

## The QDPortal Program (Ver 1.0.9 for DOCLINE 1.6)

### *Installation*

1. When you click on the link <http://nnlm.gov/quickdoc/qdpv10.exe> to the Install file, your computer will connect to the NNLM/PNR server (thanks as always to Michael Boer and Nancy Press at the RML for their valuable assistance). You'll then be offered the opportunity to either Run the file on the server or Save to a local file. If you're given this choice, choose "Save" and save the file to your Desktop (or your C:\Temp folder or any other folder you can easily find; the file can be deleted when you're finished). If Netscape, after saving the file, tries to entice you to let it start it up, say NO.
2. (If you're installing through a firewall, and get "**Authentication**" errors, the file you want contains all the modules in one file, named [QDPNoWeb.exe](#). See #3, under "Troubleshooting Installations" at the end of this document.)
3. [If this is just a revision to QDPortal---a change from 1.0.8 to 1.0.9, for example---and you've performed a proper installation already, then you can perform the upgrade by simply downloading the QDPORTAL.EXE file to overwrite your last version, which is usually located in your C:\Program Files\QDPortal folder.]
4. Once the file is saved, close down your browser and exit any other programs that might be running. If the install program is checking for files it needs to update and one of these is open, you'll have to do a reboot of the computer to continue on, so the fewer files open the better.
5. Find the Downloaded file on the Desktop (or in the Temp Directory or wherever you put it) and click on it. The **Wise Installation Program** will begin.  

[In the event that your browser saves the file to some unknown destination, you can find the downloaded file by opening up Windows Explorer -- Start Button - Programs - Windows Explorer -- clicking once on the C: Drive if it's not already highlighted; then click "Tools" at the top, and "Find File" <filename>. (The Filename will be something like qdpv11.exe.) Once you've found it, double-click on it to begin.]
6. Take the defaults as offered. Put the QDPortal Program in its own folder under "Program Files" (this should be the default anyway, unless you've already downloaded it and placed it someplace else). Make the backup folder when asked. If you ever need to uninstall QDPortal, you can do so in the Control Panel - Add/Remove Programs, and any system files updated in the installation will be returned to their older versions.
7. When the install is finished, you may be prompted to reboot, depending upon which files needed to be updated. You'll now see a new **QDPortal Shortcut on the Desktop**. Double-click this and you'll be brought to a brief setup screen: you'll need your DOCLINE Userid, password, the default DOCLINE Web Address (it's in there as the default), along with questions about Default Dates, default Routing Prefix and the format of the Patron Name entry.
8. [Because each copy of QDPortal keeps its records of activity on the C:\ Drive, you should install QDPortal on the C: Drive of any computer you'll be using with DOCLINE.]

### **Windows NT Server Installations:**

Thanks to Anne Comeaux at UTHSC San Antonio for her heads-up on NT4.0 Network Installs. Her message reads:

We also have NT 4.0. I received the [DLL in Use; Reboot Message], but, in my case, the computer did not automatically reboot as I canceled the install. I had to log in with an NT Administrative account and install the portal program in that way. I then set the NT permissions for the desktop QDPortal shortcut to allow access for the users in our ILL department, giving each of them full control. I then copied the shortcut from the desktop to the C:\winnt\profiles\all users\desktop and C:\winnt\profiles\all users\start menu folders. Now, the users I gave permission to use the QDPortal shortcut can log in as themselves and use the program. Each user has to setup the login, password, LIBID, and address once the first time they click the QDPortal shortcut.

I hope this helps. If you do not have administrator privileges for your Windows NT network you may have to get help from someone who does.

This situation occurs only when NT Security is set up to restrict the ability of individual users to access certain areas of their own machines. Only a user with Admin privileges can perform installs or access certain parts of the Registry. For Updates that do not involve these actions, such as changes to the QDPortal.exe file only, any user can perform the update. Just copy the latest version of the [QDPortal Exe Only](#) and overwrite your older version of QDPortal.Exe (usually in the C:\Program Files\QDPortal folder).

### ***Internet Explorer Version 4 and QDPortal***

DOCLINE no longer supports IE 4.x as of January 2003.

### ***Internet Explorer Version 5.0x and QDPortal***

**Internet Explorer 5.0.1** seems to work best with DOCLINE, and is your best bet if you can keep it, although this will probably be more difficult to do as support moves to 6.x and above.

### ***Internet Explorer Version 5.5 and QDPortal***

**Internet Explorer 5.5** was only supported by DOCLINE starting in early 2002. There still seem to be some minor inconsistencies in terms of recognizing certain DOCLINE pages (notably the Cancel page in Borrow) and some problems printing. These problems are usually minor and there are workarounds included in QDPortal 1.0.6 and later.

### ***Internet Explorer Version 6.x and QDPortal***

**Internet Explorer 6.0** is now supported by DOCLINE and appears to behave in much the same way as IE 5.5.

### ***Check Your Browser Settings***

Whichever version of IE you're using, be sure to make sure your settings match those required by DOCLINE for controlling Navigation to and from PubMed and Locator+, as well as preventing the posting of cached versions of pages. Check **DOCLINE's Browser setting requirements** at:

[http://www.nlm.nih.gov/docline/system\\_requirements.html](http://www.nlm.nih.gov/docline/system_requirements.html)

If you check the IE Settings **Check for newer versions Every visit to the page** then any old old page displays will not be cached and the latest version displayed each time. And don't forget to **enable Cookies** and **Active scripting**, etc., to facilitate navigation amongst the various NLM sites.

## No IE4 or IE5 Installed

This includes those with default Netscape installations (which may or may not have some old IE3 or earlier files installed). **QDPortal will only work with IE4 or later**, and the strong recommendation is for at least a Minimal copy of IE5 to be available on the computer.

## Setup Program

When you first install the QDPortal Program you'll be brought immediately to the Setup Screen. (If you ever need to change any information later, just click on the Setup button on the lower right of the QDPortal Window.)

Version 1.0.7 of QDPortal adds a Suppress Auto-close box, Suppress Password, suppress IIIADate (0 days), and suppress Patron info have been there since 1.0.6.

DOCLINE Userid: bet61

DOCLINE Password: [blacked out]

New DOCLINE LIBID: MAUBET

Default for # Days to Not Needed After Date: 0

Verify DOCLINE Addr: http://docline.gov

Default Routing Prefix: MAUBET

Send Patron [Number] Only (no names):

Suppress Auto-close on Apply in popups:

Enter Your DOCLINE Password. Not Case-Sensitive. If you leave this field blank, you will be prompted to enter your password each time you access DOCLINE.

Finished Version 1.0.7

The blue box at the bottom has brief context-sensitive help. You can press <ENTER> or <TAB> to move from question to question. Click the Finished button when data entry is completed. In general, you should have something in the first three boxes for the program to work. Questions are as follows:

Enter your **DOCLINE UserID** in the first box. It's usually something like the one above, three letters and two numbers.

Enter your **DOCLINE Password**. If you leave this blank you'll be prompted to enter it at the beginning of each DOCLINE session. In most cases, if your PC is secure, you can enter the password here, so that QDPortal can log you in automatically each time. In the event that you don't want to store the DOCLINE password on this machine, leave this field blank and you'll be presented with a **DOCLINE Password Input Box** on each Login:

DOCLINE Password (No Automatic Entry)

Enter DOCLINE Password:

OK

Cancel

Your **New DOCLINE LIBID** is usually in the format State/Prov (2 letters), Country (1 letter), SERHOLD ID (3 letters).

The **Default for # of Days to Not Needed After Date** will allow QDPortal to calculate a Default NNA date, which will then be applied to any request by clicking on the NNA Date button. (Not available for IE4.)

The **Verify DOCLINE Address** is the default. Preferred default value is now:

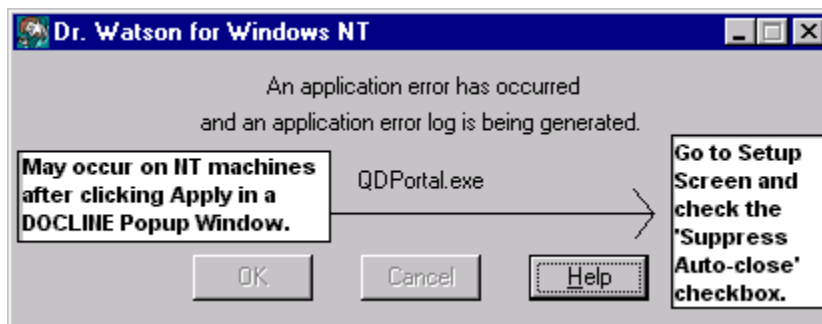
<http://docline.gov/>

You can change the string here should the value change in the future.

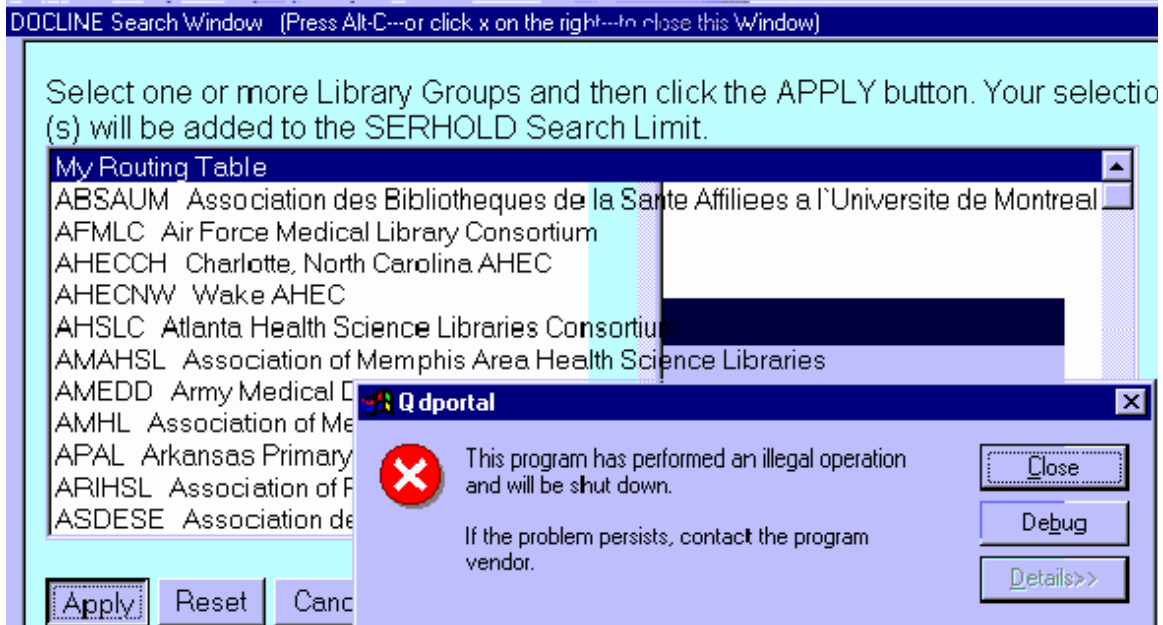
The **Default Routing Prefix** is for libraries that commonly prefix most or many of their requests to a single partner. Enter that library's LIBID here, and then click the RP Button when you want to add this default Routing Prefix. (Not available for IE4.)

Check the **Send Patron [Number] Only (no names)** checkbox if you want to preserve Patron confidentiality by sending only the Patron Number with the request on DOCLINE. The downside is that you won't see the Patron Name on the Cover Sheet when the item arrives, but it will appear when you check the item in on the QuickDOC Requests Outstanding Grid.

Check the **Suppress Auto-close on Apply in popups** checkbox if you have received an **error message** when you try to use one of the **popup windows in DOCLINE** (such as Library Groups or States/Provinces in a SERHOLD search). In **Windows NT** you see **An application error has occurred** in a **Dr. Watson** message box:



In earlier versions of Windows you may see **This program has performed an illegal operation and will be shut down**. Same effect:



In either case, check the Suppress Auto-close checkbox to forestall the automatic closing of popup windows. You'll still have to click the x at the upper right, which is a bother, but it's a bit easier than being chucked out of the program!

### ***The DOCLINE Home Page***

The QDPortal Program automatically logs you into DOCLINE each time the program starts. It brings you through the Login screen to the **DOCLINE Home Screen**:

QD Portal For DOCLINE (QD4Win)

STOP Stop Search    ? QDPortal Help    ↶ Exit QDPortal    Use DOCLINE Menu Items To Navigate Through System. And To Log Out. Check Here For Notes And File Save Activity.

**DOCLINE**<sup>®</sup> *interlibrary loan request routing and referral system*

REQUESTS    DOCUSER®    SERHOLD®    LD    HELP    HOME    Logoff-1

DOCLINE Menu

Overview  
Listserv  
Release Notes  
Barcode Fonts

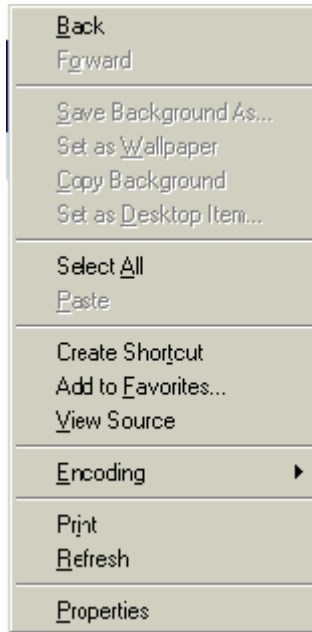
**Messages for MAUBET**  
**Beth Israel Deaconess Medical Center - East**

41	<a href="#">DOCLINE requests awaiting RECEIPT</a>
18	<a href="#">DOCLINE requests received awaiting completion</a>
15	<a href="#">Loansome Doc requests received awaiting completion</a>

This is the DOCLINE Home Page; clicking (Home) on the Menu always brings you here. DOCLINE messages appear above.

DOCLINE 1.5    Last updated: Feb 24, 2003

This is generally where you start your DOCLINE activity, and also where you'll finish up. You'll notice that there are only three buttons available at the top of the screen, unlike the half dozen or so you'll find on a typical browser. Since QDPortal is a dedicated DOCLINE Browser, you'll **use the DOCLINE Menus and buttons for all Navigation**, so there's no need for **Back** and **Forward** buttons, etc.. although you can always get to those functions, if truly necessary, by right-clicking on any white space on the page to get the **IE Context Menu**:



The **Stop Button** is provided just in case a system slowdown of some sort occurs and you just want to bail out. Click Stop and then Exit DOCLINE.

The **QDPortal Help Button** loads the QDPortal.hlp file, which should be located in your QDPortal Program folder. The QDPortal Help File is the **Windows Help** version of this document.

The **Exit QDPortal Button** exits everything, bringing you back to the Desktop. Typically, you'll first click on the Logoff-<your LIBID> link on the far right of the DOCLINE Menu, then click the **Exit QDPortal Button** to close the browser and get back to the desktop.

### ***How the QDPortal Program Saves Transaction Information***

Here's what happens in a typical Borrow situation. The process is the same whether it's a Pub Med order or a Unique Key or Manual (**only the Locator+ search presents a problem, as we'll see below**). Here's the sequence for a **Unique Key Transaction**.

1. First click **Requests**,
2. then **Borrow**,
3. then **Unique Key** on the DOCLINE Menu.
4. Enter a couple of Pub Med (or MEDLINE) UIs, separated by a space, as shown below:

When you click Search, DOCLINE goes and gets the citation data from Pub Med, and then presents you with the results. When you continue to the next screen, some of the Routing Information will already be in there (you can set much of this in defaults), but you'll probably need to enter at least **Referral Reason**, **Patron** and **Not Needed After Date (NNA Date)**.

Beginning with Version 1.0.3, you should be able to enter nearly all the information needed on the Routing page with mouse clicks. If you're using IE5 and later (and have stipulated a default number of NNA Days in Setup), you can use buttons at the bottom of the screen to enter the **Need By Date** and the **Default Routing Prefix** LIBID, if you have a specific Library to which you normally route requests on the first route. Patron information can also be added with a click on the name in the **Patrons List Box** on the upper right of the screen.

**NNA Date.** Just click on the button to insert the calculated date. If the Date isn't inserted automatically---as it may not be on certain Loansome Doc and Locator+ generated forms---right-click the button and choose **Copy**. You can then **Paste** the data in the appropriate box on DOCLINE.

**Patron Name.** Click once in the Patrons List Box, and then **type in the first few letters of the Last Name** to get to that part of the list. Use the scroll buttons or the down arrow to move to the desired Patron Name, and then **either double-click** (if your hand is on the mouse) **or press ENTER** (if you've been using the keyboard) to enter the Patron information. Because this information includes the QuickDOC **Patron Number**, matching Patrons from the request to their records in the Patrons Table of QuickDOC.MDB is much simplified. For new patrons, who don't have records in the database, just enter in the **format Last Name, First Name** and they'll be added to the list.

If the Patron name isn't inserted automatically---as it may not be on certain Loansome Doc and Locator+ generated forms---right-click the name on the Patrons List and choose **Copy**. You can then **Paste** the data in the appropriate box on DOCLINE.

If you've checked the Send Patron Number Only box, then only the [123] Patron Number will appear in the Patron field on DOCLINE.

**Default Routing Prefix.** If you want to use your default library, just click the **Def. RP Button**. If the Routing Prefix isn't inserted automatically---as it may not be on certain Loansome Doc and Locator+ generated forms---right-click the button and choose **Copy**. You can then **Paste** the data in the appropriate box on DOCLINE.



QD Portal For DOCLINE

STOP Automatic data entry for Patrons, NNA Dates and RP is available for non-Locator+ requests, as shown. Press the Initial Letter in Patron Name to Skip Down The List. Double-Click on Patron To Select

Dailey, Mark, Md [523]  
Daly, Eowyn [44]  
Daly, Jay [5]  
Danforth, David M.D. [334]

DOCLINE® interlibrary loan request routing and referral system

Logoff-MAUBET

REQUESTS DOCUSER® SERHOLD® LD HELP HOME

Borrow PubMed UniqueKey LOCATORplus Manual Transfer Requestor

**Routing Instructions** Requestor's LIBID: MAUBET

Form Copy Copyright Compliance Guidelines Maximum Cost \$  
11 . 00

Comments

Authorized By M COLETTI Referral Reason

Network Delivery Mail NLN Delivery Mail

Patron Name Daly, Eowyn [44] Need By Date (MMDDYYYY)

Phone Country Code 1 Area/City Code 617 Local  
Number 667-4225 Extension

Fax Country Code 1 Area/City Code 617 Local  
Number 667-7197 Extension

Email

Ariel

Prefix LIBID Route Cells 1  2  3  4  5  6  7  8  
 9

Def RP:MAUBET NNA Date: 08272000 Setup Screen

You can also just use the old QD Patron number, in brackets, e.g., [44]. If the import program finds this construct, it will assign the request to the Patron in QD4Win whose Patron Number matches that one. Check the **Send Patron Number Only** checkbox in QDPortal Setup to send only the Patron Number. For more information, check out the "Patron Information" section, below.

**Default comments** can be set under "Routing Profile" in your DOCUSER record. Any other values, such as Referral Reason, can be set or changed with a mouse click.

That's it. In many cases there will be no need for any typing on this form.

You'll need to drag down the scrollbar on the right of the screen above to get to the Next button, which will then bring you to the Address Screen, where you click Finish.

After DOCLINE packages the requests, the results are displayed in the **short DOCLINE Request** screen:

The screenshot shows the DOCLINE web interface. At the top, a blue banner reads "QD Portal For DOCLINE". Below this is a navigation bar with icons for "STOP", "Home", and "Exit DOCLINE". A yellow message box at the top right contains the text: "Brief Request Info Saved to File: C:\QDBorrow\3090731.txt". The main header features the DOCLINE logo and the text "interlibrary loan request routing and referral system". Below the header are several menu items: "REQUESTS", "DOCUSER", "SERHOLD", "LD", "HELP", "HOME", "Logoff-MAUBET", "Borrow", "PubMed", "UniqueKey", "LOCATORplus", "Manual", "Transfer", and "Requestor". The main content area is titled "DOCLINE Request - May 08, 2001" and contains the following text: "3090731 was routed to Beth Israel Deaconess Medical Center - East (MAUBET) as Prefixed (Not Held) for Daly, Jay MAUBET does not report holding volume 10 or year 1991 Klein P; Hewison NS; QuickDOC: an interlibrary loan department in a mic Med Ref Serv Q 1991 Summer;10(2):11-32 PMID: 10111410 ISSN: 0276-3869". At the bottom of this section are two buttons: "Full Display" and "Return".

Notice that the **yellow box at the top of the screen** gives you messages on the status of various operations. In this case, the QDPortal Program is telling you that it has saved the **Short Borrow Information** on this request in your QDBorrow folder, in a file called 3090731.txt, always named after the **first item in the package**.

The program saves the information at this level just in case you don't want to print or show the Full Display. There's enough information provided here for us to do an accurate mapping to the correct Lender, Patron, Journal Citation, and Journal Name (looked up by ISSN) during the import of transactions into QuickDOC.

The data saved in the **3090731.txt file** looks like this:

```
DOCLINE Request - May 08, 2001

3090731 was routed to MAUBET as Prefixed for Daly, Jay
Klein P; Hewison NS;
QuickDOC: an interlibrary loan department in a mic
Med Ref Serv Q 1991 Summer;10(2):11-32
PMID: 10111410 ISSN: 0276-3869
```

If you click the **Full Display Button**, though, the program will save all the information available on that screen, including additional information on Referral Reason, Max Cost, etc. Once you click the Full Display button, then that's the transaction information that the QDPortal Program saves, although the shorter 3090731.txt file is also retained as a backup in case the Full Display is corrupted. In order to facilitate a more efficient import process, the full display info is all saved to one file, named **QDPBData.txt** in the QDBorrow folder.

The box at the top of the screen notes this, as shown below:

QD Portal For DOCLINE

Full Request Info for Outgoing Requests Beginning with Number: 3090731 Saved to: C:\QDBorrow\QDPBData.txt

Right-Click This Page, Then Select Print to Print a Copy.

DOCLINE® interlibrary loan request routing and referral system

Logoff-MAUBET

REQUESTS DOCUSER® SERHOLD® LD HELP HOME

Borrow

PubMed UniqueKey LOCATORplus Manual Transfer Requestor

**\*3090731\***

Request # 3090731 BORROW COPY MAY 08, 2001

Mail To:  
Beth Israel Deaconess Medical Center - East  
Agoos Medical Library ILL  
330 Brookline Avenue  
Boston, MA 02215

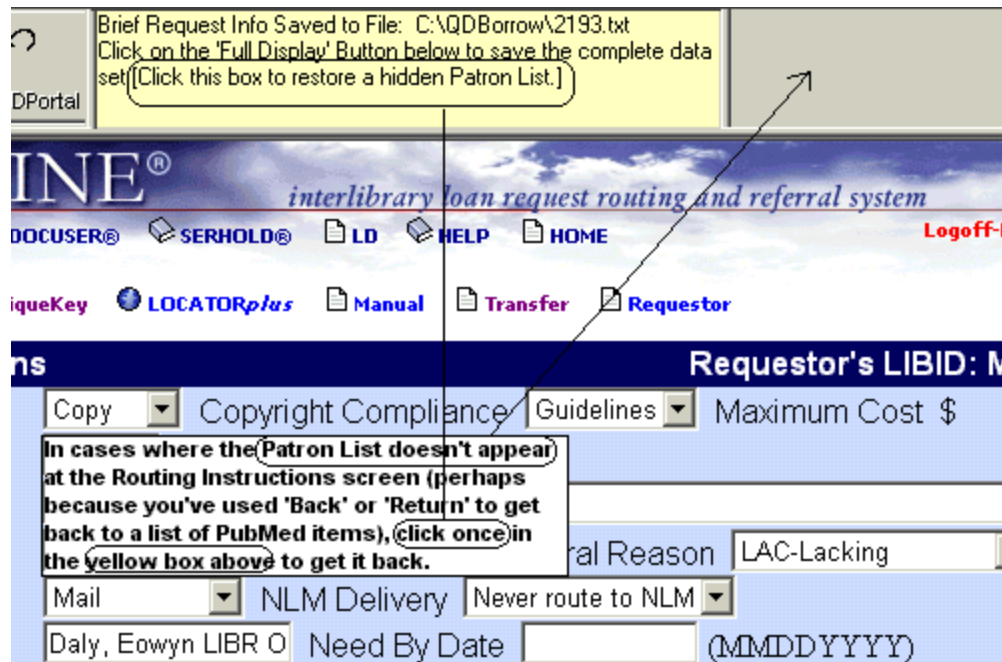
DOCLINE: Journal Copy Epayment

Title: Medical reference services quarterly.  
Title Abbrev: Med Ref Serv Q  
Citation: 1991 Summer;10(2):11-32  
Article: QuickDOC: an interlibrary loan department in a mic  
Author: Klein P; Hewison NS;

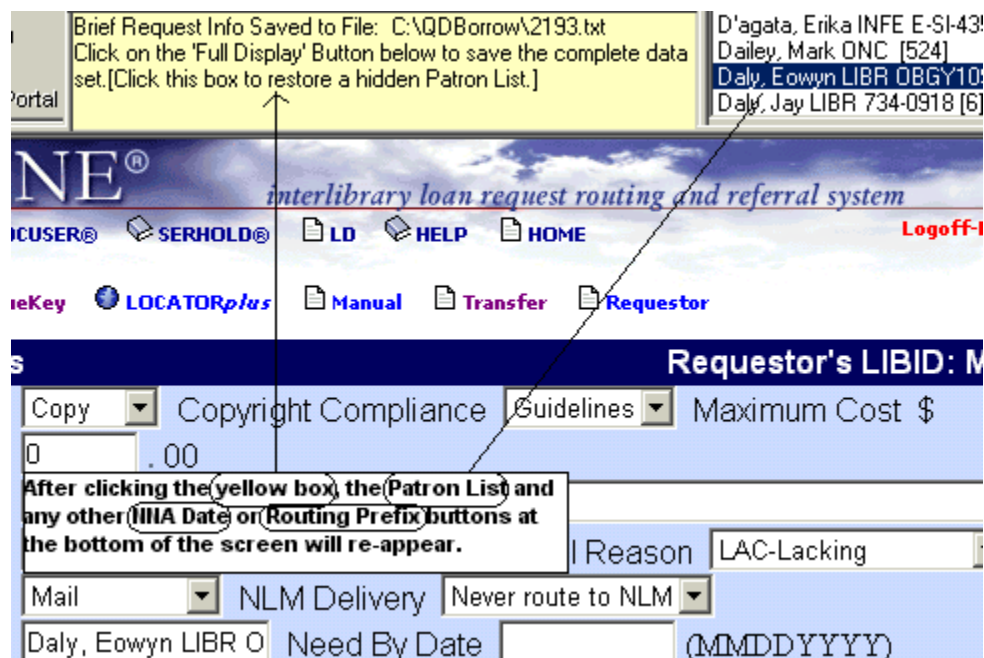
Setup Screen

### How to display a Hidden PatronsList

The **Patrons List**, as well as the various action buttons at the bottom of the QDPortal screen, should be revealed or hidden based on where you are in the course of creating Borrow Requests. In certain situations, though, such as when you initiate a **Back command** or use a **Return button** to continue with a list of PubMed citations, QDPortal may not recognize the sequence that usually causes the List and action buttons to be displayed.



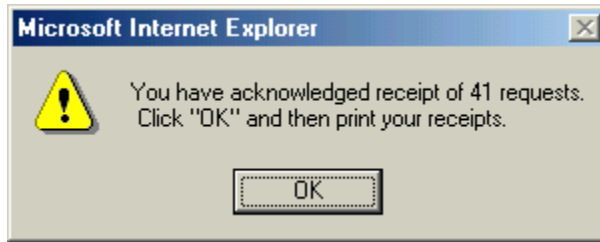
In such cases you can click once in the **yellow message box** at the top center of the screen to cause the Patrons List and action buttons to be shown again, no matter where you are in the course of creating the request:



## Printing

You can print a copy of any frame currently displayed by right-clicking inside the frame. The **print menu** will appear. Check that the middle choice **Only the selected frame** is indicated.

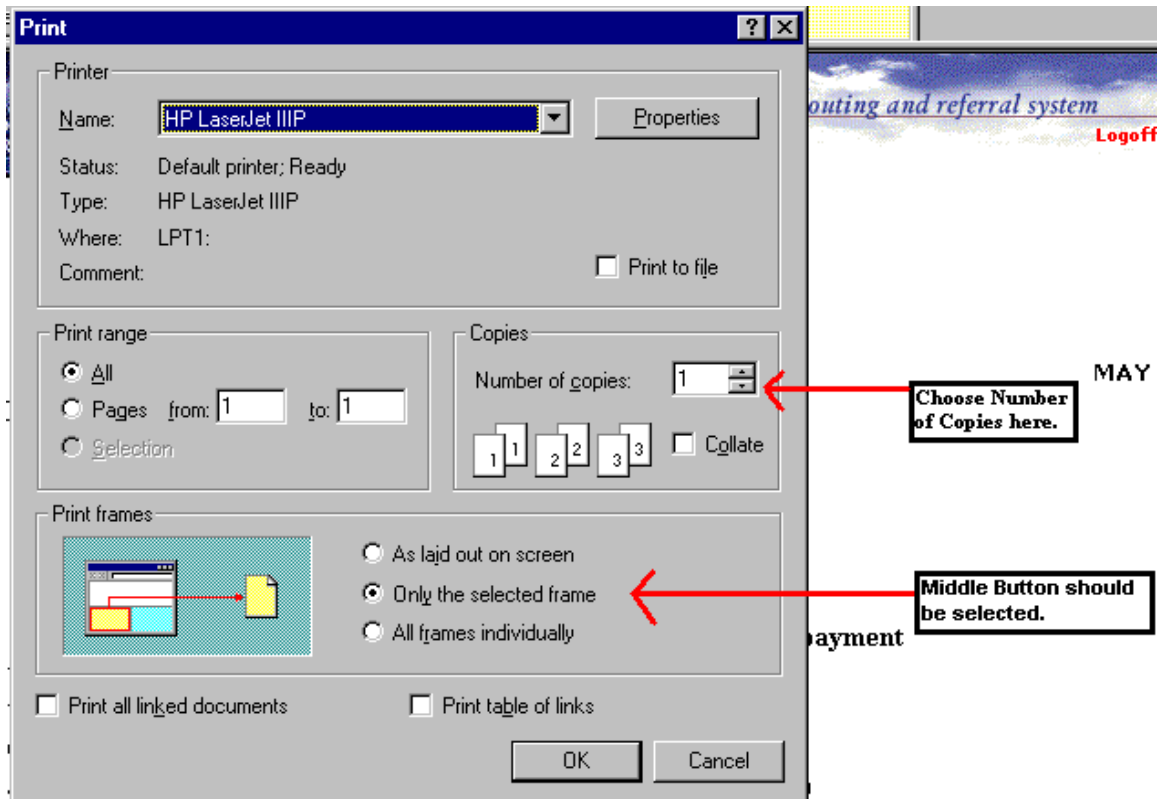
**Printing Receipts.** When the DOCLINE Receipts screen is loaded, and all request data has been transferred to QDPortal, an Acknowledge Button will appear.



Click that button to dismiss it and use the **Print Receipts button** to bring up the Print Menu.

**Dot-Matrix Printers.** Early reports seem to indicate a dissatisfaction with anything less than laser printer quality and speed. Because printouts from DOCLINE are actually graphics, if your dot-matrix printer is not a full, top of the line high-speed printer, it'll take forever to print out two or three Incoming Requests.

**Number of Printed Copies.** Note that you can set the Number of Copies on the Print Menu. If you want to keep a copy of the Receipt locally, you can set this to 2. At some point, probably when QDPortal and QuickDOC are joined in one program, we can manage printing from within QuickDOC, at which point 2-to-a-page printing, etc., will be possible.



Click the Okay button to print the request(s).

### ***Some Request Items Cannot Be Saved Automatically!***

In most cases QDPortal will save the data for each item as the DOCLINE Page that contains that data is displayed on the screen. QDPortal waits for certain pages to arrive (it looks for known URLs and then drills down to the known **Frame** within that **URL page** that contains the data we need) and when the pages arrive, it converts the text on the page into a document and saves that document to a file in **C:\QDBorrow** or **C:\QDLoan**, depending upon the nature of the page.

However, there are certain pages presented by DOCLINE that actually **originate on another server** (usually these are **Locator+** or **Loansome Doc** items, but **Manual requests** also exhibit this behavior). When QDPortal attempts to access the data on these pages, an Access Denied error is returned and the information isn't available. This occurs as a security feature of Internet Explorer, actually, which won't permit applications to have access to data located on servers other than those in the domain we're logged into.

This is never a problem with PubMed Items, or any item searched from the Unique Key form, but it is a problem with:

1. **Loansome Doc Transfer pages, and**
2. **Pages originating from Locator+.**
3. **Manual entries.**

There are also some issues that relate **ONLY to users of IE 5.5 or greater** (Borrow Cancels being one of them), but the two types above are unavailable for saving in **ANY version of IE.**



## Loansome Doc Transfers

**Loansome Doc Receipts** are captured easily enough from the DOCLINE display (these are generated on the normal DOCLINE server) so that the bibliographic information has already been captured and is in the (Borrow side) database, so the fact that we're prevented from getting it again at the point of transfer isn't very important. And LDX Requests that we're able to fill are properly recorded as filled, which means they'll be automatically processed on import.

That leaves only the **Transfers**, which can't be captured automatically (different domain), but the bibliographic information for which we will already have, for the most part, except for the Library to which it was directed on DOCLINE.

To work around that problem, a **Loansome Doc Transfer Library Input Box** will pop up when the Transfer Page loads:

The screenshot shows a web browser window titled "QD Portal For DOCLINE (QD4Win)". The main content area displays a "DOCLINE Request - May 08, 2002" with the following details:

- Result: Prefix library MAUNLF does not deliver by the requested method
- Part Author: Klein P; Hewison NS
- Part Title: QuickDOC: an interlibrary loan department in a mic
- Citation: *Med Ref Serv Q* 1991 Summer;10(2):11-32
- PMID: 10111410

A modal dialog box titled "Loansome Doc Transfer Library" is open, prompting the user to "Enter the Routed-To LIBID:". The text "MAUNLF" is entered in the input field. The dialog has "OK" and "Cancel" buttons. A callout box points to the dialog with the text: "This Input Box pops up when this page is displayed."

At the top of the page, a yellow callout box contains the message: "We can't access this page directly but we have all the data for request number 6850678 already on file. We just need the Routed-To LIBID." Another callout box points to a status box at the top right, stating: "Always check for Status of Saved or Not Saved in the box at the top center of the screen."

The bottom of the browser window shows a taskbar with several open applications: Start, Exploring - C:\Program Fi..., QDPortal.doc - Microsoft..., QD Portal For DOCL..., LDXSaved.bmp - Paint, and a system tray showing the time as 10:52 PM.

Just type in the Library LIBID and this information will be updated in the item record back in QuickDOC, changing the **Status from Queue to Outstanding**, with the **potential lender** to MAUNLF in the case above (which case, by the way, wouldn't be successful, because the MAUNLF library isn't registered on DOCLINE for this Delivery Method).

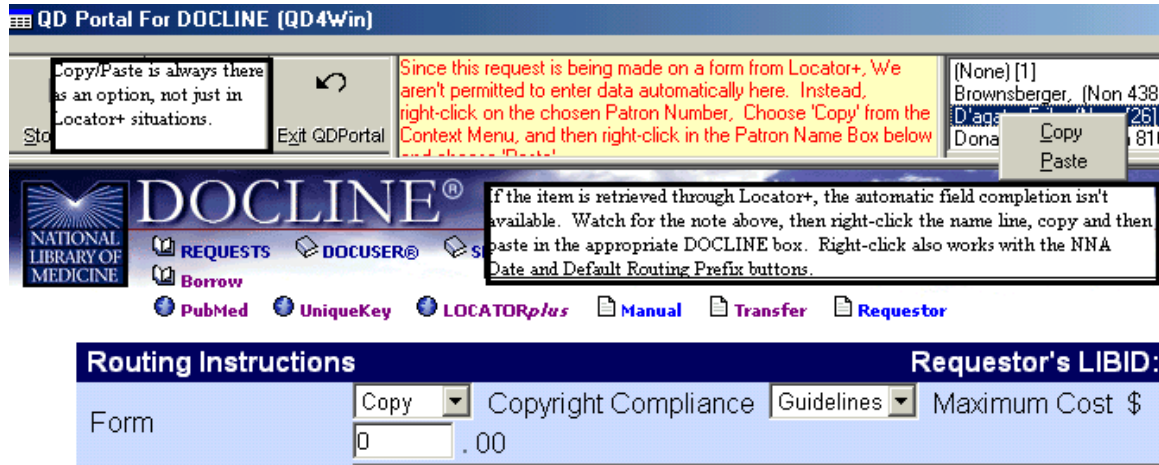
## Requests Generated through Locator+

If you use the **DOCLINE Order button in Locator+** to generate the request, whether for a **Monograph** or by using the **NLMUI of a Journal**, it won't be possible to save the data automatically. When we try, we get an Access Denied error on DOCLINE.

But if by mistake you do use Locator+ to create the request, you'll notice that you won't have access to some of the usual shortcuts while creating the Routing information. The automatic

entry of Patron, NNA Date and Routing Prefix information isn't permitted (as you'll notice when you try clicking the buttons or double-clicking on a Patron on the Patrons List).

If you find yourself in this situation, you can recover by using a **Copy/Paste Workaround** that uses the right mouse button to accomplish what you normally accomplish by clicking the left mouse button. Here's the **context menu** you will see when using right-click on the Patrons List:



Right-clicking on the **NNA Date** or **Routing Prefix** button works in the same way.

Once the form is completed and the Finish button is clicked, a Locator+ request must still be handled differently. The **short display** can't be saved automatically, but you will notice that a new **Save Locator+ Button** now appears at the bottom of the screen.

If you click the Save Locator+ Button while the Short Display is on the screen it will be saved in the short format:



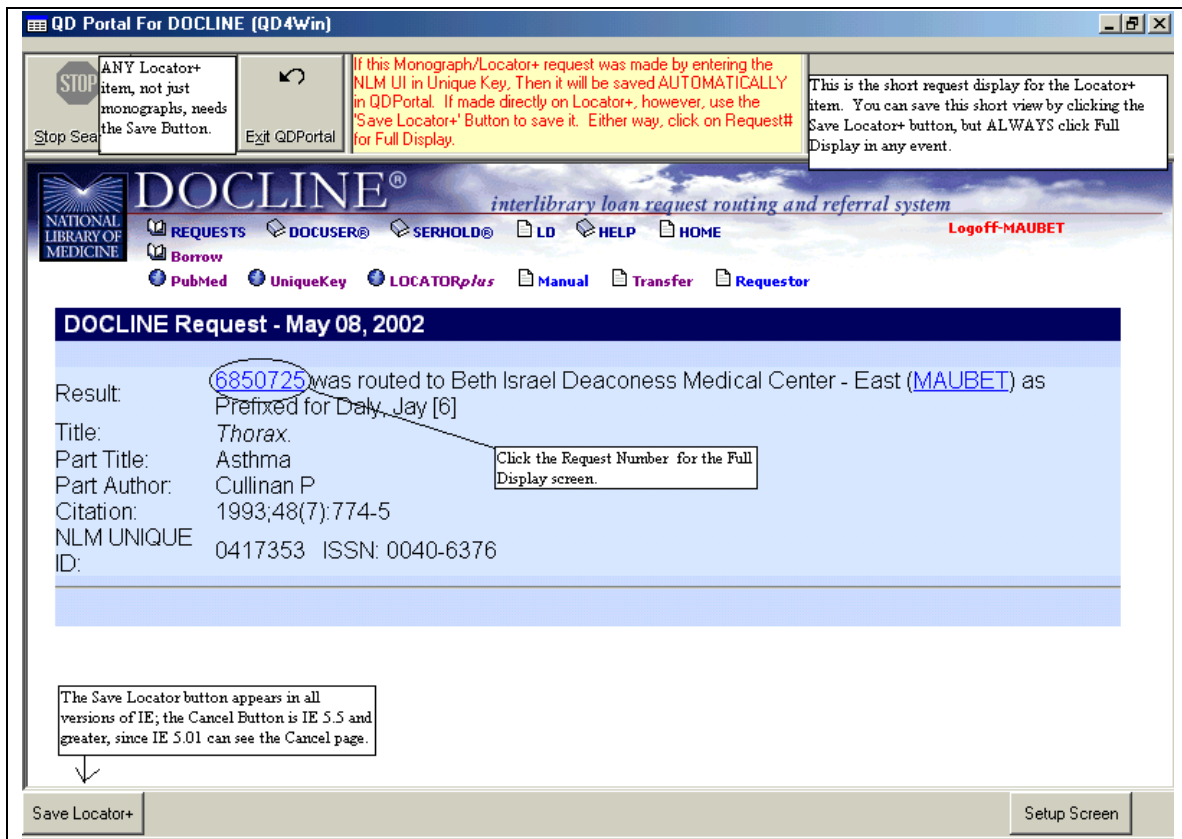
but it will be wise to continue on with the Full Display in any event.

**GOOD RULE OF THUMB:**

**ALWAYS SHOW THE FULL DISPLAY, USING EITHER THE FULL DISPLAY BUTTON OR THE HYPERLINKED REQUEST NUMBER, IN ANY BORROW TRANSACTION!**

Whether or not you save the Short Display, click the Request Number hyperlink to see the **Full Display**:



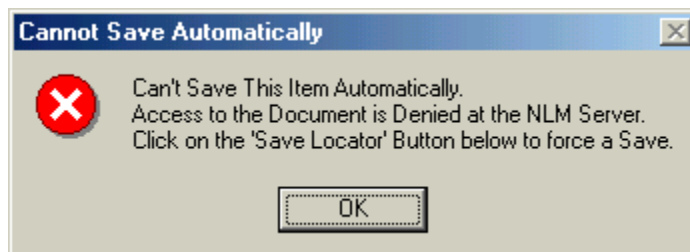


To repeat: It's a good idea to **ALWAYS CLICK FOR FULL DISPLAY IN ALL CASES for Borrows, either by clicking a Full Display Button or, as in this case, clicking the Request Number.**

After clicking the Request Number, the full request will be displayed. If it was created by copying the NLMUI from Locator+ and pasting into the Unique Identifier screen (explained below) then you will see a notice that it has been saved automatically. If it's a Locator+ generated item, you'll see the **Access Denied Message Box.**

### **"Access Denied" Error Trying To Save Data**

The "Access Denied" problem keeps us from recording the information. When the Full Display screen appears, if you see this immediate Message Box:



you can be sure that this request is one of those generated by the foreign domain. Use the Save Locator+ button again to save the full display data. After you click this button, you should see notice that the item has been saved:

Perhaps a better method for dealing with Locator+ requests is to **sever the Locator+ connection at the very beginning of the Request Creation**. This is accomplished by simply **copying and pasting the NLMUI from Locator+ to the UI box in the Unique Key Request form** on DOCLINE and ignoring the **DOCLINE Order button** on the Locator+ screen entirely.

### ***How To Use Copy/Paste to save Locator+ Items in QDPortal***

Use the **Locator+ choice** on the DOCLINE Borrow, Requests Menu, as usual, to look up the item in the Locator+ database. Once you've found the item, drill down to the Details and, instead of clicking "DOCLINE Order," **select the NLM UI** (left-click and drag the mouse over the UI until it's highlighted, as illustrated below).

**DOCLINE**<sup>®</sup> *interlibrary loan request routing and referral system*

REQUESTS DOCUSER<sup>®</sup> SERHOLD<sup>®</sup> LD HELP HOME **Logoff**

Borrow

PubMed UniqueKey LOCATORplus Manual Transfer Requestor

*Memory and amnesia : an introduction / Alan J. Parkin.*

Availability: ■■■■■

Author(s): [Parkin, Alan J.](#)

Title: Memory and *amnesia* : an introduction / Alan J. Parkin.

Edition: 2nd ed.

Publisher: Oxford, UK, Malden, Mass. : Blackwell, 1997.

ISBN: 0631197028 (pbk. : alk. paper)

Unique ID: 9708239

Location: G

Number: 1

Status: Available

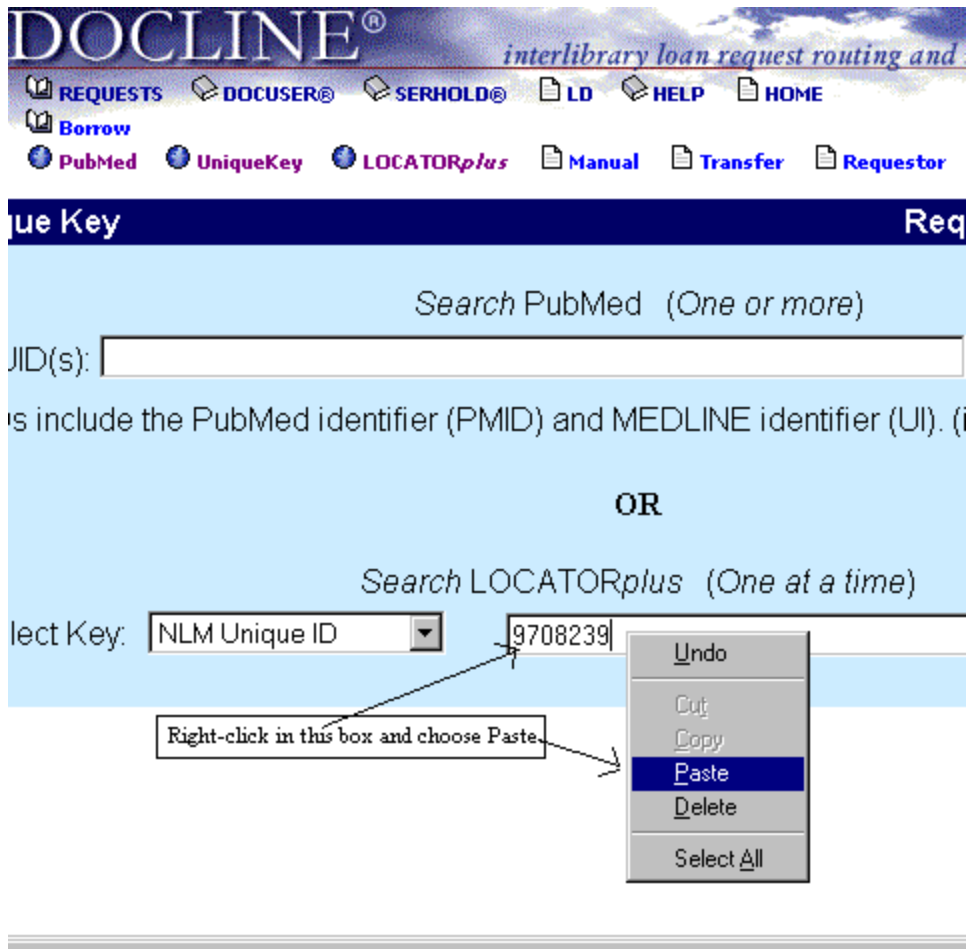
1. First select the NLM Unique ID by depressing the left mouse button and dragging it from beginning to end.

2. Then, right-click in that blue area and select Copy from the Context Menu that will appear at that point.

3. Ignore the DOCLINE Order Button below; instead click back to the UniqueKey form on DOCLINE, above.

**DOCLINE** <sup>®</sup> Order

After selecting the item, right-click that area and choose **Copy**, which will put the UI Number on the Clipboard. Next, click on the **UniqueKey DOCLINE choice**, which is at the top of the screen (not the "DOCLINE Order" at the bottom). This will exit Locator+ and bring us back to the Unique Key entry form in DOCLINE. Right-click inside the Search box on the lower right, choose **Paste**, and the UI from Locator+ now appears in the search box.



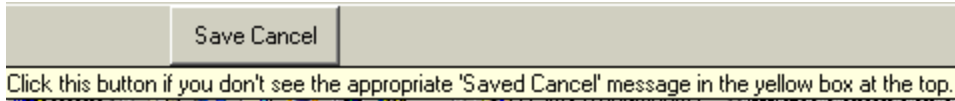
Click the "Search" Button and proceed as usual. You'll get the same Locator+ bibliographic information as before but, since there's **no live link between DOCLINE and Locator+**, the Access Denied error doesn't occur, and the request is saved just as any other Unique Key request.

### **Automatic Save of Borrow Cancels Doesn't Work in IE 5.5 or Greater**

**Borrow Items Cancelled on DOCLINE** are normally saved automatically (the filename is **Cancel.txt**), so that they can automatically update the associated item in the BorrowItems Table of QuickDOC.MDB to **Not Filled** with the Reason **Cancelled**. This works as expected in IE 5.01 but never happens in IE 5.5 or greater.

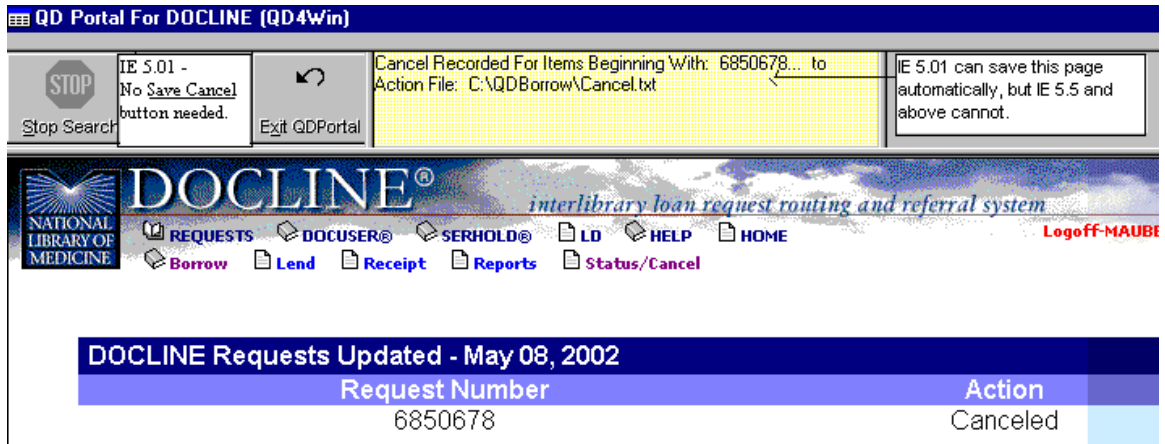
IE 5.5 must have made some change in how it orders frames or notifies an application that a page has been completed, because in IE 5.5, while it recognizes the Cancel URL and frame, it doesn't notify QDPortal that the page has been retrieved until after focus has moved off it back to the Status/Cancel page. So when QDPortal tries to save the information from the Cancel screen it finds that it isn't the current page; the Status/Cancel page is there, instead. And there is no frame on the Status/Cancel page that corresponds to what we expect to find in the Cancel main frame, so nothing is saved.

**To work around this problem in IE5.5 and greater**, QDPortal adds a new **Save Cancel Button** (only users with IE 5.5 and later will see this; if you're using IE 5.01 you can proceed as usual and Cancels will be saved automatically).

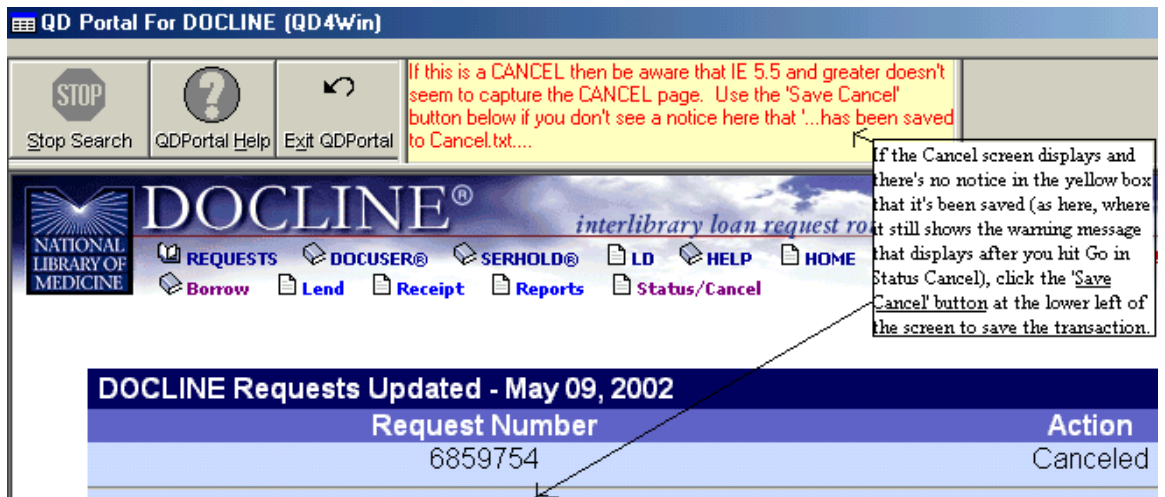


This button will appear at the bottom of your screen if you're using IE 5.5 or greater and you venture into the **DOCLINE Status/Cancel area** and click the **Go Button**. (Since we don't know that the Cancel page is displayed until it has already passed and gone, we need to display the Save Cancel Button whenever we pass through Status/Cancel, so it will be there if needed for a Cancel display.

After clicking Cancel on a selected item, the Cancel Page (DOCLINE Requests Updated) is displayed. In IE 5.01, the note that the Cancel information has been saved appears automatically in the yellow box at the top of the screen at the same time as the display:



If you're using IE 5.5 or greater, however, you'll see **no Saved message in the yellow box** after the Cancel Page is displayed.



You have to **click the Save Cancel Button** to force the save. After clicking that command button you should be advised that the operation has been successful, again in the yellow box at the top.

DOCLINE Requests Updated - May 09, 2002		
Request Number		Action
6850725		Canceled

Either click Home to begin another transaction, or click Return if you want to go back to the Status/Cancel screen.

### ***Retrieving Items that were not Saved the first time***

In nearly all cases, requests, both Borrow and Receipt, are saved automatically in their proper import files, either as a part of normal operation or as a result of a Save Locator+ or Save Cancel button click. **Receipts** are always saved in **C:\QDLoan\QDPLData.txt**, where they sit until the Import QDPortal button is clicked in QuickDOC and they are imported into the database. **Short Display Borrows** are saved in **C:\QDBorrow\12345678.txt**, where 12345678 equals the first request number in that batch. **Full Display Borrows** are saved in a single file, new ones added at the end, in the same way as Receipts are saved, with filename **C:\QDBorrow\QDPBData.txt**. **Loansome Doc Receipts** are also saved in a single file, new ones added at the end, in the same way as Full Display Borrows are saved (don't forget that **Loansome Doc Receipts are Borrows**), with filename **C:\QDBorrow\QDPLDX.txt**.

If you notice that an item you ordered or received during the latest QDPortal session isn't added to the database (and, for Borrows, unless you check after every import you may not notice this until the item arrives and you try to check it in), you can retrieve the item again from DOCLINE by using the **Status/Cancel function**. (The request must be recent, though, to use this, within the last four weeks or so.)

Go to Status/Cancel and either

1. Type in the **Request Number you're looking for** in the box at the left and click **GO**, or
2. Choose either DOCLINE or LD. Borrow, Lend or Transfer, and the number of days to look back (the Begin day equals today; the End days equal the number of days you want to go back) and click **GO** to get a **list of items**.

Once you get the list of items, or the single item you want, click on the Request Number to display:



You'll note that this item has been saved to the proper import file and will be imported into the database when next the Import QDPortal button is clicked in QuickDOC. Don't worry about getting duplicates in this manner as any dups are weeded out at the time of import. If in doubt, grab it.

In QDPortal 1.0.5 and earlier there were situations (mostly in IE 5.5, again) where Borrow Items were being imported into the Lend side. This occurred only when typing in the Request Number, not when choosing from the list, and this was caused because DOCLINE uses the Receipt Page to display items retrieved by Request Number, whether they are Borrows or Lends.

QDPortal 1.0.6 and later make a further check when being presented with a Receipt Page after arriving there through the Status/Cancel page: before the item is saved, the first request is parsed down to the Routing Reason line. If the Library named in the Routing Reason line has the same LIBID as the Library running the program, then it's saved as a Borrow, even though displayed on the Receipts page. If the LIBID is different from your own LIBID, then it proceeds as a Receipt re-captured.

### **Updating Borrows in QD Portal?**

Action on LEND Updates are saved automatically. Borrows in general aren't completed until the item is received and checked in on the Requests Outstanding Grid in QuickDOC.

### **Full Display is always the best choice for DOCLINE Borrows**

As has been mentioned often, while QuickDOC will save as much information as it can when the short version of the DOCLINE Request is displayed, it is ALWAYS better to display the full request as well. There is information on the full display that simply isn't available on the short display.

As a further incentive, there are occasions when the **Short DOCLINE Request Display** may be formatted in such a way that none of the items can be saved. In particular, this happens when you have a group of requests entered for one patron and you have limited the number of cells to route through, or have otherwise restricted the full routing of the request. In the event that one or more of this group of requests finds no matches in the restricted routing, the Short Display may prevent ANY of the items from being saved from the group displayed.

Here's an example where two of the three requests were for journals with no holding libraries in the first four cells:

TOP	?	↶	Press the Initial Letter in Patron Name to Skip Down The List. Double-Click on Patron To Select	No 'Saved As ...' message appears here!
Search	QDPortal Help	Exit QDPortal		

**DOCLINE®** interlibrary loan request routing and referral system

[REQUESTS](#)
[DOCUSER®](#)
[SERHOLD®](#)
[LD](#)
[HELP](#)
[HOME](#)
Logoff

[Borrow](#)

[PubMed](#)
[UniqueKey](#)
[LOCATORplus](#)
[Manual](#)
[Transfer](#)
[Requestor](#)

**DOCLINE Request - Jun 20, 2003**

<p>No libraries match your routing instructions.</p> <p>Baylor SM; Hollingworth S; SARCOPLASMIC RETICULUM CALCIUM RELEASE COMPARED IN <i>J Physiol</i> 2003 Jun 17; PMID: 12813151 ISSN: 0022-3751 (Print) 1469-7793 (Electronic)</p> <p>No libraries match your routing instructions.</p> <p>Herrera GM; Pozo MJ; Zvara P; Petkov GV; Bond CT; Adelman JP Urinary bladder instability induced by selective s <i>J Physiol</i> 2003 Jun 17; PMID: 12813145 ISSN: 0022-3751 (Print) 1469-7793 (Electronic)</p> <p><b>3547</b> was routed to Dana-Farber Cancer Institute (<a href="#">MAUZSL</a>) in cell 2 for Daly, Jay LIBR 734-0918 [6]</p> <p>Sun Y; Qi X; Grabowski GREGORY A; Saposin C is required for normal resistance of aci</p>	<p>Because the first of this group of requests has not been routed, none of the following short requests can be saved. ALWAYS DISPLAY FULL REQUESTS.</p>
	<p>Use the <b>Full Display button</b> below, or click the <b>Request Number</b> for each request, or none of the short requests on this page will be saved!</p>

When parsing the page, QDPortal expects to find a Request Number at the top. Because it is missing, no attempt will be made to save whatever data is on this page. Since request number 3547 is buried behind two unsuccessful requests, it will **never** be saved in the short display format.

Either click the Request Number itself or the **Full Display Button** (out of sight at the bottom of the page displayed above) to get the Full Display Page, where the box at the top will tell you that the Full Request has been saved to file **C:\QDBorrow\QDPBData.txt**. As a reminder, beginning with QDPortal version 1.0.9, the box at the top will change to the following when the first request begins with **"No libraries match your routing instructions..."**:

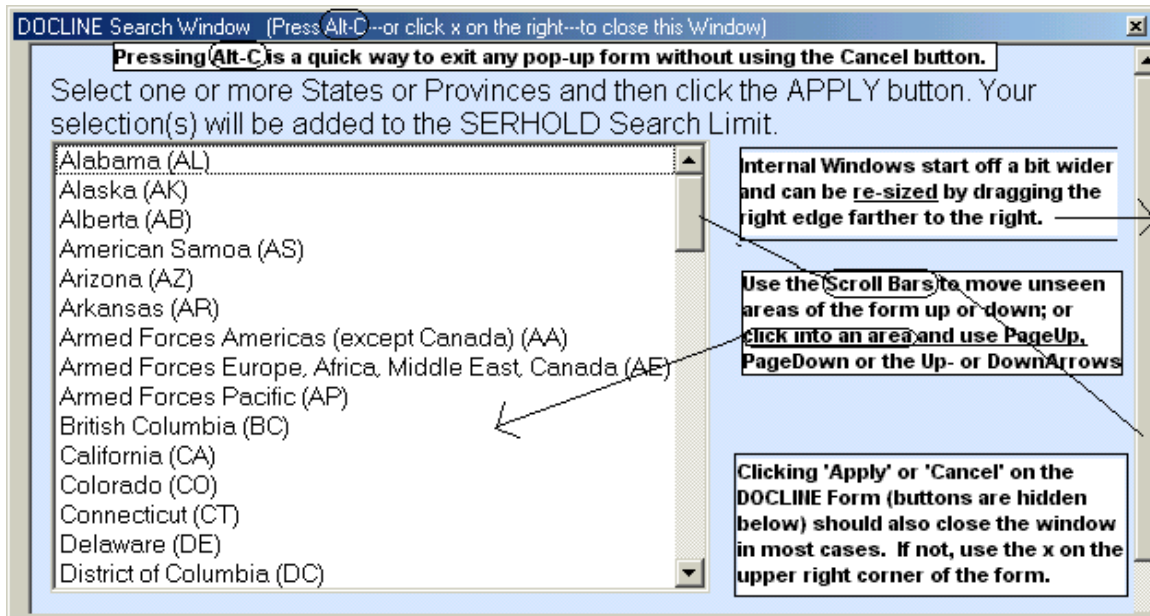
No save here. BE SURE ALWAYS TO DISPLAY THE FULL REQUEST BY CLICKING REQUEST NUMBERS OR FULL DISPLAY BUTTON!

**Popup Windows in QDPortal**

Popup windows, such as those that display the list of states/provinces in the SERHOLD search, have always been a special challenge in QDPortal. When the browser gets the notification to open the window, it wants to respond by opening a new instance of Internet Explorer. Since this might lead us who-knows-where, QDPortal intercepts this message and opens its own window instead. Not having any idea which window this might be, it just chooses a general size and hopes it will work.

Version 1.0.9 has enlarged this initial size a bit, and added an **Alt-C hot key** to close the window from within. The new popup window will appear as follows:





Alt-C only works when the focus is within the form, so you may have to click once into the white area before pressing the Alt-C combination, and it won't work, of course, after a DOCLINE Cancel button has been used, so there will continue to be, alas, many cases where you'll need to use the x at the upper right to close the window.

Unlike earlier versions of QDPortal, beginning with Version 1.0.7, when you click the **Apply button**, the popup window should close on its own (without your clicking the x at the upper right of the now-blank popup).

### **If an error occurs after clicking the Apply button...**

In most cases this new method will work just fine; the popup window will disappear after you click Apply, as it should. In cases where the processor on the computer is faster than QDPortal's ability to grab the fact that the Apply button has been clicked and to close the window on its own, however, you may get an Exception message that kicks you all the way out of QDPortal. On Windows9x machines it may appear as a **This program has performed an illegal operation** error, or in Windows NT the message may appear in a **Dr. Watson** window as **An application error has occurred** with the result that the QDPortal program is closed out.

In either case, the workaround is the same: Use the **Suppress Auto-close on Apply in popups** checkbox on the **Setup Screen** to go back to the earlier manual method. See the discussion under Setup Program at the beginning of this document.

### **Popup Window displaying PubMed Central item is now full-screen**

In most cases the regular popup window size will be satisfactory, but the one situation where it will inevitably be undersized is when the full text screen in **PubMed Central** is displayed. There are two ways to reach the screen in PubMed Central that contains full text of the article requested (either HTML or PDF in most cases). One is at the **Process PubMed Orders** screen in DOCLINE, which appears after you click **Order** and **Send To** in PubMed, or if you simply enter the PubMed UI in the Unique Key form on DOCLINE:

STOP QDPortal Help Exit QDPortal Enter Necessary Bib or Routing Information Below. Click Once Anywhere On the Patron List Here ----> Then Type In the Few Letters in Patron Name to Skip Down The List. Double-Click on Patron To Select

**DOCLINE®** interlibrary loan request routing and

REQUESTS DOCUSER® SERHOLD® LD HELP HOME  
 Borrow  
 PubMed UniqueKey LOCATORplus Manual Transfer Requestor

**Process PubMed Orders** Rec

Fikar CR; Corral OL  
 Non-librarian health professionals becoming librarians and information professionals: an Internet survey.  
*Bull Med Libr Assoc.* 2001 Jan;89(1):59-67  
 PMID: 11209802 ISSN: 0025-7338 (Print)  
 \*\*\* [Free in PubMed Central](#) \*\*\*

Articles that are (freely available) are noted; but it's better to get this at the PM screen.

Clicking the link above will bring you directly to the **free full-text** page in PubMed Central.

In most cases, though, you will be searching in PubMed when you get notice that the item you want to order is **free in PubMed Central**:

**DOCLINE®** interlibrary loan request routing and

REQUESTS DOCUSER® SERHOLD® LD HELP HOME  
 Borrow  
 PubMed UniqueKey LOCATORplus Manual Transfer Requestor

NCBI PubMed National Library of Medicine

PubMed Nucleotide Protein Genome Structure PMC

Search PubMed for 11209802 Go

Limits Preview/Index History Clipboard

The **Free in PubMed Central** symbol will appear in PubMed

Display Summary Show: 20 Sort Ser

1. [Fikar CR, Corral OL.](#) [Free in PMC](#)

Non-librarian health professionals becoming librarians and information professionals: an Internet survey.  
*Bull Med Libr Assoc.* 2001 Jan;89(1):59-67.  
 PMID: 11209802 [PubMed - indexed for MEDLINE]

Clicking the "Free in PMC" icon will bring you to the Abstract page:

Clicking the red square will bring you to the full-text entry, which QDPortal will show full-screen, in a new window:

Click the x at the upper right (not shown above) to close the Window when you're finished. You can right-click in any empty spot on the window to get a **Context Menu**, with **Back**, **Forward**, **Print**, etc. **PDFs** will also appear full-screen in this window, but the Context Menu in **Adobe Acrobat** will be different, so you'll have to close the window and re-click the red square on the Abstract Page to get back to the view above.

## Frequently Asked Questions

[Thanks to Greg Perciak, who gathered together some of these topics from QuickDOC-L posts.]

## Backing up in QDPortal

*Is there a provision for backup or should I just save the QDLoan and QDBorrow folders to a floppy when I'm done for the day, which is probably what I will be doing unless there is another more automated way.*

The most important backup, which should be done daily, is your QuickDOC.MDB database. You can also backup, periodically, both the C:\QDBorrow and C:\QDLoan folders on each machine using QDPortal, including their BackImp subfolders, to provide a secondary level of backup. These folders contain the raw data downloads from DOCLINE. They have all been imported into the database, but keeping the raw ASCII text data around somewhere will allow for a re-import in the unlikely case that the database and all its backups have been lost. It can be backed up to a server, overwriting any previous versions of the files it contains.

## Why Can't I Transfer Patrons from the Patrons List to DOCLINE?

*When doing a DOCLINE session I cannot get the patron list to interact. My list is showing at the top. It also is accessible in QuickDOC. When I double-click the list in QDPortal, nothing happens. The info is not moved to the Patron name field in the request. Also, the default NNA date button also does not work. When I click on the button it disappears and no date is moved to the Need by field.*

If you are using the latest version of QDPortal, then we're probably dealing with a DOCLINE request that was originated through Locator+ (not just books, any item where you begin with a SERLINE UI may also originate on the Locator+ server). The reason why many of the automated data 'SUBMITs' don't work on these requests is that IE identifies the location of these forms as a server different from the one we logged in on (it looks like DOCLINE but the Browser thinks it knows better) and consequently won't permit certain actions. Automatic posting of Patron and **NNA Date** is one example, but a worse example is that it won't allow QDPortal to automatically parse and save a text version of the final Borrow display field. This means we have nothing to import after you've sent the request.

So, in some ways, the problem with automatically importing the Patron is a good thing: if you can't, then you KNOW you won't be getting the rest of the item automatically, either. It's an early reminder that you will have to make other plans.

Once you discover that you're in a **Locator+ Request**, you can right-click the Patron List and the NNA Date Button, and choose **Copy and Paste** to move your data to the DOCLINE/Locator+ Form, but you will still be required to use the **Save Locator+ button** to save the data at the end of the request, since it can't be saved automatically.

It's always best to use the **Copy and Paste NLMUI Method** when using Locator+ (NEVER just click the 'DOCLINE Order' button), but if you forget to Copy and Paste and just click DOCLINE Order, you can still recover with a **manual save**. And if you forget to save manually, you can recover even after that by simply displaying the full item in **DOCLINE Status/Cancel**. This will cause QDPortal to save it once again, and this time it'll work, since the page to be saved is on the DOCLINE server, not the Locator+ server. See **Some Request Items Cannot Be Saved Automatically!** above.

## Troubleshooting Printing.

*When I print out received requests in QDPortal, I get an initial page that is pretty much a **blank page** except for the gray buttonbar that says "Acknowledge receiving requests (after printing)". This seems unnecessary and wasteful. Is anyone else having this problem? All requests print out fine.*

When the print menu pops up, is the correct default choice "Print Current Frame Only," the middle choice, the one selected?

If not then that explains why you're getting both frames printed (the Acknowledge button is the other frame). Keep an eye on that Print Menu. If you don't get the middle choice as default, cancel the print job, right-click on the middle of the frame you want (the request), and select Print again. You should get the correct frame.

*I want to see if there's a way to turn off the printing of **headers and footers**. (If you go through Netscape directly, you can use File, Page Setup.) I have IE 5.5.*

I think it's the same: File --> Page Setup --> then clear the Headers & Footers boxes.

*What are some of the problems users experience **printing in IE 5.5** and above?*

DOCLINE just began supporting IE 5.5 in early 2002. Even so, there is still a Note on the DOCLINE System Requirements page about IE 5.5 quirks:

**NOTE:** Some users may experience difficulties with DOCLINE if they upgrade to IE 5.5; however, this is a documented problem with the Microsoft Internet Explorer upgrade itself. If problems arise, it is recommended that users reinstall IE 5.5.

*Why do I seem to get **Printer could not be found** errors in IE 5.5 and above?*

There is an article in the Microsoft Knowledge Base **Error Message When You Print from Internet Explorer: Printing Error: The Printer Cannot Be Found (Q303360)** that discusses this problem (URL as of 5/9/2002 was:

<http://support.microsoft.com/default.aspx?scid=kb;en-us;Q303360>

Their speculation as to cause was:

---

**This behavior can occur if any of the following conditions are true:**

- **The printer driver is damaged.**
- or-
- **The Iepeers.dll file is damaged or is the incorrect version.**
- or-
- **The spool settings for the printer are incorrect.**

---

Ignoring the middle suggestion, which is more complicated to fix, reinstalling the printer driver seems like a good first step.

If that doesn't work, try their third choice, which involves setting the Spool Settings on that computer:

---

Specify different spool settings for the printer. To do this, follow these steps:

1. Click **Start** , point to **Settings** , and then click **Printers** .
2. Right-click the printer, and then click **Properties** .

3. On the **Details** tab, click **Spool Settings** .
4. Click **Start print job so program finishes printing faster** , click **Start printing after last page is spooled** , and then click **OK** .
5. Restart your computer.
6. Start Internet Explorer, and then attempt to print a Web page.
7. If this does not resolve the issue, repeat steps 1 through step 3, click **Print directly to the printer** , and then click **OK** .
8. Restart your computer.

## MORE INFORMATION

For additional information about troubleshooting the "Cannot Print from Internet Explorer" error message, click the article number below to view the article in the Microsoft Knowledge Base:

[Q293176](#) Cannot Print from Internet Explorer

For additional information about troubleshooting printing issues in Windows Me, click the article number below to view the article in the Microsoft Knowledge Base:

[Q128345](#) Troubleshooting Printing Problems in Windows 95/98/Millennium Edition

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## ***Troubleshooting Installations.***

### 1. Scroll Bars Can't Be Seen.

Claudia Ciampini, Montreal General Hospital, notes:

I was able to solve this problem by changing my font size in Windows from large fonts to small fonts. Go to Display Properties - Settings - Display Area (Screen): mine is set at 800 x 600 - Font Size: here your choice is small or large fonts. I had large fonts selected because I'm more comfortable with the larger print on my Desktop and in other programmes, but unfortunately this setting affects the DOCLINE screen when you go through the QD Portal.

### 2. Error 429: Active X Component Can't Create Object

This error may occur if you haven't performed the install on the machine running QDPortal, in the case where the QDPortal.exe file was installed on a server or on a different computer, but the machine now trying to run it has never gone through the installation program. Files necessary to running the program are therefore not installed on this particular machine. The solution is to run the install on this machine. Since the QDPortal Program isn't very large, it probably doesn't make sense to install it on a server, anyway. Just run the install from each



machine on which it will be used. To save time, it might make sense to download the complete QDPNoWeb.exe version to a server, and then run the workstation installations from there.

### 3. Authenticity Errors During Web Installs

If you get errors while performing the web install that mention "Authentication..." it's probably related to the downloading of individual components during the install: your firewall may not approve. While the web install method is HIGHLY recommended---it only downloads files you actually need, not the entire program---if your firewall won't permit it, then you can't use it. If you need to download the entire program (to your temp directory), the URL is

<http://nlnm.gov/quickdoc/QDPNoWeb.exe>

Download this behemoth (it weighs in at 4.5MB, as opposed to the 135K of the qdpv10.exe) to your temp directory; execute it; and the installation will look pretty much the same at your end as the web install.

### 4. VA Gateways

Question: We figured out the problem here at the VA Healthcare System. Apparently they put security on our gateway. When we try to run the program it doesn't pause long enough for us to input the codes.

Answer (multiple choice): If you're running IE5, and you end up at the DOCLINE Home page, then that's what it's supposed to do. It's logging you in automatically. If you're running IE4, and you get the error message screen, just right click the screen, choose "Back" and enter the codes manually.

If it's a local proxy of some sort, just change the settings in your copy of Internet Explorer (which is what the QDPortal Program uses). Start up Internet Explorer and, from the Menu Bar at the top, click View, Internet Settings, Connection, Proxy Server. You'll need to get the proxy information from whoever manages that server locally.

### 5. "Failed To Connect to WWW Server" Errors

Sometimes this is just a typo, or a case error: all letters in the DOCLINE address must be lower case: [wwwcf.nlm.nih.gov/docline/index.cfm](http://wwwcf.nlm.nih.gov/docline/index.cfm)

[Note the "wwwcf" above, which is different from the traditional start; make sure your address on the setup screen reflects this usage.]

Firewall and individual machine caching can also present an improper, or old, address instead of the current version of the page. As in this example:

*I cannot access my receipts when I go through QDPortal. I get the firewall error message.(error FW-1 at fwall0x: failed to connect to the WWW server) I can get to and use everything else, but I can't download those receipts*

This problem was solved by clearing the cache in IE. Here's the solution:

*Hi, I thought I would post my solution in case anyone else runs across this. We still aren't sure exactly why this was happening but decided that since I could access receipts in Netscape outside of QDPortal but not in IE5 outside or inside QDP, there had to be a problem with IE5. So we cleared the cache as advised in a message from NLM on the list from earlier, and that seems to have done the trick.*

[Thanks to Jodi Burgess for providing this solution.] Instructions from NLM on clearing the cache are in 6, next.

## 6. Clearing the Cache in IE4 and IE5.

NLM provides the following instructions to resolve the "DOCLINE requires you to login and accept a cookie" message that some users behind firewalls have been receiving:

Users must clear their browser cache (see below for a repeat of these instructions) and double check their browser options to ensure their settings are correct (see Browser Settings link at [http://www.nlm.nih.gov/docline/system\\_requirements.html](http://www.nlm.nih.gov/docline/system_requirements.html)).

~~~~~  
Instructions on clearing the cache:

(Microsoft Internet Explorer 4.x, Microsoft Internet Explorer 5.x).

\*\*\*\*\*

### Microsoft Internet Explorer 4.x

1. Select "Internet Options" from the View pull-down menu.
2. Click the "General" tab.
  - On the middle of this page is the Temporary Internet Files section.
  - Click the "Delete Files" button.
3. You will then be prompted by the dialog box, Delete files.
  - In this dialog box you are asked if you wish to Delete all files in the Temporary Internet Files folder.
  - Click the "OK" button.
4. On the bottom of this page is the History section.
5. Click the "Clear History" button.
6. You will then be prompted by the dialog box, Internet Properties.
  - In this dialog box you are asked if you wish to Delete all files in your History folder.
  - Click the "Yes" button.
7. Click the "OK" button.

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### Microsoft Internet Explorer 5

1. Select Internet Options from the Tools pull-down menu.
2. Click the General tab.
  - On the middle of this page is the Temporary Internet Files section.
  - Click the "Delete Files" button.
- 3.- You will then be prompted by the dialog box, Delete files.
  - In this dialog box, you are asked if you wish to Delete all files in the Temporary Internet Files folder.
  - Click the "OK" button.
- 4.- Find the History section on the bottom of this page.
- 5.- Click the "Clear History" button.
- 6.- You will then be prompted by the dialog box, Internet Properties.
  - In this dialog box, you are asked if you wish to Delete all files in your History folder.
  - Click the "OK" button.
- 7.- Click the "OK" button on the General tab screen.