DOCLINE SERHOLD: UPDATING, SEARCHING, AND REPORTING

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WHAT IS SERHOLD?

- SERHOLD is the National Library of Medicine's (NLM) database of machine-readable serial holdings statements for biomedical serial titles held by U.S. members of the NLM-supported National Network of Libraries of Medicine® (NN/LM®) as well as selected Canadian and Mexican libraries. These holdings statements are linked to NLM's authoritative bibliographic data in LocatorPlus™

WHAT TITLES CAN BE ADDED TO SERHOLD?

- Participants are limited to reporting holdings for serial titles that are in NLM's LocatorPlus database.

- This database contains over 125,000 serial titles; augmented by the addition of non-NLM titles held in the NN/LM regions, Canada and Mexico.

- Serials designed for recreational reading will not be included.

- Since DOCLINE uses holdings records for routing, libraries may only add journal holdings for those titles for which they can provide interlibrary loan.

UPDATING SERHOLD

- DOCLINE can route on holdings information as soon as it is added or modified.

- NLM encourages all DOCLINE participants to add, modify, or delete holdings for their own library using the DOCLINE Serial Holdings module of the DOCLINE system.

- To eliminate the need for updating holdings data in both DOCLINE and OCLC, NLM now offers quarterly data transfer from SERHOLD to OCLC via the batch update function.

UPDATING SERHOLD—PROCESS

- Log in to DOCLINE (www.docline.gov) with institution's username and password
- Select SERHOLD tab

UPDATING SERHOLD—PROCESS

- Enter the NLM Unique ID for the Journal, ISSN, OCLC Number, or name of the Journal
- Ensure "My Library" is selected from the Filters box
- Practice:
  - Search for *Library Journal*
  - Search for ISSN 1091-0808
  - Search for NLM Unique ID 0230462
  - Search for OCLC Number 01645522

UPDATING SERHOLD—PROCESS ADDING JOURNALS

- SERHOLD identifies those journals not currently reported in an institution's SERHOLD and provide a screen for adding holdings

DOCLINE®

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Home | Requests | Serial Holdings | Institutions | Loansome Doc Patrons
Update/View | Reports

Search criteria : 01645522(OCLC)

Search limit(s) in effect : My Library

Add Holdings

Title:	The New York times		
NLM Unique ID:	9877126	**ISSN:**	0362-4331 (Print)
Publisher:	H.J. Raymond & Co.],	**Place of Publication:**	New-York [N.Y. :
Publication Date:	1857-	**Frequency:**	Daily,
Continuation Notes:	Continues: New-York daily times.		

To add holdings, check the appropriate library or libraries

☑ New York University School of Medicine (New York, NY; LIBID: NYUNUM)

Retention Policy:

○ Retained for a limited period (6) ◉ Permanently retained (8)

Physical Format: Text (tu) ▾

Completeness: Information not available or Retention is limited (0) ▾

Commitment Level: No special commitment to retain title (Z) ▾

Acquisition Status:

○ Currently receiving (4) ○ No longer acquiring (5)

Holdings owned:

Begin Volume	End Volume	Begin Year	End Year

Insert Row | Delete | Reset | Delete All | Sort

Add | Return to Search | Reset | Help

UPDATING SERHOLD—PROCESS ADDING JOURNALS

- Indicate a retention policy:
  - Permanently retained
    - Acquisition Status
      - Currently Receiving or No Longer Acquiring
        - Indicate begin and end volume and years
        - Insert rows for broken collections
        - If currently receiving, there is no need to add end volumes or years; DOCLINE will add latest volumes as they are released
  - Retained for a limited period of time
    - Indicate the durations of holdings owned in months, years, or editions
    - DOCLINE will update records as appropriate

UPDATING SERHOLD—PROCESS ADDING JOURNALS

- Specify a physical format
  - Text for print collections
  - Computer File Remote for electronic collections
- Specify a completeness
- Specify a commitment level
  - Commitment level is taking on new significance as libraries become concerned about emergency and disaster planning
  - More and more consortia are asking libraries to indicate commitment level in order to identify institutions that will ALWAYS have a certain title

UPDATING SERHOLD—PROCESS UPDATING JOURNALS

- SERHOLD identifies those journals currently reported in an institution's SERHOLD and provides a view of the holdings

UPDATING SERHOLD—PROCESS UPDATING JOURNALS

- If you enter information for a journal you already own, DOCLINE will display your library's current information for the journal and offer you the opportunity to update.

- To update the record, simply click the Update button at the bottom of the screen.

UPDATING SERHOLD—PROCESS DELETING JOURNALS

- To delete a record, simply click the Delete button at the bottom of the screen.
- A confirmation window pops up asking you to confirm this action

UPDATING SERHOLD—PROCESS LISTING MULTIPLE FORMATS

- As more libraries now receive the same journal in multiple formats, DOCLINE's SERHOLD has adapted to allow for multiple format listings

- After clicking the Update button, simply click the Add Different Format button

- Update with the appropriate information

- Note that when the journal is searched for via SERHOLD, SERHOLD will attach the institution's LIBID twice to results, indicating two records with different formats listed.

SEARCHING SERHOLD

- DOCLINE Libraries can search the holdings of other members libraries via the SERHOLD screen in DOCLINE

- Search by NLM Unique ID for the Journal, ISSN, OCLC Number, or name of the Journal

- You may specify years and volumes owned or select a specific LIBID to search

- Searches may be limited to searching Library Groups, Region, Routing Table, State/Province, or outside Routing Table

- Additional filters include delivery methods, format, services (Rush, Urgent Patient Care, Color Copy) and EFTS participation
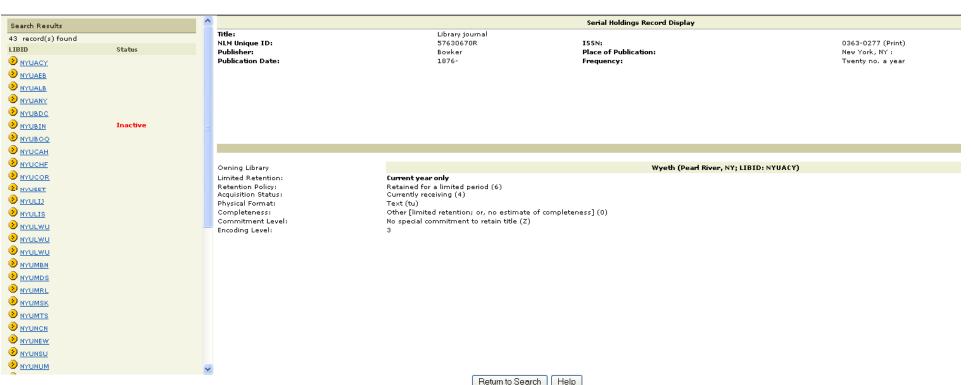
SEARCHING SERHOLD

- Search results appear in the right hand scroll-down screen
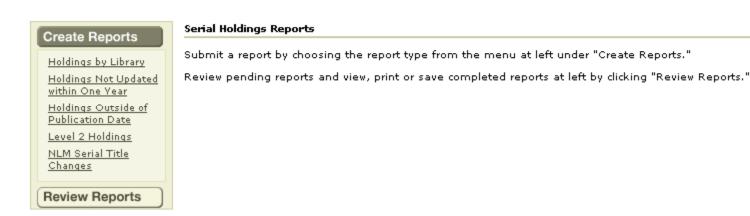
SEARCHING SERHOLD

- Search results are displayed alphabetically by LIBID.
- To view an institutions holdings, simply click on the blue LIBID
  - SERHOLD displays the library's name, retention policy, holdings, acquisition status, physical format, completeness and commitment level
- For contact information, click on the yellow button next to the LIBID.
  - View the library's contact information, services and membership, delivery methods, copy charges, and surcharges

REPORTING

- Each participating library can produce a list of its own holdings on demand. Participants are also able to view union lists of holdings for libraries in their own library group and in their own state or province. These union list products are updated quarterly.

REQUESTING REPORTS

- From the SERHOLD Tab, select the Reports button.
- Note: this is a new screen view launched in DOCLINE 3.3

REQUESTING REPORTS

- Available On-Demand Reports
  - Holdings By Library
  - Holdings Not Updated within One Year
    - A list of titles whose status has not been updated within the past year
  - Holdings Outside of Publication Date
    - A list of titles whose reported holdings are outside the actual publication dates of NLM's Locator Plus
  - Level 2 Holdings
    - A list of holdings that do not list volume or year holdings information.
  - NLM Serial Title Changes
    - Libraries should close holdings for old titles and create a new holdings record for the new title

REQUESTING REPORTS

○ Available reporting fields

Acquisitions Status	OCLC Number
Commitment Level	Physical Format
Completeness	Place of Publication
Continuation Notes	Publication Date
Date Added/Modified	Publisher
Encoding Level	Retention Policy
Frequency	Title
Holdings	Title Abbreviation
ISSN	
NLM Unique ID	

REQUESTING REPORTS

- Reports may be requested in multiple formats
  - HTML to view or print
  - CSV or comma-delimited for exporting to Excel or Access
  - MARC 21 for importing into library systems
- Reports generally take 2 hours to generate
- Ready reports will appear in the Activity Status box of DOCLINE's homepage or in the Review Reports sections of the Serial Holdings Reports screen
- Reports are deleted one week after it has been created even if the report has not be viewed

REQUESTING REPORTS

- DOCLINE provides quarterly union list reports for library groups and state/province.

- Quarterly reports are available in comma delimited and HTML versions

SERHOLD TO OCLC BATCH UPDATE

- The SERHOLD to OCLC Batch Update consists of several programs that were written by both NLM and OCLC to take summary holdings from DOCLINE Serial Holdings and add, update, or delete local data records (LDRs) in OCLC's WorldCat database based upon a match on the OCLC control number recorded in the 035 field of NLM's bibliographic record in the online public access catalog, LocatorPlus. These programs enable libraries to enter summary holdings into DOCLINE Serial Holdings and, in most cases, not have to rekey the same information into OCLC.

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SERHOLD TO OCLC BATCH UPDATE

- The holdings of all libraries that authorize NLM to send Serial Holdings to OCLC will be placed into a file and sent to OCLC once per quarter at January, April, July, and October.

- After the holdings that NLM provides to OCLC are extracted, NLM notifies libraries via DOCLINE Serial Holdings Reports of any known errors. It is up to the individual library to add these problem holdings to OCLC, to add a bibliographic record to OCLC when appropriate, and/or to notify NLM of OCLC numbers when the OCLC number is not in the LocatorPlus record. Error reports will only be supplied when there are known errors.

SERHOLD TO OCLC BATCH UPDATE

- OCLC uses the following data elements from the DOCLINE database to create OCLC Local Data Records (LDRs). If a field is in OCLC, but is not listed below, it will be null in OCLC after the batch update has occurred.
  - OCLC Number
  - OCLC Symbol 1
  - LIBID
  - NLM Unique ID
  - Holdings
  - Retention Policy
  - Acquisition Status
  - Physical Format
  - Completeness

SERHOLD TO OCLC BATCH UPDATE

- OCLC replaces the pre-existing set of local data records (LDRs) attached to a specific bibliographic record with the holdings records sent for batch updating.

- If your medical library, the science library, and the main library share the same OCLC code and all had holdings on the same title, the holdings for your library would be updated and the holdings for the other two libraries would be removed.