

What's New in QuickDOC 2.1.7

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Changes in 2.1.7 from 2.1.6

Version 2.1.7 is an update that reflects changes made in DOCLINE 2.7 (released late March, 2006). These include recognizing the new DOCLINE Level of Service terms **RUSH** and **Urgent Patient Care**, as well as the changes in how EFTS is displayed on printouts. Rush and Urgent Patient Care requests now display in yellow on Requests Outstanding and Items Received grids.

There's also now a method for displaying a **PO Number on Library Invoices** for Libraries that must provide those on invoices sent to Borrowing Libraries (see below).

Changes in 2.1.6 from 2.1.5

Version 2.1.6 was 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, including 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.
7. Support for running QuickDOC only from a network, using machines with **no C: Drives**.

A full description of 2.1.6 changes is available at <http://nmlm.gov/quickdoc/QDNew216.pdf>.

Changes in 2.1.5 from 2.1.4

Version 2.1.5 was 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 infelicity 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.

A full description of 2.1.5 changes is available at <http://nmlm.gov/quickdoc/QDNew215.pdf>.

QuickDOC and QDPortal

QDPortal Version 1.1.2 is compatible with **DOCLINE Version 2.7**, released in late March, 2006, and is also compatible with **DOCLINE Version 2.6**, which was released in November, 2005. Because we need to be able to recognize text files saved during earlier versions of DOCLINE, QuickDOC and QDPortal will always be backward compatible with all earlier DOCLINE versions.

Download information for QDPortal (latest version 1.1.2) is always available at:

<http://nmlm.gov/quickdoc/InstallQDP.html>

Download information for QuickDOC (latest version 2.1.7) is always available at:

<http://nmlm.gov/quickdoc/InstallQD.html>

Rush and Urgent Patient Care DOCLINE Requests

DOCLINE 2.7 introduces two new **Level of Service** categories: **RUSH** and **Urgent Patient Care**. These two categories join **Color Copy** in the **Special Handling** group. The Urgent Patient Care service level is defined as "process and ship immediately." The RUSH service level is defined as "process and ship by end of day." DOCLINE's **Time-Triggered Actions** have also changed for rerouting "Rush" and "Urgent Patient Care" requests. Requests not receipted on the day the request routed will reroute the same night. Receipted requests not acted upon will reroute after 1 business day.

Since both **service levels** are displayed to the left of the line on DOCLINE where Item Type (e.g., Journal) and Item Form (e.g., Copy) are displayed, QuickDOC 2.1.7 will now look for these words as well when importing data (screen shots below are from NLM 2.7 examples).

Email (PDF) To: ill@testing.edu

Shelby University
Main Scuba Library ILL Dept
1234 Main Street
Bldg 35C, Room 4F
Ventura, CA 93455

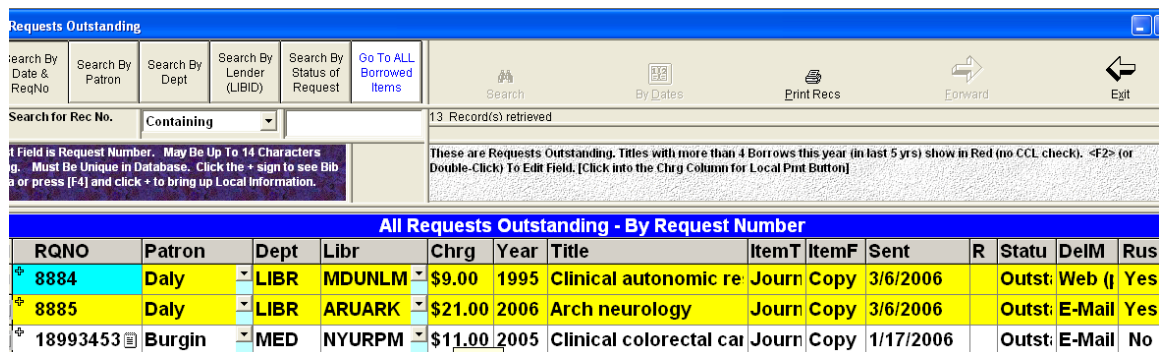
Service level above
Normal displays here
as "RUSH" or "Urgent
Patient Care"

RUSH DOCLINE: Journal Copy

Title: International journal of obesity (2005)
Title Abbrev: Int J Obes (Lond)
Citation: 2006 Jan 17; [Epub ahead of print]
Article: The office candy dish: proximity's influ

QuickDOC versions earlier than 2.1.7 will fail to record Type and Form information on Rush and Urgent Care requests.

Since Urgent Patient Care items are defined as even more critical than Rush items, QuickDOC will identify these also as **Rush = Yes** on both Borrow and Lend Grids. All Rush requests are moved to the top of the display (out of the usual chronological order) in the **Requests Outstanding Grid** (currently outstanding Borrow Requests) and will be painted yellow as shown below.



Requests Outstanding

Search By Date & ReqNo | Search By Patron | Search By Dept | Search By Lender (LIBID) | Search By Status of Request | Go To ALL Borrowed Items

Search | By Dates | Print Recs | Forward | Edit

Search for Rec No. Containing 13 Record(s) retrieved

Field is Request Number. May Be Up To 14 Characters. Must Be Unique in Database. Click the + sign to see Bib a or press [F4] and click + to bring up Local Information.

These are Requests Outstanding. Titles with more than 4 Borrows this year (in last 5 yrs) show in Red (no CCL check). <F2> (or Double-Click) To Edit Field. [Click into the Chrg Column for Local Print Button]

RQNO	Patron	Dept	Libr	Chrg	Year	Title	ItemT	ItemF	Sent	R	Statu	DeIM	Rus
8884	Daly	LIBR	MDUNLM	\$9.00	1995	Clinical autonomic re	Journ	Copy	3/6/2006		Outst:	Web (j	Yes
8885	Daly	LIBR	ARUARK	\$21.00	2006	Arch neurology	Journ	Copy	3/6/2006		Outst:	E-Mail	Yes
18993453	Burgin	MED	NYURPM	\$11.00	2005	Clinical colorectal car	Journ	Copy	1/17/2006		Outst:	E-Mail	No

The top two here are either Rush or Urgent Patient Care requests and should be received before the end of the day. Other outstanding items are then displayed in order of their Sent date.

Current Lend Rush requests (those just Received) are also moved to the top of the display in the **Items Received Grid** (items currently received on DOCLINE but **not yet acted upon**) and will be painted yellow as shown below.

ReqN	Borrower	Year	Title	Chrg	Typ	Form	EFT	Recd	Stat	Deliv	MaxC	Rush	Source
8419	TNUTNK	2006	Biophysical J	\$11.00	Jou	Copy	Yes	2/28/2006	Rece	E-Mai	\$11.00	Yes	DOCLINE
8417	TNUTNK	2006	Biophysical J	\$11.00	Jou	Copy	Yes	2/28/2006	Rece	E-Mai	\$11.00	No	DOCLINE
8418	TNUTNK	2006	Biophysical J	\$11.00	Jou	Copy	Yes	2/28/2006	Rece	E-Mai	\$11.00	No	DOCLINE

The top request here is either a Rush or an Urgent Patient Care request and should be sent off before the end of the day. Other Received items are then displayed in order of their Received Date and LIBID.

EFTS Participant Requests

DOCLINE 2.7 changes the way EFTS Libraries will use the system. It adds a new routing limit for EFTS Participants only and changes EFTS from a Library Group to a filter in Institution Search. It also changes the usage on DOCLINE Borrow and Receipt displays from **Epayment** to **EFTS Participant**.

DOCLINE: Journal Copy **EFTS Participant** ← Displays if borrower is EFTS participant
 tional journal of obesity (2005)
 es (Lond)

QuickDOC versions earlier than 2.1.7 will fail to record EFTS information on Lend Receipts.

Bill via EFTS only Requests

DOCLINE 2.7 also changes the way **Bill To** information is displayed. Because we can now direct that requests be routed only to EFTS Libraries, Receipts will print out with a line beginning "**Bill via EFTS only to:**" as well as "**Bill to:**" toward the bottom of the request.

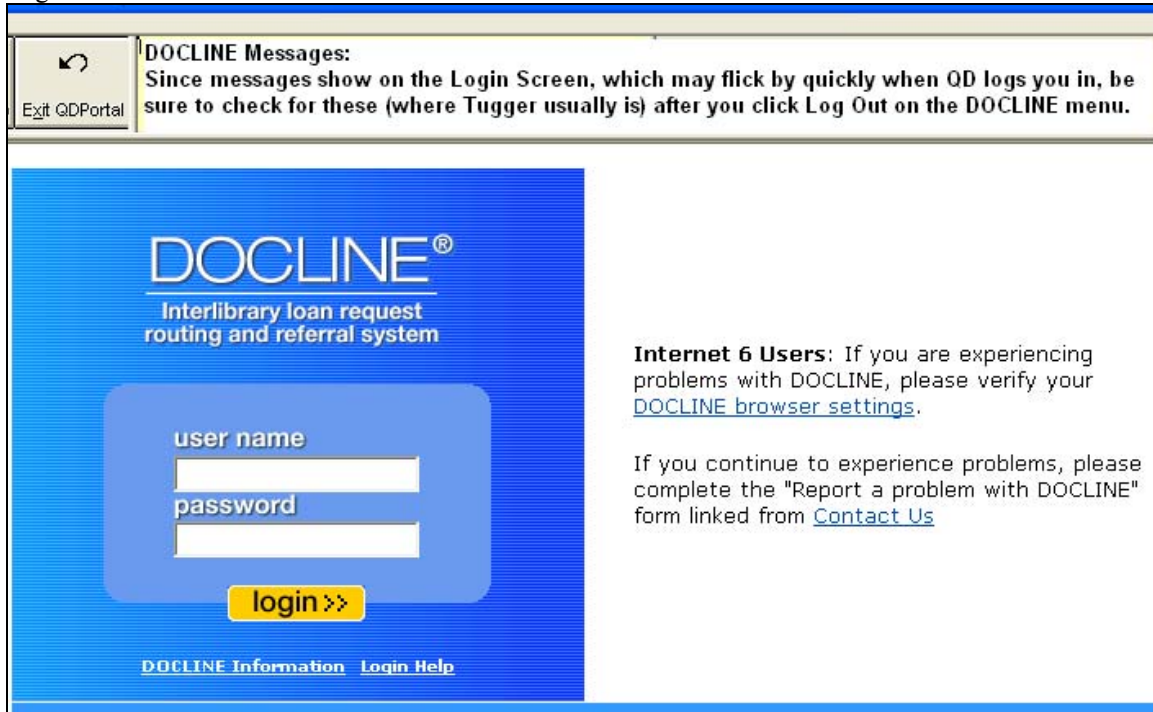
Ariel: 111.22.33.4 Alternate Ariel: ariel@testing.edu
Alternate Delivery: Ariel,Web(PDF) ←
 Comments: **Comments to lenders display here ...**
 Routing Reason: Routed to CAUSOC in Serial Routing - cell 1
 This material may be protected by copyright law (TITLE 17,U.S.C.)
Bill via EFTS only to: CAUJLM ←
 Shelby University
 Main Scuba Library Billing
 1234 Main Street
If routing limited to EFTS only, Bill to displays as "Bill via EFTS only"

QuickDOC versions earlier than 2.1.7 will fail to record **ALL** Lend Receipts for EFTS Libraries, since these look only for the "Bill To" line to know when the request is complete.

QuickDOC doesn't monitor the **Alternate Delivery** line. Nevertheless, this is a major DOCLINE addition, and QuickDOC will always record any change you make to the Delivery Method on DOCLINE and change the local record accordingly.

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.**

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 2.1.7 attempts to alleviate this situation, in advance of the joining together of the two programs in the near future.

In version 2.1.7, 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 2.1.7, 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.

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 enamored 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.

Library Billing

PO Numbers may now be printed on Library Invoices

Version 2.1.7 adds the ability to print a Borrowing Library's **Purchase Order Number** on Invoices sent to that Library. Lenders who do a large volume of business may encounter Borrowers who need PO Numbers printed on their invoices and before version 2.1.7 this wasn't possible.

Version 2.1.7 includes a change that will check the **Library Account Number** field on each Borrowing Library's record to see if it contains something beginning with the 3 characters "PO#" and will print whatever is in that field on the invoice if it does.

The reason for the initial **PO#** in that field is that, conceivably, one could use that field to record any kind of account number, including credit card information, so I wanted to make it certain that this was indeed a **PO number** and not any other kind of identifying number. The Library Account Number field is on the **Charges Tab** of the Library Information form.

Library Information

General Address Comms Charges Groups

452 DEUDMC

Charge Profile Used: 11Lib Pref Payment Method: EFTS

Library Acct Number: PO# 1234567

Name on Account: _____

Exp. Date: _____

Notes: _____

Add/Edit Chg Profile

EFTS payment supported IFM payment supported Add State/Prov Sales Taxes.

Charge for Borrow: \$11.00
 Charge for Loan: \$11.00
 Borrow Fax Surcharge: \$0.00
 Loan Fax Surcharge: \$0.00
 Borrow Rush Surch: \$0.00
 Loan Rush Surcharge: \$0.00
 Borrow Oth Surcharge: \$0.00

Enter Account Number for this Library (50 char's). [To enter a PO Number that will print on a Library Invoice, begin this field with the three characters PO#, followed by the number. QD will print this info on the Invoice to the right of the Library Name.] Press <F3> To Restore last value, <F5> To Clear Field.

OK Apply
 Cancel Delete Library

Enter the PO Number in the format PO#1234567, without adding brackets, which QD will supply at invoice time. You can include spaces or whatever other characters that may be needed, up to 50 characters in length. That number will continue to print on invoices to that library until you come back into the library record and change or delete it.

The number will print, in brackets, e.g., [PO#1234567], at the far right of the second line in that Library's address at the top (which conforms to the Billing Department---usually Library---in the top address field of the Library record).

Invoice

01-Nov-05 to 28-Feb-06

7-Mar-2006

Invoice Number: DEUDMC 0001

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Make Check Payable To: Agoos Medical Library

Terms: NET 30

Beth Israel Deaconess Medical Center
 Agoos Medical Library
 One Deaconess Road
 Boston, MA 02215

Tel: 617.632-8312
 Fax: 617.632-8316
 dyoung3@bidmc.harvard.edu

Our Cost Center: 0108266

Christiana Care Health System / Wilmington Hospital
 Library
 501 West 14th Street / PO Box 1668
 Wilmington, DE 19899-1668

Include copy of Invoice or Inv No. with payment

→ [PO# 1234567]

PO Number appears on the right side of the Library or Dept address line (line 2).

If the library record has nothing in that space, the PO Number will print on the second line, just beneath the Institution Name, in the spot where the Library name would otherwise print.

Invoice
01-Nov-05 to 28-Feb-06

7-Mar-2006

Invoice Number: DEUDMC 0001

Page 1

Make Check Payable To: Agoos Medical Library

Terms: NET 30

Beth Israel Deaconess Medical Center Agoos Medical Library One Deaconess Road Boston, MA 02215	Tel: 617.632-8312 Fax: 617.632-8316 dyoung3@bidmc.harvard.edu
Our Cost Center: 0108266	

Christiana Care Health System / Wilmington Hospita
[PO# 1234567] ←
501 West 14th Street / PO Box 1668
Wilmington, DE 19899-1668

Include copy of Invoice or Inv No. with payment

If there's no Library or Dept Name in the Library record, the PO Number will print in that space,

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:

Holding: Library reports holding vol/yr
Holding: Library owns volume or year

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 in the QuickDOC Help Index under **Journals Owned List** for information on checking and editing your own list.

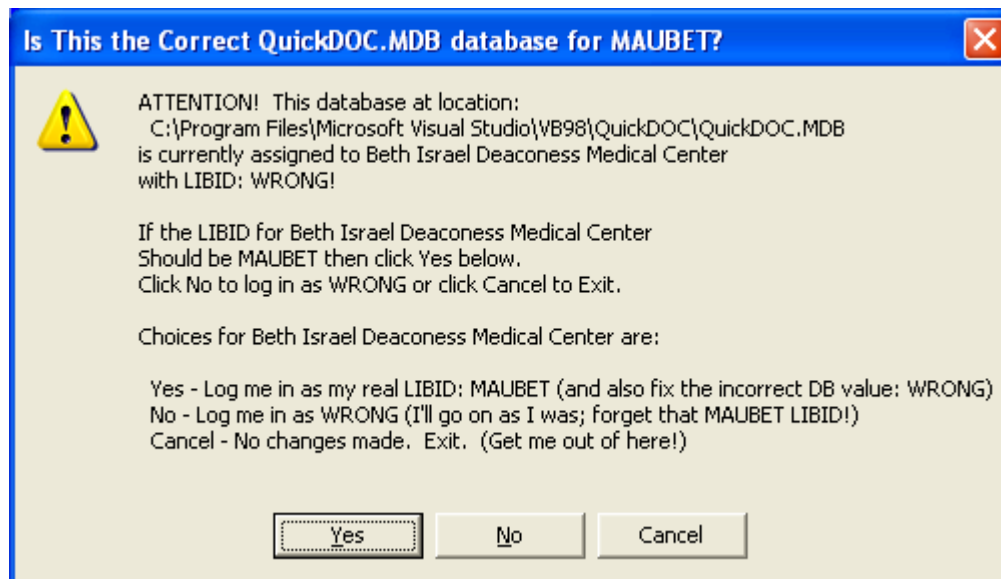
Database

Wrong Database Message on Startup

Earlier 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 to find the database at least once to have this value registered. Current versions keep the LIBID and location also in a file called **MyLibraries.txt** located in the QuickDOC Program folder on the machine where it is being run. 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"
```

It also does a check to be sure that the LIBID that's filed in the QuickDOC.MDB database matches the LIBID in the MyLibraries.txt file. If it doesn't, you'll get a message to that effect:



In the case above, someone has entered the **wrong LIBID** (literally) into the database. Following the instructions in the Message Box, and since the **correct LIBID** for Beth Israel Deaconess is MAUBET, I would click the Yes button here. QuickDOC would then correct the value in the database and continue the login.

In different circumstances---such as when the entry in the database is correct, but the entry in the MyLibraries.txt file is wrong---click No to continue on. You can then just delete the MyLibraries.txt file and let QuickDOC re-write it the next time you start up.