What's New in QuickDOC 2.1.6

Changes in 2.1.6 from 2.1.5

Version 2.1.6 is a fairly major update (with added **individual Library, Patron and Department reports** that have been too long coming, along with changes for managing the movement of the QuickDOC.MDB database from one place to another, and the addition of **network-based-only installations**) from QuickDOC Version 2.1.5, adding the following:

1. New method of identifying **Loansome Doc Patrons** to match changes in DOCLINE 2.5 Status/Cancel displays.
2. New method for saving the **Borrower's ISO Borrower Reference Number** in requests received from ISO Borrowers through DOCLINE.
3. Improved ability to parse **Loansome Doc names with a leading prefix** (Dr., Mr., etc.).
4. New **Individual Library Detailed Reports** in both Borrow and Lend Grids.
5. New **Individual Patron and Department Detailed Reports**, run from the Borrow Grid.
6. New method for verifying **MOVED** QuickDOC.MDB Databases (see *Action items BEFORE any update to QD 2.1.6*, below, for a heads-up message for all those updating to 2.1.6).
7. Support for running QuickDOC only from a network, using machines with **no C: Drives**.

Changes in 2.1.5 from 2.1.4

Version 2.1.5 is a minor update from QuickDOC Version 2.1.4, adding the following:

1. New DOCLINE Referral Reason **LIC**, **License Restriction**, for Borrows and the same as a Rejection Reason for Lends.
2. Fixed an infelicity in Department Reports where Department Abbreviations that were numbers only would sometimes be formatted as Dates.
3. Fixed an unfelicity in the Copyright Report (All Items) where the ISSN for each title after the first one was printed in the following title.
4. QD now also saves the old LD Unique Identifier, in the Patron Notes field, so that it will be available if we ever need to re-import Loansome Doc Items from backups that were created in DOCLINE 2.3 or earlier.

Action items after any update from QD 2.1.3

The following is a list of items that should be checked after you have updated from QuickDOC version 2.1.3 (not necessary if you're updating from 2.1.4 or 2.1.5):

1. Check your **Journals Owned List** to be sure that the Owned checkbox is checked for current subscriptions only. See discussion under *Journal Title Owned now means currently subscribing* on page 19, below.

2. Check your *Loansome Doc Patron UserIDs* for DOCLINE 2.5 changes in how Patron Email address will be treated, as well as changes in the use of UserIDs. See discussion *on page 16*, below.

Action items BEFORE any update to QD 2.1.6

No matter which QuickDOC version you're updating from, if you're updating to version 2.1.6 there may be a noticeable change with regard to QuickDOC.MDB databases that have been marked as MOVED by QuickDOC in some previous change made using Locate QuickDOC DB under the Setup choice on the QuickDOC Menu Bar. Before installing and starting up QuickDOC version 2.1.6, read the section on *MOVED QuickDOC.MDB Databases* in version 2.1.6 (on page 9, below) before starting up the first time. This might spare you some confusion if the first-time startup of 2.1.6 finds that you've been connecting to a MOVED database without your knowing it.

QuickDOC and QDPortal

QDPortal Version 1.1.1 is compatible with **DOCLINE Version 2.5**, released in June, 2005, and is also compatible with **DOCLINE Version 2.6**, released in November, 2005. **QDPortal Version 1.1.2**, which was released along with **QuickDOC 2.1.6**, is only necessary for those QuickDOC users who don't have a C: drive. Otherwise, version 1.1.1 remains the current version, although it won't hurt to update to 1.1.2. Versions earlier than 1.1.1 are no longer supported with DOCLINE.

Download information for QDPortal (now ver 1.1.2) is always available at:

http://nnlm.gov/quickdoc/InstallQDP.html

Download information for QuickDOC (latest version 2.1.6) is always available at:

http://nnlm.gov/quickdoc/InstallQD.html

Watch for DOCLINE Login Messages

From time to time, DOCLINE posts general broadcast messages on the DOCLINE Login screen. Because QuickDOC automatically logs in, this screen can rush past pretty quickly. Watch for DOCLINE Broadcast Messages, therefore, not so much onscreen at the time of Login but when the screen returns after you click Log Out on the DOCLINE Menu.
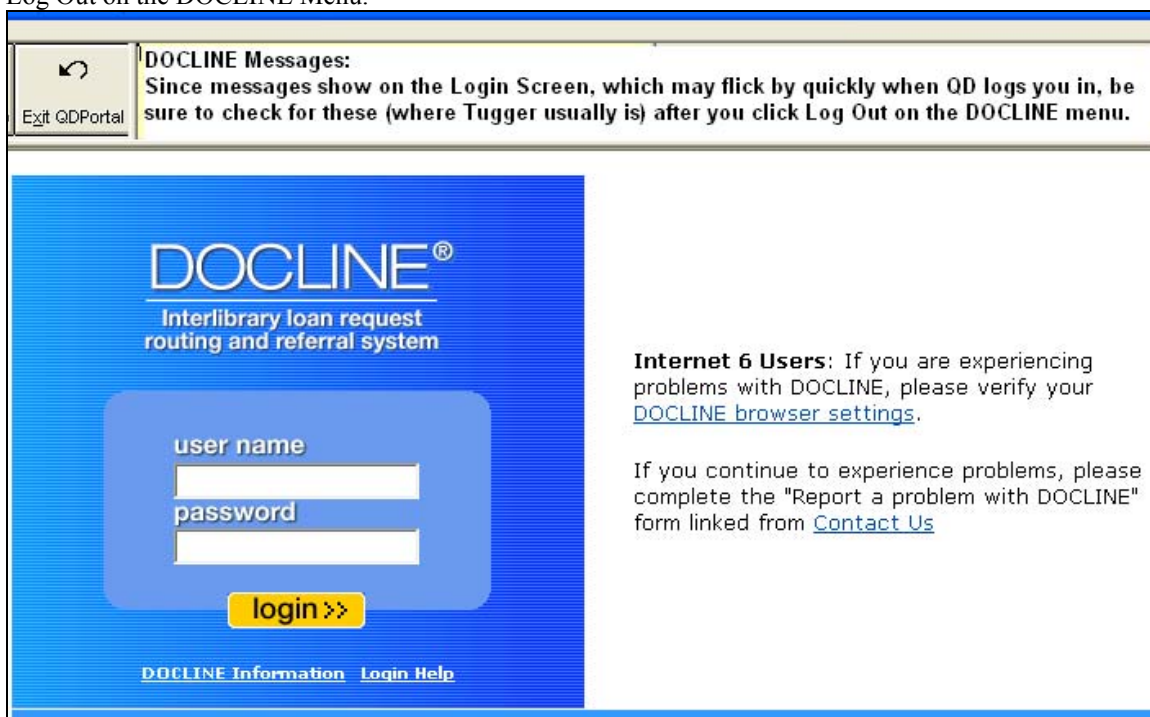
As a general rule, if you don't see a picture of the DOCLINE mascot, Tugger, on the right of this screen, it has been replaced by a message, so the quick-glance rule becomes: **No Tugger, check Message**.

PDF files in QDPortal under Adobe Acrobat 7.0

In **Entrez PubMed** (and also in DOCLINE displays) **full-text articles** available free are often highlighted by links to the full-text source. Clicking that link will bring you to the site, often with an option to print the full-text HTML source or the source formatted as an **Adobe Acrobat PDF file**. The latter choice is often the best, since PDF files can embed pictures and diagrams along with a compression scheme that reduces the file size substantially.

For **Adobe Acrobat** versions earlier than 7.0 (certainly in 5.x; I don't have a copy of 6.x to test on), the display of PDF documents in the **second QDPortal window** (QDPortal has to restrict the opening of new windows so that new instances of IE aren't introduced) is usually possible, either by clicking the link itself or by right-clicking the **PDF link** and choosing **Open in New Window** from the **Context Menu**. The Context Menu version is usually faster than clicking the link, since it doesn't have to run through the

QDPortal code, although the new window will be a QDPortal window (the title will be **DOCLINE Search Window**) rather than a new instance of IE.

In **Adobe Acrobat 7.x**, this doesn't seem to work (no idea why, but it could be some built-in security addition; QDPortal always checks before opening a new window, and **Acrobat 7** might resist this in some way). But there is a workaround. When QDPortal opens the second window to display the article on **PubMed Central**, instead of clicking on the PDF link, right-click that same link instead to get to the Context Menu, as shown below:
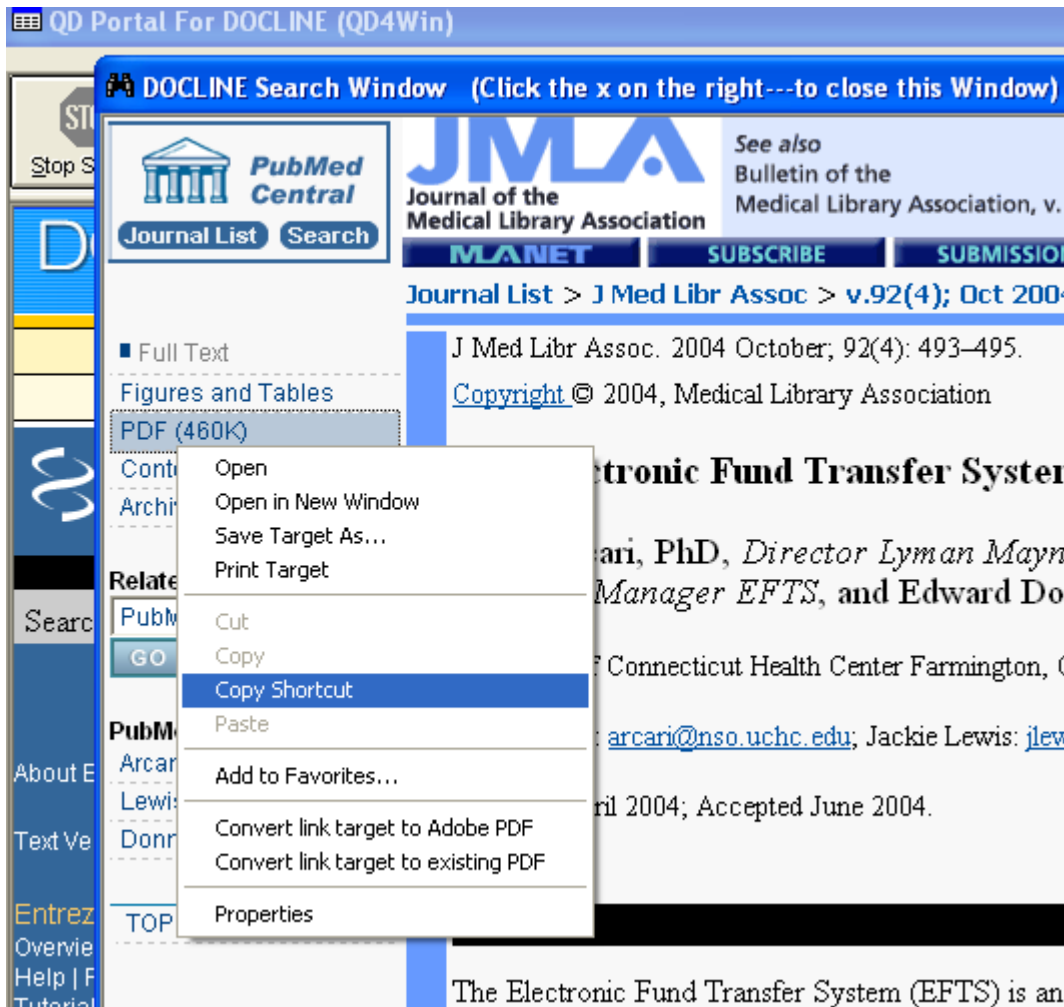
Choose the **Copy Shortcut** choice (instead of the **Open in New Window** choice, which doesn't seem to work in Acrobat 7.x). Open a new copy of Internet Explorer (or any browser) from the task bar, and paste this shortcut into the address box. In the case above, it's a PubMed Central article, which describes the EFTS system, as displayed below:
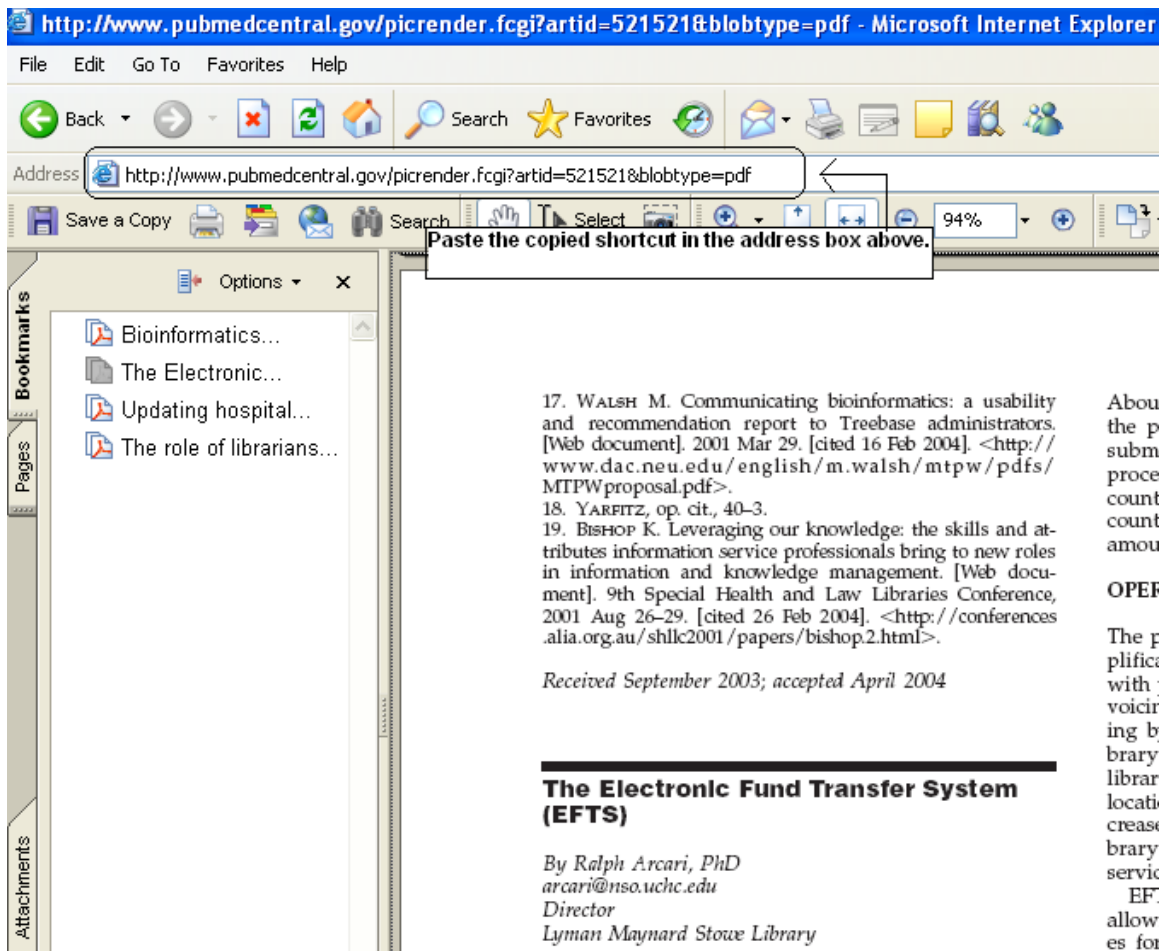
Because these sites are **outside of DOCLINE**, it won't matter that you're not logged into DOCLINE in the new browser window. You're only using that window to print or save the PDF document. When that's finished, close out the PDF/Browser window; click the x at the upper right to close the **DOCLINE Search Window** created by QDPortal, and then proceed as usual.

What happens on updating from QuickDOC 2.1.3?

Many of the steps for consolidation of QDPortal and QuickDOC are included in the update from version 2.1.3 (whether to 2.1.4, 2.1.5 or 2.1.6), with only the final joining of the programs left for version 2.2.0.

2.1.4 set the stage for the merging of QDPortal into QuickDOC, with other versions adding to that preparation. The following are some of the changes included in 2.1.4 (and following) that prepare the way for 2.2.0:

New \QDBorrow and \QDLoan folders created in database location

Since Version 2.2.0 will integrate the QDPortal program (which monitors the DOCLINE session, among other activities) into the main QuickDOC interface, many of the activities that used the C: drive on the local machine will no longer occur in that paradigm. In preparation, some of the backup and log functions were moved in version 2.1.4. These files are consequently shared by all users of the database.

See the information under *File Location Changes* on on page 6, below

Local data now in QuickDOC.MDB database rather than Registry

Only data that is specific to the machine will remain in the Registry, although some values will be replicated on the local machine as a backup to the main database values. This will prevent the slight differences that arose when local library values were re-typed into individual Setup Screens for each user. User preferences for screen size, column widths, etc., will continue to be kept under Current User in the Windows **Registry key** HKEY_CURRENT_USER\Software\VB and VBA Program Settings\QuickDOC.

MyLibraries.txt file now holds list of Libraries and DB Locations

Previous versions of QuickDOC kept the values of Library LIBID and the location of the QuickDOC.MDB database in the QuickDOC Registry key under NLM\LIBID and Database\Location. This meant that each new user on any machine (using Windows NT or later) had find the database at least once to have this value registered. Beginning with version 2.1.4, QuickDOC keeps the data in a **MyLibraries.txt** file located in the QuickDOC Program folder on the machine where it is being run, so that all users of that machine will have access to it (backup of these will continue to be kept in the Registry). The MyLibraries.txt file shows the information in the following comma-delimited format ("LIBID","Path to DB"), as in the following example:

>   "MAUBET","S:\Medical Library\QuickDOC\QuickDOC.MDB"

Although version 2.1.4 will only list one library, this format makes possible access to any number of QuickDOC.MDB databases, with different LIBIDs (a feature very important to those who serve at multiple locations of the same library system, who want to log into any number of Libraries within that system---which will all have different LIBIDs---and want to decide which QuickDOC.MDB database they want to be logged into in the current session). This capability (the idea that you can choose which QuickDOC you want to be---i.e., which QuickDOC.MDB database you will connect to) is planned for a future update.

File Location Changes

In preparation for the upcoming merge of QDPortal and QuickDOC in version 2.2.0, a number of QuickDOC data support files have been moved from the C: drive of the machine running the program to the folder where the QuickDOC.MDB database is located (and its subfolders). These log files and backup import files can now be shared among all users and will therefore become a single source for audit checking and backups.

Borrow Log Files are now located centrally.

Borrow log files, which had been located in the C:\QDBorrow folder of the machine running QuickDOC, are all now centrally located in a QDBorrow folder just beneath the location of the QuickDOC.MDB database. Borrow Log Files are accessible under Utilities on the QuickDOC Menu Bar and include the files:

Under old C:\QDBorrow folder		**In new DB\QDBorrow\SameFileName**
Old FileName	**Purpose**	**Purpose**
LDUpFail.log	Why the LD update failed	Same
NoLDSave.txt	Problem with Save of LD Receipt	Same
NoLDXUpd.txt	Problem with automatic update of LD	Same
NoSave.txt	Problem with Save of Borrow	Same
PatronNt.txt	Lists each new Patron Added.	Same

Lend Log Files are now located centrally.

Lend log files, which had been located in the C:\QDLoan folder of the machine running QuickDOC, are all now centrally located in a QDLoan folder just beneath the location of the QuickDOC.MDB database. Lend Log Files are accessible under Utilities on the QuickDOC Menu Bar and include the files:

Under old C:\QDLoan folder		In new DB\QDLoan\SameFileName
Old FileName	Purpose	Purpose
NewLibNt.txt	Lists each new Library Added.	Same
NoSave.txt	Problem with Save of Receipt	Same
NoUpdt.txt	Problem with automatic update of Lend	Same
OrphUpdt.txt	No Receipt to update, after 3 tries	Same
UpdtFail.log	Problem with Update of Receipt	Same

Backups of import data are now located centrally.

Backups of the raw data import files have been saved, up until version 2.1.4, in folders named **BackImp** under each of the C:\QDBorrow and C:\QDLoan folders on the machine running the import (which is also the machine that ran the DOCLINE session, by definition, since the import files were saved there). In version 2.1.4, these backup files are moved to a position just beneath the folder where the QuickDOC.MDB database resides. In fact, new QDBorrow and QDLoan folders are also created there, with their respective BackImp folders just beneath. This method aggregates all backups of the raw data to a single location, so that libraries with more than one workstation running QuickDOC will know precisely where to look for backup or audit information.

In a situation where the database is located at **S:\Medical Library\QuickDOC**\QuickDOC.MDB, the **backups of DOCLINE saved data for Borrows** will be at:

> **S:\Medical Library\QuickDOC\QDBorrow\BackImp**.

And the **backups of DOCLINE saved data for Loans** will be at:

> **S:\Medical Library\QuickDOC\QDLoan\BackImp**.

Because these text files are centrally located, and assuming that the QuickDOC.MDB database is on a server, they will also be backed up regularly, along with the database. If your QuickDOC.MDB database is located on the C: drive, you can decide on your own whether you want to back up these raw data files or just rely on the database backup.

If these backup files are shared by more than one machine, there is now the possibility, at least, that two users may want to have a single backup file open at the same time. Unlike the QuickDOC.MDB database file, which permits multiple user access, these text files can accommodate only one user at a time. If User B tries to open a BackImp file that User A is currently writing to, the following message box will appear:
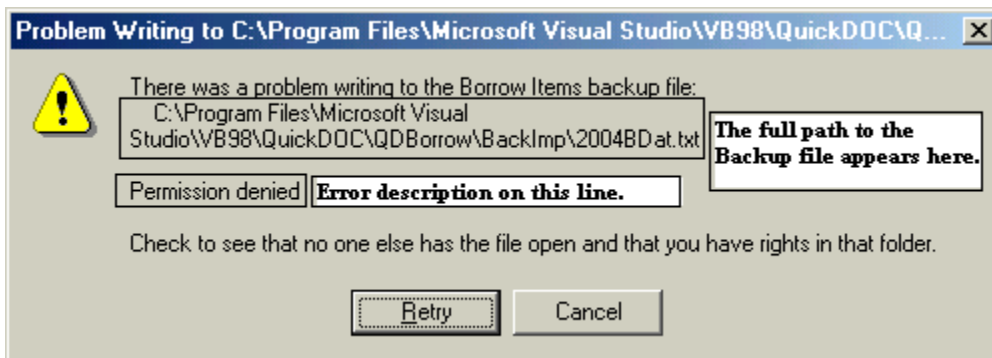
Permission denied indicates that the file is open in another process (or that it's marked **Read Only**, or that the user doesn't have the proper rights in this folder, but that shouldn't be the case here), so the write operation cannot proceed. In the case of these BackImp text files, unless the other machine is processing a very long import file, the time it needs to keep the file open should be fairly short. Clicking the **Retry button** after a brief pause should do the trick.

In cases where a Retry or two doesn't change the above message, there may be something else going on that requires some action. Either there is another machine running a long import, or there may be something wrong with the BackImp file. Clicking Cancel, above, will display the following message:
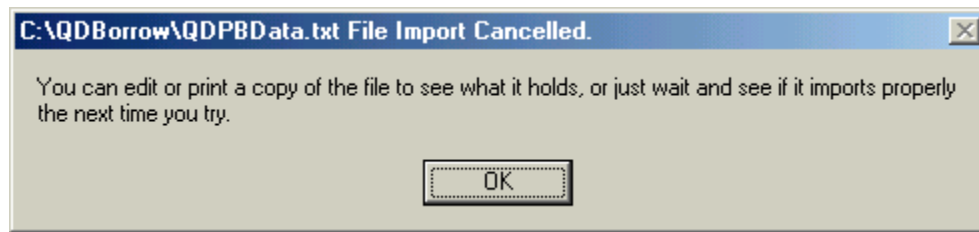
The original file is not deleted but is saved in the C:\QDBorrow or C:\QDLoan folder of the machine that received the message. Once the appropriate action is taken regarding the backup file, just click File, Import, and either QDPortal Borrow Items or QDPortal Lend Items, as appropriate. Alternatively, you can print out the file from the C:\QDBorrow or C:\QDLoan folder to see what it contains.

Because the time the program needs to keep these shared files open is brief, you should not see these contentions very often, and even when you do, Retry should allow you to proceed forthwith.

Machines without a C: Drive will now locate Import Files on network.

Although most of the Backup Import Files have been moved to the network (or just beneath wherever the QuickDOC.MDB database may be located), the QDPortal saves of DOCLINE activity are still saved in the **C:\QDBorrow** and **C:\QDLoan** folders of the machine running QDPortal.

QuickDOC, consequently, only looks in these two C: drive folders to see whether there is activity to import. Up until now, therefore, you couldn't run QuickDOC if you didn't have a **C: Drive** on your computer. Version 2.1.6 attempts to alleviate this situation, in advance of the joining together of the two programs in the near future.

In version 2.1.6, QuickDOC will check at startup to see whether the machine on which it is running has a C: drive (QDPortal 1.1.2, to be released alongside QuickDOC 2.1.6, will do the same). If the C: drive exists, all is as before: items are saved and imported from either C:\QDBorrow or C:\QDLoan. If no C: Drive exists, however, QuickDOC will use the **QDBorrow** and **QDLoan** folders located just beneath the folder where the **QuickDOC.MDB database** is located to save and import DOCLINE transactions.

Because these are, by definition, shared folders, there exists an increased possibility of collisions (e.g., someone on one machine trying to save DOCLINE data in a **QDPBData.txt file** while someone on another machine is attempting to import data into QuickDOC from an earlier QDPortal session that will have saved Borrow data into that same file). For the time being, then, if you are operating in such an environment (i.e., **no C: drive**; everything on the network), you'll want to take steps to ensure that no one is running a QDPortal DOCLINE session while someone else is doing an Import QDPortal in QuickDOC.

Once QDPortal is integrated into QuickDOC, of course, these interim import text files will be of only transitory duration, and the likelihood of collisions will be miniscule. Until then, however, if you have no C: drive it will be important that you manage DOCLINE activity and importing to be sure that they don't conflict.

As far as I know, there is only one QuickDOC location where this setup has been mandated (and you know who you are, Mike). If there are any others, please let me know; I want to know how this network-centric setup is working.

Meantime, I still recommend the traditional setup: **QuickDOC and QDPortal installed on the C: drive** (in C:\Program Files\QuickDOC and C:\Program Files\QDPortal, respectively), with **the QuickDOC.MDB database located on a central network share**, so that the data, which resides almost exclusively in the

database, is backed up regularly and is protected from any problems that may be experienced by the C: drive of any machine running QuickDOC. If the C: drive fails, it's easy to get a new one and re-install QuickDOC (pointing the new installation at the already-existing QuickDOC.MDB on the network); but if the database is also on that C: drive, then we're looking at various recovery procedures that are much more expensive and often unsuccessful. So I'm not enamoured of the "**No C: Drive**" solution (any more than most other Librarians are), and in fact I think it's a bad idea---increasing network traffic without necessarily improving security---but who cares what I think?

Keep me informed about other trends in this area, and I will also pass them along to you.

MOVED QuickDOC.MDB Databases

Whenever your QuickDOC.MDB database is moved from one location to another by using the **Locate QuickDOC DB** choice under **Setup** on the **QuickDOC Menu Bar** (which, by the way, is the **ONLY** way you should do this; any other method of making this change is fraught with peril!), QuickDOC performs the following actions:

1. After all unique items are moved from the old location to the new, the **QDVersion column** in the **aaaVer Table** of the old QuickDOC.MDB database is changed from whatever the old version number was to the word **MOVED**.

2. A new file, named **QDMoved** is created in the same folder as the old database, containing the following two lines:

    This DB Version=[the old db version of the db just changed to MOVED; e.g., 2.1.6]
    New Location=[the new database location; e.g., S:\Medical Library\QuickDOC.MDB]

Each time you start up QuickDOC the program looks in the **MyLibraries.txt** file, located in the QuickDOC Program folder, to get the path to the QuickDOC.MDB database. It then opens up that database and checks the **aaaVer table** to see what version it is (it should match the current running version of QuickDOC, of course). If it shows an earlier version than the current program version, QuickDOC will update the database by adding or editing fields, tables or indexes, as necessary, on startup.

If the aaaVer table shows a database version of **MOVED**, however, the following occurs:

1. The program checks for the existence of a **QDMoved file** to see where the real QuickDOC.MDB database is located, and which database version was moved.

2. If the QDMoved file doesn't exist, the program has no way of knowing where the file might have been moved and what version it might have been when it left; QD will register the database location as the current one and assign to the database its earliest version (2.0.0), so that it can be run through an updating process that will refresh and update any database tables that need to be updated. Other QuickDOC.MDB databases that may be found can be imported into this updated database by using the **File**, **Import**, **External QuickDOC DB** choice on the **QuickDOC Menu Bar**.

3. If the QDMoved file exists, it will point us toward what it shows as the current QuickDOC.MDB database location and will also let us know which version of the database has been moved. This is the scenario that describes a situation where one user moves the db from one central location to another. And then another user, who was pointing to the first location, which he/she had always theretofore pointed to, suddenly logs in and finds that the database isn't where it was thought to be. In most cases this is an accurate description of what has happened. In other cases, though, you may want to use the Locate QuickDOC DB choice under Setup on the QuickDOC Menu Bar of each machine to be sure that you locate your QuickDOC.MDB in the same spot for all.

Some sample scenarios:

1. <u>Another user has moved the database to a folder called Export since the last time you logged on</u>.

   When you start up QuickDOC, you'll see the following **Database Moved From This Location** message:
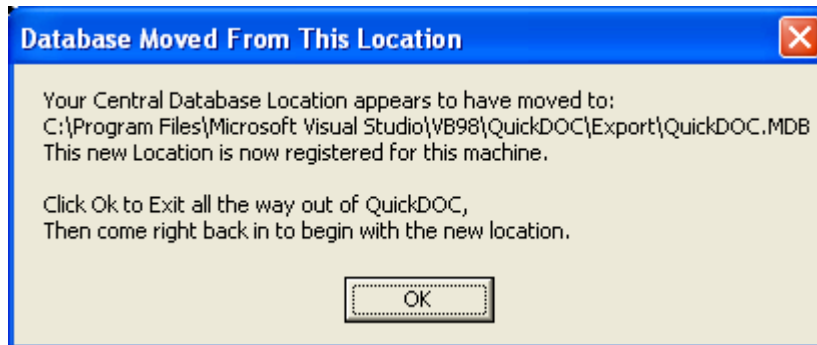
   Click Ok and QuickDOC will reset all your internal pointers to the new location and will exit the program. Start QuickDOC right up again and it will proceed with the login to the QuickDOC.MDB database that is located at the new location.

2. <u>The new location change was made mistakenly, and should be moved back to the original location</u>.

   QuickDOC always checks for this situation before moving and, to prevent a loop back and forth from new to old location, it will change the aaaVer table in the original location from MOVED to the version number, and will delete any QDMoved file, so that any move back to that location will be successful. If, after you start up the second time, you get another Database Moved From This Location message pointing back to the first location, you can be sure that it will be the last, and that your next startup will be successful.


   Your next startup will return to the above location, and will remain there (assuming no one decides to move the database again!).

3. <u>Using the Locate QuickDOC DB choice under Setup on the Menu Bar, you choose a location that already has a QuickDOC.MDB file, which shows **the same version number** as the database you're moving</u>.

   Since there are no database changes to worry about, QuickDOC simply runs through the tables of the current database and moves over any unique records to the new one.
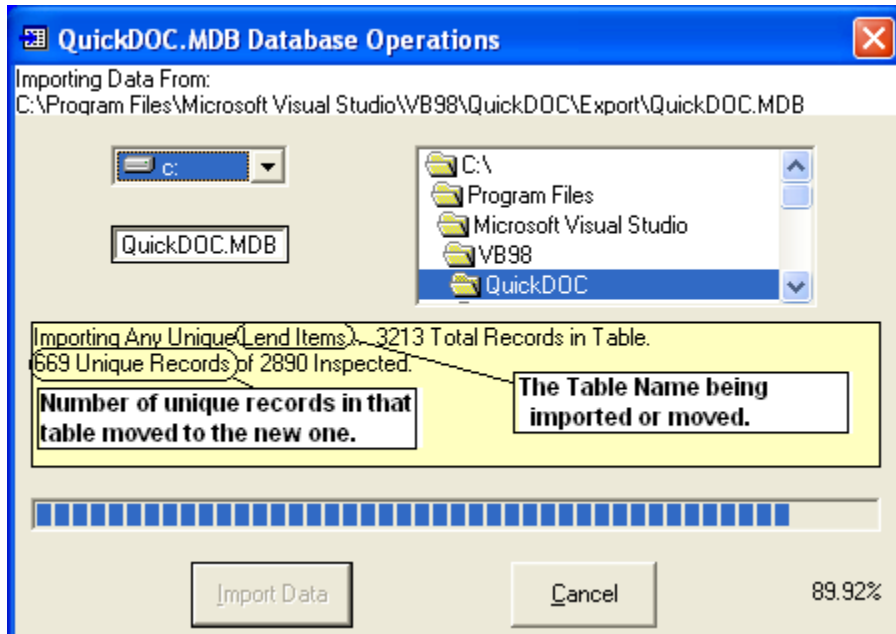
The yellow box shows you the progress of each table (we're moving tblLendItems in the example above) as any unique records are moved from the old database to the new. Once this process is finished, you can continue to work, since all pointers now point to the new database and there are no update operations necessary on the database itself. The new database location should appear in the Status Bar beneath the blue QuickDOC screen once you finish the transfer process.
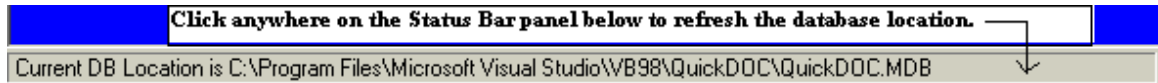
If you don't see the change, click the bar once to cause it to refresh the display with the new location.

4. Using the Locate QuickDOC DB choice under Setup on the Menu Bar, you choose a location that already has a QuickDOC.MDB file, which shows **an earlier version number** from the database you're moving.

This database needs to be checked for updated fields and tables before any data is moved over from the first database. You will see a **Database Needs to be Updated** message box:
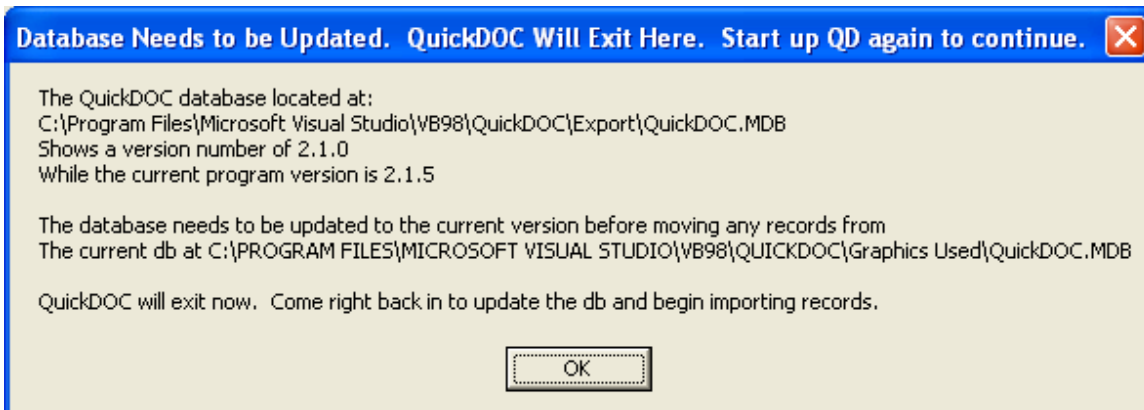
In this case, QuickDOC will set a few pointers and will then exit. (If, for any reason, the program doesn't fully exit, just exit all the way out yourself before continuing.) Start right up again and QuickDOC will perform the database updates needed, and will then proceed to importing any unique items from the previous QuickDOC.MDB.

5. Using the Locate QuickDOC DB choice under Setup on the Menu Bar, you choose a location that already has a QuickDOC.MDB file, but this database announces it's been **MOVED to a different location altogether** from the database you're moving.

If you try to locate the database in a folder that already includes a QuickDOC.MDB file with its **aaaVer** table set to MOVED (and which has been moved to some other folder from the one you're coming from), you'll see **An Earlier Database Was Moved From This Location!** Message::
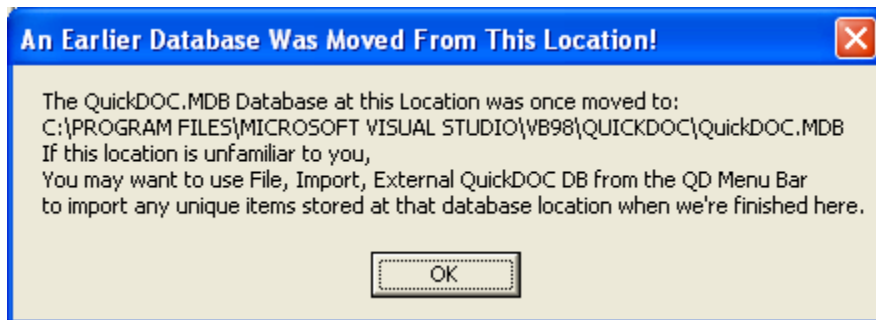
Rather than try to follow a path that may have been long since abandoned, QuickDOC will set its pointers to this location and assume that you will use the File, Import, External QuickDOC DB choice on the Menu Bar if you feel there may be some unique items in the database referred to above. If this database shows that it has been moved with a database version equal to your current version (as in #3, above), it will proceed on to the transfer of unique items. If the database was of a version less than the current version (as in #4), you will get the exit message and will proceed as above.

6. Someone has already moved the unique items from the database you are moving from.

You'll see a Database Has Been Imported message like the following:
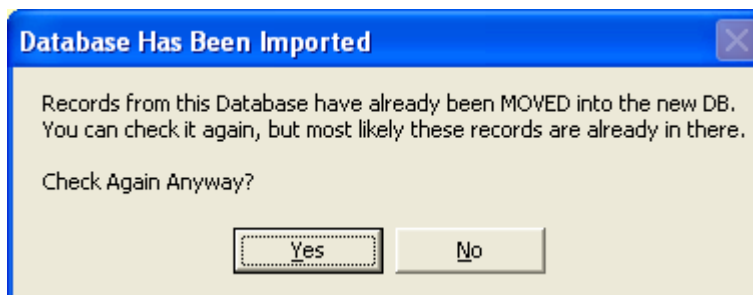
In most cases you can click No, since the first user who moved the database has probably also moved over the unique items, but if you're unsure you can always run through the process again by clicking Yes.

Lend Items

2.1.6 Checks Delivery and Billing Addresses for compatibility

When we first receive a request from another Library, we assume that the Delivery Address at the top of the request will be the same as the Billing Address that appears at the bottom. In most cases they are (or they're within the same city, at least). In some cases, however, they are intentionally different. Either way, this discrepancy should be noted and the current QuickDOC user alerted that there may be a conflict. Version 2.1.6 of QuickDOC checks at the time that each new library is created for the following:

1. That the Delivery (Send To) State/Province is the same as the Billing State/Province;
2. That the Delivery (Send To) City is the same as the Billing City.

In most cases both will match. What this check will provide is a chance to use the Library Billing information as the primary (Delivery) information for a new library where the Delivery and Billing values are very different.

When such a Library is about to be added, you'll see a message box similar to this one (which observes a difference between the State or Province that is contained in the Delivery Address and the State/Prov that is suggested bythe first two letters of the DOCLINE LIBID):
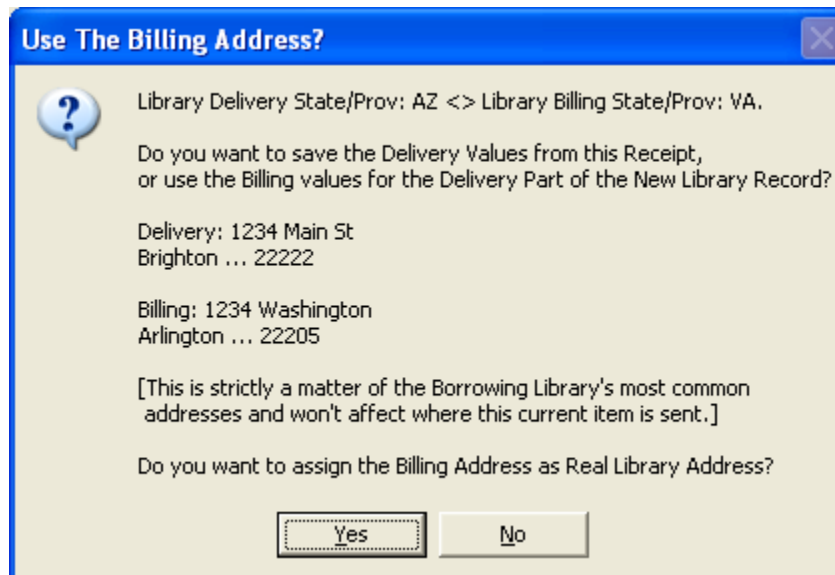
Click Yes to use the Billing values for this new Library, or No if indeed the Library's primary Delivery Address is very different from the Billing Address. Also remember that you can always change either of these by editing the Library record.

2.1.6 Captures ISO Number in Borrower's Patron field

DOCLINE 2.6 now permits ISO Libraries to make requests on DOCLINE, where they will be routed through the typical DOCLINE structure. If you Receipt an item on DOCLINE that comes from an ISO Library, it will look much the same as any other Receipt, except that it will include an **ISO Borrower Ref #** at the end of the **Bill To: line**.

If there is room, QuickDOC will include this number along with the Patron in Library Invoices and EFTS Uploads (so that Borrowers will have an additional locator for verifying charges). A typical **Patron with ISO Borrower Number** in an Invoice to an **ISO Borrower Library** might look like this:

Jones, James [ISO=12345]

This might be truncated, as the length of the entire Patron field approaches 50, but the truncation will begin at the "ISO=" part of the request, in order to retain as much of the actual **ISO Borrower Reference Number** as possible.

Library Billing

Payments as Borrower added to Billing, EFTS Menu

Version 2.1.4 adds a new Payments as Borrower choice to the Billing, EFTS Menu.
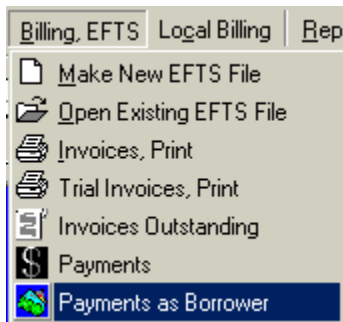
This choice brings up the **Payments To Lenders (and EFTS)** form. In previous versions, this form was only accessible from the **Borrow Items Backfile Grid**, by clicking into the **Chrg** field and then clicking the **To Pmts** button at the upper right.

Entering EFTS Deposits

This new method of access is intended primarily to facilitate entry of **EFTS Deposits**, so that QuickDOC can produce the new **EFTS Activity** and **EFTS Balances** Reports (see under QuickDOC Reports, below). Enter an **EFTS Deposit** by using **Payment Type Deposit** and **Payment Method EFTS**. If you are an EFTS Library, these will be your default settings whenever the form is brought up from the Billing, EFTS Menu. As a further step to indicate that you want this deposit to be applied to your EFTS account, type in **efts** as the **Pmt or Request Number**.

EFTSUP is the Library Record devoted to EFTS activity. Enter the amount of the Deposit and any identifying information in the **Amount This Payment** and **Payment Notes** fields, respectively. Clicking the **Add button** files this record in the **tblBorrDeposits Table** of the QuickDOC.MDB database.

You can also use this form to enter a **Lending Library Deposit Account** with a specific Library (which will be, almost certainly, a non-EFTS Library, since you won't need such a thing with a Library that uploads its Lending activity charges to EFTS). For Library Deposits, use Payment Type Deposit, Payment Method anything but EFTS, and the LIBID of the Library (instead of EFTSUP) in the **Paid to** box.

Rush Requests now noted on Library Invoices

QuickDOC Patron and Department Local Invoices have long noted Rush Requests on the Invoice itself (in order to explain what would otherwise seem an anomaly in the list of charges), but this capability was absent in the Library Invoice. This has been fixed in QuickDOC 2.1.4. Library Invoice with a Rush Charge will show an **R** to the right of the charge, and an explanation, [**R = Rush**], next to the total charge at the end of the Invoice. Changes will appear as follows:

Req No.	Year Title	Citation	Patron	Charge	Date Filled
14401546	1995 J rheumatology	Jun;22(6):1193-6	Jones	$3.00	02-Jul-04
14401634	1998 J general internal medicine	Nov;13(11):757-61	Jones	$13.00 R	02-Jul-04
Total Items For MAUVBD: 2			**Total Charges:**	**$16.00 [R = Rush]**	

Borrow Items

Automatic Updating of Journal Title Owned now current year only.

Versions of QuickDOC earlier than 2.1.4 would change the **Title Owned** value in the **tblJrnls Table** to True if an **incoming Loansome Doc request** indicated either of the following:

15

Because this value is used to automatically change **CCG** values to **CCL** (borrowed items from journal titles to which we have a current subscription should **not** be included in **CCC reports**) and because it is all too common nowadays that current subscriptions are cancelled while a lengthy backfile may be kept, this behavior changed too many CCGs to CCLs and has been changed in version 2.1.4.

When a Loansome Doc request shows either of the above **Holdings statements**, QuickDOC will also check the Year of the request. If the **Journal Year** stated in the request is the current year, QuickDOC will assume that this **SERHOLD** information is correct and will update the **Owned** value to True.

QuickDOC will continue to check the Owned value, and change the CCG to CCL if it shows true, so it will be necessary, for the time being, to ensure that the **Owned value is interpreted as currently subscribing**. In an update planned for the near future, QuickDOC will provide an interface for automatic updating of holdings from SERHOLD and it will then be possible to check both the Owned value and the End Year or End Volume values to confirm an open entry. This will ensure an accurate CCL change.

In the meantime, interpret Owned as currently subscribing and change your Owned values accordingly. QuickDOC will now only change the Owned to True on current year Loansome Doc requests, so there will be no more incorrect owned values for current journals (although you'll have to uncheck the Owned checkbox at the end of each year for journals whose subscription you have not renewed), but you'll need to clean up those that were added by earlier versions and whose subscription has expired. See the entry under Journals, below, for information on checking and editing your **Journals Owned List**.

Loansome Doc Changes

Version 2.5 of DOCLINE made some changes in the way Loansome Doc receipts are displayed, and consequently, how they are imported into QuickDOC. These include the following:

Maximum Cost field replaces old DOCLINE: (Yes or No) field

In DOCLINE 2.3 and earlier, there was a line printed in Loansome Doc Receipts that indicated whether the Patron wanted the item to be transferred to DOCLINE if the Local Library couldn't fill it, or not. DOCLINE 2.5 changed this approach to a **Loansome Doc Patron Maximum Cost** determination: Whatever Maximum Cost the LD Patron was willing to pay would be determinative of whether or not the item would be referred on to DOCLINE. In version 2.1.3 of QuickDOC, this **DOCLINE = Yes** or **DOCLINE = No** information was saved in the **Notes** field of the request.

Most people will just use the Maximum Cost field of the Loansome Doc printout to decide whether to refer on to DOCLINE. QuickDOC 2.1.4 will also compare this **Maximum Cost LD Patron** information against the Local Charge Profile stored with the Patron (or Department), and put a warning in the BorrowNotes field when the Local Charge might be greater than the Max Cost.

The Notes field is displayed by placing the cursor over the Note icon displayed at the right of the Request Number cell. Because Local Charges aren't finally computed until the item is Received, you should treat this as a heads-up rather than the final word.

Loansome Doc Patron UserIDs

DOCLINE 2.5 and later no longer include a line for Patron UserID. Instead, the LD Patron logs onto the system using a **unique email address**. QuickDOC can use the email address to look upthe Patron

record, but you'll need to check to ensure that all LD Patrons have a single email address, or that Patrons with multiple records have a unique email address for each, and that they use that login when they want delivery to that address.

DOCLINE 2.5 and later also includes a hidden field in the Patron Email line for **Id_patron_seq**, which stands for the unique key field (**Sequence Number**) in that Patron's record at NLM.

Holding:	Library reports holding title, but NOT vol/yr
Need By:	N/A
Maximum Cost:	**$15.00**
Patron Email:	test69@nlm.nih.gov [Id_patron_seq=159388] appears here
Identifer:	123456abc

QuickDOC can also look up the Patron record using this field, and will save it as **Loansome Doc UI** on the Misc Tab of the Patron Information form.

Loansome Doc Users may now enter a local identifier field

DOCLINE 2.5 and later includes the ability for the LD Patron to enter a local id number during the Registration process. Libraries can decide what to call this number (depending on your local custom; the example below uses "University ID" as the prompt that pops up when the LD Patron registers.

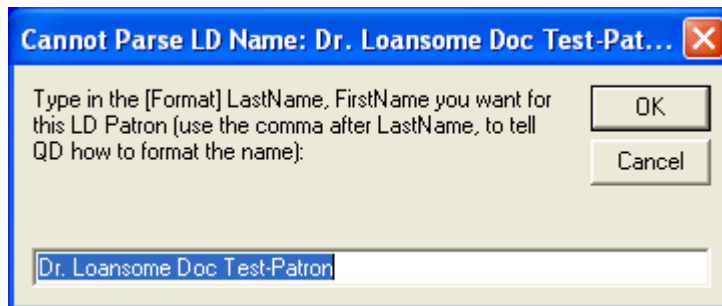 This Tag is also used in the LD Request itself.

If you tell QuickDOC, on the DOCLINE Fields Tab of the Local Preferences Form, what your Local ID Number is called (we're just using 'Identifier' in the example below), QuickDOC can check this field in LD Requests and use it to look up the correct Patron.

Enter your Library's local identifier name (if established): |Identifier|

This is the name you use for LD Patron ID.

The number checked is the Local ID that appears on the first Tab of each Patron Information Form record.

New Loansome Doc User Names can be re-configured on import.

Although Version 2.1.6 of QuickDOC does a better job of parsing unusual Loansome Doc names, there still may be cases where Loansome Doc requests (over which we have no control as to how the LD patrons designate their names and addresses), are set up in an unusual fashion (unusual, at least, from what QuickDOC expects). In such cases QuickDOC will stop, on import of a request from what might be a new patron with an unusual format, to ask you what you think the format of this new LD Patron might be. The input box might look as follows:
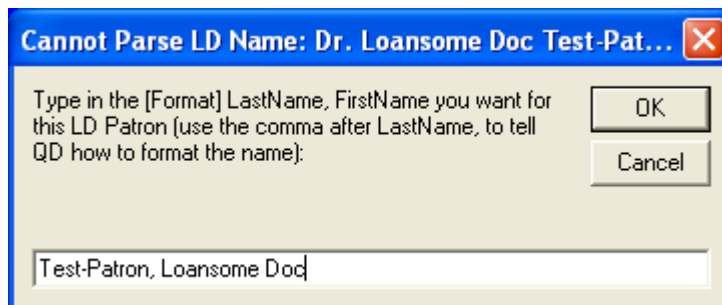

If you recognize a true Lastname, Firstname that would best describe the LD Patron above, re-type the selected text above with something like this format of the new Patron Name (use only Lastname, Firstname and add the other values after the Patron Record is created). It doesn't matter, for our purposes, that this is a totally invented example; we'll later look up this patron first by ld_patron_seq (sequence number) and then by email address, so the format of the Patron Name will be the very last of the lookups.

If you want to create a new LD Patron with a Lastname, Firstname of Test-Patron, Loansome Doc, you might change the above as follows:

Click Ok if this is how you want the new LD Patron added. Otherwise, you can always edit the record later. But to keep your work at a minimum, always assume that Lastname, Firstname is the best format for QuickDOC to recognize. And a space after each comma is also required, if you choose to create your own files that might later be imported into QuickDOC.

Journals

Journal Title Owned now means currently subscribing

The **tblJrnls Table** includes a field for **JrnlOwned**, which indicates whether the Journal Title is owned by the Library. It was originally intended to include both current subscriptions and closed entries that were maintained as backfiles, and we will return to this interpretation once QuickDOC can accurately import Holdings information from SERHOLD, but for now this value should be interpreted as **currently subscribing**. Because this value is used to automatically change **CCG** values to **CCL** (borrowed items from journal titles to which we have a current subscription should not be included in **CCC reports**), until we have accurate holdings information, we must use this restrictive interpretation of the Owned value.

QuickDOC will continue to check Loansome Doc requests for current **Holdings statements**, but it will also check the Year of the request. Only if the **Journal Year** stated in the request is the current year, will the program assume that this **SERHOLD** information is correct and update the **Owned** value to True.

Nevertheless, while this value will be accurate for the current year's changes, there will no doubt by Journal Titles in your database now showing Owned that were incorrectly updated by earlier versions of QuickDOC. These will need to be edited to show only the currently subscribing interpretation.

Journals Owned List

You can see a list of your **Journal Titles Owned** by typing the word **owned** into the Title box and either pressing Enter or clicking the **Title Search button**:

This will give you a list of all titles in your tblJrnls Table where the Owned value is True.
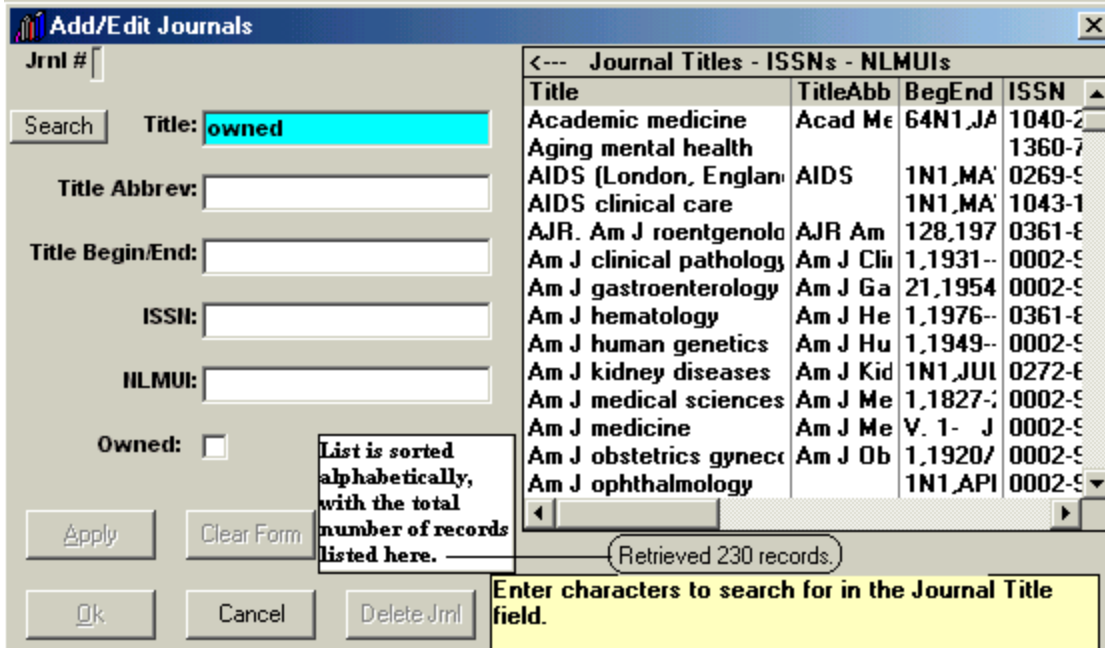
In the case above, the search retrieved 230 records. The **Owned column** is also retrieved, but you would need to use the horizontal scroll bar at the bottom of the list to see it:
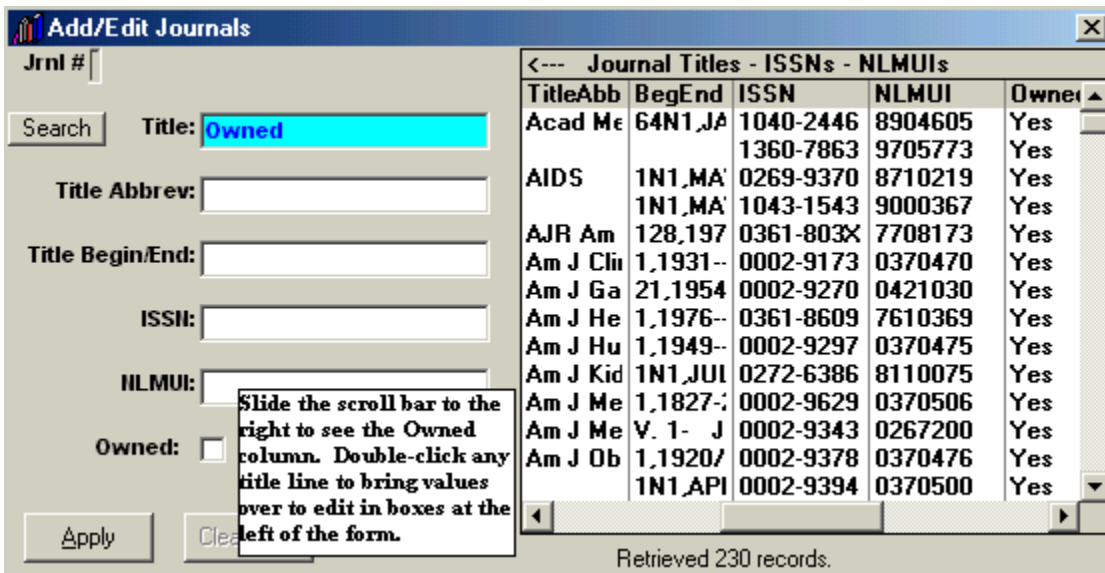
Since the journals are retrieved in alphabetical order, you can use the vertical scroll bar, at the right side of the list, to scroll down to find a Journal to which you are **NOT currently subscribing**. In our example, we're using *American Psychologist* as a journal title whose subscription has been cancelled. Double-click that line on the list to bring that title information over to the edit boxes on the left. Then uncheck the **Owned checkbox** to indicate that this is not a current subscription.

Add/Edit Journals

Jrnl # 630

Search   Title: Am psychologist

Title Abbrev:

Title Begin/End: 1,1946--

ISSN: 0003-066X

NLMUI: 0370521

Owned: ☐   *Scroll down the title list, double-click each title not renewed, and uncheck the Owned box.*

Apply   Clear Form   New Title

Click Apply after each change.

Ok   Cancel   Delete Jrnl

Global Title Change

Title	TitleAbb	BegEnd	ISSN
Am J physical medicine	Am J Phy	67N1,FE	0894-9
Am J physiology	Am J Phy	1,1898--	0002-9
Am J psychiatry		78,1921	0002-9
Am J public health		61,1971	0090-0
Am psychologist		1,1946--	0003-0
Am review of respirator		80,1959	0003-0
Anesthesiology	Anesthe:	1,1940--	0003-3
Ann emergency medici	Ann Eme	9,1980--	0196-0
Ann internal medicine	Ann Inte	1N1,JUL	0003-4
Ann neurology	Ann Neu	1,1977--	0364-5
Ann otology, rhinology.	Ann Otol	6,1897--	0003-4
Ann plastic surgery	Ann Plas	1,1978--	0148-7
Ann rheumatic disease	Ann Rhe	1,1939--	0003-4
Ann Royal College of S	Ann R C	1,1947--	0035-8

<--- Journal Titles - ISSNs - NLMUIs

Retrieved 230 records.

Check this box to indicate that MAUBET owns this journal.

Click **Apply** after making the change and we're ready to move on to the next not-renewed title.

Add/Edit Journals

Jrnl #   *Title Am psychologist changes filed.*

Search   Title:

Title Abbrev:

Title Begin/End:

ISSN:

NLMUI:

Owned: ☐

Apply   Clear Form   New Title

Ok   Cancel   Delete Jrnl

Title	TitleAbb	BegEnd	ISSN
Am J obstetrics gyneco	Am J Ob	1,1920/	0002-9
Am J ophthalmology		1N1,API	0002-9
Am J orthopsychiatry	Am J Ort	1,1930--	0002-9
Am J pathology	Am J Pat	1,1925--	0002-9
Am J physical medicine	Am J Phy	67N1,FE	0894-9
Am J physiology	Am J Phy	1,1898--	0002-9
Am J public health		61,1971	0090-0
Am psychologist		1,1946--	0003-0
Am review of respirator		80,1959	0003-0
Anesthesiology	Anesthe:	1,1940--	0003-3
Ann emergency medici	Ann Eme	9,1980--	0196-0
Ann internal medicine	Ann Inte	1N1,JUL	0003-4
Ann neurology	Ann Neu	1,1977--	0364-5
Ann otology, rhinology.	Ann Otol	6,1897--	0003-4

<--- Journal Titles - ISSNs - NLMUIs

After making changes and clicking apply, we're ready to move to the next record to edit.

Check this box to indicate that MAUBET owns this journal.

By the way, since the Journal Titles List is read-only, you won't see the change under the Owned column, but rest assured that it has been made in the database. In fact, if you later return to that line in the list and double-click to bring those values over for editing, you'll see that the Owned box is indeed unchecked.

Once the automatic updating of Holdings from SERHOLD is ready, we can return to the original value of Owned, meaning either currently subscribing or holding a closed entry backfile, but for now it will mean currently subscribing only. When we're back to the original meaning, we can use the Owned value plus the

detailed tblHoldings Table information to do automatic lookups from Document Delivery Request forms to triage out requests that we can fill in-house, etc.


QuickDOC Reports

Borrow Reports

Single Library (Lender) Report printed from Borrow grids.

In version 2.1.6, Borrow Reports for activity with a single Library are available in either the **Requests Outstanding** or the **Borrow Item Backfile** grids. In most cases you'll want to use the Backfile grid, since there is no date setting in Requests Outstanding. The report will be titled **Detailed Borrow Report – Lender** (followed by the Lender's LIBID).

If you do run the report from the **Requests Outstanding** grid, QuickDOC will use the **Default Dates** (either the first of the year or the first of the month six months ago, whichever is longer) as the **Begin Date** and **Today** as the **End Date**, but since the record you are looking at is, by definition, still outstanding, it won't appear in the resulting Detailed Borrow Report - Lender and, in some cases, the report itself might therefore be empty. If this is the case you'll see the familiar **No Records To Print** message box, similar to the following:
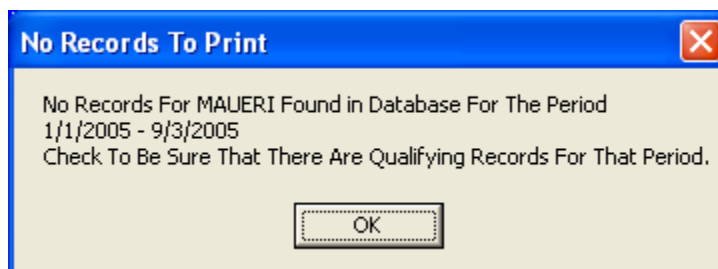
Running the report from the Borrow Item Backfile grid is clearly the best choice. Since there is no **Libr** column in the **Local Billing grid**, there is, therefore, no **Print Lender Rpt** Print Option there, but the other grids make it possible to print individual reports for any Lender.

To prepare the report, set the dates in the Borrow Item Backfile grid to match those you want in the **Detailed Borrow Report – Lender (One Library)**, then click **Search**. This will populate the grid with all Borrowed Items during that period.

At that point, find the Library whose activity you want to print out in the **Libr** column of the grid (to sort the list by Lender, you can left-click the **header** of the Libr column---that box at the top of the column, labelled **Libr**---and choose **Sort Ascending**, to easily find a row with the appropriate LIBID to report). Click once into that Libr cell (it will turn light blue, as shown in the **MAUHCM** cell below) to expose the hidden **Print Lender Rpt** button at the upper right:

The image shows a "Borrow Item Backfile" window with search tabs: Search By Date & ReqNo, Search By Patron, Search By Dept, Search By Lender (LIBID), Search By Status of Request, Go To Outstanding Only. Toolbar buttons: Search, By Dates, Print Lender Rpt, To Libs. A callout reads: "After clicking into the Libr column of the Lender you want to print, click the 'Print Lender Rpt' button below, to get the printout."

Search Request Numbers — Containing — 383 Record(s) retrieved — Use ? As WildCard For Any Single Letter or Number

Field is for the LIBID of Lending Library. May Be Up To 6 Characters Long. Select From DropDown Box, or Add a New Library By Choosing 'To Libs' [or Alt-T].

The Printout for this Library will include all MAUHCM (in this case) loans during whatever Beginning Date and End Date has been set for this grid. Unlike the Quick Jrnl Report, which is automatically printed to Preview, these reports are printed to the default printer,

All Borrow Item Backfile - By Request Number

RQNO	Patron	Dept	Libr	Chrg	Yea	Title	ItemT	Item	Sent	Recd	Status
15931934	Mahmoo	ANES	MAUHCM	$0.00	1998	J cardiothorac	Journ	Copy	1/3/2005	1/3/2005	Receive
15931937	Mahmoo	ANES	MAUHCM	$0.00	2000	J Am Society c	Journ	Copy	1/3/2005	1/3/2005	Receive

Click the **Print Lender Rpt** button to print the report to whatever your default printer might be.

Detailed Borrow Report - By Lender: MAUHCM
01-Jan-05 to 04-Sep-05

The Date is the date the item was received.   The Charge is the amount charged by the Lender.

4-Sep-2005   Beth Israel Deaconess Medical Center (01-Jan-05 to 04-Sep-05)   Page 1

Item	Lender	ReqNo	Date	Title	Citation	Charge
	MAUHCM is a member of Library Groups: BBLC, MA.					
1	MAUHCM	15931937	03-Jan-05	2000 J Am Society of Echocardiography	Jun;13(6):599-607	$0.00
2	MAUHCM	15931934	03-Jan-05	1998 J cardiothoracic vascular anesthesi	Feb;12(1):10-5	$0.00
3	MAUHCM	15931935	05-Jan-05	1999 J cardiothoracic vascular anesthesi	Oct;13(5):521-7	$0.00
4	MAUHCM	15993522	11-Jan-05	2004 Obesity research	Aug;12(8):1197-211	$0.00
5	MAUHCM	16040253	14-Jan-05	2003 J computer assisted tomography	May-Jun;27(3):392-8	$0.00
6	MAUHCM	16308500	11-Feb-05	1996 Pediatric research	Sep;40(3):438-43	$0.00
7	MAUHCM	16646488	18-Mar-05	2001 Pediatric crit care medicine	Oct;2(4):346-8	$0.00
8	MAUHCM	16646158	18-Mar-05	1996 Acta paediatrica (Oslo, Norway	Sep;85(9):1024-8	$0.00
9	MAUHCM	16707953	28-Mar-05	1994 J cardiothoracic vascular anesthesi	Feb;8(1):19-23	$0.00
10	MAUHCM	16707951	28-Mar-05	1995 J cardiothoracic vascular anesthesi	Feb;9(1):113-4	$0.00
11	MAUHCM	16715315	28-Mar-05	1970 Arch surgery (Chicago, Ill	Mar;100(3):229-31	$0.00
12	MAUHCM	16726875	29-Mar-05	1985 J hospital infection	Mar;6 Suppl A():87-91	$0.00
13	MAUHCM	16707950	29-Mar-05	1994 J clinical anesthesia	Mar-Apr;6(2):148-51	$0.00
14	MAUHCM	17304109	07-Jun-05	1960 Am J surgery	May;99():657-64	$0.00
15	MAUHCM	17308162	09-Jun-05	2004 J computer assisted tomography	May-Jun;28(3):351-60	$0.00
Total 15 Items From Children's Hospital					Total Charged By MAUHCM:	$0.00

This report corresponds to a single library section in the Detailed ILL Report for Borrowed Items.

If you get a **printer error**, or get only the **Print Preview** screen here, it may be that your **default printer** isn't recognized. Try printing one of the Summary Reports to clear out any printer logjam, and then re-try this report.

Object Not Found

Problem Printing to Printer Selected. Check Printer Availability or Select a Different Printer from Printer Selection List.

OK

This report will only include items loaned by other libraries; it won't include any Loansome Doc items you filled from your collection, nor any Copy Service items. If you try to print a report for your own LIBID (as you might for Loansome Doc items you filled for yourself), you'll see a message to that effect:
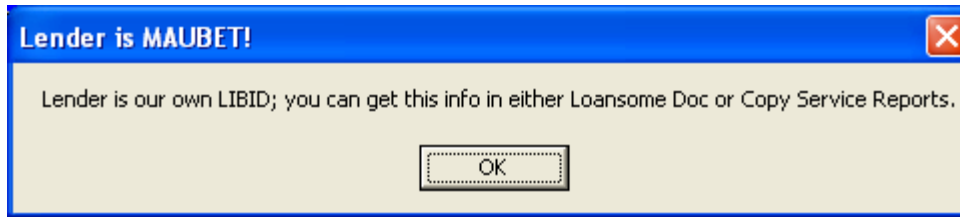
Use the Loansome Doc or Copy Service Reports to get this info.

Single Patron Detailed Report printed from Borrow grids.

In version 2.1.6, Borrow Reports for activity of a single Patron are available in either the **Requests Outstanding** or the **Borrow Item Backfile** grids. In most cases you'll want to use the Backfile grid, since there is no date setting in Requests Outstanding. The report will be titled **Detailed Borrow Report – Patron** (followed by the Patron Name).

If you do run the report from the **Requests Outstanding** grid, QuickDOC will use the **first of the year** as the **Begin Date** and **Today** as the **End Date**, but since the record you are looking at is, by definition, still outstanding, it won't appear in the resulting Detailed Borrow Report - Patron and, in some cases, the report itself might therefore be empty. If this is the case you'll see the familiar **No Records To Print** message.

To prepare the report, set the dates in the Borrow Item Backfile grid to match those you want in the **Detailed Borrow Report – Patron (One Patron)**, then click **Search**. This will populate the grid with all Borrowed Items during that period.

At that point, find the Patron whose activity you want to print out in the **Patron** column of the grid (to sort the list by Patron, you can left-click the **header** of the Patron column---that box at the top of the column, labelled **Patron**---and choose **Sort Ascending**, to easily find a row with the appropriate Patron Last Name to report). Click once into that Patron cell (it will turn light blue, as shown in the **Mahmoo** cell below) to expose the hidden **Print Patron Rpt** button at the upper right:

Click the **Print Patron Rpt** button to print the report to whatever your default printer might be.

The single Patron Borrow report also includes Library charges in [brackets] for each item & total

Detailed Borrow Report - By Patron: Mahmood, F... ..
01-Mar-05 to 31-Mar-05

6-Sep-2005			Beth Israel Deaconess Medical Center (01-Mar-05 to 31-Mar-05)				Page 1
Item[LC]Patron/Dept/Status		ReqNo	Date	Title		Citation	Charged [As Library] As Patron

Mahmood, Feroze (MD)

			ReqNo	Date	Title	Citation	[As Library]	As Patron
1		ANES	16462625	02-Mar-05	1994 J clinical anesthesia	Mar-Apr;6(2):148-51	[$10.00]	$5.00
2	C	ANES	C..0503257	25-Mar-05	1999 Eur heart J	20(7):496-505	[$0.00]	$0.00
3	C	ANES	C..0503256	25-Mar-05	1990 Circulation	81(5):1488-1497	[$0.00]	$0.00
4	C	ANES	C..0503255	25-Mar-05	2004 Internal medicine (Tokyo, Japan)	Jan;43(1):3-4	[$0.00]	$0.00
5	C	ANES	C..0503254	25-Mar-05	2004 Internal medicine (Tokyo, Japan)	Jan;43(1):55-58	[$0.00]	$0.00
6	C	ANES	C..0503253	25-Mar-05	2004 Texas Heart Institute J / from Texa	31(2):137-142	[$0.00]	$0.00
7	C	ANES	C..05032510	25-Mar-05	2000 J cardiovascular surgery	Feb;41(1):53-56	[$0.00]	$0.00
8	C	ANES	C..05032511	25-Mar-05	1992 J thoracic cardiovascular surgery	Aug;104(2):534-535	[$0.00]	$0.00
9	C	ANES	C..05032512	25-Mar-05	1991 J Am College of Cardiology	Jul;18(1):65-71	[$0.00]	$0.00
10	C	ANES	C..0503258	25-Mar-05	1996 J Am College of Cardiology	27():108-114	[$0.00]	$0.00
11	C	ANES	C..05032513	25-Mar-05	1996 Am J cardiology	Aug;78(4):444-450	[$0.00]	$0.00
12		ANES	16707951	28-Mar-05	1995 J cardiothoracic vascular anesthesi	Feb;9(1):113-4	[$0.00]	$5.00
13		ANES	16707949	28-Mar-05	1999 Echocardiography (Mount Kisco, N.Y.	Jul;16(5):501-508	[$0.00]	$5.00
14		ANES	16707953	28-Mar-05	1994 J cardiothoracic vascular anesthesi	Feb;8(1):19-23	[$0.00]	$5.00
15		ANES	16707950	29-Mar-05	1994 J clinical anesthesia	Mar-Apr;6(2):148-51	[$0.00]	$5.00
16		ANES	16726240	31-Mar-05	1996 J cardiothoracic vascular anesthesi	Oct;10(6):748-55	[$0.00]	$5.00

Total 16 Items For Mahmood, Feroze [Library paid: $10.00]   Total Charged to Mahmood, Fer: $30.00

This report corresponds to a single Patron section in the Detailed Patron Report. It includes Library charges as well as Patron Charges (but not a charge paid by Department, which shows up on the Detailed Department Report).

Single Dept Detailed Report printed from Borrow grids.

In version 2.1.6, Borrow Reports for activity of a single Department are available in either the **Requests Outstanding** or the **Borrow Item Backfile** grids. In most cases you'll want to use the Backfile grid, since there is no date setting in Requests Outstanding. The report will be titled **Detailed Borrow Report – Dept** (followed by the Department abbreviation).

To prepare the report, set the dates in the Borrow Item Backfile grid to match those you want in the **Detailed Borrow Report – Dept (One Dept)**, then click **Search**. This will populate the grid with all Borrowed Items during that period.

At that point, find the Dept whose activity you want to print out in the **Dept** column of the grid. Click once into that Dept cell (it will turn light blue, as shown in the **ANES** cell below) to expose the hidden **Print Dept Rpt** button at the upper right:

Click the **Print Dept Rpt** button to print the report to whatever your default printer might be.

The single Dept Borrow Report also includes Library charges in [brackets] for each item and total.

Detailed Borrow Report - By Dept: ANES
01-Mar-05 to 31-Mar-05

6-Sep-2005		Beth Israel Deaconess Medical Center (01-Mar-05 to 31-Mar-05)					Page 1
Item[LC]Dept/Patron		ReqNo	Date	Title	Citation	Charged [As Library] As Dept	

				ANES (Anesthesia Dept)			
1		Mahmood, Feroze	16462625	02-Mar-05	1994 J clinical anesthesia	Mar-Apr;6(2):148-51	[$10.00] $0.00
2		Pratt, Steven	16623807	17-Mar-05	1993 J nurse-midwifery	Jul-Aug;38(4):199-207	[$0.00] $0.00
3		Pratt, Steven	16624200	18-Mar-05	1984 Br J obstetrics gynaecology	Feb;91(2):97-8	[$0.00] $0.00
4		Pratt, Steven	16624199	18-Mar-05	1985 Br J clinical practice	Feb;39(2):59-62	[$11.00] $0.00
5	C	Mahmood, Feroze	C..0503257	25-Mar-05	1999 Eur heart J	20(7):496-505	[$0.00] $0.00
6	C	Mahmood, Feroze	C..0503256	25-Mar-05	1990 Circulation	81(5):1488-1497	[$0.00] $0.00
7	C	Mahmood, Feroze	C..0503255	25-Mar-05	2004 Internal medicine (Tokyo, Japan)	Jan;43(1):3-4	[$0.00] $0.00
8	C	Mahmood, Feroze	C..0503254	25-Mar-05	2004 Internal medicine (Tokyo, Japan)	Jan;43(1):55-58	[$0.00] $0.00
9	C	Mahmood, Feroze	C..0503253	25-Mar-05	2004 Texas Heart Institute J / from Texa	31(2):137-142	[$0.00] $0.00
10	C	Mahmood, Feroze	C..05032510	25-Mar-05	2000 J cardiovascular surgery	Feb;41(1):53-56	[$0.00] $0.00
11	C	Mahmood, Feroze	C..05032511	25-Mar-05	1992 J thoracic cardiovascular surgery	Aug;104(2):534-535	[$0.00] $0.00
12	C	Mahmood, Feroze	C..05032512	25-Mar-05	1991 J Am College of Cardiology	Jul;18(1):65-71	[$0.00] $0.00
13	C	Mahmood, Feroze	C..05032513	25-Mar-05	1996 Am J cardiology	Aug;78(4):444-450	[$0.00] $0.00
14	C	Mahmood, Feroze	C..0503258	25-Mar-05	1996 J Am College of Cardiology	27():108-114	[$0.00] $0.00
15		Mahmood, Feroze	16707949	28-Mar-05	1999 Echocardiography (Mount Kisco, N.Y.	Jul;16(5):501-508	[$0.00] $0.00
16		Mahmood, Feroze	16707951	28-Mar-05	1995 J cardiothoracic vascular anesthesi	Feb;9(1):113-4	[$0.00] $0.00
17		Mahmood, Feroze	16707953	28-Mar-05	1994 J cardiothoracic vascular anesthesi	Feb;8(1):19-23	[$0.00] $0.00
18		Mahmood, Feroze	16707950	29-Mar-05	1994 J clinical anesthesia	Mar-Apr;6(2):148-51	[$0.00] $0.00
19		Mahmood, Feroze	16726240	31-Mar-05	1996 J cardiothoracic vascular anesthesi	Oct;10(6):748-55	[$0.00] $0.00
Total 19 Items For ANES				[Library paid: $21.00]		**Total Charged to ANES:** $0.00

This is the total charged & paid by Dept (not Patron).

This report corresponds to a single Dept section in the Detailed Dept Report. It includes Library charges as well as Dept Charges (but not a charge paid by the Patron, which shows up on the Detailed Patron Report).

Copy Service Request Number is truncated in Patron, Dept reports

In version 2.1.6, because of a space premium on the lines of Detailed Patron and Dept Reports, Copy Service Request Numbers beginning **COPY** will be truncated on the reports to **C..** before the rest of the number. Request Number **COPY0502221** will therefore show up in reports as **C..0502221**, as shown below.

		Badman, Michael	For display purposes, COPYnnnnnnn items will show as C..nnnnnnn in reports.			
1		ENDO	15965115	07-Jan-05	2004 Curr pharmaceutical design	10(29):3651-62
2		ENDO	15993522	11-Jan-05	2004 Obesity research	Aug;12(8):1197-211
3		ENDO	15993523	11-Jan-05	2004 Curr opinion in pharmacology.	Dec;4(6):583-8
4		ENDO	15985845	12-Jan-05	2004 Recent progress in hormone research	59():267-85
5		ENDO	16308500	11-Feb-05	1996 Pediatric research	Sep;40(3):438-43
6		ENDO	16308502	14-Feb-05	1979 Exp brain research. Experimentelle	Oct;37(2):283-98
7		ENDO	16308501	14-Feb-05	2001 Neuroimmunomodulation	9(1):41-8
8	C	ENDO	C..0502221	22-Feb-05	2004 Obesity surgery	Sep;14(Sup 1):S40-S48
9		ENDO	17125510	16-May-05	1991 Nucleic acid techniques in bacteria	():115-175

Copy Service Report now permits use of alternate LIBID

In versions 2.1.3 and earlier, using **Source Copy Service** always assumed that the Lending Library referred to would be your own LIBID. After a discussion on the QuickDOC-L List, it was clear that this assumption was too restrictive. Consequently, version 2.1.4 allows any LIBID in the Lender category, although the local LIBID is still preferred, since it most clearly states the true situation.

The Copy Service Report (By Patron) will now sort first by LIBID, then by Patron, then by Date Received, as illustrated below:

Copy Service Report (By Patron)
01-Jan-03 to 31-Dec-03

12-Jan-2004				**Beth Israel Deaconess Medical Center (01-Jan-03 to 31-Dec-03)**			**Page 1**
Item	**Patron**	**JobNo**	**Date**	**Title**	**Citation**	**Pages**	**Local Chrg**
1	Frangioni,	COPY0312113	12-Dec-03	1992 Cell	Feb 7;68(3):545-560	16	$5.00
2	McHugh, We	COPY0311253	25-Nov-03	2000 JONA'S healthcare law, ethics regul	Mar;2(1):29-41	13	$5.00
3	Richardson	COPY0311251	25-Nov-03	2003 Lancet	Jan;361(99353):250-252	3	$0.00
4	Sundar, Su	COPY0002	20-Oct-03	1991 Hypertension	Jun;():1072-1077	6	$0.00
5	Zhou, Li	COPY0312031	03-Dec-03	1993 Am J gastroenterology	88():618-619	2	$5.00

Total 5 Items From Beth Israel Deaconess Medical Center [My LIBID]   **Total Charged By MAUBET:** **$15.00**

1	Richardson	COPY0001	20-Oct-03	1999 Urology	54():385-391	7	$0.00

Total 1 Items From Beth Israel Deaconess Medical Center [Made-up LIBID]   **Total Charged By MAUNEN:** **$0.00**

TOTAL ALL ITEMS: 6   **TOTAL PAGES: 47**   **TOTAL ALL CHARGES:** **$15.00**

> Copy Service Report can now include other ad hoc LIBIDs besides your own LIBID if you want to track some other Copy Service characteristic. Using your own LIBID is still the default case.

If you create artificial LIBIDs to track some usage here, be sure to assign them the **Free Charge Profile**, since we don't want any charges to obtain on the Library-toLibrary level, only on the Local Patron or Department level, if you do indeed charge your Patrons, Departments or Cost Centers for Copy Service work.

Likewise, in other reports where Copy Service items are to be excluded (such as **Copyright Reports**, **Journals Borrowed Reports**, etc.), where earlier versions of QuickDOC had simply excluded any items filled by **your Library's LIBID**, version 2.1.4 now specifically searches for **Source Copy Service** and excludes these irrespective of the Lending Library LIBID. Nevertheless, be aware that items filled by your own LIBID will continue to be excluded from most reports, with the exception of Loansome Doc Filled In-House, Copy Service, and Local Invoices, since they represent local **Fair Use** rather than **Interlibrary Loan** considerations.

EFTS Activity Report

If you're updating directly from QuickDOC 2.1.3, then you might want to read the What's New in QuickDOC 2.1.5 document (http://nnlm.gov/quickdoc/QDNew215.pdf), which explains the new EFTS Activity Report. You can also refer to the description in the current QuickDOC Manual and QuickDOC Help for detailed information on the EFTS Activity Report.

In particular, see "How to set up you initial EFTS Activity Report," "Step-by-Step instructions for managing EFTS Activity Reports," and "EFTS Credits to correct Borrower Debit Summary," all in QuickDOC Help and in the PDF Manual (QuickDOC.PDF in the QuickDOC Program folder; also available under Help on the QuickDOC Menu Bar).

Lend Reports

Single Library (Borrower) Report printed from Lend grids.

In version 2.1.6, Lend Reports for activity with a single Library are available in either the **Items Received** or the **Lend Item Backfile** grids. In most cases you'll want to use the Backfile grid, since there is no date setting in Items Received (none of these have been filled, or rejected, after all, and therefore would not be included in a report of successful activity!). The report will use the Begin and End Dates set on the grid and will be titled **Detailed Lend Report – By Library:** (followed by the Borrower's LIBID).

If you run the report from the **Items Received** grid, QuickDOC will use the **Default Dates** (either the first of the year or the first of the month six months ago, whichever is longer) as the **Begin Date** and **Today**

as the **End Date**, but since the record you are looking at is, by definition, still not acted upon, it won't appear in the resulting Detailed Lend Report – By Library and, in some cases, the report itself might therefore be empty. If this is the case you'll see the familiar **No Records To Print** message box.

To prepare the report, set the dates in the Lend Item Backfile grid to match those you want in the **Detailed Lend Report – By Library**, then click **Search**. This will populate the grid with all completed Lend Items during that period.

At that point, find the Library whose activity you want to print out in the **Borrower** column of the grid (to sort the list by Borrower, you can left-click the **header** of the Borrower column---that box at the top of the column, labelled **Borrower**---and choose **Sort Ascending**, to easily find a row with the appropriate LIBID to report). Click once into that Borrower cell (it will turn light blue, as shown in the **MAUNEP** cell below) to expose the hidden **Print Library Rpt** button at the upper right:

Click the **Print Library Rpt** button to print the report to whatever your default printer might be.

This report corresponds to a single library section in the Detailed ILL Report for Loaded Items.

If you get a **printer error**, or get only the **Print Preview** screen here, it may be that your **default printer** isn't recognized. Try printing one of the Summary Reports to clear out any printer logjam, and then re-try this report.