



# BaseDoc

Request Management System

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## Introduction

Our literature search and article request system, BaseDoc, allows library members to submit requests and searches online, track progress and view details of past and present requests. The system can also email you at key stages of the process, such as when your article arrives for collection.

## Registration

Register to use the system by completing a short form on the BaseDoc website at [www.basedoc.co.uk](http://www.basedoc.co.uk) . You'll need to know your library user ID (the number on your library card).

Complete the form on the right of the screen, ensuring you tick the box agreeing to the site terms and conditions. Hover your cursor

over the information points around the page to show help on each item in the form.

The screenshot shows the BaseDoc Request Management System interface. At the top left is the BaseDoc logo with the text 'Request Management System'. At the top right is a 'Login' box with fields for 'User ID' and 'Password', and a 'Go' button. Below the logo is a 'Welcome to the BaseDoc Request Management System' heading, followed by the text: 'BaseDoc allows registered Library members to submit online article requests and track order progress'.

There are two main sections: 'Login' and 'Register'.

**Login Section:** It has a heading 'Login' and the text 'If you're already registered, enter your login details below >'. It contains fields for 'User ID' and 'Password', a 'Login' button, and a link 'Forgot your password?'.

**Register Section:** It has a heading 'Register' and the text 'Register below for access to the online article request service >'. It contains several fields: 'Home Library' (a dropdown menu), 'User ID' (with a help icon), 'Title' (a dropdown menu with 'Mr' selected), 'Name' (with a help icon), 'TrustSite' (a dropdown menu), 'Department' (a dropdown menu), 'Work Address', 'Post Code', 'Work Phone', 'Mobile', 'Email' (with a help icon), 'Confirm Email', 'Password' (with a help icon), and 'Confirm Password'. At the bottom of the register form is a checkbox for 'I agree to abide by the BaseDoc Terms & Conditions' and a 'Register' button.

**Help Section:** It has a heading 'Help' and three bullet points:

- **I don't know my User ID**  
Your User ID is the 7 digit number on the back of your library card. Your Home Library can help with this.
- **I'm a Library member but I don't have a password**  
Library members need to register before using the BaseDoc system. Fill out the form opposite to join.
- **I registered but I still can't login to the system**  
Your account needs to be validated by your Home Library before you can use the system. This should be done within a couple of days, after which you will be emailed to say your account is ready.

Once submitted, your application will be sent to us, and we will check your details against the Library Management System to authenticate your application.

Assuming everything checks out, we will verify your account and send you an email to confirm you can now begin placing requests.

## Using BaseDoc

Browse to the BaseDoc home page at [www.basedoc.co.uk](http://www.basedoc.co.uk). In the login box, enter your User ID (the number on your library card) and

your library password. If you have forgotten your User ID or password, please contact your home library.

The screenshot shows the BaseDoc Request Management System interface. At the top left is the BaseDoc logo. The top right shows the user's name 'SBC User (sbuser)', login date '30 Jun 2018', and a login form with fields for 'User ID' and 'Password'. The main heading is 'BaseDoc Main Menu for SBC User (sbuser)'. Below this is a paragraph of instructions: 'Click on any request column heading to display your requests sorted by that column. Click "Details" to show the actions taken on your request (click again to hide the details). Click "Note" to add further notes to your request after it was submitted. Click "Cancel" to cancel your request (this may not be possible if the request has already been ordered). Click "Change Your Details" to change your personal details of preferences.'

The interface is divided into several sections:

- Account Details:** A table showing user information for 'SBC User (sbuser)'.
 

Phone	0121-465 8200	Home Library	SBC
Mobile	not available	Trust	BCMC
Email	richard.mah@bham.ac.uk	Department	Medical
Work Address	Clinical Library, Moseley Hall Hospital, Wootton Road, Moseley, Birmingham, B13 2LJ		
Staff Group			
Payment Type	cash	Payment Date	Free
Delivery Ref.	email	Expiry Date	31st Dec 2018
- Request Statistics:** A table showing request counts.
 

Cancelled	Complete	New	Ordered	Pending	Refused	Rejected	Unfulfilled	Top
0	1	0	0	0	0	0	1	2
- Current Requests (0):** A section indicating 'You have no current requests.'
- Current Literature Searches (0):** A section indicating 'You have no current literature searches.'
- Completed Requests (2):** A table showing completed request details.
 

ID	Date Issued	Performance	Delivery	Date Complete	Status	Notes
004	17th Dec 2012	next journal by mika, 2012, (3 p), next article by mika email		17th Dec 2012	complete	Details
008	28th Oct 2012	Journal of Inorganic Carbonates; next, (5 p), next	via	28th Oct 2012	unfulfilled	Details
- Completed Literature Searches (1):** A table showing completed search details.
 

ID	Date Issued	Topic	Delivery	Date Complete	Status
04	18th Jan 2011	The environmental management of challenging behaviour in dementia patients	email	18th Jan 2011	complete

Your BaseDoc Home Page is split into four sections. On the left of the screen is the function menu from where you can request articles or searches, or change your details.

At the top of the main window is your account information. Please ensure this is up to date as it is used to send your requests to you.

Underneath are your current article requests and searches and their status. By default they are shown in reverse chronological order but you can change the display order by clicking on the appropriate column heading. Click 'details' to see all the actions that have been carried out on a particular request.

At the bottom of the main screen are your completed requests – those which have been sent to you, cancelled, rejected or found to be unobtainable – and your completed searches. Again, you can change the display order by clicking on the appropriate column heading.

## **Requesting an article**

Use the Request an Article link to display a blank article request form. Fill out as many details as you have for the article reference. Journal title, year and article title are compulsory fields. Ensure you enter the full journal title as accurately as possible as this will be used to check electronically for online stock holdings.

In the additional fields section, enter any notes you may wish to pass to library staff regarding your request and select your preferred method of delivery (we will do our best to send your article by this method but this is not always possible).

Choose a payment method and upper payment limit you are willing to pay if the article incurs a cost. Should the article charge exceed your limit, library staff will contact you to see if you wish to proceed.

Please note that account facilities are only available by prior arrangement – contact library staff if your department is interested in setting up an account for article requests.

## Article Request

Enter your request on the form below. Please ensure your address and email are up to date. Fields marked with a \* are compulsory.

Home

---

Request an article

Request a Literature Search

---

Change Password

Change your Details

---

Help

Logout

Your Details			
Name	SR 280 User (jstuart)	Home Library	SR0
Phone	0121 488 5283	Email	frank.j.stuart@liverpool.ac.uk
Work Address	Central Library, Stanley Hall, Havelock, Waterloo Road, Stanley, Birmingham, B13 3LL		

  

Article Details			
Journal Title*	<input type="text"/>	Year*	<input type="text"/>
ISSN	<input type="text"/>	Volume	<input type="text"/>
Author(s)	<input type="text"/>	Part	<input type="text"/>
Article Title*	<input type="text"/>	Pages	<input type="text"/>

  

Additional info			
Title	<input type="text"/>	Delivery Point	<input type="text"/>
Payment Type	<input type="text"/>	Payment Limit	<input type="text"/>
Date Required	<input type="text"/>		

  

**Terms and Conditions**

This article will be supplied under the following terms and conditions:

- I have requested a copy of the above article, which is required for the purposes of non-commercial research or private study.
- I will not supply a copy of it to any other person, and I have not previously been supplied with a copy of the same material by my Home Library. To the best of my knowledge, no other person with whom I work or study has or intends to make, at or around the same time as this request, a request for substantially the same material for substantially the same purpose.
- On receipt of this item I understand I can only receive a single copy in print or electronic format.
- I understand that this declaration shall not be a breach and I shall be liable under the Copyright, Design and Patents Act 1988.

If you need to or are going to make multiple copies of an article (e.g. for a journal club) or if you are requesting the same article as a colleague (e.g. student assignment) then also tick for an alternative set of terms and conditions of supply.

If you are unable to agree to the above terms (e.g. request for commercial purposes) contact your Home Library as they may still be able to source the article for you with different terms and conditions.

Please tick the box below to agree to the above terms and conditions.

Do you agree to the above terms?

Date: 29 Jan 2015

Submit Request

Finally, if you agree to the displayed terms and conditions of supply, tick the agreement box at the bottom of the screen. If your request is for multiple copies, eg for a journal club, choose the alternative terms and conditions.

If the article is required for commercial reasons, contact library staff. We may still be able to source the article under a different set of terms and conditions.

## Tracking your requests

You can track your document request's progress from your User Home Page. The status of your request can be as follows :-

- Allocated - passed to a member of staff for actioning
- Cancelled - cancelled by you or by library staff
- Complete - supplied and collected/delivered
- New - a newly placed request, awaiting action by your library
- Ordered - ordered from another library
- Pending - the request is on hold (e.g:- awaiting payment or revised reference details)
- Received - arrived and awaiting collection or delivery
- Unobtainable - could not be sourced

Click 'details' next to a request to show further details on the actions.

## Requesting a literature search

Use the Request a Literature Search link on the menu to display a blank search form. Fill in as much detail as possible about your search, which is then submitted to the library. You will be able to track the status of your search and see details of current and past searches.

## Changing your details

You can set a new password, change your contact details, and set delivery and payment preferences here.

To change your library, trust or department, contact library staff.

## Help

The online help system provides comprehensive guidance on using BaseDoc. Please contact library staff if you need further assistance.