DOCLINE®

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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**

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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**

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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.

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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:
  o *A random shuffling of cards*
  o *A random sample of the population – "statistical sampling"*
  o *Transforming a random stream of telecomm data via scrambler*

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A. Randomization

DOCLINE utilizes randomization!

- o Prior to the release of DOCLINE 2.7, the BHSL group employed a manual form of load balancing, but not the DOCLINE system !

- o DOCLINE selects "randomly" from a pool of viable lenders, in pools up to 20 libraries.

- o Don't be confused! – DOCLINE routing has always been based upon _randomization_ that matches potential lenders with borrower requests.

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A. *Free* vs. *Fee* Zones

- 9 cells make up the RT, 20 rows/cell = up to 180 cell positions

- Setting up cells optimally is essential to maximizing access to good lenders, while at the same time minimizing cost

Free		*Fee*
123	456	789

$\longleftrightarrow$

lower cells	middle cells	higher cells

- The "free" zone often extends from cell 1 to cell 6 (or beyond); lower cells are almost always dedicated to the "free" zone; cell 9 is almost always dedicated to the "fee" zone.

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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.

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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

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DEMO

on how to bring lenders into the RT Workspace

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

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Part B – SERIALS HOLDINGS 4.0

➢ **Holdings Record Components**

➢ **Adding Records**

➢ **Modifying Records**

➢ **Deleting Records**

➢ **Applying Search Filters**

➢ **Searching Locatorplus**

➢ ***NEW*"*All My Holdings*" button**

➢ **Serials Holdings Report**

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B. Holdings Record Components

Bibliographic information

Holdings information

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**

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

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*	Add
	Status: Closed		

1 Result   page 1

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Serials Holdings

B. Modifying Records

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Update/View | Reports

Search > Titles > Update   **Return to Titles**

Title: chest AND (Filters)(My Library)   ⊙ **Edit This Search**

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

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 [Select Format ▾]

Currently Received: ○ Yes ◉ No

Retention Policy: ◉ Permanently Retained:

Begin Vol.	End Vol.	Begin Year	End Year	
1		1970		delete range

Add New Range   Reset All

○ Limited Period Only: Latest [____] ○ Month ○ Year ○ Edition

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

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

DELETE FORMAT

SAVE   CANCEL

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B. Applying Search Filters

B. Searching Locatorplus
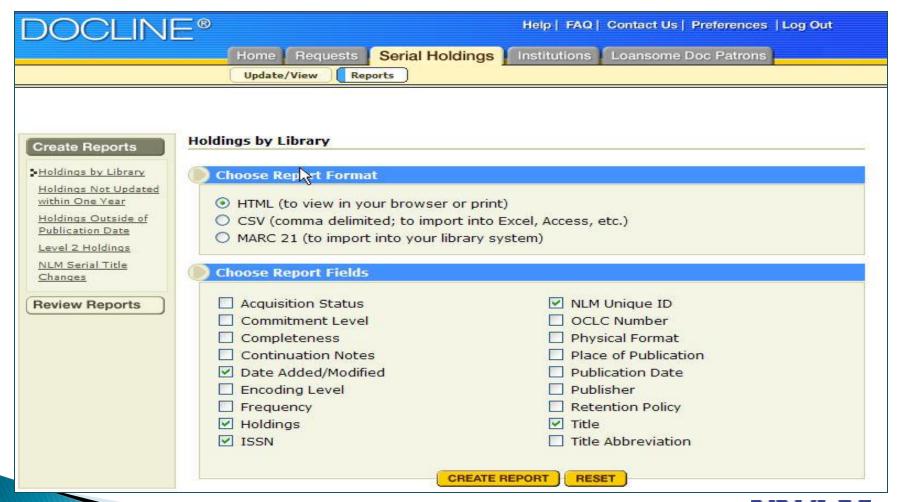
Serials Holdings

B. All My Holdings

B. All My Holdings

B. Generating the Serials Holdings Report

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Questions & Answers