

# DOCLINE®

*VAMC BEDFORD, THU, Sep 24, 2009, 10am – 3pm*

## ROUTING TABLES & SERIAL HOLDINGS (SERHOLD)

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# Part A – ROUTING TABLES

- **Routing Algorithm**
- **Time Triggers**
- **Randomization -vs.- load balancing**
- **Free -vs.- Fee Zones**
- **Placement of Groups within Cells**
- **NER Guidelines**
- **Updating**
- **Populating RT with New Lenders**
- **Authorization**



# Part B – SERIAL HOLDINGS

- **Holdings Record Components**
- **Adding Records**
- **Modifying Records**
- **Deleting Records**
- **Applying Search Filters**
- **Searching Locatorplus**
- **\*NEW\*“All My Holdings” button**
- **Serials Holdings Report**

## A. Routing Algorithm

- DOCLINE's routing algorithm routes borrow requests to lending libraries, IF:
  - (1.) the lending institution holds either the volume /or year of the title;  
**AND**
  - (2.) the delivery method selected by the borrower is supported by the lending institution
- Boolean logic that best describes the set of logical operations:  
**((TITLE AND VOLUME) OR (TITLE AND YEAR)) AND METHOD OF DELIVERY**
- Software is designed to check ALL institutions in the cell 1 "pool" before moving on to subsequent cells.



## A. Time Triggers (1-3-go!)

### ➤ **FIRST TRIGGER (24 hrs)**

Once the system routes to a potential lender, the lender must first “receive” the request within 24 hours. IF the request is NOT “received” (receipted), then the system will re-route the request to another viable lender in the “pool”.

### ➤ **SECOND TRIGGER (72 hrs)**

If the request was “receipted”, but the lender does NOT fill or reject the request within 72 hours, the system will re-route the request to the next viable lender in the pool.

## A. Randomization

- ❖ Load balancing -- a technique to spread work between two or more computers, CPUs, etc., to obtain maximized throughput and a minimized response time. **DOCLINE does NOT use load balancing!**
- ❖ Randomization -- a core principle of statistical theory in the design of experiments. It is not haphazard, more of an art than a science, though numeric methods are employed.

### ***Examples of randomization:***

- *A random shuffling of cards*
- *A random sample of the population – “statistical sampling”*
- *Transforming a random stream of telecomm data via scrambler*



## A. Randomization

### DOCLINE utilizes randomization!

- Prior to the release of DOCLINE 2.7, the BHSL group employed a manual form of load balancing, but not the DOCLINE system !
- DOCLINE selects “randomly” from a pool of viable lenders, in pools up to 20 libraries.
- Don’t be confused! - DOCLINE routing has always been based upon randomization that matches potential lenders with borrower requests.







## A. Placement of Groups within Cells

- The option to place groups within routing cells began in 2006, with release of DOCLINE 2.7.
- Placement varies among the regions (for example: many libraries in western states place Freeshare in cell 1.)
- When not placed in a routing cell, groups remain “parked” in the “Workspace”. They may only be moved, not removed.
- State groups often get placed in lower or middle cells. Keep in mind: state groups often include Resource Libraries (RL’s). RL’s may be fee-based for in-state members.

## A. NER Routing Table Guidelines

- ✓ Relegate local & state consortia members to lower cells (#1-2-3.)
- ✓ Relegate "favorite lenders" to lower cells (#1-2-3.)
- ✓ If you decide to place a library group within a cell, NLM recommends placing group in cell by itself.
- ✓ When placing a group within a cell, keep in mind DOCLINE will match on first 20 lenders that meet criteria (*title, volume, year & delivery methods*) .
- ✓ When placing a group within a cell, consider one of the middle (#5-6-7) -or- higher cells (#8-9).



## A. Introducing New Lenders

### **METHOD A.**

Report 1-7: Library Routing Table and M/A/N Map cells containing my LIBID

Listed under *Reports* from **Requests** module

*Quid pro quo*: if library “xyz” has my library in cell 1 of their RT, maybe I should add them to my RT’s cell 1.

**\*\*\*\*\* Also check out statistical reports \*\*\*\*\***

### **METHOD B.**

*Searchbuilder* : Populating new lenders directly to your RT

# DEMO

*on how to bring lenders into the RT Workspace*



## A. Authorization

- Click **SAVE** frequently to save changes.
- Once completed with saving all changes, click **REQUEST APPROVAL**.
- Once changes are approved, changes are queued up for migration to production.



## A. Routine Maintenance

Start with the obvious -- “weeding out” / removing invalid lenders:

- ✓ **YES**      **Closed**
- ✓ **YES**      **Not a DOCLINE library**
- **NO**        Temporarily Not Taking Requests
- **NO**        Temporarily Inactive



# Part B – SERIALS HOLDINGS 4.0

- **Holdings Record Components**
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# B. Holdings Record Components

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

Update/View Reports

[Search](#) > [Titles](#) > Update [Return to Titles](#)

**Title:** jama AND (Filters)(My Library ) [Edit This Search](#)

<b>Title:</b>	JAMA : the journal of the American Medical Association	<b>Publisher:</b>	American Medical Association,
<b>NLM Unique ID:</b>	7501160	<b>Place of Publication:</b>	Chicago :
<b>ISSN:</b>	1538-3598 (Electronic) 0098-7484 (Print)	<b>Publication Dates:</b>	1960-
<b>Continuation Notes</b>	Continues: Journal of the American Medical Association.		
<b>Frequency:</b>	Weekly		

**University of Massachusetts Medical Center (Worcester, MA; MAUMAS)** **Holdings information**

[ADD FORMAT](#)

**Format:** Text [Edit](#)

**Vols/Years:** v.173(1960)-

**Completeness:** Information not available or Retention is limited

**Commitment:** No special commitment to retain title





## B. Adding Records

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[Home](#)

[Requests](#)

**[Serial Holdings](#)**

[Institutions](#)

[Loansome Doc Patrons](#)

[Update/View](#)

[Reports](#)

[Search](#) > [Titles](#) > [Holdings](#)

[Return to Titles](#)

Title: jama AND (Filters)(My Library )

[Edit This Search](#)

<b>Title:</b>	JAMA : the journal of the American Medical Association	<b>Publisher:</b>	American Medical Association,
<b>NLM Unique ID:</b>	7501160	<b>Place of Publication:</b>	Chicago :
<b>ISSN:</b>	1538-3598 (Electronic) 0098-7484 (Print)	<b>Publication Dates:</b>	1960-
<b>Continuation Notes</b>	Continues: Journal of the American Medical Association.		
		<b>Frequency:</b>	Weekly

1 Result

page 1

LIBID	Institution Name	Format/Volumes & Years Held
MAUBPM	National Network of Libraries of Medicine, New England Region	No Holdings in DOCLINE
	<b>Status: Closed</b>	

[Add](#)

1 Result

page 1



## B. Modifying Records

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

[Update/View](#) | [Reports](#)

[Search](#) > [Titles](#) > [Update](#) [Return to Titles](#)

**Title:** chest **AND (Filters)(My Library )** [Edit This Search](#)

<b>Title:</b>	Chest	<b>Publisher:</b>	American College of Chest Physicians
<b>NLM Unique ID:</b>	0231335	<b>Place of Publication:</b>	Northbrook, IL :
<b>ISSN:</b>	1931-3543 (Electronic) 0012-3692 (Print)	<b>Publication Dates:</b>	1970-
<b>Continuation Notes</b>	Continues: Diseases of the chest.		
<b>Frequency:</b> Monthly			

National Network of Libraries of Medicine, New England Region (Shrewsbury, MA; [MAUBPM](#))

[ADD FORMAT](#)

**Format:** Text [Edit](#)

**Vols/Years:** v.1(1970)

**Completeness:** Information not available or Retention is limited

**Commitment:** No special commitment to retain title



## B. Deleting Records

Format:  Text  Electronic Journal  Microform  
 Other

Currently Received:  Yes  No

Retention Policy:  Permanently Retained:

Begin Vol.	End Vol.	Begin Year	End Year	
<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="1970"/>	<input type="text"/>	<a href="#">delete range</a>

Limited Period Only: Latest   Month  Year  Edition

Completeness:

Commitment:

# B. Applying Search Filters

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

Update/View | Reports

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**Serial Holdings** LocatorPlus

**Bibliographic Search**

Journal Title/Title Abbreviation

NLM Unique ID

ISSN

OCLC Number

**Filters**

Year(s) Owned  Volume(s) Owned  Owing LIBID(s)

My Library     
  My Routing Table     
 [Additional Filters](#)  
 No additional filters selected

My Library Groups     
  Not My Routing Table

My Region     
  My State/Province

SEARCH
Show All My Holdings
Reset Bib
Reset Filters





## B. Searching LocatorPlus



Lessons of the National Library of Medicine  
Simple Search Tutorial

Simple Search | **Advanced Menu Search** | New to the Collections

Search:

**Quick Limit Option for Keyword, Title, or Journal Title Search:**

- No Quick Limit Selected
- Reading Room Collection
- History of Medicine Collections
- History of Medicine Images
- English Language
- Currently Published Journals
- Books
- Internet Resources
- Audiovisuals and Computer Files

**As:**

- Keyword Anywhere -- (enclose phrases in quotes)
- Title -- (word or phrase: omit initial articles - e.g. - a, an, the)
- Journal Title -- (omit initial articles - e.g. - a, an, the)
- PubMed Title Abbreviation (enter exact abbreviation)
- Subject -- (includes MeSH terms)
- Author -- (enter personal names as last name, first)
- Name as Subject -- (enter personal or corporate names)
- Call Number -- (include punctuation and spaces)
- MORE KEYWORD SEARCHES BELOW-----
- Keyword Combination -- (combine terms with AND, OR, NOT)
- Keyword (automatic AND)
- Keyword (automatic OR)
- Keyword Relevance (automatic AND)

25 records displayed per page



## B. All My Holdings

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

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

**Serial Holdings** [LocatorPlus](#)

**Bibliographic Search**

Journal Title/Title Abbreviation

NLM Unique ID

ISSN

OCLC Number

**Filters**

Year(s) Owned  Volume(s) Owned  Owning LIBID(s)

**My Library**  My Routing Table [Additional Filters](#)  
 My Library Groups  Not My Routing Table No additional filters selected  
 My Region  My State/Province

[SEARCH](#) [Show All My Holdings](#) [Reset Bib](#) [Reset Filters](#)



## B. All My Holdings

[Search](#) > Library Holdings (MAUMAS)

AND (Filters)(My Library )

[Edit This Search](#)

5123 Results

page 1 2 3 4 5 6 7 8 9 10 11..20

[Previous](#) [Next](#)

Titles	ISSN	Pub Dates	Format/Volumes & Years Held
<a href="#">A. I. B. S. bulletin</a> Washington,		1951-1963	<a href="#">Microform, microfilm reel</a> : v.1(1951)-13(1963)
<a href="#">A. M. A. archives of dermatology</a> Chicago,	0096-5359 (Print)	1955-1960	<a href="#">Text</a> : v.71(1955)-81(1960)
<a href="#">A. M. A. archives of dermatology and syphilology</a> Chicago,	0096-5979 (Print)	1950-1954	<a href="#">Text</a> : v.62(1950)-70(1954)
<a href="#">A. M. A. archives of general psychiatry</a> Chicago,	0375-8532 (Print)	1959-1960	<a href="#">Text</a> : v.1(1959)-2(1960)
<a href="#">A. M. A. archives of industrial hygiene and occupational medicine</a> Chicago,		1950-1954	<a href="#">Text</a> : v.2-10
<a href="#">A. M. A. archives of neurology</a> Chicago,	0375-8540 (Print)	1959-1960	<a href="#">Text</a> : v.1(1959)-2(1960)
<a href="#">A. M. A. archives of neurology and psychiatry</a> Chicago,	0096-6886 (Print)	1950-1959	<a href="#">Text</a> : v.64(1950)-81(1959)

...gov/docline/serhold/search/shedit\_h.cfm?page=1&id=190256

Internet



## B. Generating the Serials Holdings Report

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Home
Requests
Serial Holdings
Institutions
Loansome Doc Patrons

Update/View
Reports

Create Reports

- ▾ Holdings by Library
  - [Holdings Not Updated within One Year](#)
  - [Holdings Outside of Publication Date](#)
  - [Level 2 Holdings](#)
  - [NLM Serial Title Changes](#)

Review Reports

### Holdings by Library

Choose Report Format

- HTML (to view in your browser or print)
- CSV (comma delimited; to import into Excel, Access, etc.)
- MARC 21 (to import into your library system)

Choose Report Fields

<input type="checkbox"/> Acquisition Status	<input checked="" type="checkbox"/> NLM Unique ID
<input type="checkbox"/> Commitment Level	<input type="checkbox"/> OCLC Number
<input type="checkbox"/> Completeness	<input type="checkbox"/> Physical Format
<input type="checkbox"/> Continuation Notes	<input type="checkbox"/> Place of Publication
<input checked="" type="checkbox"/> Date Added/Modified	<input type="checkbox"/> Publication Date
<input type="checkbox"/> Encoding Level	<input type="checkbox"/> Publisher
<input type="checkbox"/> Frequency	<input type="checkbox"/> Retention Policy
<input checked="" type="checkbox"/> Holdings	<input checked="" type="checkbox"/> Title
<input checked="" type="checkbox"/> ISSN	<input type="checkbox"/> Title Abbreviation

CREATE REPORT
RESET



# DOCLINE SUPPORT

- ▶ Regional DOCLINE Coordinator  
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Mark Goldstein  
508-856-5964
  
- ▶ Customer Service Desk  
National Library of Medicine  
[custserv@nlm.nih.gov](mailto:custserv@nlm.nih.gov)



# Questions & Answers

