill in the details of the book you wish to borrow.
Book Request Email

Use this form to send a request to borrow a book. An email will be sent to those libraries who Monographs" ticked in their profile. To update your own library profile to "Accept Monograph Library Details: Please supply the email details below:

NOTE: do not use the browser REFRESH or BACK buttons as this can result in resubmission.

standby.gratisnet.org.au SUCCESSFUL EMAILS:

FROM NAME:

FROM EMAIL:

FROM SUBJECT:

TO: AAIH - Australian Institute Of Health & Welfare -

BOOK REQUEST MESSAGE (please remember to sign your message)

Can you please indicate if you can supply the following
Book for loan
Author:
Title:
Publisher:
ISBN:
Chapter:
Pages:

Send this Book request Email

3. Click on the SEND button

Send this Book request Email
4. Resources Area

This page allows you to review the shared resources in your network. You may upload resources to this area. Documents in this area are visible only to members who are logged into the system. While this area is commonly used for delivery of ILL requests, it can also be used to load minutes and other documents/resources relevant to GRATISNET members.

Contact the support@intersearch.com.au email if you need additional resource categories to be added to this menu.

In the case of general documents, the library that uploads a document and State Administrators have access to a delete function to remove documents from the resource area.

Document Delivery items are automatically cleared after 30 days, and can be deleted by the receiving library.

Headings can be clicked to sort by resource type, name or creation date (Javascript must be enabled - does not work for all browsers). Email support@intersearch.com.au if you wish to have additional document categories added.

**Detailed instructions for Resources area/document delivery area**

1. Click on the Resources button from the intrant home page.

2. You will see a list of shared documents and Document Delivery files. Where you have uploaded a shared document, or you have been sent a PDF/ILL document, you will see a delete option allowing you as the document owner to remove the document from the resources area.

   Document delivery items are stored for 30 days and are automatically removed.
5. Electronic And Open Access Resources

If your library has consortia subscriptions to electronic journals, you can now use a single-click registration process to record the entire consortia collection against your holdings. It is also a single-click to unsubscribe subsequently.

A range of electronic consortia subscriptions are included. The list currently includes:

- BMJgrouponline
- EBSCOAcademicElite
- EBSCObiomedicalreference
- Ebsco Psych & Beh
- Ebsco
- Ebsco Health Business Elite
- EBSCO Medline with full text
- IEEE/Xplore
- Informit Online
- LegalTrac
- Open Journal Gateway
- Proquest5000
- ProquestBusiness
- ProquestCriminalJustice
- ProquestGovt
- ProquestHealthandMedical
- ProquestNursing
- ProquestPsychologyJournals
- PubMed
- ScienceDirect

You can also choose to register your electronic subscription details as "private holdings" if your licensing terms do not allow ILL lending.

Every month we refresh the consortia details journal additions, changes and deletions. Note that your subscription detail will be refreshed monthly as part of this process.
5.1 Subscribing To Electronic Consortia Lists

Inter-Search is constantly being expanded with new Consortia resources, reflecting the common consortia arrangements. This is done when the publisher provides an online text list which is reliably updated and is amenable to automatic import into the database.

Updates are performed monthly. Only journals that have **full text** are imported.

Provider formats do change periodically, and the Inter-Search system needs to be updated to match provider changes. Please send an email to support@intersearch.com.au if you identify any anomalies in journal information in one of the consortia subscriptions.

Detailed instructions for Subscribing to electronic consortia lists

1. To add all full text journals for a given consortia collection, first click on the **Administration** button

2. Look for the **Electronic collections** link

3. You will see a list of consortia collections. to add one of these collections to your profile, just click either:
   - Join (Holdings Publicly Visible) - all full text journals will appear in the GRATISNET search results
   - Join (Holdings Private) - only use this option where your licensing agreement forbids ILL's

<table>
<thead>
<tr>
<th>#</th>
<th>Collection</th>
<th>Full Text?</th>
<th>Access Type</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>AGISplus</td>
<td>0</td>
<td>Free</td>
<td>Titles</td>
</tr>
<tr>
<td>2</td>
<td>Another</td>
<td></td>
<td></td>
<td>My Holdings</td>
</tr>
</tbody>
</table>
5.2 Unsubscribing From Electronic Consortia Lists

Detailed instructions for Unsubscribing from electronic consortia lists

1. To remove full text journals for a given consortia collection, first click on the Administration button

2. Look for the Electronic collections link

   - Add a Journal Title - Add a new journal/title to the database.
   - Journals - The Journal Title database. New Journals can also be registered.
   - Update holdings - Bulk upload of holdings for a library.
   - Electronic collections - Administer, join and leave electronic collections.
   - Union List - Printable network union list (long).

3. Click on the remove link
5.3 Open Access (EFREE) Journals

GRATISNET has an extensive collection of Open Access journal lists. The register of open access journals is held against the library NUC of EFREE - or electronic free access journals.

When you search for journals, open access resources are always ranked first in the list of libraries. Open access journals sometimes have embargo restraints, and where known these are shown against the holdings of the EFREE libraries.

You can suggest new EFREE journals by emailing support@intersearch.com.au. Against all EFREE titles when you search you will see a suggest a change link. This can be used to alert the EFREE coordinator of embargo or other changes to the open access journal, or of broken links.

You can generate a report on EFREE titles as follows:

**Detailed instructions for Open Access (EFREE) journal management**

1. Search for EFREE as the NUC code. A list of journals held by EFREE is displayed.

2. Select the Reports link at the top right

3. Make sure you include "Journal title" and "electronic URL" in the list of fields then create the report

4. Cut and paste all the entire report into "Notepad/word" from GRATISNET, and then saving the result as a .txt file.

5. Open Excel. Select File -> Open -> then select the txt file you just saved.

6. Excel will convert the txt to excel format . . select the delimited option . . then select the comma option instead of tab as the delimiter.
6. Updating Your Profile And Holdings

As a network member, you can update your library profile, including your contact details, journal holdings and current electronic subscriptions. This section gives you details on performing the following tasks:

- Changing your address
- Changing your email contacts
- Setting up temporary closure details
- Maintaining your library contacts/staff profile

For information on managing your list serve profile, see the following section on using the ListServe.
6.1 Updating Your Library Address

You can update your address details at any time you require. This includes your phone, fax, delivery address, email details, DX address (where relevant) and other contact information. Your delivery address, DX address and other postal information details are important for purposes of inbound requests and when requests are being posted to you.

Detailed instructions for Updating your library address

1. Go to the GRATISNET
   • intranet home page. Look for the Edit My Library Details link and click this link.

2. Click on the Edit on the library list page.

3. Change your address and other information as required - you may need to scroll down the page to see all the library details you wish to update.

   The primary contact in most cases is your email address - be careful to enter this address with no leading and trailing spaces. Click SAVE when you have entered your library details.
6.2 Updating Your Library Emails

You can update your email contacts at any time you require. There are three core emails that you can specify in your library profile:

Email - your ILL email address
Managers email - if specified, invoices and other administrative notices will go to this address
List email - if you are using the Inter-Search list serve, this will be your Primary email on this service. Note that you can add other list serve email contacts - this is the contact that will be applied when clicking on the Listserve button on the left hand menu. See the "ListServe" section below for more details.

Detailed instructions for Updating your library emails

1. Go to the GRATISNET intranet home page. Look for the Edit My Library Details link and click this link.

2. Click on the Edit on the library list page

3. Scroll down to about the middle of the page and look on the right for the email address details.

   The primary contact in most cases is your email address - be careful to enter this address with no leading and trailing spaces.

4. Click SAVE when you have entered your library details.
<table>
<thead>
<tr>
<th>Library Details</th>
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</thead>
<tbody>
<tr>
<td><strong>LibraryID</strong></td>
</tr>
<tr>
<td><strong>NUC/Library Code</strong></td>
</tr>
<tr>
<td><strong>Password</strong></td>
</tr>
<tr>
<td><strong>Name</strong></td>
</tr>
<tr>
<td><strong>Institution</strong></td>
</tr>
<tr>
<td><strong>System</strong></td>
</tr>
<tr>
<td><strong>Street</strong></td>
</tr>
<tr>
<td><strong>Suburb</strong></td>
</tr>
<tr>
<td><strong>State/Region</strong></td>
</tr>
</tbody>
</table>
6.3 Temporarily Suspending Your Library

If your library is likely to be closed for several days or longer, it is advisable to flag your library as "temporarily closed". This information is displayed on the ILL search page and your library NUC is "greyed out" so that libraries cannot send you requests (through GRATISNET).

You can specify the following:

- The closure date. Your closure will automatically be effected on the date supplied
- The date you reopen - you can leave the opening date blank if you expect an indefinite closure (e.g. short staffed). If you supply a re-opening date your library will automatically be re-enabled on that date
- The reason for the closure - this is very important, and will also be displayed on the Search page

Detailed instructions for Temporarily suspending your library

1. Go to the GRATISNET
   - intranet home page. Look for the Edit My Library Details link and click this link.

2. Click on the Edit on the library list page

3. Scroll down to the bottom of the page and look for the temporary closure reason and dates.

Dates are entered in dd/mm/yyyy format.
4. Click SAVE when you have entered your library details.

<table>
<thead>
<tr>
<th>Library Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library ID</td>
</tr>
<tr>
<td>NUC/Library Code</td>
</tr>
<tr>
<td>Password</td>
</tr>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Institution</td>
</tr>
<tr>
<td>System</td>
</tr>
<tr>
<td>Street</td>
</tr>
<tr>
<td>Suburb</td>
</tr>
</tbody>
</table>
6.4 Adding Staff And Other Library Contacts

Your library may wish to add additional staff contacts in your library (e.g. reference desk contacts, alternative ILL contact officers.

These additional staff contacts appear in the printable member directory.

Detailed instructions for Adding staff and other library contacts

1. Go to the GRATISNET intranet home page. Look for the Edit My Library Details link and click this link.

2. Click on the My Contacts/Staff tab on the library list page

3. To add new staff contacts, click on the create a STAFF MEMBER entry

4. Fill in the staff member details

Your Library: Test library only - PLEASE IGNORE ME

NUC/Library Code: NTEST

Organisation: Science direct

Contact Name: Science Direct contact

Contact Type

5. Click SAVE when you have entered your library details.
6. To add additional staff members, click on the **Edit** link against their name.
6.5 Adding/Changing Journal Titles

You can add individual journals using the Add Journal button on the left hand menu bar. Before adding a new journal, you should check whether this journal already exists using the Search button. This process is described in the section "Updating your holdings through Search".

If you have several journals to add or update, you should use the update options described in the section " Updating All Your Holdings".

The following information should be supplied for all journals registered on the system:

- The proper journal title for the publication
- The ISSN, in xxxx-xxxx format (i.e. include the hyphen)
- Details of its previous title if any
- Details of any title that this publication is continued by
- Abbreviation when available
6.6 Formatting Your Journal Holdings

This has been designed to make the list easiest to read. Please use the exact punctuation used here. The symbol • means leave one character space blank.

1. When the holdings start with the first issue of a volume, do not put in the issue number

V. •1 (1993) •-

2. When holdings start after the first issue, put in the issue number

V. •1 •No. •3 (1993) •-

3. When the journal has NO volumes, but issue numbers only

No. •4 (1993) •-

4. When the enumeration is by month and year only

MAR •(1994) •-

5. When the enumeration is by year only do not use parenthesis

1994 •- •1996

6. When holdings are imperfect, only note the gaps of whole volumes or years (not issues). Do not repeat the “V” for volume. Separate missing volumes or years by a colon “:”. If the holdings are very imperfect, only enter the broadest year bracket and indicate with the abbreviation “Impf.” after the holding statement


OR


NOT


7. When holdings are closed, still include the number “No.” if necessary

V •20. •No. •7 (1995) •- •25 •No. •5 (2000)

8. When holdings are for the current year only use abbreviation CYO. Do not provide other holdings data.

9. When holdings are for a set period, i.e. current 5 years, and the library is still receiving issues of the title, use
CURRENT•5•YRS

10. If only one volume or year is held by the library, indicate with ONLY after the holdings statement

V.•25(2003) ONLY

11. If both print and electronic holdings are held for a title, separate the different formats with a semi-colon and the term Electronic Access

V.•1(1970)•-•;•Electronic•Access•V.•30(2000)•-
V.•1(1970)•-•25(1995)•-•;•Electronic•Access•only•V.•30(2000)•-

12. If library holdings are remote from the library and would require a longer time to retrieve the article, start the holdings statement with a * symbol

*V.•20(1995)
6.7 Updating All Your Holdings

Holdings can be updated:
- individually using the Search button
- updated all at once using the "holdings update" in Administration section
- by adding electronic subscriptions

The guidelines below show how to update all your holdings through a simple import function. See the "Electronic collections" instructions for further information on subscribing to a consortia collections.

Detailed instructions for Updating all your holdings

1. Click on the Administration button.

2. Click on Update Holdings link

3. In this page you can update some or all of your holdings in a single process.
4. *Note* - a good starting point if you already have holdings loaded is to first use the export your existing holdings link to download your current holdings in spreadsheet format.

Your holdings may be formatted using a spreadsheet or database and output in spreadsheet may be viewed at [importsample.xls](http://example.com/importsample.xls). An FAQ on uploading holdings is available at [uploading_your_holdings.pdf](http://example.com/uploading_your_holdings.pdf).

You can also export your existing holdings.

5. You should now prepare your holdings for import into GRATISNET. Your holdings can be prepared in a spreadsheet. The minimum information is:
   - Journal title
   - ISSN
   - Holdings

You can prepare this information in a spreadsheet or in a TAB delimited text file.

6. Note the option to clear your existing holdings first - use this if you are planning to refresh your entire collection profile.

   Warning: your whole existing holdings will be cleared.
7. If your holdings are > 60000 characters in length, you should save the file as a text, TAB delimited file and use the BROWSE option to process the file. Otherwise you can paste your holdings directly from your spreadsheet to the text box.

Click the Process button to proceed.

8. You will be presented with a processing confirmation page. Any exceptions, especially where a match by ISSN or title was not possible, will be presented. Review these exceptions. Generally you have the option to:
   a) match against another existing title
   b) add the journal/report as a new entry in GRATISNET
6.8 Listing and Editing Holdings and Missing Issues (Through 'My Holdings')

You can list all your print, electronic holdings and your missing issues using the 'My Holdings' page. You reach this from the home page using the "view/edit my holdings" link (see below).

Holdings can also be updated:
• individually using the Search button
• updated all at once using the "holdings update" in Administration option
• by adding electronic subscriptions

The guidelines below show how to update your holdings for an individual title using the My Holdings link. See the "Electronic collections" instructions for further information on subscribing to a consortia collection.

Detailed instructions for Updating your holdings and missing issues (through 'My Holdings')

1. Go to the GRATISNET
   • intranet home page. Look for the View/Edit My Holdings link and click this link.

2. You will see a list of holdings divided into three sections:
   1. Your print holdings
   2. Your electronic holdings
   3. Your missing issues

   There is a link at the top of each section to help move between each list.
3. Simply click the edit link against the holdings you wish to edit.

The holdings maintenance page will be displayed. Enter the following information:

**URL** - a link to your internal OPAC, if required

**Formats held** - Indicate your print and electronic holdings

**Delivery** - Indicate your lending conditions - by default both print and electronic delivery will be allowed

**Holdings** - Supply your holdings statement - refer to section 6.6 for guidelines on formatting your holdings

**Missing issues** - Indicate your missing issues - you will then receive email alerts if duplicates are registered for these missing issues.

You can use the **Preview Holdings** button to preview how your new holdings statement will look in the INDEXILILSYSTEM search page.
4. If you have missing issues for this journal, you can enter these missing issues at the bottom of this page (scroll down)

   Missing Issues (optional)

   2005: 23 (1,2)

   Missing issues will be matched against your library address where duplicates are declared corresponding to your missing issues (on a best match basis). Matches will be improved if you supply your missing issues as follows:
   - year: volume (issues) - eg
   - 2005: 23 (1,2)
   - 2006: 24 (1-12,14), 25

5. Click the Save button to save your holdings amendment
6.9 Updating Holdings and Missing Issues (Through SEARCH)

The guidelines below show how to update your holdings for an individual title using the Search button.

Detailed instructions for Updating your holdings (through SEARCH)

1. Perform a journal title search (see the separate instructions on this). On the search results page, click on the Journal Title (from the ranked display of library holdings)

   **JOURNALID = 298695**

   ![Journal Details]

   Click on a NUCIS code to place an ILL Request
   Click on a Title to Add or Review holdings or to Order the title

<table>
<thead>
<tr>
<th>#</th>
<th>ISSN</th>
<th>Title &amp; Holdings</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1087-3244</td>
<td>American Journal Of Health Behavior</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Formerly: Health Values</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Publisher: Star City, WV : PNG Publications, c1996-</td>
</tr>
<tr>
<td></td>
<td></td>
<td>NHDL (nsw) V. 20(1996) - v. 29(6)2005</td>
</tr>
<tr>
<td></td>
<td></td>
<td>NBB (nsw) ProqH&amp;M 01/01/2003-Current</td>
</tr>
<tr>
<td></td>
<td></td>
<td>NGDH (nsw) ProqH&amp;M 01/01/2003-Current</td>
</tr>
<tr>
<td></td>
<td></td>
<td>NHCW (nsw) V. 20 No. 1(1996) - 22 No. 6(1998)</td>
</tr>
</tbody>
</table>

2. The journal details page will be displayed. If you do not currently have holdings you will see a link Add to NUC link. If you have holdings you will see an Edit NUC link. Click this link to add/edit your holding

3. The holdings maintenance page will be displayed. Enter the following information:
URL - a link to your internal OPAC, if required

Formats held - Indicate your print and electronic holdings

Delivery - Indicate your lending conditions - by default both print and electronic delivery will be allowed

Holdings - Supply your holdings statement - refer to section 6.6 for guidelines on formatting your holdings

You can use the Preview Holdings button to preview how your new holdings statement will look in the INDEXILILSYSTEM search page.

4. If you have missing issues for this journal, you can enter these missing issues at the bottom of this page (scroll down)

Missing issues will be matched again duplicates and you will receive an alert your library address where duplicates declared corresponding to your missing issues (on a best match basis). Match will be improved if you supply your issues as follows:

- year: volume (issues) - eg
  2005: 23 (1,2)
  2006: 24 (1-12,14, 25
5. Click the **Save** button to save your holdings amendment
7. Reports

Inter-Search has a built in report writer for libraries, inter-library loans, holdings and other information. Using this report writer, it is possible to generate a flexible range of reports according to your needs. Most commonly, this report writer is used to generate statistics on inter-library loans. The following section has examples on how this can be done.

Special reports are available on:
* summary statistics by library
* Duplicate holdings by ISSN and Title
* Duplicated journal title entries

Some of these reports are managed through the state or national login.
7.1 Summary Statistics

The summary statistics report provides you with inbound and outbound request counts for your library in the network.

State and national network administrative logins can be used to produce inbound and outbound statistics on a state-by-state and national basis.

Detailed instructions for Reports - Summary statistics

1. From the home page, look for the My Statistics link

2. You can select the date range for your request.

   (1) Report by date range

   From the following Start Date 2008-07-01
   Up to (but not including) the following End Date 2008-10-01
   Generate the report for the above dates

3. Click the Generate button to see your summary statistics

4. The report output shows your holdings, inbound requests and outbound requests for the specified date range.

   Library Holdings Summary 2008-07-01 up to 2008-10-01

   Select different dates
   Library NUC Holdings Outbound requests Inbound requests
   NTEST2 1 0 0
7.2 Detailed Statistics

The detailed statistics report provides you with inbound and outbound request counts for your library in the network.

Date ranges can be specified, and the report can be produced in HTML format for import into spreadsheet or database using CSV format.

Detailed instructions for Reports - Detailed request statistics

1. From the home page, look for the Edit My Library Details link.

2. Click on the Inbound requests or Outbound requests link against your NUC depending on the information you wish to report on (you cannot report on both at once).

3. Look for the Report button on the top right hand side of this page. Click on this button.

4. You can select the date range for your request. Note the format is YYYY-MM-DD and don't forget to specify the range indicator =,>,< etc

5. Checkbox each of the columns you want to see in your report.

6. Select the SORT ORDER for your report. Timestamp will give you the items in chronological order.
7. Select your preferred report format.

8. Click the **Report** button to see your summary statistics.

9. The report output shows your detailed ILL requests.
7.3 Member Directories

On the Search page you can find a several printable directories of GRATISNET members.

- The full directory of members (printable) - this is a detailed directory containing library address, opening hours, and primary contact details
- A printable staff directory (includes Staff entries from the Contacts database) - this extends the member directory by providing other library staff details (when registered)
- The contact directory by Login/NUC (phone fax email only - printable) - a contact report with summary information of Login/NUC
- The contact directory by Institution (phone fax email only - printable) - a smaller contact report with summary information of phone/fax/email

Detailed instructions for Reports - Member directory (short and long)

1. Go to the GRATISNET intranet home page. Look for the Search button in the left hand menu - click this button.

2. Click on the link for the report you want to produce. Be patient - some reports can take a while to complete.
7.4 Members Lending Books

On the Search page you can find a printable directories of GRATISNET members that lend books.

Detailed instructions for Reports - Member directory (short and long)

1. Go to the GRATISNET intranet home page. Look for the Search button in the left hand menu - click this button.

2. To the right of the DIRECTORIES button you will see a "members lending books link".

3. You can also use the BOOKS button to send an email request to member libraries lending books (see Section 3)
8. List Serve

A list serve provides a means for community exchange of messages, ideas and notices both online and through email. The Prosentient Systems list serve allows users to send and receive list serve messages by posting messages in the Inter-Search Forums at listserve.prosentient.com.au or through email by emailing the desired list.

8.1 Logging On To The List Serve

The list serve has a web user interface that can be accessed directly by browsing to listserve.prosentient.com.au or by clicking on the Listserve button in the left-hand menu.

Detailed instructions for Logging on to the List Serve

2. Enter your username and password and then click the Login button.
8.2 Navigating Around The List Serve

Detailed instructions for Navigating around the List Serve

1. To return to the List Serve home page, you can click the Prosentient Systems Forum Index hyper link. This link is displayed on all pages within the forum so you can always return to the Home page from any location.

2. The forums for the group that you belong to will be displayed on the List Serve home page. Your membership will determine which forums you are permitted to view, so all of the forums in the images below may not be relevant to you.

To view a forum, click on the forum name.

3. To view an existing topic, you can click on the topic name. Clicking on the topic name will take you into the topic where you can view the topic contents and description, and also the comments and responses that have been posted.
Announcement: Groupwise 7 email printing of Grasisnet requests

- International Journal of Clinical Practice

Journal contents pages service/copyright
8.3 Creating And Viewing Topics And Replies

Detailed instructions for Creating and viewing topics and replies

1. Once you have selected the forum that you would like to view, you can view an existing topic by clicking on the topic name. Clicking on the topic name will take you into the topic where you can view the topic contents and also the responses that have been posted.

2. To post a reply, you can click the Post Reply button, and to create a new topic of your own you can click the New Topic button.

3. The new topic and new reply form are identical. They both consist of a subject, message body, and attachments section.

   There are a number of style options that you can select from, these include font colour and size. You can make the text bold or italic by clicking on the corresponding icon.

   To add an attachment you can click the browse button and locate the attachment and enter a comment if required, then click the Add Attachment button.

   You can preview the topic or reply before it is posted by clicking on the preview button,
and when ready to post, you can submit the post by clicking the **Submit** button.
8.4 Forum Subscriptions

The forum subscriptions section allows users to subscribe and unsubscribe to mailing lists.

**Detailed instructions for Forum Subscriptions**

1. Click on the **Forum Subscriptions** icon towards the top of the page.

2. On this page you will be able to view the mailing lists that you are currently subscribed to and any new lists that you join.

3. To subscribe to a new mailing list, check the box for the list that you wish to join and click the **Subscribe Selected** button.
4. To unsubscribe from a mailing list, check the box for the list and click the **Unsubscribe selected** button and you will be removed from this mailing list.
8.5 Registering New List Serve Email Addresses

When sending emails through the List Serve the “sending” email address must be registered in the List Serve otherwise the email will be treated as spam and quarantined. This can be avoided by registering your email address with the List Serve. Multiple List Serve emails can be registered for a single library.

Detailed instructions for Registering new List Serve email addresses

1. Log into GRATISNET at and click the Edit My Library Details link.

2. Click on the ListServe Logins tab to display the current List Serve email addresses and logins that are registered for your library.

3. Enter the new email address and contact name and click the save button.

4. Existing email addresses and contacts can be deleted by clicking on the delete button corresponding to the account that you wish to delete.
8.6 List Serve Attachments

You can send attachments in your emails to the list serve or when posting online. The list serve saves these attachments as a file on the web server and sends a link with the list serve email. The link(s) are added at the end of your email, so they can be missed by people receiving the email.

Therefore, when sending attachments it is worth adding the following comment to the beginning your email or posting:

ATTACHMENTS TO THIS EMAIL WILL APPEAR AS LINKS AT THE END OF THE EMAIL
8.7 List Serve Etiquette

Keep in mind that when you post a message to the GRATISNET List Serve, all subscribed List Serve members in all states are reading the message. **Therefore it is important not to clog up the List Serve with unnecessary messages.** Here are a few etiquette rules to remember:

- Include a signature tag on all messages. Include your name, NUC symbol, Library name and your e-mail address.
- Use a specific and concise topic for the subject line.
- Reply to the entire list serve if everyone will benefit from the information. If you would like to thank someone for his or her response, please send your message directly to that person, not the entire list.
- When replying to duplicates lists, please reply only to the offering library. Most libraries would appreciate only your needs being sent not the whole duplicates list again.
- Unnecessary broadcast responses are the most common (and annoying) mistake new list serve users make. Use your "reply" button ONLY if you really want to send a response to everyone. In all other cases, paste the sender's e-mail address and "subject" at the top of a brand new e-mail message, and send your response to that person only.
- If your e-mail or fax is not working, please change your details on the GRATISNET website. By removing your e-mail address from your details page, only a fax form will be automatically generated. If your fax is not working please put a message in the notes field and it will display when the request form is viewed.
- Be respectful of the opinions of others. Resist the urge to "flame" someone. Flaming is harsh criticism intended to be destructive and hurtful. Treat others as you would like to be treated. If you have a problem then please contact your State Co-ordinator.
- If your library is going to be closed, please use the "Temporary Closure" section on your library's detail page. There is no need to post a message to the list serve.
- We hope that by following these simple rules it will make our e-mail boxes emptier and our lives easier. A Google search on "list serve etiquette" produces many other hints to keep in mind when posting messages.
9. Duplicates Module

The duplicates module is designed to simplify the fulfilment process for libraries declaring and supplying duplicates. The following procedures are divided into instructions for the Supplying Library and instructions for libraries requesting from available duplicates.

SUPPLYING LIBRARY PROCEDURES

The process of declaring duplicates is divided into 3 simple phases:

- Declaring your duplicates - you load your list of duplicate journals or books/reports and an email goes out to those members subscribing to the duplicates list
- Producing delivery lists - members will select which items they want and these will automatically be removed from available duplicates. At the end of the duplicates availability period you nominated when declaring the list, you can produce delivery lists showing those libraries that have requested items off the list
- Closing your duplicates list - Once you have produced your delivery lists, you can close the duplicates
9.1 Declaring Duplicates

You need to prepare a text file with your duplicates. The format for journals is very simple.

*For journals* leave a blank line between each book/journal. The Journal format is:

Title
Year: Volume (Serial,Serial,Serial-Serial)
*e.g.*
The Journal of Unorthodox Medicine
2005: 23 (1,2)
2006: 24 (1-12,14), 25 (1-4)

*For books/reports* use the format:
Title<tab>Year<tab>ISBN<tab>Quantity

Detailed instructions for Loading Duplicates

1. When your duplicates list is ready, log into GRATISNET and click on the **Duplicates** button.

2. From the menu tab, click on "LOAD DUPES". Select the duplicates type (Journal/Book), how long the list will be available, and use the BROWSE button to locate your text file, click on “Upload your duplicates list. You will then be asked to confirm or remove your list - review the list of duplicates shown.

   If there are some errors - just click REMOVE THE LIST AND RE-LOAD

   If it looks OK - just click APPROVE THE LIST - your duplicates email will go out to the libraries.

   Libraries will receive an email and can select the items that they want to request. These will immediately be removed from the available selection list.
3. Where other libraries have declared Missing Issues in their holdings, these libraries will be emailed with an alert if your duplicates match their missing issues.
9.2 Reviewing "My" Duplicates

Detailed instructions for My Duplicates

1. The supplying library can review the list of duplicates currently published using the MY DUPLICATES tab in the DUPLICATES module.

   You can use this option to:

2. The supplying library can "Republish" the duplicates email for the list (click on the re-announce link)

3. The supplying library can Review and remove any items that should not be on the list - they will be immediately removed from the list of available items
Manage duplicates offered by NTEST

Select items you wish to remove from your duplicates list.

<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Year</th>
<th>Vol</th>
<th>Issue</th>
<th>City</th>
<th>Avail</th>
<th>Exp</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>OBSTETRICAL &amp; GYNECOLOGY</td>
<td>2000</td>
<td>5</td>
<td>9</td>
<td>1</td>
<td>3/3/200</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>LOGICAL SURVEY</td>
<td>2000</td>
<td>5</td>
<td>10</td>
<td>1</td>
<td>3/3/200</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>OBSTETRICAL &amp; GYNECOLOGY</td>
<td>2000</td>
<td>5</td>
<td>11</td>
<td>1</td>
<td>3/3/200</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>LOGICAL SURVEY</td>
<td>2000</td>
<td>5</td>
<td>12</td>
<td>1</td>
<td>3/3/200</td>
<td></td>
</tr>
</tbody>
</table>
9.3 Selecting And Requesting Available Duplicates

When you receive an email declaring available duplicates you can fulfil the request by either of two ways:

- **Method 1** - follow the instructions on the email to nominate and request the duplicates listed in that email
- **Method 2** - online - follow these simple steps

**Detailed instructions for Selecting from Available Duplicates**

1. Log into GRATISNET and click on the **Duplicates** button.

2. A list of available duplicates will be shown.

   Use the **Limit** option to limit the list of journals to only those journals or library you wish to select. Alternatively paste in a journal "wish list" to the big text box and click **LIMIT BY THE ABOVE WISH LIST**.

3. Checkbox the issues you want to request & click **PROCESS YOUR SELECTONS** - note the **SELECT ALL ITEMS ON THIS PAGE** if you want everything shown.

4. On the review page, click **CONFIRM QUANTITY** - you will receive a confirmation page showing that your selections have been processed.

After the list expiry time, the supplying library will process & deliver your selections.
<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Issue</th>
<th>Quantity Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>11</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>2002</td>
<td>12</td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>
9.4 Creating Delivery Lists

After the list expiry time that you specified when uploading the list, you should receive a reminder email to create your delivery lists and close the duplicates list. The delivery list facility is designed to help save time in allocating and delivering the duplicates.

Detailed instructions for Delivery Lists

1. From the Duplicates menu, click on the Delivery Lists tab.

   You can then select individual libraries or click the button "SELECT ALL ITEMS ON THIS PAGE" to select all libraries.

2. Click on CREATE PICKLIST to produce a printable address and pick list of requests for each requesting library. This can be printed and used for selection and delivery of the duplicates.
9.5 My Duplicates Requests

If you decide that you do not require a selected duplicate (as the requesting library), or if you wish to review what duplicates you have selected, click on the Duplicates menu and select the My Requests tab.

Detailed instructions for My duplicates requests

1. You will see a list of duplicates that you have requested which have not yet been processed by the supplying library. You can checkbox and REMOVE the items you no longer require - they will then be immediately available for another library to select.
9.6 Closing A Duplicates List

After you have delivered the requests, you can either just close the list or forward the list on to ALIADUPS.

**Detailed instructions for 9.6 Closing the list**

1. Click on the **Close List** button in duplicates - you will see a list of each duplicates "bundle" you have declared (a single line for each declared set of duplicates).

   Checkbox the list(s) you want to close and click the **Close These Duplicates Lists** button.

2. Choose whether you want to forward this list to the ALIADUPS list serve for further processing. This will generate an email for your library to ALIADUPS. It may take 1-2 days for the email to be reviewed and processed.

   *Click **CLOSE AND REMOVE** below to remove all unallocated duplicates.*

   OR

   *Click **CLOSE AND SEND** to send remaining duplicates to the aliadups list.*
A. Administrative Functions

The administrative functions of GRATISNET allow a range of functions to manage journals and holdings and to communicate to network members. Some functions in this menu are available only under the network administrative logins for each state.

Libraries may perform the following functions on this page:
Libraries - All libraries currently registered in the network and the Holdings for each member. Library statistics can be viewed from this page. You can search for a particular library using the search facility (type a NUC, name or email and click the Directory button).

- Add a Journal Title - Add a new journal/title to the database
- Journals - The Journal Title database. New Journals can also be registered here
- Update holdings - Bulk upload of holdings for a library
- Electronic collections - Administer, join and leave electronic collections
- Union List - Printable network union list (long!)

Detailed instructions for Administrative functions

1. From the GRATISNET home page click the Administration button

2. Click on the link for the administrative function you wish to perform.

   Administration

   - Libraries - All libraries currently registered on the system and the Holdings for each member search for a particular library using the search facility (type a NUC, name or email and click the DIRECTORY button).
   - Add a Journal Title - Add a new journal/title to the database.
   - Journals - The Journal Title database. New Journals can also be registered here.
   - Update holdings - Bulk upload of holdings for a library.
   - Electronic collections - Administer, join and leave electronic collections.
   - Union List - Printable network union list (long!).

3. Network-wide administrative functions appear only when you are logged in using a state or national login.
Administration

- **Libraries** - All libraries currently registered on the system and the Holdings for each member search for a particular library using the search facility (type a NUC, name or email and click the DIRECTORY button).
- **Add a Journal Title** - Add a new journal/title to the database.
- **Journals** - The Journal Title database. New Journals can also be registered here.
- **Update holdings** - Bulk upload of holdings for a library.
- **Electronic collections** - Administer, join and leave electronic collections.
- **Union List** - Printable network union list (long).
- **Merge by duplicate Journal Title** - Review and Merge Duplicate Titles (by Title Name).
- **Merge by duplicate ISSN** - Merge Duplicate Titles (by ISSN).
- **Update Ranking - using Statistics** - Update state rankings using request history.
- **Update Ranking - using supplied file** - Update state rankings using a supplied ranking file.
- **Send Emails** - Broadcast emails to network members.
- **Create Bibliographic Import definitions** - Create bibliographic import definitions for the Re system (you can upload or paste bibliographic references and raise ILL requests for these references).
- **List Serve Administration** - Search the list serve members & add members (Administrators). For automatic creation of ILL requests based on saved database searches.
- **Duplicate Holdings Report** - Report on duplicated holdings statements by title and ISSN.
- **Statistics and Holdings Summary by Library** - A count of holdings by Login/NUC.
- **Library Administration** - Super-user library admin.
- **Update all electronic collections**
A.1 Updating Statistics

The statistics report provides you with inbound and outbound request counts for all libraries in the network.

State and national network administrative logins can be used to produce inbound and outbound statistics on a state-by-state and national basis.

Detailed instructions for Reports - Summary statistics

1. From the home page, click on the **Administration** button.

2. You can select the date range for your request.

   ![Administration Button](image)

3. Click the **Generate** button to see your summary statistics.

4. The report output shows your holdings, inbound requests and outbound requests for the specified date range.

   **Library Holdings Summary 2008-07-01 up to 2008-10-01**

<table>
<thead>
<tr>
<th>Library NUC</th>
<th>Holdings</th>
<th>Outbound requests</th>
<th>Inbound requests</th>
</tr>
</thead>
<tbody>
<tr>
<td>NTEST2</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

5. From the **Administration** page you can also use the functions to update your library statistics manually or automatically (using the GRATISNET statistics):

   - **Update Ranking - using Statistics** - Update state rankings
   - **Update Ranking - using supplied file** - Update state rankings
A.2 Updating Statistics Using Automated Calculations

has a facility for automatically generating your ranking. Rankings can be calculated on the basis of load (inbound as a ratio of outbound) or holdings.

Rankings updates can be performed on a state-by-state basis. The state administrative login is needed to perform a rankings update.

Detailed instructions for State Ranking Updates

1. Make sure you log in to the State administrative login for your State.

2. Go to the GRATISNET intranet home page. Look for the Administration button in the left hand menu - click this button.

3. Select the Update rankings from statistics link in the Administration menu

   Update Ranking - using Statistics - Update state rankings using request history

4. IF YOU WANT TO UPDATE FROM THE STATISTICS (INBOUND AS A RATIO OF OUTBOUND) then use option 1 and specify the dates on which the statistics will be calculated and click the button UPDATE RANKINGS USING THE ABOVE DATES

   Update rankings using the above dates

5. IF YOU WANT TO CALCULATE RANK BASED ON HOLDINGS, select option 4 by clicking the button UPDATE RANKINGS BASED ON HOLDINGS

6. You will receive a report on the revised rankings
## G - Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBCode</td>
<td>BBCode is a restricted variant of HTML that allows limited markup in web-based text boxes (eg bold, italic, including images) while preventing code insertion of more dangerous HTML code</td>
</tr>
<tr>
<td>Cookies</td>
<td>This site uses session cookies. These small items of information are used to allow us to identify your access to our system. They are destroyed when you close your browser and when you log off</td>
</tr>
<tr>
<td>CSV</td>
<td>Comma Separated Variable list - a common output format which can be imported into Excel and databases. Each row comprises one record/line and each column is separated by commas</td>
</tr>
<tr>
<td>CYO</td>
<td>Current Year Only</td>
</tr>
<tr>
<td>DX</td>
<td>DX Mail is a private document exchange service</td>
</tr>
<tr>
<td>EFREE</td>
<td>EFREE is a &quot;library&quot; containing all currently registered open access journals, including their embargo information if known</td>
</tr>
<tr>
<td>Embargo</td>
<td>An embargo is a period of time during which electronic copies of a journal are not available. For instance a journal provider may not allow the electronic version of an open access journal to be accessed for the first 12 months after publication. Embargo rules vary according to provider and the licensing restrictions of the journal publisher</td>
</tr>
<tr>
<td>FAQ</td>
<td>Frequently Asked Questions</td>
</tr>
<tr>
<td>HTML</td>
<td>Hyper Text Markup Language - web pages and web forms are coded using HTML</td>
</tr>
<tr>
<td>ILL</td>
<td>Inter-Library Loan</td>
</tr>
<tr>
<td>Inter-Search</td>
<td>Inter-Search Inter-Library Loan System - has been developed by Prosentient Systems and is used by over 400 libraries in Australia/New Zealand</td>
</tr>
<tr>
<td>Intranet Home Page</td>
<td>The intranet home page is the first page you see when you log in. You can reach this by clicking on the Home button</td>
</tr>
<tr>
<td>ISBN</td>
<td>International Standard Book Number</td>
</tr>
<tr>
<td>ISSN</td>
<td>International Standard Serial Number</td>
</tr>
<tr>
<td>NUC</td>
<td>NUC is your library login id and call sign (&quot;National Union Catalogue&quot;) OR otherwise known as NUCOS</td>
</tr>
<tr>
<td>OPAC</td>
<td>Online Public Access Catalogue</td>
</tr>
<tr>
<td>Open Access</td>
<td>Open Access is a term which refers to journals which are provided in electronic form with no access fees. Such journals often have an embargo period</td>
</tr>
<tr>
<td>PDF</td>
<td>Portable Data Format - An Adobe document encoding format popular for electronic document exchange</td>
</tr>
<tr>
<td>Resources area</td>
<td>The resources area is used to upload documents to be visible internally to network members, and as a temporary drop point for document delivery items such as PDF documents. Document Delivery items are automatically removed</td>
</tr>
</tbody>
</table>
after a month if they are not removed by the receiving library

| URL | Uniform Resource Locator - or "website link" |