The QuickDOC Program

(Last Rev. 10-Jun-2007)

Download and Installation

Moving QuickDOC from one machine to another

If the machine to which you're moving doesn't have QuickDOC installed (which is the usual case), it's the same as a new installation, with the following caveats:

IMPORTANT: If at all possible, update the current machine to the latest QD Version before making the move. This will ensure that any new install on a new machine doesn't have to deal with an older database type when trying to locate it. If this isn't possible, be sure to point to the correct database location on installation, or see the **Database Version is Different** section in the Database section, below

If you're using QuickDOC now, you can move just the QuickDOC.MDB database to a server (assuming it isn't already located there). Pick a central location that the new computer will also see and make the move from within QuickDOC by clicking setup on the menu bar, and then **Locate QuickDOC DB**. Double-click the drive and folder icons to open them until you get to the central spot, then click the **Locate Here** button (this function also moves the current and previous year's text import backups to the central share).

This will allow you to continue saving data on the old machine right up to the end.

QuickDOC.MDB on the C: drive. If for some reason you can't locate QuickDOC.MDB on a server, and must keep it on your local C: drive (sometimes network vagaries make the shared location too troublesome to continue), you must save a copy of the QuickDOC.MDB database (and perhaps should also save copies of the two import text backup folders---always located just beneath the database location) before taking the old machine out of commission and installing on the new. On the very last day you use the old machine, at the end of the day copy (or move) the following file and folders from your C: drive to a temporary storage spot on the network or burned onto a CD or Zip Drive (the example assumes that QuickDOC was installed in the default C:\Program Files\QuickDOC folder):

C:\ Program Files\QuickDOC\QuickDOC.MDB
C:\ Program Files\QuickDOC\QDBorrow   (and its subfolder \BackImp)
C:\ Program Files\QuickDOC\QDLoan   (and its subfolder \BackImp)

As soon as the new machine is set up, and **just after you install QuickDOC** on the new machine (but before you first start it up), do the following:

1. Copy the **saved QuickDOC.MDB database** into the Program Folder (usually C:\Program Files\QuickDOC).

2. Copy the **two saved import folders** (and their BackImp subfolders) to their proper position just beneath the database folder on the new machine, which should be the same as the paths shown above if you've installed QuickDOC in the default folder. These folders contain all the raw data downloads (and their backups) from DOCLINE sessions.

You don't have to save any of the program files on the old machine. Since both programs MUST be installed from scratch on the new machine (instructions below), there's no point in saving the

old program files. Just the database (the .MDB file) and the two import folders are all that we'll need.

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Of course, if your data files (QuickDOC.MDB database and import text backup folders) are already on the server, then you can dispense with the above. It will still make sense, though, to make backup copies of both the server-based QuickDOC.MDB and the two import subfolders just in case there is some unforseeable infelicity that creates havoc with the installation or initial startup. When dealing with updates or database changes, there is no such thing as being too cautious! Plan for the worst and you'll only be pleasantly surprised.

Download QuickDOC

Latest instructions are always at http://nnlm.gov/quickdoc/InstallQD.html but general instructions are as follows:

If you can take advantage of Web-based installation (some firewalls complain about it) use the WebInstall to start the install or update.

If you get "Authentication Errors" when trying the Web-Based Install, get the complete installation file (the filename is QDSetup.exe, and this file comprises the complete program in a single (LARGE) download file. It actually makes for a less troubled installation in some cases, since many firewalls don't interfere with straight downloads such as this one. It may take a few minutes to get it, though, since it weighs in at over 25MB.

Check the file at http://nnlm.gov/quickdoc/QDFixes.html to see a list of infelicities made felicitous; check under QDNew version (e.g., http://nnlm.gov/quickdoc/QDNew220.pdf) for changes and additions to each update.

(After installation, the latest What's New PDF is also available under Help on the QuickDOC Menu Bar:

along with access to the QuickDOC Manual in PDF format.)

Download the QuickDOC Executable Only

In the case of **Minor upgrades only**, you can download Only the QuickDOC executable to replace your current version. This may make sense for Windows NT Installations, which often require Administrator Accounts to perform installs. If a complete installation or update isn't necessary, you can replace the executable on each machine running QuickDOC in the following manner:

- ❑ Save a copy of the current QuickDOC.exe.   *** ALWAYS a good idea ***
- ❑ Right-click the shortcut and choose the Shortcut Tab to get the full path.
- ❑ Open Windows (or NT) Explorer, drill down to the folder with QuickDOC.exe (shows in right pane)
- ❑ Right-click the QuickDOC.exe filename, choose "Copy"
- ❑ Click the Backup folder in the left pane, which shows contents of the Backup folder in the right window

- ❑ Right-click on any white space in the right pane (Backup folder contents) and click "Paste" (Over-write any earlier version, should there already be a copy there.)
- ❑ Download the latest version of QuickDOC.exe, and
- ❑ Save it to the same folder as the original QuickDOC.exe (overwriting the current version), or save it to an easily located folder and then copy and paste it over the current version.

This method only works for updates where only the exe file has been changed. When in doubt, it always makes sense to do either the Web-Based installation or the Full Installation instead.

When you're asked **where to save the downloaded installation file (QDSetup.exe or QD2x.exe)**, you can save it anywhere, but make sure it's easy to find when you're finished (the desktop is often a good choice). If more than one computer will be running QuickDOC, it makes sense either to save it directly to a server which is accessible by all, or to download to somewhere easy to find on the C: Drive (like the Desktop) and then copy it to the network share.

[As always, this download is made possible by the great people at NNLM/PNR (thanks especially to Michael Boer at the RML for great support on the server side)].

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.

Find the downloaded file on the Desktop, or in the Temp Directory (or wherever you put it) and either move it to a central Server folder, most likely the one where you intend to keep the central QuickDOC database, if you want to run the **installation or update on a number of machines attached to the server**, using the central QuickDOC.MDB database. If you're installing on this one machine only, just install from there.

Installation

Each machine that will be running QuickDOC will need to run the Install.

Even though the data files will be saved on a server, the program itself will be installed and running on a local machine, and that machine MUST have certain files installed and available locally. You'll be choosing a local C: Drive folder first (usually QuickDOC under the Program Files folder, unless you intend to put the data files on a NetWare server which doesn't support long filenames---if that's the case, then you'll want to choose the shortest possible file paths for BOTH the program and the database: use C:\QuickDOC for the program; and something like F:\Apps\QuickDOC for the database files).

Rights to Install

Whatever you decide about the location of the Program files and the Database, if you're doing an initial install (or an upgrade that requires installation of additional support files--- something other than just the overwrite of QuickDOC.exe, as outlined in the instructions for "Minor" upgrades, above), you'll need **Admin rights**, in most cases, if you're installing on **WinNT 4.x or greater**.

Permissions in folders used by QuickDOC

Beyond the need for Administrative rights for installations, you'll also need someone with Admin rights on that machine to be sure that all QuickDOC/QDPortal users have rights in the following folders:

1. The central QuickDOC.MDB folder (and subfolders);

2. The QuickDOC and QDPortal program folders (and subfolders);

3. The C:\QDBorrow folder (and subfolders) on each machine;

4. The C:\QDLoan folder (and subfolders) on each machine

Whatever you decide about the location of the Program files and the Database, if you're doing an initial install (or an upgrade that requires installation of additional support files---something other than just the overwrite of QuickDOC.exe, as outlined in the instructions

Memory Requirements – 64MB+ RAM Memory Installed

QuickDOC may run with 32MB RAM memory, but 64MB RAM is the practical minimum, and the best environment will have 128MB available for forms and current data.

Operating System Requirements

QuickDOC will run on any 32-bit Windows system, but there are some caveats based on known Win32 OS limitations:

Win95: Versions earlier than 4.00.95b may have some problems.

WinNT: QuickDOC will not load if the **NT Service Pack 5 or greater** is not loaded.

Internet Explorer Version Requirements – IE6 or greater

QuickDOC (or QDPortal in versions where the Web Browser is outside of the Main Program, which is the case in anything less than QuickDOC 2.0) must use Internet Explorer Version 6.x or greater.

MDAC (Microsoft Data Access Components) Requirements

QuickDOC requires **MDAC 2.7 Refresh** (installed with WinXP and later) and may therefore need an MDAC installation on first install or update. Once MDAC 2.7 is installed, it can't be uninstalled, and the operating system will continue with that version whether QuickDOC is uninstalled or not. Windows XP SP2 uses MDAC 2.8, so users with XP Service Pack 2 won't see any new MDAC components installed.

Information on MDAC versions is at:
http://msdn.microsoft.com/data/downloads/updates/default.aspx

This site also provides a download of the Component Checker program (on page http://msdn.microsoft.com/data/mdac/downloads/default.aspx as of 3/2006), which does an analysis of your current MDAC installation and can be used to diagnose errors in the installation. As described at the Microsoft web site:

The **Component Checker** tool is designed to help you determine installed version information and diagnose installation issues with the Microsoft Data Access Components (MDAC). Component Checker runs on the following operating systems: Windows 98, Windows NT 4.0, Windows 2000 and Windows XP.

MDAC is installed with numerous Microsoft products and also can be redistributed using the redistribution program (mdac_typ.exe) accessible through the links on the rest of this page.

Component Checker is a customizable tool that performs the following tasks:

- Identifies the current MDAC installation on a computer.

- Creates a series of reports about the files identified for the current MDAC installation.

- This version of the Component Checker has a dependency on MSXML2.dll. Users who do not have this dll on their machine will be prompted to visit www.microsoft.com/downloads to install MSXML 3.0 SP4 on their machines.

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Executing the Installation Program

Once you've decided where your QuickDOC folders will be located, find the **QDSetup.exe** (or **QD21.exe** for Web-Based installs) file (either on your Desktop, or in your default Download folder, or at the central network folder where you saved or moved it) and execute it (a double-click will do 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 is QDSetup.exe.) Once you've found it, double-click on it to begin.]

Long Filenames.

If you're storing the QuickDOC.MDB database on a server, and it's a NetWare server, make sure it can handle Long Filenames. This isn't a concern with NT Servers, or Windows versions after NT 3.5.

Otherwise, every attempt has been made to make to permit the QuickDOC.MDB database to function on a Long-Filename-Challenged server, but no guarantees are possible. Better to use an NT Server or greater, or to store the QuickDOC.MDB database locally, if only one machine will be using it, in the Program (C:\Program Files\QuickDOC) Folder.

QuickDOC.MDB on a Server

If you're not concerned with the long filenames problem (you're using NT or a version of NetWare with the proper patch), you can take the long view and establish the QuickDOC.MDB database on a central server. This is usually the best approach. Advantages here are obvious: regular backups; easy installations on new workstations; etc.

QuickDOC Program Files Installation

Put the QuickDOC 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 QuickDOC**, 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 (it won't delete any database files, though, just in case you find you really do want that data back).

MDAC

Because this installation also installs the latest **Microsoft Data Access Components**, unless you happen to be running Windows XP, or you've installed MDAC for some other reason, you'll notice that you're prompted to reboot once the MDAC files are installed. This upgrade must be completed and Registry files updated, before any other files are installed, so you'll

probably have to reboot at least twice during the first installation, although this will only happen the first time.

Installation Steps

1st Step: Download the Update File.

```
The latest QD Update Information is always in the QuickDOC Upgrade
document: Links for Update Files are always at this address.
```
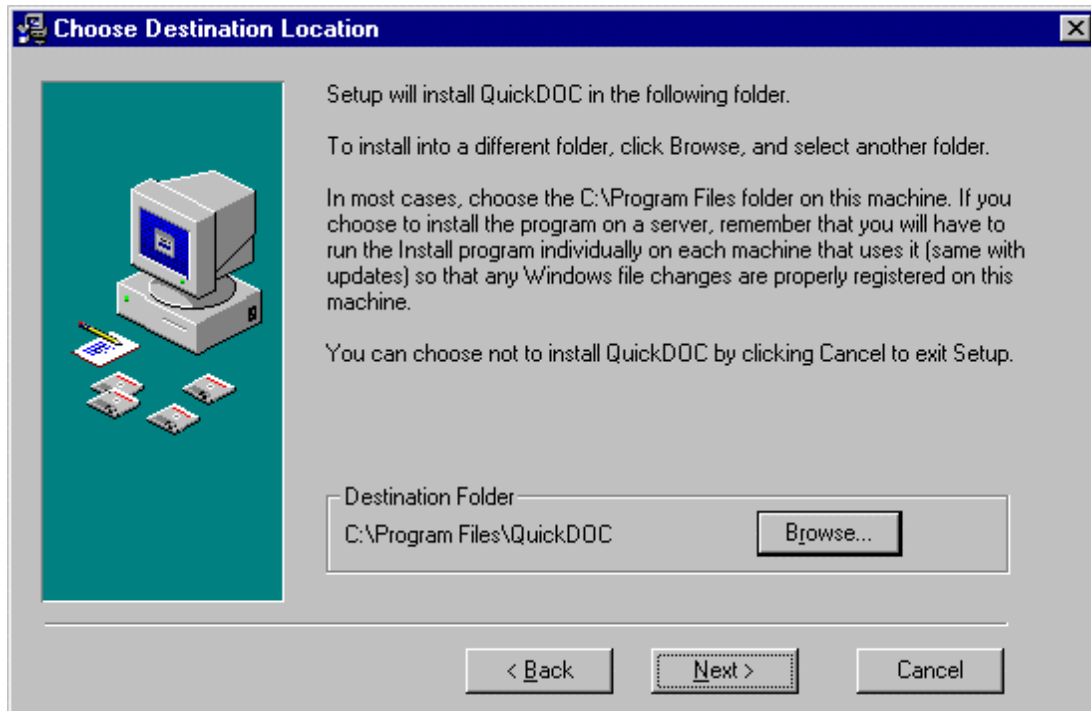http://nnlm.gov/quickdoc/InstallQD.html

QuickDOC Full (NoWeb) Install

Click on the complete installation file   link (or the one to the left, if it's highlighted) to install the upgrade (or new version) from one download. Save the QDSetup.exe file to a central source (if there are multiple machines using QD, run the QDSetup.exe from EACH machine to be sure that all files on the local machine are properly updated) or to the Desktop (or other easily located folder, so you can be sure to find it when you need it!) on each machine where you want to run the upgrade (or install).

QuickDOC Web-based Install

Click on the Web Install File (QD21.exe) at   http://nnlm.gov/quickdoc/QDManual/QD21.exe. Instead of the full Local Install (QDSetup.exe) and Save it to the Desktop. The best place for either the Web Install file (QD2x.exe) or the full Install file (QDSetup.exe) is the Desktop.

2nd Step: Run the Installation Program.

Click on either the **QDSetup.exe** (Full download) or **QD2x.exe** (Web-based install) to begin running the Installation Program. You can mostly take the defaults on each screen, but pay particular attention to the "**Destination Folder**" you are offered at the beginning of the install:

Choose Destination Location ☒

Setup will install QuickDOC in the following folder.

To install into a different folder, click Browse, and select another folder.

In most cases, choose the C:\Program Files folder on this machine. If you choose to install the program on a server, remember that you will have to run the Install program individually on each machine that uses it (same with updates) so that any Windows file changes are properly registered on this machine.

You can choose not to install QuickDOC by clicking Cancel to exit Setup.

Destination Folder
C:\Program Files\QuickDOC   Browse...

< Back   Next >   Cancel

Always make sure that the Destination Folder show on this screen is the folder where you want the program to be located. The **default program folder on first installation** will be the C:\Program Files\QuickDOC folder pictured above.

Watch the Destination Folder on Updates, especially, to make sure that update installations are going to the same folder that the original installation was lodged in. It doesn't happen often, but occasionally the Install Program may get confused if an earlier installation was made on a different Drive. A common indication of this confusion is when the executable filename, QuickDOC.exe is somehow substituted for the folder name (sometimes you'll see an **UNWISE.EXE** appended at the end, for some reason; this is also a non-starter and needs to be fixed). This setup will obviously cause an error and must be fixed. Use the **Installation Program's Browse Button** to **Select Destination Directory**.
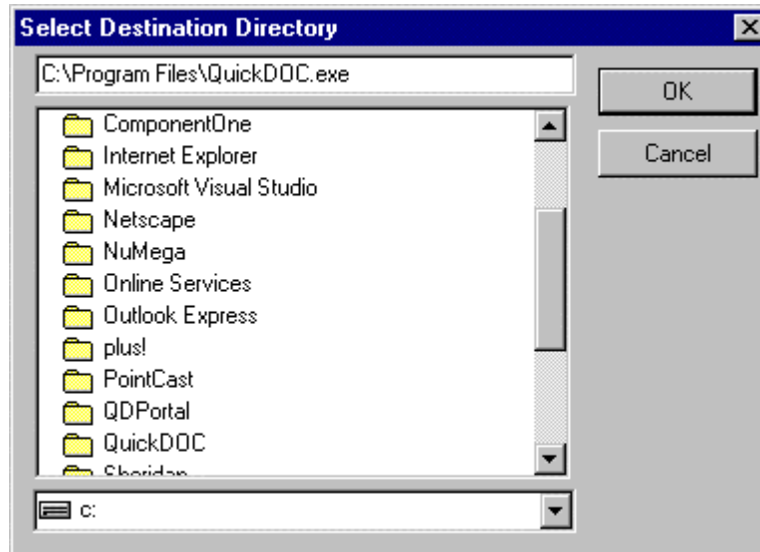
As you can see above, QuickDOC.exe is not a likely folder name. You can edit this item directly, by clicking at the end of that top line and backspacing over everything back to the C at the end of QuickDOC. The box will now look like this:
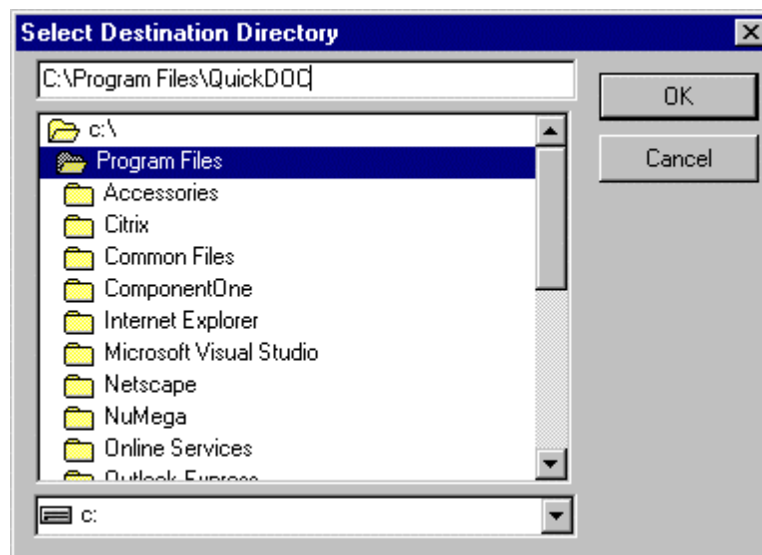
Click Ok and proceed with the rest of the Install. The other defaults rarely cause any trouble, so it's best to click Next until the installation is complete. Depending upon the machine and Operating system, the process of "**Updating System Components**" may take some time, so be patient and allow the process to be completed.

When the install is finished, you will probably be prompted to reboot again, depending upon whether files needed to be updated

Installing on Machines without a C: Drive.

QuickDOC will check at startup to see whether the machine on which it is running has a C: drive (QDPortal 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.

Preparing for First Use

You'll now see a new QuickDOC Shortcut on the Desktop. It's time to **decide where the QuickDOC.MDB Database will be located**.

Locate the QuickDOC.MDB Database

5. In general, **if you think that more than one computer will be using the files, it's best to locate the data files on a network drive**. Make sure that all potential users have all rights, including Create, Delete and Modify Files, Folders and subdirectories in the folder you choose.

6. If **only this machine will be running QuickDOC**, the database will be located, by default, in same folder where the QuickDOC.exe file is located. You can always change the location later using the **Locate QuickDOC DB choice under Setup** on the QuickDOC Menu Bar.
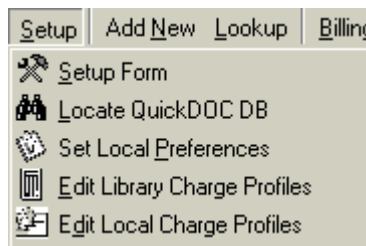

7. The Locate QuickDOC DB choice leads to the **QuickDOC.MDB Database Operations Form**, which is used to move the QuickDOC.MDB database, as well as to identify the location on first installation (see below).

## Setup QuickDOC.MDB Database on first Installation

The first time you start up QuickDOC, you'll first be asked to determine your database location. This will also occur the first time each new user or machine performs the install, though in those cases, it's just a matter of pointing to an existing database rather than deciding where it goes in the first place.

The Message Box will inform you that:
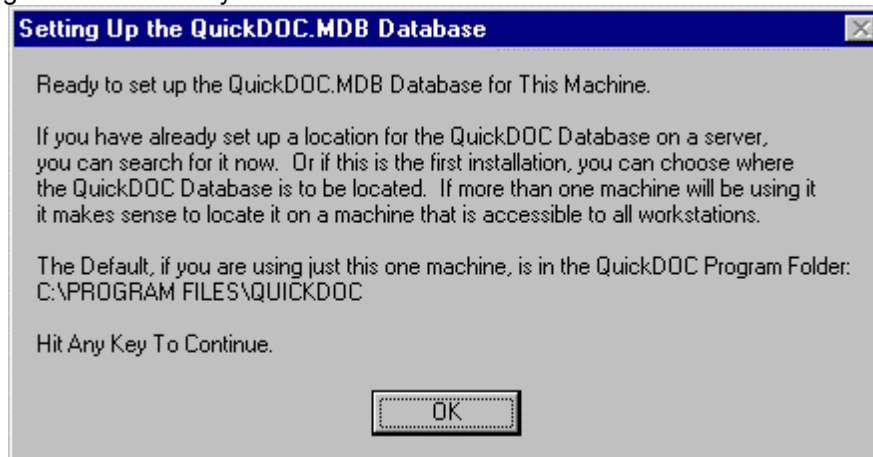
1. If you've already set up a db on a server, you can search for it;

2. If this is a 1st installation, you can choose a server location or stay local;

3. The default will be the folder where the program has been installed.

Hit any key, or click the OK button, and you'll get a chance to select the database location, using the familiar Windows Drive and Directory List Boxes. If you already have a central database location, then use the List Boxes to point to the site of the database for this installation. This will ensure that all machines are saving data to the same database.
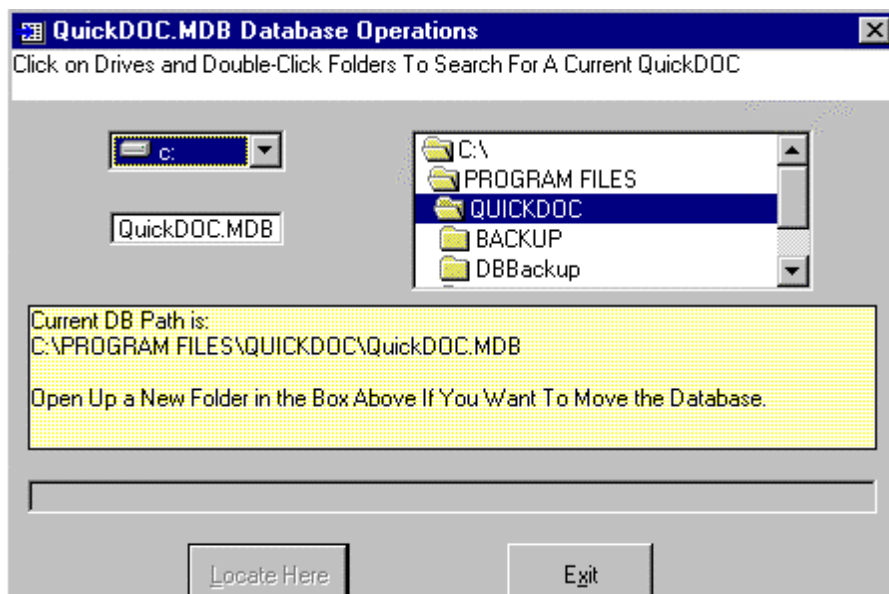
The form will open with the **default C:\Program Files\QuickDOC\QuickDOC.MDB location**, as is the case above. The **Locate Here** Button will be enabled, so if you're satisfied with the default location, just click **Locate Here** and then **Exit**. If you want to locate it at a previously created central server location, click the arrow to the right of the c: in the **Drive Box**, above, to expose the list, then double-click the Drive icon next to the letter you want. This will expose the list of folders for that Drive in the **Directory Box** to the right. Open the necessary folders to drill down to the one you want by double-clicking on the folder icon until it opens. If you're installing on a **second machine on the network**, when you've opened the folder where you want to locate the database, you'll see "**FOUND ONE HERE**" in the yellow box, indicating that a QuickDOC.MDB database already exists.

When searching for the central data file, each time you double-click on a folder where a QuickDOC.MDB file exists, a message will appear stating that a QuickDOC.MDB file was **FOUND HERE**, along with the file information: **File Size; Last Accessed**, etc., and the "**Locate Here**" button will be enabled.

If this is the first locate operation, just click **Locate Here** when you've found the proper folder and then **Exit**.

The Database is an **Access 2000 style database** called **QuickDOC.MDB**. Although you don't need Access 2000 installed on your machine, if it is installed it can be used to format your own local reports, etc. If you want to work with the database tables directly, it's usually wise to work on a copy of the database rather than the real thing.

QuickDOC Updates: Be sure no one else is using the db during an update!

After installing any QuickDOC Update, the first time you start up the program it will check to see whether this update makes any change to the database structure, or does any batch updating of database records (most updates do one or both). If so, it will go ahead and make the changes to the database. This only occurs on the first machine to start up with the latest update, since any machines updated after that one will, of course, note that the changes have already been made to the shared database and move on accordingly.

> **To prevent damage to the QuickDOC.MDB database during ANY update, it is always good practice to be sure that the machine being updated (and starting up just after the installation process is complete) is the only one logged in to the database at that time**.

During the update process, the program will check before beginning the database update and let you know if more than one current user is logged in:
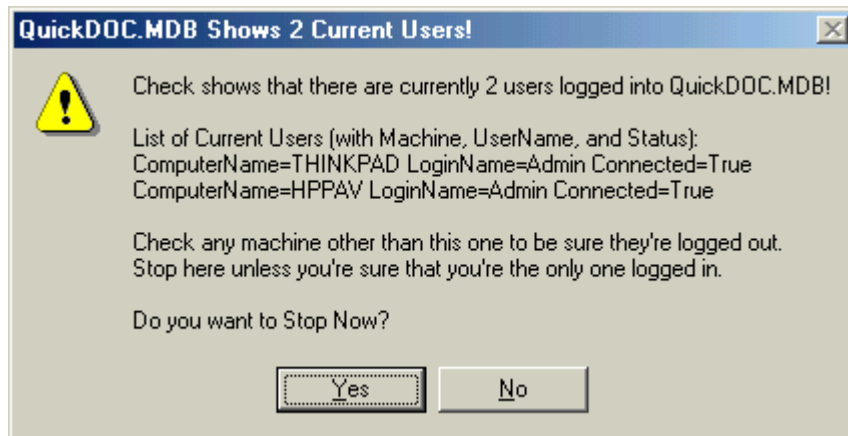
In the case above there are two users currently logged in. Because all users currently have the **UserName Admin**, only the **machine name** is useful in identifying who else may be logged in. In the case above, since I know that I am using the machine with the **ComputerName HPPAV**, I should check to see who is using the machine **THINKPAD** and ask them to log out of QuickDOC before proceeding.

In some cases, particularly where the second user never properly logged out of QuickDOC (say the machine froze up, for whatever reason, and the user never bothered to log in and out of QuickDOC after rebooting), you may see a second user listed even though they are not actually logged in at the moment. In such a case you may safely continue on, but it's always smart to check first and be sure that there is no other user currently reading and writing to the database, to minimize the chance of database corruption.

Memory Problems on machines with less than 64MB RAM

Because there are some forms with a large number of controls, boxes and other data, computers with only the minimal 32MB of memory will probably have problems during the course of operation. To be safe at least 64MB of RAM should be installed; 128MB will improve performance that much more. On the **QuickDOC Splash Screen at Startup** there will be a notice of **Memory Resources Available**. If those resources are at the low end, a more elaborate notice is given:
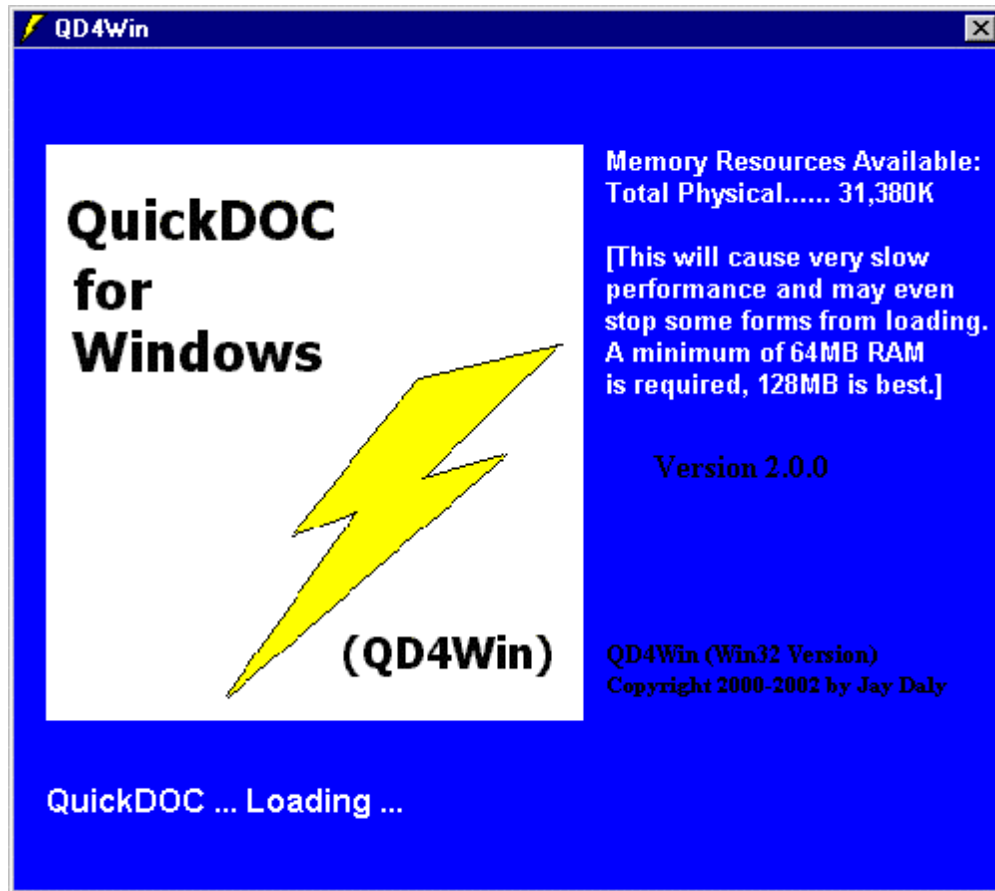
If you see a message like the above on startup, then it's time to think about installing a memory upgrade. You'll avoid problems and also experience a marked increase in performance.

Database Installation Troubleshooting

Problem Opening Version Table

When you see "**Problem Opening Version Table**" as QuickDOC starts up, in most cases it means that the database isn't being found where the program thinks it should be (it can also occur if someone has locked down the database for some maintenance operation, but this will rarely be the case, and if it happens just after downloading an update, then it's probably a location problem).

Each machine running QuickDOC keeps track of where the database is located by checking for a file called **MyLibraries.txt**, which should be located in the QuickDOC Program folder on the machine where it is being run (a backup copy of the last location accessed is also 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"

If it doesn't find the db there, it next looks in the program folder (typically, C:\Program Files\QuickDOC) to see if it's there.

If it finds one there, it will go ahead and use that one, but if not, you'll get that error. In general, this could occur if the database was moved outside of QuickDOC (rather than with the "Locate QuickDOC DB" form) and consequently the Registry entry no longer pointed to the correct location.

Try this as a way to recover. First, close out of QuickDOC and use Windows Explorer (or NT Explorer) to check whether the QuickDOC.MDB database file is in the folder you expect it to be in (the recommendation is either the QuickDOC Program folder, if you're using only one machine or some file server location if you're using more than one). If it is, and if the size of the file is greater than 4720K or so and it was recently accessed, then it's probably the one.

Check for a MyLibraries.txt file in the QuickDOC Program folder. If it doesn't point where you think it should, delete that file.

Check the **Database Registry Entry** to see what the last location entered there was:

> 1. Click the Start Button, then "Run."
>
> 2. Type: regedit in the run box and click OK.
>
> 3. When the Registry Editor comes up, click the + sign next to the following:
>
> > HKEY_CURRENT_USER, then
> >
> > Software, then
> >
> > VB and VBA Programs, then
> >
> > QuickDOC
>
> 4. Under QuickDOC, you'll see a Database folder; click once and its values will show up in the right pane. The path next to "Location" is where the program last found the db. If this is the correct location, just leave it alone; QuickDOC will pick it up on the next startup and use it to re-write the MyLibraries.txt file.

If this Registry location also isn't correct, delete the entire "Database" key, so that QuickDOC sets up the location anew. Right-click on the Database folder icon and choose "Delete this Key." Once the key is deleted, choose Registry from the menu bar, then Exit.

When next you start up QuickDOC, it should announce that you'll need to identify the Database location, etc. If you're not brought directly to the "Database Operations" window, then...

Locate the DB Again

Click "**Setup**" on the menu bar, then "**Locate QuickDOC DB**." Find the Drive and directory where you want the db to be located by clicking on the proper drive in the drive box, then double-clicking on folder icons until the one you want is highlighted in the directory list box. Click the **Locate Here** button and wait until the Exit button is highlighted (will happen nearly at once if there's no QuickDOC.MDB in the location already). Click **Exit**, then exit all the way out of QD and come right back in (just to be sure the Registry is rewritten).

Use the same **Setup** and **Locate QuickDOC DB** choices on each machine to make sure that all machines are pointing to the same database. **Current database location is displayed on the Status Bar** of the main blue QuickDOC screen (unless it's hidden by the Task Bar) and also in the yellow box that displays in the middle of the "QuickDOC.MDB Database Operations" form when it first appears (after Setup - Locate QuickDOC DB choices).

This is a bit complicated, but will get the job done. Once the db is established, don't move it except by using the form mentioned above.

Windows NT Workstation Installations:

Thanks to Anne Comeaux at UTHSC San Antonio posted a message on QuickDOC-L regarding NT4.0 Installs for QDPortal. This also applies to QuickDOC (just substitute QuickDOC for QDPortal, below):

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**. Also, certain values are kept in the Registry under the "Current User" Key, so each user may have to log in once to write values to his or her username. If you are doing an Update, not an original Install, and are brought to a blank Setup Screen right after starting up QuickDOC, then check to be sure you're logging in under the same username as the previous setup. Have a look at the Registry Settings under your username as described **under Problem Opening Version Table**, above.

Registry Settings Made by QuickDOC

The following Registry Settings are made by QuickDOC, on first startup in some cases, and as needed in others. All the settings are in

   HKEY_CURRENT_USER\Software\VB and VBA Program Settings\QuickDOC

QuickDOC Registry Keys:

\Database\DataSource - holds the full DataSource name for ADO Connection String

\Database\Location - holds the full path to the last QuickDOC.MDB database used

\Database\Provider - holds the full Provider name for ADO Connection String

\Database\ProviderString - equals "Jet" for MS Access 2000

\Database\Security - holds the full Security setting for ADO Connection String

 [most of the entries under …\Identity are now backups of primary data kept in the tblLocals Table of the QuickDOC.MDB database.]

\Initialization\ErrorLog - identifies type of errors being logged (full or abbreviated)

\Initialization\Initialized - set to "true" after first running

\Initialization\OldDOSDir - identifies old DOS QD Directory, if any.

\NLM\DOCLINE_HTTP - DOCLINE URL

\NLM\LIBID - LIBID of this Library, backup of tblLocals value.

\NLM\Password - DOCLINE Login Password, backup of tblLocals value.

\NLM\UserID - DOCLINE Login User ID, backup of tblLocals value.

\Settings - holds the last settings of the Main Program Form to restore

\Version\CurrentVer   - holds the current version of QD to compare with DB version.

Installing on NetWare 3.12 or other "long filename challenged" servers

As mentioned above, if you're using a version of NetWare that doesn't support long filenames (you'll know if you ever tried to install a Windows Program on the Server, probably, if you are), you may run into trouble, even if you keep all your files on the C: drive (which will happen if you install from a QDSetup.exe that happens to be on the network). If this is the case, use the shortest possible file paths. We've been successful with **C:\QuickDOC** for the Program Files and **F:\Apps\QuickDOC** for the DB files.

Running Multiple QuickDOC.MDB Databases from One Location

We are two hospitals in a system network. We have a QD subscription at each library. Our IS department would like to set up QD on the network with two folders, one for [Library A] and one for [Library B]. They then would like to have both available on the pc's at each site so if someone is sick or on vacation the other library could pull requests etc..

It is important for us to maintain both copies of QD for statistics and funding. Is there anyway this can be done?

I'm planning to make this kind of setup easier at some point (probably version 2.2.0), but for now it's a bit difficult to do both libraries on one machine.

Latest Changes PDF file

A PDF document detailing the latest changes made from the previous QuickDOC version is always available from the QuickDOC Menu Bar, under Help.

The QuickDOC Latest Changes document is at C:\Program Files\QuickDOC**QDLatest.pdf**.

Setup

Setup Program

After locating the database files, on your first running of the QuickDOC Program you'll be brought immediately to the **General Setup Screen**. (If you ever need to change any information later, just choose "General Setup" under the "Setup" Choice on the Menu Bar.)

General Setup

General Data values are entered on the Setup form. Help for data entry is in the Blue box at the bottom of the form.

Press <ENTER> or <TAB> to move from question to question. Click the Finished button when data entry is completed. The first group of boxes may already be filled in if you've been using QDPortal. 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**.

You **New DOCLINE LIBID** is usually in the format State/Province (2 letters), Country (1 letter), SERHOLD ID (3 letters), e.g., MAUBET (Beth Israel Deaconess) or ONCCIS (CISTI).

The **Default for # Days** box is to have the QDPortal program calculate a **Default NNA date**, which can then be applied to any request by clicking on the NNA Date button. (Not available for IE4.)

The current **DOCLINE HTTP address** is the default. Preferred default value is now:

wwwcf.nlm.nih.gov/docline/index.cfm

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 in QDPortal when you want to add this default Routing Prefix. (Not available for IE4.)

Institution Name, etc., are fairly straightforward.

Default Charge for Import From QDPortal. Enter here your typical charge for the Items that will be automatically imported from the files that were saved (and will continue to be saved) in QDPortal. Choose the most common charge, to minimize editing later (which can be done globally, once the files are imported, to speed the process).

All filled requests will be assigned this charge in the initial import process. Later, you can assign a charge for each Borrower, and that charge will be applied to forthcoming imports, rather than the default charge. In the final QD4Win there are Charge Profiles that will dynamically assign charges, depending upon a variety of factors.

If you normally don't charge, enter 0.00 here. It will then be fairly easy to search by Library for those you do charge and globally change the charge to your current fee.

Locate QuickDOC.MDB
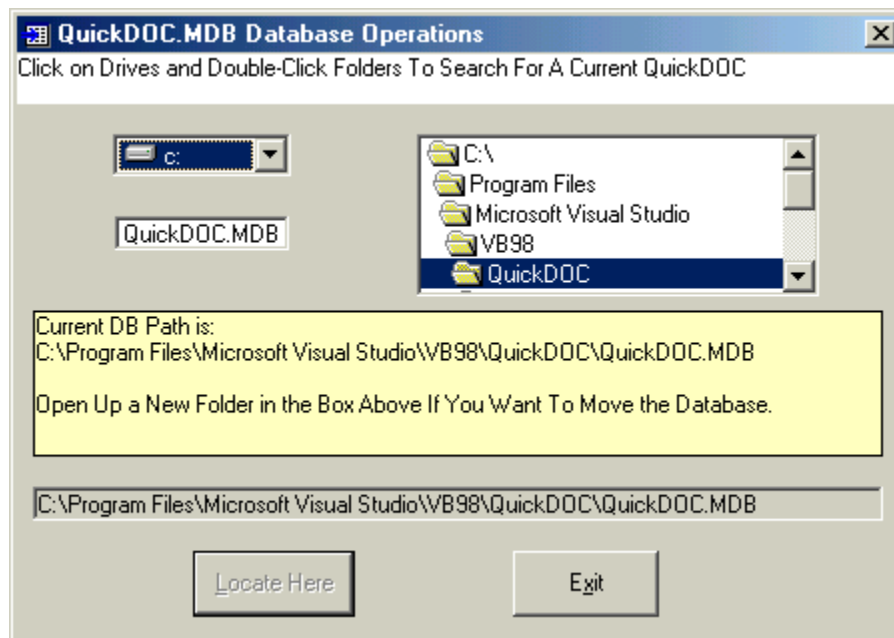
If you're installing on a second machine on the network, use the Drive box to find the Network location, and then the Directory box to locate the centralized QuickDOC.MDB file. When searching for the central data file, each time you double-click on a folder where a QuickDOC.MDB file exists, a message will appear stating that a **QuickDOC.MDB** file was **FOUND HERE**, along with the file information: File Size; Last Accessed, etc., and the "Locate Here" button will be enabled.

Database Version is Different

When performing an installation on a new machine with an updated version that is **greater than the current Database Version**, and if, for whatever reason, you don't get a chance to point to the correct database at the time of installation, you'll get a message box with the warning **Database Version is Different** when you try to move it to the desired location.

If this occurs, follow the instructions in the message box, which will, in effect, first move the data from the database with the earlier version notation to the current (generally minimal) installation database, and then clear a space on the server where you can move it (newly updated) back to where it was.

Steps are:

1. Use the File Menu, Import choice to choose External QuickDOC Data, and click on the folder with the old version database.

2. When you've found it, click **Import Now**. This moves the old data to the new database format.

3. Use Windows Explorer to delete (or rename, just to be safe) the old QuickDOC.MDB.

4. Use the Setup Menu, Locate QuickDOC DB, to move the database location once again to the desired central location. Since there won't now be a file to update, this operation will be very quick and the database should now show in the Status Bar in the new location.

This situation can be prevented by using this strategy: **First update all computers currently running QuickDOC before installing any newer version on a new computer**.

Getting Started with QuickDOC

The Splash Screen

Each time you start the QuickDOC Program, you see the Splash Screen display while the program is being loaded and various database tables are being checked.
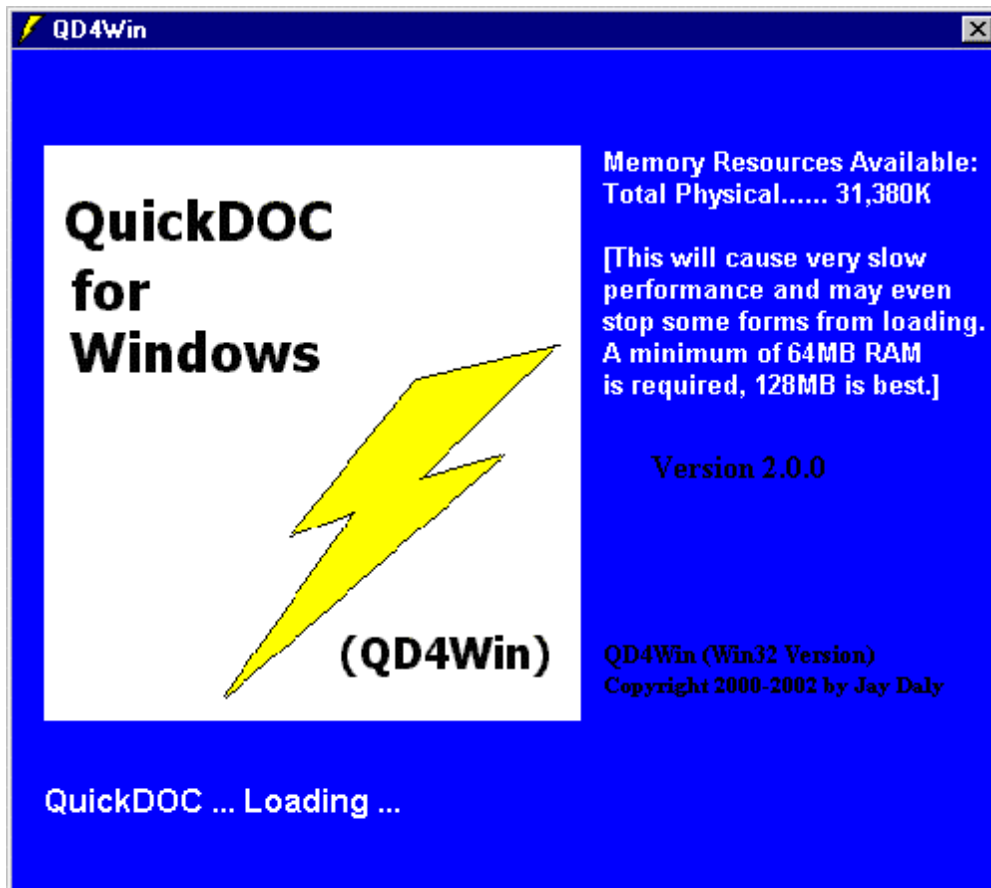
RAM Memory Requirements

As illustrated above, **insufficient RAM memory is anything under 32MB.** A setup under those conditions will undoubtedly cause problems, including the inability of some QuickDOC forms to load into memory. You'll get an error message when the form tries to load, and the program will be non-functional in any real sense of the word.

If your display shows the **bare minimum RAM memory of 32MB**, you'll also get the message above. In your case, you'll probably be able to load all the forms, etc., but because Windows will be doing a lot of swapping between disk memory and RAM memory, program execution will likely be slow. You'll find a memory upgrade to 128MB RAM will make your day run much smoother.

The **minimum RAM memory for proper program execution is 64MB**; the **recommended RAM memory for best performance is 128MB** or greater.

Disk Space Requirements

The QuickDOC.MDB database will grow or shrink based on your level of activity (it can be compressed periodically using Access 2000's Compress Utility) but it will be wise to set aside 25MB for database expansion. The database is usually kept on a server so that it can be backed up periodically, although it can also be kept on the local machine, in the same folder as the program files.

The QuickDOC Program files should be installed on each machine and, with the Help file and other PDF documentation, you will probably need from 50MB to 100MB of free disk space.

The Main Screen

The Main (Blue) screen contains the work area along with the Menu Bar, Tool Bar buttons and Status Bar.
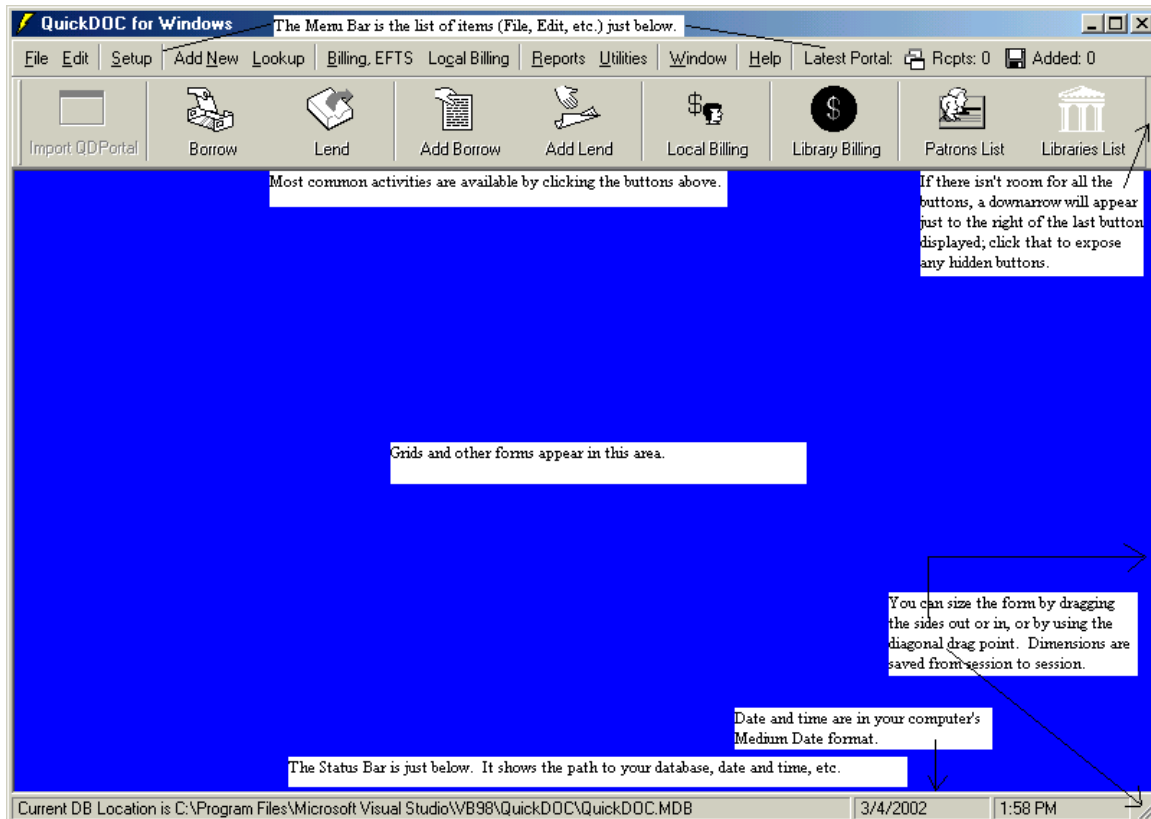
Menu Bar.

The Menu bar provides access to all of the program's forms and activities. Even the forms normally accessed by clicking a button on the Tool Bar are also accessible through a menu choice. Choices are:

File Menu Choices

Close File   (Used when editing **EFTS File Uploads**, etc.)

Save File   (Used when editing **EFTS File Uploads**, etc.)

Import   (Shows Import submenu --- See **Imports and Exports**)

Export   (Shows Export submenu --- See **Imports and Exports**)

PageSetup   (Used To `setup the Printer` for Grid Forms)

ResetPrinter   (To `Reset the Printer` after printer change)

Print Preview   (To `Preview Print jobs` on Grid Forms)

Print   (Used To `Print the current job`)

Exit QuickDOC(`Exit` the program)

Edit Menu Choices

Undo Delete   (Not currently implemented)

Cut   (Cut selected text)

Copy   (Copy selected text)

Paste   (Paste text copied to Clipboard)

Setup Menu Choices

Setup Form   (The Setup Program form)

Locate QuickDOC DB   (Find or Move the Database)

Set Local Preferences   (Setup for Local Options)

Edit Library Charge Profiles   (**Library Charge profiles**)

Edit Local Charge Profiles   (**Patron/Dept Charge profiles**)

Add New Menu Choices

Borrow   (Add a Borrowed Item)

Lend   (Add a Lend Item)

Dept   (Add a Department)

Journal Title   (Add a Journal Title)

Lend Credit   (Credits for EFTS items Uploaded in error)

Patron   (Add a Patron)

Lookup Menu Choices

Depts   (Shows the Departments List)

Items Borrowed   (Shows the Borrow Items Grid)

Items Loaned   (Shows the Lend Items Grid)

Journal Title   (Shows the Edit Journals Form)

Libraries   (Shows the Libraries List)

Patrons   (Shows the Patrons List)

Billing, EFTS Menu Choices

Make New EFTS File   (Creates a new EFTS Upload file)

Open Existing EFTS File   (Shows a list of files on disk)

Invoices, Print   (Print a batch of Invoices)

Trial Invoices, Print   (Print a Trial batch)

Invoices Outstanding (List of unpaid Invoices)

Payments   (Shows the Library Payments form)

Payments as Borrower   (Shows the Payments to Lenders form)

Local Billing Menu Choices

Print Patron Bills   (Prints Invoices by Patron Charge)

Print Patron Copy Service Bills   (Prints Patron Copy Service Invoices)

Patron Trial Invoices   (Prints a Trial batch)

Patron Invoices Outstanding   (List of outstanding Patron Invoices)

Print Dept Bills   (Prints Invoices by Dept Charge)

Print Dept Copy Service Bills (Prints Dept Copy Service Invoices)

Dept Trial Invoices   (Prints a Trial batch)

Print Cost Center Report   (Prints Cost Center Invoice)

Copy Service Cost Center Report   (Prints Copy Service Cost Ctr Invoices)

Dept Invoices Outstanding   (List of outstanding Dept Invoices)

Payments   (Shows the Local Payments form)

Reports Menu Choices

Borrowed Items   (Shows the form for Borrow Reports)

Loaned Items   (Shows the form for Lend Reports)

Utilities Menu Choices

Borrow Log Files   (Lists QDPortal Borrow Import Log files)

Loan Log Files   (Lists QDPortal Loan Import Log files)

Orphan Update List   (Shows when Lend Updates not found)

ResetPrinter   (Used To Reset the Printer after printer change)

Window Menu Choices

Tile Horizontally   (Tile more than 1 child window)

Tile Vertically   (Tile more than 1 child window)

Cascade   (Arrange open windows in cascade)

Arrange Icons   (Not used at present)

Help Menu Choices

About QuickDOC   (Shows version and system information)

If you click About QuickDOC from the Help menu you'll see a form with information about the **current version of QuickDOC**, as well as a button to provide access to information about your **current system information**.
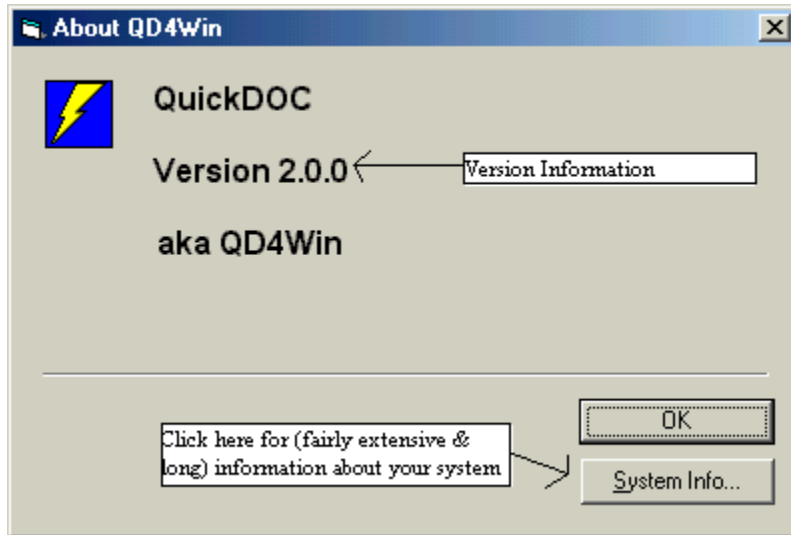
The **version number** is in bold, just under the program name. **System information** is available with the **System Info Button**, which displays system information from Windows. This information is retrieved in a variety of ways, depending upon your operating system (in most cases it will run a file called **MSInfo32.exe**, which is the **Microsoft System Information** program). On some systems this program may take a considerable amount of time to gather up all the information from your system, so it's not something you'll want to run very often.

QuickDOC Help   (QD documentation & Help screens)

The QuickDOC Help choice on the Help menu exposes the **QuickDOC.hlp file**, which is a typical Windows Help System. You'll first get the blank Help window, from which choices can be made:
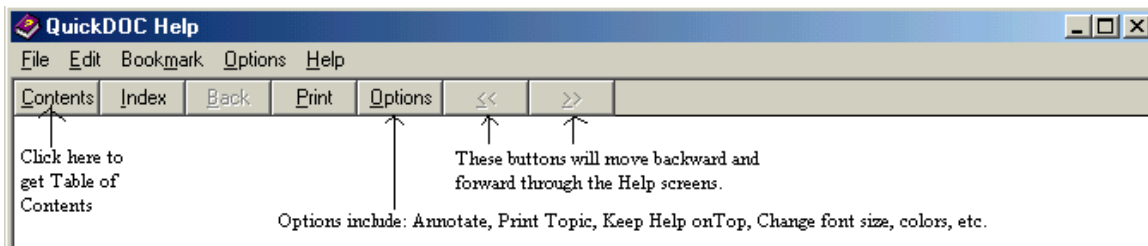
In most cases you'll choose the **Help Contents** button, which will show the **Help Contents Menu**, which will look something like this:
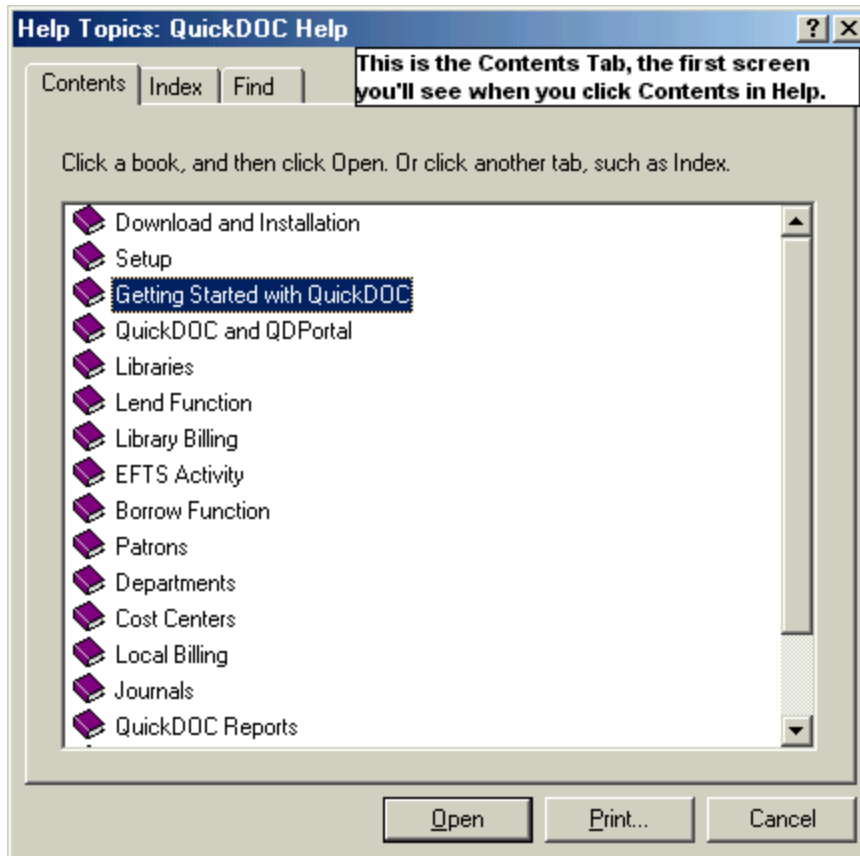
The Index and Find Tabs lead to typical search-by-word Help utilities. Double-click any of the Book Icons to open that book and expose any topics contained therein.

You can **Print a Help Topic** by clicking the Print button (clicking Print above would print the entire "Download and Installation" topic). In most cases, rather than printing an entire topic, you can print a section at a time by highlighting that section before clicking the Print button.

There are also Index and Find choices for searching the Help File.

Help Topics: QuickDOC Help

Contents | Index | Find

Clicking the Index Tab brings up major topics.

1 Type the first few letters of the word you're looking for.

2 Click the index entry you want, and then click Display.

Add Borrow Button
Add Borrow Item Form
Add Departments
Add Journals
Add Lend Button
Add Lend Item Form
Add Libraries
Add New Menu Choices
Add Patrons
Add/Edit Cost Center Form
Added Borrow Request Number: 44296
Adding a Domain Name for Dept
Adding a Domain Name for Patron
Adding Journal Titles
Article
Assigning new Dept Cost Center to All Patrons in Dept
Assigning new Patron Cost Center to Backfile Records

Display | Print... | Cancel

The **Help Index** button will show the **Help Major Topics List**, which looks something like the above:
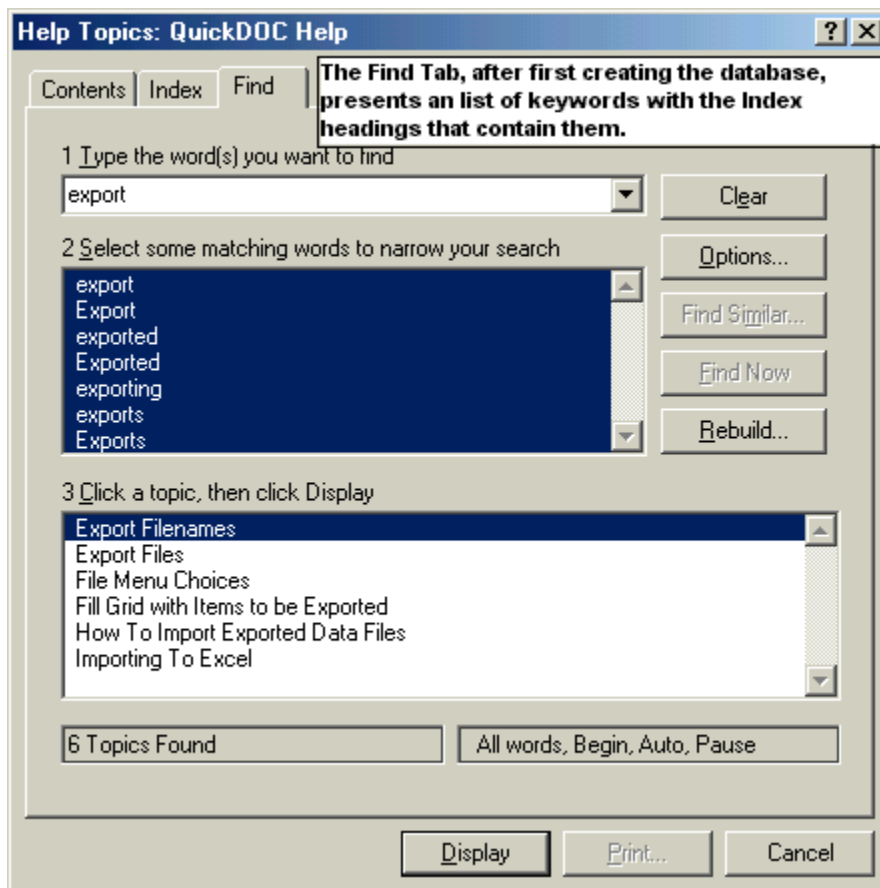
Clicking the **Help Find Button** will, after generating the database on the first time you choose it, display a list of keywords with the Index Headings under which they are found, as above.

QD Manual (PDF)   (Loads the QuickDOC Manual in Adobe Acrobat Reader)

This choice allows access from within the program to the **complete QuickDOC Manual in PDF format**. Clicking this choice will launch **Adobe Acrobat Reader** (if you have the program present on that machine) and load the **QuickDOC.pdf file**.

Although the regular QuickDOC Help file (also available from the Help Menu) contains most of the same information in a **Windows Help format**, opening the PDF version of the Manual may be useful for printing a selection of pages, or for reading a section continuously, rather than in separate Help file screens.

If the QuickDOC.pdf file doesn't exist in your QuickDOC Program folder then this selection will be grayed out.

Latest Version Info (PDF)   (Loads the What's New file in Adobe Acrobat Reader)

This choice allows access from within the program to the "**What's New?**" file describing changes and additions in the latest program update. Clicking this choice will launch Adobe Acrobat Reader (if you have the program present on that machine) and load the **QDLatest.pdf file**.

It's always a good idea for each Library Staff member to use this choice upon first starting up QuickDOC after each update to get a general idea of what the latest changes, fixes and enhancements might be. Printing the entire document, or at least the sections of the document

describing changes germane to your operation, is recommended as an aid to becoming familiar with the latest version.

If the QDLatest.pdf file doesn't exist in your QuickDOC Program folder then this selection will be grayed out.

Tool Bar.

The buttons on the QuickDOC Tool Bar provide access to the most used of the program's forms and activities. There are Tool Bar buttons for the following:
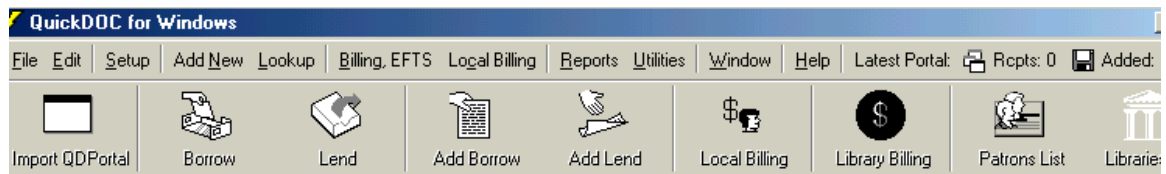
Import QDPortal

Clicking this button will import any Lend or Borrow activity that was recorded from your last DOCLINE session. If, for some reason, you just want to import Lend activity and not Borrow, you can choose one or the other from the File Menu under Import. If this button is enabled (not grayed out), then you know that there are some items to import. Just click to begin import. See also **QuickDOC and QDPortal**
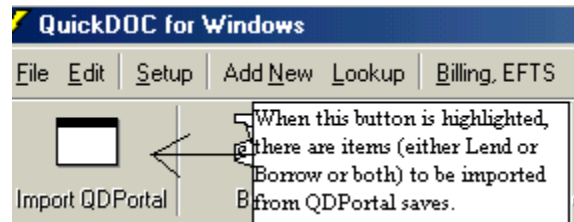
Since the Import QDPortal Button is **enabled only after a check for import files is made during Startup and whenever QuickDOC is minimized and restored**, if the button is **disabled**, you can force it to check again for import files by minimizing QuickDOC and immediately restoring the program from the Taskbar.

Borrow

Clicking this button will bring up the Borrow Grids, which include **Requests Outstanding** and **Borrow Item Backfile**. Always check which one you may be using, since these Grids display different items and will obviously have an effect on whether or not an item you are searching for is available to be displayed on that Grid. The name of the Grid is displayed in the blue bar at the top and is always either Requests Outstanding or Borrow Item Backfile. The first time you open a Borrow Grid in any QuickDOC session, it will default to the Requests Outstanding Grid; thereafter, the default will be the Borrow Items Backfile. There is a **white toggle button** just under the title line that you can use to toggle back and forth between the two Grids. **Go To Outstanding Only** will move you from the Borrow Item Backfile to the Requests Outstanding Grid. **Go to ALL Borrowed Items** will move you from the Requests Outstanding Grid to the Borrow Item Backfile. The Requests Outstanding Grid will generally populate itself upon display, but if it doesn't just click the Search button or press Enter in the white Search Box to fill the Grid with Items Outstanding. You can also get to these Grids by using the Lookup menu on the Menu Bar, and choosing Items Borrowed. See also Borrow Functions.

Lend

Clicking this button will bring up the Lend Grids, which include **Items Received** and **Lend Item Backfile**. Always check which one you may be using, since these Grids display different items and will obviously have an effect on whether or not an item you are searching for is available to be displayed on that Grid. The name of the Grid is displayed in the blue bar at the top and is always either Items Received or Lend Item Backfile. The first time you open a Lend Grid in any QuickDOC session, it will default to the Items Received Grid; thereafter, the default will be the Lend Items Backfile. There is a **white toggle button** just under the title line that you can use to toggle back and forth between the two Grids. **Go To Received Only** will move you from the Lend Item Backfile to the Items Received. **Go to ALL Lend Items** will move you from the Items Received Grid to the Lend Item Backfile. The Items Received Grid will generally populate itself upon display, but if it doesn't just click the Search button or press Enter in the white Search Box to fill the Grid with Items Received. You can also get to these Grids by using the Lookup menu on the Menu Bar, and choosing Items Loaned. See also **Lend Function** for more information.

Add Borrow

This button brings up the Add Borrow Form, which is used to **add non-DOCLINE Borrowed Items** to the database. It can also be used to add manually any DOCLINE item that wasn't, for whatever reason, properly saved from a DOCLINE session.

Add Lend

This button brings up the Add Lend Form, which is used to **add non-DOCLINE Loaned Items** to the database. It can also be used to add manually any DOCLINE item that wasn't, for whatever reason, properly saved from a DOCLINE session. See **Add New Lend Item** for more information.

Local Billing

This button brings up the Local Billing Grid, which is used to manage Patron/Dept Billing. See **Local Billing** for more information.

Library Billing

This button brings up the Library Billing Grid, which is used to manage Invoices, payments and EFTS activity with other Libraries. See **Library Billing** for more information.

Patrons List

This button shows the Patrons List, which is used to access the Edit Patrons Form. This list is also available from the Menu Bar, under LookUp, Patrons. See **Library Billing** for more information.

Libraries List

This button shows the Libraries List, which is used to access the Edit Library Form. This list is also available from the Menu Bar, under LookUp, Libraries. See **Libraries** for more information.

To Expose a Hidden Tool Bar Button:

If any of the above **Tool Bar Buttons are not visible onscreen**, they can be revealed by clicking the Down Arrow that will appear on the far right of the Tool Bar in such an instance.

Tool Bar Button Icons Missing:

Nancy Smith reports a fix for a case where the icons that normally appear on each Tool Bar button are missing and the **Tool Bar Buttons show text only**:

When we installed an earlier version of the new QuickDOC on two fairly new Windows98 Gateway workstations, we were unable to get the Toolbar's Borrow, Lend, etc. icons to display properly under the standard display settings. Only the last 2 icons in the Toolbar displayed with their appropriate graphic -- all the others were a button outline with lines across it.

We were able to "fix" this by changing the Gateways' display settings to 256-colors (from Thousands, or Millions). Making this one change enabled all of the icons to be displayed properly.

Status Bar.

The QuickDOC **Status Bar** appears at the bottom of the screen and shows the complete path to the QuickDOC.MDB database, along with the Current Date (in the Medium Date format used by the machine running the program) and Time.

If you can't see the Status Bar at the bottom of the screen, it's probably hidden behind the Windows **Task Bar**.

If you'd like to have both the Windows Task Bar and the QuickDOC Status Bar visible, you can **show the QuickDOC Status Bar** by **re-sizing the QuickDOC Main Screen**. First use the vertical scroll bar on the right side of the screen to move all the way to the bottom. Then move the Mouse Pointer until it's over the horizontal bottom line of QuickDOC (just under the Status Bar) and the cursor shows an up- and down-arrow. Drag the bottom up about a quarter of an inch and then slide the vertical scroll bar back up to see the results. Repeat until both the Status Bar and Windows Task Bar are visible onscreen. Once this is set, it should become the default for future sessions.

QuickDOC-L List

The University of Massachusetts Medical School has graciously hosted the **QuickDOC-L Listserv** since its inception in the late 1990s. The list provides announcements of all QuickDOC Updates, as well as a forum for exchange of ideas, suggestions for improvements, and general current awareness tools for both QuickDOC and DOCLINE®. You can join, unsubscribe, or change subscriber settings at the UMass Medical School web site:

http://list.umassmed.edu/read/about/?forum=quickdoc-l.

Clicking the subscribe button will bring you to the **Subscribe** screen.

Enter your email address and name here and click subscribe. You'll see a notice that an acknowledgement message has been sent to your email address.

Once you're subscribed, you can change settings at the **My Account Tab**:

You can also use this choice to enter the list using your old email address so that you can make the change to a new one. This is a solution to the old problem with lists where, once your email address was changed, there was no way to post a change of email address to the list, itself, since the posted change would be coming from the new (non-registered) email address.

Use the **Advanced** feature to change your **Listserv password**, etc. If you subscribe to more than one list at this site, they'll be listed under **My Forums**.

While you can always **Read QuickDOC-L Messages** or **Create QuickDOC-L Messages** after you login, anyone can also read (but not create) messages at the read-only URL:

http://list.umassmed.edu/read/?forum=quickdoc-l.

That Create New Message button above won't work, though, unless you login first.

QuickDOC and QDPortal

How the QuickDOC Program Interacts with QDPortal

To import requests, from either Receipts or Borrows, it is necessary either to click the **Import QDPortal button** or to choose **Import** from the **File Menu**. If you use the **Import QDPortal Tool** then items are imported in the following order:

1. **Receipts** (file C:\QDLoan**QDPLData.txt**)

2. **Lend Updates** recorded on DOCLINE (C:\QDLoan**LendUpdt.txt**)

3. Lend Updates tried during last import but not found (C:\QDLoan**SaveUpdt.txt**)

4. Lend Updates tried twice before but not found (C:\QDLoan**SaveUpd1.txt**)

5. **Full Display Borrowed Items** (C:\QDBorrow**QDPBData.txt**)

6. **Short Display Borrowed Items** (C:\QDBorrow**12345.txt** – numbers = 1st Request Number)

7. **Loansome Doc Receipts** (C:\QDBorrow**QDPLDX.txt**)

8. **Loansome Doc Updates** recorded on DOCLINE (C:\QDBorrow**LDXUpdt.txt**)

9. **Loansome Doc Transfers** recorded on DOCLINE (C:\QDBorrow**LDXTrfer.txt**)

10. **Cancels** made on DOCLINE (C:\QDBorrow**Cancel.txt**)

General results of the import are posted on the right end of the Menu Bar, in the following manner:
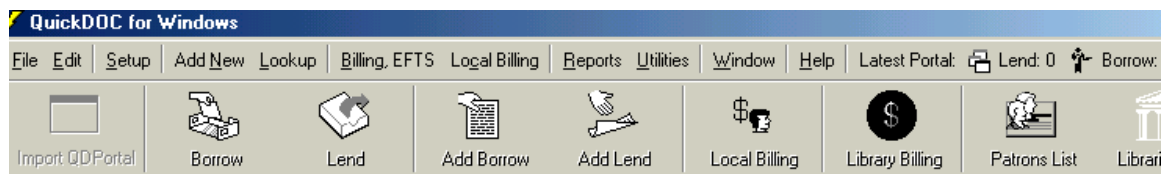
Tool tips give a brief description of each label. **Latest Portal: Lend** lists the number of Receipts imported into the database from the last QDPortal session. **Latest Portal: Borrow** lists the number of Borrows added in the last Import QDPortal click. These numbers should match the number of printouts you have. If either number doesn't, use the printout to add the missing item using the **Add Borrow** or **Add Lend** button.

QDPortal Receipts

All RECEIPTs that were accepted using QDPortal are logged to a file **C:\QDLoan\QDPLData.txt** on the C: drive of whichever user was actually receiving the request. Likewise, whenever an item was updated on DOCLINE while the user was in QDPortal, that information was retained also (in filename **LendUpdt.txt**).

Rush and Urgent Patient Care DOCLINE Requests

DOCLINE 2.7 introduced 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** were 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 looks for these words as well when importing data (screen shots below are from NLM 2.7 examples).

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

New Libraries may be added during Import

If the Borrowing Library isn't yet included in the **tblLibs table** of the QuickDOC.MDB database, it will be added during import, using such information as is available from the Receipt form. A record is written to a centrally located file **NewLibNt.txt** 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. See the entry for Log Files under QuickDOC Reports for more information.

Delivery and Billing Addresses of new Libraries are checked.

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. 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):
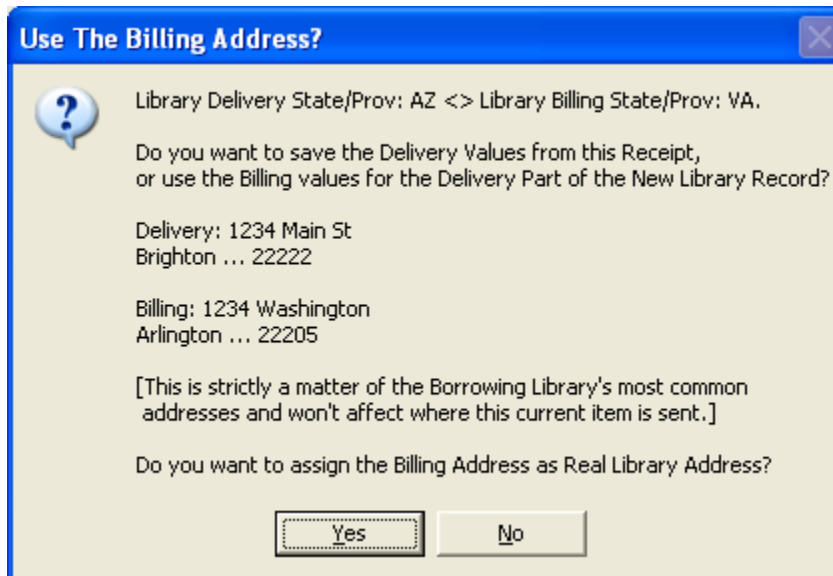
Click Yes to use the Billing values for this new Library, or No if indeed the Library's primary Delivery Address is very different from the Billing Address. Also remember that you can always change either of these by editing the Library record.

NoSave.txt File

If there is a problem while saving a Receipt to the QuickDOC.MDB database, you may see a notice to this effect in a file in the QDLoan folder under the database location called NoSave.txt. At the end of the session, if this condition exists, you will see a Message Box suggesting that "QuickDOC Import detected that one or more Receipt Items were not successfully imported into the Database" and asking if you want to print the NoSave.txt file. Always do so.

The NoSave.txt file entry will look like this:

```
Not Imported: 9848468 Borr: COUCSS Date Rec:  3/5/03 Title: Advance for

Last Error message reported from database operation:

There Was a Problem While Adding the New Lend Item Record.  [3704]

Description:

Operation is not allowed when the object is closed..


Check Values & Make Sure the QuickDOC Database is Available.
```

This entry indicates that there was (probably a big) problem with the importing of Receipts during the current session. The NoSave.txt file contains references only to major problems (it won't, for example, bother to notify you if the import is skipped because the Request Number of that item is already in the database). ALWAYS TAKE THE EXISTENCE OF THIS FILE SERIOUSLY.

In the case above, you would already have seen a Message Box at the time the addition of this item failed, because the Error notation that **Operation is not allowed when the object is closed** indicates that the connection to the database may have been lost.

The message box will ask: "**Do you want to stop Importing now**?" and probably, in the case above, you should say Yes. Exit out of QuickDOC, come right back in to re-connect with the database, and try again.

If you keep getting this error then there may be something wrong with the Import file, so you can just let it run through, with the understanding that you may have to check each Import item from

the printed Receipts to be sure that they are all there. Any that are missing you can add manually, either in Add Lend or by re-posting each Receipt from DOCLINE in Status/Cancel.

All items displayed in full in **DOCLINE Status/Cancel** are always saved again, on the off chance that they need to be added to the database during the next import. Since duplicates are never added, there is no danger in running them through import, just to be sure.

DOCLINE Lend Updates Imported from QDPortal

The import process will try three times to update an item marked Received in the Lend Items file to reflect the action taken on DOCLINE. First will be the attempt from the original **C:\QDLoan\LendUpdt.txt** file.

In most cases this first try will be successful. If the first try fails, the update is saved in the file C:\QDLoan**SaveUpdt.txt**, from which it will be offered again as an update during the next Import. If this attempt fails, there is one more try, from the file C:\QDLoan**SaveUpd1.txt**.

UpdtFail.log File

After each unsuccessful update attempt, an entry is made in the file **UpdtFail.log** located in the QDLoan folder under the database location. This **Update Failed Log**, which can be opened using Notepad, can be useful in diagnosing database update problems and bottlenecks. A typical entry might be:

```
Log Update Message after successful Update of ReqNo: 7031315

Fill Date: 28-May-02  Status = N

Update Message saved:

Item Receipt record for 7031315 not found in database.
```

If the update activity continues to fail, you may see up to 3 entries in the UpdtFail.log before QuickDOC gives up and sends the item to the **Orphan Update File**. If an attempt succeeds on the second or third try, then you will see just one or two entries here, and no entries in either the Orphan Update File or the audit file for the Orphan Update file, the NoUpdt.txt file.

NoUpdt.txt File

After the third try at updating the Receipt in the database, the update information is moved to the Orphan Update File (**OrphUpdt.txt** located in the QDLoan folder under the database location). As a note of explanation as to why the last attempt failed, an entry will be made in the **Orphan Update Audit file**, NoUpdt.txt, in the same location, containing as much information about the transaction as possible. A typical entry might be:

```
Moved to the Orphan Update File (update these manually and delete
the file S:\QuickDOC\QDLoan\OrphUpdt.txt

DOCLINE Requests Updated – Feb 14, 2003

9001884FilledAriel

Last Error message reported from database operation:

Item Receipt record for 9001884 not found in database.
```

The message above indicates that, for whatever reason, the original Receipt never made it to the database and should probably be entered manually (or re-import using DOCLINE's Status/Cancel function if the item is still available there). This audit file can be deleted after printing, once the appropriate actions have been taken to add the missing item.

In cases where the Receipt was done on one machine, and the update on another, unmatched updates are saved (in either filename **SaveUpdt.txt** or, next step, in **SaveUpd1.txt**), so that when

the Receipt that prompted it is finally imported, the update action will be applied during the next session. If the update isn't accomplished in the first three startups, the information is moved to OrphUpdt.txt. See the section on **OrphUpdt.txt File** under "**DOCLINE Receipts Not Updating Automatically in Lend"** below**.**

QDPortal Receipt Imports also generate various reports on import results, including a report of new Libraries Added (in DBFolder**\QDLoan\NewLibNt.txt**) as well as various error reports. More information is available on these in both **Download and Installation** and **QuickDOC Reports** choices in Contents.

QDPortal Borrows

All Borrows that were requested using QDPortal are logged to a file **C:\QDBorrow\QDPBData.txt** (or to individual files named after the first request number, e.g., **123456.txt**, if the Full Display button on DOCLINE wasn't clicked) on the C: drive of whichever user was actually receiving the request. Cancels are stored in a file (filename **Cancel.txt**), and Loansome Doc transfers in filename **LDXTrfer.txt**. Loansome Doc items updated on DOCLINE as Filled (from the local collection) or Not Filled (and not transferred onto DOCLINE) are captured in the file **LDXUpdt.txt** and should update the QuickDOC.MDB database the next time the Import QDPortal button is clicked. If this automatic update doesn't occur (as appears to be the case in some situations), these items can be manually edited on the **Requests Outstanding Grid.**

Borrow Imports also generate various reports on import results, including a report of new Patrons Added (**PatronNt.txt**, in the QDBorrow folder under the database location), and Libraries Added (**NewLibNt.txt**, in the QDLoan folder under the database location) as well as various error reports. More information is available on these in both the **Download and Installation**, and the **QuickDOC Reports** sections.

Backups of QDPortal Imports

At the time of importing, backup copies of most of the saved text files are directed into a **\BackImp** folder just beneath both **DB\QDBorrow** and **DB\QDLoan**.

Backup copies retain similar names to the files they back up, but with a prefix of whatever the current year might be, so that they can be easily identified and archived or deleted at some future date.

The backup files are (assuming the year is 2005):

Backup File Name	Backs Up	Description
DB\QDBorrow\BackImp\2005BDat.txt	**QDPBData.txt**	(**backup of Full Display imports**)
DB\QDBorrow\BackImp\2005LDX.txt	**QDPLDX.txt**	(**backup of Loansome Doc imports**)
DB\QDBorrow\BackImp\2005SDat.txt	**123456.txt**	(**backup of Short Display imports**)
DB\QDBorrow\BackImp\2005LUpd.txt	**LDXUpdt.txt**	(**backup of Loansome Doc updates**)
DB\QDLoan\BackImp\2005LDat.txt	**QDPLData.txt**	(**backup of Lend Receipt imports**)
DB\QDLoan\BackImp\2005LUpd.txt	**LendUpdt.txt**	(**backup of Lend Update imports**)

The DB\QDBorrow**LDXTrfer.txt** file (which contains the LIBID of the Library to which the Loansome Doc request was transferred on DOCLINE) isn't backed up at this time.

Backup files can be used to re-import data in an emergency. They're the complete ASCII downloads of all DOCLINE transactions. The 2005SDat.txt file can be simply moved up a layer to the DB\QDBorrow folder and the import program will recognize it next time you click the Import button. The same is true for the other filenames mentioned above. It's best to move them, rather

than copy them, up, since they will, by definition, re-create themselves in the BackImp folder during the import.

This is the best way to **re-import a large number of borrow items** (remember, they'll be back in as Outstanding if they are Borrows). If it's only a short period during the year 2002, you could open the 2002BDat.txt file and just cut out the relevant portion and paste it into a new version of C:\QDBorrow\QDPBData.txt.

Running these through again won't import any request numbers that may already be in there, so there's nothing to lose. Also, while these filenames (2002BDat.txt, etc.) will be recognized in the topmost folder, if present, and imported, the **Import QDPortal** ToolBar button might not be enabled unless there's a real (e.g., QDPBData.txt) import file also there. If it's not enabled after you move these files up, just wait until after your next DOCLINE session (assuming there is activity there) and they'll be imported right along with that session.

Also, since the years are there, these files can be purged periodically, but it wouldn't hurt to save them somewhere, just in case.

At the time of the **first Borrow import**, a message box will ask whether you want to begin with the date 17-Jul-2000 (which is the date of the new DOCLINE intro). If you click no, an input form appears where a new date can be entered. Whichever date is chosen, any item with a Sent Date before that date is skipped and the data isn't imported into the database. It's still sent to the backup file, though, so keep that in mind: if in the future you choose to run the backup through again, for any reason, there'll be no date check then! You might want to delete the backup files right after import on the borrow side, so you won't forget.

DOCLINE Receipts Not Updating Automatically in Lend

The import process will try three times to update an item marked Received in the Lend Items file to reflect the action taken on DOCLINE. In most cases this will be successful on the first try. If the first try fails, the update is saved in the file C:\QDLoan**SaveUpdt.txt**, from which it will be offered again as an update during the next Import. If this attempt fails, there is one more try, from the file C:\QDLoan**SaveUpd1.txt**. After each unsuccessful update attempt, an entry is made in the file C:\QDLoan**UpdtFail.log**. This **Update Failed Log**, which can be opened using Notepad, can be useful in diagnosing database update problems and bottlenecks. A typical entry might be:

```
Log Update Message after successful Update of ReqNo: 7031315

Fill Date: 28-May-02  Status = N

Update Message saved:

Item Receipt record for 7031315 not found in database.
```

The message above indicates that, for whatever reason, the original Receipt never made it to the database and should probably be entered manually (a re-import using DOCLINE's Status/Cancel function is most often not available for Lends, particularly not for rejected items, as is the case above, where Status = N for Not Filled).

OrphUpdt.txt File

After three tries at automatically updating Lend Item Receipts to Filled or Rejected, items are moved to an Orphan Update file, indicating that you might want to add these requests manually since, by definition, these are items not found in the database and may therefore represent missing items (not imported properly, for whatever reason). You can check for the presence of an **OrphUpdt.txt** file under the **Utilities Menu**.
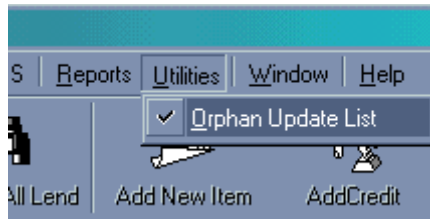
Clicking on the **Orphan Update List menu choice** loads the file in a Rich Text Box, where it can be edited. It's also possible to copy request numbers from the Orphan Update file and paste them into the Add Lend Item form, although request numbers are short enough that this isn't really necessary:
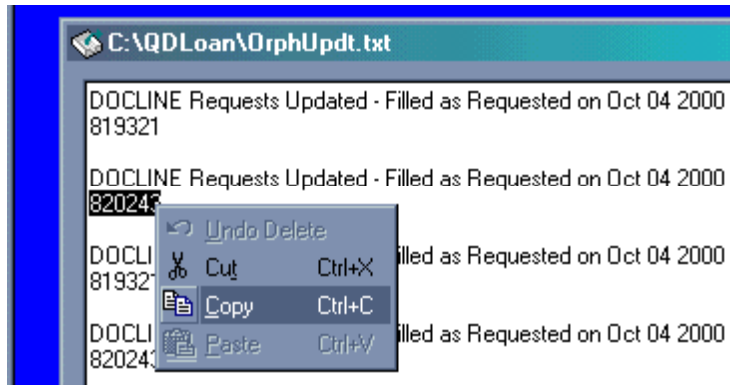
The Orphan Update List can also be printed, deleted or reprocessed, using the File Menu:
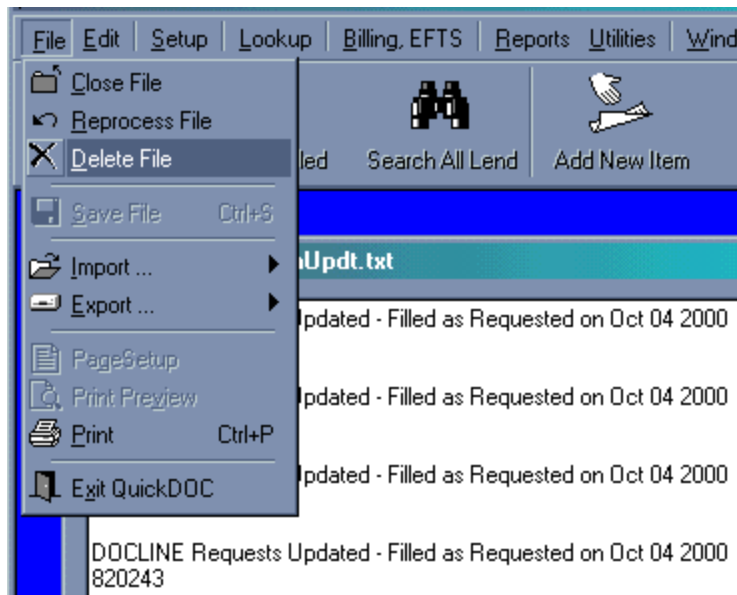
Delete the file when you're finished adding any items that need adding.

Reprocess the Orphan Update File

The **Reprocess File (Orphan Update)** choice basically renames the file back to C:\QDLoan\SaveUpdt.txt, so that it can be run through again, either next time you start up QuickDOC, or directly by choosing **File, Import, QDPortal Saved Items**.

(If, as you consider adding orphaned items, you discover you don't have a copy of the printout, you might also try opening up the backup (C:\QDLoan\BackImp\QDPLData.txt) download file in

either Notepad or WordPad and searching for any occurrence of each of the orphaned request numbers in that file, although the odds are that they won't be there if the Receipt wasn't properly recorded, obviously. If you aren't successful there, just set a printed copy of OrphUpdt.txt aside and use it to look up the necessary information when you get the appropriate end-of-quarter report from DOCLINE. It won't have all the information but should have enough to identify the item and Borrower.)

Retrieving Missing DOCLINE Receipts

Sometimes, either because the **DOCLINE Receipts** were made on a machine directly, not in QuickDOC, or for some other reason (a missed update, for example), you may find that certain requests have never been imported into the database. Here's an example from a posting on QuickDOC-L:

-----Original Message-----
We now have the correct portal and Quickdoc on each machine, but it looks like some of the lends are not recorded, any idea where they go? Also, i have a list of orphan updates, it seems that they all need to be put in manually but why do they end up there?

The Orphan Updates are there because, when QDPortal saved the update action on these requests, there was no request to update when they were subsequently imported. I'm sure that, during the upgrade confusion, some of these Receipts weren't imported.

You can fix this (for Receipts that were filled and were filled within the past 28 days) as follows:

1. Print a copy of the Orphan Update File to refer to (click **Utilities** on the Menu Bar, then **Orphan Update List**, then click **File** on the Menu Bar, then **Print**).

2. For requests that were updated **more than 28 days ago**, you're out of luck. You either have to enter them manually (if you have a printout of the request information or otherwise have access to those specifics, in which case you can indicate the action taken at the same time, since it's easy enough) or just count them and then add them to your totals.

3. For requests within the past four weeks, you can use QDPortal to retrieve them in **DOCLINE Status/Cancel**. Go to Status/Cancel and display each request available (you'll see the "Request Info saved ...," in the yellow box above). These will be saved in a Lend Import file just as if they were new Receipts.

4. Once all available Lend Items have been saved through **Status/Cancel**, exit DOCLINE (and QDPortal) and start up QuickDOC. Click **Import QDPortal** to bring these items into the database.

5. They should now be in the **Items Received Grid**. The action you've taken on them is still in the Orphan Update File. To **run the Orphan Update File again**, so that the action taken can be applied against these new copies of the original Receipts, do the following:

> a. Click **Utilities** on the Menu Bar
> b. Click **Orphan Update List**
> c. Click **File** on the Menu Bar
> d. Click **Reprocess File**

This will put the Orphan Update File back in play, and will run it against the database the next time you do an import. It should update any of those newly-retrieved Status/Cancel Receipts with the appropriate action taken.

Importing data from other QDPortal Downloads

To **import data that may have been saved on a machine without QuickDOC**, or to run the backup text files back through the import process, use this procedure (this is for Lend imports, but the procedure is the same for Borrows, just substitute the Borrow filenames for the Lend, below):

1. First, **ALWAYS** check your current **C:\QDLoan folder** to be sure there are no **QDPLData.txt** or **LendUpdt.txt** files already in there. If either of these files exists, start up QuickDOC to process those first before proceeding.

2. Locate the C:\QDLoan folder on the machine you want to Import From (the Source) and see if it has files named QDPLData.txt or LendUpdt.txt. (If you're running backed up Imports back through the system, you'll ALWAYS find the raw data in those two filenames in folder **C:\QDLoan\BackImp**.)

3. If these files exist in the Source folder, copy them onto disk or over the network into the C:\QDLoan folder on the machine with the QuickDOC.MDB database. Again, **MAKE SURE THERE'S NO CURRENT QDPLData.txt (or LendUpdt.txt) FILE ALREADY IN THERE, OR YOU'LL OVERWRITE IT**. (If you're running the C:\QDLoan\BackImp files through again, you can **MOVE** them up to the C:\QDLoan folder, rather than copying them, since the process will result in their being saved again back to the C:\QDLoan\BackImp folder as they're processed. If you copy the files, they'll be added again at the end of the original, resulting in a much larger file, with unnecessary duplication.)

4. **Start up QuickDOC** and click the Import from QDPortal button. This will cause the program to look in C:\QDLoan for a QDPLData.txt file and, finding it, suck the data into the db. The SaveUpdt.txt file (which may be a reprocessed OrphUpdt.txt file) will then find any new records added, update the records, and disappear (assuming they're all found - if not, then use 'Add Lend Item' to add them).

You can also initiate an **Import from the QuickDOC Menu Bar**, to perform this action at any time. This will be the preferred method in situations where both QDPortal and QuickDOC are running at the same time. You can click over to QDPortal to get receipts, and once the Receipts have been acknowledged on DOCLINE, click back over to QuickDOC, open the **File Menu**, click "**Import**" and then click either "**QDPortal Borrow Items**" or "**QDPortal Lend Items**" to bring them right into the database.

The same can be done right after doing a Lend Update on DOCLINE, to register action taken immediately to the database.
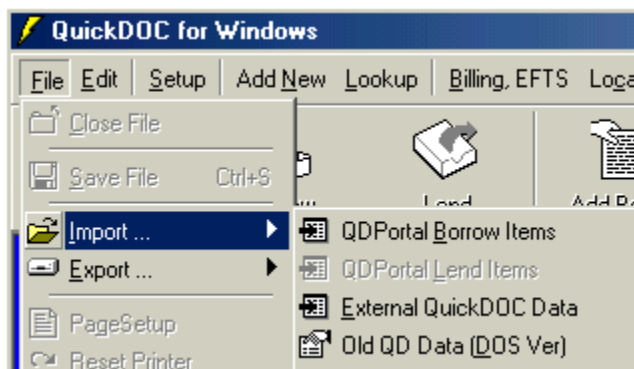
Missing Records in QDPortal Imports

Occasionally it may appear that activity transacted on DOCLINE isn't making it into the QuickDOC.MDB database. There are a variety of reasons why this might occur. Here's a checklist that identifies the most common culprits:

1. Make sure you're using **current versions** of both QuickDOC (at least 2.1.7, with the current version at 2.1.8, as of June 2007) and QDPortal (1.1.2). You can check under **Help, About QuickDOC** in QD, and on the **Setup Screen** in QDPortal.

2. Make sure you have **rights** in all the appropriate folders. See Folder Rights, below.

3. Make sure that all machines running QDPortal sessions always immediately start up QuickDOC after logging off DOCLINE and click the **Import button**. This moves the data from the temporary location on the C: drive of that machine into the database.

4. Make sure all your machines are pointed to the same QuickDOC.MDB database. You can check the **database location** in the Status Bar just beneath the blue screen in QuickDOC.

5. On the Lend side, check to be sure that **automatic updating** is occurring by clicking the Lend Toolbar button just after starting up QuickDOC. This will always show you the Items Received Grid. These are items that are currently in process, and you should only see items from the past day or two. If you see older records, then this is a sign that something isn't being updated properly. You can fix them manually, but you should also take it as a signal that one of the other points mentioned in the list may be going awry.

6. On the Borrow side, where there isn't an automatic updating, make sure you're **checking in items when they arrive**.

Folder Rights. In general, all users will need permissions in the following folders:

a. The central QuickDOC.MDB folder (and subfolders);

b. The QuickDOC and QDPortal program folders (and subfolders);

c. The C:\QDBorrow folder (and subfolders) on each machine;

d. The C:\QDLoan folder (and subfolders) on each machine.
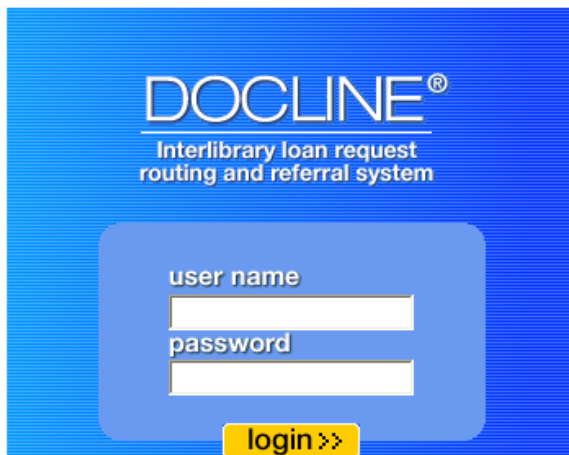
If none of these methods locates the missing batch, then they must have been captured and saved on a machine whose files were somehow deleted or overwritten for that period, and there's really no recovering from that except through paper records, if you have them.

This should be a one-time problem, though, since current and future items are monitored and imported as they arrive, and database files are backed up regularly (we hope).

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, 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.

Single Lend Receipt Window

QDPortal will display the Single Lend Receipt, introduced in DOCLINE 3.1, and will permit a printout of this request, using the IE **Context Menu**, but **no automatic re-importing of the request will occur**.

Because this new window is essentially a new instance of the browser, it doesn't have access to the routines that are contained in QDPortal itself. If you want to re-import information from a request, continue to use the **Status/Cancel full display** to cause this to happen.

Click the x at the upper right to close this window.

Local Preferences Form

The Local Preferences Form replaces the old **Billing Setup Form** (and adds many other features). It has five Tabs: **General**, **Addresses**, **DOCLINE Fields**, **Billing Prefs** and **Email**.

The **Set Local Preferences** form is available under **Setup** on the **Menu Bar**.
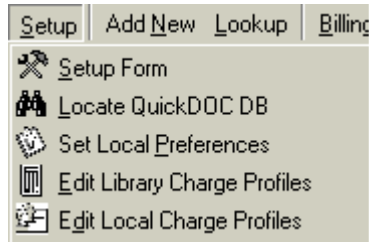
General Tab Local Preferences

The **General Tab** of the Local Preferences form includes various DOCLINE, **EFTS** and other local choices, and will appear as follows:

Send Patron Number only on DOCLINE. Matches the current use in QDPortal but will keep the information in the database rather than as a Registry entry.

Start Date to begin counts. Enter the Month and Day on which your most important counting year (usually either Fiscal Year or Calendar Year, although both of these may be the same) begins. In general, this is the date on which you want your annual default counting to begin. While most reports allow you to set the period before the report is printed, some automatic reports use a default for Start Date in reporting (or displaying). This date becomes your **Fiscal Year Start Date**. In almost all cases the Start Day will be 1, but you may set this to sometime later in the month, if you wish to. If you do, this probably won't make much difference, since reports normally revert to the beginning of a month in any case. Most entries will be either Jan 1 or Jul 1 or Oct 1, and will have some effect on a number of reports and displays

> **Default Start Date Counting** in QuickDOC determines the start date for calculations of charges, using either Library Charge Profiles or Local Charge Profiles in the following categories:
>
> 1. **Free items for Patrons** this year
>
> 2. **Free items for Departments** this year
>
> 3. **Free items for Libraries** this year
>
> On the **Borrow Item and Lend Item backfile screens**, each time you load those Grids, the backfile of items displayed is limited by Date using the following criteria:
>
> 1.   If the Fiscal Year Start Date is equal to Jan 1st then the **Grid's default begin date** is either:
>
>> a. **If today's date is before June 30th**: the display would begin at the <u>first day of the month 180 days ago</u>, e.g., on June 23rd the grid would start the display with December 1st of the previous year or,
>>
>> b. **If today's date is July 1st or later**: the display would begin at the <u>beginning of the current year</u>, January 1.
>
> 2.   If the the Fiscal Year Start Date is later than January, then the **Grid's default begin date** is either:
>
>> a. **If today's date is later than the Fiscal Year Start Date**: the display will begin at the <u>beginning of the current year</u>, January 1 (e.g., if the FY Start Date is Oct 1, and today's date is November 23rd, the display would begin at 1 January of the current year).or,
>>
>> b. **If today's date is earlier in the year than the Fiscal Year Start Date**: the display will begin at the <u>Fiscal Year Start Date in the last calendar year</u> (e.g., if the FY Start Date is Oct 1, and today's date is June 23rd, the display would begin at 1 October of the previous year).

Here is what the Default Grid Dates would look like if the Fiscal Year begins on October 1 and today's date is July 2 of the following year:

Default Start Date Counting for Quick Journal Reports will default to the beginning of the current calendar year, but see the Journal Copyright counts checkbox below for a method of changing this behavior.

Default Start Date and End Date Counting for Most Reports is always the first day and last day of the previous month. If you change this for one report, your new dates will stay in effect until you exit the reports form. When you return, the previous month's default dates will be the default once again.

Use Date above for Journal Copyright counts also. This checkbox, if checked, will cause **Quick Journal Reports** (which generate a quick one-page report of the number of times a journal title has been borrowed or loaned, and is available on both Borrow and Lend Grids by clicking into the Title column, at which point a Print Quick Jrnl Report button will appear on the upper right of the Grid) and **Rule of 5 CONTU Guidelines** counting to begin at the beginning of the Fiscal Year, rather than the normal January 1st Start Date.

In most cases you will want to hold to the January 1st start date even if your Fiscal Year is different, because the copyright reporting requirements for U.S. Libraries seems to insist on a calendar year interpretation, but non-U.S. libraries and others with different requirements might want to measure their journal usage on a fiscal year basis.

Default Source when adding non-DOCLINE Requests. This will be the default in the Source box on both the Add Borrow and Add Lend forms when those forms are first loaded (the current default is DOCLINE, which remains available as a choice if needed). Thereafter, the default will be the setting from the previous entry.

Unless you turn off the automatic prefixing (see below), QuickDOC will also generate the rest of a **unique non-DOCLINE Request Number** by using Today's Date and the number of items added today. When you first bring up the Add Borrow Item form, the program checks in tblLocals of the QuickDOC.MDB database to ascertain the default source and the number of items added already on this date. If your default Source is OCLC, and Today's Date is July 10, 2003, and this is your first non-DOCLINE addition of the day, the Request Number will appear automatically, as follows:

Each time you change the Source in the Source combo box, QuickDOC reformats the request number. You can override this automatic format, but be aware that, if you do so and then change the Source before filing the request, the program will reformat the request number back to its typical design.

55.

Standard non-DOCLINE Prefixes. QuickDOC will automatically prefix non-DOCLINE requests entered in the Add Borrow or Add Lend Item forms with a set of standard prefixes. These are to ensure that non-DOCLINE items are automatically prevented from using a future DOCLINE Request Number. They will also permit easy display of all items in one category by using the **Beginning With** limit on the Request Number search to display all items beginning MA (all Mail requests), etc.

Standard prefixes used are as follows:

COPY	-	Copy Service
EM	-	Email
FA	-	Fax
MA	-	Mail
OC	-	OCLC
OT	-	Other
RL	-	RLIN
TE	-	Telephone

Suppress use of standard non-DOCLINE Prefixes. QuickDOC will automatically prefix non-DOCLINE added items with letters to indicate the source (e.g., **OC = OCLC**, **RL = RLIN**, **COPY = Copy Service**, etc.). This is to ensure that no made-up Request Number is in danger of duplicating a real DOCLINE number. If there is already a plan in place locally to do this, you can check the box to use your own prefixes rather than the built-in versions. Suppressing this behavior also suppresses the automatic use of today's date and unique number, so you're on your own to create a number (making sure it's unique and also not likely to be used by DOCLINE) for that request.

EFTS Upload Information

EFTS URL. The URL for the EFTS system, (https://efts.uchc.edu/efts/common/index.html) as of 4/2005.

EFTS Password. Your Password in the EFTS system; used along with your LIBID to log in.

Check EFTS=Yes on 'Epayment' Receipt. Check this box to AutoUpdate Libraries to **EFTS = Yes** whenever **Epayment** appears at top of any Receipt from that Library. This will change automatically a Library's **EFTS Payment Supported** value from No to Yes whenever a Receipt is imported from that Library with the Epayment notation at the top. The rationale here is that this will be a time-saver for newly-joining EFTS members: once they have checked their own EFTS Payment Supported checkbox, they will then have other EFTS members in effect update themselves during their next Receipt.

This caused problems, however, for a few Libraries who had special Billing arrangements with other libraries that were also EFTS members. These records kept being changed back to **EFTS = Yes** when they wanted it kept at **EFTS = No**.

Unchecking this checkbox will, for future Receipts, **suppress that EFTS check for Library records on Receipt of a request marked Epayment**. Only **newly-created Library records** will automatically record the Library as EFTS = Yes if the first Receipt from that Library is an Epayment.

Most libraries will want to check this box. (You also get a chance to reset this value whenever you change your own Library's record to EFTS Payment Supported = Yes, but most will find it more convenient to set the value here.) Checking this box doesn't affect the EFTS Payment

Supported value in your own Library's record, so don't forget to make sure that your own Library's record also has its **EFTS Payment Supported** checkbox is checked.

EFTS Activity Report Parameters

These establish the date and balance at which EFTS tracking will begin.

Start Date

If you began using EFTS only within the last couple of months, use the month of your first online **EFTS Monthly Statement** as your Start Date. Or choose some recent month to begin tracking based on your EFTS Monthly Statement for that month. See below, under How to set up your initial EFTS Activity Report for further discussion.

Beginning Balance

Use the Beginning Balance noted on the EFTS Monthly Statement for the month you choose to begin tracking.

How to set up your initial EFTS Activity Report

Because the EFTS Activity Report will be used to provide an up-to-date snapshot of your EFTS income and liabilities on the date it is run, it's important that your EFTS credits and debits be properly entered so that your projected balance is truly accurate. In order to reduce the amount of initial data entry required, the Local Preferences Form, General Tab, provides a place to indicate the month and year where you intend to begin tracking (the EFTS Activity Report **Start Date**), and the balance at the end of the month just prior to that month (which is also the **Beginning Balance** of that month's EFTS Statement). For our example, we've chosen the EFTS Statement of 07/2004:

July 2004 EFTS Statement, with Beginning Balance,			EFTS Statement	
LIBID	MAUBET	Statement Date	07/2004	
Beginning Balance	$141.91	Account Status	A	
Processing Fee	$0.60	Processed Transactions	4	
Total Credits	$20.00	Number of Credits Received	4	
Total Deposits	$2,000.00	Number of Deposits	1	
Total Redistribution	$0.00	Number of Redistributions	0	
Total Other Fee	$0.00	Number of Other Fees		
Total Debits	$263.00	Number of Debits Received	27	
Ending Balance	$1,898.31	Calculated Average Monthly Debits	$165.67	

Detailed Credit Summary for MAUBET

Borrower Account No	Request Number	Citation	Date Filled	Charge
MAUTUF	14160780	2003 THYROIDMAR;13(3):291-5	07/01/2004	$11.00
			SubTotal	**$11.00**
MAUVBD	14159224	1985 SOUTHERN MEDICAJAN;78(1):16-9	07/01/2004	$3.00
MAUVBD	14245960	2001 CANCERSEP 15;92(6):1451-9	07/01/2004	$3.00
MAUVBD	14306890	2003 ANN PLASTIC SURAUG;51(2):210-8	07/01/2004	$3.00
			SubTotal	**$9.00**
			Total	**$20.00**

If you began using EFTS only within the last couple of months, use the month of your first online **EFTS Monthly Statement** as your Start Date. In any case, enter the appropriate **Start Date** (format mm/yyyy) and **Beginning Balance** in the **EFTS Upload Information** section of the **Local Preferences** General Tab (under Setup on the Menu Bar, Set Local Preferences).

This establishes the date and balance at which the tracking will begin. If you should later go back and process as paid any items before that date (01-Jul-2004 here), be sure that the **Paid Date** is

also a date within that earlier period. In practice, this only means that you should watch out when batch processing a number of older requests as Paid: if you don't set the default date to the earlier date, or set the date on the Payments Form to an earlier date, you're likely to get **Today's Date as the Payment Date**, which will draw down your EFTS Balance inappropriately.

If you should inadvertently pay an older EFTS Borrow Request from a post-Start Date deposit, you can recover either by unpaying that item or by adding the total amount of the payment to the Beginning Balance in Local Preferences, either of which methods will restore the accuracy of the current EFTS Balance amount.

You can also **reset your EFTS Activity Report Start Date** on the **Local Preferences** Form to a later date (a date after whatever date you assigned to the mistaken payment), using the **Beginning Balance from that month's report**.

In fact, **resetting this value from time to time will keep the EFTS Activity Report brief**, and is an easy way to re-balance a report where payments were inadvertantly entered using a payment date later than it should have been.

After setting the Start Date and Beginning Balance in Local Preferences, follow the steps enumerated below to prepare your initial EFTS Activity Report.

1.   **Print copies of your EFTS Monthly Statements**. Display and Print a **Detailed Monthly Statement**, using the Reports section of **EFTS Online**, for each month beginning with the Start Month. You will use these statements at various points in the process described below.

2.   **Enter EFTS Deposit dates and amounts in the Borrow Deposits Table**. Enter your EFTS Deposit dates and amounts (using the first of the month for deposits--- remember: **Credits toward the first of the month. Debits toward the end!**) for deposits made after the EFTS Start Date in the **Borrow Deposits Table**. Use Library **EFTSUP** and enter the information under **Billing, EFTS** on the Menu Bar, with the choice **Payments as Borrower**. (You can also enter EFTS Deposits made before the Start Date, but be sure that the Date Paid is also earlier. In most cases, if you haven't already entered these earlier transactions, it's probably unnecessary if your goal is to track current activity and balances.)

3.   **Mark EFTS Upload Files as Paid**. Use the **Payments Form**, under **Billing, EFTS** on the Menu Bar, to enter **EFTS Upload File Payments** for any currently unpaid **EFTS Invoices** (which are listed as the EFTS Upload filenames). Click the Invoice Number Combo Box to expose the EFTS Upload File to be paid (e.g., EFTS-BET0406.txt), which comprises the **EFTS Upload Filename** (BET0406.txt), preceded by the prefix "EFTS-" and is composed as follows:

    a. The initial **EFTS-**

    b. The 3-letter **SERLINE code** of your library (usually the last 3 letters of your NLM LIBID)

    c. The **year** (two digits) of the last item in the Upload File

    d. The **month** (two digits) of the last item in the Upload File

    e. "**.txt**" as the final extension of a text file.

    f. For example, an upload file created with an end date of 6/30/2004 for the Library MAUBET would appear as **EFTS-BET0406.txt**.

    g. The actual filename would be the above minus the initial "EFTS-" and will be located in a folder called EFTS just beneath the folder where the QuickDOC.MDB database is located (the filename would be **…\EFTS\BET0406.txt**).

    h. If a file BET0406.txt already exists, then the filename will be BET0406a.txt, or BET0406b.txt, etc.

i. You'll find the items credited to your account listed under **Detailed Credit Summary** on your EFTS Monthly Statements. The **Amount Paid** for these should always equal the **Invoice Amount**. If, for some reason, that amount doesn't match the amount EFTS indicates in its report, enter that amount anyway, and then use a negative EFTS Service Charge entry to reduce it to the amount in the EFTS Report.

j. You can also enter payments from the **Library Billing Grid** by clicking into the proper **EFTS Upload filename** in the **Invoice column** and clicking the **To Pmts** button. Again, watch the Date Paid field if you're processing Upload Files that appeared on EFTS Statements before your chosen **EFTS Activity Report Start Date**.

4. **Mark EFTS Paid Borrowed Items as PaidEFTS**. Also using the information on your EFTS Monthly Statements between your Start Date and the current month, mark any items in the **BorrowItem Backfile** that have been paid through EFTS as **PaidEFTS**. If you use the **Record Selector** at the far left of each row, along with the **Ctrl key** to select multiple individual records, or with the **Shift key** to select a contiguous block of records (either of these two step-saving methods is highly recommended, if they're applicable), you can mark all selected records as PaidEFTS on a selected **Default Date** with a common **Paid Note** using one **Mark Paid** click. If you don't, you'll get Today's Date as the Paid Date and nothing in the Note Field. Use the last date of the statement month as the Paid Date, as suggested in:

GENERAL RULE: Credits toward the first of the month. Debits toward the end!

[Items that were paid before the Lending Library joined EFTS should be marked as PaidLender. To retrospectively mark items earlier than your EFTS Start Date as PaidEFTS, just make sure that the Default Date is earlier than the EFTS Start Date.]

5. **Enter EFTS Service Charges**. Use the **Payments Form**, under **Billing, EFTS** on the **Menu Bar**, to enter any **EFTS Service Charges** as negative amounts. Since this is the **Payments** choice (payments TO you, '**as Lender**' is assumed, while the last choice on that dropdown menu, '**Payments as Borrower**', is for your payments TO Lenders, including your EFTS Deposit Account payments), **negative entries here** will be deducted from the positive values posted as EFTS Upload File payments.

6. **Enter EFTS Redistributions**. Use the **Payments Form**, under Billing, EFTS on the Menu Bar, to enter any **EFTS Redistributions** as negative amounts. Like the EFTS Service Charges, these Redistributions will reduce the balance in your EFTS Account; unlike Service Charges, though, the money **Redistributions** take out of your EFTS Account isn't dispersed elsewhere but returned to you, so it's not an expense. It's more like a transfer from one account to another. QuickDOC therefore ignores these items when calculating annual income, except for the EFTS Activity Report.

7. **Re-run the EFTS Activity Report**. Check your data entry by printing an EFTS Activity Report, with a Start Date equal to the beginning of the current month to make sure that your **Running Totals** amount after **Uploaded Totals** (which will include your deposits and Upload credits, minus PaidEFTS items, Service Charges and Redistributions from the Borrow Deposits Table) is equal to your total as reported on EFTS.

Addresses Tab Local Preferences

The **Addresses Tab** of the Local Preferences form adds the ability to set different **Remit To Address** values for Library and Local **Billing Addresses**, as well as other information that will appear on Invoices.

The Addresses Tab appears as follows:

In most cases these will be the same, but the option is there to change them if they are not. Either, or both, of these **Billing Return Address** values may be different from the official **Library address**, since these will be the locations to which checks will be mailed and correspondence regarding billing directed, which may be a Billing Office rather than the Document Delivery Department of the Library.

DOCLINE Fields Tab Local Preferences

The **DOCLINE Fields Tab** of the Local Preferences form adds the ability to specify which **fields of the Patron Record you want to send to DOCLINE** (in the 40 spaces of the **DOCLINE Patron field** that are available) and in what order you want to send them. It appears as follows:

Copy and paste fields from the yellow box on the right to the appropriate field on the left.

Patron Name Field in DOCLINE

DOCLINE allows a maximum of 40 characters in the Patron Name field:

If we try to send a Patron Name string longer than 40 characters, DOCLINE will truncate the string at the fortieth character, which would be a real problem in QuickDOC, since the import process uses the Patron Number (always in brackets at the end of the Patron Name, as in the [6], above) to do the lookup in the Patrons Table. If part of this number is lost, confusion reigns. If you ever need to **edit the DOCLINE Patron Name**, remember to leave the space+[Patron#] unchanged at the end of the line.

Consequently, when creating the patrons list that shows in the upper right corner of the screen on DOCLINE, QuickDOC is careful to limit the size of the string, including the bracketed Patron Number, to a maximum of 40 characters. It uses the following conventions:

1. **Patron Name**. The Patron Name is set out, using the Last, First format, but is truncated at 14 characters if the **Last, First format** is longer than 14 characters. This should provide enough information, in most cases, to identify the correct Patron. In cases where the first 14 characters of two patrons are the same, then additional information, such as Dept., should be determinative.

   This reduces the space available in the field to 26 characters. Since there is always a space added after the Patron Name, the reality is that 25 characters remain free.

2. **Patron Number**. The program next checks the Patron Number and, based on the number of digits in the number (e.g., 1 for Patron Number 6, 2 for Patron Number 20, etc.), it sets aside a sufficient number of spaces at the end of the string to include the number plus the surrounding brackets. This will be anywhere from 3 to 7 additional spaces, although most often this number will be either 5 or 6. Our number of free spaces is now reduced to 19 or 20.

3. **Department**. Most libraries will want to include Department in the line as well, for identification purposes. QuickDOC automatically **truncates the Dept Abbreviation at 4 characters**, to save space on the line, so keep this in mind when creating abbreviations for Departments. Including the space at the end of the four-character Department Abbreviation, we are now left with **only 14 or 15 spaces that are truly available for optional fields** such as **Telephone**, **Email Address**, **Mail Stop** and **Cost Center**. Obviously, getting more than one of these options into that small footprint will be difficult. Any value that prings us over the 40 character limit will be truncated to allow a space plus the Patron Number to fit in at the end.

Some suggestions for utilizing these 14-15 optional spaces are discussed in Optional Patron Name Fields, below. In general, use the following criteria for deciding on which fields to add to the DOCLINE Patron Name field:

1. **Identify the correct Patron quickly on the QDPortal Patrons List**. Since the list will be used on DOCLINE to send the proper Patron info into the **DOCLINE Patron Name field**, putting the Department value in the first position after the Patron Name will immediately identify **Jones, Joe CARD** from **Jones, Joe MED** and will reduce the chance of error. Since Department is always truncated at four characters plus a space, this field has a minimal impact on the free characters available. Nevertheless, if you know all your patrons personally, or can infer the Department from one of the optional fields you would prefer to include, then you can re-direct these five characters to that field by leaving the Dept field out.

2. **Show Contact Info on Borrow Printout and Receipt Cover Sheet**. Since the Full Display printout of the Borrow transaction, and the cover sheet included by the Lender from its Receipt printout, will both include the full Patron Name line, that information is instantly available when items are received from the Lender. Including your usual Contact info on the Patron Name line can make it easy to pick up the phone and call the Patron (if you include Telephone), or send a boilerplate email notification (if you include Email), or pop the printout of the article into an inter-office envelope (if you include MailStop), the moment the item arrives in the library. It's an efficient way to speed the document to the end user.

On the other hand, don't forget that all this information travels along with the request to any potential lender along the DOCLINE Routing Table route. While this isn't patient information, and doesn't have the same level of sensitivity, the phone numbers and email addresses will be out there, although some of the features discussed in Optional fields, below, can limit the actual disclosure of complete phone numbers and addresses. Also, keep in mind that, if you've checked the **Send Patron Number Only on DOCLINE** checkbox in the General Tab, then none of this will be sent, no matter which fields you select here. Only the bracketed Patron Number will appear in the Patron Name field on DOCLINE.

Optional Patron Name Fields

In addition to the Last, First, Dept and Patron Number fields discussed above, there are five other choices that can be included. Because of the small number of available spaces for these optional fields, it will rarely be possible to add more than two, and you can usually only count on one of these to be displayed fully in all cases (given the 14-15 limit when Patron Names and Patron Numbers use their maximum number of characters). Here are some things to keep in mind when choosing which of these to add:

1. **Email**. Plans are to include an **automatic Patron notification by email** in the next update, so anyone who needs this information for Patron Contact can probably use that method after the next update. Meantime, to save space, any Patron whose email domain is the same as that of the Library will appear with the email domain suppressed. E.g., if your library's email address is mylibrary@myuniversity.edu and the Patron's email address is jjones@myuniversity.edu then the address will appear in the Patron Name field as jjones@, with no further information. Addresses that don't match yours will appear in full, however, and some of these may be fairly long, so the chances of truncation are greater here than in most of the optional choices.

2. **AreaCode**. If all (or 99%) of your Patrons are in the same area code, then there's no need to include this field in the Patron Name field. Unfortunately, because of the recent multiplicity of area codes in some areas, you may already have many Patrons, particularly Loansome Doc Patrons, with area codes different from your own. The following conventions apply to area codes included in the Patron Name field:

   a. Area codes are displayed in 3 digits and a hyphen (**123-**);

   b. If the area code matches the Library's area code then it is omitted (no hyphen, either);

   c. While it might appear that b., above, might give you permission to include area code even when you have only a few outsiders, keep in mind that **this computation also increases processing time** for producing the Patrons List and libraries with large numbers of Patrons might experience a perceptible delay while the list is being created.

3. **Telephone**. The number used is the **Voice Number field** on the **Comms Tab** of your Library record. As with area code, if the first four digits of the Patron's telephone are equal to your Library's first four digits (i.e., the same exchange, as in 123-), they are replaced by an **x**. As in the following cases, where your Library voice number is 123-4567:

   a. If the **Patron's Voice Number** is 123-5678, it will appear as **x5678** on the Patron List;

   b. If you commonly **abbreviate the Library phone number** to 23-4567 or 3-4567, or 123.4567, or 23.4567, or 3.4567 in the Library Voice Number field, as long as you also abbreviate the Patron's Voice Number in similar fashion, then QuickDOC will send x5678 to the Patron List; but if you use different formats at different times then results will surely be inconsistent.

   c. If you want to use your own **local telephone number format** for **Patron Telephone numbers** (e.g., **LOCAL5678** or **X5678** instead of the usual 123-5678), then **DON'T** use the 123- format that your Library record uses when entering Patron Voice Numbers. Since the beginning of each Patron telephone in those cases will never match the 123- of the Library phone, then QuickDOC will **never** find a match and will transfer the complete **LOCAL5678** (or **X5678** or whatever) entry to the the Patron List.

   d. One way to tell the difference between an **X5678** and an **x5678** where the **x** has been substituted for the Library Exchange 123- is that the **Library Exchange abbreviation always** has a lower case **x**, while an **X** entered into the **Voice Number field** will always be upper case.

   e. The **best choice** (easiest to remember) is to use a typical 123-5678 format when you enter your Library's Voice Number, and then to use the same format for Patrons. This will send the minimal x5678 as the Telephone part of the Patron List line.

4. **MailStop**. When adding this field in the Patron record, be sure to use abbreviations whenever possible. In fact, brevity is a good thing to keep in mind whenever adding information that might later be included in the Patron Name line on DOCLINE (exceptions are those fields where QuickDOC automatically matches the Patron value against the Library value, such as area code, telephone, and email, where care should be taken to use the complete value, so that matches will be accurate).

5. **CostCtr**. Since the Import process will always retrieve the **Primary Cost Center associated with that Patron record** and add it automatically to the item that is being imported, I'm not sure what is gained by including it here, except in cases where the Cost Center provides an identification link for a Patron record, in the manner described for Dept values, above. Another possibility might be where Patrons typically have more than one Cost Center attached, and the Patron field can be used to provide a visual clue as to which of them will be automatically added, so that items where a different Cost Center should be used can be edited after import.

Here's how a **Patron's List** might Look with only Last, First (total of 14 +1), Department and Email Addr. You can see that, even with this small group of fields, the email field may be cut off well before completion:

```
Bergman, Mark HEMO [934]

Berman, Cynthi PSYC [268]                    |  ← 40 char's

Berrada, Driss GAST dberrada@eart [1056]

Berson, Alma SOCW [273]

Bitton, Alain GAST [765]

Blackburn, Geo SURG gblackbu@ [1062]

Blank, Margot MED [278]
```

As you can see, the Berrada Patron, truncated to the first 14 Last, First of the Patron's Name (ending with Driss, abruptly), plus the space, plus the (4-digit) Department (+ space again), is truncated after the first four characters of earthlink.com; the final count for that row, including spaces, is 40.   As long as **eart** is short for **earthlink.com** and no other, then this compression of the Patrons List will be fine. Only if the truncated email domains begin to resemble each other does this method of display begin to crumble as an identifying method.

Meantime, email addresses where the part after the @ (often called the email domain) matches the same part in the Library Contact Email Address will show only the email username (as in gblackbu, above) plus the @, with nothing after (e.g., gblackbu@, as shown above).

Here's the same list with just the **Name** and **Email** (no Department):

```
Berrada, Driss dberrada@earthlink [1056]

Berson, Alma [273]                           |  ← 40 char's

Bitton, Alain [765]

Blackburn, Geo gblackbu@ [1062]

Blank, Margot [278]
```

Even with no Department, the full **earthlink.com** domain isn't available (more would be available in the DOCLINE Patron Name field if the actual Patron Name---Berrada, Driss---were shorter!) at the end of the Berrada name line on DOCLINE.   On the other hand, George Blackburn's email domain, which is the same as our Library's, is easily retrievable from gblackbu@ (where the Email in the Patron List always omits the part after @ if it matches the real Local Library's email domain)with the default Library email domain assumed .

Billing Prefs Tab Local Preferences

The **Billing Prefs Tab** of the Local Preferences form adds the ability to set different values for various items relating to **Library and Local Invoices**, and will appear as follows:

Default Payment Method. Can be different for Library and Local. These are the values that are assigned when new Libraries, Patrons and Departments are created.

Cost Center on Invoices. This is the **Our Cost Center** value that appears with the return address at the top of an Invoice. Can be different for Library and Local. Can also be different for **Copy Services Invoices**; see below.

Separate Copy Service Invoice? In most cases you will want to have this box **unchecked**, so that Local Invoices will include both Copy Service and ILL charges in the same invoice.

If you leave this box unchecked, which means that Copy Service items will always be included with ILL items in Local Invoices, then the **Cost Ctr for Copy Service** value will <u>never be needed</u>; nevertheless, it's probably wise to enter a default Cost Center for your Library's local payments here anyway, if you have one, in preparation for a time when you might want to check the box in order to print a **Copy Service Invoice** for a particular Patron, Department or Cost Center. In most cases this value will be the same as the Local Billing Cost Center, but it's added here so that, in cases where there is a separate Cost Center assigned for **income derived from Copy Service** activities, you can enter that value for printing only on Copy Service Invoices. This is the **Our Cost Center** value that will be printed at the top of any Copy Service Invoice, whether Patron, Department or Cost Center.

If this box is unchecked, the choices on the **Menu Bar** under **Local Billing** for all three separate Copy Service Invoices/Reports will be disabled:
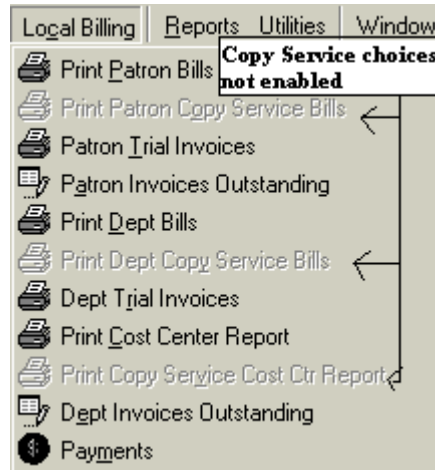
There will also be no Message Box question when printing a single Invoice from the **Local Billing Grid** as to whether you want to print a **Copy Service** or regular ILL Invoice.

If you will normally print Copy Service Invoices (including Cost Center Reports/Invoices) separately, then check the **Separate Copy Service Invoice? Checkbox**; this will allow you to choose whether or not to include a separate Copy Service Invoice for each Patron/Dept/Cost Center each time you run invoices:
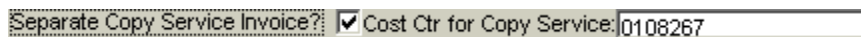
If this box is checked, you can decide for each invoice print whether or not to include Copy Service. Choices under **Local Billing on the Menu Bar** for **Print Patron Copy Service Bills**, **Print Dept Copy Service Bills**, and **Print Copy Service Cost Ctr Report** will also be enabled.

If the **Separate Copy Service Invoice?** checkbox is checked, you will also want to be sure that the **Cost Ctr for Copy Service** box includes some value, otherwise the Copy Service Invoices will have nothing in the Cost Center field for Patrons or Departments to remit to.

When you check this box, you are set up to first run **separate Copy Service Invoices** before running the normal Local Patron/Dept/Cost Center Invoice run. (Items already invoiced in Copy Service Invoices won't be eligible for any later Invoice run, because their Local Status will already be **InvDep**.) The default here is unchecked, which means that Copy Service items will be included in the same Invoice with ILL items.

If you specify the **Separate Copy Center Invoices?** Choice, in addition to the extra choices on the Local Billing Menu Bar entry, you'll also see a "**Print Invoice for Copy Service Only?**"

Message Box in the **Local Billing Grid** when you choose to generate a Patron/Dept Local Invoice (assuming that the list of items to be invoiced includes at least one Copy Service item):
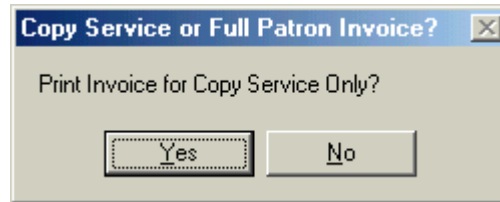
In any event, when the group of requests you have gathered to print via the Local Billing Grid **One Invoice Print** has no Copy Service items, you won't see this message box and the resulting invoice will include only regular ILL items.

Cost Ctr for Copy Service. The **Cost Center for Copy Service** is the **Our Cost Center** value that appears with the return address at the top of a Copy Service Invoice. Can be different from both the Library and Local Cost Centers.

Fed ID No. on Invoices. Can be different for Library and Local (this value can be used for messages other than the Federal ID number). A maximum of 25 characters here.

Make Check Payable To. How should the payment check be made out? Can be different for Library and Local.

Payment Terms. Usually something like NET 30 (for 30 days to pay) or PAYABLE UPON RECEIPT (never happens, as far as I can tell). Can be different for Library and Local.

Print HTML copies. This controls whether or not HTML versions of Invoices are generated when a printed copy is made. Check **Never** if you never send these HTML Invoice; check **Ask** if you want to see a popup message box each time; and check **Always** if you want to have an HTML Invoice automatically generated without asking permission.

If you check **Ask**, you will see the "**Also save each Invoice as an HTML file**" checkbox on the Print Invoices menu, but it will be unchecked, so that you'll need to check it for each batch run of Invoices. Ask will also cause the display of the "**Save a copy of this Invoice as HTML file also?**" message box when printing a single Invoice from either the Local or Library Billing Grids:
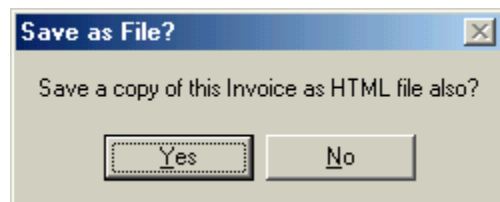
If you check **Never**, neither the above message box nor the checkbox on the Print Invoices form will appear. Checking **Always** will skip the message box (you're saying that you will always have clicked Yes if the box were shown), but will still display the checkbox on the Print Invoices form, although the default there will be checked, so that you'll have to uncheck it if you want to forego the HTML invoice print.

Suppress Invoice Box on Printed Invoices. This comes over from the old Billing Setup form and should be checked if your printer doesn't print a return address on Invoices but leaves a blank box instead.

Default Local Bill Type is Dept. This checkbox allows you to specify that your normal method of Local Billing is by **Department** (including **Cost Center** Invoices), rather than by Patron (which is the normal default). If you check this box then the Local Billing Grid will always come up with the **ChrgAsDept** column showing, and the default payments will also be **PaidDp**. The **default Invoice** will also be the Dept Invoice, although you can always print Patron Invoices by choosing the Patron Search first in the Local Billing Grid.

The **Local Billing Grid Ribbon Buttons** now include one for **Print Dept Invoice** (or **Print Patron Invoice**), which is exactly what it will do; there is no pause between the clicking of that ribbon button and the printing of the Invoice (unlike the situation for Library Invoices, where there is a pause, and which requires another button click to actually print the Invoice). **Local Billing Ribbon Buttons** now appear as follows:

Put Invoice Address above Return Addr. This checkbox will swap the normal structure of printed Invoices, where the Return Address appears in a box at the top, and the Address of the Library or Patron being billed just underneath that block. The main use for this option is for Libraries whose window envelopes have a window toward the middle of the envelope (rather than the usual lower left) or above.

As in many of the checkboxes in QuickDOC, if you hold the cursor over the 'Put Invoice Address' area you will see a brief Help comment (**ToolTip Help**), whether or not you are actually at that part of the form. The yellow help box below will always show help, but only with regard to the current item on the form.

The effect of checking this checkbox is the **swap the Invoice Address Locations**: Invoice Address at the top, Return Address below it, as illustrated in the Before and After graphic below:

In addition to this big switch, you can also fine-tune the location of the Address Block by using the Move Invoice Address Up values (see below), if necessary, but because the **Include copy of Invoice or Inv No.** line is already below the Invoice Address after the swap, you really have only the 1 line up choice (rather than 2).

Use Canadian Invoice format? Will use Bilingual (French/English) headers and labels on the Invoice sent to both Libraries and Local users. Item data will still be in English (unless it was entered in French under Add Borrow or Add Lend), since it's been imported from DOCLINE, and address information will be as entered in the Library record and in the Addresses Tab, above, but bilingual labels will be displayed on the printout wherever possible.

Because the bilingual labels will obviously take up more space than English only labels, there will be slight changes in the Invoice format: some labels, like the **Make Check Payable To** label, will show on two lines instead of one. In order to retain the general structure of the Invoice Header, in most cases, including that of the Make Check line, the label is moved up into what was a blank line and the contents of the field are displayed below.

Even with these changes, if you're using bilingual labels, you should try to keep the entries for **Make Check Payable To**/**Prière de faire le chèque à l'ordre de** and **Terms**/**Conditions** as concise as possible, since space here is limited.

Here's an example of the Library Invoice with Use Canadian Invoice format checked:

Invoice/Facture
01-Jun-03 to/au 30-Jun-03

Choosing the Canadian format prints bilingual tags and labels in most cases.

8-Sep-2003   Invoice No/No de facture: TNUTNK 0001   Page 1

Make Check Payable To/Prière de faire le chèque à l'ordre de:
Agoos Medical Library, Beth Israel Deaconess Med Ctr   Terms/Conditions: NET 30

Beth Israel Deaconess Medical Center   Tél: 617.632-8480
Agoos Medical Library   Fax/Télécopieur: 617.632-8316
One Deaconess Road   dyoung3@bidmc.harvard.edu
Boston, MA 02215

Because the bilingual format takes up more space, some entries may use two lines instead of one in the English only format.

Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement
University of Tennessee Medical Center Demo Enviro
Preston Medical Library ILL Dept
1924 Alcoa Highway Box U111
Knoxville, TN 37920-6999

Address information and bibliographic information will follow whatever format you have entered in the Library or bibliographic record.

Req No/No de demande	Year Title/Année Titre	Citation/Référence	Patron/Usager	Chg/Frais	Date fld/d'envoi
2938	2003 Breast cancer research (Print)	5(2):R18-24	Docline 1.6	$11.00	20-Jun-03

Total Items For/Total des requêtes pour TNUTNK: 1   Total Charges/Total des frais: $11.00

Bilingual HTML Invoices are even more constricted in space, since some of the fonts used in the HTML format take up more space. Because HTML Invoices aren't mailed, though, the placement of the Address and Return Address isn't as critical as in a normal Invoice.

Invoice/Facture
01-Jun-03 to/au 30-Jun-03

10-Sep-2003   Invoice No/No de facture: TNUTNK 0011   Page 1

This line may word wrap on the printout, justified to the left.
Make Check Payable To/Prière de faire le chèque à l'ordre de:
Agoos Medical Library, Beth Israel Deaconess Med Ctr   Terms/Conditions: NET 30

Beth Israel Deaconess Medical Center   Tél: 617.632-8480
Agoos Medical Library   Fax/Télécopieur: 617.632-8316
One Deaconess Road   Email/Courriel: dyoung3@bidmc.harvard.edu
Boston, MA 02215

Our Cost Centre/Code budgétaire: 0108266

This line may word wrap on the printout, justified to the right.
Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

University of Tennessee Medical Center Demo Enviro
Preston Medical Library ILL Dept
1924 Alcoa Highway Box U111
Knoxville, TN 37920-6999

When a Bilingual HTML Invoice is printed, some lines may be printed on more than one line, even as they show (as here) on a single line. This is a result of how the printer renders table data, and there's not much you can do about it. Because it is Table Data, though, the result will be fairly neat and presentable, however the printer may format the printout.

Invoice Total/Montant total facturé: $11.00

Req No/No de demande	Year/Année	Title/Titre	Citation/Référence	Patron/Usager	Chg/Frais	Date fld/d'envoi
2938	2003	Breast cancer research (P	5(2):R18-24	Docline 1	$11.00	20-Jun-03

Local Patron/Dept and Cost Centre Invoices have a similar format.

Add'l Comment entry on Invoices. Room to add a brief comment (up to 75 characters long) that will print at the bottom of the Library or Local invoice. Hold the cursor over this box to see the full entry as a Tool Tip; here's what shows when the cursor is placed over the Library Billing comment (left box) below:
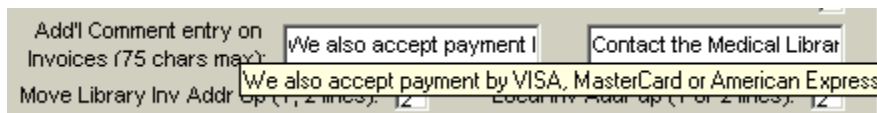
Add'l Comment entry on Invoices (75 chars max):	We also accept payment l	Contact the Medical Librar
We also accept payment by VISA, MasterCard or American Express		
Move Library Inv Addr Up (1, 2 lines): 2		Local Inv Addr up (1 or 2 lines): 2

Invoice comment lines appear at the end of Invoices, after the Totals line, with a horizontal line separating the comment from the Invoice section. Here's an example from a Library Invoice (Local Invoice Comments are displayed in exactly the same way):

The comment line on the Library Invoice appears just below the Totals line, separated by a line.						
				Include copy of Invoice or Inv No. with payment		
Req No.	*Year Title*		*Citation*	*Patron*	*Charge*	*Date Filled*
2886	2003 J clinical investigation		May;111(10):1505-18	Docline 1.6	$11.00	20-Jun-03
2938	2003 Breast cancer research (Print)		5(2):R18-24	Docline 1.6	$11.00	20-Jun-03
Total Items For TNUTNK: 2				**Total Charges:**	**$22.00**	
		We also accept payment by VISA, MasterCard or American Express.				
If there is no comment saved in Library Billing Preferences, the horizontal line is also omitted.						

The comment will be printed at the center of the page, just under the horizontal line. The limit of 75 characters is set to ensure that there will be enough room for a cleanly centered line (the comment above is 62 characters long), no matter how many uppercase or other wide characters are used. If there is no Additional Comment Line, the horizontal line will not be printed.

Move Invoice Address Up (1, 2 lines). If your Invoice Address doesn't quite fit the window of your window envelopes, then use this small adjustment to bring the address lines up. Two lines is the maximum move, alas.

Move Invoice Address Up 1 line will move the **Bill To address** up one line from the default position. This is accomplished by eliminating the blank line between the Invoice Dates and the line with the Invoice Number in the middle. Both Library and Local Invoices with a 1 line move up will appear as follows:

Library Invoice with Move Address Up 1 line checked.	Invoice	No space between Dates and Inv No. line.
	01-Jun-03 to 30-Jun-03	
22-Sep-2003	**Invoice Number: TNUTNK 0001**	**Page 1**
Make Check Payable To: Agoos Medical Library, Beth Israel Deaconess Med Ctr		Terms: NET 30
Beth Israel Deaconess Medical Center		Tel: 617.632-8480
Agoos Medical Library		Fax: 617.632-8316
One Deaconess Road		dyoung3@bidmc.harvard.edu
Boston, MA 02215		
		Our Cost Center: 0108266
Moves Return Address below up 1 line for Window Envelope.		Include copy of Invoice or Inv No. with payment

Move Up values are ignored for HTML Invoices, since these are delivered by email and won't need a window envelope.

Move Invoice Address Up 2 lines will move the **Bill To address** up two lines from the default position. This is accomplished by eliminating the blank line between the Invoice Dates and the line with the Invoice Number in the middle and also moving the **Include copy of Invoice or Inv No. with payment** line from just above the **Bill To address** to a line just below it and just above the line that separates the header from the column headers of the Invoice.

N.B., A two-line move up after the **Put Invoice Address above Return Addr** checkbox has been checked is the same as a one-line move, since the "Include Copy of Invoice" line is always beneath the Invoice Address line after the address blocks are switched.

For Library Invoices, where the **Our Cost Center** value may not be as important, you can also generate an easy move up of about a half a line by not including a Cost Center value for Library Invoices. Weigh this small move up against the necessity (or lack of it) that the payer should know your Cost Center when making payment and eliminate it if it's not necessary and you want that extra move up for the Bill To address.

A typical Invoice (Local or Library) with a 2 line move up will appear as follows, with both the removed lines indicated:

To see how a Canadian (bilingual) Library Invoice with a setting to move **Bill To address** up 2 lines might look (the Local Invoices are similar), here is an example:

You can also use the settings on the Addresses Tab to change where the recipient's address appears in a window envelope. If you eliminate a line of the Return Address (by moving a second street address line up into the first line, perhaps), it's the same as moving the Library Invoice Address up one line. If you add a second street address line, it's the same as pushing the Library Address down one line. This technique is fairly limited, though, since most address lines (except for the second street address) will be used, even if empty, for phone, fax and email information.

Email Tab Local Preferences

The **Email Tab** of the Local Preferences form is a placeholder for future additions to the program:

Libraries

Records for Libraries are held in the QuickDOC.MDB database primarily in the **tblLibs** Table, with associated records in **tblLComms**, **tblLibCharges**, **tblLibPmtTypes**, **tblLibsGroups** and **tblLibsOldSHID**. Lists of Library records are available in a column on all Grids, as well as through the Libraries List.

The Libraries List

Displaying Libraries

Records for Borrowing Libraries are primarily accessed through the **Libraries List** (on the Toolbar) as well as under "**Lookup**" on the **Menu Bar**, under Libraries. The Libraries List also pops up in other places, such as when you're adding a new Loaned Item, so that the Library can be chosen from the list.
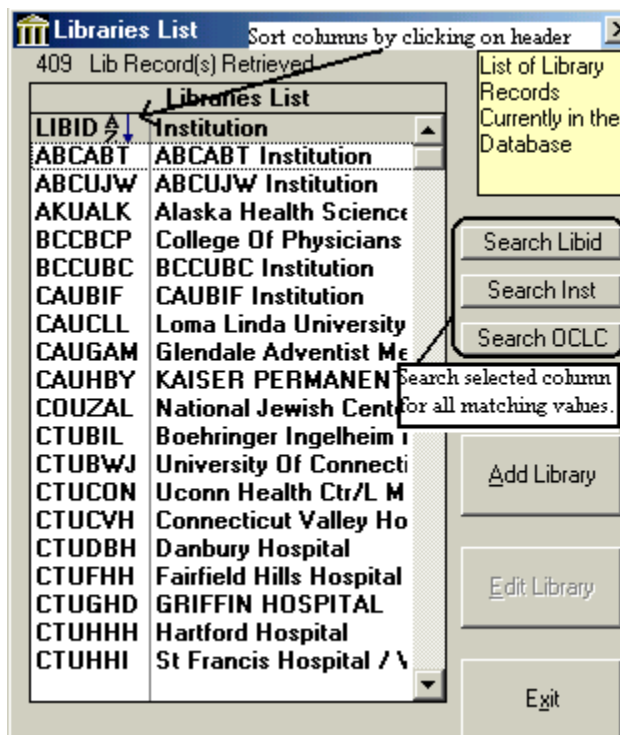
The list shows the libraries in your file alphabetically **by LIBID**, which is the default sort order. Start typing the first few letters of the LIBID to jump ahead on the list, or use either the Down Arrow key or the scroll bar at the right of the list to navigate further. (**XXX… LIBIDs**, by the way, result from imports from old QD for a Library not found in DOCUSER; these can be assigned a standard DOCLINE LIBID later, should that become necessary, or the LIBID can be cast in standard DOCLINE format, once it's determined that that value is not assigned to a true DOCLINE Library.). If you hold the cursor over a long entry, the tool tip will appear with the full name visible.

As an item is selected (either by clicking on that line or by pressing Enter after moving down the list until the library you want is highlighted), the **Edit Library Button** is enabled (to switch from Edit Library to Add Library, click '**Clear Choice**'; the List will then be set to the topmost entry and the **Add Library Button** will be enabled).

Searching for a Library

You can search the Libraries List for specific matching entries by clicking on one of the search buttons. You can search the LIBID column (which should always match the NLM LIBID if there is one), the Institution column, and the OCLC Code column. When you click the appropriate button, an input box will pop up. Enter any amount of characters you want matched and the list will then display only those records where that matching group appears anywhere in the field.

To choose or edit a Library, click on the line that contains the entry you want: the **'Edit Library' Button** will be enabled and that Library will be your current choice.

To **reset the Libraries List** after a search to its full number of entries, click once on any item in the list to highlight it, and then click the Clear button or click the header at the top of the LIBID column to start the sort on that column.

Sorting the Libraries List

You can sort the Institution or LIBID columns in ascending or descending order by clicking on the header at the top of the column.

Deleting Libraries

Click the Edit Library button to bring up the complete Library Form, and then click the **Delete Library button** on the lower right of the General Tab.

Editing Libraries

Click the Edit Library button to bring up the **Library Information Form**. .   Double-clicking a line is the equivalent of selecting it and clicking the Edit Library Button, and will also open the Library Information Form.

Library Information Form

The Library Information Form consists of five tabbed forms, located by clicking on the Tabs at the top of the form or by pressing Enter (or the Down Arrow) in the last control on the previous form, except on the Groups Tab, which is the last Tab visible. Pressing an Up Arrow from the topmost control of any form except the General Tab will move back to the previous Tab.

Library Information Form – General Tab

The General Tab presents general Library information, along with a snapshot of values set on other Tabs:

The **General Code for This Library** and the **NLM LIBID** should be the same. Check DOCUSER to see if the Library for which you are creating a record has a **DOCUSER Code**. DOCUSER is searchable in DOCLINE. Most libraries that have had activity with the National Library of Medicine will have DOCUSER Codes, even if they are not, and never will be, DOCLINE users. If the Library you are creating has no DOCUSER entry, you can create a General Code. Use six characters and try to avoid anything that might be an actual DOCUSER entry (NLM LIBIDs use the state or province abbreviation for the first two letters, then one letter for country, then three letters for the SERHOLD ID).

The **RLIN Code** box is for Libraries that are members of that system. The **OCLC Code** box is for users of that system. And the **Other (Library) Code** box is for some other local designation. Any of these boxes (except for the General Code) can be left blank of they don't apply.

Add values for **Institution Name** and **Library Name** here, if needed. The EFTS, ISO and Charge Profile information displayed on the first Tab is to permit quick lookups without moving to a distinct Tab. If you want to make a change to these values, move to the Tab specified.

Clicking the **Clear/Reset This Record on the Edit Library Form** will blank out the entries for the current Library and prepare for adding a new Library.

Library Information Form – Address Tab

Because DOCLINE 2.0 and later displays both the **Library Delivery Address** and the **Library Billing Address** on Receipts, which may be different addresses at a single institution, QuickDOC saves both of these addresses and uses both when creating a new Library record.

The labels are similar except for the **Dept, Mail Stop** field, which will often contain the Delivery Address Library Name field, unless there is an **Accounts Payable** or other dedicated Billing Department.

The Address Tab will appear as follows:

Notice that the Dept, Mail Stop line in Billing includes not just the **Mail Stop** but also the **Library Name** (which has its own field in the Delivery Address), with the Mail Stop added at the end. An alternate choice might have been to use the Mail Stop as the first Address Line and the "One Deaconess Road" as the second, but tests show that using the second address line may cause problems with window envelopes, so my recommendation is to use only the one address line unless it is utterly impossible to do so.

Library Information Form – Comms Tab

The Comms Tab has local communications information. The phone, fax and email values are those imported from a DOCLINE request, where available.

The Preferred Delivery you choose here will also function as the **Default Preferred Delivery Method**. The fields in the ISO ILL Information box aren't used until the ISO ILL Implementation.

Library Information Form – Charges Tab

The Charges Tab contains information about charges and payment options. Most of the information kept here is for libraries other than your own, but **the Charge Profile you select in the record for your own library** will function as the **Default Library Charge Profile** that is applied to newly created libraries**.**

This information is stored in **tblLibPmtTypes** in QuickDOC.MDB and is associated with the main Libs Table by a matching LibrID field (it matches the Library General Code). The matching field name is **LibPmtLibrID**. There is also an unrelated unique key field, **LibPmtID**, which will allow for multiple Library Preferred Payment records at some later date.

Library Charge Profiles determine the default charge that is applied on initial filing of activity, both Borrow and Loan, with another library (although the default can, of course, be changed on any individual item). Charge Profiles must be assigned to each Library (they will otherwise be assigned the Default) and are filed with the library record.

Preferred Payment Method is the method by which this Library normally prefers to pay. It reveals a dropdown Combo Box with whatever values are in the **Payment Methods** (**tblPmtMethods**) Table of QuickDOC.MDB.

This value can also be left blank (you should see an empty value at the top of the dropdown list when it's first opened) as opposed to the usual (None) value, so long as the empty record is also present in tblPmtMethods (don't delete it by accident or design). The field name is **LibPmtMethod** and allows 20 characters.

Your own Library's **Preferred Payment Method** combo box will also set the **Default Library Payment Method**, which is used as the default when creating new Libraries on the fly. The Preferred Payment method assigned to other libraries will be used to determine how they are billed. In general, though, items marked **EFTS = Yes** will be billed through EFTS, items marked **IFM = Yes** will be billed through IFM, and anything else will be eligible for Invoicing.

PO Numbers may be entered in the Library Account Number field

You can enter a PO Number that will be printed on your Library Invoices to a specific Library by entering it in the Library Account Number field on the Charges Tab. QuickDOC will then check the **Library Account Number** field on each Borrowing Library's record when printing Invoices 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.

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).

The **EFTS payment supported** should always be checked for your own Library if you want the incoming Receipts from other libraries to show the EFTS status when they come in marked "**Epayment**." If this box is left unchecked, then no incoming Receipts will be marked automatically as EFTS. It should also be checked in the record of each Library participating in EFTS. If you uncheck this box in any library record, that library's items will show **EFTS = No** even if they arrive with the proper "Epayment" notation at the top.

AutoUpdate EFTS Choice

In earlier versions of QuickDOC, once you indicated that your library was an EFTS user by checking **the EFTS Payment Supported checkbox** on the **Charges Tab** of **your** library record, QuickDOC would automatically change the EFTS value to Yes for any Library whose request comes in to you with an **Epayment** notation at the top. The rationale here was that this would be a time-saver for newly-joining EFTS members: they could check their own checkbox and then have other EFTS members in effect update themselves during their next Receipt.

This caused problems, however, for Libraries who had special Billing arrangements with other libraries that were also EFTS members. These records kept being changed back to **EFTS = Yes**

when they wanted it kept at **EFTS = No**. QuickDOC therefore now presents a Message Box choice when you change your own EFTS value to Yes:
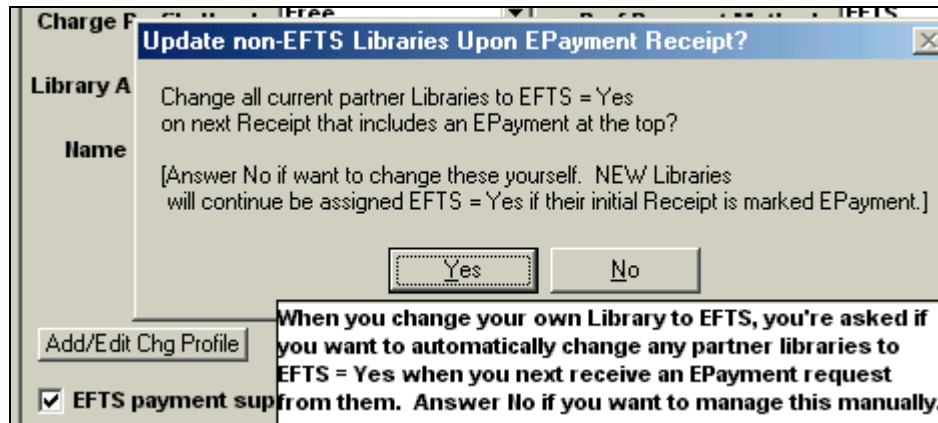
Answering No here will **suppress that EFTS check for Library records on Receipt of a request marked Epayment**. Only **newly-created Library records** will automatically record the Library as EFTS = Yes if the first Receipt from that Library is an Epayment.

Most libraries will choose Yes. You can also change this value at any time using the **Check EFTS=Yes on 'Epayment' Receipt** checkbox on the first Tab of the **Local Preferences form**, which is probably the easiest way to manage this value. The message box method is retained only for the convenience of making the change at the same time you first update your EFTS Payment Supported value to True.

If your Library's EFTS payment supported box is unchecked, then the **EFTS column** in all **Lend Grids** will be **hidden by default**.

The **IFM payment supported** checkbox for your library determines whether any item will be **marked IFM = Yes**. If your IFM = Yes, and the Borrowing Library's IFM = Yes, then all Lends to that Library will default to Yes. A library may have both EFTS and IFM checked, but since only the EFTS transactions are automatic, any payments made with IFM should be processed first, before creating the EFTS Upload file.

If your Library's IFM payment supported box is unchecked, then the **IFM column** in all **Lend Grids** will be **hidden by default**.

If an item is marked either <u>EFTS = Yes</u> or <u>IFM = Yes</u> in the Lend Item backfile, it is skipped during automatic Invoice creation. See the Library Billing chapter for more information.

The **State/Province Sales Tax** box isn't implemented yet and will have no effect.

To **edit or add a Library Charge Profile from the Library Information form**, click the **Add/Edit Chg Profile button** to bring up the **Library Charge Profile Information** form.

Library Charge Profile Information Form

Name	Borrow$	Loan$	FaxB	FaxL	RushB	RushL	OtherB
10Lib	$10.00	$10.00	$0.00	$0.00	$0.00	$0.00	$0.00
15Lib	$15.00	$15.00	$0.00	$0.00	$0.00	$0.00	$0.00
B10L10F0R0	$10.00	$10.00	$0.00	$0.00	$0.00	$0.00	$0.00
B11L11F5R0	$11.00	$11.00	$5.00	$5.00	$0.00	$0.00	$0.00
B1L1F0R0	$1.00	$1.00	$0.00	$0.00	$0.00	$0.00	$0.00
B3L3F0R0	$3.00	$3.00	$0.00	$0.00	$0.00	$0.00	$0.00
B4L4F0R0	$4.00	$4.00	$0.00	$0.00	$0.00	$0.00	$0.00
B6.5L6.5F0R	$6.50	$6.50	$0.00	$0.00	$0.00	$0.00	$0.00
B6L6F5R0	$6.00	$6.00	$5.00	$5.00	$0.00	$0.00	$0.00
CISTI	$14.00	$14.00	($4.00)	$0.00	$0.00	$0.00	$25.00
Free	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
NLM	$9.00	$9.00	$3.00	$3.00	$0.00	$0.00	$0.00

Library Charge Profiles can be named in any fashion that makes the most sense locally. In the case above, the name is an abbreviation for the main values contained in the profile: $11 to borrow from this library; $11 to be charged for loans to this library; a **Fax Surcharge** of $5 for both Borrows and Loans, and nothing in the **Rush Surcharge** value. Each Profile may also have a **Free Items Before Borrow (or Loan) Charge begins**, which QuickDOC computes on the fly, adding the base charge only after the free items total has been reached (currently set on a Calendar Year basis, but a Fiscal Year setting will be forthcoming). There are Other and Special surcharge boxes, but these are reserved for future enhancements.

To **Add a Charge Profile**, first click the Clear Form button to clear out any old values, then begin typing in the new Charge Profile's values. Once a Charge Profile is created, it must then be assigned to individual Libraries whose charges match that profile. In most cases, a profile can be applied to a number of libraries, so that when you change your charges at any point, making the changes here will cause them to apply to any library with that Charge Profile in future activity.

(I'm not sure what causes this, but it's clear that we should **restrict the names of all Charge Profiles** to **alphanumeric characters**. The QuickDOC.MDB database seems to choke when it's asked to assign charge profiles like **$11** or **12/15** to libraries, patrons or departments. Just to make life easier, try to use ONLY alphanumeric characters when assigning a Charge Profile Name.)

There may nevertheless be cases where a Library's Charge Profile is applicable to that Library only. In those cases, you might just name that profile after that Library's LibID, but don't forget to assign it in the Library record, on the Charges Tab, as well.

You can also **edit or add a Library Charge Profile from the Setup Menu**:
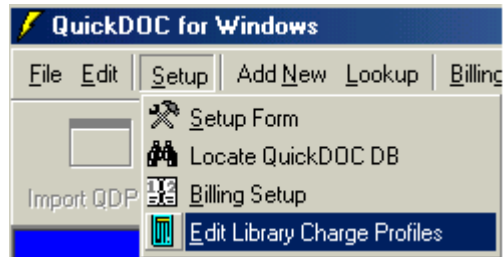
Library Information Form – Groups Tab

This Tab is used in other Library records to assign various Groups (called General and Special in old QD). You can add this library to a Group by clicking on the Group in the box to the left and then clicking the right arrow to move it over. New Groups can also be added here.

Add Libraries

The Add Libraries form is the same as the Edit Libraries form, except for the **DOCUSER lookup capability built into the LIBID text box.** If you type in just the first two letters of the state or province of the Library whose record you want to create, you'll get a list of records from DOCUSER that begin with that state or province. The list is sorted in order by Institution Name, so you may need to scroll down, and perhaps try a different name if your first choice isn't found. Grab the right edge of the form and stretch it out if you want to see more of the Institution Name. There may also be two entries for a single institution in those cases where they have more than one entry in the **DOCUSER List**, but this quick lookup should be helpful in most cases.

You can also do a search on the DOCUSER List, using any part of the LIBID or Institution Name, by clicking the appropriate search button.

When adding a new Library record, **use the NLM LIBID as the General Code when that is possible** (the library has a record in the NLM DOCUSER file). You can also double-check the current DOCUSER file on DOCLINE to get the latest information.

Standardizing on the NLM LIBID as the General Code will prevent confusion in the future, should you begin receiving requests from that Library on DOCLINE. When it receives that first item on DOCLINE, QuickDOC will create a new Library Record under that LIBID (assuming it doesn't yet exist). This would give you two records for that library if you had used another code for the General Code. To recover from this duplication, you can transfer activity from the old Library record to the new one.

Transferring Library Activity

To transfer activity from one library record to another, use the following steps:

1. Compare the old Library record to the new, adding any unique data from the old record to the new record on the appropriate Tab.

2. Edit the old record, changing the General Code field to match the new code and pressing Enter.

3. A message box will appear (as illustrated here for a transfer from MAUNEN to MAUBET):
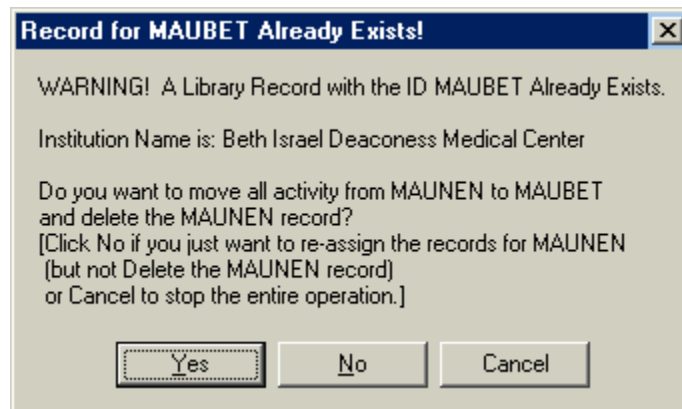
4. Click Yes if you want to move all activity in the database now assigned to MAUNEN to the MAUBET record and delete the MAUNEN record.

5. Click No if you want to move all activity in the database now assigned to MAUNEN to the MAUBET record but keep the MAUNEN record for future use.

6. Click Cancel to back out of the entire deal.

If you choose either 4 or 5, above, all the activity assigned to MAUNEN in any table within QuickDOC.MDB will be assigned to MAUBET. This is a quick way to **Merge Library Records**.

Printing a List of Libraries

Although there's no built-in **Libraries List Report**, it's possible to construct one of your own in the following way:

1. Click Lend (or Borrow) and search the Lend Item (or Borrow Item) Backfile for ANY value (it doesn't matter, as long as SOMETHING shows up in the Grid).

2. Then click File on the Menu Bar, then Export. This will export whatever values you selected in Lend (or Borrow), but Export will also ALWAYS export the complete Libraries Table into a file called **Libs.txt** in the Export folder just beneath wherever your database is located.

3. You can then import this .txt file into Excel (or other program) and decide then how to format the fields, which fields to include or exclude, and how to print it.

Lend Function

Lend Information in the Database

Information on items loaned is held primarily in the **tblLendItems** Table in QuickDOC.MDB. Associated bibliographic information for any item is held in the **tblLendBibs** Table. Information on Lend activity is displayed in a Grid format, available by clicking the **Lend button on the Main Tool Bar** or by clicking Lookup on the Menu Bar and choosing **Items Loaned**.

Date Format Used in Searching

In order to evaluate dates uniformly, QuickDOC uses a Short Date format based on the Regional Settings of the machine on which it is being run (e.g., 23-Sep-2001 will display as 09/23/2001 in English – U.S. format; as 23/09/2001 in English – Canada format, etc.). Dates displayed in most cases will use this format.

(Because of an idiosyncracy of SQL Queries on Access-type databases, all SQL Search Dates are re-formatted to English – U.S. for search purposes only, but this will have no effect on the local format used or on the format displayed in QuickDOC. It will be transparent to the user.)

 Dates displayed in **Calendar Date Boxes** for data entry will use the Month Day, Year format (e.g., Sep 23, 2001) so as to skirt the date format issue entirely. These controls have some degree of built-in intelligence, so that when you begin typing the month name it will often complete all three letters if there is only one possibility---as in Sep, above). You can check the local settings for your machine in the Control Panel, under **Regional Settings**.

Lend Grids

Lists of items requested are normally displayed in Grid format, showing either current requests received and in process or those requests that have already been processed and either filled or rejected (the Backfile), according to whatever limits are set. Searches can be limited by Date and by choices on the ribbon bars. The **Items Received Grid** is normally the first one shown, but you can toggle back and forth between Items Received and the **Lend Item Backfile Grid** by clicking the ribbon button with the white background just above the Search Box. In addition, multiple deletes and global column changes can be accomplished on any of the Grid views**. Search Dates** selected are displayed (in local date format) in the box just above the Grid to the right, as well as in a Tool Tip when the mouse is held over the **By Dates button**.

Request Number Searching in Lend

In all **Request Number searches**, whether made on the Items Received Grid or the Lend Item Backfile Grid, if a part of the request number is entered in the Text Search Box (the box next to "Containing" below), then ALL records meeting the search criterion are retrieved.

If the Text Search Box is left blank, then ALL Received Items will appear in the Items Received Grid, and ALL Items for the selected Date Range will appear in the Backfile Grid. This broad-based response is unique to Request Number searching; all other searches are limited by the criteria of the Grid used and by the range of Dates Selected.

An exception to the 'All Dates' rule for Request Number is made for searches where there is something entered in the Search Box and the **Search Criterion** is **Beginning With**; **Beginning With Request Number Searches** will adhere to the **Dates currently set for searches**. This is intended to permit the searching of various non-DOCLINE items, entered manually with all request numbers beginning with a certain phrase or letter, within the Dates specified. (E.g., if you

enter all WEST CAMPUS items with a number beginning with WEST, they will be retrieved in a Date Search properly with a search strategy of '**Beginning With**' WEST.)

Items Received Grid

All items that have not yet been acted upon will appear in the Received Items Grid.

The Items Received Grid will be **the first Lend Grid to appear during each session**. This is to ensure that the items still marked as 'In Process' are given at least a brief glance during each session. Rows where the **MAX COST is less than CHRG** will be highlighted in red. A dropdown box with ALL Libraries in your Libs Table is available in the Borrower Column by clicking the down button (for some reason it takes three clicks the first time to drop the list down, but only one thereafter). Fields with data that may be wider than the width of the column they reside in will show the complete field information as a Tool Tip when you move the Mouse Pointer over that cell (as in "Biochemistry" above).

Unlike the demonstration case above, the **Items Received Grid should show ONLY current requests not yet processed**. Once an item is updated, either on DOCLINE or manually, it will disappear from this listing and be available in the Lend Item Backfile Grid. If an item stays here more than a day or two after it's been updated on DOCLINE, then the update action may have been lost. In that case, record the update action here by manually changing the Status value to "Filled" (or "Not Filled" for a rejected request). The Received Date column should never have a value older than a few days before.

You can toggle back and forth between these two Grids using the Ribbon Button with the white background and blue letters. In the above Grid, clicking the "**Go to ALL Lend Items**" button will switch to the Lend Item Backfile Grid.

Rush and Urgent Patient Care DOCLINE Requests

DOCLINE 2.7 introduced 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 will now look for these words as well when importing data (screen shots below are from NLM 2.7 examples).

QuickDOC versions earlier than 2.1.7 cannot import these Type and Form values on Rush and Urgent Care requests.

Current Lend **Rush requests** (those just **Received**) are 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.

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.

Bill via EFTS only Requests

DOCLINE 2.7 also changed 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:**" for those Libraries as well as the usual "**Bill to:**" toward the bottom of the request.

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.

Borrowing Library Charges – How and when are they computed?

The charge assigned to the item is calculated, based on the **Library Charge Profile** of the Library sending the request, on first import into Items Received. It isn't automatically re-calculated thereafter unless either the **Delivery Method** or **Rush** value changes. If you change a Library's Charge Profile, the new designation will take effect only on new requests; existing charges will be unchanged.

But even existing item charges will be determined by the new profile if any of the signal values (Delivery Method or Rush) are changed, causing a re-calculation using the new Charge Profile. You can test this by changing a Library's Charge Profile, then changing the Delivery Method on one of that Library's items, saving changes and then changing the Delivery Method back to its original value. The new charge profile will determine the new value (assuming there is a difference in value for that Delivery Method between the two Profiles). And it's always possible to change the Charge value directly, by double-clicking into the **Chrg** field and entering a new charge; this new change will stick unless, of course, a later change in Delivery or Rush causes a later re-calculation.

Lend Backfile Grid
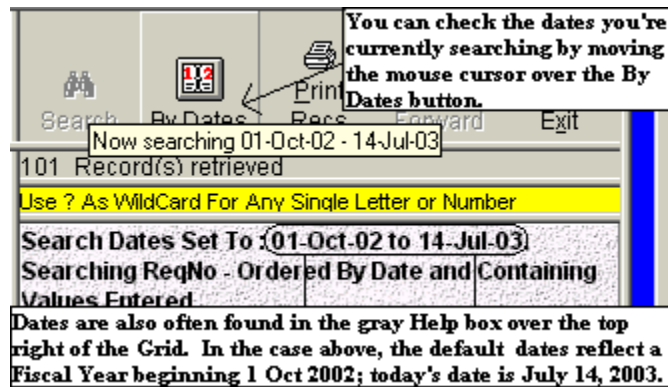
All items that have been acted upon, either Filled or Not Filled, will appear in the Lend Backfile Grid. Initially, the **Date Range for searches** will depend upon whether you're using a **Fiscal Year** or **Calendar Year** Start Date.

3.   If the Start Date is equal to Jan 1st (Calendar Year) then the **Grid's default begin date** is either:

   a.   **If today's date is before June 30th**: the display would begin at the first day of the month 180 days ago, e.g., on June 23rd the grid would start the display with December 1st of the previous year or,

   b.   **If today's date is July 1st or later**: the display would begin at the beginning of the current year, January 1.

4.   If the the Start Date is later than January (Fiscal Year), then the **Grid's default begin date** is either:

   a.   **If today's date is later than the Fiscal Year Start Date**: the display will begin at the beginning of the current year, January 1 (e.g., if the

FY Start Date is Oct 1, and today's date is November 23rd, the display would begin at 1 January of the current year).or,

b. **If today's date is earlier in the year than the Fiscal Year Start Date**: the display will begin at the <u>Fiscal Year Start Date in the last calendar year</u> (e.g., if the FY Start Date is Oct 1, and today's date is June 23rd, the display would begin at 1 October of the previous year).

Current search dates are often shown in the gray box just over the top right of the Grid. Current search dates are also available as a Tool Tip when you let the Mouse Pointer hover over the **By Dates Button** for a second or two:

Excluding Not Filled Items from Items Retrieved

In the Lend Backfile Grid, **Not Filled Items** are usually **included** in the records retrieved, except when a **Search By Status of Request** search specifically indicates that a certain status only is expected (e.g., a search for **Status Equals Filled** will not, by definition, include Not Filled Items).

You can specifically exclude Not Filled Items from the records retrieved by checking the **Exclude Not Filled Items checkbox**.

The same search, run with the checkbox unchecked, will include Not Filled requests along with others retrieved using the criteria specified.

1279 Record(s) retrieved
Use ? As WildCard For Any Single Letter or Number

Search Dates Set To : 01-Jan-02 to 29-Sep-02.
Searching ReqNo - Ordered By Date and Containing
Values Entered.
☐ Exclude Not Filled Items

mber						
S Recd		Acted	Status	Deli	Ru	Source ▲
1/2/2002		1/2/2002	Paid	Mail	No	DOCLIN
1/2/2002		1/2/2002	Paid	Mail	No	DOCLIN
s 1/2/2002		1/2/2002	Not Fill	NOT	No	DOCLIN
1/3/2002		1/3/2002	Filled	Mail	No	DOCLIN
1/3/2002		1/3/2002	Not Fill	POR	No	DOCLIN

Since the Items Received Grid, by definition, won't include items with a Status of Not Filled, the Exclude Not Filled Items checkbox only appears in the Lend Backfile Grid.

As with all Grids, the Ribbon Buttons just above the Search Text Box are used to stipulate a common search type: Request Number, Library, EFTS, Charge and Status.

The total number of **records retrieved by a search** is displayed in the space just beneath the By Dates Button.

The **Name of the Grid being used** is always at the top left of the form (Lend Item Backfile, above). A **Description of the Grid's Search Results** appears in the middle of the blue Grid Header ("All Lend Items – By Request Number" in the case, above). Clicking any of the column headers exposes a **column context menu** for that column, with choices for Show All Grid Columns, Global Change, and Sorting A-Z or Z-A.

Selecting Grid records

You can select and delete a batch of Grid records by using the **Record Selector button** at the left of each row to select the row (or rows). Selected rows are highlighted in blue, as shown in the illustration below:

In the view above, **highlight rows you want to process by clicking their Record Selectors** (the buttons on the left column). To **select more than one record**, hold down the Ctrl key while clicking, or press the shift key to **select a range of records** from the first record selected to the end of the group you want to delete. To select ALL Records in the Current Grid, you can simply click the topmost button over the Record Selector column (it has a small, inverted pyramid as an icon), and you will notice that all rows in the Grid turn blue.

Setting the Default Date for Batch Processing

Unless you want the **Default Process Date** to be Today's Date (the default), select the Date you want applied to all items in the batch by clicking the 'Set Default Date' button. Use the Date Box or the Calendar to choose the Default Process Date. This is the date that will be applied to all items selected when each is Marked Filled or Marked Paid, appropriate.

Once you've selected the Default Process Date, make sure it's registered by either pressing Enter (if you've been entering it by typing in the date box) or by clicking the "Set Default Date" button again. The current Default Date is always available as a Tool Tip if you place the cursor over the button, as above. Once the Date is satisfactory, click the 'Mark Filled' or 'Mark Paid' button, and all records selected will be processed, one-by-one so that any database relationships can also be updated.

Marking Filled Lend Grid records

Once you've selected the records to update, with the proper update date, you can mark all selected records to Filled by clicking the **Mark Filled Button**. Only items still marked as Received will be affected. Since DOCLINE items updated to Filled online should be registered here automatically, you won't have to use the Mark Filled batch method very often. But in cases where the online update didn't get through to update the database, this method can also be used as a mouse-only check-in method:

1. Click the Record Selector next to the item you want to mark Filled;
2. Change the Default Date if necessary;
3. Click the Mark Filled Button to record the change;
4. Repeat for any other manual check-ins.

Marking Paid Lend Grid records

This is useful for batch processing items you've filled for other libraries where you're using something other than an Invoice or EFTS Upload to bill them; this can be instances where the libraries send along coupons to pay for the service, or where credit is given for reciprocal activity between two libraries.

Once you've selected the records to mark to paid, with the proper date of payment set in Default Update Date, you can mark all selected records to Paid by clicking the **Mark Paid Button**. The item(s) will be filed away as Paid, with the charge equal to that in the CHRG column, using **payment method Other**, with the note "DOCLINE Request."

For the reciprocal Library, you might want to use the **Credit Payment Method** instead of Other. Use the Payments form for this, rather than the Record Selector batch method. The easiest way to get to the Payments form is to click in the Status cell for that row (it currently says Filled), then click the **To Pmts Button** that will appear where the Forward Button was. This will bring you to the Payments Forms, with much of the information automatically filled in. Just change the Payment Method to Credit and add the payment.

Only items marked as Filled can be changed to Paid. If you have an item marked Invoiced or Uploaded to EFTS or Paid, you must first delete the Invoice, etc., to restore it back to Filled before proceeding. Use the **Library Billing Grid** to make these changes.

Deleting Lend Grid records

Once you've selected the records to delete, you can delete that batch with the **Delete Records button**. Records marked **'Paid'** or **'Uploaded'** or **'Invoice'** will not be deleted in this batch process. They must first be marked back to **'Filled'** so that any related Invoice or Payment table information can be properly updated as well. Use the **Library Billing Grid** to make these changes.

Global Updates of Lend Grid Columns

Perform **Global updates** by first editing the topmost record of a column where you want all the records to have the same value. Once the top record has the correct value, perform the Global change by left-clicking the header at the top of the column (such as "**Chrg**" above) to get the Column Context Menu:

Choose "Global Search" from the list. The column will be highlighted and a message box will give you a chance to back out, if necessary.

Global Column Change of Charge Values To Match Top Value? ⊠

⚠ Ready To Change All Charges In This Column
To Match The Charge Value In The Top Row. [Current Top Row Charge Value is $11.00]

All Charges Will Be Changed To $11.00.

| OK | Cancel |
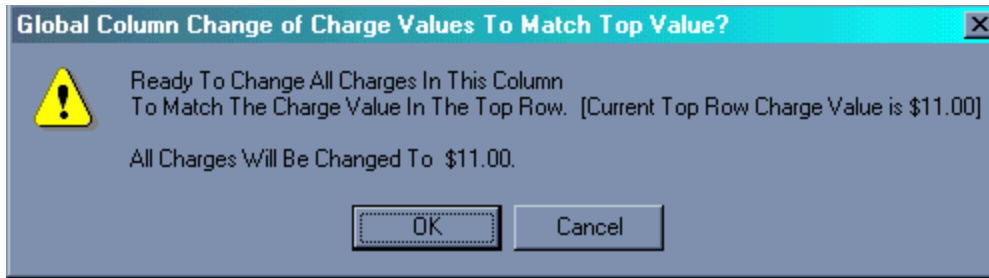
If you click OK, all the values will change to $11.00, except for columns where processing has moved to a state where a change in charge isn't appropriate, such as Status of Invoiced, or Not Filled. Similar restrictions apply to most Global Column Changes.

Most of the columns have Dropdown boxes, or Calendar controls, for choosing options. The Delivery Method column can be changed by clicking on the Down Arrow and choosing from the list:

Deliv	Source
Mail	DOCLINE
Mail	DOCLINE
Mail	DOCLINE
pi ▼	DOCLINE
Mail ▲	
Fax	
Ariel	
E-Mail	
picKup ▼	

If you start typing the beginning letters of the value (as in picKup, above), the selection should be found as a matter of course. You can also **open a dropdown box on any Grid** either by clicking the down arrow or by pressing **<Alt><Down Arrow>** in the field.

Save Changes Button

In any case where changes are made to values on any Grid, the changes are written to the database whenever the focus is moved from the row that is being edited to another row on the Grid. Just clicking on another row, or using the down arrow or up arrow keys will cause the change to be filed. Once editing has begun, the **Save Changes button** will appear when there are changes ready to be filed. This button is really just an alternative method of registering changes, since any movement out of the row will do the same thing. The Save Changes button is essential, though, when a Grid has but one row.

Field is Status of Request. DropDown Box Shows Allowed
Values of: R = Received; F = Filled (Not Yet Invoiced); N = Not
Filled; I = Invoiced; P = Paid; U = Uploaded To EFTS.

Save Changes

All Billing Items - By Borrower

	Borrower	Year	Title	Chrg	Type	EFTS	Acted	Paid On	Status
▣ ⊹	:AUHB\ ▼	2000	Drug safety	$11.00	Journal	No	06-Sep-00		Paid ▼
☐ ⊹	1AUAU! ▼	1998	Psychological	$10.00	Journal	No	13-Aug-98		Uploaded

Clicking this button files any changes without the necessity of leaving the row.

Quick Journal Times Loaned Report

To have a quick look at all Lend transactions for any title, just click into the Title cell in any Lend Grid to expose a **Quick Jrnl Rpt button**. Click this button (or press **<Alt><Q>** on the keyboard) to see a list of all times the Journal Title was loaned since the beginning of the year.

Displaying and editing Lend Citation records

The **citation information underlying the records displayed on any G**rid can be displayed by clicking on the + sign to the left of the record. This information is kept in the **tblLendBibs** Table of QuickDOC.MDB and contains the following fields:

BibRQNO	- Request Number, associates this record with tblLendItems
Citation	- Citation information
Article	- Title of the article loaned
Author	- Author of the article loaned
Copyright	- L or G, from the original request
Patron	- Patron name from request

The highlighted cell is shown as above and any of the information displayed (except for the first cell, which contains the Request Number) can be edited in the usual fashion, by either clicking at an insertion point or typing over the currently selected value.

The insert seems to display best, by the way, when the record to be opened is toward the top of the Grid, where it displays underneath the current record, rather than at the bottom, where the display will move the current record to the top, and then display the child record underneath it. The effect of this movement can be confusing at first in the latter instance.

Searching Lend Grid Records

My boss is asking me how many loans have we gotten at no charge versus the amount we've paid for. Is there any way I can get this for either what we've borrowed or what we have loaned using QD?

The **Compute Totals** Report will give you average cost per Loan/Borrow but not absolute numbers for **Free** and **Not Free**. But we can get these numbers fairly easily from the Lend Grid.

    1. Open up the Lend Item Backfile Grid and choose the period you want to search.

    2. Click the **Search By Charge** Ribbon Button and enter 0 as the Charge Equal To choice.

    3. Click Search and the total will be displayed as "nnnn **Records Retrieved**" just beneath the Search Button. These will also include Not Filleds, though.

If you want to eliminate those, left-click the header of the Status column and choose Sort Descending. This will put all the Not Filleds near the top. Click on the **Record Selector** (the small button at the far left) of the first Not Filled row, then scroll down and, holding down the Shift Key, click the Record Selector next to the last row. This will select all records in between and will show you the total: "nnn Records Selected" on the upper left. Subtract this number from the total and you have your Lend answer.

Print Lend Grid Records

The **Print Recs button** provides a quick way to get a printout of a Grid. The first time you choose to print you'll be brought to the **Page Setup screen**, to choose your typical print parameters (**Margins, Orientation**, etc.).

Page Setup for Printing Lend Grid Items

These are saved as defaults (in a file called **PageSet.dat**) and used for subsequent print jobs. If no settings are chosen, then the Page Setup form keeps coming up, so it's a good idea to pick a default setting. Also, when you change printers, or if you encounter a **Printer Not Found** error when trying to print from the Grid, you can force a new Page Setup by choosing **Reset Printer** from the File Menu. This will clear out the current PageSet.dat file so that all new values can be written for the new printer. You'll need to exit QuickDOC and re-enter for the **Printer Reset** to take effect.

Because the Print Setup is used mostly in the Grid Print process, the print-related choices on the File Menu are often not enabled if a Grid is not being displayed. If the choice you want isn't enabled, just open any Grid and populate it with some records. That should give you the following version of the File Menu (under File on the Menu Bar):

If the number of Grid records equals a print job of two pages or less, it will be sent directly to the printer. There are approximately 30 lines on each page for **Landscape** and 37 for **Portrait**, so that reports of fewer than 61 or 75 records, respectively, will be printed directly. If the report is longer than that, you'll first get a message box asking whether you want a **Print Preview** first, where you can choose the specific pages to print.

Under **Print some pages**, you can choose the specific pages to print.

In the example above, we've chosen to print the **first page, plus pages three and four**.

You can also choose to **print just Selected Records**. First, select the records you want to print by clicking on the Record Selector button (the leftmost column on the Grid). **Hold down the Ctrl key while selecting to add multiple records, or hold down the Shift key after selecting the first record and click the Record Selector of the last record in the group to select all records in between.**

[**This is the Record Selector column**.]   [**All dark blue rows are selected**.]

Add Lend Item Form

Selected with the Toolbar **Add Lend button**, or from the Menu Bar under Add New, and Lend, this form adds a record to the Lend Item backfile. It can be a **Non-DOCLINE item** or an **item not successfully captured through QDPortal**. The Add Lend Item Form also includes access to the **Libraries List**, for selecting the Borrowing Library, as well as a **Journal Titles List** (which is searchable by Title, ISSN or NLM UI), which can also be used for incremental data entry. You can also use the **Down Arrow key** to locate the Library (or Journal Title) and the **Enter key** to choose the highlighted selection and transfer the information to the Add Lend Items form.

If you begin typing the LIBID when the Libraries List pops up, the selection will begin travelling down the list until it reaches the LIBID in question (assuming it's already in there).

Clicking on that list item (or pressing **Enter** when the item is highlighted) effectively registers your choice. Once you choose the Library from the list, **the Library's values for LIBID, Default Charge, Preferred Delivery Method and EFTS status are filled in at the same time**. If you

don't want to use the Lookup List, you can **enter the LIBID directly** (assuming you know what it is) by exiting the Libraries List without making a choice:

1.　　　　Double-click in the LIBID box (or press the Left Arrow Key) to return focus from the Libraries List to the Borrower box on the Add Lend Item form.

2.　　　　Type in the LIBID.

Check the libraries box to the right and it should match if your typed-in value is in the database.

Default values are also the settings for each of the Combo Boxes, although any others can also be chosen from the dropdown list.

The program keeps a table of **Journal Titles**, **ISSNs** and **NLM UIs**, sorted alphabetically by either ISSN or Journal Title, which can be used for authenticated data entry. Choosing an item from the list will fill in both the Title and ISSN text boxes.

The first match after four digits will move those values over to the Add Lend Item form. But keep entering the ISSN until it travels down the Journal Titles – ISSN List to the correct Journal Title. At that point press Enter or click on the entry to move the values for ISSN and Journal Title over to the Add Lend Form.

If you don't know the ISSN, leave it blank and use the Title box in much the same way: For an **incremental Journal Title Search** begin typing the Journal Title, using the common QuickDOC abbreviations (see below) and the list will be populated after the fourth character. Continue typing until you reach the desired title (it would require Br J h to get there in the above case).

You can also use the **Journal Search button in the Add Lend Form** to search on title words:

would return all titles with "trauma" in the Journal Title.

Use the **New Journal Title button** to move to the **Add/Edit Journals Form** to add a title.

Once the Journal ISSN and Title have moved over, a new **Edit Journal Button** appears, which can be used to move directly to the Add/Edit Journals Form:

 If the Journal Title is not on the list, you can add the Title and ISSN so that it's included in future lists, or you can just add the title for this request only (without the ISSN). Since we don't keep track of ISBNs, this will always be the case for monographs.

When entering titles directly, either here or in the Edit/Add Journal Title form, try to use the list of Journal Abbreviations that appears just off the right side of the form, so that future sorting and displaying of Journal information can be consistent. You can enter a Journal abbreviation by clicking on it, or simply by typing it in on the form.

Journal Abbreviations used in QuickDOC are few and fairly standard.

Journal Abbreviations

Am	American
Ann	Annals of
Annu rev	Annual review of
Arch	Archives of
Aust	Australian
Br	British
Bull	Bulletin of
Crit	Critical
Curr	Current
Eur	European
Exp	Experimental
Int	International
J	Journal [of]
Probl	Problems in
Proc	Proceedings of
Rev	Reviews in
Scand	Scandinavi[an,ca]
Trans	Transactions of

Click On Journal Abbreviation To Select

An attempt will be made to automatically format data entered for **Citation information**, etc., so that keyboard data entry can be as efficient as possible. In general, the following rules obtain:

1. You can retrieve the last entry made in any text box during the current session by pressing <F3>.

2. Borrower choice is made from the Libraries List. For **Borrower last entry**, first press the **left arrow key** to exit the list, then press <**F3**>.

3. Entries with Combo Boxes respond to typed entries by travelling down the list of choices.

4. ISSN and Title boxes present a list matching the first three letters typed and then travel down that list for each additional letter typed. Press Enter when the correct item is reached.

5. Borrower Charge box is completed with the default charge filed for that Delivery Method in the Borrowing Library record.

6. The Max Cost box is automatically given whatever value is entered in the Charge text box.

7. Date fields and Combo Boxes retain the values from the previous entry as defaults.

8. All citation information (including Month) can be typed in lower case and QuickDOC will attempt to reformat after you press Enter for that field (you can press the Up Arrow, or Shift-Tab, to return to a previous field if the automatic format is not to your liking).

9. When typing in page numbers, if you press the dash (-) after the **Start Page** the cursor will jump directly to the **End Page**.

10. The Print Copy Checkbox will retain its last value (True or False) from session to session.

11. The Alt-A accelerator key will work to simulate a click of the Add Record button from anywhere on the form

The **Print Copy checkbox** determines whether a printout of the information for this request will be after the record is added. If you want hardcopy printouts of each item added, check this box. Once the box is checked (or unchecked), that value is filed in the tblLocals table of QuickDOC.MDB as

PrintLendAdd = True

and becomes the default thereafter.

Requests are printed two to a page, so you won't actually see the first printout until after the second request is entered. If the Exit button is clicked after an odd number of records were added, the last request will be printed at that time on a page of its own.

Since these printouts use your **Default Printer**, it will also use whatever default settings your printer was left at during your last print job. Watch out for situations where the printer was left at Landscape instead of Portrait, or where some other application set the printer to some special setting and never reset it back. Strange characters may result in the latter case. Turning the printer off and on will usually reset the default settings.

Print Format of Added Lend Request

Lends added using the Add Lend Item Form have the following format:

Added Lend Request Number: 44297
Date Added: 7-Nov-01

Borrower LIBID:	MAUHMS		
Journal Title:	Science		
Citation:	1999 Dec;286(5448):2248-		
Article Title:	NIMH		
Article Author:	Holden C		
ISSN:	0036-8075		
Request Status:	Filled	**Source of Request:**	DOCLINE
Item Type:	Journal	**Item Form:**	Copy
Delivery Method:	Fax	**Copyright:**	CCG
Patron:	Smith		
EFTS Pmt:	True	**Rush Request:**	False
Charge:	$11.00		
Max Cost:	$11.00		
Date Recd:	7-Nov-01		
Date Filled:	7-Nov-01		
Date Paid:			

Dates on Added Lend Records

Today's Date will be the default date for records added, but previous values are kept from record to record in most cases, so that repetitive data entry might be reduced. In all data entry Date fields, the format is now **mmm dd, yyyy**, so that International dates can be entered in a format understood no matter what the machine's Date setting format might be. If you press "D" in the Date Rec'd text box, below, the entry will jump to "Dec" since that's the only match. You can also use the dropdown calendars, as always, for entry of dates.

Entering Multiple Lend Records

There are **function keys in Add Lend Data Entry Fields** that may help with data entry when entering multiple records.

The <F3> Function Key will Restore the Previous Entry in this field.

The <F5> Function Key will Clear this field.

The **function keys in Add Lend Date Fields** have specific duties:

The <F3> Function Key will enter Today's Date.

The <F4> Function Key will display the Calendar (useful if your hand is on the keyboard, not the mouse).

The <F5> Function Key will Clear the field.

Library Billing

Monthly Billing Overview

QuickDOC can be used to manage Monthly (or other periodic) billing by **Invoice**, by **EFTS** (a system run primarily for Medical Libraries through the **University of Connecticut Health Center**), by **IFM** (a system run by **OCLC** for OCLC items), by **Deposit Account** or by **individual request** payment.

Suggested steps are as follows:

1. Open the **Library Billing Grid** and set the dates for the period to be billed.

2. Click the **Search By Status of Request** ribbon button to search **Filled items** only.

3. If you have Libraries with **reciprocal agreements** or other creative financial arrangements, you can process these first, either by

    a. changing the charge to 0.00, or

    b. clicking into the **Status** Field (currently set to 'Filled'), exposing the **To Pmts** button, which will allow you to post the payment with Payment Method **Credit**, or

    c. whichever other method you use to make these ineligible for EFTS Uploads or Invoices.

4. If you have items that will be paid by **IFM**, check those next.

    a. Click the IFM Header and choose Sort Descending to put all IFM eligible items at the top;

    b. Make sure **EFTS = No** for all those that will be paid by IFM (items with EFTS = Yes and IFM = Yes will be included in any intervening EFTS Upload, although not on Invoices);

    c. Change the IFM value to No for any IFM item you want to bill by Invoice or EFTS.

5. If you have items to be billed through **EFTS**, check those next.

    a. Click the **Show EFTS Upload Items** ribbon button and set **Equal To TRUE** to see the items from that period that will be included in an EFTS Upload File; scan to be sure that the charges are appropriate;

    b. If you have time, also check the same with the value set **Not Equal To True**, to see the items that will NOT be included; in some cases you may wish to change the charge or the EFTS value if it hasn't been set properly. In most cases, if you sort by Borrower after getting this list, any anomalies will stand out amidst that Library's other activity.

    c. All the items in the EFTS Not Equal to True list will be either **Free** (never to be billed), **IFM = Yes** (waiting to be paid by IFM), or **ready for Invoicing**.

6. Run the **Create EFTS Upload File** process, which will change the status of those to Uploaded.

7. Run Invoices for that month.

Billing Options and Forms

The Library Billing Grid

Choose the **Library Billing Button** on the Tool Bar to get to the Library Billing Grid.

This Grid shows Billing-related information, including Paid Date and the Invoice Number or EFTS Upload related to each item. When you select the **Library Billing Grid**, an additional criterion on Charge <> 0.00 is applied, so that the **Library Billing Grid won't included FREE items**.

The Library Billing Grid also includes two special **Ribbon Search Buttons:**

Show EFTS Upload Items Search

Create Invoice By Library

The **Show EFTS Upload Items** button can be used to provide a quick display of items that will--- or will not, depending upon the Combo Box choice---be contained in an EFTS Upload file for the Dates chosen. This choice is explained further in the EFTS section, later.

The **Create Invoice By Library** button creates a list of items for the Borrower selected that qualify for Invoicing during the period from the Beginning Date to the End Date selected. A brief discussion of this tool is included in the section below.

This list, for the period 1-Sep-00 to 30-Sep-00, contains all records with a charge for the period specified (leaving the Search Text Box blank will always get all matches). The items for MAUHLO have already been invoiced and paid, and the Invoice Number appears in the rightmost row of the Grid. If you hold the cursor over a partially revealed value, a tool tip will pop up with the complete field information. If you want to make a horizontal scroll bar appear at the bottom of the list, so that you can scroll to make the last column appear completely, drag the vertical bar between 'Source' and 'Invoice' in the header to the right (making the Invoice column even smaller); once it reaches a width where it's nearly invisible, the scroll bar at the bottom will appear, to facilitate moving that row into view.

The Library Billing Grid, because it automatically screens out FREE items, makes searching and editing a bit less complicated for preparing Invoices and EFTS Uploads, but be sure to check the general Lend Grid periodically for items mistakenly filed as FREE. Clicking on a cell in the Borrower Column of any Grid will expose the **To Libs button**, where a Library's charge may be quickly edited, so that future requests are filed with the proper charge.

Set Local Preferences for Library Billing

Before printing Invoices for the first time (and whenever you need to make changes to any of the Invoice boilerplate information thereafter), check under the **Setup** Menu for **Set Local Preferences**, which contains values for items normally printed on an Invoice and other local choices for Library Billing.
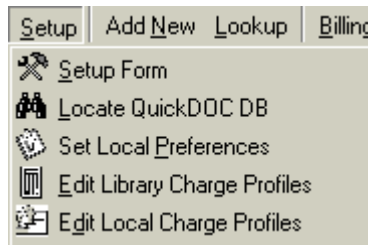
See the **Local Preferences** section for more information.

Print Invoices

Print Invoices is the third choice under the **Billing, EFTS Menu**.
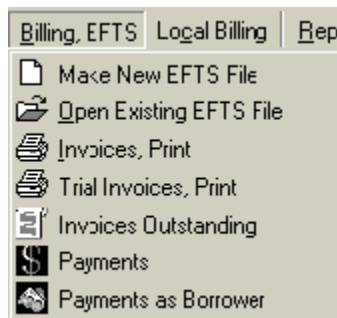
The Invoice choice is also available under the **Reports** Menu Bar item, **Loaned Items**. Use either of these methods to print a regular monthly Invoice run. See '**Create Invoice By Library**', below, for a method that will print an invoice for a single Borrower (or a selected group of Borrowers) only. Invoices can be printed to **Print Preview**, in order to get an idea as to what will be generated, or to any **Printer** that shows up in your list of Printers. **Invoices can also be printed with up to 5 copies** on each run.

Invoice Numbers are composed of the LIBID of the Library being billed and a sequential number, running from 0001 to 9999 before resetting, to further create a unique number. The last Invoice Number used is kept in the **tblLocals** Table in QuickDOC.MDB, under the tag **LastLendInv**.

Methods for Printing QuickDOC Library Invoices

QuickDOC includes dropdown combo boxes on the Library Invoice form (under Billing, EFTS on the Menu Bar) for choosing the **Printer to print to** (as well as the **default Print Preview**) and the

number of copies to print. In most cases this arrangement will be the easiest to use and most convenient.

In some situations, however, access to the full **Windows Print Menu** might be necessary in order to set some specific printer value just for the Invoice run to be printed. One such option might be the ability of some printers to **collate reports** with **more than one copy** to be printed. Typically, **collation** means that any report set to print more than one copy will first print the first copy all the way through, then the second copy all the way through, etc. In most cases, for reports, this is what you want.

In some cases, though, and the printing of **multiple copies of Invoices** is the obvious example, collation is **not** what you want. Multiple copies of Invoices should stay together, so they can be mailed together.

In order to provide this option, QuickDOC will activate the **Print choice on the File Menu** when any of the Invoice choices are selected under **Billing, EFTS** on the **Menu Bar**. If you need to set some specific printer setting, use this method rather than the boxes provided on the QuickDOC Report forms. Here's the Library Billing example:
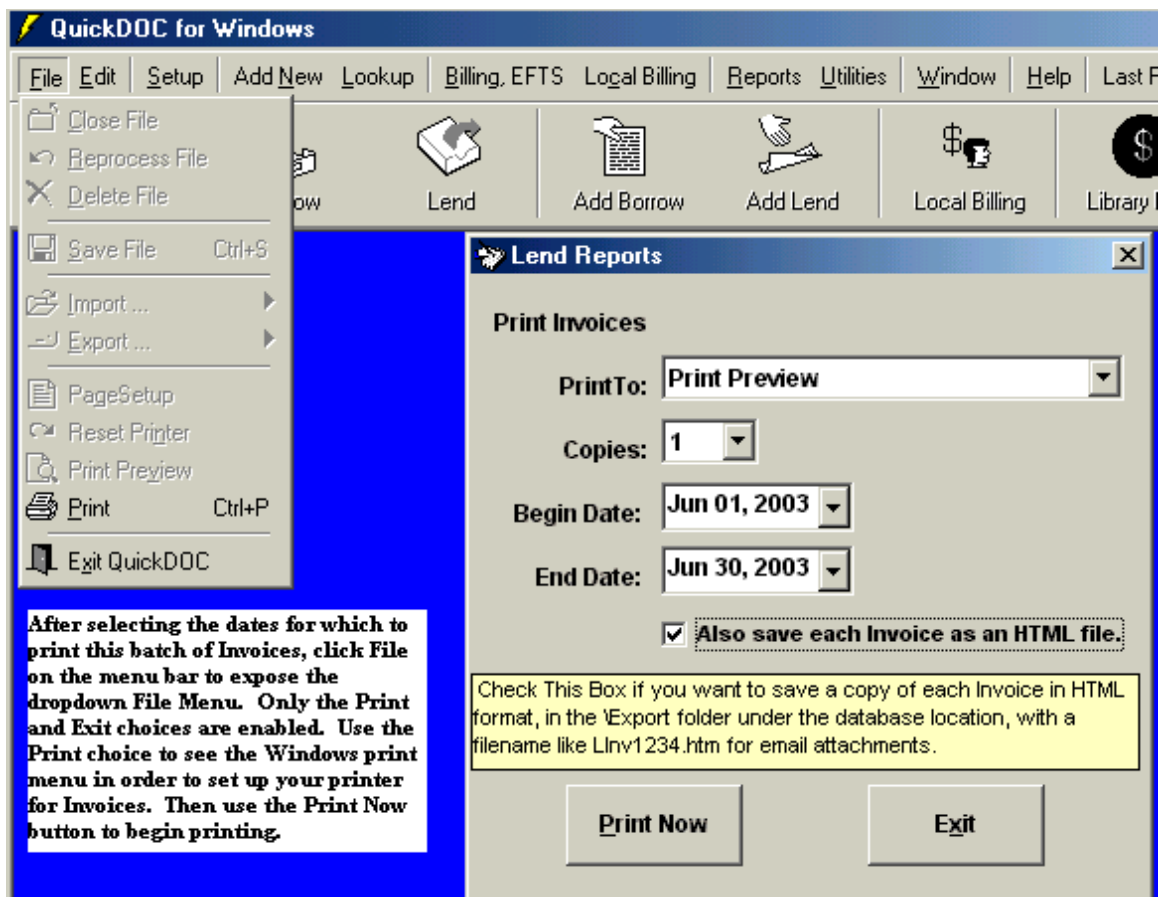
Ignore the choices on the Report menu and click File on the Menu Bar, then Print, to get the **Print Menu**. On the Print Menu, select the **Printer Name** you want to use, the **number of copies** you want to print (any number of copies you might have selected on the Library Invoice form will be ignored), and any other **Printer Properties** (such as collate, for example) that you want to apply to this print job.

Your Print Menu may look slightly different, depending upon the version of Windows running on your machine and the printer's capabilities. Once the selections are made, click **Ok** to return to the Invoice Form.

You'll notice that the **Print To** and **Copies** boxes now show your selections made using the Windows Print Menu, but that they are now **disabled** (grayed out). This alerts you to the current settings and reminds you that the changes were made on the Windows Print Form, not this one. The other values, Begin Date, End Date, etc., are still available and can be changed at any time.

If you want to **stop using the Windows Print Menu settings**, first go back to the Print Menu, using the **File, Print** method. Undo any changes you've made just for this batch Invoice run, so that the **Windows Printer defaults** are returned to their normal settings. Click **Ok** to save the

Windows settings, then **Exit** to quit the QuickDOC Invoice form. When you come back in the Print To and Copies boxes will again be enabled and ready for use.

It's probably a good idea also to get in the habit of revisiting the Windows Print Menu after each Invoice batch is run and before exiting the Print Invoices Form, to avoid leaving the printer at settings that will be an unpleasant surprise when some future report is printed.

Print Trial Invoices

The **Print Trial Invoices** choice, above, prints exactly as the Invoice run will print, except that Invoice Numbers aren't assigned, and only one copy of each Invoice is printed. Use this instead of the Print Preview to generate actual invoices that can be used for proofreading and editing prior to running the actual invoices.

How Items are Selected to be included in an Invoice:

1.　　The item must have a **Charge** (or Credit) other than 0.00

2.　　**EFTS** must be **No**.

3.　　**IFM** must be **No**.

4.　　**Status** must read **Filled**.

In the Billing Grid below, only the last two items, with the red check marks, would appear on an invoice run, either the automatic batch run or an individual Invoice printed frem the 'Create Invoice' button:

	ReqNo	Borrower		Year	Title	Chrg	Type	EFTS	IFM	Acted	Paid On	Status	Deli	Ru	Source
▼															
	04609496	COUCOL	▼	1997	Transcultural	$8.00	Monog	Yes	No	4/12/2002		Filled	Mail	No	OCLC
	6000041	MAULCB	▼	1996	Paediatric an	$3.00	Journ	Yes	Yes	2/22/2002		Filled	Fax	No	DOCLIN
	5726795	MAUSLM	▼	2001	Seminars in r	$3.00	Journ	Yes	No	1/30/2002		Filled	Mail	No	DOCLIN
	5727405	MAUSLM	▼	1999	Biology of nec	$3.00	Journ	Yes	No	1/30/2002		Filled	Mail	No	DOCLIN
	5750729	MAUSLM	▼	1995	Indian pediatr	$3.00	Journ	Yes	No	2/1/2002		Filled	Mail	No	DOCLIN
	5862908	NJUCSM	▼	2001	J inherited m	$10.00	Journ	Yes	No	2/12/2002	6/17/2002	Paid	Mail	No	DOCLIN
	5323916	WAUWAS	▼	1989	PHYSIOLOGIC	$5.00	Monog	No	Yes	12/19/200		Filled	Mail	No	DOCLIN
✔	5846093	WYUCBL	▼	1989	MCN. Am J m	$5.00	Journ	No	No	2/11/2002		Filled	E-Ma	No	DOCLIN
✔	5838920	WYUCBL	▼	2001	J pediatric ga	$5.00	Journ	No	No	2/12/2002		Filled	Mail	No	DOCLIN

All Billing Items - By Borrower

The Invoice is printed in the following format (this is the Print Preview version; the Printed versions is exactly the same, but also includes a Bold **Invoice Total** at the top, across from the Borrower's address):

Invoice
01-Aug-00 to 31-Oct-00

27-Dec-2000   **Invoice Number: MAUHYA 0001**   **Page 1**

Make Check Payable To: Agoos Medical Library   **Terms: NET 30**

Beth Israel Deaconess Medical Center	Tel: 617-667-4225
Agoos Medical Library	Fax: 617-667-7197
330 Brookline Ave.	jay@caregroup.harvard.edu
Boston, MA 02215	**FedID: 1234-55**
	Cost Center: 1884

Include copy of Invoice or Inv No. with payment

CAPE COD HOSPITAL
Frazier-Grant Medical Library ILL
27 PARK STREET PO BOX 640
HYANNIS, MA 02601

Req No.	Year Title	Citation	Patron	Charge	Date Filled
297365	2000 Psychological medicine.	Mar;30(2):433-42	Gordon, Dr.	$3.00	14-Aug-00
268516	1998 J oral maxillofacial surgery	Oct;56(10):1170-6; d	Bergland, Dr.	$3.00	14-Aug-00
268515	1998 J oral maxillofacial surgery	Oct;56(10):1158-63	Bergland, Dr.	$3.00	14-Aug-00
268514	1999 J oral maxillofacial surgery	Jun;57(6):667-71; di	Bergland, Dr.	$3.00	14-Aug-00

Total Items For MAUHYA: 4   **Total Charges: $12.00**

Once the Invoice is printed for an item, the **Invoice Number is available on the Library Billing Grid, in the Invoice column**.

Library Invoices and Window Envelopes

There's a **Move Invoice Address Up (1, 2 lines)** choice on the Billing Prefs Tab of the Local Preferences form that can be used if your Invoice Address doesn't quite fit the window of your window envelopes. You can move that address section up either 1 or two lines toward the top (you can push it down by adding additional lines to your return address, although this is not usually necessary. Moving the address up 1 line is accomplished by removing the blank line between the Invoice Dates and the Invoice Number line, as illustrated:

Library Invoice with Move Address Up 1 line checked.

Invoice
01-Jun-03 to 30-Jun-03

No space between Dates and Inv No. line.

22-Sep-2003   **Invoice Number: TNUTNK 0001**   **Page 1**

Make Check Payable To: Agoos Medical Library, Beth Israel Deaconess Med Ctr   **Terms: NET 30**

Beth Israel Deaconess Medical Center	Tel: 617.632-8480
Agoos Medical Library	Fax: 617.632-8316
One Deaconess Road	dyoung3@bidmc.harvard.edu
Boston, MA 02215	
	Our Cost Center: 0108266

Moves Return Address below up 1 line for Window Envelope.   Include copy of Invoice or Inv No. with payment

Move Up values are ignored for HTML Invoices, since these are delivered by email and won't need a window envelope.

Moving the address up **2 lines** is accomplished by eliminating the blank line between the Invoice Dates and the line with the Invoice Number in the middle, and also moving the **Include copy of Invoice or Inv No. with payment** line from just above the **Bill To address** to a line just below it and just above the line that separates the header from the column headers of the Invoice.

For Library Invoices, where the **Our Cost Center** value may not be as important, you can also generate an easy move up of about a half a line by not including a Cost Center value for Library Invoices. Weigh this small move up against the necessity (or lack of it) that the payer should know your Cost Center when making payment and eliminate it if it's not necessary and you want that extra move up for the Bill To address.

A typical Library Invoice with a 2 line move up will appear as follows, with both the removed lines indicated:

Library Invoice with Invoice Address Above Return Address

If you have checked the **Put Invoice Address above Return Addr** checkbox on the Local Preferences form, the Invoice Address will appear on top. This is useful for window envelopes where the window appears about halfway up rather than toward the lower left of the envelope. In such cases, folding the invoice in thirds may produce a result like the following:

After checking the checkbox, the positions are reversed (also adding a 1-line move up pushes the Invoice Number line above the window as well):

Library HTML Invoices with Invoice Address On Top

Unlike the Move Up 1 and Move Up 2 operations, which aren't reflected in HTML versions of those invoices, when you swap the Return Address and Invoice Address in printed invoices, this swap also occurs in the HTML versions of the Invoice:

Invoice

01-Jun-03 to 30-Jun-03

HTML Library Invoices also swap the Return Address and Library Address blocks. Nothing else changes.

27-Sep-2003   **Invoice Number: TNUTNK 0020**   **Page 1**

University of Tennessee Medical Center Demo Enviro
Preston Medical Library ILL Dept
1924 Alcoa Highway Box U111
Knoxville, TN 37920-6999

Invoice Total: $22.00

Make Check Payable To:
Agoos Medical Library, Beth Israel Deaconess Med Ctr   **Terms: NET 30**

Beth Israel Deaconess Medical Center   Tel: 617.632-8480
Agoos Medical Library   Fax: 617.632-8316
One Deaconess Road   Email: dyoung3@bidmc.harvard.edu
Boston, MA 02215   FedID: 02-8123456
          Our Cost Center: 0108265

Line item listing of Library's Borrowed items is below. Nothing but the address swap is changed.   Include copy of Invoice or Inv No. with payment

Again, because these invoices aren't mailed, address placement isn't crucial.

PO Numbers printed on Library Invoices

QuickDOC will print a Borrowing Library's **Purchase Order Number** on Invoices sent to that Library once that number is entered in the **Library Account Number** field on the Charges Tab of that Borrowing Library's record. All Purchase Order Numbers must begin with the 3 characters "PO#" in order to be recognized as such.

The reason for the initial **PO#** in that field is that, conceivably, one could use that field in the Library record to save 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.

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   Page 1

Make Check Payable To: Agoos Medical Library   Terms: NET 30

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

Our Cost Center: 0108266

Include copy of Invoice or Inv No. with payment

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

[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   Tel: 617.632-8312
Agoos Medical Library   Fax: 617.632-8316
One Deaconess Road   dyoung3@bidmc.harvard.edu
Boston, MA 02215

Our Cost Center: 0108266

Include copy of Invoice or Inv No. with payment

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

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

Rush Requests note on Library Invoices

When an item on a Library Invoice is a Rush Request, which will normally incur a **Rush Surcharge**, the Invoice 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. Rush item surcharges 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]	

Library Invoice Comments

There's an **Add'l Comment entry on Invoices** option available on the Billing Prefs Tab of the Local Preferences form for entering a brief comment (up to 75 characters long) that will print at the bottom of the Library Invoice.

Invoice comment lines appear at the end of Invoices, after the Totals line, with a horizontal line separating the comment from the Invoice section. Here's an example for a Library Invoice:

The comment line on the Library Invoice appears just below the Totals line, separated by a line.					
			Include copy of Invoice or Inv No. with payment		
Req No.	Year Title	Citation	Patron	Charge	Date Filled
2886	2003 J clinical investigation	May;111(10):1505-18	Docline 1.6	$11.00	20-Jun-03
2938	2003 Breast cancer research (Print)	5(2):R18-24	Docline 1.6	$11.00	20-Jun-03
Total Items For TNUTNK: 2			**Total Charges:**	**$22.00**	

We also accept payment by VISA, MasterCard or American Express.

If there is no comment saved in Library Billing Preferences, the horizontal line is also omitted.

The comment will be printed at the center of the page, just under the horizontal line. The limit of 75 characters is set to ensure that there will be enough room for a cleanly centered line (the comment above is 62 characters long), no matter how many uppercase or other wide characters are used. If there is no Additional Comment Line, the horizontal line will not be printed.

Canadian Bilingual Format for Library Invoices

If you have checked the **Use Canadian Invoice format?** checkbox on the Local Preferences form, your Library Invoices will have bilingual (English/French) labels in most cases. Item data will still be in English (unless it was entered in French under Add Borrow or Add Lend), since it's been imported from DOCLINE, and address information will be as entered in the Library record and on the Addresses Tab on the Local Preferences form, but bilingual labels will be displayed on the printout wherever possible.

Even with these changes, if you're using bilingual labels, you should try to keep the entries for **Make Check Payable To**/**Prière de faire le chèque à l'ordre de** and **Terms**/**Conditions** as concise as possible, since space here is limited.

Here's an example of the Library Invoice with Use Canadian Invoice format checked:

Invoice/Facture
01-Jun-03 to/au 30-Jun-03

Choosing the Canadian format prints bilingual tags and labels in most cases.

8-Sep-2003   Invoice No/No de facture: TNUTNK 0001   Page 1

Make Check Payable To/Prière de faire le chèque à l'ordre de:
Agoos Medical Library, Beth Israel Deaconess Med Ctr   Terms/Conditions: NET 30

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

Because the bilingual format takes up more space, some entries may use two lines instead of one in the English only format.

Tél: 617.632-8480
Fax/Télécopieur: 617.632-8316
dyoung3@bidmc.harvard.edu

Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

University of Tennessee Medical Center Demo Enviro
Preston Medical Library ILL Dept
1924 Alcoa Highway Box U111
Knoxville, TN 37920-6999

Address information and bibliographic information will follow whatever format you have entered in the Library or bibliographic record.

Req No/No de demande	Year Title/Année Titre	Citation/Référence	Patron/Usager	Chg/Frais	Date fld/d'envoi
2938	2003 Breast cancer research (Print)	5(2):R18-24	Docline 1.6	$11.00	20-Jun-03

Total Items For/Total des requêtes pour TNUTNK: 1   Total Charges/Total des frais: $11.00

A Canadian (bilingual) Library Invoice with a **Bill To address** moved up 2 lines might look like this:

Library Invoice (Canadian bilingual format) with Move Address Up 2 Lines set in Local Preferences.

Invoice/Facture
01-Jun-03 to/au 30-Jun-03

No space between Dates and Inv No. line.

22-Sep-2003   Invoice No/No de facture: TNUTNK 0001   Page 1

Make Check Payable To/Prière de faire le chèque à l'ordre de:
Agoos Medical Library, Beth Israel Deaconess Med Ctr   Terms/Conditions: NET 30

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

Tél: 617.632-8480
Fax/Télécopieur: 617.632-8316
dyoung3@bidmc.harvard.edu

Our Cost Centre/Code budgétaire: 0108266

University of Tennessee Medical Center Demo Enviro
Preston Medical Library ILL Dept
1924 Alcoa Highway Box U111
Knoxville, TN 37920-6999

"Include copy" line moved from above address to below.

Invoice Total/Montant total facturé: $ 5.00

Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

Req No/No de demande	Year Title/Année Titre	Citation/Référence	Patron/Usager	Chg/Frais	Date fld/d'envoi

HTML Invoice option for Electronic Billing

At the time Library Invoices are printed each month, you can opt to save a copy of each Invoice as an HTML file. These HTML versions of the Library Invoice can be forwarded as an email attachment to Libraries you wish to bill electronically. To save an HTML version of an Invoice run, check the **Also save each Invoice as an HTML file** checkbox on the Lend Reports form after choosing the Invoice Report. Invoices printed, or reprinted, from the Library Billing Grid will also provide a prompt for this save.

.

If this box is checked, a copy of each invoice will be saved in the **Export folder** that always exists just beneath the location of the QuickDOC.MDB database. All **Library Invoice HTML files** will be in the format **LInv####** (where #### is the actual four-digit invoice number), e.g., LInv1234.

Since these files aren't created during Print Preview, it will be necessary to print at least one copy of the invoice in order to have the file generated. Once the files are made, you can use the printouts to identify the files to send as email attachments. They will all be together in the Export folder:

These **HTML Invoice files will be deleted when an Invoice is deleted**, and also **when an Invoice is paid**, but it will be useful to clean these files out from time to time to prevent clutter. If you delete an HTML Invoice file that you later want to resend, you can **recreate it by running a Reprint of the original Invoice**.

HTML Invoices are quite similar to printed Invoices and will be displayed in whatever might be the default Browser of whoever clicks on the file icon. Displayed in Internet Explorer it looks as follows:

HTML Invoice files are also saved when printing or reprinting Invoices from the Library Billing Grid, below.

Bilingual HTML Library Invoices

Bilingual HTML Invoices (**Canadian Format Library Invoices**) are even more constricted in space than the regular printed versions, since some of the fonts used in the HTML format take up more space than the typical printed format. Because HTML Invoices aren't mailed, though, the placement of the Address and Return Address isn't as critical as in a normal Invoice.

Here's an example of a Canadian format Library Invoice:

Invoice/Facture

01-Jun-03 to/au 30-Jun-03

| 10-Sep-2003 | Invoice No/No de facture: TNUTNK 0011 | Page 1 |

This line may word wrap on the printout, justified to the left.

Make Check Payable To/Prière de faire le chèque à l'ordre de:
Agoos Medical Library, Beth Israel Deaconess Med Ctr

Terms/Conditions: NET 30

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

Tél: 617.632-8480
Fax/Télécopieur: 617.632-8316
Email/Courriel: dyoung3@bidmc.harvard.edu

Our Cost Centre/Code budgétaire: 0108266

This line may word wrap on the printout, justified to the right.

Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

University of Tennessee Medical Center Demo Enviro
Preston Medical Library ILL Dept
1924 Alcoa Highway Box U111
Knoxville, TN 37920-6999

When a Bilingual HTML Invoice is printed, some lines may be printed on more than one line, even as they show (as here) on a single line. This is a result of how the printer renders table data, and there's not much you can do about it. Because it is Table Data, though, the result will be fairly neat and presentable, however the printer may format the printout.

Invoice Total/Montant total facturé: $11.00

Req No/No de demande	Year/Année	Title/Titre	Citation/Référence	Patron/Usager	Chg/Frais	Date fld/d'envoi
2938	2003	Breast cancer research (P	5(2):R18-24	Docline 1	$11.00	20-Jun-03

Create Invoice By Library

The **Create Invoice By Library** button creates a list of items for the Borrower selected that qualify for Invoicing during the period from the Beginning Date to the End Date selected. Here's the list for MAUCOM (I changed their EFTS value to 'No' so they would qualify for Invoices) created for the 01-Sep-00 to 30-Sep-00 period:

Billing Items

| Search By Borr, Date & ReqNo | Search By Library (LIBID) | Show EFTS Upload Items | Create Invoice By Library | Search By Status of Request | Search By Invoice No. | Search | By Dates | Print Invoice | To Pmts | Exit |

Search Items By Borrower — Containing — COM

3 Record(s) retrieved
Use ? As WildCard For Any Single Letter or Number

First Field is Request Number. May Be Up To 14 Characters Long. Must Be Unique in Database.

Save Changes

Billing Grid by Default captures only items with Charges Attached. Press <F2> (or Double-Click) To Edit Field.

Billing Items Ready for Invoice Printing, with Libraries Containing COM

▼	ReqNo	Borrower	Year	Title	Chrg	Type	EFTS	Acted	Paid On	Status	Delivery	Rush	So
⊕	493352	MAUCOM ▼	1998	J neurology, n	$3.00	Journal	No	9/5/2000		Filled	Mail	No	DC
⊕	573413	MAUCOM ▼	2000	Ann rheumatic	$3.00	Journal	No	9/12/2000		Filled	Mail	No	DC
⊕	681055	MAUCOM ▼	1991	Thorax	$3.00	Journal	No	9/21/2000		Filled	Mail	No	DC

Notice that the 'Print' Button above the 'Records Retrieved' panel now says '**Print Invoice**' rather then 'Print Recs'. If you click this button, an Invoice for these items, for this Borrower, will be printed, using the **last Printer you specified when printing an Invoice Run**, and in the number of copies specified then, as well.

Before the invoice is printed, if you've indicated in your Local Preferences for Library Billing that **Ask** is your choice for printing **HTML Invoices**, a message box will appear asking about this before each print or reprint; just press **N** to dismiss it without saving as HTML, or **Enter** to save a copy. Unused copies won't hurt anything, but will require cleaning out that Export folder from time to time.

If your invoice goes to **Print Preview**, rather than to the expected Printer, it's likely that the printer value stored for printing Invoices is out of date or missing. You can reset this value as follows:

1. Go to Billing, EFTS on the QuickDOC Menu Bar and choose Invoices, Print;

2. Choose dates where you know there are no actual invoices left to be printed (e.g., beginning and ending dates of last Sunday);

3. Select the correct printer from the list;

4. Click the Print button.

You'll get the **No Records to Print** error message, and no invoices will be printed, but the **InvoicePrinte**r value will be reset. Thanks to Christine Adams for this solution.

Library Invoice Numbers

Library Invoice Numbers are created using the Borrowing Library's **LIBID**, a **space**, and a formatted **four-digit number** running from 0001 to 9999. The count for **Library Invoice Control Numbers** is kept in the value **LastLendInv** in **tblLocals**. A typical Library Invoice Number is **MAUMGH 0002**. (**Invoice Numbers for EFTS Uploads** are equal to the **EFTS Upload File Name**.)

After 9999 the number resets back to 0001, so that there will be about 10,000 invoices before the control number reappears. Even then, the LIBID in the first part of the number should, in most cases, make it unique. Nevertheless, QuickDOC will check **tblInvoices** first, to prevent **duplicate Invoice numbers**. **If the invoice number already exists in tblInvoices**, then the **Library Invoice Number** is altered, by adding a single digit in the space between the LIBID and the control number, from 1 to 9 and then from A-Z, until the resulting number is unique in tblInvoices. If the next Library Invoice number is 0002, and the Library is MAUMGH, and an Invoice number **MAUMGH 0002** already exists, the Invoice number will be changed to **MAUMGH10002**:

Duplicate EFTS Invoice/File Names are made unique by adding the 1-9 or A-Z at the end of the filename. HTML Copies of Invoices will also use the augmented version of the Invoice Number, but the filename saved will ignore the newly-added digit, so that invoice **MAUMGH10002** will be found under filename **LInv0002** in the Export folder.

Reprint an Invoice

You can **Reprint a single Invoice** for any invoice listed in the **Invoice Column** on the Library Billing Grid by **clicking once on the Invoice cell to be reprinted**, then clicking the '**Reprint**' Button.

Invoices reprinted in this way will be printed, using the last Printer you specified when printing an Invoice Run, and in the number of copies specified at that time. The Reprint will include all items with that Invoice Number in the Invoice column and will re-calculate the Invoice Total as it prints, so that, if you delete an item, and then reprint that Invoice, the Invoice will include the original invoice total at the top, but a revised total at the bottom.

On Invoices Reprinted from the Library Billing Grid, you are asked before each Invoice is printed whether you also want an HTML Invoice file saved:
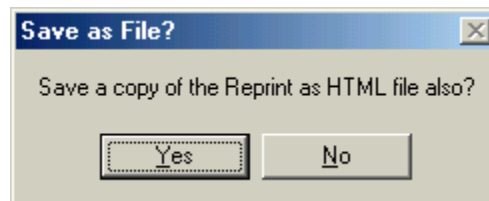
This question will appear before each print or reprint; just press **N** to dismiss it without saving as HTML, or Enter to save a copy.

Rather than deleting items included in an Invoice and then reprinting, it's best to create a new invoice, if the original hasn't already been sent, or add an adjustment (a payment) equal to the charge for the item you don't want to include, since payments are factored in when an invoice is reprinted.

 Payments made on an Invoice are subtracted from the Invoice Total at the top, and are also noted as Payments at the bottom of the Charge column, along with both the original and revised Invoice Totals.

List of Invoices Outstanding

The Billing, EFTS Menu Bar choice also includes a Report of Library Invoices Outstanding. This report includes all invoices generated during the period specified that have not been paid, or have received only partial payment.

This list can be used to reprint a second notice for selected invoices. A more automated process for generating second notices is still planned for some time in the future.

Deleting an Invoice - Library Billing Grid

If you click once in the **Invoice column** of the Library Billing Grid, the **To Pmts** button will appear just above the Grid. Use this button both to delete (or post) payments and to delete the Invoice listed in the LocalInvoice column. **If there is a payment posted to the Invoice, you must first delete the payment before deleting the Invoice**.

The **Payment Information Form** for an the Invoice specified in that Invoice cell will appear when you click the To Pmts button. If there has already been a payment on this Invoice you must first delete the Payment by clicking the **Delete Payment button**. This will produce the usual Message Box asking if you are sure. Click Ok.

When you click Ok, the payment is deleted and the affected items in the Grid are returned to Invoiced status. We're now ready to delete the Invoice. Click back into an Invoice cell that contains the Invoice we want to delete. Then click **To Pmts** again. The Payments Form reappears.

If the Delete Button still reads "Delete Payment," click once on the **Invoice Number Combo Box**. The button will change to "Delete Invoice" and will be enabled. After you click the **Delete Invoice Button**, you'll get the "Are You Sure?" Message Box. Click Ok to delete the Invoice.

After you click Ok, the Invoice will be deleted from the Invoices Table, all items in the Grid for that Invoice will be reset back to Filled, and the Invoice value will be blank.

Rerun a batch of Invoices

You can **Rerun a batch of Invoices just printed** by using the Global Change function on the Status column to reset all the invoiced items back to Filled. This process will also remove each item from the **Invoices Table** (tblInvoices) and **delete each invoice** when all of its items have been deleted. The steps are illustrated below.

1. Set the **Dates** to the same dates for which the batch of invoices was run.

2. Click the **Search By Status** Ribbon Button and choose **Equals Invoiced**.

3. Click **Search** to retrieve those items.

4. **Change the Status of the top row** from Invoiced to Filled and click **Save Changes**. This step will also remove the charge for that item from the Invoice Record in tblInvoices.

5. Click the header on the Status Column to get the **Header Context Menu**.

6. Click **Global Change**. This will select all the items in that column for change.

7. Click **Ok** at the message about changing to F (F is the code for Filled).

8. Status will be changed back to Filled for all; Invoices will be deleted from tblInvoices once all the Invoices items have been reset back to Filled; the Invoice column will be cleared; and these items will now be eligible for a new Invoice run on the Billing, EFTS menu.

Save Changes	Selected Records Have Been Changed To F.					

- By Borrower, Status	After Global Change completed.					
Acted	Paid On	Status	Delivery	Rush	Source	Invoice
3/13/2002		Filled ▼	Mail	No	DOCLINE	
3/13/2002		Filled	Mail	No	DOCLINE	
3/18/2002		Filled	Mail	No	DOCLINE	
3/18/2002		Filled	Mail	No	DOCLINE	
3/28/2002		Filled	Fax	No	DOCLINE	

Adding an Invoice Processing Charge to each Invoice

Our library director has decided to institute a fee for invoicing (in order to encourge use of EFTS instead). How do I add a $5.00 processing fee onto the invoice in QuickDOC?

One approach might be to create a special Lend Item for the processing fee and add it to the Lend Item Backfile for each library to be so charged with Received and Processed Dates of the last day of the Invoice period. Use the **Add Lend Item form** to create the item:

Use a Request Number in the format LIBID + INV + Month + two-digit year, so that the record number will be unique. Using the Monograph Type allows for using a dedicated phrase for the title, such as **Invoice processing fee**, as above. Typing **Chg for invoicing** in the Issue field will cause it to be printed in parentheses on the invoice line. Finally, if all these items are charged to a Source, such as Other, that is not used for anything else, then these ersatz items can easily be

deducted from real loans in Compute Totals to arrive at actual ILL documents delivered to Borrowers.

Once the item has been added, it will show up in the Library Billing Grid as follows:

and on the invoice:

It might also be smart to include an insert describing the reason for the charge, and the method by which it could be averted (EFTS or IFM, etc.).

Fixing Library Charges Before Invoice Printing

The situation: I am encountering a problem regarding the fee that our library charges for ILLs. We charge $5.50 for interlibrary loan requests from other libraries, whether we send them via surface mail or fax.

 I have specified this fee on our library's setup form on QuickDOC and have selected it as the default charge profile.

When I preview invoices or just view a listing of the items we have sent, QuickDOC lists our charges as $9.00 and $12.00 (fees listed in the NLM profile). How can I change this?

You should have a **Library Charge Profile** that represents that charge schedule (named something like 5.5Lib, and showing a Charge for Borrow of 5.50, Charge for Loan of 5.50 and everything else at 0). You can set this up by adding that profile under Setup on the Menu Bar, **Edit Library Charge Profiles**. Just type in the new name (5.5Lib) and add the values.

Once the profile exists, click Setup and then Setup Form, and choose the 5.5Lib profile from the dropdown box. This will make 5.50 your default charge FOR NEW LIBRARIES being created.

For those already created, though, with a different charge profile on the Charges Tab, you will have to make the change on each.

The best way to do this is on the fly. Watch the CHRG column on any new Receipt or Borrow. If you see one that says 9.00 or 12.00, and which should be 5.50, you'll know that this is one that hasn't been changed. Click on the LIBID cell for that row; this will expose a 'To Libs' button on the upper right. Click 'To Libs' and then the Charges Tab on the Library record. Change the charge profile to 5.5Lib and click Ok. This will set it up properly for the future.

We're now back on the Grid. Double-click on the 9.00 or 12.00 CHRG and change it manually to 5.50. You can also search for that LIBID and change any older ones also, as long as they haven't already been invoiced or paid.

Repeat for the next Library that needs to be updated.

Changing Library Charge after Invoice or EFTS Upload not allowed

Once an invoice is printed, or an EFTS Upload File has been created for a Library, you'll get an error message ("**Change $ not allowed here! First change back to Filled**") if you try to change the charge field. In the case below, we tried to change the $10.00 charge to $11.00:

The same will occur if the Status were Uploaded to EFTS. To reset the charge (assuming you haven't already sent out the Invoice), go to the Library Billing Grid (if you're not already there), Delete the Invoice (see above), change the charge and re-run the Invoice for that Library.

Show ALL Items in the Library Billing Grid

In the Library Billing Grid, **No Charge (0.00) Items** are usually **excluded** in the records retrieved. Items must have a charge assigned in order to appear in the Grid. In some cases, though, you may want to see ALL of a Library's items for a certain period, to be sure that all items for which a charge should apply were actually charged as specified.

You can cause the Library Billing Grid to **show FREE items as well as charged items** by checking the **Also Show 0.00 Items checkbox**.

The same search, run with the checkbox unchecked, would have retrieved only 21 items for COUCOL.

Invoice Troubleshooting

The box at the top, where the Return Address, etc., should be, is empty.

First check under '**Setup**' and '**Billing Setup**' on the Menu Bar, to be sure you have values entered for the return address, etc. If these values are there (and they appear in Print Preview but not on the actual printout), then the **missing Invoice return address** values are probably the result of a layering mismatch when your printer prints the page. This seems to work for HP printers with the problem, and may wprk with others:

1. Click **Start,** then **Settings**, then **Printers** on the Win9x desktop.
2. Right-click your default printer and choose '**Properties**'.
3. Click the '**Graphics**' Tab to show the Graphics info form.

In the box at the bottom you have a choice of **'Graphics Mode'** with two option buttons: Raster Graphics and Vector Graphics. The 'What's This?' help for Vector Graphics reads:

Controls how the printing information is rendered by your printer. Using Vector Graphics can significantly increase printing speed. However, if you have problems, *such as incorrect overlaying*, trying choosing Raster Graphics.

[Italics added.] "Incorrect overlaying..." sounds about right. When we changed from Vector Graphics to Raster Graphics on our HP5, the address and other data miraculously appeared.

If all else fails, though, simply check the **Suppress Invoice Box** checkbox on the **Billing Setup** form.

It's easy enough to sacrifice the fancy box, if it obscures what lies within. Once you've registered this choice, the Invoice will be printed without the surrounding box.

Payments

Payments can be made using a variety of **Payment Methods** and **Payment Types**.

Payment Methods

These appear in a Dropdown Combo Box on the Payment Information Form, and include the usual methods of payment: Check, Credit, Cash, AMEX, Visa, MasterCard, EFTS, IFM, Transfer and others.

The Payment Methods Table is crucial to much of the database work, so please don't discard this Table (it has happened once or twice in the past). As with any necessary table, the absence of this table will interfere with normal QuickDOC processing.   If you have to re-create the tblPmtMethods Table, the default values are as follows:

1. AMEX
2. Cash
3. Check
4. Credit (non-cash credit for an item---usually a result of a matching Borrow)
5. EFTS
6. IFM
7. Invoice
8. MasterCard
9. Other
10. Transfer
11. Visa
12. Deposit Acct.
13. Request (by Request Number)

Payment Types

These include:

1. Invoice
2. Credit (non-cash credit to a Library---better to use a "Free Items Before Charge" type Profile)
3. Deposit Acct
4. EFTS
5. Other
6. Request (by Request Number)

Payments of all types may be made using the **Billing, EFTS** Menu Bar choice, **Payments**.
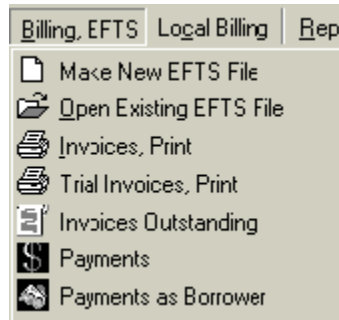
Payments By Invoice Number

From the Billing, EFTS Menu

This is the default when arriving for **Payments from the Billing, EFTS Menu**. All unpaid Invoices (along with choices for **Deposit Account** and **Credit**) are listed in the **Invoice Number Dropdown Combo Box**.

If you start typing in the Invoice Number Combo Box (and type at the rate of about a letter every .5 second or so), the box will open up at the sixth letter typed to the spot on the **Invoice List** where that Library's invoices begin (or close to it). Choosing the invoice and moving to the next field (either by pressing ENTER or clicking on it) automatically fills in most of the form: the Payment Library, the Payment Amount (as a default equal to either the Invoice Total or the Invoice Total less any previous payments, if there were any), the Payment Date (today) and a default for Payment Method (Check). Any of these can be changed, as needed.

From the Invoice Column on the Library Billing Grid

You can also **pay an Invoice from the Library Billing Grid**, by clicking on the Invoice to pay in the Grid's **Invoice column** and then the **'To Pmts'** button, but paying from the Billing, EFTS menu might be a bit faster, since the various Grid values don't have to be re-calculated and displayed after the payment is registered.

EFTS Payments

All **EFTS Uploads not yet paid are listed in the Invoice Combo Box of the Add Payment Form**. Payments are made on these in the same fashion as payments on Invoices.

If the **payment from EFTS is less than the amount projected in the Upload File**, perhaps because a Borrowing Library no longer has an account, do the following:

1.   Search in the **Library Billing Grid**, By Library, for that non-EFTS Library with Begin and End Dates the same as those of the EFTS Upload being reconciled. Edit that Library's activity in the Library Billing Grid from Uploaded back to Filled (you can do this by editing the top column back to F from Uploaded and then clicking the column header to globally change every cell in the column below to Filled). **Always do this for ALL non-EFTS Libraries BEFORE registering the EFTS Payment.** This will also decrease the EFTS Payment expected by a like amount.

2.   Print an Invoice for the Library, when you've reset the items back to filled, by clicking the **'Create Invoice By Library'** Ribbon Button and then the **'Search'** button. This will gather the qualifying records and clicking **'Print Invoice'** will send them to the printer using the last settings you used when printing Invoices.

3.   Once all non-reimbursing EFTS items have been edited, and proper invoices printed for those libraries, register the EFTS payment as usual on the Payments Form, either by exiting the Grid and choosing **'Payments'** from the Billing, EFTS Menu or by clicking in the **Invoice column** at the far right on the Library Billing Grid where the value is the name of the EFTS Upload file you want to pay. Once there, click **'To Pmts'** to get to the Payments Form.

This method will ensure that payments from that EFTS check, when it is finally registered on the Payments Form, will then be directed to the proper EFTS items in the list.

EFTS Credits are created to balance charges previously subtracted in error from a Borrower's EFTS account. The original item will still be carried as Paid, at the charge first uploaded; the EFTS Credit Item is a separate item in the Lend Items file, with a negative charge to match the amount credited. Once it is uploaded with the next EFTS Upload, it will be "paid" along with the other items in the check received as a result. See the EFTS Add Credit Form for more information.

Partial Payments on Invoices

Partial payments are filed with the Invoice, but the invoice is left open for future activity. Partial payments are reflected in item activity up to the last full payment for each item. If there isn't enough left over to fully pay the item, it's left marked as "Invoiced" rather than "Paid" although the full payment amount is applied to the Invoice itself. In the following example, Invoice MAUHLO 0021 has had a payment of $25.00 applied to the full Invoice Total of $37.00. Searching the Invoice Number on the Library Billing Grid gives this presentation:

	Search By Borrower (LIBID)	Show EFTS Upload Items	Create Invoice By Borrower	Search By Status of Request	Search By Invoice No.	Search	By Dates	Reprint Invoice	To Pmnts	Exit

voices [Containing ▼] [0021]   7 Record(s) retrieved

Associated With This Request. Field is NOT n Grid. If a value is present, Click 'Reprint' to Print nts' to Pay. May Also Show EFTS Upload File

Billing Grid by Default captures only items with Charges Attached. Press <F2> (or Left-Click) To Edit Field.

Billing Items With Invoice Containing 0021

	Borrower	Year	Title	Chrg	Type	EFTS	Acted	Paid On	Status	Deliv	Source	Invoi
	MAUHLO ▼	1999	Cell.	$3.00	Journal	No	15-Nov-00		Invoice	Mail	DOCLINE	MAUI
	MAUHLO ▼	1999	Cell.	$11.00	Journal	No	15-Nov-00		Invoice	Mail	DOCLINE	MAUI
	MAUHLO ▼	1999	Cell.	$11.00	Journal	No	15-Nov-00	12-Feb-(	Paid	Mail	DOCLINE	MAUI
	MAUHLO ▼	1999	Cell.	$3.00	Journal	No	15-Nov-00	12-Feb-(	Paid	Mail	DOCLINE	MAUI
	MAUHLO ▼	1999	Cell.	$3.00	Journal	No	15-Nov-00	12-Feb-(	Paid	Mail	DOCLINE	MAUHLO 0021
	MAUHLO ▼	1999	Aging & menta	$3.00	Journal	No	15-Nov-00	12-Feb-(	Paid	Mail	DOCLINE	MAUI
	MAUHLO ▼	1999	Aging & menta	$3.00	Journal	No	15-Nov-00	12-Feb-(	Paid	Mail	DOCLINE	MAUI

Notice that the payment amount of $25.00 was applied to each request until the charge for the request was greater than the amount left over from the payment (the requests will be marked paid in chronological order, but since these were all on the same day it doesn't matter). The $11.00 charge in the second row exceeded the $2.00 left from the $25.00 payment after the bottom five rows were marked. Since this $2.00 credit remains with the Invoice, it will be fully paid with another payment of $12.00 (even though it looks like they owe $14.00, from the display above).

An easy way to check this would be to click the '**Reprint Invoice**' button, which will result in a reprint of all seven items, but with the **Invoice Total: $12.00** at the top (rather than the original $37.00) and at the end, rather than the usual "Total Charges: $37.00" that completes a first invoice, there will be three lines at the end of a Reprint with payments applied:

<div align="center">

Total Charges: $37.00

Amount Paid: $25.00

Amount Due: $12.00

</div>

The **Reprint Invoice button can be used in this way to fire off a quick reminder** of an underpayment, as well as a second notice when there is no payment at all.

When the final payment is received and the Payment form brought up again to that invoice number, information from the first payment will reappear:

Payment Information

Invoice Number: MAUHLO 0021

This is a single Request Number payment. ☐

Previous Payments: $25.00   Inv Total: $37.00   Payment Type is Invoice

Amount This Payment: 12.00   Payment Method: Check

Paid By (Library, EFTS): MAUHLO   Payment Date: Feb 12, 2001

Payment Notes: 1st payment 0021

Enter Amount Paid. Must be greater than 0.   Numbers Only! (Use the 'Credit' Payment Method if no actual payment was received.)

Add Record   Exit w/o Saving   Clear Form   Delete Payment

The Payment Note shows the note left with the first payment, for information only, and will be changed when filing this second payment. The '**Add Record**' button will be enabled once the suggested "12.00" payment amount is accepted (by pressing ENTER or moving to another field) or some other value is entered instead.

Delete Payment made to Invoice

If a previous payment is shown on the Payment Form, it can be deleted and then re-entered by clicking the '**Delete Payment**' button. If more than one payment has been applied to this invoice, the last payment applied is the one queued up for deleting. In the case of the form above, where we're poised to add the final 12.00 payment, clicking 'Delete Payment' brings the previous payment up for possible deletion. Check the Message Box information carefully to be sure the proper payment is being deleted (although it's easy enough to add it back in again if you make a mistake):

Deleting Payment Number: Pmt000049

Ready to Delete This Payment: Pmt000049 for $25.00
Payment will be deleted permanently and values set back to Filled for all Requests.

Okay To Delete?

OK   Cancel

It's the previous $25.00 payment, in the case above, that has been queued up for deletion. When a payment is deleted, the Invoice is restored to its previous values, and any requests that had been marked "Paid" are reset back to "Invoiced."

Payments By Deposit Account

Use the '**Deposit Account**' choice in the Invoices Dropdown Combo Box on the Payments form to register a payment as a **Deposit Account payment**. Right after the payment is added, QuickDOC performs a search to see if there any outstanding items still marked as Filled that might be paid from this deposit. It won't alter any items that have already been changed to "Invoiced" or "Uploaded to EFTS" but it will go ahead and pay off any non-uploaded Filled Requests, even if their EFTS flag is set to Yes. This makes the assumption that, even if the Library is an EFTS customer, it makes sense to first debit the Deposit Account before returning to payments made from EFTS Upload events. A bird in the hand, etc.

Items paid from Deposit Accounts are available for searching via the Invoices column of the Library Billing Grid, since notations are made there when items are deducted from a Deposit Account, referencing the Deposit Account number. A search on this field is a quick way to get a list and printout of any items charged to specific Deposit Account:

There is also a **table of Deposit Account activity (tblDeposits)**, with individual line items for each activity item.

Deposit Account Automatic Payment of Items begins within the year.

After the Deposit Acct payment is registered, unpaid Filled requests are paid from the **Deposit Account payment beginning** either **six months prior to Today's Date, or at the beginning of the current year, whichever is greater**. This is to prevent this year's Deposit Account payment from being applied to a superannuated request that might have been left at Filled some years previously. You can cause earlier requests to be paid from the Deposit Account by marking them as Paid in the Library Billing Grid. Items changed to **Paid** on the Grid are always first checked against a Deposit or Credit Account balance and assigned to that payment if possible.

Delete or Adjust Deposit Account Payment.

If a mistake is made when entering a Deposit Account payment, you can **delete or adjust the deposit payment itself** (rather than each item assigned to the account) as follows:

Payment Information

Deposit Acct payment Number

Request Number: Dep000120

Payment by Request No., Deposit or Credit Acct ☑

Payment Type is Deposit
Last Payment: Dep000120 = $58.00

Previous Payments: $58.00 Req Total: $58.00

ptures only items with
s <F2> (or Left-Click)

Amount This Payment: 58.00

Payment Method: Check

Paid By (Library, EFTS): MAUCOM

Payment Date: Mar 03, 2001

Payment Notes: Deposit acct check for 58.00

Changing the Payment Amount here from its original $58.00 to a new value will change the Payment Amount registered in the system.

Print Recs   To Pmts

Source	Invoice
OCLINE	Dep000120
OCLINE	Credit00012
OCLINE	Credit00012
OCLINE	Credit00012
OCLINE	Credit00012
OCLINE	
OCLINE	

Adjust Payment   Back   Clear Form   Delete Payment

1. Get to the Payments Form either from the Library Billing Grid or Billing, EFTS Menu.

2. Uncheck the '**Payment by Request No., Deposit or Credit Acct**' box, if it's checked.

3. Enter the **Deposit Account payment number** (usually something like Dep000123) in the box to the left and press ENTER.

4. Either edit the '**Amount This Payment**' box, or click '**Delete Payment**' to begin again.

Deleting and re-entering is probably the preferred method, in which case all the values of the payment will be new. If you choose to edit the payment amount, only that value will change in the payment record. In both cases, any rollbacks or additions to items paid will be performed on requests affected.

Payments By Credit

The **Credit payment** is another choice available in the Invoices Combo Box. It's usually used as a way to input a reduction in charge, usually as a result of a reciprocal agreement, where the cost of items we've borrowed from you are used to adjust our charge for items we've loaned to you. It can be used as an unofficial Deposit Account where, for example, a Borrowing Library can be assigned $200 worth of free items at the beginning of the year. Then, as items are provided to this library, the charge normally applied is instead deducted from the January credit total. When the credit total is used up, items begin showing up as candidates for either Invoices or EFTS uploads.

There's no line item table for these events---although there is a tblCredits that keeps just the running total. These are paired off with matching items that can thereby be marked as Paid as they occur. On the Library Billing Grid, the Invoice column for these items will have a notation of "Credit" plus the Library name.

Items are deducted from the Credits Table only if there's enough in there for that library to cover the total charge of the request. As with Deposit Accounts, requests paid from the Credits Table are marked Paid automatically, at the time they're updated as filled on DOCLINE, using the Charge that was filed with the request when it was Received. It will be a good idea to make sure that these charges are the correct ones, although incorrect charges can be changed at any time (if a charge is changed on any Grid for an item that has been marked as Paid from a Credit account, that change will be percolated back into the **Credits Table**---and Deposits Table for Deposit Accounts---at the time the change is recorded).

If the remainder in the Credit Table is less than the cost of the item, it just sits there, waiting for an item it can cover, and the uncovered item remains marked "Filled" and is a candidate for the next Invoice run or EFTS upload.

If you choose **Credit as the Payment Type** from the dropdown box, also choose **Credit from the Payment Methods combo**. This will be useful later for determining actual cash income (as opposed to barter income) received as a result of Document Delivery activity.

It's not even necessary that there be a balance in the Credits Table for a Borrower to be assigned a credit for a filled request. To assign an *ad hoc* credit for a request, you can either change the cost to FREE or, to keep a notice that this was actually a credit for the Borrower, assign the credit through the Library Billing Grid. First use the Library Billing Grid to get a list of items loaned to the library that will receive the credit. Click on a row with the item to be credited in the Grid, and then click the '**To Pmts**' button on the upper right. This will bring up the Payments Form with the Request information already filled in. Choose Payment Method "Credit" and the proper entries will be made.

Credit Payments always start with current year items.

After the Credit payment is registered, unpaid Filled requests are paid from the **Credit payment starting at the beginning of the current year**. This is to prevent this year's Credit payment from being applied to an item from last year that might have been left at Filled for other reasons. Credit payments are always assumed to be for the current year. You can cause earlier requests to be paid from the Credit by marking them as Paid in the Library Billing Grid. Items changed to **Paid** on the Grid are always first checked against a Credit or Deposit Account balance and assigned to that payment if possible.

Credit Payment Type vs. Credit Payment Method

The **Credit Payment Type** appears in the Invoice Combo Box, along with Deposit Account, as a choice along with the list of all unpaid Invoices and EFTS Upload files. The **Credit Payment Method** appears in the Payment Methods Combo List.

If you enter an amount with the **Credit Payment Type**, it will be added to the total available for the Library making the payment in the **Credits Table**. The Payment Method might be Check or AMEX or Transfer or whatever (even Credit, although this choice will cause the inference that no funds actually changed hands). If you use the **Credit Payment Method** with a Payment Type other than Credit, the payment will be applied to the Request, Invoice or Upload cited, but no change will be made to the balance, if any, in the **Credits Table**.

Some typical uses of the **Credit Payment Method** appear in the Table below:

Payment Amt	Payment Type	Method	Result
$100.00	Credit	Credit	Charge for any outstanding items will be subtracted first and those items marked as paid; remainder added to Credits Table
$100.00	Request	Credit	Cost of Request deducted from payment amount and item marked paid; remainder of credit discarded as unused.
$100.00	Invoice	Credit	Unpaid Invoice Charges assigned as paid from payment amount (up to total of payment) and items affected marked paid; remainder of credit, if any, is discarded as unused.

$100.00	Deposit Account	Credit	Since no actual payment took place, use the Payment Type **Credit**, as in the top row, above, instead of Deposit Account.

Delete or Adjust Credit Account Payment.

If a mistake is made when entering a Credit Account payment, the payment itself (rather than each item assigned to the account) can be deleted or edited as follows:

1. Get to the Payments Form either from the Library Billing Grid or Billing, EFTS Menu.

2. Uncheck the '**Payment by Request No., Deposit or Credit Acct**' box, if it's checked.

3. Enter the **Credit Account payment number** (usually something like Credit000123) in the box to the left and press ENTER.

4. Either edit the '**Amount This Payment**' box, or click '**Delete Payment**' to begin again.

Deleting and re-entering is absolutely the preferred method for editing credits, in which case all the values of the payment will be new. If you choose to edit the payment amount, only that value will change in the payment record. In both cases, any rollbacks or additions to items paid will be performed on requests affected.

Payments By Request Number

Payments by Request Number can be recorded on the Payments Form, **from the Billing, EFTS menu**, by clicking on the "**single Request Number**" check box and typing in the Request Number itself, but it's a bit easier to do it **from the Library Billing Grid** or even the **Lend Item Backfile Grid**. Click on the row with the item to be paid in the Grid, and then click the '**To Pmts**' button on the upper right. This will bring up the Payments Form with the Request information already filled in. Choose the appropriate Payment Method and amount, etc., then click '**Add Payment**' to save. The Payment Number assigned will be available in the Invoice column of the Library Billing Grid.

Marking an item as Paid in the Status column of Grid

You can record a quick **payment by changing the Status column on either the Library Billing or Lend Item Backfile Grid** directly, editing it from Filled to Paid. The '**Paid On**' column will be changed automatically to Today's Date, if left blank, or it can also be changed before filing---using either the calendar dropdown or by entering the date correctly---to the correct date for that payment.

If your own Library record indicates that you participate in OCLC's IFM system, you will be asked whether this payment is an IFM payment:
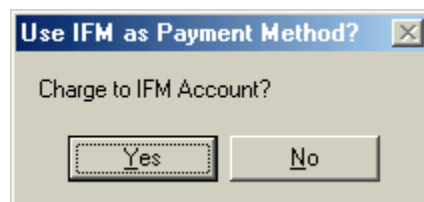
If it is, you will also get a chance to input a note regarding the IFM payment. This item will be filed in the tblPayments Table as **Payment Method IFM**.

Non-IFM items marked as Paid in this way have no other supporting information (no Check Number in Notes, no specific Payment information). A payment entry is recorded, though, with

the Request Number as identifier, **Payment Method Other** and Payment Amount equal to the Request Charge.

The **Payment Type** for both IFM and Other payments is **Request**. It is also assigned a **Payment Number**, which will appear in the Invoice Column of the Grid:

Items marked as Paid in this fashion are still run by the Credits and Deposits Tables, to see whether the amounts should be deducted from these totals, but no other checks are made. The Payment Method "Other" may represent a real payment or a credit; since there's no way to tell for sure, it's assumed to be a true payment.

Any payment can be edited later to correct payment amounts only, or simply deleted and re-posted to correct any and all values.

Marking an item as Paid by entering a Date Paid

You can also record a quick **payment by entering a value in the DTPD column on the Library Billing Grid** directly; this will cause the Status to be changed to Paid when the row is saved, along with all the other activities described under the Status change, above.

Payments as Borrower

Beginning with Version 2.2.x, Payments as Borrower can be entered using the Payments as Borrower choice on the Billing, EFTS Menu.
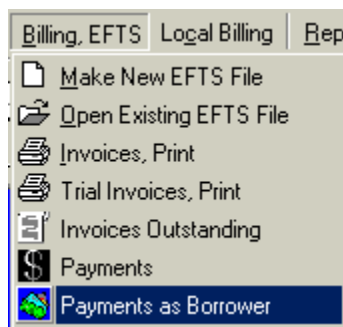
This choice brings up the **Payments To Lenders (and EFTS)** form. This method of access is best used for entering **Library Deposit Account** payments and payments to **EFTS Deposit**

Accounts. See the EFTS Payments as Borrower entry under EFTS Activity for information on EFTS Deposits.

Use the Payments to Lenders form to enter a **Lending Library Deposit Account** deposit 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.

The Payments to Lenders form is also accessible from the **Borrow Items Backfile Grid**, by clicking into the **Chrg** field and then clicking the **To Pmts** button at the upper right. This method is the easiest and most efficient way to post payments to Lenders for individual requests. See the **Marking Paid Borrow Grid records** entry under Borrow Function for information on payments from the Borrow Items Grid.

EFTS Activity

EFTS File Uploads

Criteria for inclusion in an EFTS Upload File

As with Invoices, there are certain **criteria that determine whether an item is included in an EFTS Upload file**.

1. **Borrower** must be an **EFTS Library** (its **EFTS Payment Supported checkbox**, on the Charges Tab of the Library record, should be checked).

2. **Your Library** must be an **EFTS Library** (your **EFTS Payment Supported checkbox** should be checked).

3. The item must have a **Charge** (or Credit) other than 0.00

4. **EFTS** must be **Yes** on the item record.

5. **Status** must read **Filled**.

6. The item must have been **Acted Upon during the time period in question.**

If any one of these criteria is not met, the item won't be included in the upload. If there are no items in the time period specified that meet all three criteria, you'll see the following Message Box:
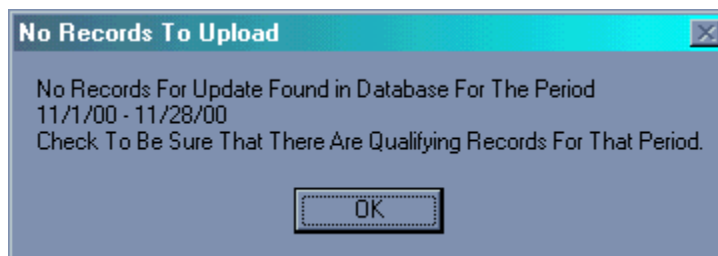
Steps for Creating the EFTS Upload File

Before creating the file, you can **use the Billing Grid to determine which items will be included in the EFTS upload**. Set the Dates for the Upload and click the **Show EFTS Upload Items Ribbon Button**. The default search criteria will appear in the box to the right.

These are the items that will be included in the upload file as the values currently stand.

In order to be sure that items that should have been included in the upload file weren't left off because one of the required values has been set improperly, you can also search the '**Show EFTS Upload Items**' Ribbon Button with a value **Not Equal To TRUE**. This setting attempts to show records that display common characteristics of misfiled EFTS requests, including: items marked EFTS but with a charge equal to FREE; items with a charge but with EFTS = No; and also any item whose status is **Invoiced, Uploaded** or **Paid**, since these also will not be included in an upload. The **'Not Equal To True'** setting will produce a list something like this one:

The list is sorted first by status since the Filled requests are the more likely candidates for change (those marked Invoiced, Uploaded or Paid were most likely set that way on purpose, but they're included here primarily to answer questions as to whether an earlier upload might have been done, or whether Invoices might have been produced for certain Libraries, which would have removed them for consideration during the preparation of the Upload File). The state of the **Also Show 0.00 checkbox** has **no effect** on this display.

In the case above, if the two TXUMHD requests should have been charged a $10.00 fee instead of the FREE displayed, you can edit the CHRG cells to $10.00 to make them eligible for the Upload file. If the Max Cost field for these requests is less than $10.00, a message box will let you know. It is also possible to check the Max Cost Value on the Grid by exposing the Max Cost column itself, which is normally hidden on the Billing Grid but which is always there nonetheless.

Exposing the Max Cost Column on the Billing Grid

There are in fact two columns hiding between the '**Delivery Method**' and '**Source**' columns, above: ISSN and Max Cost. If you drag the vertical line between **Deliv** and **Source** to the right, you'll first expose the ISSN column. Since we're not interested in this column at present, only a wee bit of it needs to be seen. If you let go of the left mouse button you've used to grab the first header border, and use it to grab the newly exposed border between **ISSN** and **Source**, you'll **uncover the Max Cost field**.

 As you can see below, the **Max Cost** was $11.00, so editing of the two requests to a Charge of $3.00 will be permitted (the **Max Cost field is not an editable field**, by the way, so you can't unilaterally change the Max Cost to meet your charge; according to general DOCLINE guidelines, if your charge is greater than the Max Cost attached to the request, you shouldn't fill it).

es: 01-Aug-00 to 31-Aug-00						
Acted	Paid On	Status	Deliv	I	Max	Sourc
8/31/00		Filled	Fax	'	$11.0	DOCLI
8/31/00		Filled	Mail		$11.0	DOCLI

ISSN Column ———→ Grab this and drag to the right

You can edit values on the Grid and try again, but be careful not to upload the same item twice (although duplicates will be weeded out at the EFTS end, it just confuses the issue to have them there).

If you use the **Billing Grid's 'Show EFTS Upload Items',** you get a streamlined version of the steps to take in preparing an upload file for activity during any period selected. For a display of all items during the period in question, you can use the **Search All Grid** to get the complete population of requests, and can then do editing on those that need it. Also, once you have the dates set here, experiment with limiting the set by various search criteria, to see whether the subset delivered meets your expectations. Some examples:

1. Check **Status Equals Filled** to see if the number returned seems about right.

2. Check **Status Equals Uploaded** or **Invoiced** to see if operations have already occurred against this group.

3. Check **Charge Equals FREE** to see if there are requests in the group for which there should have been a charge that were mistakenly filed as FREE.

4. Search **Specific Borrowers**---those that may have been problematic in the past---to see how they show up on the Grid [if you click the **Borrower (LIBID) Ribbon Button**, and enter the SERHOLD 3-letter code in the Search Box, along with **Containing** as the search criterion, you'll get a quick list of all items for that library during the time in question].

5. Search **EFTS Not Equal To TRUE** to see whether any of these requests are actually eligible for EFTS uploads (the set returned should be sorted by Borrower to provide for quick scanning.

6. Search **EFTS Equals TRUE** just before creating the upload file, to weed out any outside libraries that may have made it onto the list. Non-EFTS Libraries whose items are mistakenly labeled EFTS = TRUE won't be picked up on Invoices, so it makes sense to make this value as accurate as possible.

On the following Grid display, for example, none of these items would qualify for an EFTS Upload File, for the reasons enumerated:

Only 3 items are (EFTS = Yes) and two of these were already uploaded while the other is Not Filled. Charge of FREE will be excluded, etc.

Once you've checked the file and made any changes necessary in preparation for the upload, use the Menu Bar choice under **Billing, EFTS** to **Make New EFTS File**, which loads the Create EFTS Upload form.
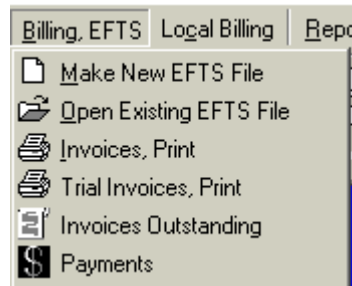
The Create EFTS File Form

The **Make EFTS Form creates the EFTS upload file** for the period specified. Statistics for the upload file are displayed when it's finished.
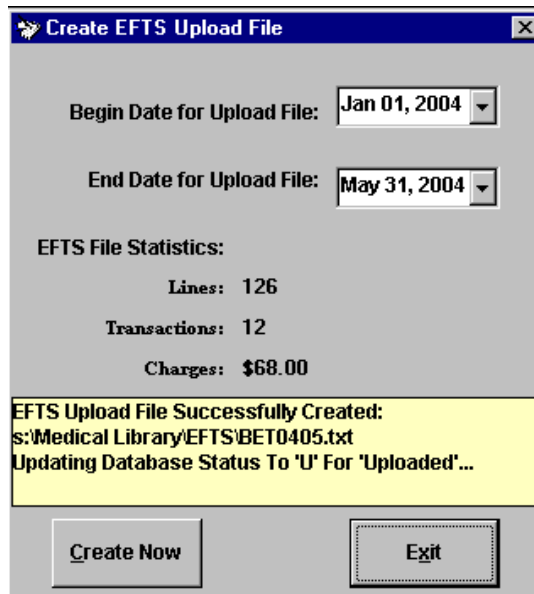
As you can see, in the last sentence of the yellow status box above, the creation of the EFTS Upload File by QuickDOC will also change the Status of all the items in the file from **Filled** to **Uploaded** (even though the actual uploading has not yet taken place).

The EFTS File List Form

The **EFTS File List Form gives access to EFTS files created**. Once the files are made, you can check them out and even do a little light editing, though I wouldn't recommend being too adventuresome.
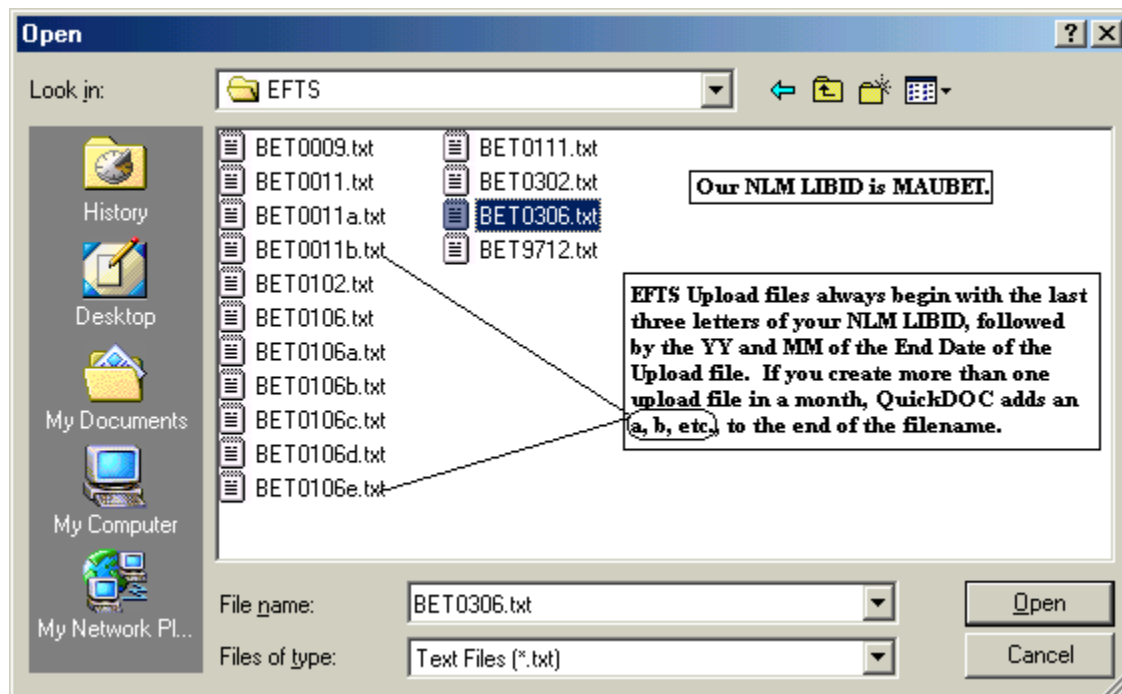
If you choose to open the BET0009.txt file, above, it would look like this:

144.


```
C:\Program Files\Microsoft Visual Studio\VB98\QuickDOC\EFTS\BET0009.txt

SHID=BET                    The EFTS Upload File includes:
LIBID=MAUBET
000904                      SERHOLD ID (last 3 letters of LIBID)
000930
*BEGUPLOAD                  Begin Date of Upload
RQNO: 708737                End Date of Upload
YRTI: 2000 Pediatric infec
AUCI: Sep;19(9):871-4       Request Information:
PATR: Daly, Jay [5]
CHRG: 11.00                 RQNO: begins each request item.
FORM: C
DTFL: 000923                Date Filled is in YYMMDD format
BORR: MAUBET
SRCE: DOCLINE               *ENDREC marks the end of each item.
*ENDREC
RQNO: 708735
YRTI: 2000 Neurology.
AUCI: 55(5 Suppl 1):S41-6;

Refrain from making any change that would affect the number of lines, as it may make the Upload File
```

Upload EFTS File

In January of 2004 (revised again in the summer of 2005 and, no doubt, will be again later), EFTS put in place a new method of uploading files (originally described in a posting on the **EFTS-L Listserv**). It's a good idea to have at least one staff member subscribe to EFTS-L, which is used for announcements of interest to EFTS participants. Details are at http://efts.uchc.edu):

Once you've created the file, the steps for uploading data to your **EFTS Online account** are as follows:

1. Login to your account on the EFTS Member Login page

    This can be reached by clicking the Member Login choice on the EFTS Welcome Screen (https://efts.uchc.edu/efts/common/index.html).

Enter your DOCLINE LIBID in the **EFTS User ID** field, and use the **EFTS Password** assigned by EFTS.

2. Go to the Upload File page by clicking the **Transaction File** choice.
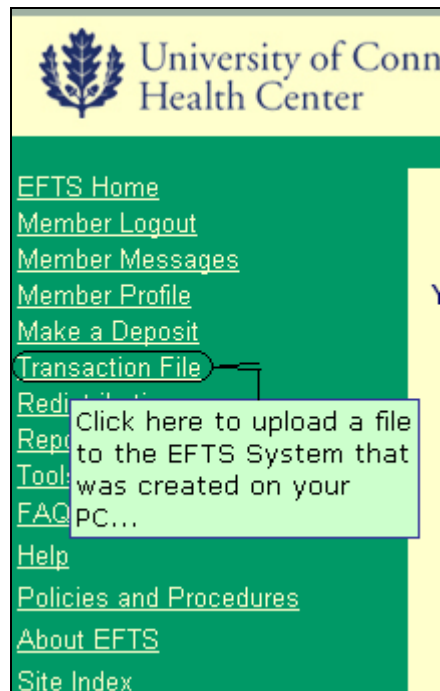
3. Get to the Upload Transaction File screen by clicking that link on the next screen.
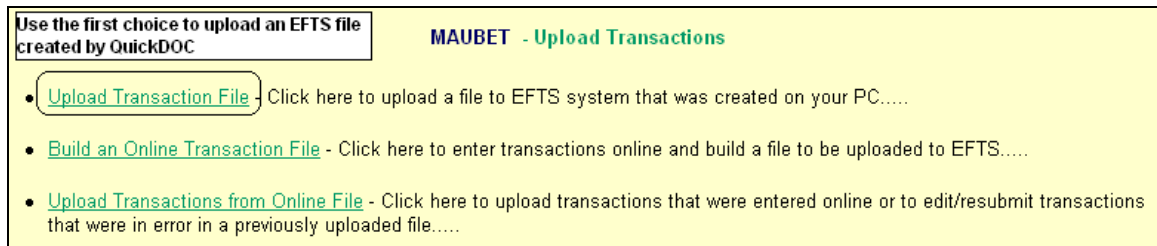
4. Click the **Browse** button to locate the file to upload.
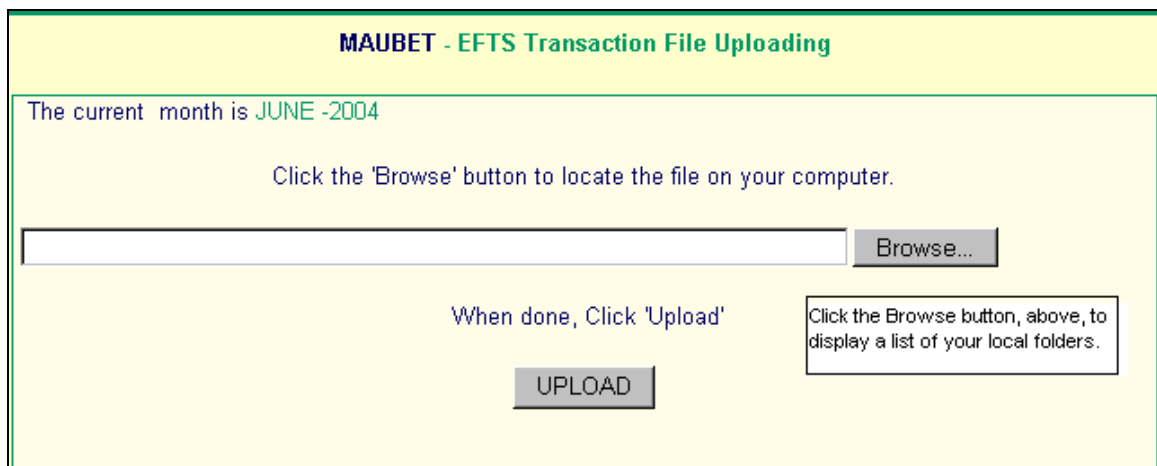
5. Locate the file on your PC [in QuickDOC it's always in the **EFTS folder** just beneath your **QuickDOC.MDB database** location]. First go to the drive where the database is located.
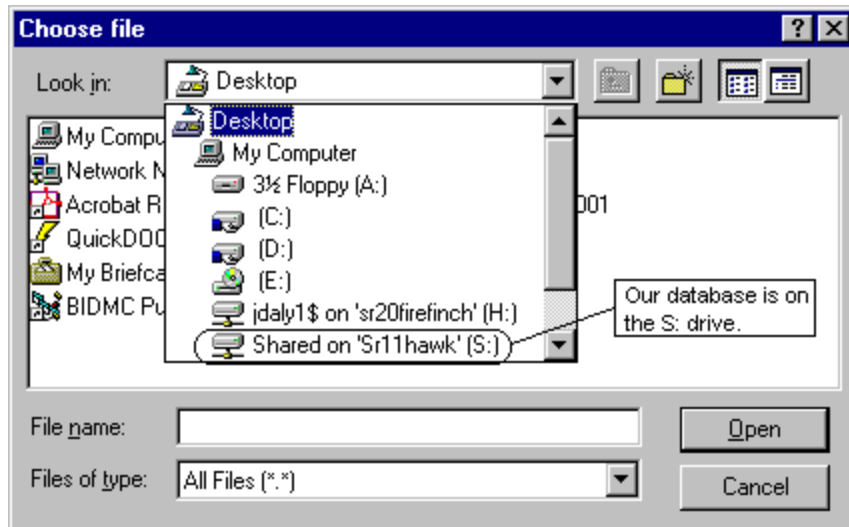
Double-click the Drive icon (S:, in the example, above) to open that drive, and then select the folder where the QuickDOC.MDB database is located (our QuickDOC.MDB database is located in the Medical Library folder on the shared S: drive). Double-clicking that folder icon will expose the files and folders beneath (which will include the EFTS folder).
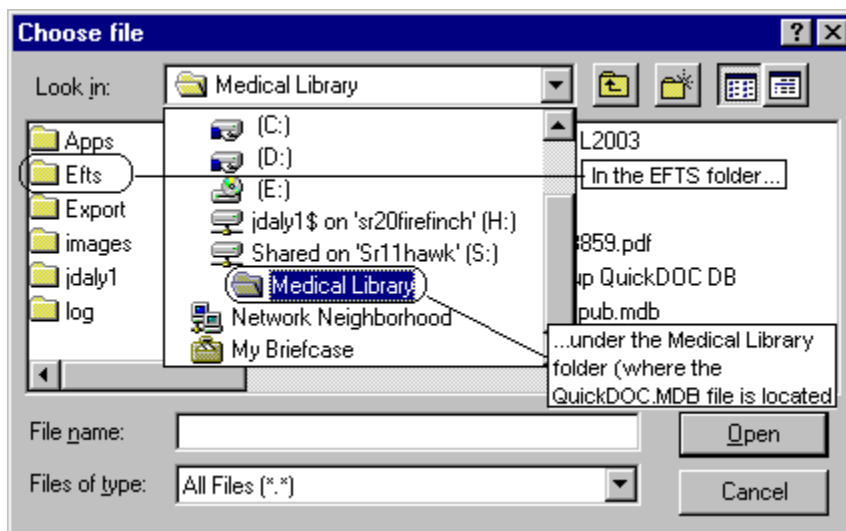
Then double-click the EFTS folder just beneath the QuickDOC.MDB database folder to open it, and click once on the filename you want to upload to place that name in the "File name:" box at the bottom of the form. Click the Open button to move it to the EFTS Upload box.
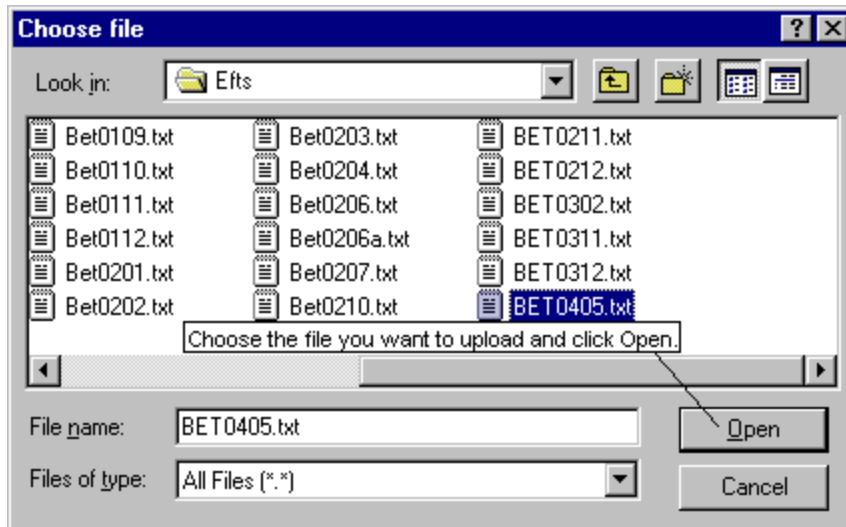
This will put the full path and filename into the upload box on EFTS.

6. Click on the **Upload** button to upload the file

7. Your file will be uploaded and processed, and the results displayed:

Processing happens in real time and should take only a few moments. You will then see a message on a screen similar to the screen displayed above confirming successful processing.

Paying a successful EFTS Upload File

Once we get that message, with no errors, it means that all items from the upload have been paid. We can then logout and exit from the EFTS site, start up QuickDOC, if it isn't already running, and click the **Library Billing Grid** button, to open that grid. In the Library Billing Grid, set with the same dates as those of the EFTS Upload, check the **Invoice column** for any cell with that EFTS Upload filename. Once found, click into that cell to show the **To Pmts** button just above, which can be clicked to record that upload file as **PaidEFTS**.

You can also **pay an EFTS Upload File**, which is like an Invoice, under the **QuickDOC Menu Bar**, **Billing, EFTS**, **Payments**.)

Errors in an EFTS Upload File

Errors in earlier versions (pre-2005) of EFTS. Prior to EFTS Version 3.0, if your upload file contained any transactions that could not be successfully processed (including **Borrower is a Member but Inactive** and other errors relating to a lack of current funds in the EFTS account of your Borrower) the entire file was rejected. For QuickDOC users this was a slight nuisance but easy enough to fix; we just reset all the items in that file back to Filled in the Library Billing Grid (which automatically deletes the upload file), changed the nuisance items to EFTS = No, and then re-created and uploaded the file. *Voila*!

But to non-QuickDOC libraries it was much more bothersome, especially to those who created their own EFTS Upload files. So EFTS 3.0 was created not to reject entire files where only a certain number of items within the file were uploaded in error. Instead it would process the good items, and hold the problematical items in an **Online File**, to be reprocessed as necessary, until they were either successful or deleted by the uploading library. This was a great idea for items that might eventually be paid, but not so good for duplicate uploads, non-EFTS Libraries, etc.

Consequently, if your file contains any transactions that cannot be successfully processed, then you will see a message that tells you what line number the problem is on and what the problem is, e.g., **Transaction previously paid** or some other reason why this last request has not been paid. Successful items will be processed, and ALL unsuccessful items, as of late 2005, will be kept, in a separate file, which will be run again each evening against the database.

The following is an example of an **EFTS Upload Error Description** screen (where I intentionally uploaded eight transactions that had been uploaded before):

MAUBET - Transaction File Upload Results

Results of Uploaded Transaction File BET0502.txt			
Total Processed Transactions :	8	Amount :	$48.00
No of Successful Transactions :	0	Amount :	$0.00
No of Errored Transactions :	8	Amount :	$48.00

Line No	Error Description	Request No	BORR
6	Transaction previously paid	14680717	MAUVBD
16	Transaction previously paid	14686490	MAUVBD
26	Transaction previously paid	14819391	MAUVBD
36	Transaction previously paid	14807679	MAUVBD
46	Transaction previously paid	14807632	MAUVBD
56	Transaction previously paid	14985241	MEUMAN
66	Transaction previously paid	15352157	MAUMGH
76	Transaction previously paid	15902254	MEUMAN

Print   Upload One More File

The errors shown above shouldn't require any action on your part (they've been paid; end of story) but in the current upload process (as of 12/2005), they do. They will stick around until you fix them. Until this process is changed in EFTS, you should definitely print a copy of this screen, so that you can use the printout to delete these items, one-by-one, in EFTS.

EFTS has plans to fix this (they recognize that having to delete these items one-by-one is onerous and should be unnecessary), in the near future, but for the time being we still need to deal with individual **Transaction previously paid** items one-by-one. Use the third choice on the **Upload Transactions menu** that appears when you click **Transaction File** on the left-hand list:

To check your online file, use the 3rd choice, below (QD Users don't need 2nd choice).   **MAUBET - Upload Transactions**

- Upload Transaction File - Click here to upload a file to EFTS system that was created on your PC.....

- Build an Online Transaction File - Click here to enter transactions online and build a file to be uploaded to EFTS.....

- Upload Transactions from Online File - Click here to upload transactions that were entered online or to edit/resubmit transactions that were in error in a previously uploaded file.....

We'll need to delete all previously-paid transactions using the list under the **Upload Transactions from Online File** form, which is where all these unsuccessful uploads are kept. But remember not to delete items that may be paid in the future until you're convinced they have been thoroughly processed.

For **duplicate EFTS uploads** (where **ALL** or **any** of the items show up as **Transaction previously paid**), you don't have to do anything back in QuickDOC; whatever caused that file to be uploaded again (maybe just an unsure uploader), it doesn't change the status in QuickDOC. All we need to do is to remove those items from the Online File.

Unlike the screen above, where Transaction previously paid is prominently displayed for those (admittedly few, eight) transactions, when you go to the **Upload Transactions from Online File** screen, the display changes:

MAUBET - Welcome to Online Transaction Process

The following transactions are ready to be uploaded to EFTS for processing.
1) Edit any files if necessary by clicking on the Request Number.
2) Print out the list of transactions for your records.
3) Delete a transaction from the file by clicking on Delete.
4) RED Request Numbers have been processed before and returned with errors. The System will automatically re-process these every evening. Results will be displayed on Member Messages page.
5) BLUE Request Numbers have never been processed.
6) Light Blue background denotes a transaction originated by online entry.
7) White background denotes a transaction originated from an uploaded file.
8) Click on "Upload Transactions" to submit to EFTS.

Date	Request No.	Year / Title	Borrower	Patron	Charge	Action
11/15/2005	15352157	2002 SEMINARS IN URO	MAUMGH	Thank You!	$11.00	Delete
			Sub Total		$11.00	
11/15/2005	14680717	2003 INT J PSYCHOANA	MAUVBD	Ourada	$3.00	Delete
11/15/2005	14686490	1993 INT J CLINICAL	MAUVBD	Ourada	$3.00	Delete
11/15/2005	14819391	2004 AORN J	MAUVBD		$3.00	Delete
11/15/2005	14807679	1992 NEW ENGLAND J M	MAUVBD	Ourada	$3.00	Delete
11/15/2005	14807632	1992 LANCET	MAUVBD	Ourada	$3.00	Delete
			Sub Total		$15.00	
11/15/2005	14985241	2003 J VASCULAR INTE	MEUMAN	Guzowski, Mich	$11.00	Delete
11/15/2005	15902254	2004 J INT MEDICAL R	MEUMAN	Darby, John	$11.00	Delete
			Sub Total		$22.00	
			Grand Total		$48.00	

[Print - ILL Transactions]   [Upload Transactions]   [Add Another Transaction]

All this screen shows is the bibliographic data, with no indication as to why any of these items were rejected by EFTS. Consequently, you either have to click the Request number to find out why it's still here (as in 15352157, above):

MAUBET - Welcome to Online Transaction Entry

Build an EFTS transaction file online.
1) Enter data into fields.
2) Click on "Add to File" button.

* Requestor's LIBID e.g. ARUARK	MAUMGH
* Request Number e.g. 1452347894	15352157
* Year and Journal or Book Title e.g. 1998 Int J Oncology	2002 SEMINARS IN URO
* Author or Citation of the Loan e.g. 13(4):659-64	FEB;20(1):45-54
* Date Filled (YYMMDD) e.g. 031125	041020
Patron	Thank You!
* Charge Type	Charge
* Charge (no $ sign) e.g. 11.35	11.00 $USD

Note: * **is Mandatory Field**

[Add to File]   [Clear All Fields]   [View/Edit Online File Transactions]

Error Field	Request Number	Borrower	Error Description
Request Number	15352157	MAUMGH	Transaction previously paid

In this case, of course, Transaction previously paid means that it's done, and we can delete it. But you'll want to retain the error list displayed with the update file (it can be printed at the time) for any Transaction previously paid items, so that you can delete them without drilling down to the level of detail should above.

And of course if you have errors that aren't duplicates (like **Member but Inactive** or **Insufficient Funds** that suggest there may be a future payment), then you'll want to print and hang onto these as well, not so much to delete them from the **EFTS Online Transaction File** (which you'll no doubt expect that you won't have to) as to decide how to handle these transactions when finally they are paid. This makes dealing with EFTS 3.0, which, on its face, was a simplifying process, a much more complicated undertaking than 2.0, which was easy to deal with.

For **EFTS Uploads with Errors that might later be Paid**, a different strategy is necessary.

1. Keep all the error printouts.

2. For items known to be duplicate uploads, delete them immediately from the EFTS Online Transaction File.

3. For items that may eventually be paid, check the EFTS Online Transaction File periodically to see if they can be checked off.

4. Once all the items in an upload file have been checked off as paid, mark that Upload File as **PaidEFTS** in QuickDOC.

5. If it looks like an item might never be paid, edit that item in the QuickDOC Billing Grid, changing the Status from **Uploaded** to **Filled** (this will subtract the charge for that request from the EFTS Upload invoice) and change **EFTS** for that item to **No**.

6. Once **all items that will never be paid through EFTS** have been changed back to **Filled** from **Uploaded** on any EFTS Upload Invoice, you can mark that EFTS file as Paid.

Items changed back from Uploaded to Filled, with their EFTS value now equal to No, are now available to Library Invoices. Print Invoices either by Library from the Library Billing Grid, or as a part of an Invoice Print, using the appropriate Start and End dates, from the Billing, EFTS choice on the QuickDOC Menu Bar.

Every EFTS user has an **EFTS ID** and **EFTS password** that's used to access the system. You might need to get in touch with EFTS if you can't find paperwork for these values locally.

EFTS Email Address is: efts@uchc.edu.

EFTS Web Site is at: https://efts.uchc.edu/efts/common/index.html

The EFTS Add Credit Form

When an EFTS user has been charged in error during a previous upload, the error is fixed by **adding a credit to the next EFTS upload file**. The easiest way to accomplish this is to first find the item for which you want to register a credit on the Lend Item Backfile Grid. If you double-click into the Request Number field and right-click on it, as was done for 13997426, below, the request number will be selected.

Choose **Copy** from the Context Menu that appears after the right click. Then click the Add New choice on the Menu Bar to get the **Lend Credit** choice.

The Lend Credit choice will bring up the **Add Credit** form. Right-click in the "**Request Number To Search**" box and choose **Paste** (which is where you'll be when it loads) and press **Enter**.

This process **automatically fills in the required fields with information from the original request** (the **EFTS Credit Amount defaults to a credit for whatever the actual charge was** on the original request). The **Acted Date** for this Credit Item will default to **Today's Date**, so that it will be included with other items in the EFTS Upload for the current month.

If this credit corresponds to what you want to send in the next EFTS upload, click **Add Item**; otherwise, edit the amount, etc., and click Add Item.

While you can create a credit unilaterally (i.e., without a Request Number that was initially charged for), it makes sense both for ease of use and comprehensibility to use this method if possible.

If you attempt to add a second credit where one has already been applied (as in the case of Request Number 177994), you'll see a Message box:
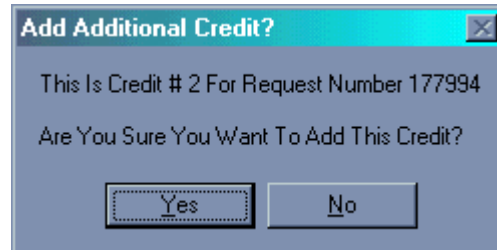
You can click Yes and add the second credit, or you can pull back if it seems that this second one might be a duplicate.

To Verify that the new Credit Item has been added:

To check that the new credit item has been properly filed, get back to the Lend Item Grid and paste that same number (**13997426**, in our non-duplicate example, above) back into the Search Box. Click Search.

You should see both the old Lend Item and the Credit (with a **CR** at the end of the old number). The credit will be the reverse of the old charge (**-3** instead of $**3.00**, unless you've edited it). And the **Acted Date** will be **Today's Date** (the **Status** will be **Filled**), so that it will automatically be included in the next EFTS Upload.

Lend Item Backfile

| Search By Date & ReqNo | Search By Library (LIBID) | Search EFTS Request | Search By Charge | Search By Status of Request | Go To Received Only | | Search | By Dates | Print Recs | Forw |

Search Request Numbers | Containing ▾ | 13997426 | 2 Record(s) retrieved

This search finds both the original loan and the credit.

First Field is Request Number. May Be Up To 14 Characters Long. Must Be Unique in Database.

The Credit charge is a (negative number).

The Acted Date for the Credit is Today's Date, so it will be included in the next EFTS Upload File (6/04 instead of 5/04).

☐ Exclude N

Lend Items With Request Numbers Containing 13997426

▾	ReqNo	Borrower	Year	Title	Chrg	Type	Form	EFTS	Recd	Acted	Status	Deli
☐ ✛	13997426CR	MAUVBD ▾	2004	J general inte	($3.00)	Journ:	Copy	Yes	5/17/2004	6/8/2004	Filled	E-M:
☐ ✛	13997426	MAUVBD ▾	2004	J general inte	$3.00	Journ:	Copy	Yes	5/17/2004	5/17/2004	Upload	E-M:

All the other information about the request will be the same. In statistics, QuickDOC will ignore Lend Credits in terms of total counts of Lend Activity, but will use other values (the -3 against the original $3.00 charge) against any expected receipts or other cost-accounting for Lending.

How To Setup EFTS Routing Table

The July 2002 issue of <u>National Network</u>, the newsletter of MLA's Hospital Libraries Section, has an article by Beth Wescott, Joanne Jahr, and Julie Kwan about **EFTS and DOCLINE Routing Tables**. Here are some of the ideas for EFTS participants from that article:

1. Place libraries with whom you have reciprocal arrangements, and who will not charge you, low in your routing table;

2. Place EFTS libraries low in your routing table, putting those with lower fees before those with higher fees;

3. Put smaller EFTS libraries lower than larger EFTS libraries so that smaller libraries have the opportunity to participate in lending, thereby offsetting their borrowing charges;

4. If some of the EFTS libraries offer a preferred delivery method, such as web or email delivery and you want that method, place them lower in your routing table;

5. If you need special collections, try to find EFTS libraries that have those materials and place them appropriately in your routing table; and,

6. It's generally good practice to ask before adding an out-of-region EFTS library to your routing table.

EFTS Payments as Borrower

EFTS Payments as Borrower can be entered using the Payments as Borrower choice on the Billing, EFTS Menu.
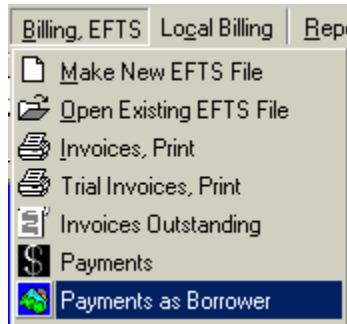
This choice brings up the **Payments To Lenders (and EFTS)** form. This is the method to use when entering payments to **EFTS Deposit Accounts**. See the Payments as Borrower entry under Library Billing for instructions on entering Lending Library Deposit Account deposits.

Entering EFTS Deposits

The Payments to Lenders (and EFTS) form is used primarily to facilitate entry of **EFTS Deposits**, so that QuickDOC can produce the **EFTS Activity** and **EFTS Balances** Reports (see examples under QuickDOC Reports). 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.

Managing EFTS Activity Reports

(Before running your first EFTS Activity Report, you should see *How to set up your initial EFTS Activity Report*, on page 56, above.)

To manage your EFTS account, do the following on a monthly basis (best time to check is to print a copy of the previous month's EFTS Monthly Statement just after you've uploaded the activity for that month):

1. **Print a copy of your EFTS Monthly Statement**. These are under **Reports** on the **EFTS Online Menu** and should be printed at the end of each month. Using the previous month's **Member Monthly Statement**, you can enter the appropriate data.

2. **Enter EFTS Deposit dates and amounts in the Borrow Deposits Table**. Using your printout of the EFTS Monthly Statement, enter any **EFTS Deposit** (which will appear in the **Total Deposits** line at the top of the Monthly Statement) under Billing, EFTS, Payments as Borrower, on the QuickDOC Menu Bar.

In our first example month (07/2004) we had a deposit of $2,000. We enter this deposit under **Billing, EFTS** on the Menu Bar, **Payments as Borrower**:
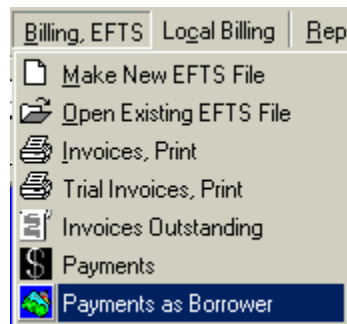
EFTS Deposits are entered using a **Payment Date** during the month on which they show up in the EFTS Monthly Statement. It is recommended that you use **the first of the month** as the default deposit date (any date during the month is okay, but it makes sense to decide upon a common choice---bottom line: **QuickDOC can detect duplicates if they're entered with the same amount during the same month**).   In our case, we'll use a Payment Date of July 1, 2004:

Payments To Lenders (and EFTS)

EFTS Deposit Account Payments are entered as below. Use the 1st day of the month where the deposit appears on your EFTS Statement; Payment Method & Pmt Number EFTS; Library EFTSUP.

Payment Type: Deposit	**Pmt or Request Number:** EFTS
Amount This Payment: 2000.00	**Payment Method:** EFTS
Paid to (Library, EFTSUP): EFTSUP	**Payment Date:** Jul 01, 2004
Payment Notes: EFTS Deposit on Statement 07/2004	

Enter Check Number or other information describing this payment.

Add Payment   **Exit w/o Saving**   **Clear Form**

After clicking Add Payment, you'll see a notice that the payment has been filed.

Payments To Lenders (and EFTS)

Payment # [Dep=000048] Applied to account with Library EFTSUP.

Payment Type: Deposit	**Pmt or Request Number:**
Amount This Payment:	**Payment Method:** EFTS
Paid to (Library, EFTSUP):	**Payment Date:** Jul 01, 2004

All **EFTS Deposit Account Payments** with a Payment Date equal to or after the **EFTS Activity Report Start Date** will be applied to items on or after that date only. Payments with a Payment Date before the EFTS Activity Report Start Date, will be applied to EFTS items from the beginning of EFTS activity.

You can always see the Deposit Account payment to which a request was charged in the **Note field** of the Borrow Item Backfile Grid. To get full information about the payment of that request, click into the Status cell and a **To Pmts** button will appear above. Click **To Pmts** to get additional information.

[You can also get a **Payment Number** or a **Deposit Account Number** by printing an EFTS Activity Report for that period. The **Acct No.** column in that report will show which account made the payment.]

If you make a **mistake in a payment**, especially when entering a request to be charged to an EFTS Deposit Account, it's best to delete the payment and re-enter it. This is because of the large number of inter-related table entries that need to be adjusted for changes. While you can adjust payment amounts on the Payments To Lenders form, changing **Payments Dates for Deposit Account items** can be tricky, especially when accounting for payments either before or after your EFTS Activity Report Start Date, so the only method recommended here is to delete the payment and then add a new one with the appropriate information.

Duplicate Deposit Payments. If you try to enter a Deposit for a certain amount that matches an amount already entered for that month, you'll get a Message Box with an Alert:
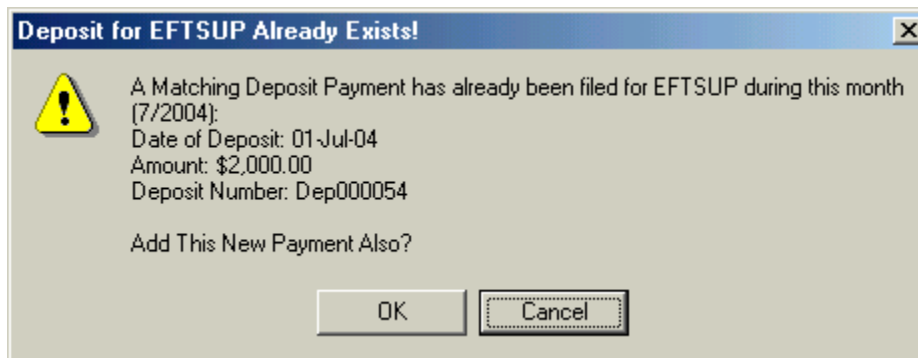
On the assumption that, in most cases, any deposit made in the same month, for the same amount, will be a **duplicate deposit payment**, this message defaults to **Cancel**, but you can also click Ok to let the deposit payment go through if it is truly a separate payment. You can check for all payments by running the EFTS Activity Report to Print Preview, using the beginning of that month as the Start Date (1-Jul-2004 in our case, above).

3. **Mark EFTS Upload Files as Paid**. Once EFTS Upload Files have been accepted on EFTS, you can generally assume that they have been paid (items that prove to be uncollectible by EFTS may later be deducted from your account; these you can handle by changing them from Paid to Filled, and then producing an Invoice to bill the Library involved).

Depending upon your workflow requirements, you can use the Payments Form (**Payments From Borrowing Libraries**) to immediately mark that just-uploaded File as **Paid**, or you can wait until the end of the month and mark it Paid along with all the other end-of-month EFTS adjustments.

As far as the EFTS Activity Report is concerned, it doesn't matter which strategy you use, so long as you use a Paid Date **within the month of the EFTS Monthly Report**. The upload total will be counted as Income under either **EFTS Income as Lender** … in **tblPayments**, (replicated into **tblBorrowDeposits**) or as **EFTS Files Uploaded** … in **tblInvoices**. Either way, the report will see these as income (either realized or accounts payable).

Whichever method you choose, you can mark your EFTS Upload File as Paid in either of two ways:

1. **From the Menu Bar**. Click **Payments** on the dropdown menu after clicking **Billing, EFTS** on the **QuickDOC Menu Bar**. Then, on the **Payments Form**, select the appropriate EFTS Upload file (the one you just uploaded for last month) from the dropdown list in the **Invoice Number combo box**:
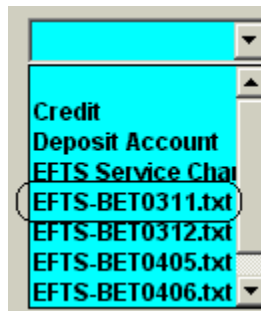
2. **From the Library Billing Grid**. You can also use the **Library Billing Grid** to locate one of the individual loans that appeared in the last upload (these will also appear in the **Detailed Credit Summary** of that month's EFTS Monthly Statement). Check the **Invoice column** at the far right of that row in the **Library Billing Grid** (scrolling right, if necessary, to see it). You'll see the **EFTS Upload Filename** that contained this loan in that column. The current **Status** will be **Uploaded**. Click once into the **Invoice cell** at the right of that row. This will expose the **To Pmts** button just above. This will bring you to the **Payments Form**, with the Invoice box already set to that EFTS Upload Filename.

Library Billing Grid

Search By Status of Request	Search By Invoice No.	🔍 Search	🖼 By Dates	🖨 Print Recs	⇨ To Pmts

20 Record(s) retrieved   **'To Pmts' button**

Use ? As WildCard For Any Single Letter or Number

...is NOT ...rint' to Print ...d File

Billing Grid by Default captures only items with Charges Attached (unless 0.00 checkbox is checked). Press <F2> (or Double-Click) To Edi...
☐ Also Show 0.00 Ite...

...ll Billing Items - By Borrower

...ed	Paid On	Status	Delivery	Rush	Source	Invoice
...2004		Uploaded	Fax	No	DOCLINE	EFTS-BET0405.txt
...2004		Uploaded	E-Mail	No	DOCLINE	EFTS-BET0406.txt
.../2004		Uploaded	Fax	No	DOCLINE	EFTS-BET0405.txt
.../2004		Uploaded	Fax	No	DOCLINE	EFTS-BET0405.txt
.../2004		Uploaded	Fax	*EFTS Upload filename in Invoice cell.*		
...2004		Uploaded	Fax	No	DOCLINE	EFTS-BET0405.txt
.../2004		Uploaded	E-Mail	No	DOCLINE	EFTS-BET0405.txt
.../2004		Uploaded	E-Mail	*Cell turns* light blue *when it has focus.*		

Each method will fill in all the boxes (except **Payment Notes**) with the expected values; the **Payment Date** will either be Today's Date or the date of the payment just finished, so this also may need to be changed. Simply add a note (usually the EFTS Statement Month will do) and click **Add Payment** to complete the transaction. Adding the payment will change the Status of all the individual items in the Upload from **Uploaded** to **Paid**, and will use the **Payment Date specified** on the Payments Form.

A typical EFTS Payment Form will appear as follows:

Payments From Borrowing Libraries (and EFTS)

Typical EFTS Upload File Payment Form. The (Amount This Payment) box will (always equal the upload total). Accept this value always, and make any adjustments using the Service Charge choice.

Invoice Number: EFTS-BET0405.txt ▾   Payment by Request No., Deposit or Credit Acct ☐

Payment Type is EFTS

Previous Payments: $0.00   **Inv Total: $68.00**

Amount This Payment: 68.00   **Payment Method:** EFTS ▾

Paid By (Library, EFTS): EFTSUP   **Payment Date:** Jun 30, 2004 ▾

Payment Notes: 06/2004 EFTS Statement

Enter Check Number or other information describing this payment.

[Add Payment]   [Back]   [Clear Form]   [Delete Payment]

Again, note that you should double-check the **EFTS Payment Amount** (it will be automatically filled in in the **Amount This Payment** box) against the **Total Credits line** on the **EFTS Statement**. In nearly all cases the amount will be the same. But in the unlikely event that it is not, you should nevertheless **always accept the amount displayed**, you can then resolve any discrepancy by entering either a positive (if the EFTS Total Credits line is larger than the upload) or negative (if it's smaller) **EFTS Service Charge** payment later.

4. **Mark EFTS-Paid items as PaidEFTS**. Again using your printouts of the EFTS Monthly Statements, mark as **PaidEFTS** those items that appear under the **Detailed Debit Summary** heading on the EFTS Monthly Report.

If you use the **Record Selector** at the far left of each row, along with the **Ctrl key** to select multiple individual records, or with the **Shift key** to select a contiguous block of records (either of these two step-saving methods is highly recommended, if they're applicable), you can mark all selected records as PaidEFTS with one **Mark Paid** click.

If you use the batch method, be sure to first indicate a **Default Paid Date** so that all items will have the same Paid Date (unless the Paid Date is Today, of course, which is the default---you can always check the date set by hovering the mouse over the **Default Date button**).

If you don't use this batch method, you'll get Today's Date as the Paid Date for all additions and no entry in the Note Field.

[For **non-EFTS Libraries**, it's also a good idea to use a similar method to mark the **Invoice** Items as **PaidLender** once the invoice or individual item has been paid].

In our EFTS Statement for October 2002 there are a number of Debits, including one which is also a Credit to replace a charge made incorrectly in the previous month by another library (**EFTS Credits** always appear as the original request number with a **CR** at the end):

Detailed Debit Summary for MAUBET

Lender Account No	Request Number	Citation	Date Filled	Patron	Charge
MAUMAS	7814654	1998 Aug Cancer biotherapy & radiopharmaceuti	10/17/2002	Susan HEON	$11.00
MAUMAS	7814798	2000 Jun Seminars in cutaneous medicine and s	10/17/2002	IMMU D	$11.00
MAUMAS	7935446	2001 Novartis Foundation symposium. 234 ():255	10/17/2002	7-2375	$11.00
MAUMAS	7935448	1997 Mar American journal of contact dermatit	10/17/2002	7-2375	$11.00
				SubTotal	**$44.00**
MNUMAY	8234093	1997/INT J NURS PRACT TABAK, N/3(2)84-8	10/17/2002		$11.00
MNUMAY	8347458	2002/CURR OPIN INVESTIG DRUGS VARGA, G/3(4)62	10/17/2002		$16.00
				SubTotal	**$27.00**
NHUDAR	8103922	1991 Am naturalist 138():1315-1341	10/17/2002	Infe	$11.00
				SubTotal	**$11.00**
NYU...	7757058CR	1999 Thrombosis haem COPY	10/17/2002		($11.00)
	The line above shows a Credit uploaded for this month's Statement.			**SubTotal**	**($11.00)**
NYUCPS	8034792	J ASTHMA 37(4) 303-18	10/17/2002		$11.00
				SubTotal	**$11.00**

Since the **Date Filled column** of the Detailed Debit Summary section of the EFTS Monthly Report actually reports **Date Uploaded**, you'll probably need to use the dates suggested by Request Numbers to set the Begin and End Dates to use when filling the Borrow Item Backfile Grid.

> **[As of November 2004, the Date Filled column on both the Detailed Credit and Detailed Debit Summary sections of the EFTS Monthly Report reflect not the actual Date Filled but rather the Date Uploaded. If this this were to change to reflect the real Date Filled, this would be a great help in processing these items, since we could set the Begin Dates and End Dates of the grid to approximate the real dates included and thereby reduce the number of items in the Grid to check.]**

Our earliest Request Number on this Report is 7757058. If we search for this Request Number on the **Borrow Item Backfile Grid** using **Containing** (which will search the entire file), we get the following:

Since this request is the earliest on the report, and since it got its number from DOCLINE on the day it was sent, we know that we can use 8/9/2002 as our **Beginning Date** and not miss anything

that would have appeared on this month's report (using the Rec'd Date might miss something that was sent later but received earlier). The largest number on our report under Debit Summary is 8226627; this turns out to have a Received Date of 9/26/2002 (not pictured). Just to be safe, though, we can use the **End Date** to search as the end of the report month, in this case Oct 31, 2002 (for the 10/2002 EFTS Monthly Statement, which is available at the end of that month). Consequently, we'll use the By Dates button to choose:

After choosing the dates, also do the following:

1. Check the **Exclude Not Filled Items** checkbox (we won't be billed for things never received);

2. Depress the **Search By Status of Request** ribbon button and choose **Equals Received** (this will eliminate anything already marked PaidEFTS or PaidLender);

3. Click the header over the **Libr column** and choose **Sort Ascending** (this will put the Lending Libraries in the same order in which they appear on the EFTS Report;

4. Select all the records to be marked PaidEFTS by scrolling down through the list and clicking the **Record Selector** (while holding down **the Ctrl Key** at the same time you click, after the first record selected) at the far left of each row you want to select--- selected rows will turn dark blue;

5. Once all are selected, click the **Set Default Date** button and set the date to the last day of the month of the EFTS Monthly Statement (otherwise you'll get Today's Date as the payment date);

6. Click **Mark Paid** and choose **PaidEFTS**.

If there are items on the report that don't appear in the Grid display (notice that of the two MNUMAY items listed on the EFTS Monthly Report, 8234093 and 8347458, only the first is included among the MNUMAYs in the Grid), make a check mark on the report so that you can check on them individually later. In most cases you'll find that they've already been marked PaidEFTS.

5. **Enter EFTS Service Charges**. Using the Online EFTS Monthly Statement, enter the **EFTS Service Charges** made each month. These will be noted on the EFTS Statement on lines for **Processing Fee** and **Total Other Fee**. Redistributions will also reduce your EFTS Balance, but these are handled separately, below.

Since you'll have a Processing Fee during any month where you do an EFTS Upload, if you charge other libraries then there will probably be one of these to enter each month. Total Other Fee entries are usually **low balance penalties** and shouldn't occur very often. Since we've chosen to standardize entry of EFTS Deposits at the beginning of the month, it makes sense to standardize entry of Processing Fees and Other Fees at the **end of each month**.

EFTS Service Charges are entered as negative numbers on the regular **Payments From Borrowing Libraries Form**. Choose the **Payments** choice on the **Billing, EFTS Menu Bar** dropdown, and then **EFTS Service Charge** from the **Invoice Combo Box**.
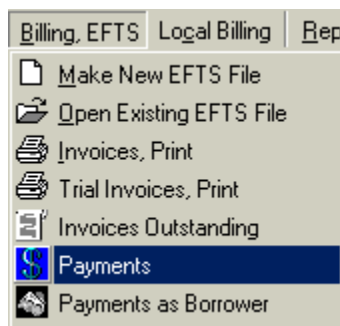
This brings up the **Payments From Borrowing Libraries Form**, which now has the EFTS Service Charge entry in the **Invoice Combo Box**:

Click that choice to get the **Serv Chg Payment Type**. Fill in the rest of the form with values similar to those below (remembering that an EFTS Service Charge is always a negative number on the Payments Form), and click **Add Payment**. Our last Statement (July, 2004) had only $20.00 worth of Uploaded items (on the Total Credits line of the EFTS Statement); our final entry then appeared as follows:

Total Other Fee (EFTS) entries (generally **low balance penalties**) are usually combined with normal EFTS Service charges and entered as a negative total at the end of each month, though they can be entered separately if you wish. Refunds of Other Fees or other positive adjustments can also be entered here, as positive numbers using the EFTS Service Charge designation. You'll see a warning that "**Service Charge entries should be negative numbers!**" but you'll be allowed to proceed and override the warning.

6. **Enter EFTS Redistributions**. Using the Online EFTS Monthly Statement, enter your **EFTS Redistributions** received. EFTS Redistributions are payments of accumulated credits over debits during a specified period (quarterly); only Resource Libraries and other libraries with a

large number of Loans over Borrows receive redistributions. These will be noted on the EFTS Statement on lines for **Total Redistributions**.

Redistributions are entered as negative numbers on the regular **Payments From Borrowing Libraries Form**. Choose the **Payments** choice on the **Billing, EFTS Menu Bar** dropdown, and then **Redistributions (EFTS)** from the **Invoice Combo Box**.

This will assign the **RedistrbType** to this payment. Fill in the rest of the form with values similar to those of the EFTS Service Charge, above (remembering again that an EFTS Redistribution is always entered as a negative number on the Payments Form), and click **Add Payment** to file the transaction.

EFTS Credits to correct Borrower Debit Summary

If you should encounter a charge in the Detailed Debit Summary that you think is incorrect, note the Request Number and Lender, but don't mark that item as PaidEFTS. Mistakes are corrected outside of the system by contacting the Lender directly and negotiating a solution. In most cases this will result in the Lender uploading an **EFTS Credit item** in their next EFTS Upload. Credits are noted with the addition of a **CR** at the end of the Request Number.

NHUDAR	8103922	1991 Am naturalist 138():1315-1341	10/17/2002	D'agata, Erika Infe	$11.00
				SubTotal	$11.00
NYU...	7757058CR	1999 Thrombosis haem COPY	10/17/2002		($11.00)
The line above shows a Credit uploaded for this month's Statement.				SubTotal	($11.00)
NYUCPS	8034792	J ASTHMA 37(4) 303-18	10/17/2002	Shea H J	$11.00
				SubTotal	$11.00

In our case, above, our Debit Summary shows an item **7757058CR**, which is an EFTS Credit that has been uploaded by the Lender. Also notice that in our Grid display, request number **7757058** shows a **Chrg** of **$0.00**. We can infer that an EFTS charge for some amount was included in our Debit Summary for last month and that, after we contacted the Lending Library, that charge was found to be a mistake. We therefore edited that request in QuickDOC and changed the charge to $0.00. We can just skip over the Credit in this month's report, since we never marked it as PaidEFTS in the first place.

If you have already marked that item as PaidEFTS, you can either delete the payment in Payments as Borrower under Billing, EFTS on the Menu Bar, or just add the appropriate amount as a positive EFTS Service Charge amount using the Payments form.

Borrow Function

Borrow Information in the Database

Information on items loaned is held primarily in the **tblBorrowItems** Table in QuickDOC.MDB. Associated bibliographic information for any item is held in the **tblBorrBibs** Table. Local charge information for any item is held in the **tblBorrLocals** Table. Information on Borrow activity is displayed in a Grid format, available by clicking the **Borrow button on the Main Tool Bar** or by clicking Lookup on the Menu Bar and choosing **Items Borrowed**.

Date Format Used in Searching

In order to evaluate dates uniformly, QuickDOC uses a Short Date format based on the Regional Settings of the machine on which it is being run (e.g., 23-Sep-2001 will display as 09/23/2001 in English – U.S. format; as 23/09/2001 in English – Canada format, etc.). Dates displayed in most cases will use this format.

(Because of an idiosyncrasy of SQL Queries on Access-type databases, all SQL Search Dates are re-formatted to English – U.S. for search purposes only, but this will have no effect on the local format used or on the format displayed in QuickDOC. It will be transparent to the user.)

Dates displayed in **Calendar Date Boxes** for data entry will use the Month Day, Year format (e.g., Sep 23, 2001) so as to skirt the date format issue entirely. These controls have some degree of built-in intelligence, so that when you begin typing the month name it will often complete all three letters if there is only one possibility---as in Sep, above). You can check the local settings for your machine in the Control Panel, under **Regional Settings**.

Borrow Grids

Lists of items requested are normally displayed in Grid format, showing either current requests outstanding or those requests that have been sent and received (the Backfile), according to whatever limits are set. Searches can be limited by Date and by choices on the ribbon bars. The **Requests Outstanding Grid** will be the first grid shown after you click Borrow, but you can toggle back and forth between Requests Outstanding and the **Borrow Item Backfile Grid** by clicking the ribbon button with the white background just above the Search Box. In the Requests Outstanding Grid, the toggle always reads **Go To ALL Borrow Items**, i.e., the reverse of where you are.
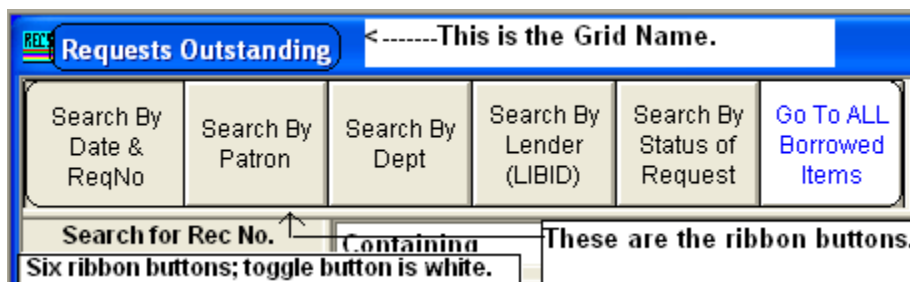
The Borrow Item Backfile grid shows **Go To Outstanding Only** as the toggle.
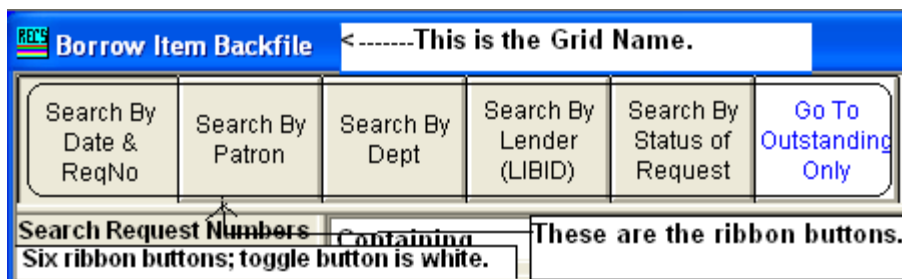
In addition, multiple deletes and global column changes can be accomplished on any of the Grid views. **Search Dates** selected are displayed (in local date format) in the box just above the Grid to the right, as well as in a Tool Tip when the mouse is held over the **By Dates button**.

Request Number Searching in Borrow

In all **Request Number searches**, whether made on the Requests Outstanding Grid or the Borrow Item Backfile Grid, if a part of the request number is entered in the Text Search Box (the box next to "Containing" below), then **ALL records that match that Request Number pattern and Search criterion (Containing, Equals, etc.) are retrieved**, no matter what the date of the request might be.
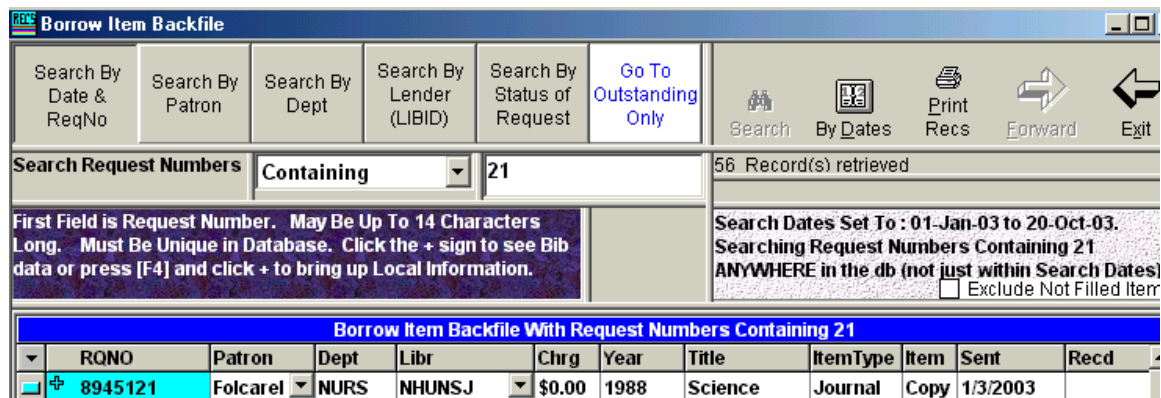
If the Text **Search Box is left blank**, then **ALL Outstanding Items** will appear in the Requests Outstanding Grid, and **ALL Items** (within the selected Date Range) will appear in the Backfile Grid. This broad-based response is unique to Request Number searching; all other searches are limited by the criteria of the Grid used and by the range of Dates Selected.

An exception to the 'All Dates' rule for Request Number is made for searches where there is something entered in the Search Box and the **Search Criterion** is **Beginning With**; **Beginning With Request Number Searches** will adhere to the **Dates currently set for searches**.

This is intended to permit the searching of various non-DOCLINE items, entered manually with all request numbers beginning with a certain phrase or letter, within the Dates specified. (E.g., if you enter all WEST CAMPUS items with a number beginning with WEST, they will be retrieved in a Date Search properly with a search strategy of 'Beginning With' WEST.)

Another common use of the Beginning With search is for Copy Service activity (where the prefix is COPY). For **Copy Service**, just set the dates and type COPY as the **Beginning With value**:

	RQNO	Patron	Dept	Libr	Chrg	Year	Title	ItemType	Item	Sent	Recd
	COPY0307071	Daly	MED	MAUBET	$0.00	2003	J biological c	Journal	Copy	7/7/2003	7/7/20
	COPY0308061	Berrada	GAST	MAUBET	$0.00	1996	Eur J medicir	Journal	Copy	8/6/2003	8/6/20

All your Copy Service items will be displayed, sorted by Date Received. You can then re-sort the list by any column (e.g., Patron, to order the list by Patron) to see subsets of Copy Service activity.

Requests Outstanding Grid

All items that have not yet been acted upon will appear in the Outstanding Items Grid.

	RQNO	Patron	Dept	Libr	Chrg	Year	Title	ItemT	Item	Sent	Rec	Status	DelM	Rus	M
	12786	Gomez-Sa	(None)	VAUVIR	$0.00	1997	Biochemistry	Journ	Copy	7/17/2000		Outsta	Mail	No	$
	12788	Jones	LIBR	VAUTMC	$0.00	1997	Biochemistry	Journ	Copy	7/17/2000		Outsta	Mail	No	$
	12789	Jones, Joe	(None)	VAUVIR	$0.00	1998	Biochemistry	Journ	Copy	7/17/2000		Outsta	Mail	No	$
	12790	Gomez-Sa	(None)	VAUVIR	$0.00	1999	Biochemistry	Journ	Copy	7/17/2000		Outsta	Mail	No	$

The Requests Outstanding Grid will be **the first Borrow Grid to appear during each session**. This is to give a brief look at the number of items still not received. As items do arrive at the library (or are sent directly to the Patron), their records should be checked in here. For the most part, except for Cancels and Loansome Doc requests filled by yourself, there is no automatic check-in possible, since only the local library can know exactly when something arrives.

Rush and Urgent Patient Care DOCLINE Requests

DOCLINE 2.7 introduced 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** were 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 looks for these words as well when importing data (screen shots below are from NLM 2.7 examples).

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.

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.

Requests Outstanding Note Field

Note Icon

The Requests Outstanding Grid contains a **Note field** in the far right column of the Grid (as does the Borrow Item Backfile Grid, but the Note Icon will only appear on Requests Outstanding). In most cases, the Note field is scrolled off at the right of the screen and isn't therefore visible unless the grid is scrolled to the right. And when the grid is scrolled to the right, the important fields to the left are out of sight:

		Ch	Year	Title	ItemType	ItemF	Sent	Rec	Status	DelM	Rus	MaxC	SRCE	Note
	✛	$0.	1988	Science	Journal	Copy	1/3/2003		Outsta	Mail	No	$11.0	DOCLINE	
	✛	$9.	2002	Curr pharmaceu	Journal	Copy	2/12/2003		Outsta	Mail	No	$11.0	DOCLINE	Make sure this gets
▣	✛	$9.	2002	Curr treatment o	Journal	Copy	2/14/2003		Outsta	Ariel	No	$15.0	DOCLINE	No charge to Patron
	✛	$9.	2002	Curr treatment o	Journal	Copy	2/14/2003		Outsta	Ariel	No	$15.0	DOCLINE	

In some libraries it is common to put notes in this field regarding disposition of the item when it's checked in, and other pertinent information about the request (there's only 50 spaces available for the note, so it can only be a brief message). Because the Note field isn't normally visible, and requires a scroll to the right even to see whether or not a note is present, it is easy to miss this information.

QuickDOC provides a visual clue to the presence of something in the Note field, the **Note Icon**:

Any row that has an entry in the Note field (except for the default Loansome Doc entry of "Refer on…") will display the Note Icon to the right of the Request Number. When the Note Icon is present, you can also check the contents of the Note field without scrolling by moving the mouse cursor over the Note Icon for that row. The **contents of the Note field will then appear as a Tool Tip** (as shown above).

It may be necessary to **make the RQNO Column wider**, to allow space for the Note Icon without obscuring the latter part of the Request Number. Do so by moving the mouse cursor up to the vertical line between RQNO and Patron (the cursor will change to a cross shape)…
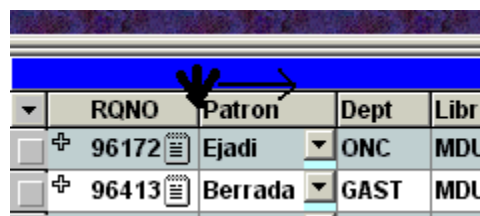
…and dragging the vertical border to the right...

Once this change is made, it should continue thereafter each time you start up QuickDOC (it will be observed in both the Requests Outstanding and Borrow Item Backfile Grids, but not on the Lend side).

Adding Notes in Requests Outstanding

The quickest method for adding a note to an item in the Requests Outstanding Grid is as follows:

1. Click once into the **Request Number cell** of the item where the note is to be added;

2. Press the **End** key to pop over to the Note field;

3. Start typing the note;

4. Press **Enter** when finished, to post the note and return to the leftmost column of the Grid.

Clearing Notes in Requests Outstanding

The quickest method for clearing a note field in the Requests Outstanding Grid is as follows:

1. Click once into the **Request Number cell** of the item where the note is to be cleared;

2. Press the **End** key to pop over to the Note field;

3. Press **<F5> to clear the field**;

4. Press **Enter** when finished, to clear the note and return to the leftmost column of the Grid.

Pressing **<F5> in the Note field** is equivalent to pressing **<F2> to begin a field edit**, **<Home> to move to the beginning of the field**, and **<Ctrl><Delete> to clear the contents of a field**.

Patrons reaching Maximum Free Items per Year

There is a column in the **Local Charge Profile** that provides for assigning a number of **Free Items per year** to Patrons who have been assigned that Charge Profile. As a method of notifying the Library Staff when a Patron has reached, or is about to reach, that **maximum number of Free Items**, QuickDOC will make a check during every QDPortal Import for each Patron to see:

1. Does the Charge Profile assigned to this Patron include a Free Items entry greater than 0; and

2. If so, is the number of items already received for this Patron during this (fiscal or calendar) year **greater than the Maximum Number of Free Items minus 3**?

If both of these criteria are met, QuickDOC will put a note in the BorrowNote field during import. The format of the note will be "**Patron has X Free items (Max allowed = Y)**," where **X** is the number already received and **Y** is the total Free Items listed in the Charge Profile. Holding the mouse cursor over the Note Icon will display the note:

Note Icons, and the formatted note, will continue to appear, with incrementing numbers for X, though not for Y, until the end of the year, when the numbers are reset. It is the first few appearances of the Note Icon, however, which are meant to alert Library Staff that invoices are about to be needed for the Patron involved. You can leave the generated notes alone (as an easy reminder of how much you've done for this Patron) or you can also blank out the Note field, which will also suppress the Note Icon on future Requests Outstanding displays for that row.

Lending Library Charges – How and when are they computed?

Unlike the Local Charges, which are calculated only when the item is received, the Library charge is calculated, based on the **Library Charge Profile** of the Library to which it is first sent, on first import into Requests Outstanding. It isn't automatically re-calculated thereafter unless either the **Delivery Method**, **Rush** value, or Library **LIBID** is changed. If you change a Library's Charge Profile, the new designation will take effect only on new requests; existing charges will be unchanged.

But even existing item charges will be determined by the new profile if any of the signal values (Delivery, Rush, LIBID) are changed, causing a re-calculation using the new Charge Profile. You can test this by changing a Library's Charge Profile, then changing the Delivery Method on one of that Library's items, saving changes and then changing the Delivery Method back to its original value. The new charge profile will determine the new value. And it's always possible to change the Charge value directly, by double-clicking into the **Chrg** field and entering a new amount; this new change will stick unless, of course, a later change in Library, Delivery or Rush causes a later re-calculation.

Use the F4 Key to go directly to Local Information

Clicking the + sign at the left of any row will bring up the underlying **Bibliographic** and **Local Item Information**. Bibliographic Information is the initial default, but if you click that + sign two or three times, eventually you will uncover the **Local Information Grid**.

In order to make this process a bit more accessible, if you press the **F4 Key** before clicking the **+** sign, the default will be for Local Information rather than Bibliographic. This option only occurs if the focus is in the **RQNO cell**. While this will be true in both the Requests Outstanding Grid and the Borrow Item Backfile Grid, it might be most useful in Requests Outstanding to indicate a **change in the Local Delivery Method** before the item is marked **Received**. In the case below, the F4 key was pressed before the + sign (now a – sign) was clicked:

If you **change the Local Delivery Method**, this is a key for QuickDOC to **re-calculate the Local Patron and Dept Charges** (other keys are changes to **Rush** or to the **Lending Library**), so you may see changes there as well:

In the case above, since the Status is still Outstanding, the charges will be re-calculated again when the item is **checked in** (**marked Received**). If there is no other change in Rush or Library or Delivery Method, though, the charges re-calculated will be the same as those above.

After an item has been invoiced or paid, however, all changes to **ChrgAsPatron** and **ChrgAsDept** will be ignored, as a practical matter, since the **final Local Charge is assigned at the time the Local Status is changed to Invoiced or Paid** (Patron or Department). In order to re-calculate, you must first change the **Local Status** back to **Open** (which usually means deleting an Invoice or Payment assigned to it) and then re-do the payment or invoice.

Copyright Check in Requests Outstanding Grid

For libraries located in the U.S. the Requests Outstanding Grid will highlight in red items where the Journal has already been borrowed **5 or more times during the current year**. This count **will exclude items where the year of publication is earlier than 5 years before the current year**, but it won't consult the CCL or CCG status, so it should be considered a 'heads up' rather than a final report.

This information can be used to cancel and re-direct an item to a lender that includes Copyright payment in the fee, or to add an extra royalty charge to the Patron Charge after the item is checked in.

For **libraries located outside the U.S.** the Requests Outstanding Grid will highlight in red items where the Journal has already been borrowed **10 or more times during the current year**, no matter what the year of publication.

Journal Times Borrowed Count in Requests Outstanding Grid

The number of times borrowed is always available in the Requests Outstanding Grid by selecting **Show All Grid Cols** from the context menu that appears when you left-click the header of any column. Scroll to the far right to view the column (the header will be the current year + "Borr").

All Requests Outstanding - By Request Number												
ItemType	**ItemF**	**Sent**	**Rec**	**Paid On**	**Status**	**DelM**	**Rus**	**MaxC**	**LocalS**	**SRCE**	**Note**	**2002Borr**
Journal	Copy	4/10/2002			Outsta	Mail	No	$12.0	Open	DOCLINE		5
Journal	Copy	4/10/2002			Outsta	Mail	No	$12.0	Open	DOCLINE		1
Journal	Copy	4/10/2002			Outsta	Mail	No	$12.0	Open	DOCLINE		5
Journal	Copy	4/10/2002			Outsta	Mail	No	$12.0	Open	DOCLINE		0
Journal	Copy	4/10/2002			Outsta	Mail	No	$12.0	Open	DOCLINE		1
Journal	Copy	4/11/2002			Outsta	Mail	No	$12.0	Open	DOCLINE		5
Journal	Copy	4/11/2002			Outsta	Mail	No	$12.0	Open	DOCLINE		0
Monogra	Origina	4/11/2002			Outsta	Mail	No	$8.00	Open	OCLC		0

If you click on the header of that column you can Sort Descending to put the most borrowed titles at the top. Again, these numbers reflect **CONTU Guidelines** values in the U.S. (only publication dates within the previous five years) and all dates outside the U.S.

For complete Copyright information, use the Copyright Report (All Items) to check/edit CCL and CCG values; then use the Copyright Report (U.S. – CCC) to file with the Copyright Clearance Center.

Journal Title editing in Borrow Grids

When importing DOCLINE Borrow requests into the database, QuickDOC uses the **ISSN**, in most cases, to do a lookup of the Journal Title in the **tblJournals** Table. It then notes the **JrnlID** number and uses that from that point on to track journal use.

If an incorrect ISSN has been assigned to a Journal record, you may notice that an incorrect journal title shows up as a result. To correct that record, first check SERHOLD on DOCLINE to get the correct ISSN for the journal title displayed. Then click into the Title cell with that incorrect journal title. A **To Jrnls** button appears above. Click that button to get to the **Add/Edit Journals Form**.

This brings you to the Add/Edit Journals Form, where you can edit the *Perspectives psychiatriques* record to show the correct ISSN.

This will file the change and bring you back to the Borrow grid, but the incorrect title (albeit with its now-correct ISSN) will still show as the current title in the Grid. The final step to retrieve the correct title is as follows:

1. Click the To Jrnls button again to return to the Add/Edit Journals form.

2. Click the Clear Form button to prepare for a search by ISSN, Title or NLMUI.

3. Enter the beginning of the correct journal title (using abbreviations as necessary).

4. Click Search.

5. Double-click the correct entry from the list displayed. This will bring the values from that journal record over to the edit boxes on the left side of the form.

6.   Click Back to bring that journal's values back to the Grid.

This method insures that not just the title but also the correct JrnlID are associated with the record.

Quick Journal Times Borrowed Report

While the Requests Outstanding Grid will highlight items borrowed 5 or more times, it doesn't show detail on the number of times the title was borrowed. To have a quick look at all Borrow transactions for any title, just click into the Title cell in either the Requests Outstanding or Borrow Items Backfile Grid, which will expose a **Quick Jrnl Rpt button**. Click this button (or press **<Alt><Q>** on the keyboard) to see a list of all times the Journal Title was borrowed since the beginning of the year.

The Print Preview screen will display the list (the dates Jan 1 to Date are built into this report):

This is basically a short version of the Journals Borrowed (Full) Report. If you want a printout, click the **Print Page menu choice**. The printout is basically a screen shot of the top half of the report.

Print Page will give you a screen shot, for the most part, of the top half of the full screen. Use the full reports for true page-length printouts.

Quick Reports for Journals are always based on the current year.

Report for [Curr topics in medicinal chemistry.] in 2003, sorted by Pub Year (Descending).
01-Jan-03 to 27-Jan-03

Quick Reports are for 1 Journal, etc.

27-Jan-2003		Beth Israel Deaconess Medical Center (01-Jan-03 to 27-Jan-03)				Page 1
Journal#	# Borrowed	Lender	Year	Jrnl Title		Patron
1	1	MDUNLM	2002	Curr topics in medicinal chemistry.	Jun;2(6):507-28	Sukhatme, Vikas

TOTAL ALL ITEMS: 1

Because of the way this is set up, it will only print as much of the report as shows on top of the horizontal scroll bar at the bottom, but this should be sufficient for most shorter lists.

Monograph Quick Report for Borrows

To display a list of Monographs Borrowed since the beginning of the year, click into the Title cell of any Monograph and click the **Quick Jrnl Rpt button**. **Monographs borrowed** will be displayed as follows:

Report of Monographs Borrowed in 2006, sorted by Title.
01-Jan-06 to 24-Oct-06

24-Oct-2006		Beth Israel Deaconess Medical Center (01-Jan-06 to 24-Oct-06)			Page 1
Journal#	# Borrowed	Lender	Year	Jrnl Title	Patron
1	1	NEONBU	2000	ADAPTIVE TECHNOLOGY FOR THE INTERNET	Magee, Marty
	2	NEUAPS	1992	ADMINISTRATION OF THE SMALL PUBLIC LIBRA	Magee, Marty
	3	MDUNLM	1981	ANAESTHESIOLOGY: PROCEEDINGS OF THE 7TH	Marshall, Kenneth
	4	NEUAPS	2005	DATA MINING IN BIOINFORMATICS /	Sun, Junfeng
	5	NYUAEB	2005	DRUG DELIVERY TO THE ORAL CAVITY	Wang, Dong
	6	NCONGU	1999	EXAMINATION OF SOCIAL SUPPORT AS A FACIL	Jackson-Konnath, Hop
	7	NEUAPS	1971	FEEDING THE HANDICAPPED CHILD	Murphy, Kristi
	8	NEONBU	1985	GENERATION TO GENERATION	(None)
	9	NEONBU	1999	HANDBOOK OF COGNITION AND EMOTION /	Geske, Jenenne
	10	COURGS	2006	HEALTH CARE FINANCIAL MANAGEMENT FOR NUR	Straub, Dawn
	11	MAUHMS	1994	HUMAN ERROR IN MEDICINE	Moorman, Donald
	12	NEUCRU	2005	IMMUNOBIOLOGY	Sreejith-janardhanan
	13	MAUBNU	1993	INDIVIDUAL AND GROUP DECISION MAKING: CU	Moorman, Donald
	14	NEONBU	1992	INFORMATION LITERACY	Magee, Marty
	15	NEONBU	1989	INFORMATION LITERACY	Magee, Marty
	16	NEUUNK	2001	INTRODUCTION TO ALGORITHMS /	Sun, Junfeng
	17	NEOGR4	2002	INTRODUCTION TO HUMAN NUTRITION /	Grandjean, Ann
	18	NEONRJ	2002	LIBRARIES IN THE INFORMATION AGE	Magee, Marty
	19	NEUAPS	1978	LIBRARY ASSISTANT'S MANUAL /	Magee, Marty
	20	NEUMCW	1975	LIBRARY TECHNICAL ASSISTANT'S HANDBOOK /	Magee, Marty
	21	NEUAPS	2005	MAGNETIC RESONANCE IN FOOD SCIENCE	Keifer, Paul
	22	NEUAPS	2005	MAGNETIC RESONANCE IN FOOD SCIENCE	Keifer, Paul
	23	UTUBYL	2006	MANAGEMENT AND LEADERSHIP FOR NURSE ADMI	Straub, Dawn
	24	MDUNLM	1983	METHODS OF ENZYMATIC ANALYSIS, 3RD ED, 1	Hansjon, Judi
	25	MDUNLM	1983	Methods of Enzymatic Analysis, 3rd ed.,	Hansjon, Judi
	26	NEOBLL	2006	NO SWEAT EXERCISE PLAN	Grandjean, Ann

The list is sorted alphabetically by Monograph Title, with no citation (most of these citations will be "Monograph" anyway) but with the Patron listed along with the Lending Library.

Printing a Detailed Borrow Report for One Lender

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 **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 - 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.

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:

Click the **Print Lender 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 Borrowed Items.

Checking In Requests Outstanding

There are a number of ways to check in an Outstanding item that has been received:

1. Change Status to Received. An item can be checked in, once it's arrived, by simply changing its Status to **Received** from **Outstanding** in the **Status column**. If you enter nothing in the Rec'd date column (just to the left of Status), Today's Date will be applied (you can always enter the date information also, of course). Then, either click on another row of the Grid or click **Save Changes** to register the change.

2. Enter a Received Date. Entering a Received Date in the **Rec'd column** will automatically change the Status to Received. Then, either click on another row of the Grid or click **Save Changes** to register the change.

3. Use the Record Selector button. You can also **batch check-in** ALL of Today's Check-ins by first selecting each one (use the Record Selector button at the left edge of each row; Record Selectors are described below). Holding down the Ctrl Key while clicking each Record Selector allows the choosing of multiple rows. Holding down the Shift Key while clicking the Record Selectors of two records will choose those two plus any records in between. See 'Selecting Grid Records' below for illustrations.

Once you've selected the records to check in, you can change the Date to be applied as the Rec'd Date to all of them by clicking the Default Date button (all these buttons will appear when the first record is selected), but in most cases the initial default, Today's Date, will be appropriate. At that point click the new **Mark Rec'd button** to check in all selected items. Only items still marked as Outstanding or **Queue** (which is the status of any **Loansome Doc** request when it's first received) will be affected.

While this method is most useful as a batch check in, it can also be used regularly to check in individual items. The procedure is as follows:

1. Click the Record Selector next to the item you want to check in;

2. Change the Default Date if necessary;

3. Click the Mark Rec'd Button to record the change;

4. Repeat for any other individual check-in.

4. Use a bar code reader. Ron Schultz posted this to QuickDOC-L of his experience using his **bar code reader** to check in items as they arrived:

This is what I have found using the new borrowers section of q-doc. I use bar-codes. I also save in a file a copy of the request to include the bar-code for the record number. I scan the bar-code and the record comes up in the "outstanding" section.

I first check to make sure it is from the original library, if not then the change is made.

Second, I change the outstanding to received. Today's date will also be filled in. I then update.

After a few days of working with the system, it can all be done in about 5 seconds now. I am then off to the next record. The bar-code reader speeds this up nicely.

The Patron and Libr columns include dropdown boxes with lists of ALL Patrons in your Patrons Table (**tblPatrons**) and ALL Libraries in your Libs Table (**tblLibs**). These lists are opened by clicking the down button (for some reason it takes three clicks the first time to drop the list down, but only one thereafter) at the right edge of each column. Fields with data that may be wider than the width of the column they reside in will show the complete field information as a Tool Tip when you move the Mouse Pointer over that cell (as in "Jones, Joe" above).

In the case shown above, the Requests Outstanding Grid shows a typical screen after an initial import in a library that has been saving requests in QDPortal but has just begun using QuickDOC. In most normal use, you will not have 2,756 Outstanding Requests! (If you do, hire help at once.) In normal use, after doing the import from QDPortal for that particular day, come here to the Requests Outstanding Grid and check to be sure that all requests sent have been properly imported into the database. You can reverse the normal sorting by clicking the header of the "Sent" column to get the **Column Context Menu**.
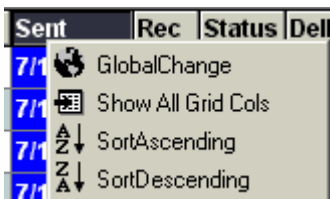
and choosing "Sort Descending." This will put today's items right at the top for easy checking.

You can toggle back and forth between these two Grids using the Ribbon Button with the white background and blue letters. In the above Grid, clicking the "**Go to ALL Borrow Items**" button will switch to the Borrow Item Backfile Grid.

Batch Check-in of Borrows

If you suddenly discover that you have a number of Borrow Requests that remain in the Requests Outstanding Grid, when they should have been processed sometime long ago, you can do a batch check-in that will keep the records in the general time period when they were truly received.

Use the following three steps to batch import these items:

Process Unsuccessful Items

Click the "Borrow" button to get a list of all **Outstanding Borrow Items** (Cancels and Loansome Doc Not Filleds will have already been processed). The first step in batch processing is to cull out those newly imported items that were **NEVER** received. These we can mark as **Not Filled** in the Grid.

Use your saved paperwork to process, one by one, those items that were unsuccessful. Outstanding Requests are generally displayed without reference to Start Date and End Date (since, generally, they will always be fairly recent), but you can use search for Request Numbers to bring up the item you want, or just scroll to the appropriate row.

You can also sort by any column in this list to make it easier to find these items. Just click the header above the column you want to sort and choose "Sort Ascending" or "Sort Descending."

Process Received Items with new Lenders

After all the Unsuccessful Items have been processed, the next batch will be those that were received, but filled by a Library other than the one to which it was first sent (NLM has estimated that about 90% of items sent on DOCLINE are filled on the first route, so this part should be about 10% of your outgoing items, more or less). These need to be processed in the same way the Unsuccessful Items were published, above: one by one.

Change the Lender by clicking on the down arrow in the **Libr** cell and choosing the new Library. Moving to another row or clicking the **Save Changes** button will register the change. You don't

need to mark the item as **Received** (although you can if you want to, adding the proper Received Date), since you can batch process the item in the next step.

Process All Other Borrow Items By Month

Everything else on the list should now be a Received Item, with only the **Date Received** to be determined. For the purpose of batch processing, you can choose a **common date** and then batch process any number of items to Received, with that **common Received Date**.

The easiest choice might be to process them **month-by-month**. If you click the header on the **Sent column** and choose **Sort Ascending** you'll get the list in order by Date Sent. To select all the July 2000 items, for example, first click the **Record Selector** (the button in the leftmost column) next to the first row in July. Then scroll down and, **while holding down the Shift Key**, click the Record Selector next to the last row in that month (or choose a date before the end of the month when a common Received Date will best work). This will select all the items in that month for processing.

Next choose the **Default Process Date** by clicking the **Set Default Date** button. Use the Date Box or the Calendar to choose the **Default Process Date**.

The current Default Date, by the way, is always available as a **Tool Tip** if you place the cursor over the button, as above. Once the Date is satisfactory, click the **Mark Rec'd** button to effect the change.

Repeat as necessary for the next month, until we're up to date.

Borrow Backfile Grid

All items that have been completed, whether received or just unsuccessful, will appear in the Borrow Backfile Grid. Initially, the **Date Range for searches** will depend upon whether you're using a **Fiscal Year** or **Calendar Year** Start Date.

1. If the Start Date is equal to Jan 1st (Calendar Year) then the **Grid's default begin date** is either:

    a. **If today's date is before June 30th**: the display would begin at the <u>first day of the month 180 days ago</u>, e.g., on June 23rd the grid would start the display with December 1st of the previous year or,

    b. **If today's date is July 1st or later**: the display would begin at the <u>beginning of the current year</u>, January 1.

2. If the the Start Date is later than January (Fiscal Year), then the **Grid's default begin date** is either:

    a. **If today's date is later than the Fiscal Year Start Date**: the display will begin at the <u>beginning of the current year</u>, January 1 (e.g., if the FY Start Date is Oct 1, and today's date is November 23rd, the display would begin at 1 January of the current year).or,

    b. **If today's date is earlier in the year than the Fiscal Year Start Date**: the display will begin at the <u>Fiscal Year Start Date in the last calendar year</u> (e.g., if the FY Start Date is Oct 1, and today's date is June 23rd, the display would begin at 1 October of the previous year).

Current search dates are often shown in the gray box just over the top right of the Grid. Current search dates are also available as a Tool Tip when you let the Mouse Pointer hover over the **By Dates Button** for a second or two:

Excluding Not Filled Items from Items Retrieved

In the Borrow Item Backfile Grid, **Not Filled Items** are usually **included** in the records retrieved, except when a **Search By Status of Request** search specifically indicates that a certain status only is expected (e.g., a search for **Status Equals Received** will not, by definition, include Not Filled Items).

You can specifically exclude Not Filled Items from the records retrieved by checking the **Exclude Not Filled Items checkbox**.

| 673 Record(s) retrieved |
| Use ? As WildCard For Any Single Letter or Number |
| Search Dates Set To : 01-Jan-02 to 29-Sep-02. Searching ReqNo - Ordered By Date and Containing Values Entered. ☑ Exclude Not Filled Items |

st Number

	ItemType	Item	Sent	Recd	Statu	DelM ▲
ə	Journal	Copy	2/13/2002	2/28/20	Recei	Mail
c	Journal	Copy	2/20/2002	2/28/20	Recei	Mail
c	Journal	Copy	2/25/2002	2/28/20	Recei	Mail
la	Journal	Copy	2/26/2002	2/28/20	Recei	E-Mai
a	Journal	Copy	2/26/2002	2/28/20	Recei	Mail

The same search, run with the checkbox unchecked, will include Not Filled requests along with others retrieved using the criteria specified.

| 729 Record(s) retrieved |
| Use ? As WildCard For Any Single Letter or Number |
| Search Dates Set To : 01-Jan-02 to 29-Sep-02. Searching ReqNo - Ordered By Date and Containing Values Entered. ☐ Exclude Not Filled Items |

st Number

	ItemType	Item	Sent	Recd	Statu	DelM ▲
ə	Journal	Copy	2/13/2002	2/28/20	Recei	Mail
n	Journal	Copy	2/14/2002	2/28/20	Not Fil	Fax
ri	Journal	Copy	2/14/2002	2/28/20	Not Fil	Fax
c	Journal	Copy	2/20/2002	2/28/20	Recei	Mail
c	Journal	Copy	2/25/2002	2/28/20	Recei	Mail

Since the Requests Outstanding Grid, by definition, won't include items with a Status of Not Filled, the Exclude Not Filled Items checkbox only appears in the Borrow Item Backfile Grid.

As with all Grids, the Ribbon Buttons just above the Search Text Box are used to stipulate a common search type: Request Number, Patron, Dept, Library and Status.

The total number of **records retrieved by a search** is displayed in the space just beneath the By Dates Button.

The **Name of the Grid being used** is always at the top left of the form (Borrow Item Backfile, above). A **Description of the Grid's Search Results** appears in the middle of the blue Grid Header ("All Borrow Item Backfile – By Request Number" in the case, above). Clicking any of the column headers exposes a **column context menu** for that column, with choices for Show All Grid Columns, Global Change, and Sorting A-Z or Z-A (see above).

Selecting Grid records

You can select and delete a batch of Grid records by using the **Record Selector button** at the left of each row to select the row (or rows). Selected rows are highlighted in blue, as shown in the illustration below:

In the view above, **highlight rows you want to process by clicking their Record Selectors** (the buttons on the left column). To **select more than one record**, hold down the Ctrl key while clicking, or press the shift key to **select a range of records** from the first record selected to the end of the group you want to delete. To select ALL Records in the Current Grid, you can simply click the topmost button over the Record Selector column (it has a small, inverted pyramid as an icon), and you will notice that all rows in the Grid turn blue.

Setting the Default Date for Batch Processing

Unless you want the **Default Process Date** to be Today's Date (the default), select the Date you want applied to all items in the batch by clicking the 'Set Default Date' button. Use the Date Box or the Calendar to choose the Default Process Date. This is the date that will be applied to all items selected when each is Marked Filled or Marked Paid, appropriate.

Once you've selected the Default Process Date, make sure it's registered by either pressing Enter (if you've been entering it by typing in the date box) or by clicking the "Set Default Date" button again. The current Default Date is always available as a Tool Tip if you place the mouse pointer over the button, as above. Once the Date is satisfactory, click the 'Mark Rec'd' or 'Mark Paid' button, and all records selected will be processed, one-by-one so that any database relationships can also be updated.

Marking Rec'd Borrow Grid records

This is the common process of checking in items as they are received. In addition to changing the Status column directly (discussed above), you can use Record Selectors to batch this process as well. Use the Record Selectors to select all the items you want to Mark Rec'd (check in).

Once you've selected the records, you can change the Date to be applied as the Rec'd Date to all of them by clicking the Default Date button, but in most cases the initial default, Today's Date, will be appropriate. Once the records to be checked in are selected, and the date of check-in is correct, click the **Mark Rec'd button** to check in all selected items. Only items still marked as Outstanding or **Queue** (which is the status of any **Loansome Doc** request when it's first received) will be affected.

While this method is most useful as a batch check in, it can also be used regularly to check in individual items. The steps are as follows:

1. Click the Record Selector next to the item you want to check in;
2. Change the Default Date if necessary;
3. Click the Mark Rec'd Button to record the change;
4. Repeat for any other individual check-in.

Marking Paid Borrow Grid records

This is the method used for recording **Payments to a Lending Library**. The most obvious use is for batch processing a payment of a **Lending Library** , an **EFTS Monthly Statement** or **IFM Statement** of activity. Use the Borrow Item Backfile Grid and set the Start and End Dates to a period a week or two wider than the dates represented on the Invoice or Statement (because the Invoice will reflect the Lending Library's Fill Date, while our date of activity is the Received Date). For an Invoice, you can further restrict the display to the Lending Library. For an EFTS or IFM Statement, restrict the display by clicking the **Search By Status of Request** ribbon button and choosing **Equals Received** to eliminate the Not Filled items, etc. The list will then be arranged by Date Received and will contain only items that haven't yet been paid. Working from the Invoice or Statement, you can select each item listed thereon by holding down the Ctrl Key and clicking the appropriate Record Selector.

Once you've selected the records to mark to paid, with the proper date of payment set in Default Update Date (which, for an Invoice, might be the date a Check Request was created and sent to Accounts Payable), you can mark all selected records to Paid by clicking the **Mark Paid Button**.

If your own Library record indicates that you participate in the EFTS or IFM systems, you will be asked whether this payment is an EFTS or IFM payment:
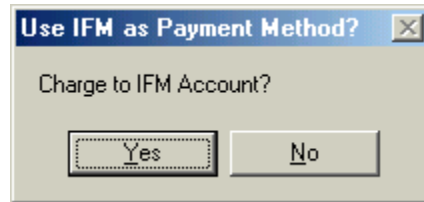
Whether or not this is an EFTS or IFM payment, you will next see a box entitled **Check Number or Other Note** for recording Payment Information.
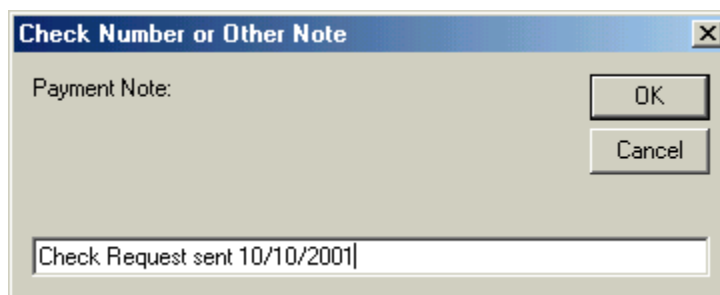
Use this to file away pertinent payment notes, etc. When you click 'OK' above, the records will be changed to **PaidLender** in the Status column (**PaidEFTS** for EFTS Payments, and **PaidIFM** for IFM Payments) and the payment will be recorded in the Borrow Payments Table (tblBorrowPayments) by Request Number and with the appropriate note. **Borrow Payment Type** is either EFTS, IFM or Other for all Borrow Payments at this juncture.

Steps for recording payments to Lending Libraries are as follows:

1. Click the Record Selector next to the item you want to mark Paid;

2. Repeat as necessary (with Ctrl key pressed) for all items in the Invoice, IFM or EFTS Statement,

3. Change the Default Date if necessary;

4. Click the Mark Paid Button to begin the update;

5. Enter any Check or Payment info in the Payment Note box

6. Repeat for other invoices.

While batch processing is the most obvious use of this method, it can be used as an alternative to individual editing of the Status column as well. In fact, using the Record Selector method, even for an individual paid request, provides more information on the payment than just changing the Status to Paid.

 Only items marked as Received can be changed to Paid. If you have an item marked Outstanding or Queue or Paid, you must first check it in as Received before proceeding.

Deleting Borrow Grid records

Once you've selected records to delete, you can delete that batch with the **Delete Records button**. Records marked **'PaidLender', 'PaidIFM'** or **'PaidEFTS'** will not be deleted in this batch

process. They must first be marked back to '**Received**' so that any related Invoice or Payment table information can be properly updated as well.

Global Updates of Borrow Grid Columns

Perform **Global updates** by first editing the topmost record of a column where you want all the records to have the same value. Once the top record has the correct value, perform the Global change by left-clicking the button at the top of the column, such as "**Chrg**" above.

The column will be highlighted and a message box will give you a chance to back out, if necessary.

If you click OK, all the values will change to $11.00, except for columns where processing has moved to a state where a change in charge isn't appropriate, such as Status of PaidLender, or Not Filled. Similar restrictions apply to most Global Column Changes.

Most of the columns have Dropdown boxes, or Calendar controls, for choosing options. The Delivery Method column can be changed by clicking on the Down Arrow and choosing from the list:

If you start typing the beginning letters of the value (as in picKup, above), the selection should be found as a matter of course. You can also **open a dropdown box on any Grid** either by clicking the down arrow or by pressing **<Alt><Down Arrow>** in the field.

Save Changes Button

In any case where changes are made to values on any Grid, the changes are written to the database whenever the focus is moved from the row that is being edited to another row on the Grid. Just clicking on another row, or using the down arrow or up arrow keys will cause the change to be filed. Once editing has begun, the **Save Changes button** will appear when there are changes ready to be filed. This button is really just an alternative method of registering changes, since any movement out of the row will do the same thing. The Save Changes button is essential, though, when a Grid has but one row.

Clicking this button files any changes without the necessity of leaving the row.

Displaying and editing Borrow Citation records

The **citation information underlying the records displayed on any G**rid can be displayed by clicking on the + sign to the left of the record. This information is kept in the **tblBorrBibs** Table of QuickDOC.MDB and contains the following fields:

BorrBibRQNO	- Request Number, associates this record with tblBorrowItems
BorrBibCitation	- Citation information
BorrBibNoPages	- Number of pages in citation, used for Copyright reports, etc.
BorrBibArticle	- Title of the article borrowed
BorrBibAuthor	- Author of the article borrowed
BorrBibCopyright	- L or G, from the original request
BorrBib RefReason	- Referral Reason as indicated on Request
BorrBibPMUI	- PubMed ID, if applicable, will be used to flag dups
BorrBibPurpose	- Purpose of Request, for tracking type of activity

The highlighted cell is shown as above and any of the information displayed (except for the first cell, which contains the Request Number) can be edited in the usual fashion, by either clicking at an insertion point or typing over the currently selected value.

The insert seems to display best, by the way, when the record to be opened is toward the top of the Grid, where it displays underneath the current record, rather than at the bottom, where the display will move the current record to the top, and then display the child record underneath it. The effect of this movement can be confusing at first in the latter instance.

Displaying and editing Borrow Local records

Local Billing, Due Dates, Returned Dates for returnable items, and other information can be displayed by clicking on the + sign to the left of the record. Since this will toggle between the Citation Records (tblBorrBibs) and the Local Billing view (tblBorrLocals), you may have to click a few times before the proper view comes up.

In order to make this process a bit more accessible, if you press the **F4 Key** before clicking the **+** sign, the default will be for Local Information rather than the Bibliographic in both the Requests Outstanding and BorrowItem Backfile Grids. This option only occurs if the focus is in the **RQNO cell**.

This information is kept in the **tblBorrLocals** Table of QuickDOC.MDB and contains the following columns:

RQNO	- Request Number
ChgAsPatron	- Charge if a Patron Invoice is issued
Dept	- Department
ChgAsDept	- Charge if a Dept Invoice is issued
CostCtr	- Cost Center assigned for this item
Item	- Year and Title
LocalDel	- Internal Delivery Method
Rush	- Is there a Rush on this internally?
LocalStat	- Internal Payment Status, also on Backfile grid
Rec'd	- Date Item received
Paid	- Date Local Payment was received from Dept or Patron
Due Back	- Date Item is due back to Lender (returnable items only)
Date Ret'd	- Date Item was sent back to Lender (returnable items only)
Local Invoice	- Invoice number for Patron or Dept

There are also two columns in this view that are not displayed, although they can be uncovered by moving the vertical bar between RQNO and ChgAsPatron (for BorrLocalPat) or that between Rush and Local Stat (for BorrLocalCHRG) to the right:

BorrLocalPat	- Patron Number (not displayed)
BorrLocalCHRG	- Holds the final charge (not displayed)

The highlighted cell is shown as above and any of the information displayed (except for the first cell, which contains the Request Number) can be edited in the usual fashion, by either clicking at an insertion point or typing over the currently selected value. Some columns, such as the Delivery Method column, have dropdown lists to be used for changing values.

Local Charges – How and when are they computed?

The charges in the Patron and Dept columns are computed when the item is checked in (Status changed to **Received**, using any of the check-in methods), and are based on the **Local Charge Profiles** assigned to the Patron and Department. If you want to assign a different **Patron Charge** or **Department Charge**, wait until **AFTER check-in is complete** and assign changes only to Received items. Otherwise any changes you make may be overridden by the automatic calculation.

The final charge (which will appear in the undisplayed **BorrLocalCHRG** column) isn't figured until the decision is made to generate an invoice, or to mark an item internally as Paid. When the

invoice is generated, either the ChgAsPatron or ChgAsDept value is used, depending upon whether a **Patron Invoice** or **Department Invoice** is printed.

When an item is marked as Paid (with no Invoice having been generated), the charge assigned is determined by which of the **Local Status Choices** is used: **PaidPt** (i.e., **Paid As Patron**) uses ChgAsPatron and **PaidDp** (**Paid As Dept**) uses ChgAsDept.

If you edit any of these BorrLocal fields, the new entry will appear in blue and you will be asked if you want to save the change when you click the minus sign to close this view.
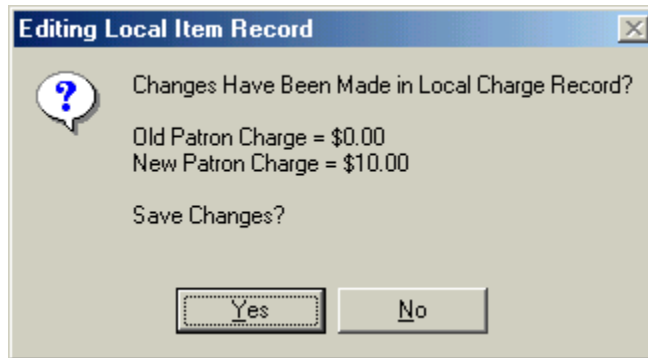
Loansome Doc Requests

For the most part, Loansome Doc requests are treated as a typical **Borrow Request**. **Loansome Doc Patrons**, even if they are out in the hinterlands and unaffiliated with your institution, come into the system at your behest and are considered your patrons on DOCLINE. Treating Loansome Docs as Patrons also allows for Local Billing to track and bill Patrons no matter which method they used to get the request information in to the library.

When Loansome Doc requests are first downloaded from DOCLINE they appear in the Requests Outstanding Grid with the **Status of Queue (Not yet sent)**. This is the natural state for a Loansome Doc when it is first received, since we're not sure whether it will be filled from the local collection or transferred onto DOCLINE. Though there is a Sent Date indicated, it is for the moment really an **In Queue Date**, since it hasn't been sent anywhere yet.

If this item can **be filled from the local collection**, it will skip the Outstanding status entirely and go directly to Received (think of it as if it were a complete DOCLINE transaction, and you've now got the item in hand, from your copier instead of the Mail Room, ready to give to the Patron).

When you mark a **Loansome Doc as filled on DOCLINE**, the update is saved in QDPortal (the filename is **LDXUpdt.txt**) and updated to the database, checking it in as **Received**, with today's date, with your LIBID as the Lender. If the update doesn't occur automatically, make the change manually on the Requests Outstanding Grid. In this way all your Loansome Docs, both those

you filled and those filled via DOCLINE, will be available for Billing and statistics in the same format.

If the request can't be filled from the local collection**, transfer it onto DOCLINE** in the usual manner.

The status should change when this activity is picked up through the Portal (the filename is **LDXTrfer.txt**), with new status value of Outstanding and the new Lender's LIBID replacing yours. If the update doesn't occur automatically, make the change manually on the Requests Outstanding Grid.

The **Source** column is on the far right of the Grid (you'll have to scroll to the right to see it). It indicates DOCLINE for regular DOCLINE requests and **LOANSOME DOC** for items input via LD (even if it later gets transferred onto DOCLINE, since this is how we track Loansome Doc activity). You can group together these Source groups on any Grid by clicking the Header of that Source column and choosing Sort Ascending (puts DOCLINEs at the top together) or Sort Descending (put LOANSOME DOCS at the top, together, after Source 'Other' if you have any).

Loansome Doc Changes in DOCLINE 2.5

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.

Most people will just use the Maximum Cost field of the Loansome Doc printout to decide whether to refer on to DOCLINE. QuickDOC 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 **ld_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.

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 newer versions of QuickDOC do a better job of parsing unusual Loansome Doc names than earlier versions, 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.

Loansome Doc Receipts Not Importing

Loansome Doc Receipts should be picked up automatically on any machine using the latest version of QuickDOC. If LD Receipts picked up on one machine don't seem to appear on another, check to be sure that one machine or the other isn't pointing to a different QuickDOC.MDB database location.

If, for whatever reason, some **LD Receipts haven't properly imported into the database**, there are a couple of ways to get the LD Receipt data into the database.

Use Add Borrow to manually enter the information in, using Loansome Doc as the **Source**. If you do this, you can also indicate the action taken on the request at the same time, if you know it. Here are the usual choices for Loansome Docs added in manually using this method:

1.   **Request Filled in-house**. If you filled the request, use your LIBID as the Lender and change the Status to **Received**, along with the correct Dates Sent and Received.

2.   **Request Not Filled in-house; not transferred to DOCLINE**. If you cannot fill the request and it shows **DOCLINE = No**, then use your LIBID as the Lender and change the Status to **Not Filled**, along with the correct Date Sent and that same Date as Date Received.

3.   **Request Transferred onto DOCLINE and item received**. If another library filled it, use that Library's LIBID as Lender, Status = **Received**, with appropriate Sent and Rec'd Dates.

4.   **Request Transferred onto DOCLINE but not yet Received**. Use Status Outstanding and the LIBID of the library where it was routed, if you know it.

5.   **LD Request receipted but not yet either transferred or filled locally**. Use Status of **Queue**, your LIBID as Lender, and Date Sent equal to the date the LD was receipted.

Using the above method, only numbers 4 and 5 will appear on the Requests Outstanding Grid and only those will need to be checked in later, when they are indeed received or retired.

Another approach (especially if the LD Receipts are within the last 40 days or so) is to use the **Status/Cancel feature on DOCLINE** for **Loansome Doc** Requests, **All**, **Days up to 40**. Click **Go** and, when the requests are displayed, click each Request Number in turn to get the **Full Display**. This will save the items again to the correct **QDPLDX.txt file**. After displaying all necessary LDs, exit QDPortal, start up QuickDOC and Import.

This will put them all into the database (as **Status Queue**). At that point you can use a printed copy of a file called **NoLDXUpd.txt**, located in the QDBorrow folder just beneath the database location, along with the **LDUpFail.txt** file, to try to automatically run the updates. If you change the name of the NoLDXUpd.txt file to **LDXUpdt.txt**, and move the file to the C:\QDBorrow folder, once you've got all the unupdated LD Receipts into the database, you can then click File, Import, QDPortal Borrow Items on the QuickDOC Menu Bar to run those updates through again. These only work for LDs you've filled yourself, but they will update automatically; the rest you can update on the grid as regular check-ins.

Tips when updating on the Requests Outstanding Grid

Usually when checking items in as Received, the program uses **Today's Date as the Date Received** (assuming that you're checking stuff in every day as expected). If you're doing a batch of old items, first **click the header on any grid column** and choose **Show All Grid Cols** from the list. This will expose the Date Received column as well as the Date Sent.

When checking an item in, **first change the date in the Date Received column** to the correct date. If the item is Received, you can then just click **Save Changes** since **Received is the default Status**.

If you're **doing a number of visible row check-ins**, change the Date Received on the first and just click into the Date Received column on the next one you want to check in. The row change will file the first one with Status Received and put you in position to enter the date received on the next. Saves a bit of time with only one click per row!.

Searching Borrow Grid Records

My boss is asking me how many loans have we gotten at no charge versus the amount we've paid for. Is there any way I can get this for either what we've borrowed or what we have loaned using QD?

The **Compute Totals** Report will give you average cost per Loan/Borrow but not absolute numbers for **Free** and **Not Free**. But we can get these numbers fairly easily from the Borrow Grid.

      1. Open up the Borrow Item Backfile and search by the relevant Dates

      2. Click **Search**; this will get you all records during that period.

3. Click the Header at the top of the **Chrg** column and choose **Sort Ascending**. This will put all the Free items at the top.

Click the **Record Selector** next to the first 0.00 row (it turns the row blue), scroll down to the last 0.00 row and, holding down the Shift key, click the Record Selector next to that row. They all turn blue and the "nnn Records Selected" gives you your answer at the top.

But this group also includes Not Filleds. If you want to eliminate those, click the 'Search By Status' ribbon button and choose Status Equals Not Filled. That will get you a list of Not Filleds for that period. Click the header over Chrg for that group and Sort Ascending. That will put the 0.00 Not Filleds at the top. Use the Record Selectors to highlight the 0.00 Not Filleds and you'll have the number to subtract from the 0.00 records selected in the paragraph above.

Print Borrow Grid Records

The **Print Recs button** provides a quick way to get a printout of a Grid. The first time you choose to print you'll be brought to the **Page Setup screen**, to choose your typical print parameters (**Margins, Orientation**, etc.).

Page Setup for Printing Borrow Grid Items

These are saved as defaults (in a file called **PageSet.dat**) and used for subsequent print jobs. If no settings are chosen, then the Page Setup form keeps coming up, so it's a good idea to pick a default setting. Also, when you change printers, or if you encounter a **Printer Not Found** error when trying to print from the Grid, you can force a new Page Setup by choosing **Reset Printer** from the File Menu. This will clear out the current PageSet.dat file so that all new values can be written for the new printer. You'll need to exit QuickDOC and re-enter for the **Printer Reset** to take effect.

Because the Print Setup is used mostly in the Grid Print process, the print-related choices on the File Menu are often not enabled if a Grid is not being displayed. If the choice you want isn't enabled, just open any Grid and populate it with some records. That should give you the following version of the File Menu (under File on the Menu Bar):

If the number of Grid records equals a print job of two pages or less, it will be sent directly to the printer. There are approximately 30 lines on each page for **Landscape** and 37 for **Portrait**, so that reports of fewer than 61 or 75 records, respectively, will be printed directly. If the report is longer than that, you'll first get a message box asking whether you want a **Print Preview** first, where you can choose the specific pages to print.

Under **Print some pages**, you can choose the specific pages to print.

In the example above, we've chosen to print the **first page, plus pages three and four**.

You can also choose to **print just Selected Records**. First, select the records you want to print by clicking on the Record Selector button (the leftmost column on the Grid). **Hold down the Ctrl key while selecting to add multiple records, or hold down the Shift key after selecting the first record and click the Record Selector of the last record in the group to select all records in between.**

[**This is the Record Selector column**.]   [**All dark blue rows are selected**.]

Add Borrow Item Form

Selected with the Toolbar **Add Borrow button**, or from the Menu Bar under Add New, and Borrow, this form adds a record to the Borrow Item backfile. It can be a **Non-DOCLINE item** or an **item not successfully captured through QDPortal**. The Add Borrow Item Form also includes access to the **Libraries List**, for selecting the Borrowing Library, the **Patrons List**, for selecting a Patron, as well as a **Journal Titles List** (which is searchable by Title, ISSN or NLM UI), which can also be used for incremental data entry. You can also use the **Down Arrow key** to locate the Library (or Patron or Journal Title) and the **Enter key** to choose the highlighted selection and transfer the information to the Add Borrow Items form.

Copy Service Items

Copy Service is a special category of **non-DOCLINE request**. Copy Service items are always considered Borrows rather than Lends. It's similar to the way we treat Loansome Doc transactions. Because the entity receiving services here is an individual, rather than a Library, using the Borrow side of the transaction makes sense.

In general, use the Add Borrow choice to manually add Copy Service items (although there are libraries that use **Loansome Doc** to get the item info into the system, and then just change the source from Loansome Doc to Copy Service). It should be possible, though, to get almost the same level of speed with the manual entry in Add Borrow as you can going through Loansome Doc, without putting any extra strain on the LD system.

Here's how Copy Service works:

1. QuickDOC has a built-in **Source** value called **Copy Service**. This value is meant to capture items filled from your collection for affiliated patrons, but it can be assigned to any Borrow Item you decide fits that description. If your main non-DOCLINE Source is Copy Service, make this your **default Source** by choosing it from the combo box **Default Source when adding non-DOCLINE Requests** on the General Tab of the Local Preferences form. By so doing, and by unchecking the **Suppress use of standard non-DOCLINE Prefixes** box, you can be sure that the Add Borrow form will automatically come up with **Copy Service** as the default and with a **unique number** to identify the item. The Local Preferences Form is under **Setup** on the QD Menu Bar, Set Local Preferences.

2. Once you've added **Copy Service** as your **default non-DOCLINE Source**, that value will appear each time you click the **Add Borrow** Toolbar button to add a new Copy Service request. QD will also create a unique Request Number, based on COPY (the Source), Date (yymmdd), and a number, starting at 1, that will be incremented by 1 with each request that day. All of this is to ensure that all items have unique Request Numbers not easily matched in DOCLINE (or any

other system, for that matter). E.g., my first request number for Copy Service on February 1, 2007 would be: **COPY0702011**.

3. QuickDOC treats Copy Service requests differently from ILL requests. Copy Service items are excluded from Borrow totals. (They will appear on Compute Totals (Borrowing) Reports as a separate line and aren't included in ILL Borrow totals.)

4. **Copy Service items are available for Local Billing**. They can be included in any regular local invoice, along with ILL charges, or printed separately, as **Copy Service Invoices**. (Use the Billing Prefs Tab on the Local Preferences Form to indicate whether you want to use a **Separate Copy Service Invoice**?.)

5. You'll want to assign Patrons (or Departments, if you bill back by Department) **Local Charge Profiles** that reflect their exposure to charges. The default charge that QD assigns to each Patron is computed from the Local Charge Profile assigned to that Patron. If you have a standard charge for Copy Service, you can make a Local Charge Profile called Copy (or something similar), assign the charge, and then assign that profile to each new Copy Service Patron.

If you have patrons that use both ILL and Copy Service, and your charges are different for each category, just make a decision as to which category the patron uses most often and assign the corresponding profile. You can always change these charges on the **Local Billing Grid** for those items assigned an incorrect charge, but it's time-saving to let the default do the work as often as possible.

Values in this group are related to **Local Billing** and management of **returnable items**. The **Local Chrg** (Pat/Dept Charge) is the amount that will be (or has been, if it's already been paid) charged to the local Patron, Department or Cost Center in Local Billing. Anything entered in **Pat/Dept Chrg** will be saved in all three Charge fields (**LocalCHRGAsPatron**, **LocalCHRGAsDept** and **LocalCHRG**) in **tblBorrLocals**.

Lists in the Add Borrow Form

If you begin typing the Library's **LIBID** when the **Libraries List** pops up, the selection will begin traveling down the list until it reaches the LIBID in question (assuming it's already in there).

Clicking on that list item (or pressing **Enter** when the item is highlighted) effectively registers your choice. Once you choose the Library from the list, **the Library's values for LIBID, Charge (for the Delivery Method indicated) and EFTS are filled in at the same time**. If you don't want to

use the Lookup List, you can **enter the LIBID directly** (assuming you know what it is) by exiting the Libraries List without making a choice:

1.   Double-click in the LIBID box (or press the Left Arrow Key) to return focus from the Libraries List to the Borrower box on the Add Borrow Item form.

2.   Type in the LIBID.

Check the libraries box to the right and it should match if your typed-in value is in the database.

Default values are also the settings for each of the Combo Boxes, although any others can also be chosen from the dropdown list.

Enter the Patron from the Patrons List in similar fashion. You can also search the Last Name, Department and Cost Center fields to narrow down the choice.

In order to track Patron activity, you should create a Patron Record if the name you want isn't already on the list. Use the **Add Patron button** to get to the **Patron Information Form**.

The program keeps a table of **Journal Titles**, **ISSNs** and **NLM UIs**, sorted alphabetically by either ISSN or Journal Title, which can be used for authenticated data entry. Choosing an item from the list will fill in both the Title and ISSN text boxes.

The first match after three digits will move those values over to the Add Borrow Item form. But keep entering the ISSN until it travels down the Journal Titles – ISSN List to the correct Journal

Title. At that point press Enter or click on the entry to move the values for ISSN and Journal Title over to the Add Borrow Form.

If you don't know the ISSN, leave it blank and press Enter twice to use the Title box in much the same way as the ISSN box: For an **incremental Journal Title Search** begin typing the Journal Title, using the common QuickDOC abbreviations (see below) and the list will be populated after the third character. Continue typing until you reach the desired title (it would require Br J ha to get to Br j haematology, for example).

You can also use the **Journal Search button in the Add Borrow Form** to search on title words:

would return all titles with "trauma" in the Journal Title.

Use the **New Journal Title button** to move to the **Add/Edit Journals Form** to add a title.

Once the Journal ISSN and Title have moved over, a new **Edit Journal Button** appears, which can be used to move directly to the Add/Edit Journals Form.

If the Journal Title is not on the list, you can add the Title and ISSN so that it's included in future lists, or you can just add the title for this request only (without the ISSN). Since we don't keep track of ISBNs, this will always be the case for monographs.

When entering titles directly, either here or in the Edit/Add Journal Title form, try to use the list of Journal Abbreviations that appears just off the right side of the form, so that future sorting and displaying of Journal information can be consistent. You can enter a Journal abbreviation by clicking on it, or simply by typing it in on the form.

Journal Abbreviations used in QuickDOC are few and fairly standard.

Journal Abbreviations

An attempt will be made to automatically format data entered for **Citation information**, etc., so that keyboard data entry can be as efficient as possible. In general, the following rules obtain:

1. You can retrieve the last entry made in any text box during the current session by pressing <F3>.

2. Lender and Patron entries are made from the appropriate List. For **Lender last entry** and **Patron last entry**, first press the **left arrow key** to exit the list, then press <**F3**>.

3. The Dept box is always filled with the Dept filed with the Patron.

4. Entries with Combo Boxes respond to typed entries by travelling down the list of choices.

5. ISSN and Title boxes present a list matching the first three letters typed and then travel down that list for each additional letter typed. Press Enter when the correct item is reached.

6. Lender Charge and Local (Patron/Dept) Charge boxes are completed with the default charge filed for that Delivery Method in the Lending Library and Patron record specified.

7. The Max Cost box is automatically given whatever value is entered in the Charge text box.

8. Date fields and Combo Boxes retain the values from the previous entry as defaults.

9. All citation information (including Month) can be typed in lower case and QuickDOC will attempt to reformat after you press Enter for that field (you can press the Up Arrow, or Shift-Tab, to return to a previous field if the automatic format is not to your liking).

10. When typing in page numbers, if you press the dash (-) after the **Start Page** the cursor will jump directly to the **End Page**.

11. The Print Copy Checkbox will retain its last value (True or False) from session to session.

12. The Alt-A accelerator key will work to simulate a click of the Add Record button from anywhere on the form

The complete Add Borrow Item form will look like this:

The **Borrow Note** field (not shown above) appears just above the yellow Help box and permits entry of 50 characters. The Payment Number for any **Payment to Lender** always appears at the beginning of this field and should be left in that position, with other information added after it.

The **Print Copy checkbox** determines whether a printout of the information for this request will be after the record is added. If you want hardcopy printouts of each item added, check this box. Once the box is checked (or unchecked), that value is filed in the tblLocals table of QuickDOC.MDB as

PrintBorrowAdd = True

and becomes the default thereafter.

Requests are printed two to a page, so you won't actually see the first printout until after the second request is entered. If the Exit button is clicked after an odd number of records were added, the last request will be printed at that time on a page of its own.

Since these printouts use your Default Printer, it will also use whatever default settings your printer was left at during your last print job. Watch out for situations where the printer was left at Landscape instead of Portrait, or where some other application set the printer to some special setting and never reset it back. Strange characters may result in the latter case. Turning the printer off and on will usually reset the default settings.

Print Format of Added Borrow Request

Borrows added using the Add Borrowed Item Form have the following format:

Added Borrow Request Number: 44296
Date Added: 7-Nov-01

Journal Title: Cortex; a J devoted to study of nervous sys
Citation: 2000 Apr;36(2):195-211

Article Title:	New learning and remote memory.		
Article Author:	Poliakoff E		
ISSN:	0010-9452		
Request Status:	Received	**Source of Request:**	DOCLINE
Item Type:	Journal	**Item Form:**	Copy
Delivery Method:	Mail	**Referral Reason:**	NOT
Copyright:	CCG	**Purpose of Request:**	PC
Patron:	Coletti, Margo		
Dept:	LIBR		
EFTS Pmt:	False	**Rush Request:**	False
Lib Charge:	$11.00	**Local Chrg:**	$11.00
Sent To:	ILUAMA	**Local Del Method:**	Interoffice Mail
Date Sent:	7-Nov-01	**Local Status:**	Open
Date Recd:	7-Nov-01	**Cost Center:**	
Date Paid:		**Date Paid Local:**	

Local Information

Values in this group are related to **Local Billing** and management of **returnable items**. The **Local Chrg** (Pat/Dept Charge) is the amount that will be (or has been, if it's already been paid) charged to the local Patron, Department or Cost Center in Local Billing. Anything entered in **Pat/Dept Chrg** will be saved in all three Charge fields (**LocalCHRGAsPatron**, **LocalCHRGAsDept** and **LocalCHRG**) in **tblBorrLocals**.

The **Local Delivery Method** refers to the method by which the item goes from the Document Delivery operation to the Patron. It is often the same as the main Delivery Method (and will always be the same if the item is shipped directly to the Patron) but may also be different. **Pickup is the default**, but if you change that method, the new method will become the default for the next item added.

Local Status is either Open, InvPat, InvDep, PaidPt or PaidDp.

Date (Local Item) Paid is for the local (Patron, Dept, Cost Center) payment, not the payment to the Lender.

Date Due (back to the Lender) can be entered for Returnable items.

Date Returned (to the Lender) can also be entered for Returnable items.

Local Invoice # is for cases where you are re-entering an item for which an Invoice has already been sent.

Dates on Added Borrow Records

Today's Date will be the default date for records added, but previous values are kept from record to record in most cases, so that repetitive data entry might be reduced. In all data entry Date fields, the format is now **mmm dd, yyyy**, so that International dates can be entered in a format understood no matter what the machine's Date setting format might be. If you press "D" in the Date Rec'd text box, below, the entry will jump to "Dec" since that's the only match. You can also use the dropdown calendars, as always, for entry of dates.

EFTS Request: ☐   Rush? ☐

Copyright: CC [G ▼]   Date Rec'd [Mar 19 2002 ▼]   Date Processed [Mar 19, 2002 ▼]   Date Paid [___ __, ____ ▼]   [Clear Form]

Enter Date Request Was Received.
Function Keys: <F3> = Today <F4> = Open Calendar <F5> = Clear

Entering Multiple Borrow Records

There are **function keys in Add Borrow Data Entry Fields** that may help with data entry when entering multiple records.

The <F3> Function Key will Restore the Previous Entry in this field.

The <F5> Function Key will Clear this field.

The **function keys in Add Borrow Date Fields** have specific duties:

The <F3> Function Key will enter Today's Date.

The <F4> Function Key will display the Calendar (useful if your hand is on the keyboard, not the mouse).

The <F5> Function Key will Clear the field.

Patrons

Records for Patrons are held in the QuickDOC.MDB database primarily in the **tblPatrons** Table, with associated records in **tblPComms**, **tblPDCharges**, **tblPatronPrefPmts**, **tblPDAddrs**, **tblPrefixes**, **tblStatus** and **tblSuffixes**. Lists of Patron records are available in a column on all Borrow Grids, as well as through the Patrons List.

The Patrons List

Displaying Patrons

Records for Patron are primarily accessed through the **Patrons List** (on the Toolbar) as well as under "**Lookup**" on the **Menu Bar**, under Patrons. The Patrons List also pops up in other places, such as when you're adding a new Borrowed Item, or when searching by Patron in the Local Billing Grid, so that the Patron can be chosen from the list.
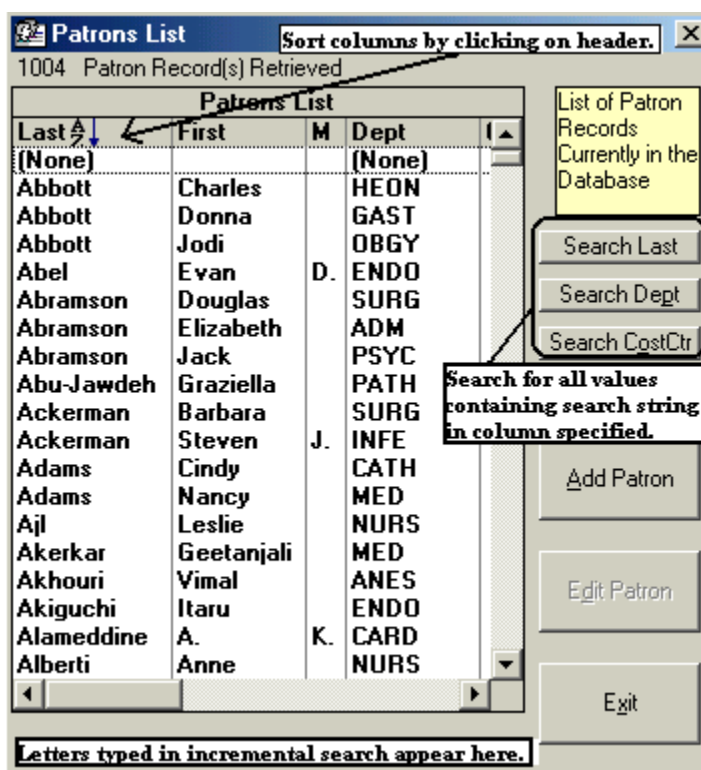
The list shows the Patrons in your file alphabetically **by Last Name**, which is the default sort order. Start typing the first few letters of the Last Name to jump ahead on the list, or use either the Down Arrow key or the Page Down key or the scroll bar at the right of the list to navigate further. (the **None Record**, by the way, is a place saver for No Patron, and can be used in records where the Patron name is unimportant, or when you want to delete a Patron record while the Patron you want to delete still has backfile activity in the database. The horizontal scroll bar at the bottom will expose the Cost Center column of the list if you drag it to the right. If you hold the cursor over any entry that is wider than the column width, a tool tip will appear with the full name visible.

As an item is selected (either by clicking on that line or by pressing Enter after moving down the list until the Patron you want is highlighted), the **Edit Patron Button** is enabled (to switch from Edit Patron to Add Patron, click '**Clear Choice**'; the List will then be set to the topmost entry and the **Add Patron Button** will be enabled).

Searching for a Patron

You can search the Patrons List for specific matching entries by clicking on one of the search buttons. You can search the Last Name column, the Department column, and the Cost Center column. When you click the appropriate button, an input box will pop up. Enter any amount of characters you want matched and the list will then display only those records where that matching group of characters appears anywhere in the field.

To choose or edit a Patron, click on the line that contains the entry you want: the '**Edit Patron' Button** will be enabled and that Patron will be your current choice.

To **reset the Patrons List** after a search to its full number of entries, click once on any item in the list to highlight it, and then either click the Clear button or click the header at the top of the Last column to start the sort on that column.

Sorting the Patrons List

You can sort the Last Name, Department or Cost Center columns in ascending or descending order by clicking on the header at the top of the column.

Deleting Patrons

Click the Edit Patron button to bring up the complete Patron Information Form, and then click the **Delete Patron button** on the lower right of the General Tab.

If the Patron has any activity in the database, other than in the tblPatrons Table, itself, you'll first need to transfer that Patron's activity to the (None) Record by using the **Transfer Activity button** and pointing to the **(None) Patron Record**. See **Transfer Patron Activity to (None)** under Patron Information Form, General Tab, below, for more information.

While the **Transfer Activity button** will do the job, changing the Patron referred to in a variety of Tables from the real Patron to the placeholder (None), the default record, it's worth considering what might be lost. First of all, there will be no Patron to refer to in future reports. While the Dept and Cost Center information for each request will remain, any Patron-related information (such as Patron Status or Suffix) will be unavailable for reporting purposes. **Local Payment information** will also be transferred to the (None) Patron record, where it's aggregated with all the other (None) transfers. And finally, **once this transfer is made, there is no easy way to reverse it**.

Editing Patrons

Click the Edit Patron button to bring up the complete **Patron Information Form**.   Double-clicking a line is the equivalent of selecting it and clicking the Edit Patron Button, and will also open the Patron Information Form.

Inactive Patrons

Inactive Patrons are not included in the Patron List that displays in **QDPortal** at the upper right of the screen during the DOCLINE session. On the Patrons List in the main QuickDOC program, they are displayed, but with an [I] (for Inactive) at the beginning of the MI field to alert you to their status:

The **[I]** is actually included at the beginning of the **Middle Initial field** and is automatically added or removed when you change the Active status on the **Misc Tab** of the **Patron Information Form**. Consequently, while it is possible to add it or remove it directly, checking or unchecking the Active checkbox is the preferred method (since adding an [I] to the MI field won't actually change the Active value!). Because it's added at the beginning of the field, it preserves the actual Middle Initial, but only if that value is 3 characters or less, since the maximum length of that field is six characters.

Patron Information Form

The Patron Information Form consists of five tabbed forms, located by clicking on the Tabs at the top of the form or by pressing Enter (or the Down Arrow) in the last control on the previous form, except on the Misc Tab, which is the last Tab visible. Pressing an Up Arrow from the topmost control of any form except the General Tab will move back to the previous Tab.

Patron Information Form – General Tab

The General Tab presents general Patron information, along with a snapshot of values set on other Tabs, including Local Address information; phone, fax and email data; Cost Center and Local Charge Profile.

The **LastName** and **First Name** fields are self-explanatory. The **Middle** field is technically for Middle Initial, but it can hold up to six characters, so it may contain an entire middle name (especially if this helps to differentiate Patron records) in some cases.   The **Local ID Field** will initially contain the old DOS QuickDOC Patron Number, if you have imported Patrons from old QD, but is thereafter free for use in whatever scheme you have, locally, for identifying Patrons (Employee Number, SSN, etc.). The **Mail Stop** field is for local mailing address, usually a **Room Number** or **PO Box**.

 The **Dept** (Department) field is a dropdown combo box with all registered Departments listed.   If you **change the Dept value in a Patron record**, you will be asked (when you have finished editing and click either Apply or Ok) whether you want this **new Dept value to replace the old value in QuickDOC.MDB** for any instance of the Patron record in QuickDOC.MDB. You can see the Message Box below, in the Clone Patron section.

If you say Yes, then all values in any table of the QuickDOC database that also hold a separate Department value will change that Department value to this new one. This is an easy way to make a **Global Department Change for any Patron**.

The remainder of this Tab shows current values from other Tabs (to permit one-stop lookup of common values; if you want to make a change to one or more of these values, move to the Tab specified) plus various command buttons for performing certain functions or accessing the Local Addresses form.

Transfer Patron Activity

This is a quick way to **Merge Patron Records**. To transfer activity from one Patron record to another, use the following steps:

1. Compare the old Patron record to the new, adding any unique data from the old record to the new record on the appropriate Tab.

2. Bring up the old record, and click the **Transfer Activity button**.

3. The Patrons List will appear. Choose the Patron you want to transfer activity **to**.

4. A message box will appear (as illustrated here for a transfer using two patrons with nearly identical names):
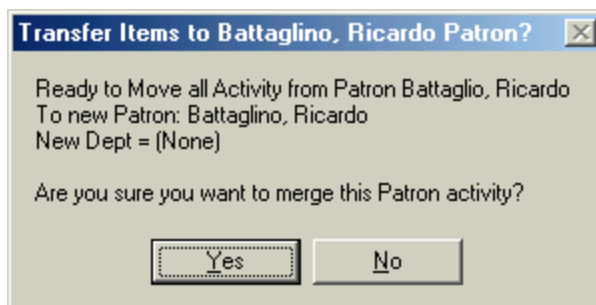
5. Click **Yes** if you want to move all activity in the database that is now assigned to the patron on the first line to the patron on the second line.

6. Click **No** to back out of the entire deal.

7. If you click Yes, all the activity assigned to the first patron in any table within QuickDOC.MDB will be assigned to the second patron. You'll next be asked if you want to delete the old record:
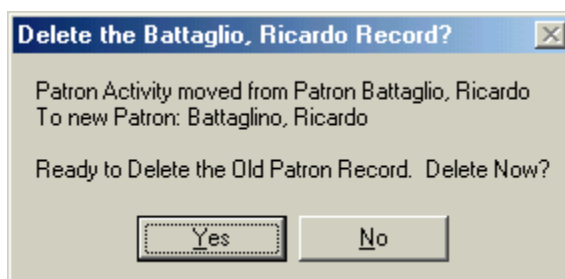
8. Click **Yes** to delete the old record (the usual choice) or **No** if you want to keep it around for some reason.

Transfer Patron Activity to (None)

This is the way to **Delete a Patron Record while preserving all its associated item records**. As an example, Patron Allbrich, in the Grid below, is seen to have two records in the database (this was an All Records search using the By Dates button), both Received in 2002 and one of them with an associated charge of $5.00 paid by the Patron. Both records have a Dept, MED, and a Cost Center, which happens to be Dept of Medicine, rather than a numeric value.

To delete Patron Albrich, while retaining the other values, use the following steps:

1. First edit the Patron by clicking Edit Patron on the Patrons List

2. Bring up the old record, and click the **Transfer Activity button**. The Patrons List will appear. Choose the (None) record at the top of the form.

3. A message box will appear referring to the prospective transfer (and also noting that the Dept value will not be replaced):
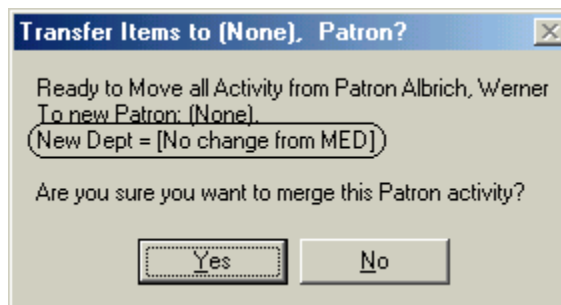
4. Click **Yes** if you want to move all activity in the database to the (None) record.

5. Click **No** to back out of the entire deal.

6. If you click Yes, all the activity assigned to the patron in any table within QuickDOC.MDB will be assigned to (None). You'll next be asked if you want to delete the old record:
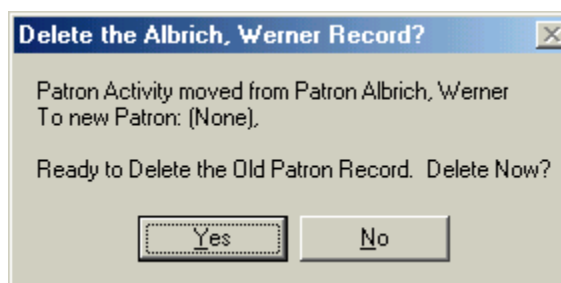
Click **Yes** to delete the old record. A look at the two Albrich items in the Local Billing Grid will now appear as

After Merge to (None), Patron records change, Dept and Cost Ctr don't, any payments are re-directed to the (None) record, Open items are 0.00 for Patron. | checked). (Using Patron Charges) <F2> (or Double-Click) To Edit Field ☑ Also Show 0.00 Item

All Local Billing Items - By Request

▼		RQNO	Patron		PatChr	Dept	CostCe	Item	Local	Ru	Local	Recd	Paid On	LocalInvoice
	⊹	7654269	(None)	▼	$5.00	MED	Dept Of	1996 Health care	Pickup	No	PaidP	8/6/2002	8/5/2002	Pmt000003
	⊹	7644197	(None)	▼	$0.00	MED	Dept Of	1996 Health care	Pickup	No	Open	9/3/2002		
	⊹	351627	Abramso	▼	$0.00	ADM	Dept Of Medicine	nesthesiol	Pickup	No	Open			
	⊹	1194205	Arndt	▼	$0.00	DERM		2000 Acta dermat	Pickup	No	Open	11/30/200		
	⊹	2827922	Bekhtl	▼	$11.00	ANES		1997 J endovascu	Pickup	No	Open	4/30/2001		

As you can see, the Patron Name Albrich has been replaced with (None). Dept and Cost Center remain the same. The payment remains, but it is now assigned to (None) as the Patron making the payment in the **tblPatPayments** (table of **Payments made by Patrons**).

Transfer Patron Activity to a Generic Record

The (None) Record will suffice for most cases where you want to **delete a Patron Record but also keep the individual item activity**, but a variation on this was suggested in a QuickDOC-L discussion: **Generic Patron Records** that would comprise values that we might want to persist in retrospective reports, etc.

One case that might illustrate this would be a generic Patron record for Lastname **OldNursing**, Firstname **Patron**. This record would continue to have the Department code for Nursing, and would have the Patron Status NURS, which would be common to other nurses' patron records. If the nursing cost center was shared by all, then the OldNursing record could have that as well (otherwise empty). The address values could be the Nursing Office; the Comms values as well. The Charges values would be the same for all Nurses, anyway, as would the Misc values.

Once this Patron Record is created, any Nursing Patrons who leave the institution can be Transferred to this record, and their individual Patron Records deleted. This reduces the Patrons List to its minimal length while permitting various retrospective reports to be run in the future using correct Patron Status, Dept and Cost Center values.

Unfortunately, this strategy will only work for Patrons where the Generic Record also closely matches the Dept, Cost Center, Address and Patron Status of each individual record. It may work for Patron Status NURS or DD or STAFF, but perhaps not for other patrons. In those cases, use the built-in (None) record.

Clone Patron

This is a quick way to create a **Second Matching Patron Record**. To make a clone of the current Patron Record, click the **Clone Record button**. The primary use for which the Clone Button is intended is to create an exact copy of the current patron record, which will then be available for changing only the field(s) necessary to distinguish between the two. Typically, if you have a Patron whose requests should be charged to **more than one Cost Center or Department**, you'll need to make two records for that patron: one for each Cost Center or Department, so that you can choose the correct assignment right at the point of first entry. Use the following steps:

1. Make the first Patron record (if it hasn't already been made) using one of the two (or more) Cost Centers or Departments. Here's an initial record, with the initial Patron record number (45) at the upper left corner:

2. To create the clone, click the Clone Record button, and a new record, with a new Patron number (4739, below), will be the current record. All the record's values (except the Patron number) will be the same as the first record. Change the field (e.g., the Department field, below, changed to OBGY, or the Cost Center field on the Charges Tab), necessary to make this record distinctive:

3. Make any other changes for this new record and click Ok. If you made the change, as above, in the Dept field, QuickDOC will ask whether you want to **change ALL previous requests from this Patron to the new Dept** (as it does with any Dept change in a Patron record):

4. Since there aren't any 4739 Eowyn Dalys in any table (the search is by Patron Number, not Name, and any Eowyn Dalys with activity will be under the first Patron Number, 45, not this one, 4379, since we just created it), you can safely click either button. Most will click No, I would guess, in any event.

5. When you click Ok to finish you'll find yourself back in the Patrons List and you'll see this new Daly, Eowyn record in the List, with the new Dept, etc. In addition, this new record will now also be listed, right beneath (or above) the first one, in the Patrons List that appears in QDPortal online, so that you can select the correct Patron/Dept/Cost Center at the time you send the request.

Editing Patron Name or Dept From a Borrow Grid

When you come to the Patron Information form by clicking the **To Patrons button** on a Borrow Grid, you can make Patron Last Name, First Name and Dept changes, along with changes to any other fields in the Patron record. When you make changes to the first three fields, however, changes must be cascaded through many other **associated tables** in QuickDOC.MDB. And when this cascading occurs while a Grid is displaying data, the Grid must be closed, the changes

made (if any), and the Grid re-fetched and re-displayed. Since this may take some time, you'll see a message displayed while the Edit form remains visible:
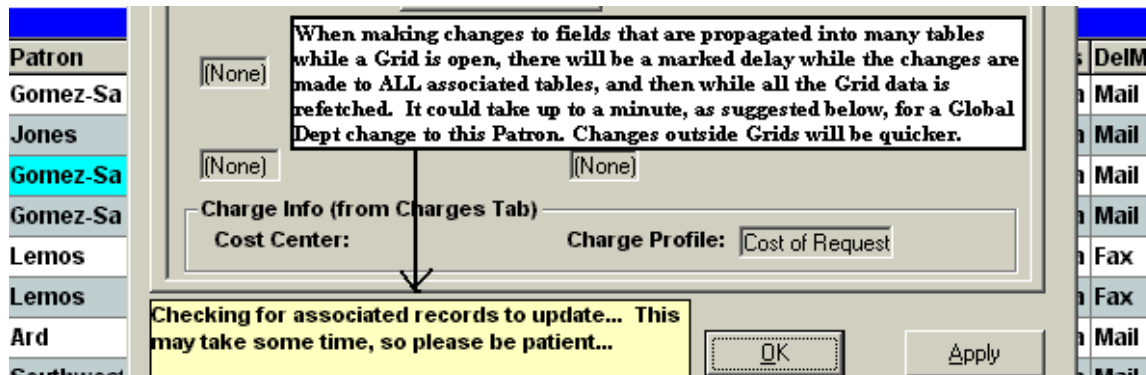
Since the wait can seem interminable while you're itching to get on with more changes, it makes sense to make any extensive changes to Last Name, First Name or Department fields using the Patrons List rather than the To Patrons button on a Borrow Grid. But if you do make changes from the Grid, just be patient: the hourglass really will go away, eventually.

Clear/Reset Patron Record

Clicking the **Clear/Reset This Record Button** on the Patron Information General Tab sets all values back to their defaults for an empty record and prepares for the creation of a new record. The values on the form are the same as if you had arrived here by clicking the Add Record button on the Patrons List.

Local Addresses Form

The Local Addresses form is available from either the Patron Information form or the Department Information form by clicking the **Edit Local Address button**. Because addresses for Patrons and Departments are often identical, it makes sense to save this information once and assign it to individual Patrons or Departments rather than repeat it for each Patron or Dept record.

This information is stored in **tblPDAddr** in QuickDOC.MDB and can be added to or edited by clicking the Edit Local Address button on the General Tab of either the Patron or Department Information forms.

Each **local address record** is given a unique record number in the **PDAddr Table** (the record number for **Institution Name (Address)**: Beth Israel Deaconess; and **Street1 (Address)**: 330 Brookline Ave.; is 2, in the sample below), and that record number (field **PDAddrID** in the PDAddr Table) is then assigned, if selected, to Patron and Department records when choosing the Local Address from the combo box (it's held in the **PatronAddrID** or **DeptAddrID** field of the appropriate table).

Anytime an address is needed for a Patron or Department, a lookup is made in tblPDAddr for the values in the record number of the appropriate AddrID field. The **Local Address Information** Form looks like this:

Institution Name: This will be the General Institution in most cases but may also be an alias or internal moniker. It may be a completely different **institution for Loansome Doc Patrons**. It may also be blank, which may signify no local institution or the default local institution or just a missing value. You can see that the potential for duplicates here is fairly strong. The **MergeAddr button** will be useful to bring these duplicate (or redundant) addresses together. The field name is **PDAddrInstName** and allows 60 characters.

Adding a Local Address

To add a new Local Address, first clear any current information by clicking the **Clear Choice button**, then add the necessary information and click either **Apply** (to add the new record and prepare to add another one) or **Ok** (to add the new record and exit).

Deleting a Local Address

To delete a Local Address, click on it on the list, to move the values into the edit boxes, and then click **Delete Addr**. If the address hasn't been assigned to any Patron or Department, then the delete will be performed. If it is assigned to any Patron or Department, you'll get a message box:

Reassign any Patron or Dept records and try deleting again.

Automatic Capitalization

In most cases, when you are entering information into a new field (no previous data value), QuickDOC will try to capitalize entries based on a rule. Usually it's the first letter capitalized for each word, but the Help box that displays when the field is entered will usually let you know what kind of capitalization or formatting will be applied to any entries in that field.

Whenever (as above) the help box says something like "**Normal Caps assigned at initial Data Entry**" it means that QuickDOC will try to assign **automatic capitalization** based on the initial letters of words typed into that field. In the Institution Name field above, if you were creating the record, you could type "beth israel deaconess medical center" into the Institution box and, after you pressed Enter or Tab or clicked on another box, the entry would re-assemble itself and print out in the box as "Beth Israel Deaconess Medical Center," with the first letters of each word in **uppercase**, which happens to be as it should be.

But what if you wanted an institution named "BIDMC Medical Center?" If you type "bidmc medical center" into the Institution box and press Enter, you'll see "Bidmc Medical Center" after pressing Enter, which is close but not exactly what you wanted to enter. Unfortunately, even if you type "BIDMC Medical Center" in most of these fields, it will first re-set to **lowercase** characters and then apply the capitalization to the first letters, with a result exactly like the first.

If you're worried about the capitalization that might be applied, enter the value in its proper format and press Enter. Any format/capitalization changes will be applied and displayed immediately. If they are not to your liking, press the UpArrow key or Shift-Tab or just click back into the field you're not satisfied with and re-type the correct field values, just as you want them to be displayed. In the case above, manually change the "idmc" in the field to "IDMC" and press Enter. Once the field has an actual value, entries are no longer vetted for capitalization and are assumed to be edits.

The general rule is that, for **initial entries into empty fields**, QuickDOC tries to add the proper **capitalization**, so that you don't need to think about Shift Keys while entering information. But if this should result in a bad capitalization format (like Bidmc or Nih), just register the change (by pressing Enter or Tab or clicking on another box) and then click back (or press Shift-Tab) into the box where the change needs to be made to correct the format (change idmc to IDMC or ih to IH), and then Enter (or Tab or anything to exit that box) so that the change can be registered. (Box should now read BIDMC Medical Center or NIH or whatever.)

Street1 is the first line street value of the address. **DON'T** use the **Mail Stop** value (usually Room Number or local PO Box) since this is held in individual Patron or Department records. The field name is **PDAddrStreet1** and allows 60 characters.

Street2 is the second line street value of the address. **DON'T** use the **Mail Stop** value (usually Room Number or local PO Box) since this is held in individual Patron or Department records. The field name is **PDAddrStreet2** and allows 60 characters.

City is the city of the address. The field name is **PDAddrCity** and allows 60 characters.

State/Province is the State or Province of this Address Record. It's selected from the dropdown list of StateProvs. To be eligible for entry in the State/Prov field of any QuickDOC Table, the entry must already exist in **tblStateProvs**, the State/Provs Table in QuickDOC.MDB. If your entry isn't in the dropdown box, first edit (or add to) the StateProvs Table and then start up QuickDOC again; the new values should be in the dropdown box. The field name is **PDAddrStateProv** and allows 6 characters.

Postal Code/Zip is the Postal Code of the address. The field name is **PDAddrPostalCode** and allows 20 characters.

Notes on the address record can also be entered. The field name is **PDNote** and allows 50 characters.

Unique records in the PDAddr Table are identified by the combination of the Institution, Street1 and Street2 fields. Because the matching value might be in either Street1 or Street2 for a specified Institution value, both are searched when looking for duplicates. Nevertheless it will be common to see duplicate records, especially when one or another of these three values have been left blank. It is therefore expected that the Merge Addr button will be used, from time to time, to reconcile these near duplicates.

Merge Address Records

This is a quick way to **Merge Duplicate Address Records**. Any Patrons or Departments using the old record number will be switched to the new. Use the following steps:

1. Compare the old Local Address record to the new, adding any unique data from the old record to the new record.

2. Bring up the old record by clicking on it in the **Local Address List**, and click the **Merge Addr button**.

3. You'll then be instructed to choose (again from the Local Address List) the record you want to transfer activity **to**.

4. When you click the row for the new address record, a message box will appear so that you can confirm your choice:
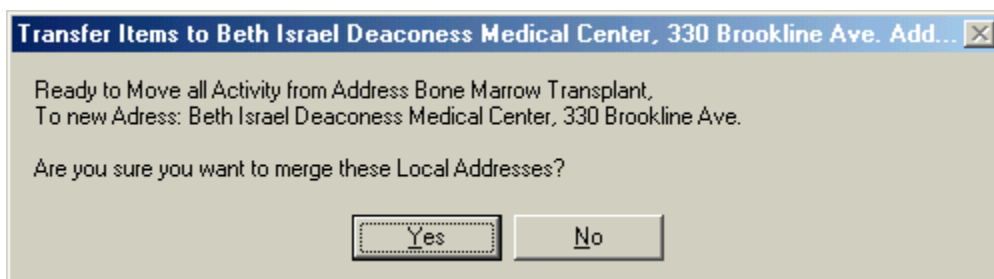
5. Click **Yes** if you want to move all Patrons or Depts now assigned to the old address (Bone Marrow Transplant, in this case) to the new address (Beth Israel Deaconess).

6. Click **No** to back out of the entire deal.

7. If you click Yes, all Patron or Dept records with the old Local Address ID will be assigned the new Local Address ID number. You'll next be asked if you want to delete the old record:
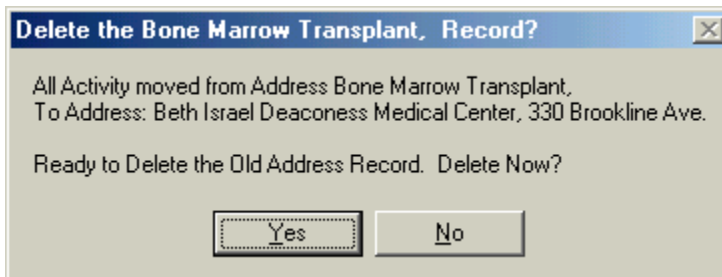
8. Click **Yes** to delete the old record (the usual choice) or No if you want to keep it around for some reason.

Patron Information Form – Comms Tab

The Comms Tab has local communications information. For Loansome Doc Patrons, some of this information may have been imported from a DOCLINE request, if it was available there.

This information is stored in **tblPComms** in QuickDOC.MDB and is associated with the main Patrons Table with a matching ID Number (it matches the Patron Number). The field name is **PCommID**.

Area Code (Voice) is telephone Area Code. The field name is **PCommAreaVoice** and allows 10 characters.

Voice Number is rest of the Voice number, including any extension. The field name is **PCommVoiceNumber** and allows 20 characters.

Area Code (Fax) is fax Area Code. The field name is **PCommAreaFax** and allows 10 characters.

Fax Number is rest of the fax number, including any extension. The field name is **PCommFaxNumber** and allows 20 characters.

Page Number is the Patron's pager number. The field name is **PCommPager** and allows 15 characters.

Preferred Delivery is a note on how the Patron prefers to receive the item. It reveals a dropdown Combo Box with whatever values are in the **Local Delivery Methods** (**tblLocalDeliveryMethods**) Table of QuickDOC.MDB. Default values are similar to the DOCLINE Delivery Methods: **Ariel**, **Email (pdf)**, **Email (tiff)**, **Fax**, **Mail**, **Pickup**, with some obvious additions: **FedEx**, **Interoffice Mail**, **Messenger** and Other. These values may take on more significance in the future as more items are delivered automatically and to the Patron's desktop. The field name is **PCommPrefDelivery** and allows 20 characters.

Email Address comprises two boxes. The first, a text box, is for the name part of the Patron's email address (the part before the @ sign).   The field name for this part is **PCommEmailAddr** and allows 50 characters. The second box is a combo box that reveals a dropdown list of **local domain names** used by known Patron or Dept email addresses.   This list is stored in the **Local**

Domains (**tblLocalDomains**) Table of QuickDOC.MDB. To conserve space, each Domain Name in tblLocalDomains is identified by a number in the **LocalDomainNumber** field, and it is this number that actually resides in the Patron or Dept record. The actual name is stored in the **LocalDomainName** field of tblLocalDomains, and it is the list of names derived from this table that appears in the dropdown combo box. (None) is the default record and will appear if a Local Email Address is unknown. Because **Loansome Doc Patrons** are counted as local Patrons, this list can become fairly extensive if you have a large number of Loansome Doc users. The field name in the tblPComms record is **PCommLocalDomain** and is a number field reflecting the LocalDomainNumber in tblLocalDomains.

If the current domain name is the (None) record, you can either add a correct domain name from the dropdown list or, if the correct Local Domain isn't on the list, click the **Add Domain button** to add it (this button will read **Edit Domain** if a value other than (None) is in the Domain Name box).

Adding a Domain Name

To add a new domain name to tblLocalDomains (and to the dropdown combo box), click the Add Domain button when the current value is (None). You'll see the **Add Domain Name Input Box**:

Simply enter the new domain name in the input box and press Enter or click Ok. The new domain name will be added to the Local Domains Table and appear also in the current dropdown combo.

The command button will change to Edit Domain, which allows for editing of a domain name.

Any changes made to a Domain Name entry will of course be reflected in all Patrons or Departments with email addresses matching that domain. This is a fairly easy way to make those dreaded email address changes post-merger, from oldhospital.com to newhospital.com, so long as everyone is included in the change. If some will keep the old domain, then you'll either have to create a new domain name and individually assign each changing Patron or Dept to it or do the edit to the new name and then create the old name again and assign each non-changing Patron or Dept back to it. Not an enchanting proposition either way, but you can choose whichever method yields the fewest individual edits.

FTP Address is for any Patrons who participate in delivery of documents via FTP (or Ariel, for that matter, which is a variety of FTP). This may not apply to many Patrons at this point, but could change in the future. The field name is **PCommFTPAddr** and allows 50 characters.

URL: http// is for adding a web site for any Patron who wants this information known.. This does not have much application at this point, and is included for information only. The field name is **PCommHTTPAddr** and allows 250 characters.

Notes on the various values of this Tab can also be entered. The field name is **PCommNotes** and allows 100 characters. The PComms Table also has a **PCommTimeStamp** field to track **changes made by concurrent users** so that anyone trying to make a change to a record that was changed by another user during the time it was checked out to edit by the first user will be so notified and asked to first check the revised record before making a further alteration.

Patron Form – Charges Tab

The Charges Tab contains information about charges and payment options. Charge Profiles determine the default charge that is applied when an item is received and is filed with the BorrowItem record in the associated **tblBorrLocals** record's **BorrLocalCHRGAsPatron** field (there is also a matching **BorrLocalCHRGAsDept** field that will be used if the Invoice or Payment is ultimately made using a Department Invoice or Payment). While this default can always be changed in individual items, having the default charge be as accurate as possible can save a great deal of editing later on.

This information is stored in **tblPatronPrefPmts** in QuickDOC.MDB and is associated with the main Patrons Table with a matching ID Number (it matches the Patron Number). The matching field name is **PatronPrefPmtPatronRec**. There is also an unrelated unique key field, **PatronPrefPmtID**, which will allow for multiple Patron Preferred Payment records at some later date.

The **Primary Cost Center** field contains the main Cost Center used by this Department. Additional Cost Centers can be added using the **Add/Edit Cost Ctr button**, to bring up the **Add/Edit Cost Center Form**. Values other than the Primary value will appear in the Dropdown box.

Charge Profile Used is a combo box used to select Charge Profile to be assigned to this Patron. Charge Profiles for both Patrons and Departments are held in the **PDCharges** (**tblPDCharges**) Table in QuickDOC.MDB. In the Patron record, this value is stored in the Patrons Table, rather than in the PatronPrefPmts Table, in the field PatronPDChargesID. Charge Profiles must be assigned to each Patron (they will otherwise be assigned the Default) and are filed with the patron record. The **PatronPDChargesID** field can be up to 20 characters and must match a value in tblPDCharges.

To **edit or add a Local Charge Profile from the Patron Information form**, click the **Add/Edit Chg Profile button** to bring up the **Local Charge Profile Information** form.

Local Charge Profile Information Form

Local Charge Profiles can be named in any fashion that makes the most sense locally. In the case above, the name "5 Default" is used to suggest a $5.00 default charge for Patrons and Departments. The **Use this as the Default Local Charge Profile** checkbox is checked, which indicates that this profile will be applied to any newly created Patrons or Departments.

To change the default, just bring up another profile and check the checkbox on that one. Since there can only be one default at a time, checking the box on one profile effectively unchecks it for all the others.

If we were to change the Base Charge in the "20 Free" profile to $10.00, we would create a profile where the first 20 items are provided free to those with this profile, while any after that are charged at the chosen Default rates: $10 **Base Charge**; No in answer to **Use Cost As Base**; a

Fax Surcharge of $0.00; a **Rush Surcharge** of $0.00; an **Other Surcharge** of $0.00; a **Per Page Surcharge** of $0.00; and 20 in the **Free Items Before Charge Begins** field. QuickDOC computes the **Free Items Before Charge Begins** on the fly, adding the base charge only after the free items total has been reached (currently set on a Calendar Year basis, but a Fiscal Year setting will be forthcoming).

[The **Other Surcharge** field is used to apply **a standard surcharge on any request**, over and above the charge computed from the other columns. In reality, it is only used in cases where the **Use Cost As Base box** is checked and you want to add another standard charge to whatever it is that you paid for it. Otherwise, it's just as easy to put the extra charge in Base Charge, which is also applied against each item. Like the Rush and Fax surcharges, the Other Surcharge will not be applied on any item within the number of free items specified.]

 To **Add a Local Charge Profile**, first click the Clear Form button to clear out any old values, then begin typing in the new Charge Profile's values. Once a Charge Profile is created, it must then be assigned to individual Patrons or Departments before it takes effect on future items. In most cases, a profile can be applied to a number of Patrons and Departments, so that when you change your charges at any point, making the changes here will cause them to apply to any Patron with that Local Charge Profile in future activity.

Make sure the new **Local Charge Profile Name is unique** (if it isn't, you'll be notified), and then add the appropriate charges as they come. If you click Ok, then that Profile will be brought back to the Patron that caused the search (but you'll only notice this if you came from the BorrowItems Grid form. (I'm not sure what causes this, but it's clear that we should **restrict the names of all Charge Profiles** to **alphanumeric characters**. The QuickDOC.MDB database seems to choke when it's asked to assign charge profiles like **$11** or **12/15** to libraries, patrons or departments. Just to make life easier, try to use ONLY alphanumeric characters when assigning a Charge Profile Name.)

If you try to create a Local Charge Profile that matches one that already exists, you'll get this message in the **Local Charge Profile Information Form**:

The message box will notify you of the matching Charge Profile, and you'll be asked if you want to create a duplicate under the new name. In many cases, just knowing that the profile with the charges you need is already there will be enough, and you can click No. In some cases, though, it might be appropriate to create **multiple Local Charge Profiles** with different names, even though they currently match an existing profile. The fact that both names exist gives you the option to increase the charges in one, and not the other, at some point in the future.

For example, we currently charge in-house Patrons and **Loansome Doc Patrons** $5.00 an item, but we maintain two profiles, one called 5 Default and one called Loansome Doc (not shown

above) with the same values, so that we have the option to easily change one or another of the values in one step at some future time.

There may nevertheless be cases where a Patron's Local Charge Profile is applicable to that Patron or Department only. In those cases, you might just name that profile after the Patron or Dept, but don't forget to assign it in the Patron or Dept record, on the Charges Tab, as well.

You can also **edit or add a Local Charge Profile from the Setup Menu**:
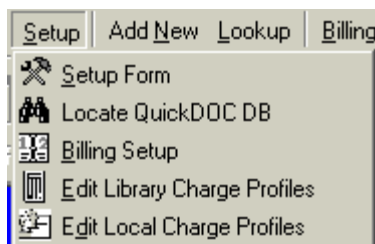
A Local Charge Profile Case Study

We are having trouble with local charges. We are part of a consortium. Consortium libraries do not charge for ILLs but we still charge our patrons $5 per article. On the other hand we borrow from libraries that charge $15 or $9 per article and we pass the cost directly on to our users without adding 5 dollars. We can not figure out how to do this using the QuickDOC profile. If we check Use Cost as Base Charge we get tons of zeros which we don't really want. We also charge $10 total for a Rush from the Consortium, but we don't do this for the libraries that have their own Rush charges. In that case we charge the patron what they charge us. Confused yet?

How can we wrestle this into a local charge profile?

Indeed, Charge Profiles can get complicated. It probably isn't possible to make it completely automatic with the current set of profile choices, but perhaps we can come close enough so that individual editing will only be needed in a smaller, recognizable set of cases.

First, assuming that most of your items will come from the Consortium (or other Free Lenders whenever possible), create a new Local Charge Profile (or just edit the built-in **Cost of Request profile**, if that's the one you're currently using with most Patrons and Departments). This profile will have the **Use Cost As Base Charge box** checked and the **Other Surcharge** amount set to 5.00.

This profile, assigned to all Patrons and Departments involved, will automatically assign a charge of 5.00 to any item received for that Patron. Perfect for Consortium and Free Libraries, but 5.00 too much for charging Libraries.

When you check in items from charging libraries, use the method of changing the Status from Outstanding to Received (rather than clicking the record selector and using the 'Mark Rec'd' button in either single or batch mode) and clicking Save Changes; this will keep the record visible (otherwise it goes right to the backfile). **At the time an item is marked Received, the Local Charges for that item are calculated**. If you press the F4 key and then click the + sign at the left of that item, you'll see the Local values, including the calculated **ChgAsPat** and **ChgAsDept** values. Edit both of these to subtract 5.00 (20.00 to 15 or 14.00 to 9) and then click anywhere outside that display and answer Yes to the Save Changes prompt. The item is now ready for Billing, using either Patron or Dept Bills.

Because it's fairly plain at check-in time which items will have Library charges, this system should be fairly easy to implement. (Of course, if you have to pay for a large number of requests then this click and edit procedure is a bit of work, but it can be quick enough, in steps:

1.   Click the downarrow next to the box with Status Outstanding

2. Click Received

3. Click Save Changes (the Date Received defaults to Today)

4. Press F4

5. Click the + sign

6. Click into ChgAsPat (the whole 20.00 entry will be highlighted)

7. Type 15

8. Click into ChgAsDept

9. Type 15

Then click anywhere outside the one-row display and confirm the changes.

On the Rush Surcharge:

There are actually two of these, one applied to the Library and one to the **Local Charge Profile**. If the Lending Library has a Rush Surcharge of 10.00 and a General Charge of 15.00, you could create a **Library Charge Profile** of **15Lib10Rush**, with 15.00 as Base Charge and 10.00 as the **Rush surcharge**. For that Library, when you change the Rush value on the Requests Outstanding Grid from No to Yes, the charge is always re-computed and will change to 25.00.

When you change the Rush value of the main item record, the **Local Rush** value also changes, so the value in the Local Display will also change to Yes. In most cases this is what you want, since a **Library Rush** is often a **Local Rush** as well.

In your case, you want to charge an extra 10.00 only when there isn't a Rush charge in the Library charge, and charge only their Rush charge when there is. I think the solution here is similar to the one above.

First edit our new Cost of Request Local Charge Profile and add a 10.00 value to the **Rush surcharge box**. This will cause an extra 10.00 to be added to the local charges with that profile when the Rush value is changed to Yes. In cases where the item is filled by a Consortium member (or other Free Library) the local Rush value will also be changed to yes, so it will be prepared to add another 10.00 to the local charge when that item is marked Received (any method, since no editing will be needed). As above, Consortium and Free requests will be automatically calculated properly.

For Libraries with their own Rush charges, however, this will be 10.00 too much. Because their Rush charge is subsumed in their Cost of Request, though, all we need to do is to turn off the local Rush value. And since we're already editing this item on check-in, because it's not a Free or Consortium item, we can also turn off the Local Rush value at the same time. In fact, you should do that first. Changing the Local Rush value from Yes to No will cause a recompute of the ChgAsPat and ChgAsDept values anyway, so you'll want to do this before editing them directly. So, for these items add an item 5a to the list above:

1. Click the downarrow next to the box with Status Outstanding

2. Click Received

3. Click Save Changes (the Date Received defaults to Today)

4. Press F4

5. Click the + sign

5a. Click the downarrow in the Rush box and change from Yes to No

6. Click into ChgAsPat (the whole 20.00 entry will be highlighted)

7. Type 15

8. Click into ChgAsDept

9.   Type 15

and confirm.

Preferred Payment Method is the method by which this Patron normally prefers to pay. It reveals a dropdown Combo Box with whatever values are in the **Payment Methods** (**tblPmtMethods**) Table of QuickDOC.MDB. Since this table provides payment methods used for Libraries as well as Patrons and Departments, some of the entries may not apply to Local Payments.
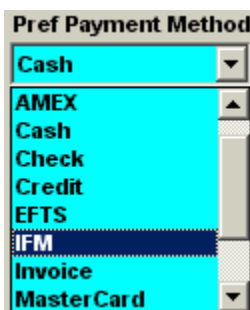
This value can also be left blank (you should see an empty value at the top of the dropdown list when it's first opened) as opposed to the usual (None) value, so long as the empty record is also present in tblPmtMethods (don't delete it by accident or design). The field name is **PatronPrefPmtMethod** and allows 30 characters.

Cost Center is Cost Center assigned to this Patron. It will be used in Invoicing and will appear on various Patron Lists. The field name is **PatronPrefPmtCostCenter** and allows 50 characters.

Acct Number will contain any local Account number for this Patron. The field name is **PatronPrefPmtAcctNumber** and allows 50 characters.

Name on Acct is only used if the name to bill is different from the Patron Name. In most cases it is left blank. The field name is **PatronPrefPmtNameOnAcct** and allows 50 characters.

Exp Date is typically used to record **Credit Card Expiration** notices but can be used for any other **Expiry Date**. This is an alphanumeric field, not a Date field, so any value may be entered. In non-Credit Card records it is usually left blank. The field name is **PatronPrefPmtCCExpDate** and allows 20 characters.

Notes on the various values of this Tab can also be entered. The field name is **PatronPrefPmtNotes** and allows 100 characters.

The **State/Province Sales Tax** box isn't implemented yet and will have no effect.

Patron Form – Misc Tab

This Tab is used to record miscellaneous data about the Patron. The **Patron Record Created Date** is also visible on the Misc Tab.

Loansome Doc UI is the UserID assigned to this Patron if the Patron is a Loansome Doc user. This value is imported from any Loansome Doc request received on DOCLINE. This is the **PatronLDXUI** field in the Patron record and allows 30 characters.

Patron is Active checkbox can be unchecked to render a Patron inactive while still keeping the record. This is a boolean field in the Patrons Table with the field name **PatronActive**.

Patron Status contains a value identifying the Patron's Status in your institution. It reveals a dropdown Combo Box with whatever values are in the **Status** (**tblStatus**) Table of QuickDOC.MDB. Default values are included at startup; others may be added using Access 2000 (an internal edit/add form will also be added in QuickDOC at a future date). Startup values include:

Status Code	Status Full Name
AHP	Allied Health Professional
DD	Dentist
FAC	Faculty
FELLOW	Fellow
FLAG	Flagged, Suspended
GRAD	Graduate
MD	Physician
NURS	Nursing Staff
OTH	Other
RES	Researcher
STAFF	Staff
UND	Undergraduate

If you add or edit any of the Status Code values, try to keep the same format: uppercase, up to 6 characters. The StatusFullName field can be up to 50 characters. The field name in the Patrons Table is **PatronStatusCode** and allows 6 characters.

Prefix contains a prefix value for the Patron, which can be used in a Salutation field of a form letter, etc. It reveals a dropdown Combo Box with whatever values are in the **Prefixes** (**tblPrefixes**) Table of QuickDOC.MDB. Default values are included at startup; others may be added using Access 2000 (an internal edit/add form will also be added in QuickDOC at a future date). Startup values include:

<u>Prefix Name</u>

Dr.

Mr.

Mrs.

Ms.

Sr.

If you add or edit any of the **PrefixName** values, try to keep the same format: mixed case, up to 10 characters. The field name in the Patrons Table is **PatronPrefix** and allows 10 characters.

Suffix contains a suffix value for the Patron, which can be used on Invoices, etc. It reveals a dropdown Combo Box with whatever values are in the **Suffixes** (**tblSuffixes**) Table of QuickDOC.MDB. Default values are included at startup; others may be added using Access 2000 (an internal edit/add form will also be added in QuickDOC at a future date). Startup values include:

<u>Suffix Name</u>

D.D.S.

D.M.D.

DNSC

L.P.N.

LiCSW

M.D.

M.L.S.

M.S.

M.S.L.S.

M.S.W.

Ph.D.

Pharm.D.

R.D.

R.N.

R.Ph.

R.R.T.

If you add or edit any of the **SuffixName** values, try to keep the same format: mixed case, up to 10 characters. The field name in the Patrons Table is **PatronSuffix** and allows 10 characters.

Notes on the various values of this Tab can also be entered. The field name is **PatronNotes** and allows 70 characters. The Patrons Table also has a **PatronModDate** field to track **changes made by concurrent users** so that anyone trying to make a change to a record that was changed by another user during the time it was checked out to edit by the first user will be so notified and asked to first check the revised record before making a further alteration. A

PatronCreateDate field holds the date the Patron Record was created and displays here on the Misc Tab, although it can't be edited.

Add Patrons

The Add Patrons form is the same as the Edit Patrons form. Clicking the **Clear/Reset This Record Button** on the Patron Information General Tab sets all values back to their defaults for an empty record and prepares for the creation of a new record. The values on the form are the same as if you had arrived here by clicking the Add Record button on the Patrons List.

New Patrons are added automatically from QDPortal Imports if the Patron Field doesn't contain the current Patron Number in brackets at the end of the field.

If you were to type in a new Patron Name, above, instead of using the Patrons List, that new patron record would be added during the course of importing this item from QDPortal saved records. A note that the patron has been added can be printed at the end of the session, but it is usually better not to print the report when you have many new Patron records. In that case just answer No to the Print questions and look at the file later in Notepad.

If there are only one or two patrons added during the session, then it's easy enough to print the report itself rather than to open it in Notepad.

To open the file, for editing and printing in Notepad, use Windows Explorer to find the file **PatronNt.txt** on the machine that saved the item. Double-click the file's icon and it will open in either Notepad or WordPad.
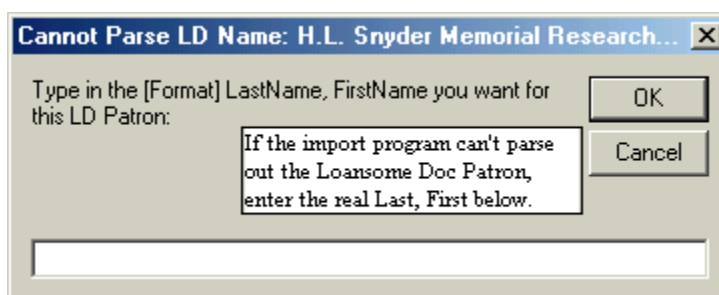
```
PatronNt.txt - Notepad
File  Edit  Search  Help

Monday, March 18, 2002          Rpt of Patrons Created in QDPortal Borrow Import
[Notes instances where more than one possible match was found, etc.]

Created new Patron record for Request Number: 1033223.
Patron on Request Line: Plummer, Al
Patron created here: Plummer, Al

A total of 2 Patron records were close matches for Request No. 1543583 Patron.
Patron on the Request Line: Yelick, P
Patron used here: Yelick, P

Created new Patron record for Request Number: 1928466.
Patron on Request Line: Smith, D
Patron created here: Smith, D

Created new Patron record for Request Number: 1969861.
Patron on Request Line: Prince, Nicole
Patron created here: Prince, Nicole

Created new Patron record for Request Number: 2053000.
Patron on Request Line: Canyurek
```

In most cases the Patron will be correct and you can delete these lines before printing this file.

If there's any chance that the wrong patron might have been chosen, you'll get a note that there was more than one possibility.

Once you've scanned this file and deleted those that seem to have created the correct patron, you can print those that are left (a considerably shorter file) to have on hand as you edit the Patron file.

Use the file to double-check new entries in the Patron Information File. (Note: this file will be located under the QuickDOC.MDB folder in folder \QDBorrow.)

Loansome Doc Patrons

Loansome Doc Patrons are added in much the same way as regular Patrons. Since the Loansome Doc Patron comes in without a [Patron Number] in ALL cases, but will include a **Loansome Doc Patron UserID** field, we can use that field to look up the Patron by LDX UI in the same way we assign items to regular Patrons by using the Patron Number found in brackets at the end of the DOCLINE Patron name field.

In cases where that UserID isn't yet in the file, a new record will also be made. Since Loansome Doc Patrons can type in their names any way they please, we can't always be sure what the format may be, especially when the **LDX Patron isn't an actual person**. Consider the case of the H.L. Snyder Memorial Research Foundation, located in Winfield, KS. When QuickDOC tries to parse out the name of this Loansome Doc Patron it's not going to do very well. Consequently, if it finds that it can't easily parse out a Loansome Doc Patron name, it will display an Input Box and leave the decision up to you:

```
Cannot Parse LD Name: H.L. Snyder Memorial Research...    X

Type in the [Format] LastName, FirstName you want for      OK
this LD Patron:
                                                          Cancel
```

If the import program can't parse out the Loansome Doc Patron, enter the real Last, First below.

To achieve the best result in this kind of situation, first envision how you want the result to be displayed and sorted. In most reports and bills, the final format will be First Middle Last, Suffix (if

any); sorting is always by Last Name. With that in mind, we want bills or reports to go to H.L Snyder Memorial Research Foundation, and we would prefer to have this "patron" sort under Snyder. To achieve that result enter:

Snyder Memorial Research Foundation, H.L.

in the input box. QuickDOC will look for the comma and treat everything before it as the Last name. It will treat everything after the comma as a First Name. This should produce the desired result.

In cases where the desired result is something other than what QuickDOC gives you, just edit the field on the Patron Information Form, keeping in mind the formats for reports and bills, as well as sorting. Since any activity for this Loansome Doc patron in the future will be assigned to the patron record through the UserID match, it won't matter what the actual name field says, and your choice of Last Name, First Name will be used in all future activity.

Departments

Records for Departments are held in the QuickDOC.MDB database primarily in the **tblDepts** Table, with associated records in **tblDComms**, **tblPDCharges**, **tblDeptPrefPmts**,and **tblPDAddrs** Lists of Department records are available in a column on all Borrow Grids, as well as through the Depts List.

The Depts List

Displaying Departments

Records for Department are primarily accessed through the **Depts List** (listed under "**Lookup**" on the **Menu Bar** as well as Add New). The Depts List also pops up in other places, such as when you're searching by Department in the Local Billing Grid, so that the Department can be chosen from the list.
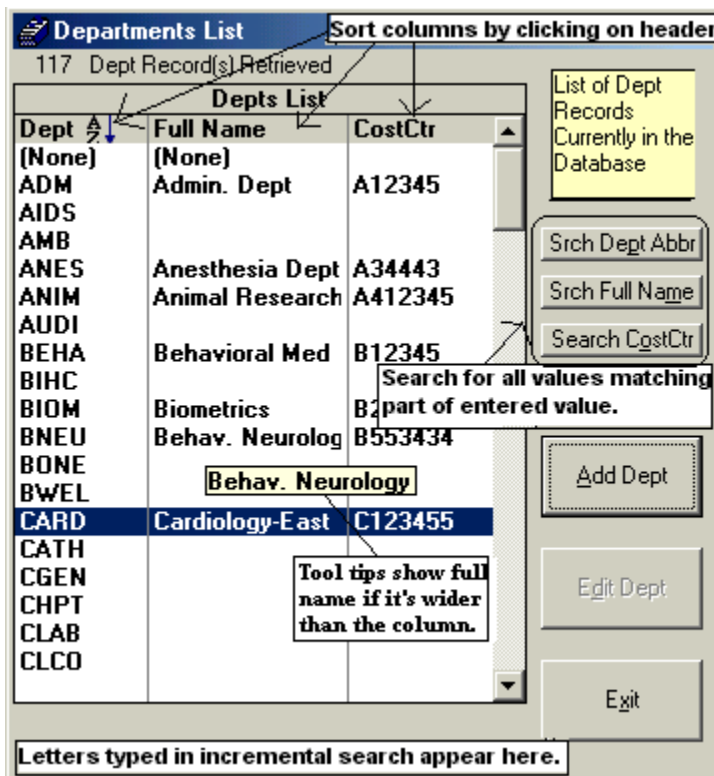
The list shows the Departments in your file alphabetically **by Dept Abbreviation**, which is the default sort order. Start typing the first few letters of the Abbreviation to jump ahead on the list, or use either the Down Arrow key or the Page Down key or the scroll bar at the right of the list to navigate further. (the **None Record**, by the way, is a place saver for No Department, and can be used in records where the Department name is unimportant, or when you want to delete a Department record while the Department you want to delete still has backfile activity in the database. The horizontal scroll bar at the bottom will expose the Cost Center column of the list if you drag it to the right. If you hold the cursor over any entry that is wider than the column width, a tool tip will appear with the full name visible.

As an item is selected (either by clicking on that line or by pressing Enter after moving down the list until the Department you want is highlighted), the **Edit Dept Button** is enabled (to switch from Edit Dept to Add Dept, click '**Clear Choice**'; the List will then be set to the topmost entry and the **Add Dept Button** will be enabled).

Searching for a Department

You can search the Depts List for specific matching entries by clicking on one of the search buttons. You can search the Dept Abbreviation column, the Dept Full Name column, and the Cost Center column. When you click the appropriate button, an input box will pop up. Enter any amount of characters you want matched and the list will then display only those records where that matching group of characters appears anywhere in the field.

To choose or edit a Department, click on the line that contains the entry you want: the '**Edit Dept' Button** will be enabled and that Department will be your current choice.

To **reset the Depts List** after a search to its full number of entries, click once on any item in the list to highlight it, and then either click the Clear button or click the header at the top of the Last column to start the sort on that column.

Sorting the Depts List

You can sort the Abbreviation, Full Name or Cost Center columns in ascending or descending order by clicking on the header at the top of the column.

Deleting Departments

Click the Edit Dept button to bring up the complete Department Information Form, and then click the **Delete Dept button** on the lower right of the General Tab.

Editing Departments

Click the Edit Dept button to bring up the **Department Information Form**. .   Double-clicking a line is the equivalent of selecting it and clicking the Edit Dept Button, and will also open the Department Information Form.

Department Information Form

The Department Information Form consists of five tabbed forms, located by clicking on the Tabs at the top of the form or by pressing Enter (or the Down Arrow) in the last control on the previous form, except on the Misc Tab, which is the last Tab visible. Pressing an Up Arrow from the topmost control of any form except the General Tab will move back to the previous Tab.

Department Information Form – General Tab

The General Tab presents general Department information, along with a snapshot of values set on other Tabs, including Local Address information; phone, fax and email data; Cost Center and Local Charge Profile.

The **Dept Abbr** field is the abbreviated name for this Department. There are sixteen characters available but, in general, shorter is better, because these also take up space in the Patron Name field on DOCLINE, where space is limited (40 characters). The **Dept Full Name** field is full Department Name and will be printed on most reports, etc. There are 50 characters available for this field.   The **Dept Mail Stop** field is for local mailing address, usually a **Room Number** or **PO Box**.

The **Home Dept** checkbox indicates that this record is the Department record for the Library, itself. It will cause the **Cost Center Charges Report** to exclude records with this Department value when composing that report.

 The remainder of this Tab shows current values from other Tabs (to permit one-stop lookup of common values; if you want to make a change to one or more of these values, move to the Tab specified) plus various command buttons for performing certain functions or accessing the Local Addresses form.

Transfer Department Activity

This is a quick way to **Merge Dept Records**. To transfer activity from one Department record to another, use the following steps:

1. Compare the old Department record to the new, adding any unique data from the old record to the new record on the appropriate Tab.

2. Edit the old record, changing the Dept Abbr field to match the new code and pressing Enter.

3. A message box will appear (as illustrated here for a transfer from Department LIBR to Department MED LIBRARY):
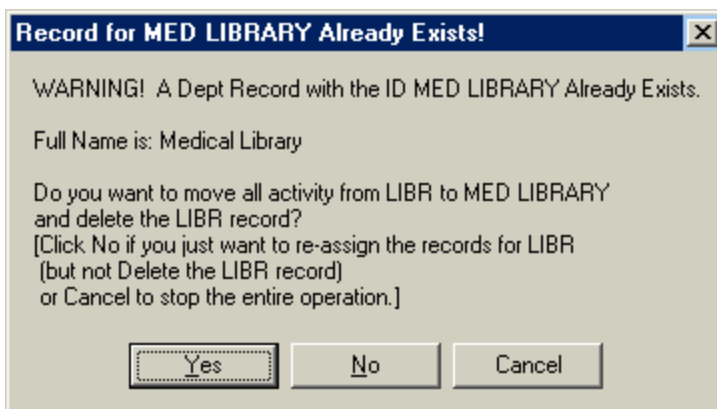
4. Click **Yes** if you want to move all activity in the database now assigned to LIBR to the MED LIBRARY record and delete the LIBR record.

5. Click **No** if you want to move all activity in the database now assigned to LIBR to the MED LIBRARY record but keep the LIBR record for future use.

6. Click **Cancel** to back out of the entire deal.

If you choose either 4 or 5, above, all the activity assigned to LIBR in any table within QuickDOC.MDB will be assigned to MED LIBRARY. This is a quick way to **Merge Department Records**.
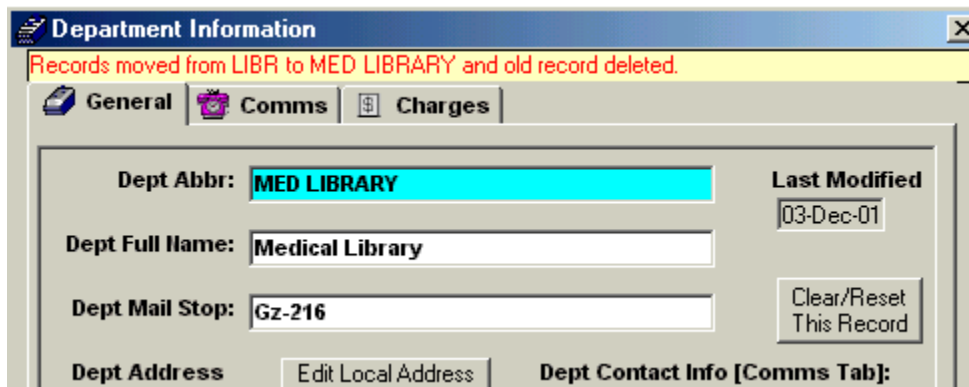
Transfer Department Activity to (None)

This is a method for **removing a Department entirely** and replacing any references to that Department in any of the QuickDOC.MDB tables with a reference to the **(None)** record. Steps are the same a merging, above, except that you should replace the original Dept Abbreviation with **(NONE)**. **Include the parentheses**; it will map to the lowercase version in the database entries.

Editing Departments From a Borrow Grid

When you come to the Department Information form by clicking the **To Depts button** on a Borrow Grid, you can make Dept Abbr changes, along with changes to any other fields in the Department record. When you make changes to the first field, however, that change must be cascaded through many other **associated tables** in QuickDOC.MDB. And when this cascading occurs while a Grid is displaying data, the Grid must be closed, the changes made (if any), and the Grid re-fetched and re-displayed. Since this may take some time, you'll see a message displayed while the Edit form remains visible:
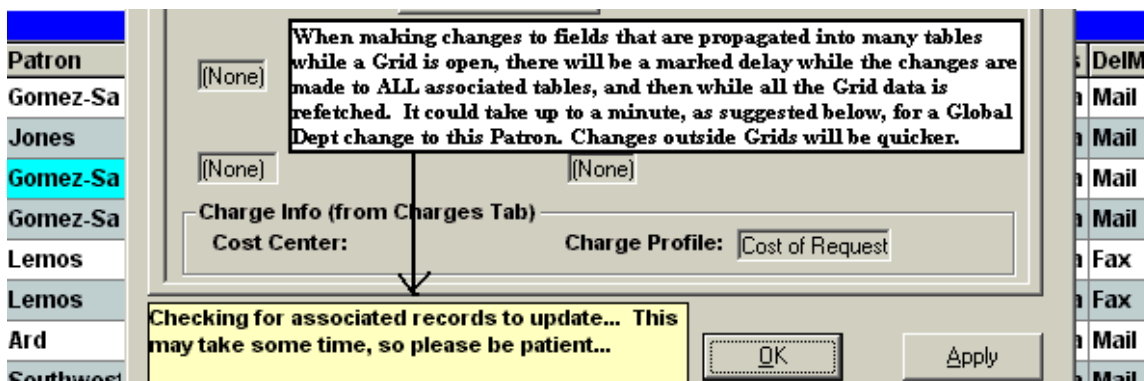
Since the wait can seem interminable while you're itching to get on with more changes, it makes sense to make any extensive changes to the Abbr field using the Depts List rather than the To Depts button on a Borrow Grid. But if you do make changes from the Grid, just be patient: the hourglass really will go away, eventually.

Clear/Reset Dept Record

Clicking the **Clear/Reset This Record Button** on the Department Information General Tab sets all values back to their defaults for an empty record and prepares for the creation of a new record. The values on the form are the same as if you had arrived here by clicking the Add Record button on the Depts List.

Local Addresses Form

The Local Addresses form is available from either the Patron Information form or the Department Information form by clicking the **Edit Local Address button**. Because addresses for Patrons and Departments are often identical, it makes sense to save this information once and assign it to individual Patrons or Departments rather than repeat it for each Patron or Department record.

This information is stored in **tblPDAddr** in QuickDOC.MDB and can be added to or edited by clicking the Edit Local Address button on the General Tab of either the Patron or Department Information forms.

Each **local address record** is given a unique record number in the **PDAddr Table** (the record number for **Institution Name (Address)**: Beth Israel Deaconess; and **Street1 (Address)**: 330 Brookline Ave.; is 2, in the sample below), and that record number (field **PDAddrID** in the PDAddr Table) is then assigned, if selected, to Patron and Department records when choosing the Local Address from the combo box (it's held in the **PatronAddrID** or **DeptAddrID** field of the appropriate table).

Anytime an address is needed for a Patron or Department, a lookup is made in tblPDAddr for the values in the record number of the appropriate AddrID field. The **Local Address Information** Form looks like this:

239.

Institution Name: This will be the General Institution in most cases but may also be an alias or internal moniker. It may be a completely different **institution for Loansome Doc Patrons**. It may also be blank, which may signify no local institution or the default local institution or just a missing value. You can see that the potential for duplicates here is fairly strong. The **MergeAddr button** will be useful to bring these duplicate (or redundant) addresses together. The field name is **PDAddrInstName** and allows 60 characters.

Adding a Local Dept Address

To add a new Local Address, first clear any current information by clicking the **Clear Choice button**, then add the necessary information and click either **Apply** (to add the new record and prepare to add another one) or **Ok** (to add the new record and exit).

Deleting a Local Dept Address

To delete a Local Address, click on it on the list, to move the values into the edit boxes, and then click **Delete Addr**. If the address hasn't been assigned to any Patron or Department, then the delete will be performed. If it is assigned to any Patron or Department, you'll get a message box:

Reassign any Patron or Dept records and try deleting again.

Automatic Capitalization

In most cases, when you are entering information into a new field (no previous data value), QuickDOC will try to capitalize entries based on a rule. Usually it's the first letter capitalized for each word, but the Help box that displays when the field is entered will usually let you know what kind of capitalization or formatting will be applied to any entries in that field.

Whenever (as above) the help box says something like "**Normal Caps assigned at initial Data Entry**" it means that QuickDOC will try to assign **automatic capitalization** based on the initial letters of words typed into that field. In the Institution Name field above, if you were creating the record, you could type "beth israel deaconess medical center" into the Institution box and, after you pressed Enter or Tab or clicked on another box, the entry would re-assemble itself and print out in the box as "Beth Israel Deaconess Medical Center," with the first letters of each word in **uppercase**, which happens to be as it should be.

But what if you wanted an institution named "BIDMC Medical Center?" If you type "bidmc medical center" into the Institution box and press Enter, you'll see "Bidmc Medical Center" after pressing Enter, which is close but not exactly what you wanted to enter. Unfortunately, even if you type "BIDMC Medical Center" in most of these fields, it will first re-set to **lowercase** characters and then apply the capitalization to the first letters, with a result exactly like the first.

If you're worried about the capitalization that might be applied, enter the value in its proper format and press Enter. Any format/capitalization changes will be applied and displayed immediately. If they are not to your liking, press the UpArrow key or Shift-Tab or just click back into the field you're not satisfied with and re-type the correct field values, just as you want them to be displayed. In the case above, manually change the "idmc" in the field to "IDMC" and press Enter. Once the field has an actual value, entries are no longer vetted for capitalization and are assumed to be edits.

The general rule is that, for **initial entries into empty fields**, QuickDOC tries to add the proper **capitalization**, so that you don't need to think about Shift Keys while entering information. But if this should result in a bad capitalization format (like Bidmc or Nih), just register the change (by pressing Enter or Tab or clicking on another box) and then click back (or press Shift-Tab) into the box where the change needs to be made to correct the format (change idmc to IDMC or ih to IH), and then Enter (or Tab or anything to exit that box) so that the change can be registered. (Box should now read BIDMC Medical Center or NIH or whatever.)

Street1 is the first line street value of the address. **DON'T** use the **Mail Stop** value (usually Room Number or local PO Box) since this is held in individual Patron or Department records. The field name is **PDAddrStreet1** and allows 60 characters.

Street2 is the second line street value of the address. **DON'T** use the **Mail Stop** value (usually Room Number or local PO Box) since this is held in individual Patron or Department records. The field name is **PDAddrStreet2** and allows 60 characters.

City is the city of the address. The field name is **PDAddrCity** and allows 60 characters.

State/Province is the State or Province of this Address Record. It's selected from the dropdown list of StateProvs. To be eligible for entry in the State/Prov field of any QuickDOC Table, the entry must already exist in **tblStateProvs**, the State/Provs Table in QuickDOC.MDB. If your entry isn't in the dropdown box, first edit (or add to) the StateProvs Table and then start up QuickDOC again; the new values should be in the dropdown box. The field name is **PDAddrStateProv** and allows 6 characters.

Postal Code/Zip is the Postal Code of the address. The field name is **PDAddrPostalCode** and allows 20 characters.
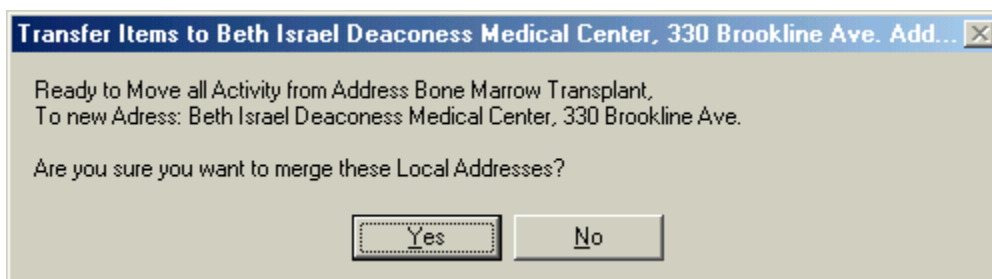
Notes on the address record can also be entered. The field name is **PDNote** and allows 50 characters.

Unique records in the PDAddr Table are identified by the combination of the Institution, Street1 and Street2 fields. Because the matching value might be in either Street1 or Street2 for a specified Institution value, both are searched when looking for duplicates. Nevertheless it will be common to see duplicate records, especially when one or another of these three values have been left blank. It is therefore expected that the Merge Addr button will be used, from time to time, to reconcile these near duplicates.

Merge Address Records

This is a quick way to **Merge Duplicate Address Records**. Any Patrons or Departments using the old record number will be switched to the new. Use the following steps:

1. Compare the old Local Address record to the new, adding any unique data from the old record to the new record.

2. Bring up the old record by clicking on it in the **Local Address List**, and click the **Merge Addr button**.

3. You'll then be instructed to choose (again from the Local Address List) the record you want to underline transfer activity **to**.

4. When you click the row for the new address record, a message box will appear so that you can confirm your choice:

5. Click **Yes** if you want to move all Patrons or Departments now assigned to the old address (Bone Marrow Transplant, in this case) to the new address (Beth Israel Deaconess).

6. Click **No** to back out of the entire deal.

7. If you click Yes, all Patron or Department records with the old Local Address ID will be assigned the new Local Address ID number. You'll next be asked if you want to delete the old record:
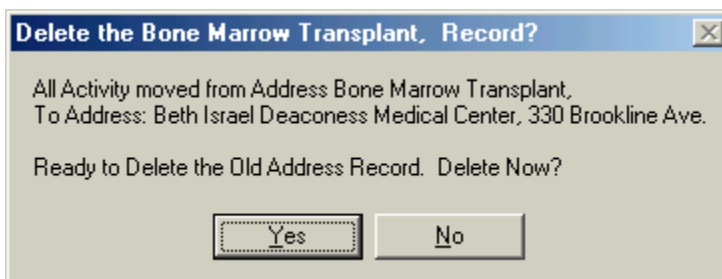
8. Click **Yes** to delete the old record (the usual choice) or No if you want to keep it around for some reason.

Department Information Form – Comms Tab

The Comms Tab has local communications information. Some of this information may have been imported from the old DOS QuickDOC FULLDEPT file, if it was available.

This information is stored in **tblDComms** in QuickDOC.MDB and is associated with the main Depts Table with a matching ID Number (it matches the Dept Abbr). The field name is **DCommID** and allows 16 characters.

Area Code (Voice) is telephone Area Code. The field name is **DCommAreaVoice** and allows 10 characters.

Voice Number is rest of the Voice number, including any extension. The field name is **DCommVoiceNumber** and allows 20 characters.

Area Code (Fax) is fax Area Code. The field name is **DCommAreaFax** and allows 10 characters.

Fax Number is rest of the fax number, including any extension. The field name is **DCommFaxNumber** and allows 20 characters.

Email Address comprises two boxes. The first, a text box, is for the name part of the Department's email address (the part before the @ sign).   The field name for this part is **DCommEmailAddr** and allows 50 characters. The second box is a combo box that reveals a dropdown list of **local domain names** used by known Patron or Department email addresses. This list is stored in the **Local Domains** (**tblLocalDomains**) Table of QuickDOC.MDB. To conserve space, each Domain Name in tblLocalDomains is identified by a number in the **LocalDomainNumber** field, and it is this number that actually resides in the Patron or Department record. The actual name is stored in the **LocalDomainName** field of tblLocalDomains, and it is the list of names derived from this table that appears in the dropdown

combo box. (None) is the default record and will appear if a Local Email Address is unknown. The field name in the tblDComms record is **DCommLocalDomain** and is a number field reflecting the LocalDomainNumber in tblLocalDomains.

If the current domain name is the (None) record, you can either add a correct domain name from the dropdown list or, if the correct Local Domain isn't on the list, click the **Add Domain button** to add it (this button will read **Edit Domain** if a value other than (None) is in the Domain Name box).

Adding a Domain Name

To add a new domain name to tblLocalDomains (and to the dropdown combo box), click the Add Domain button when the current value is (None). You'll see the **Add Domain Name Input Box**:

Simply enter the new domain name in the input box and press Enter or click Ok. The new domain name will be added to the Local Domains Table and appear also in the current dropdown combo.

The command button will change to Edit Domain, which allows for editing of a domain name.

Any changes made to a Domain Name entry will of course be reflected in all Patrons or Departments with email addresses matching that domain. This is a fairly easy way to make those dreaded email address changes post-merger, from oldhospital.com to newhospital.com, so long as everyone is included in the change. If some will keep the old domain, then you'll either have to create a new domain name and individually assign each changing Patron or Department to it or do the edit to the new name and then create the old name again and assign each non-changing Patron or Department back to it. Not an enchanting proposition either way, but you can choose whichever method yields the fewest individual edits.

Contact Person is the name of the Department Contact. The field name is **DCommContact** and allows 50 characters.

FTP Address is for any Department that participates in delivery of documents via FTP (or Ariel, for that matter, which is a variety of FTP). This may not apply to many Departments at this point, but could change in the future. The field name is **DCommFTPAddr** and allows 50 characters.

URL: http// is for adding a web site for any Department that may support this method of communication. The field name is **DCommHTTPAddr** and allows 250 characters.

Notes on the various values of this Tab can also be entered. The field name is **DCommNotes** and allows 100 characters. The DComms Table also has a **DCommTimeStamp** field to track **changes made by concurrent users** so that anyone trying to make a change to a record that was changed by another user during the time it was checked out to edit by the first user will be so notified and asked to first check the revised record before making a further alteration.

Department Form – Charges Tab

The Charges Tab contains information about charges and payment options. Charge Profiles determine the default charge that is applied when an item is received and is filed with the BorrowItem record in the associated **tblBorrLocals** record's **BorrLocalCHRGAsDept** field (there is also a matching **BorrLocalCHRGAsPatron** field that will be used if the Invoice or Payment is ultimately made using a Patron Invoice or Payment). While this default can always be changed in individual items, having the default charge be as accurate as possible can save a great deal of editing later on.

This information is stored in **tblDeptPrefPmts** in QuickDOC.MDB and is associated with the main Depts Table with a matching ID (it matches the Dept Abbr). The matching field name is **DeptPrefPmtDeptRec**. There is also an unrelated unique key field, **DeptPrefPmtID**, which will allow for multiple Department Preferred Payment records at some later date. This ID, which identifies this record in the **DeptPrefPmts** (**tblDeptPrefPmts**) Table of QuickDOC.MDB, is visible in a recessed box at the upper left of the Charges Tab. It is 57 in the case shown above.

The **Primary Cost Center** field contains the main Cost Center used by this Department. Additional Cost Centers can be added using the **Add/Edit Cost Ctr button**, to bring up the **Add/Edit Cost Center Form**. Values other than the Primary value will appear in the Dropdown box.

Charge Profile Used is a combo box used to select Charge Profile to be assigned to this Department. Charge Profiles for both Patrons and Departments are held in the **PDCharges** (**tblPDCharges**) Table in QuickDOC.MDB. In the Department record, this value is stored in the Depts Table, rather than in the DeptPrefPmts Table, in the field DeptChargeProfile. Charge Profiles must be assigned to each Department (they will otherwise be assigned the Default) and are filed with the Department record. The **DeptChargeProfile** field can be up to 20 characters and must match a value in tblPDCharges.

To **edit or add a Local Charge Profile from the Department Information form**, click the **Add/Edit Chg Profile button** to bring up the **Local Charge Profile Information** form.

Local Charge Profile Information Form

Local Charge Profiles can be named in any fashion that makes the most sense locally. In the case above, the name "5 Default" is used to suggest a $5.00 default charge for Patrons and Departments. The **Use this as the Default Local Charge Profile** checkbox is checked, which indicates that this profile will be applied to any newly created Patrons or Departments.

To change the default, just bring up another profile and check the checkbox on that one. Since there can only be one default at a time, checking the box on one profile effectively unchecks it for all the others.

If we were to change the Base Charge in the "20 Free" profile to $10.00, we would create a profile where the first 20 items are provided free to those with this profile, while any after that are charged at the chosen Default rates: $10 **Base Charge**; No in answer to **Use Cost As Base**; a **Fax Surcharge** of $0.00; a **Rush Surcharge** of $0.00; an **Other Surcharge** (which is added to each item) of $0.00; a **Per Page Surcharge** of $0.00; and 20 in the **Free Items Before Charge**

Begins field. QuickDOC computes the **Free Items Before Charge Begins** on the fly, adding the base charge only after the free items total has been reached (currently set on a Calendar Year basis, but a Fiscal Year setting will be forthcoming).

To **Add a Local Charge Profile**, first click the Clear Form button to clear out any old values, then begin typing in the new Charge Profile's values. Once a Charge Profile is created, it must then be assigned to individual Patrons or Departments before it takes effect on future items. In most cases, a profile can be applied to a number of Patrons and Departments, so that when you change your charges at any point, making the changes here will cause them to apply to any Department with that Local Charge Profile in future activity.

Make sure the new **Local Charge Profile Name is unique** (if it isn't, you'll be notified), and then add the appropriate charges as they come. If you click Ok, then that Profile will be brought back to the Dept that caused the search (but you'll only notice this if you came from the BorrowItems Grid form). (I'm not sure what causes this, but it's clear that we should **restrict the names of all Charge Profiles** to **alphanumeric characters**. The QuickDOC.MDB database seems to choke when it's asked to assign charge profiles like **$11** or **12/15** to libraries, patrons or departments. Just to make life easier, <u>try to use ONLY alphanumeric characters</u> when assigning a Charge Profile Name.)

If you try to create a Local Charge Profile that matches one that already exists, you'll get this message in the Local Charge Profile Inf Form:

The message box will notify you of the matching Charge Profile, and you'll be asked if you want to create a duplicate under the new name. In many cases, just knowing that the profile with the charges you need is already there will be enough, and you can click No. In some cases, though, it might be appropriate to create a new Local Charge Profile with a new name, even though it currently matches an existing profile. The fact that both names exist gives you the option to increase the charges in one, and not the other, at some point in the future.

There may nevertheless be cases where a Department's Local Charge Profile is applicable to that Department only. In those cases, you might just name that profile after the Department, but don't forget to assign it in the Department record, on the Charges Tab, as well.

You can also **edit or add a Local Charge Profile from the Setup Menu**:
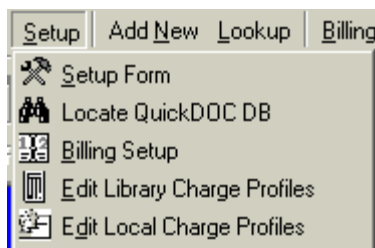
Local Dept Charge Profiles used for automatic calculation of charges

The Local Charge Profiles assigned to Departments will calculate the estimated charge in a Dept/Cost Center Bill when the item is marked as Received. See the discussion of Local Charge Profiles under Patron Information Form, Charges Tab, for a case study involving Free and charging Libraries, Rush items, etc.

Preferred Payment Method is the method by which this Department normally prefers to pay. It reveals a dropdown Combo Box with whatever values are in the **Payment Methods** (**tblPmtMethods**) Table of QuickDOC.MDB. Since this table provides payment methods used for Libraries as well as Patrons and Departments, some of the entries may not apply to Local Payments.
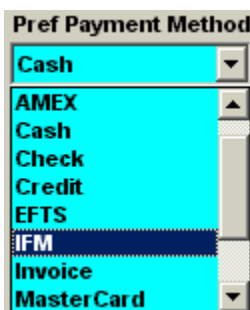
This value can also be left blank (you should see an empty value at the top of the dropdown list when it's first opened) as opposed to the usual (None) value, so long as the empty record is also present in tblPmtMethods (don't delete it by accident or design). The field name is **DeptPrefPmtMethod** and allows 30 characters.

Cost Center is Cost Center assigned to this Department. It will be used in Invoicing and will appear on various Department Lists. The field name is **DeptPrefPmtCostCenter** and allows 50 characters.

Acct Number will contain any local Account number for this Department. The field name is **DeptPrefPmtAcctNumber** and allows 50 characters.

Name on Acct is only used if the name to bill is different from the Full Dept Name. In most cases it is left blank. The field name is **DeptPrefPmtNameOnAcct** and allows 50 characters.

Exp Date is typically used to record **Credit Card Expiration** notices but can be used for any other **Expiry Date**. This is an alphanumeric field, not a Date field, so any value may be entered. In non-Credit Card records it is usually left blank. The field name is **DeptPrefPmtCCExpDate** and allows 20 characters.
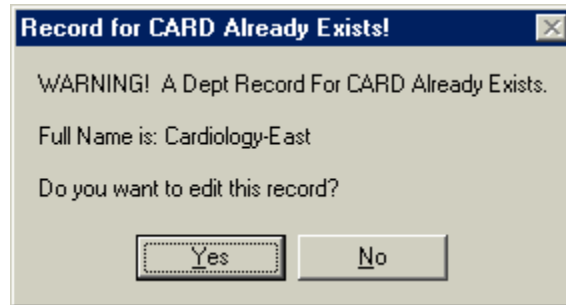
Notes on the various values of this Tab can also be entered. The field name is **DeptPrefPmtNotes** and allows 100 characters.

The **State/Province Sales Tax** box isn't implemented yet and will have no effect.

Add Departments

The Add Departments form is the same as the Edit Departments form. Clicking the **Clear/Reset This Record Button** on the Department Information General Tab sets all values back to their defaults for an empty record and prepares for the creation of a new record. The values on the form are the same as if you had arrived here by clicking the Add Record button on the Depts List.

If you try to add a Dept Abbr that already exists, you'll be warned that this is the case and asked whether you want to edit that record instead.

Record for CARD Already Exists!

WARNING! A Dept Record For CARD Already Exists.

Full Name is: Cardiology-East

Do you want to edit this record?

[Yes]   [No]

If you click Yes you'll be editing the Cardiology – East record, rather than adding a new one.

Cost Centers

Records for **Local Cost Centers** (Patron/Dept) are held in the QuickDOC.MDB database primarily in the **tblCostCenters** Table, with associated tables tracking which cost centers are assigned to Patrons or Departments in **tblDepCostCenters**and **tblPatCostCenters**. Access to the Add/Edit Cost Centers Form is available from the Charges Tab on both the Patron and Department Information forms. Here's the Charges Tab on the Patron Information Form:

The **Primary Cost Center** will appear in the box, and any other Cost Centers available for this Patron are in the dropdown box, so that changes to Primary Cost Center can easily be made.

If the desired Cost Center isn't on the list, click the **Add/Edit Cost Ctr button** to bring up the **Add/Edit Cost Center Form**.

Add/Edit Cost Center Form

Displaying All Cost Centers

All current Cost Center values are available in this form. Records can be added and edited here from either the Patron or Department Information forms.

250.

The list shows all Cost Centers in the file, with the Cost Center from the Patron/Dept being edited in the Edit Box. To add a new Cost Center, click Clear and type in the new value.

To choose a new value from the list of existing Cost Centers. Just click the value on the list until it replaces the 1884 now in the box.

To edit the current value, make changes in the edit box.

Global Cost Center Changes

When you make a change, you will also be given a chance to propagate this change to all other iterations of the current value (1884, in this case):

If you want to change all the 1884s in the database to 18784, click Yes. If you just want to add the new one, click No. To bail out entirely, click Cancel.

Mapping One Cost Center Value to Another

If you want to map a current Cost Center to another existing Cost Center, just edit the current value to match that exiting Cost Center value. When you click Ok to save, you'll be asked if you want to map the old value to the new.
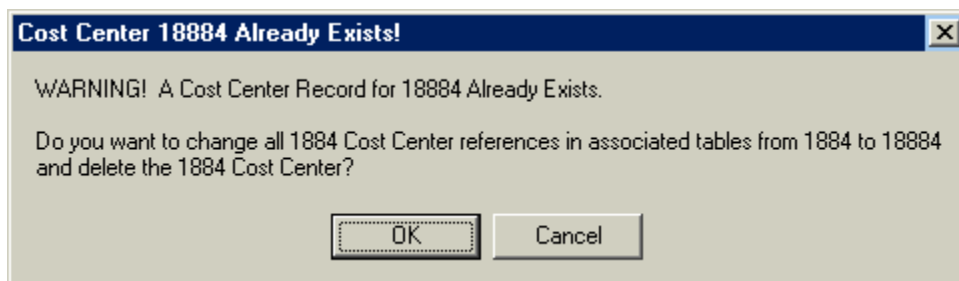
When you click Ok or Back. Whatever value is currently in the Cost Center Edit box will be brought back with you.

## Assigning new Patron Cost Center to Backfile Records

If this Cost Center is a new Primary Cost Center, you'll be asked if you want to apply this new Cost Center to ALL Borrow Items for that Patron:
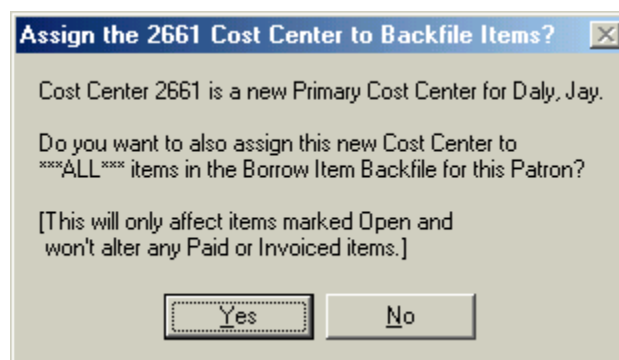
If you click Yes, then all Patron Borrow records with the Local Status of Open will be assigned this new Cost Center value. You might want to be careful about this if you have other, specialized Cost Centers assigned to this Patron (Grant numbers, etc.).

## Assigning new Dept Cost Center to All Patrons in Dept

If you change the Primary Cost Center for a Department, you will be given the chance to extend this Cost Center change to all members of that Department:
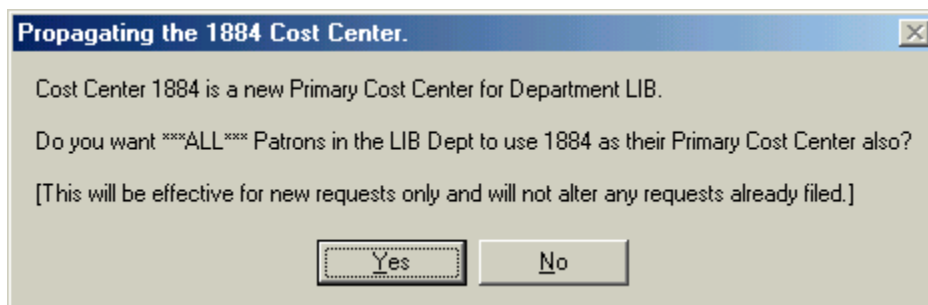
Answering Yes here will propagate this new Cost Center to all Patrons in the Department. It will make changes in the Patron records only, and won't affect any items already in the Backfile or Outstanding file; in other words, it will be used as the default Cost Center only for items requested after this date.

Disassociating a Cost Center from a Patron or Dept

To disassociate a Cost Center from a Patron or Department first move it from its place in the dropdown list to the Primary Cost Center box. Answer No to any prompts for Global Changes, etc. **Right-click** the **Add/Edit Cost Ctr** button to prompt for the removal of this Cost Center from those associated with this Patron or Department:
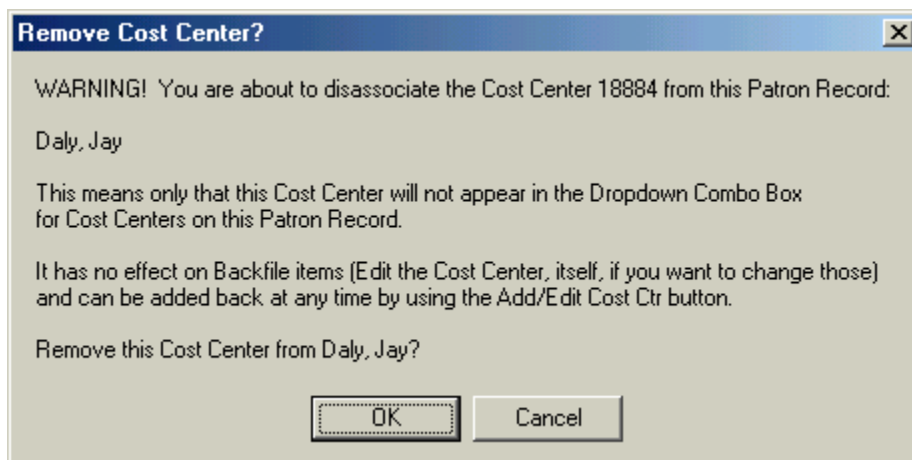
This will **Remove the Cost Center** from the list of those associated with this Patron or Department. It won't affect any earlier assignments of this Cost Center to individual items, but it will result in the Cost Center appearing to be blank when the item is viewed by clicking the + sign in a regular Borrow Grid, since the contents of the Cost Center field are vetted on the fly each time the subgrid is opened, and only values associated with the Patron on that line are allowed.

In most cases, it's probably less confusing to simply leave it, unused, in the dopdown list of Cost Centers for that Patron or Department.

Cost Centers in the Borrow Items Grids

You can access the Cost Center information for each item in the Local Billing sub-Grid by clicking on the + sign to the left of the record. Since this will toggle between the Citation Records (tblBorrBibs) and the **Local Billing view** (tblBorrLocals), you may have to click a few times before the proper view comes up. The Cost Center assigned to each item can be changed here with any value currently associated with that Patron/Dept; these values will populate the dropdown box when the Grid item is opened.

You can also edit the **ChgAsPatron** and **ChgAsDept fields** at the same time.

Cost Centers in the Local Billing Grid

Cost Centers appear at the top level of the Local Billing Grid, with dropdown boxes populated with all associated Cost Centers to make any changes necessary.

| ▼	RQNO	Patron	PatChrg	Dept	CostCenter	Item	Local	Rush	Local	Recd	Paid On	Loc
▣ ✛	5988555	Aubrecht ▼	$4.00	RADIO	1884 ▼	1999 Transplant ii	Pickup	No	Open	2/26/2002		
☐ ✛	6550447	Aubrecht ▼	$4.00	RADIO		2000 Clinical J pa	Pickup	No	PaidP	4/12/2002	8/5/2002	[Inv
☐ ✛	2812876	Barqawi- ▼	$4.00	NEPH	1884 2661	1997 Risk adjustn	Pickup	No	InvDer	1/25/2002		[Inv
☐ ✛	5419498	Barqawi- ▼	$4.00	NEPH	8115	1993 Crit reviews	Pickup	No	InvDer	1/25/2002		[Inv

All Local Billing Items - By Request

While you're allowed to change the Cost Center even for items that have already been Invoiced or Paid, it won't change the value of the Invoice or Payment already created. To make a true change, first delete the Payment on the Payments Form (if the item was Paid) and then delete the Invoice, either from the Payments Table or by changing the Local Status back to Open. Then run the Invoice again with the new Cost Center value for that item.

Local Billing

Billing Options and Forms

Local Billing Grid Tool Bar Button

Choose the **Local Billing Button** on the Tool Bar to get to the Local Billing Grid.
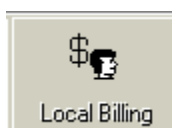

This Grid shows Local Billing-related information, including Paid Date and the Invoice Number related to each item. When you select the **Local Billing Grid**, an additional criterion on Charge <> 0.00 is applied, so that the **Local Billing Grid won't include FREE items**. It is a list of items with either PatChrg > 0.00 or DepChrg > 0.00 that have been received. No items where both the Patron and Dept Charges are Free will be included; these must be edited in the Locals Sub-Grid of the Borrow Items Backfile Grid, if they are incorrectly set to 0.00. Better yet, properly setting the **Local Charge Profile** for this Patron will automatically compute and display the proper charge when the item is Received.

The Local Billing Grid also includes two special **Ribbon Search Buttons:**

This ribbon button will appear when the default search is a Patron Search (which is most of the time). After the Search Dept button is clicked, though, the ribbon button will change to:
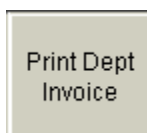
For more information on creating Invoices from within the Local Billing Grid, see the Local Billing Grid section, below.

Set Local Preferences for Patron/Dept Billing

Before printing Invoices for the first time (and whenever you need to make changes to any of the Invoice boilerplate information thereafter), check under the **Setup** Menu for **Set Local Preferences**, which contains values for items normally printed on an Invoice and other choices for Local Billing.
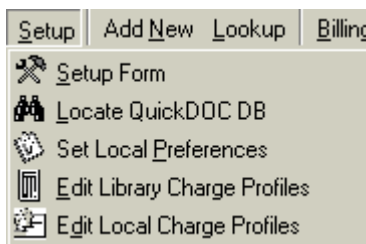

See the **Local Preferences** section for more information.

Local Charge Profiles used for automatic calculation of charges

The Local Charge Profiles assigned to Patrons and Departments will calculate the estimated charge, for both a Patron Bill and Dept/Cost Center Bill, when the item is marked as Received. See the discussion of Local Charge Profiles under Patron Information Form, Charges Tab, for more information.

Print Local Invoices

All Print Invoices choices are on the **Local Billing Menu** on the Menu Bar.
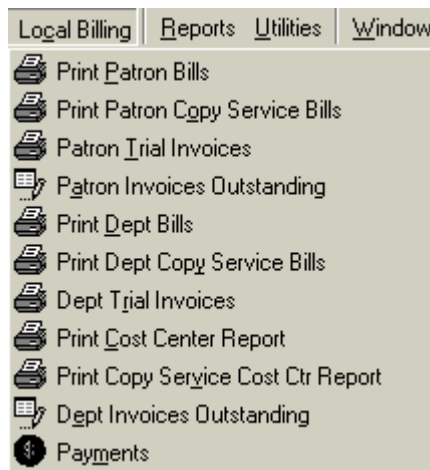
The Invoices choice is also available under the **Reports** Menu Bar item, **Borrowed Items**. Use this method to print a regular monthly Invoice run. Invoices can be printed to **Print Preview**, in order to get an idea as to what will be generated, or to any **Printer** that shows up in your list of Printers. **Local Invoices can also be printed with up to 5 copies** on each run.

Local Invoice Numbers are composed of:

For **Patron Invoices**:   P+the Patron Number + a unique number from 0001 to 9999

For **Dept Invoices**:   D+the first 5 characters of the Dept Abbr + unique number 0001 to 9999

For **Cost Ctr Invoices**: C+the first 5 characters of the Cost Ctr + unique number 0001 to 9999

For **Copy Service Invoices**: Same format as the applicable type above, with a **CS** at the end.

The last Invoice Number used is kept in the **tblLocals** Table in QuickDOC.MDB, under the tag **LastDepInv** for Depts/Cost Centers, or **LastPatInv** for Patron Invoices.

How Items are Selected to be included in an Invoice:

1.   The item must have a Patron or Dept **Local Charge** other than 0.00

2.   **Local Status** must read **Open**.

3.   The item should have been received and checked in within the dates selected.

In the Local Billing Grid below, only the last two items, with the red check marks, would appear on an invoice run, either the automatic batch run or a single Invoice printed from the 'Create Invoice' button:

	RQNO	Patron		PatChrg	Dept	CostCenter	Item	Local	Rush	Local	Recd	Paid On	Loc
	5498017	Adams	▼	$4.00	PUL M	6100	2001 Ann hemato	Pickup	No	PaidD	1/31/2002	8/4/2002	[Inv
	6484387	Adams	▼	$4.00	PUL M	Pulm001	2002 J healthcare	Pickup	Yes	PaidD	4/10/2002	8/4/2002	[Inv
	5498016	Albano	▼	$0.80	NC	6100	2000 Pediatric he	Pickup	No	PaidP	1/31/2002	8/4/2002	[Inv
	5752428	Albano	▼	$0.30	7540	7887	1999 Cancer prac	Pickup	No	PaidP	1/31/2002	8/4/2002	[Inv
	5925491	Amer	▼	$4.00	INF DIS	8110	1952 Am J public	Pickup	No	Open	2/19/2002		
	5934945	Amer	▼	$5.00	INF DIS	8110	1963 Br medical	Pickup	No	Open	2/20/2002		

All Local Billing Items - By Request

How to set up Monthly Local Invoice Runs

Setting up a **procedure for printing Local Invoices** for Patrons, Departments or Cost Centers will depend on what kind of invoices are generated at your site (and the **frequency of Invoicing** can be something other than monthly, of course, but monthly is a good choice for demonstration purposes). In general, your setup will depend on certain variables:

1. Do you print Copy Service Invoices separately from general ILL Invoices?

2. Which of the three kinds of Invoices (Patron, Department or Cost Center) comprises the largest category of an Invoice run each month?

3. Are there any Patrons, Departments or Cost Centers that you want to be exempt from invoices? (These you can either mark as Paid beforehand, or change the Local Charge Profile to Free if, indeed, there should be no charge, or you can just let the invoices be printed and then immediately mark them paid, although this defeats the purpose a bit. Patrons with Deposit Accounts will have their items paid as received and those items won't be eligible for Invoices.)

Your schedule for printing should move from the **least-used** category to the **most used**, with **Copy Service Invoices always printed first** in each category, then the ILL Invoices in that category (assuming you want them to be separate).

The one exception to this progression is if you have **Cost Centers assigned only to those items that you want to bill using the Cost Center Report**. In that case, you can run that report first, which will print out the bills by Cost Center and mark all those items as Invoiced, so that they will be removed from contention when any later invoice is generated.

Let's take an example where most of the Invoices will be Patron Invoices, but there are also two Departments that you want to bill separately, as well as one Grant Number that you've added to the Cost Center list.

If that **Grant Number** is the only Cost Center attached to any activity during the month, then you can start out by printing a Cost Center Report for that month, which would process all of those items into the one Cost Center Report, and also prevent their being included in Patron or Department Invoices. If there are other Cost Centers attached to items, however, this option won't work, since those items would be harvested into Cost Center Reports as well, when we really want them in Patron or Department Invoices. If the Grant is limited to one Department, or even one Patron, you can also rely on the individual Department or Patron Invoice, since those invoices will be subtotaled by Cost Center as well.

[In certain situations, however, where billing to that Grant Number occurs among a number of Patrons and Departments, it might make sense to run the Cost Center Report first, generating reports for all Cost Centers, and then use the Local Billing Grid to delete the Reports/Invoices for all Cost Centers except the Grant Number cost center you need. This will leave you with the **one Cost Center Report/Invoice**, while all the other items will have been reset to Open and will be available for individual Patron or Department Invoices. See the section on "**Running Cost Center Reports as Reports Only**," below, for a discussion of this method.]

Next **print individual invoices for the two Departments** by running separate Invoices for each from the **Local Billing Grid**. You can also choose in each case to **run the Copy Service Invoice first**, if that is your usual method. This will process out any activity that you want billed by Department.

All that will be left, at this point, are those items you want billed by Patron. Consequently, you can run the **batch Print Patron Bills** choice from the **Local Billing Menu** to process all the rest of the Local Billing items for the month in question. Choose the **Print Patron Copy Service Invoices** first, if you want them separate.

After a while, you'll probably know, from month to month, exactly which Departments will need Invoices, and can simply proceed first to the Local Billing Grid to run those individual department invoices, and then from there to the Print Patron Invoices from the Menu Bar to get the rest. Or you can **print a complete set of Patron Trial Invoices** (or just check the Print Preview for a Patron Invoice print, which will show the same thing), and use the trial set to separate out the Departments to be Invoiced and to plan a strategy for that month based on the above criteria.

Methods for Printing QuickDOC Local Invoices

QuickDOC includes dropdown combo boxes on all the **Local Invoices** forms for choosing the **Printer to print to** (as well as the **default Print Preview**) and the **number of copies to print**. In most cases this arrangement will be the easiest to use and most convenient.

In some situations, however, access to the full **Windows Print Menu** might be necessary in order to set some specific printer value just for the Invoice run to be printed. One such option might be the ability of some printers to **collate reports** with **more than one copy** to be printed. Typically, **collation** means that any report set to print more than one copy will first print the first copy all the way through, then the second copy all the way through, etc. In most cases, for reports, this is what you want.

In some cases, though, and the printing of **multiple copies of Invoices** is the obvious example, collation is **not** what you want. Multiple copies of Invoices should stay together, so they can be mailed together.
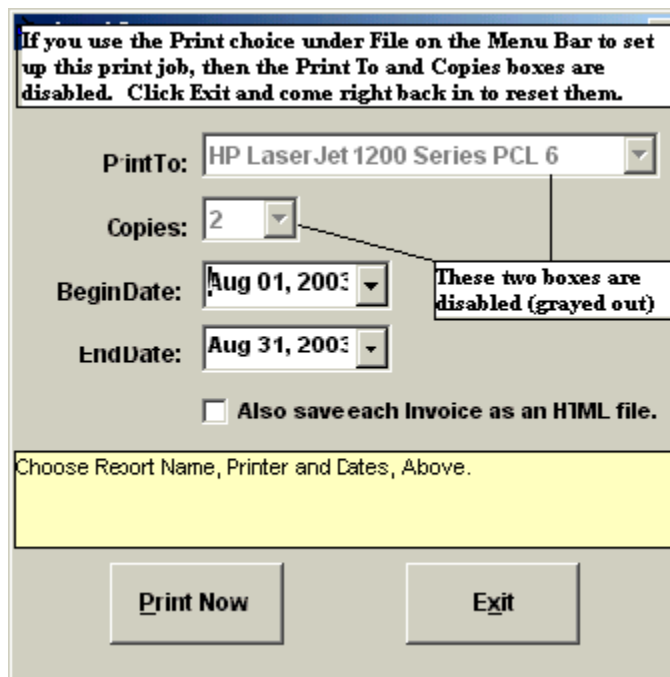
In order to provide this option, QuickDOC will activate the **Print choice on the File Menu** when any of the Invoice choices are selected under **Local Billing** on the **Menu Bar**. If you need to set some specific printer setting, use this method rather than the boxes provided on the QuickDOC Invoice forms. Here's the File Menu that shows when a Local Billing form is displayed:
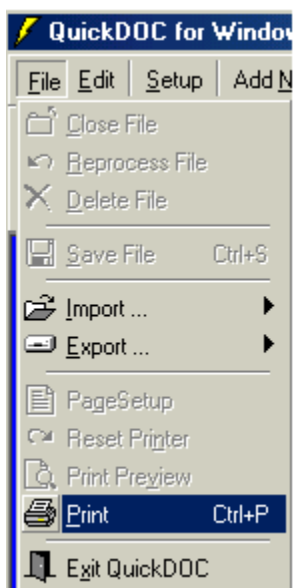
Click File on the Menu Bar, then Print, to get the **Print Menu**. On the Print Menu, select the **Printer Name** you want to use, the **number of copies** you want to print (any number of copies you might have selected on the Invoice form will be ignored), and any other **Printer Properties** (such as collate, for example) that you want to apply to this print job.

Your Print Menu may look slightly different, depending upon the version of Windows running on your machine and the printer's capabilities. Once the selections are made, click **Ok** to return to the Invoice Form.

You'll notice that the **Print To** and **Copies** boxes now show your selections made using the Windows Print Menu, but that they are now **disabled** (grayed out). This alerts you to the current

settings and reminds you that the changes were made on the Windows Print Form, not this one. The other values, Begin Date, End Date, etc., are still available and can be changed at any time.

If you want to **stop using the Windows Print Menu settings**, first go back to the Print Menu, using the **File, Print** method. Undo any changes you've made just for this batch Invoice run, so that the **Windows Printer defaults** are returned to their normal settings. Click **Ok** to save the Windows settings, then **Exit** to quit the QuickDOC Local Invoices form. When you come back in the Print To and Copies boxes will again be enabled and ready for use.

It's probably a good idea also to get in the habit of revisiting the Windows Print Menu after each Invoice batch is run and before exiting the Local Invoices Form, to avoid leaving the printer at settings that will be an unpleasant surprise when some future report is printed.

Print Patron Bills

The **Print Patron Bills** choice prints the batch of Invoices using the **CHRGAsPatron** charge (the header is **PatChrg** on the Local Billing Grid) for the period selected. The Patron Invoice format is as follows:

All **Invoices are subtotaled by Cost Center**, if more than one Cost Center is indicated.

During each Patron Invoice Print, the **Local Status** of each item will be set to **InvPat** , the **CHRGAsPatron** value will be copied to the **LocalCHRG** field, the **Invoice Number** will be copied to the **LocalInvoice** field, and all information about each invoice will be added as a **Patron Invoice Record** in **tblPatInvoices** in QuickDOC.MDB.

Once the Invoice is printed for an item, the **Invoice Number is available on the Local Billing Grid, in the Local Invoice column**, format **[Inv=P160 0069]**. It can be searched under just "**Containing**" 0069 in most cases.

Patron Invoices and Window Envelopes

There's a **Move Invoice Address Up (1, 2 lines)** choice on the Billing Prefs Tab of the Local Preferences form that can be used if your Invoice Address doesn't quite fit the window of your window envelopes. You can move that address section up either 1 or two lines toward the top (you can push it down by adding additional lines to your return address, although this is not usually necessary. Moving the address up 1 line is accomplished by removing the blank line between the Invoice Dates and the Invoice Number line, as illustrated:

Move Up values are ignored for HTML Invoices, since these are delivered by email and won't need a window envelope.

Moving the address up **2 lines** is accomplished by eliminating the blank line between the Invoice Dates and the line with the Invoice Number in the middle, and also moving the **Include copy of Invoice or Inv No. with payment** line from just above the **Bill To address** to a line just below it and just above the line that separates the header from the column headers of the Invoice.

A typical Patron/Dept Invoice with a 2 line move up will appear as follows, with both the removed lines indicated:

Dept Invoices are very similar to the Patron Invoice above.

Patron Invoice with Invoice Address Above Return Address

If you have checked the **Put Invoice Address above Return Addr** checkbox on the Local Preferences form, the Invoice Address will appear on top. This is useful for window envelopes where the window appears about halfway up rather than toward the lower left of the envelope. This address swap for Patron (and Department) Invoices will appear as follows:

Comment Lines on Patron Invoices

There's an **Add'l Comment entry on Invoices** option available on the Billing Prefs Tab of the Local Preferences form for entering a brief comment (up to 75 characters long) that will print at the bottom of the Patron (or Dept) Invoice.

Invoice comment lines appear at the end of Invoices, after the Totals line, with a horizontal line separating the comment from the Invoice section. Here's an example for a Patron Invoice:

				Include copy of Invoice or Inv No. with payment		
Item# Dept	Cost Ctr	ReqID	Item		Charge	Date Rec'd
1 LIBR		2127	2002 National network (Dallas, Tex.) Jan;26(3):11		$5.00	14-Feb-03
2 LIBR		2126	2002 Br J sports medicine. Jun;36(3):200-3; dis		$5.00	14-Feb-03
3 LIBR		2125	2002 J Medical Library Association Jul;90(3):310-6		$5.00	14-Feb-03
4 LIBR		2124	2002 National network (Dallas, Tex.) Jul;27(1):15		$5.00	14-Feb-03
5 LIBR		2123	2002 Insect molecular biology. Oct;11(5):467-75		$5.00	14-Feb-03
Total Items For Daly, Jay: 5				Total Charges:	$25.00	
		Contact the Medical Library at 28312 to see about setting up a Deposit Acct				

The comment will be printed at the center of the page, just under the horizontal line. The limit of 75 characters is set to ensure that there will be enough room for a cleanly centered line (the comment above is the full 75 characters long), no matter how many uppercase or other wide characters are used. If there is no Additional Comment Line, the horizontal line will not be printed.

Canadian Bilingual Format for Local Invoices

If you have checked the **Use Canadian Invoice format?** checkbox on the Local Preferences form, your Local (Patron/Dept/Cost Center) Invoices will have bilingual (English/French) labels in most cases. Item data will still be in English (unless it was entered in French under Add Borrow

or Add Lend), since it's been imported from DOCLINE, and address information will be as entered in the Patron/Dept/Cost Center record and on the Addresses Tab of the Local Preferences form, but bilingual labels will be displayed on the invoice printout wherever possible.

A typical Patron Invoice in Canadian (**Bilingual**) format appears as follows:

Even with these changes, if you're using bilingual labels, you should try to keep the entries for **Make Check Payable To**/**Prière de faire le chèque à l'ordre de** and **Terms**/**Conditions** as concise as possible, since space here is limited.

HTML Invoice option for Electronic Patron Billing

At the time Patron or Department Invoices are printed each month, you can opt to save a copy of each Invoice as an HTML file. These HTML versions of the **Patron**, **Department** or **Cost Center Invoice** can be forwarded as an email attachment to Patrons and Departments you wish to bill electronically. To save an HTML version of an Invoice run, check the **Also save each Invoice as an HTML file** checkbox on the Borrow Reports form after choosing the Invoice By Patron Report. Invoices printed, or reprinted, from the Local Billing Grid will also provide a prompt for this save.

If you know that you won't need HTML copies of Invoices, indicate this using the **Print HTML copies** choices on the **Billing Prefs Tab** of the **Local Preferences** form. These option buttons control whether or not HTML versions of Invoices are generated when a printed copy is made. Check **Never** if you never send these HTML Invoice; check **Ask** if you want to see a popup message box each time; and check **Always** if you want to have an HTML Invoice automatically generated without asking permission.

If you check **Never** on that form, you won't see the HTML checkbox on the Local Invoice Print form; if you check **Always**, it will appear already checked; if you check **Ask**, it will appear unchecked.

If this box is checked, a copy of each invoice will be saved in the **Export folder** that always exists just beneath the location of the QuickDOC.MDB database. All **Patron Invoice HTML files** will be in the format **PInv####** (where #### is the actual four-digit invoice number), e.g., PInv1234.

 Since these files aren't created during Print Preview, it will be necessary to print at least one copy of the invoice in order to have the file generated. Once the files are made, you can use the printouts to identify the files to send as email attachments. They will all be together in the Export folder:

These **HTML Invoice files will be deleted when an Invoice is deleted**, and also **when an Invoice is paid**, but it will be useful to clean these files out from time to time to prevent clutter. If you delete an HTML Invoice file that you later want to resend, you can **recreate it by running a Reprint of the original Invoice**.

HTML Invoices are quite similar to printed Invoices and will be displayed in whatever might be the default Browser of whoever clicks on the file icon. Displayed in Internet Explorer, the Patron Invoice looks as follows:

Unused copies won't hurt anything, but will require cleaning out that Export folder from time to time.

Bilingual HTML Local Patron Invoices

Bilingual HTML Invoices (**Canadian Format Local Invoices**) are even more constricted in space than the regular printed versions, since some of the fonts used in the HTML format take up more space than the typical printed format. Because HTML Invoices aren't mailed, though, the placement of the Address and Return Address isn't as critical as in a normal Invoice. The Canadian format HTML Patron Invoice appears as follows:

```
15-Sep-2003          Invoice No/No de facture: P890 0016                    Page 1

Make Check Payable To/Prière de faire le chèque à l'ordre de:
Agoos Medical Library, Library ILL Fund                Terms/Conditions: NET 30
Beth Israel Deaconess Medical Center                           Tél: 617.632-8480
Agoos Medical Library                            Fax/Télécopieur: 617.632-8316
One Deaconess Road                   Email/Courriel: dyoung3@bidmc.harvard.edu
Boston, MA 02215
                                     Our Cost Centre/Code budgétaire: 0108266


   Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

       Betsy ...own
       Beth Israel Deaconess Medical Center
       330 Brookline Ave.
       Boston, MA 02215

  The Canadian (Bilingual) HTML Invoice also
  has column headers a bit bunched, but no      Invoice Total/Montant total facturé: $5.00
  more then the regular bilingual invoice.
```

No.	Dept/Dép	Cost Ctr/Code budgétaire	ReqID/No de demande	Item/Référence	Chg/Frais	Date Rec'd/reçu
1	ADM	A12345	351627	1997 Anesthesiology. ():	$5.00	25-Jan-03

Total Items For/Total des requêtes pour A12345 : 1   Cost Ctr Chrg/Frais chargés au code budgétaire: $5.00

Total Items For/Total des requêtes pour Brown, Betsy: 1   Total Charges/Total des frais: $5.00

Print Patron Copy Service Bills

The **Print Patron Copy Service Bills** choice prints the batch of Invoices that include only Copy Service Items (and using the **CHRGAsPatron** charge) for the period selected. In order to see this choice on the dropdown menu under Local Billing on the Menu Bar, you must have checked the **Separate Copy Service Invoices?** checkbox on the **Billing Prefs Tab** of the **Local Preferences Form**. The **Patron Invoice (Copy Service)** format is as follows:

Invoice (Copy Service)
01-Jan-03 to 31-Jul-03

Copy Service Invoices all end in CS

16-Aug-2003   Invoice Number: P6 0001CS   Page 1

Make Check Payable To: Agoos Medical Library   Terms: NET 30

Beth Israel Deaconess Medical Center	Tel: 617.632-8480
Agoos Medical Library	Fax: 617.632-8316
One Deaconess Road	dyoung3@bidmc.harvard.edu
Boston, MA 02215	
	Our Cost Center: 0108266

Include copy of Invoice or Inv No. with payment

Jay Daly
LIBR

Invoice Total: $2.00

Item#	Dept	Cost Ctr	ReqID	Item	Charge	Date Rec'd
1	LIBR	Medical Library	COPY0307071	2003 J biological chemistry Jun 17;():21-31	$2.00	07-Jul-03

Total Items For Cost Center Medical Library : 1   Cost Ctr Chrg: $2.00

Total Items For Daly, Jay: 1   Total Charges: $2.00

The main differences between the Copy Service and regular Patron Invoice are in the Title (which includes the words **Copy Service**), the Invoice Number (which always ends in **CS**) and the fact that only copy service items (which usually begin with **COPY**) are included.

Canadian Bilingual Format for Local Patron Copy Service Invoices

If you have checked the **Use Canadian Invoice format?** checkbox on the Local Preferences form, your Local (Patron/Dept/Cost Center) Copy Service Invoices will have bilingual (English/French) labels in most cases. Item data will still be in English (unless it was entered in French under Add Borrow or Add Lend), since it's been imported from DOCLINE, and address information will be as entered in the Patron/Dept/Cost Center record and on the Addresses Tab of the Local Preferences form, but bilingual labels will be displayed on the invoice printout wherever possible:

Patron	Invoice/Facture (Copy Service/Service de copies)

Invoice/Facture (Copy Service/Service de copies)
01-Aug-03 to/au 31-Aug-03

20-Sep-2003   **Invoice No/No de facture: P1056 0001CS**   **Page 1**

Make Check Payable To/Prière de faire le chèque à l'ordre de:
Agoos Medical Library, Library ILL Fund   **Terms/Conditions: NET 30**

Beth Israel Deaconess Medical Center	Tél: 617.632-8480
Agoos Medical Library	Fax/Télécopieur: 617.632-8316
One Deaconess Road	dyoung3@bidmc.harvard.edu
Boston, MA 02215	

Our Cost Centre/Code budgétaire: 0108267

Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

Dr. ada
Beth Israel Deaconess Medical Center
GZ-216
330 Brookline Ave.
Boston, MA 02215

Invoice Total/Montant total facturé: $ 5.00

No.	Dept/Dép	Cost Ctr/Code budgétaire	ReqID/No de demande	Item/Référence	Chg/Frais	Date Rec'd/reçu
1	GAST		COPY0308061	1996 Eur J medicinal chemistry 31():1001-10	$5.00	06-Aug-03

Total Items For/Total des requêtes pour Berrada, Driss: 1   **Total Charges/Total des frais:**   **$5.00**

HTML Copy Service Invoices for Patrons are quite similar to regular HTML invoices (with the usual Copy Service additions) and are saved under the Invoice Number filename without the CS appended at the end.

Print Dept Bills

The **Print Dept Bills** choice prints the batch of Invoices using the **CHRGAsDept** value (the header is **DeptChrg** on the Local Billing Grid) for the period selected.   Unlike the Patron Bills choice, the Department Invoice form includes an additional **Use Charge stored with Patron Record Checkbox** that will allow the Invoice run to use the **CHRGAsPatron** value rather than the default CHRGAsDept value, so that individual Patrons within a Department can be charged according to a different charge schedule, when this is appropriate.

If you know that you won't need HTML copies of Department (or any other Local) Invoices, indicate this using the **Print HTML copies** choices on the **Billing Prefs Tab** of the **Local Preferences** form. These option buttons control whether or not HTML versions of Invoices are generated when a printed copy is made. Check **Never** if you never send these HTML Invoice; check **Ask** if you want to see a popup message box each time; and check **Always** if you want to have an HTML Invoice automatically generated without asking permission.

If you check **Never** on that form, you won't see the HTML checkbox on the Local Invoice Print form; if you check **Always**, it will appear already checked; if you check **Ask**, it will appear unchecked.

The **Department Invoice** is similar to the Patron Invoice, as illustrated below:

During each Department Invoice Print, the **Local Status** of each item will be set to **InvDep** , the **CHRGAsDept** value will be copied to the **LocalCHRG** field (unless the **CHRGAsPatron** checkbox has been checked), the **Invoice Number** will be copied to the **LocalInvoice** field, and all information about each invoice will be added as a **Department Invoice Record** in **tblDepInvoices** in QuickDOC.MDB.

Once the Invoice is printed for an item, the **Invoice Number is available on the Local Billing Grid, in the Local Invoice column**, the Department format (not shown above) is **[Inv=DHEMON 0029]**. It can be searched under just "**Containing**" 0029 in most cases.

Dept Invoices and Window Envelopes

There's a **Move Invoice Address Up (1, 2 lines)** choice on the Billing Prefs Tab of the Local Preferences form that can be used if your Invoice Address doesn't quite fit the window of your window envelopes. You can move that address section up either 1 or two lines toward the top (you can push it down by adding additional lines to your return address, although this is not usually necessary. Moving the address up 1 line is accomplished by removing the blank line between the Invoice Dates and the Invoice Number line, as illustrated (Dept and Patron Invoices use the same method):

Move Up values are ignored for HTML Invoices, since these are delivered by email and won't need a window envelope.

A typical Patron/Dept Invoice with a 2 line move up will appear as follows, with both the removed lines indicated:

Dept Invoices are very similar to the Patron Invoice pictured above.

Dept Invoice with Invoice Address Above Return Address

If you have checked the **Put Invoice Address above Return Addr** checkbox on the Local Preferences form, the Invoice Address will appear on top. This is useful for window envelopes where the window appears about halfway up rather than toward the lower left of the envelope. This address swap for Department (and Patron) Invoices will appear as follows:

Comment Lines on Dept Invoices

There's an **Add'l Comment entry on Invoices** option available on the Billing Prefs Tab of the Local Preferences form for entering a brief comment (up to 75 characters long) that will print at the bottom of the Department Invoice.

Invoice comment lines appear at the end of Invoices, after the Totals line, with a horizontal line separating the comment from the Invoice section. Here's an example for a Dept ADM Invoice:

The comment will be printed at the center of the page, just under the horizontal line. The limit of 75 characters is set to ensure that there will be enough room for a cleanly centered line (the comment above is the full 75 characters long), no matter how many uppercase or other wide characters are used. If there is no Additional Comment Line, the horizontal line will not be printed.

Canadian Bilingual Format for Department Invoices

If you have checked the **Use Canadian Invoice format?** checkbox on the Local Preferences form, your Department Invoices will have bilingual (English/French) labels in most cases. Item data will still be in English (unless it was entered in French under Add Borrow or Add Lend), since it's been imported from DOCLINE, and address information will be as entered in the Department

record and on the Addresses Tab of the Local Preferences form, but bilingual labels will be displayed on the invoice printout wherever possible.

A typical **Dept Invoice in Canadian (English/French) format** appears as follows:

HTML Invoice option for Department Billing

All **Department Invoice HTML files** will be in the format **DInv####** (where #### is the actual four-digit invoice number), e.g., DInv1234. The format follows that of the printed Invoice:

Some fields are truncated on the HTML version.

Bilingual HTML Department Invoices

Bilingual HTML Invoices (**Canadian Format Patron Invoices**) are even more constricted in space than the regular printed versions, since some of the fonts used in the HTML format take up more space than the typical printed format. Because HTML Invoices aren't mailed, though, the placement of the Address and Return Address isn't as critical as in a normal Invoice. The Canadian format HTML Department Invoice appears as follows:

```
16-Sep-2003          Invoice No/No de facture: DADM 0012              Page 1

Make Check Payable To/Prière de faire le chèque à l'ordre de:
Agoos Medical Library, Library ILL Fund                    Terms/Conditions: NET 30
Beth Israel Deaconess Medical Center                            Tél: 617.632-8480
Agoos Medical Library                                 Fax/Télécopieur: 617.632-8316
One Deaconess Road                              Email/Courriel: dyoung3@bidmc.harvard.edu
Boston, MA 02215
                                           Our Cost Centre/Code budgétaire: 0108266


   Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

      Admin. Dept [ADM]
      Beth Israel Deaconess Medical Center
      330 Brookline Ave.
      Boston, MA 02215
```

The Canadian (Bilingual) HTML Invoice also has column headers a bit bunched, but no more then the regular bilingual invoice.	**Invoice Total/Montant total facturé: $5.00**

No.	Patron/Usager	Cost Ctr/Code budgétaire	ReqID/No de demande	Item/Référence	Chg/Frais	Date Rec'd/reçu
1	Brown, Betsy	A12345	351627	1997 Anesthesiology. ():	$5.00	25-Jan-03

Total Items For/Total des requêtes pour A12345 : 1   Cost Ctr Chrg/Frais chargés au code budgétaire: $5.00

Total Items For/Total des requêtes pour ADM: 1   Total Charges/Total des frais: $5.00

Print Dept Copy Service Bills

The **Print Dept Copy Service Bills** choice prints the batch of Invoices that include only Copy Service Items (and using the **CHRGAsDept** charge) for the period selected. In order to see this choice on the dropdown menu under Local Billing on the Menu Bar, you must have checked the **Separate Copy Service Invoices?** checkbox on the **Billing Prefs Tab** of the **Local Preferences Form**. The **Dept Invoice (Copy Service)** format is as follows:

Invoice (Copy Service)
01-Jan-03 to 31-Jul-03

| Copy Service Invoices all end in CS |

16-Aug-2003   Invoice Number: DLIBR 0001CS   Page 1

Make Check Payable To: Agoos Medical Library   Terms: NET 30

Beth Israel Deaconess Medical Center   Tel: 617.632-8480
Agoos Medical Library   Fax: 617.632-8316
One Deaconess Road   dyoung3@bidmc.harvard.edu
Boston, MA 02215
                                                  Our Cost Center: 0108266

                                                  Include copy of Invoice or Inv No. with payment

Medical Library [LIBR]
Beth Israel Deaconess Medical Center
GZ-216
330 Brookline Ave.
Boston, MA 02215   Invoice Total: $2.00

Item# Patron	Cost Ctr	ReqID	Item	Charge	Date Rec'd
1 Daly, Jay	Medical Libr...	COPY0307071 2003 J biological chemistry Jun 17;():21-31	$2.00	07-Jul-03

Total Items For Cost Center Medical Library : 1   Cost Ctr Chrg: $2.00

The main differences between the Copy Service and regular Dept Invoice are in the Title (which includes the words **Copy Service**), the Invoice Number (which always ends in **CS**) and the fact that only copy service items (which usually begin with **COPY**) are included.

Canadian Bilingual Format for Department Copy Service Invoices

If you have checked the **Use Canadian Invoice format?** checkbox on the Local Preferences form, your Department Invoices will have bilingual (English/French) labels in most cases. Item data will still be in English (unless it was entered in French under Add Borrow or Add Lend), since it's been imported from DOCLINE, and address information will be as entered in the Department record and on the Addresses Tab of the Local Preferences form, but bilingual labels will be displayed on the invoice printout wherever possible.

A typical **Dept Invoice in Canadian (English/French) format** appears as follows:

Dept (Copy Service)

Invoice/Facture (Copy Service/Service de copies)
01-Aug-03 to/au 31-Aug-03

20-Sep-2003 **Invoice No/No de facture: DGAST 0001CS** **Page 1**

Make Check Payable To/Prière de faire le chèque à l'ordre de:
Agoos Medical Library, Library ILL Fund **Terms/Conditions: NET 30**

Beth Israel Deaconess Medical Center Tél: 617.632-8480
Agoos Medical Library Fax/Télécopieur: 617.632-8316
One Deaconess Road dyoung3@bidmc.harvard.edu
Boston, MA 02215

Our Cost Centre/Code budgétaire: 0108267

Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

Gastro - East [GAST]
Beth Israel Deaconess Medical Center
DA-501
330 Brookline Ave.
Boston, MA 02215

Invoice Total/Montant total facturé: $ 5.00

No.	Patron/Usager	Cost Ctr/Code budgétaire	ReqID/No de demande	Item/Référence	Chg/Frais	Date Rec'd/reçu
1	Bermuda, Driss		COPY0308061	1996 Eur J medicinal chemistry 31():1001-10	$5.00	06-Aug-03

Total Items For/Total des requêtes pour GAST: 1 **Total Charges/Total des frais:** **$5.00**

HTML Copy Service Invoices for Departments are quite similar to regular HTML invoices (with the usual Copy Service additions) and are saved under the Invoice Number filename without the CS appended at the end.

Invoice/Facture (Copy Service/Service de copies)

Dept Copy Service (Canadian format) HTML 01-Aug-03 to/au 31-Aug-03

20-Sep-2003 **Invoice No/No de facture: DGAST 0017CS** **Page 1**

Make Check Payable To/Prière de faire le chèque à l'ordre de:
Agoos Medical Library, Library ILL Fund

Terms/Conditions: NET 30

Beth Israel Deaconess Medical Center Tél: 617.632-8480
Agoos Medical Library Fax/Télécopieur: 617.632-8316
One Deaconess Road Email/Courriel: dyoung3@bidmc.harvard.edu
Boston, MA 02215

Our Cost Centre/Code budgétaire: 0108267

Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

Gastro - East [GAST]
Beth Israel Deaconess Medical Center
DA-501
330 Brookline Ave.
Boston, MA 02215

Invoice Total/Montant total facturé: $5.00

No.	Patron/Usager	Cost Ctr/Code budgétaire	ReqID/No de demande	Item/Référence	Chg/Frais	Date Rec'd/reçu
	Bermuda Dri		COPY0308...	1996 Eur J medicinal chemistry 31():1001-10	$5.00	06-Aug-03

Patron or Dept Trial Invoices

The **Patron Trial Invoices** and **Dept Trial Invoices** choices print exactly as the Invoice run will print, except that Invoice Numbers aren't assigned, and only one copy of each Invoice is printed. Use this instead of the Print Preview to generate actual invoices that can be used for proofreading and editing prior to running the actual invoices.

Print Cost Center Report

The **Cost Center Report** has a different format than either the Patron or Department Invoice, but **it also functions as an Invoice**, and will set the **Local Status to InvDep** and will file an Invoice record in **tblDepInvoices** in QuickDOC.MDB.

The **Print Cost Center Report** choice prints a batch of Individual Reports/Invoices, one for each Cost Center represented during the period in question, using the **CHRGAsDept** value for the period selected.   Like the Department Invoice form, the Cost Center Report form also includes an additional **Use Charge stored with Patron Record Checkbox** that will allow the Report run to use the **CHRGAsPatron** value rather than the default CHRGAsDept value, so that individual Patrons within a Cost Center can be charged according to a different charge schedule, when this is appropriate.

The **Cost Center Report format** is set to Landscape by default. When first displayed in Print Preview, the form may be displayed incorrectly, as below:

Use the **Print Preview Expand Page** button to expand to right margin to the right edge of the screen. If you click **Close** after clicking the **Expand Page** choice, you can then re-click the **Print Now** button to start the Print Preview Report again from the beginning in the expanded format.

The fully-expanded Print Preview, and the resulting printout, appear as follows:

During each Cost Center Report Print, the **Local Status** of each item will be set to **InvDep** , the **CHRGAsDept** value will be copied to the **LocalCHRG** field (unless the **CHRGAsPatron** checkbox has been checked), the **Invoice Number** will be copied to the **LocalInvoice** field, and all information about each invoice will be added as a **Department Invoice Record** in **tblDepInvoices** in QuickDOC.MDB.

Once the Invoice is printed for an item, the **Invoice Number is available on the Local Billing Grid, in the Local Invoice column**, the Cost Center format is **[Inv=C8107 0007]**. It can be searched under just "**Containing**" 0007 in most cases.

Comment Lines on Cost Center Invoices

There's an **Add'l Comment entry on Invoices** option available on the Billing Prefs Tab of the Local Preferences form for entering a brief comment (up to 75 characters long) that will print at the bottom of the   Cost Center Report/Invoice.

Invoice comment lines appear at the end of Invoices, after the Totals line, with a horizontal line separating the comment from the Invoice section. Here's an example for a Cost Center A12346 Invoice:

Canadian Bilingual Format for Cost Centre Invoice/Reports

If you have checked the **Use Canadian Invoice format?** checkbox on the Local Preferences form, your CostCentre Invoice/Reports will have bilingual (English/French) labels in most cases. Item data will still be in English (unless it was entered in French under Add Borrow or Add Lend), since it's been imported from DOCLINE, bilingual labels will be displayed on the invoice printout wherever possible.

A typical **Cost Ctr/Code budgétaire Rpt in Canadian (English/French) format** appears as follows:

HTML Invoice option for Cost Center Billing

All **Cost Center Report/Invoice HTML files** will be in the format **CInv####** (where #### is the actual four-digit invoice number), e.g., CInv1234. The format follows that of the printed Invoice/Report:

Some fields are truncated on the HTML version.

Bilingual HTML Cost Centre Invoices

Bilingual HTML Invoices (**Canadian Format Cost Centre Reports/Invoices**) are even more constricted in space than the regular printed versions, since some of the fonts used in the HTML format take up more space than the typical printed format. The Canadian format HTML Cost Centre Invoice appears as follows:

(01-Jan-03 to/au 31-Jan-03)

Cost Ctr/Code budgétaire (A12345) Rpt: CA1234 0016   20-Sep-2003

Agoos Medical Library   Our Cost Centre/Code budgétaire: 0108266

Invoice Total/Montant total facturé: $5.00

No.	Cost Ctr/Code budgétaire	Patron/Usager	Dept/Dép	MailStop/Destination	Chg/Frais	ReqID/No de demande	Item/Référence	Date Rec'd/reçu
1	A12345	Brown, Betsy (D	ADM		$5.00	351627	1997 Anest	25-Jan-03

Total Items For/Total des requêtes pour A12345: 1   Total Charges/Total des frais: $5.00

Print Copy Service Cost Center Report

The **Copy Service Cost Center Report** has a different format than either the Patron or Department Copy Service Invoice, but **it also functions as an Invoice for Copy Service Activity billed by Cost Center**, and will set the **Local Status to InvDep** and will file an Invoice record in **tblDepInvoices** in QuickDOC.MDB. In order to see this choice on the dropdown menu under Local Billing on the Menu Bar, you must have checked the **Separate Copy Service Invoices?** checkbox on the **Billing Prefs Tab** of the **Local Preferences Form**. The **Copy Service Cost Ctr Report** format is as follows:

Cost Center (Medical Library) Report #: CMEDIC 0001 CS   (01-Jan-03 to 31-Jul-03)   16-Aug-2003

Agoos Medical Library   (Copy Service)   Cost Center: 0108267

Item#	Cost Ctr	Patron	Dept	MailStop	Charge	ReqID	Item	Date Rec'd
1	Medical Libr...	Daly, Jay	MED		$2.00	COPY0307071	2003 J bio	07-Jul-03

Total Items For Medical Library: 1   Total Charges: $2.00

Copy Service Report/Invoice can have its own Cost Center, and will end with CS

The main differences between the Copy Service and regular Cost Center Report are in the line with the Library Name and Cost Center (which clearly notes, in parentheses, the words **Copy Service**), the Invoice Number (which always ends in **CS**) and the fact that only copy service items (which usually begin with **COPY**) are included.

Canadian Bilingual Format for Cost Centre Copy Service Invoices

If you have checked the **Use Canadian Invoice format?** checkbox on the Local Preferences form, your CostCentre Copy Service Invoices will have bilingual (English/French) labels in most cases. Item data will still be in English (unless it was entered in French under Add Borrow or Add Lend), since it's been imported from DOCLINE, bilingual labels will be displayed on the invoice printout wherever possible.

A typical **Cost Ctr/Code budgétaire (Copy Service) Invoice in Canadian (English/French) format** appears as follows:

```
Cost Centre (Copy Service) Report/Invoice (Canadian format)

Cost Ctr/Code budgétaire (G1234567) Rpt:  CG1234 0001CS          (01-Aug-03 to/au 31-Aug-03)          20-Sep-2003

Agoos Medical Library                    (Copy Service/Service de copies)          Our Cost Centre/Code budgétaire: 0108267
```

No	Cost Ctr/Code budgétaire	Patron/Usager	Dept/Dép	MailStop/Destination	Chg/Frais	ReqID/No de demande	Item/Réf	Date Rec'd/reçu
1	G1234567	Berrada Driss	GAST	GZ-216	$5.00	COPY0308061	1996 Eur J	06-Aug-03

```
Total Items For/Total des requêtes pour G1234567: 1          Total Charges/Total des frais:     $5.00
```

The col headers above print well spaced on the paper printout.

HTML Copy Service Cost Center Reports are quite similar to regular HTML Cost Center Reports (with the usual Copy Service additions) and are saved under the Invoice Number filename without the CS appended at the end. Here's an example:

This is a Cost Center Invoice/Report saved also as an HTML file in the Export folder.

Copy Service Invoices are saved under the filename without the trailing CS.

```
(01-Jan-03 to 31-Jul-03)

Cost Center (Medical Library) Report #: CMEDIC 0010CS          16-Aug-2003

   Agoos Medical Library                    (Copy Service) Cost Center: 0108267

                                             Invoice Total: $2.00
```

Item#	Cost Ctr	Patron	Dept	MailStop	Charge	ReqID	Item	Date Rec'd
1	Medical ...	Daly, Jay	MED		$2.00	COPY0307071	2003 J bio	07-Jul-03

```
Total Items For Medical Library: 1          Total Charges: $2.00
```

The **Canadian format for Cost Centre Invoices/Reports (Copy Service)** differs a bit from the English only in HTML because of the length of the fields:

```
HTML Version of Cost Centre Copy
Service Report/Invoice (Canadian format)          (01-Aug-03 to/au 31-Aug-03)

   Cost Ctr/Code budgétaire (G1234567) Rpt: CG1234 0018CS          20-Sep-2003

     Agoos Medical            Our Cost Centre/Code budgétaire (Copy Service/Service de copies):
     Library                                                                    0108267

                        Invoice Total/Montant total facturé: $5.00
```

No.	Cost Ctr/Code budgétaire	Patron/Usager	Dept/Dép	MailStop/Destination	Chg/Frais	ReqID/No de demande	Item/Référence	Date Rec'd/reçu
1	G1234567	Berrada, Driss	GAST	GZ-216	$5.00	COPY0308061	1996 Eur J	06-Aug-03

```
Total Items For/Total des requêtes pour G1234567: 1          Total Charges/Total des frais: $5.00
```

281.

Running Cost Center Reports as Reports Only

Since Cost Center Reports are also Invoices, they will make all the normal changes to **Local Status**, **LocalCHRG**, **LocalInvoice**, etc., and will post an added record to the **tblDepInvoices Table**. If you want to run the Cost Center Report as a report only, use this strategy:

1. **BEFORE running any Invoices** for the period in question, run the Cost Center Report for that period.

2. Go back to the Local Billing Grid and search the same time period as the Report, **Search By Invoice No.** "**Containing**" Inv=C. This will fill the Grid with all the items on the Cost Center Report for that period. (You can also search by **Local Status = InvDep** if you know there were no other invoices run for a Department during that period; Cost Center invoices are marked with Local Status InvDep.)

3. Change the **Local Status** of the top row back to **Open**.

4. Click the **header on the Local Status column** and choose **Global Change**.

5. **Click Ok** when asked whether you want to change all values in that column back to Open.

After a brief pause (or perhaps not so brief if you have thousands of items to be reset) while the Global Change goes to work, the **Local Status**, **LocalCHRG**, and **LocalInvoice** values will be returned to **Open**, **0.00**, and **blank**, respectively.

Local Billing Grid

Here's an example of the **Local Billing Grid**, which is accessible through the **Local Billing Tool Bar Button**:

The Local Billing Grid, because it automatically screens out FREE items, makes searching and editing a bit less complicated for preparing Invoices, but be sure to check the general Borrow Grids periodically for items mistakenly filed as FREE. Clicking on a cell in the Patron Column of any Grid will expose the **To Patrons button**, where a Patron's charge may be quickly edited, so that future requests are filed with the proper charge. Clicking in the Dept Columns will expose the **To Depts button**, for similar editing of Departments. Clicking in most other Columns will expose

the **To Payments button**, for **recording Local Payments**, **deleting Local Invoices**, **deleting Local Payments**, etc.

Lender Column Shows at far right of Local Billing Grid

At the far right of the Local Billing Grid is a column titled **Lender**, which holds the code for the **Lending Library** of that item. In most cases, knowing the Lender isn't important in Local Billing, since the Local Billing charges are computed separately when the item is received. There are cases, though, when it might be useful to know who the Lender was when you're editing in the Local Billing Grid; the Lender column appears at the far right of the grid:

Because the Lender column appears last, it will probably be truncated or off screen entirely in most cases. Nevertheless, since it won't be consulted very often, it's safe to leave this column relatively unseen:

In the case above you can just barely make out the L for Lender in the header of that column. When you need to check the Lender value, just click into that row (as in the OC24809840 RQNO cell above) and press the **End key**.

This brings the focus to the Lender column at the end of the row. You'll notice that the cells in this column are **Read-Only**---they can't be edited here---they're for your information only. Press

the **Home key** to return to the beginning of that row, or the **Enter key** to move to the beginning of the next row.

This column can be **sorted**, though, in case you want to gather all the Loans from a single Lending Library together. Left-click the header over the **Lender column** to get the **Context Menu** and choose either **Sort Ascending** or **Sort Descending**.

Show ALL Items in the Local Billing Grid

In the Local Billing Grid, **No Charge (0.00) Items** are usually **excluded** in the records retrieved. Items must have a charge in either **CHRGAsPatron**, **CHRGAsDept** or **LocalCHRG** to appear in the Grid. In some cases, though, you may want to see ALL of a Patron's or Department's items for a certain period, to be sure that all items for which a charge should apply were actually charged as specified.

You can cause the Local Billing Grid to **show FREE items as well as charged items** by checking the **Also Show 0.00 Items checkbox**.

The same search, run with the checkbox unchecked, would have retrieved no items for Patron Eberhart.

Print Patron Invoice (in Local Billing Grid)

The **Print Patron Invoice** button creates an Invoice for the Patron selected. Before you can create a Patron Invoice from the Grid, however, you need to first select the Patron to Invoice by clicking the **Search By Patron** ribbon button and choosing the Patron from the **Patrons List**.

The resulting list will include **ALL Items** for that Patron during the period specified, but only those with **Local Status equal to Open** and **CHRGAsPatron greater than 0.00** will be included in the Invoice.

Print Dept Invoice (in Local Billing Grid)

The **Print Dept Invoice** button (was Create Dept Invoice in earlier versions of QuickDOC) creates an Invoice for the Dept selected. Before you can create a Department Invoice from the Grid, however, you need to first select the Dept to Invoice by clicking the **Search By Patron** ribbon button and choosing the Patron from the **Depts List**.

The resulting list will include **ALL Items** for that Department during the period specified, but only those with **Local Status equal to Open** and **CHRGAsDept greater than 0.00** will be included in the Invoice.

The **Print Patron Invoice** or **Print Dept Invoice** buttons create an Invoice on the spot for whichever Patron or Dept has been selected for items received during the period from the Beginning Date to the End Date selected. Here are the steps to create an Invoice for Patron Edie Albano using the Create Patron Invoice Ribbon Button of the Local Billing Grid.

1. Display Grid records for the time period involved:

The list is sorted by Patron Name (but we can change the sort by clicking on the column header ans selecting a different sort order). We can see two Albano requests in rows 4 and 5 of the Grid.

2. Click the **Search By Patron** ribbon button to select the Albano record.

264 Patron Record(s) Retrieved

Patrons List

Last ↕	First	M	Dept	
(None)			(None)	
Abzug	Joe		INF DIS	
Accurso	Frank		8115	
Adams	Nancy		PUL MED	
Albano	Edie		7540	
Al-Owain	Mohammed		7585	
Amer	8110		INF DIS	
Ansari-Jones	Asad		INF DIS	
Aubrecht	Kathleen		RADIOLOG	
Balasubramai	Vivek		8115	
Barqawi-Jone	Al		NEPH	
Barrera	Jose		7210	
Bassal	Mylene		PHAM	
Beresford	Carol		?	
Berg	Gene Orth		ORTH	
Berman	Stephen		?	
Bogan	Paul		WP	
Bosh	Jeannie		META	
Brekke	Dona		?	

Ribbon buttons: Search By Patron | Search By Dept | Create Patron Invoice | Search By Status of Request | Search [Invoice N...]

n Last Name | Equal To | ▼ |

ng Characters of Search Item. Press ENTER (or) in Blank Field To Retrieve All Records.

Save Change

Clicking this Ribbon Button displays the Patrons List. Click once on the Patron you want to Invoice to display items for that Patron.

Then click the Create Patron Invoice ribbon button to actually print the Invoice.

This will bring the two Albano records only into the Grid. Ready to create the invoice.

Ribbon buttons: Search By Date & ReqNo | Search By Patron | Search By Dept | Create Patron Invoice | Search By Status of Request | Search By Invoice No. | Search | By Dates | Print Recs | To Pmts | Exit

Search Patron Last Name | Equal To | ▼ | Albano

2 Record(s) retrieved
Use ? As WildCard For Any Single Letter or Number

These two items came up for Patron Albano. To print the Invoice just click the Create Patron Invoice ribbon button above. Invoice will be printed, Status changed to InvPat, and the Invoice number (P+Patron Number for Patrons) will appear in the Local Invoice column at the far right.

Save Changes

Search Dates Set To : 01-Jan-02 to 22-Jul-02.
If this Patron is not the one you want, click back into the Search Text Box to get another Patron List

Requests By Individual Patron

	RQNO	Patron	PatChrg	Dept	CostCenter	Item	Local	Rush	Local	Recd	Paid On	Local
	5752428	Albano	$0.30	7540	7887	1999 Cancer prac	Pickup	No	Open	1/31/2002		
	5498016	Albano	$0.80	NC	6100	2000 Pediatric he	Pickup	No	Open	1/31/2002		

3. Click the **Print (Create) Patron Invoice** ribbon button to create the Invoice. When printing is finished you'll be brought directly back to the Grid, with Local Values changed as appropriate:

Ribbon buttons: Search By Date & ReqNo | Search By Patron | Search By Dept | Create Patron Invoice | Search By Status of Request | Search By Invoice No. | Search | By Dates | Print Recs | To Pmts | Exit

earch Patron Last Name | Equal To | ▼ |

2 Record(s) retrieved
Use ? As WildCard For Any Single Letter or Number

After the Invoice is printed, related values are updated on the Grid, in the LocalStatus and LocalInvoice columns, shown below. The (unseen) BorrLocalCHRG column is set to equal the PatCHRG or DepCHRG, depending upon the type of Invoice.

Search Dates Set To : 01-Jan-02 to 26-Jul-02.
Borrower Recs where [Local CHRG <> 0] and [Local Status = Received], for Printing an Invoice

Requests By Individual Patron

	RQNO	Patron	PatChrg	Dept	CostCe	Item	Local	Rush	Local	Recd	Paid On	LocalInvoice
	5752428	Albano	$0.30	7540	7887	1999 Cancer prac	Pickup	No	InvPat	1/31/2002		[Inv=P142 0
	5498016	Albano	$0.80	NC	6100	2000 Pediatric he	Pickup	No	InvPat	1/31/2002		[Inv=P142 0

Invoices printed from the Grid are no different in format from those printed in batch. Unless you have set the **Print HTML Copies** value in the **Local Preferences Form** to **Never**, you are also asked before the Invoice is printed if you also want to save an HTML version of the Invoice:
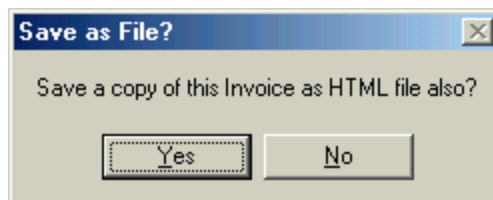
If you have indicated that you want **Separate Copy Service Invoices?** in the Local Preferences Form, and if the set of items to be invoiced contains at least one Copy Service item, then you will also see another message box:
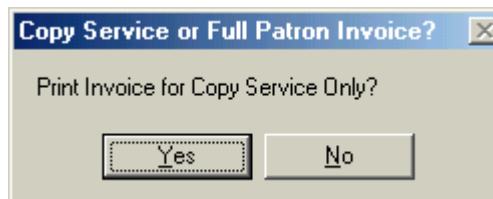
If you want only the Copy Service items to be invoiced, click Yes. This will produce an Invoice just for Copy Service. You can then click Print Patron Invoice again and, since all the Copy Service items will already be set to InvPat, only the ILL items (if any) will be included in this next invoice printed.

Again, this process is only necessary if you want Copy Service activity billed separately from regular ILL activity. If you always include both on one invoice, then uncheck the Separate Invoices checkbox in Local Preferences and you'll never see this message box.

Invoices for items printed from the Local Billing Grid will be printed using the **last Printer you specified when printing an Invoice Run**, and in the number of copies specified then, as well.

Patron Invoice Numbers

Patron Invoice Numbers are created as follows: First, a P identifies it as a Patron bill. Then the actual Patron Number is used, to identify it with that patron. After a space, a formatted **four-digit number** is added, the numbers running from 0001 to 9999. The count for **Patron Invoice Control Numbers** is kept in the value **LastPatInv** in **tblLocals**. A typical Patron Invoice Number is **P1234 0002** where 1234 is the Patron Number of the Patron being invoiced.

After 9999 the number resets back to 0001, so that there will be about 10,000 patron invoices before the control number reappears. Even then, the left side of the Patron Invoice Number (which includes the unique Patron Number) should, in most cases, make it unique. Nevertheless, QuickDOC will check **tblPatInvoices** first, to prevent **duplicate Invoice numbers**. **If the invoice number already exists in tblPatInvoices**, then the **Patron Invoice Number** is altered, by adding a single digit at the end of the invoice number, from 1 to 9 and then from A-Z, until the resulting number is unique in tblPatInvoices. If the next Patron Invoice number is 0002, and the Patron Number is P1234, and the Invoice number **P1234 0002** already exists, the Invoice number will be changed to **P1234 00021**:

HTML Copies of Invoices will also use the augmented version of the Invoice Number, but the filename saved will ignore the newly-added digit, so that invoice **P1234 00021** will be found under filename **PInv0002** in the Export folder. Since these files are transitory by nature (they're sent off promptly as email attachments to Patrons), this should not result in any future problems of duplication.

Department Invoice Numbers

Department Invoice Numbers are created as follows: First, a D identifies it as a Department bill. Then the first five digits of the Department Abbreviation are used, to identify it with that Department. After a space, a formatted **four-digit number** is added, the numbers running from 0001 to 9999. The count for **Department Invoice Control Numbers** is kept in the value **LastDepInv** in **tblLocals**. A typical Department Invoice Number is **DNEPH 0002** where NEPH is the Department Abbreviation for the Department being invoiced.

After 9999 the number resets back to 0001, so that there will be about 10,000 Department invoices before the control number reappears. Even then, the left side of the Department Invoice Number (which includes the unique Department Number) should, in most cases, make it unique. Nevertheless, QuickDOC will check **tblDepInvoices** first, to prevent **duplicate Invoice numbers**. **If the invoice number already exists in tblDepInvoices**, then the **Department Invoice Number** is altered, by adding a single digit at the end of the invoice number, from 1 to 9 and then from A-Z, until the resulting number is unique in tblDepInvoices. If the next Department Invoice number is 0002, and the Department Number is DNEPH, and the Invoice number **DNEPH 0002** already exists, the Invoice number will be changed to **DNEPH 00021**.

HTML Copies of Invoices will also use the augmented version of the Invoice Number, but the filename saved will ignore the newly-added digit, so that invoice **DNEPH 00021** will be found under filename **DInv0002** in the Export folder. Since these files are transitory by nature (they're sent off promptly as email attachments to Depts), this should not result in any future problems of duplication.

Cost Center Invoice Numbers

Cost Center reports/invoices are essentially Department Invoices, but are sorted by Cost Center and have invoice numbers that begin with a C rather than a D. Then the first five digits of the Cost Center are used. After a space, a formatted **four-digit number** is added, the numbers running from 0001 to 9999. The count for **Cost Center Invoice Control Numbers** is kept in the value **LastDepInv** in **tblLocals** along with the Department Invoice count, since these are, in fact, Department invoices. A typical Cost Center Invoice Number might be **C12345 0002** where 12345 are the first five digits of the Cost Center. Methods for creating uniqueness are the same as for Department Invoice Numbers.

HTML Copies of Invoices will also use the augmented version of the Invoice Number, but the filename saved will ignore the newly-added digit, so that invoice **C12345 00021** will be found under filename **CInv0002** in the Export folder. Since these files are transitory by nature (they're sent off promptly as email attachments to Cost Centers), this should not result in any future problems of duplication.

Reprint an Invoice

You can **Reprint a single Invoice** for any invoice listed in the **Invoice Column** on the Local Billing Grid by **clicking once on the Invoice cell to be reprinted**, then clicking the '**Reprint**' Button.

Invoices reprinted in this way will be printed, using the last Printer you specified when printing an Invoice Run, and in the number of copies specified at that time. The Reprint will include all items with that Invoice Number in the Invoice column and will re-calculate the Invoice Total as it prints, so that, if you delete an item, and then reprint that Invoice, the Invoice will include the original invoice total at the top, but a revised total at the bottom.

 Payments made on an Invoice are subtracted from the Invoice Total at the top, and are also noted as Payments at the bottom of the Charge column, along with both the original and revised Invoice Totals.

On Invoices printed or Reprinted from the Local Billing Grid, you are asked before each Invoice is printed whether you also want an **HTML Invoice file saved**:
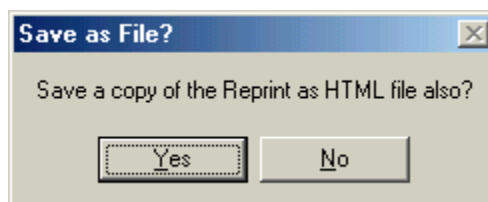
If you never print HTML Invoices, set the **Print HTML Copies** value in the **Local Preferences Form** to **Never**, and you will not see this prompt. Invoice Reprints in HTML follow a similar format to Reprints on paper:

PInv0008 - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help

Back ▼ → ▼ ⊗ ⊡ ⌂ | ⊗Search ⊞Favorites ⊛History | ⊒▼ ⊜ ⊡ ▼ ⊟

Address ⊠ C:\Program Files\Microsoft Visual Studio\VB98\QuickDOC\Export\PInv0008.htm   ▼ ⊘Go

A Reprint of Invoice P66 0008 will save again a
copy to ...\Export\PInv0008, with the additional
Reprint features, such as the Reprint Date and
any payments already made to the Invoice.

Invoice

01-Aug-02 to 07-Feb-03

[First Print: 7-Feb-2003.]

7-Feb-2003   **Invoice Number: P66 0008**   **Page 1**

Make Check Payable To: Agoos Medical Library   Terms: NET 30
Beth Israel Deaconess Medical Center   Tel: 617.667-4225
Agoos Medical Library   Fax: 617.667-7197
330 Brookline Ave.   Email: asilver@caregroup.harvard.edu
Boston, MA 02015

Cost Center: 108266

Include copy of Invoice or Inv No. with payment

Pat F̶̶̶̶ R.N.

List of Patron Invoices Outstanding Report

List of Dept/Cost Center Invoices Outstanding Report

The Local Billing Menu Bar choice now also includes a choice for a Report of **Patron Invoices Outstanding** and **Dept Invoices Outstanding** (which includes Cost Center Reports).

Lists of Invoices Outstanding include all invoices generated during the period specified that have not been paid, or have received only partial payment. The Patron List has the following format:

This list for Patrons includes the
Patron's Last Name, as a note, since
the Inv No. is based on the Patron No.;
Invoices can be reprinted from the
Local Billing Grid's Local Invoice Col.

List of Patron Invoices Outstanding
01-Nov-02 to 28-Feb-03

12-Feb-2003   Beth Israel Deaconess Medical Center (01-Nov-02 to 28-Feb-03)   Page 1

Inv #	Invoice Date	Invoice No.	Inv Total	Paid	Paid Date	Balance
1 (Frangioni)	08-Nov-02	P1040 0004	$10.00			$10.00
2 (Kerr)	08-Nov-02	P1058 0005	$5.00			$5.00
Totals for 08-Nov-02: 2			**$15.00**			**Balance: $15.00**
1 (Folcarelli)	07-Feb-03	P66 0008	$10.00			$10.00
Totals for 07-Feb-03: 1			**$10.00**			**Balance: $10.00**
1 (Du Buske)	08-Feb-03	P1051 0009	$15.00			$15.00
Totals for 08-Feb-03: 3			**$15.00**			**Balance: $15.00**
TOTAL INVOICES: 4		**TOTAL INVOICED: $40.00**				**Balance: $40.00**

Invoices are broken out by the
date the Invoice was sent.

The Dept and Cost Center List is the same, but without the Patron Last Name, since the Dept Abbreviation is embedded in the Invoice Number itself:

Invoices can be reprinted by searching for the Inv No. in the Local Billing Grid and clicking into the Local Invoice column

List of Dept/Cost Center Invoices Outstanding
01-Jan-03 to 28-Feb-03

12-Feb-2003   Beth Israel Deaconess Medical Center (01-Jan-03 to 28-Feb-03)   Page 1

Inv #	Invoice Date	Invoice No.	Inv Total	Paid	Paid Date	Balance
1	07-Feb-03	DBWEL 0001	$26.00			$26.00
2	07-Feb-03	DNEPH 0002	$16.00			$16.00
Totals for 07-Feb-03: 2			$42.00			Balance: $42.00
TOTAL INVOICES: 2		TOTAL INVOICED: $42.00				Balance: $42.00

This list can be used to reprint a second notice for selected invoices. A more automated process for generating second notices is still planned for some time in the future.

Deleting an Invoice - Local Billing Grid

If you click once in the **LocalInvoice column** of the Local Billing Grid, the **To Pmts** button will appear just above the Grid. Use this button both to delete (or post) payments and to delete the Invoice listed in the LocalInvoice column. **If there is a payment posted to the Invoice, you must first delete the payment before deleting the Invoice**.

A **Payments From Patrons, Depts Form** for an Invoice that has already been paid will look like this:

First delete the Payment by clicking the **Delete Payment button**. This will produce the usual Message Box asking if you are sure:

When you click Ok, the payment is deleted and the affected items in the Grid are returned to Invoiced status.

Item	Local	Rush	Local	Recd	Paid On	Z↓LocalInvoice
All Local Billing Items - By Reques			**Status now InvPat; Paid Date is blank.**			
1998 Patient educ	Pickup	No	InvPat	4/12/2002		[Inv=P370 0198]
1990 Plastic surg	Pickup	No	InvPat	4/12/2002		[Inv=P370 0198]

At this point we are now ready to delete the Invoice itself. Click back into a LocalInvoice cell that contains the Invoice we want to delete. Then click **To Pmts** again. The Payments From Patrons, Depts Form returns.

If the Delete Button still reads "Delete Payment," click once on the **Invoice Number Combo Box**. The button will change to "Delete Invoice" and will be enabled. After you click the **Delete Invoice Button**, you'll get the "Are You Sure?" Message Box.

If you click Ok, the Invoice will be deleted from the appropriate Invoices Table, all items in the Grid for that Invoice will be reset back to Received, and the LocalInvoice value will be blank.

Rerun a batch of Local Invoices

You can **Rerun a batch of Patron, Department or Cost Center Invoices just printed** by using the Global Change function on the Local Status column to reset all the invoiced items back to Open. This process will also remove each item from either the **Patron or Department Invoices Table**, depending upon the type of Invoice printed, and **delete each invoice** when all of its items have been deleted.

Deleting a batch of Local Invoices

Sometimes, perhaps as a result of a paper jam or some other infelicity during an Invoice run, the run is interrupted and, while the changes are made to the database, not all the Invoices are printed. You have two choices to rectify this situation.

1. If only a few invoices remain unprinted, use the Local Billing Grid and **Reprint Invoice** for each of those missing.

2. If more than a few are unprinted, your best bet is to **delete the Invoice Batch entirely** and rerun from scratch.

The steps for deleting a batch of Invoices just run are illustrated below.

1. **Set the Dates** to the same dates for which the batch of invoices was run.

2. Click the **Search By Status** Ribbon Button and choose **Equals Inv Patron or Inv Dept**.

3. Click **Search** to retrieve those items.

4. **Change the Local Status of the top row** from **InvPat** (or **InvDep**) to **Open** and click **Save Changes**. This step will also remove the charge for that item from the Invoice Record in the appropriate Invoices Table (**tblPatInvoices** or **tblDepInvoices**).

5. Click the **header on the Local Status Column** to get the **Header Context Menu**.

6. Click **Global Change**. This will select all the items in that column for change.

7. Click **Ok** at the message about changing all values to Open.
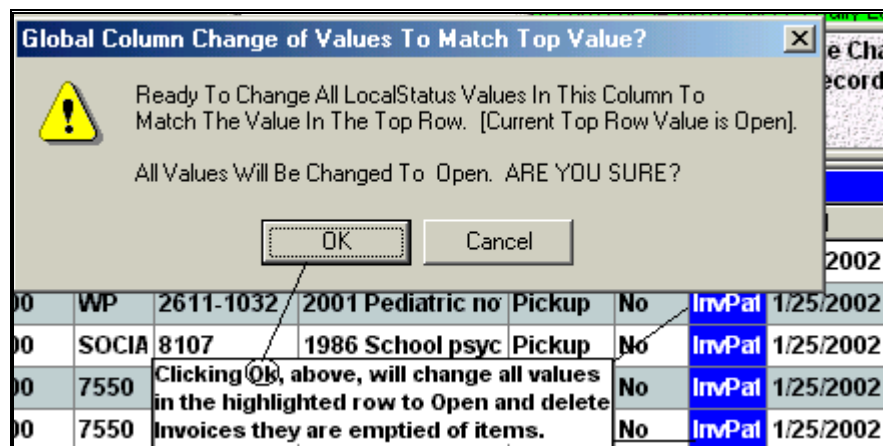
8. Local Status will be changed back to Open for all; **All Invoices from that run will be batch deleted from tblPatInvoices (or tblDepInvoices)** once all the Invoice's items have been reset back to Open; the **LocalInvoice column will be cleared**; and these items will now be eligible for a new Invoice run on the Local Billing menu.

N.B. The new batch of Invoices will begin with the **next Local Invoice Number** after the last number of the deleted batch; the numbers will not be reset. In most cases this sequential number won't matter, but if you were using it to guage the number of Invoices printed within a certain time period, for example, that number would not be accurate after using the method above.

Changing Local Charge after Invoice not allowed

Once an invoice is printed, Patron, Department or Cost Center Report, you'll get an error message ("**Change $ not allowed here! First change back to Open**") if you try to change the charge field. In the case below, we tried to change the $4.00 charge to $5.00:

The same will occur if the Status were InvDep. To reset the charge (assuming you haven't already sent out the Invoice), go to the Local Billing Grid (if you're not already there), Delete the Invoice (see above), change the charge and re-run the Invoice for that Patron.

Invoice Troubleshooting

<u>Box at the top, where the Return Address, etc., should be, is empty.</u>

First check under '**Setup**' and '**Billing Setup**' on the Menu Bar, to be sure you have values entered for the return address, etc. If these values are there (and they appear in Print Preview but not on the actual printout), then the **missing Invoice return address** values are probably the result of a layering mismatch when your printer prints the page. This seems to work for HP printers with the problem, and may wprk with others:

1. Click **Start,** then **Settings**, then **Printers** on the Win9x desktop.

2. Right-click your default printer and choose '**Properties**'.

3. Click the '**Graphics**' Tab to show the Graphics info form.

In the box at the bottom you have a choice of **'Graphics Mode'** with two option buttons: Raster Graphics and Vector Graphics. The 'What's This?' help for Vector Graphics reads:

Controls how the printing information is rendered by your printer. Using Vector Graphics can significantly increase printing speed. However, if you have problems, *such as incorrect overlaying*, trying choosing Raster Graphics.

[Italics added.] "Incorrect overlaying..." sounds about right. When we changed from Vector Graphics to Raster Graphics on our HP5, the address and other data miraculously appeared.

If all else fails, though, simply check the **Suppress Invoice Box** checkbox on the **Billing Setup** form.

It's easy enough to sacrifice the fancy box, if it obscures what lies within. Once you've registered this choice, the Invoice will be printed without the surrounding box.

Local Billing Troubleshooting

Why do some records appear in our Borrow tables, marked as received, but do not appear in our Local Billing table when we want to go mark them as paid?

If an item seems to be **missing from the Local Billing Grid** it's usually because, for whatever reason, no Patron or Dept charge was associated with it. Perhaps the **Patron Charge Profile** was "Free" at the time it was checked in, or the profile used the "**Use Cost as Charge**" type profile and the Library charge was 0.00.

It's hard to say after the fact, but you can usually fix it by checking the "**Also show 0.00 items**" checkbox and then re-clicking Search. This should give you everything for that set of dates, including free items. Scroll down to the one you want and change the 0.00 Patron Charge to whatever you want. While you're there, click once into the Patron field to expose the **To Patrons** button at the upper right. Clicking that button will bring you to the Patron record, where you can make sure that the **Local Charge Profile** assigned to that patron is the one you want. If it isn't, you can change it there. This change will inform any new items received for that patron, but it won't alter anything already checked in, so you'll want to scan the Local Billing grid to see if you have any other items that you need to edit.

Local Payments

Payments can be made using a variety of **Payment Methods** and **Payment Types**.

Local Payment Methods

These appear in a Dropdown Combo Box on the Payment Information Form, and include the usual methods of payment: **AMEX**, **Cash**, **Check**, **Credit**, **EFTS**, **IFM**, **Invoice**, **MasterCard**, **Other, Transfer, Visa** and others. Some of these payment methods aren't applicable to Local Transactions (EFTS and IFM, for example), but since the Payment Methods Table is used in both Borrowing and Lending, they appear as choices anyway.

The **Payment Methods Table** is crucial to much of the database work, so please don't discard this Table (it has happened once or twice in the past). As with any necessary table, the absence of this table will interfere with normal QuickDOC processing. If you have to re-create the tblPmtMethods Table, the default values are as follows:

1. AMEX
2. Cash
3. Check
4. Credit (non-cash credit for an item)
5. EFTS (not usually a Local payment choice)
6. IFM   (not usually a Local payment choice)
7. Invoice
8. MasterCard
9. Other
10. Transfer
11. Visa
12. Deposit Acct.
13. Request (by Request Number)

Payment Types (Local Patron/Dept)

These include:

1. Invoice

2. Credit (non-cash credit for an item---better to use a "Free Number Before Charge" type Profile)

3. Deposit Acct.

4. Request (by Request Number)

5. Other

Payments of all types may be made using the **Local Billing Menu Bar choice, Payments**.

Payments are also commonly made on the **Local Billing Grid**, going directly to the Local Payments Form from the Grid item to be paid.   Some payments (**Pre-paid items** and **Quick Pay Local Payments**) can also be made directly on the **Requests Outstanding** and **Borrow Item Backfile** Grids.

Pre-payments on the Requests Outstanding Grid

In many cases, Libraries will require Patrons to **Pre-Pay** for items to be ordered. Typically, this will be a fixed charge per item, although it can be set up in many different ways. In QuickDOC, requests that are Pre-Paid will be **automatically set to PaidPt when they are checked in as Received**.

If the Patron pays up front, you will have the necessary information at the time the request is sent in QDPortal. Once all requests are sent, click the **Import QDPortal** Tool Bar button in QuickDOC to bring the new items into the Requests Outstanding Grid. To put today's requests at the top, click the header of the **Sent Column** and choose **Sort Descending**.

For each item you want to **Pre-Pay**, click the **Chrg Column** for that item; a **PrePay Button** will appear to the upper right:

If you click Pre-Pay, an Input Box will appear, noting the following Default Values that will be associated with the Payment:

1. The **Default Local Payment Method** will be whatever has been set for your Local Payments (this is currently set to the last Payment Method chosen when a payment was recorded in Local Billing).

2. The **Default Payment Note** will always be '**Pre-payment for RQNO** nnnnnnnn'; this note field is used later to match up the payment when the item is Received, so it's necessary that it should remain in that format.

In order to **prevent duplicate Patron Pre-payments**, a lookup is made before the payment is filed. If an earlier Pre-payment is found, a Message Box explains:

If the pre-payment isn't a duplicate, it's filed in the **Deposit Account Table for Patrons** (**tblPatDeposits**), with a matching entry in the gatekeeper Table, **tblPatCredits**---tblPatCredits is checked first on any search to see if the Patron involved has a balance of **any** kind (either a real Deposit or a vague Credit, but steer clear of vague Credits if you can; a Local Charge Profile with a certain number of 'Free Items Before Charging Begins' is a much easier way to manage this).

As far as QuickDOC is concerned, Deposit Accounts and Payment Accounts are tracking real money, so that various comparative reports should be possible. Once the vague 'Oh, give a credit for this' mindset intrudes, then accountability is out the window. Think Enron.

Since the prepayment is held in abeyance until the item is received, you won't notice any obvious change in the grid (other than a small notice in green that '**Prepayment for RQNO 6339076 completed**' in the box beneath the **Records Retrieved** box).

At this point it's just waiting for the Outstanding Request to be checked in as Received.

An **Outstanding** item is changed to **Received** in a variety of ways. It can be changed by clicking the Mark Rec'd Button on the Requests Outstanding Grid; it can be Received by changing its status from Outstanding to Received in the Requests Outstanding Grid; it can also be changed to Received as a part of a Global Change of requests from [whatever] to Received. Loansome Docs that are filled in-house are changed from Outstanding to Received automatically upon import of the action taken on DOCLINE.

In the course of changing an item from Outstanding to Received, by any of the above methods, a check is made to see if there is a balance for this Patron in tblPatCredits. If there is, then a search of the **tblPatPayments Table** is performed, to see if this item has been Pre-Paid (the **PatPaymentNote** field will contain a "Pre-payment for RQNO 6339076" note for that Request Number).

If a pre-payment is found, the charge being held in tblPatDeposits is assigned to the Request Number it's being held for (6339076, in the above example), a debit entry is made in both tblPatDeposits and tblPatCredits, and the item's **Local Status is changed to PaidPt** and the original **Local Date Paid** is assigned the original date of the pre-payment.

Local Payments Made from the Borrow Items Backfile Grid (Quick Pay)

In addition to the ability to Pre-Pay an item while it's still Outstanding, it will also be useful at times to be able to post a quick payment directly on the Borrow Item Backfile Grid, without having to exit and fire up the Local Billing Grid. This process is similar to the Pre-Pay process, and uses similar defaults to record the payment.

For each item you want to **Quick Pay**, click the **Chrg Column** for that item; a **Local Pmt Button** will appear to the upper right:

If you click Local Pmt, an Input Box will appear, noting the following Default Values that will be associated with the Payment:

1.   The **Default Local Payment Method** will be whatever has been set for your Local Payments (this is currently set to the last Payment Method chosen when a payment was recorded in Local Billing).

2.   The **Default Payment Note** will always be '**Pre-payment for RQNO** nnnnnnnn'; this note field is used later to match up the payment when the item is Received, so it's necessary that it should remain in that format.

Local Status must be Open for Quick Pay. If you attempt to Quick Pay an item that has a Local Status of anything but Open, the payment will be aborted.

Once the Quick Pay is posted, the values describing the payment are filed in the **tblPatPayments Table**, with a **unique Payment Number** (in the form **Pmt000nnn**), a **PatPaymentInvoice** value equal to the Request Number, a **PatPaymentAmount** of whatever was entered in the Input Box, a **PatPaymentDate** of Today, a **PatPaymentNote** in the format 'Payment for RQNO 5440565', a **PatPaymentType** of 'Request', a **PatPaymentMethod** of whatever was your default (Cash, in the case above), and a **PatPaymentCostCenter**, if one was filed with that request.

Because this transaction is complete, other changes are also made in the **Local Status** (it's changed to **PaidPt** in both **tblBorrowItems** and **tblBorrLocals**), and to the **LocalDTPD** and **LocalInvoice** fields of **tblBorrLocals** (Today's Date for Date Paid, and the Payment Number for Local Invoice. Because we're doing this on the Borrow Item Backfile Grid, you will notice that Grid's change of Local Status immediately.

The green notice box also informs you that the posting was successful.

Local Payments By Invoice Number

From the Local Billing Menu Bar Choice

Patron Payment By Invoice Number is the default when arriving for **Payments from the Local Billing Menu**. All unpaid Patron Invoices (along with choices for **Deposit Account** and **Credit**) are listed in the **Invoice Number Dropdown Combo Box**.

Click the **This is a Patron Pmt** button to change it to **This is a Dept/Cost Ctr Pmt** to register a payment by a Department, and to fill the Invoice Number Combo Box with a List of Department or Cost Center, not Patron, Invoices.

If you start typing in the **Invoice Number Combo Box** (and type at the rate of about a letter every .5 second or so), the box will open up at the sixth letter typed to the spot on the **Invoice List** where that Patron's (or Department's) invoices begin (or close to it). Choosing the invoice and moving to the next field (either by pressing ENTER or clicking on it) automatically fills in most of the form: the **Paid By** (Patron, Dept) field, the **Payment Amount** (as a default equal to either the Invoice Total or the Invoice Total less any previous payments, if there were any), the **Payment Date** (today), the **Primary Cost Center** (if there is one) and a default for **Payment Method** (Check). Any of these can be changed, as needed.

From the Invoice column on the Local Billing Grid

You can also **pay an Invoice from the Local Billing Grid**, by clicking on the Invoice to pay in the Grid's **LocalInvoice column** and then the **'To Pmts'** button. This is sometimes faster if the Grid is open anyway, and it will automatically locate the Invoice information you want.

Since we've come from the Local Billing Grid, and the Invoice Number we want has already been selected, most of the payment information has already been filled in and the focus is on the **Amount This Payment** box, with the **Invoice Total amount** entered. If this is a complete payment, just press Enter. The **Add Payment button** will be enabled; make any other changes needed and **click Add Payment** or **press Alt-A** to add it.

Partial Payments on Invoices

Partial payments are filed with the Invoice, but the invoice is left open for future activity. Partial payments are reflected in item activity up to the last full payment for each item. If there isn't enough left over to fully pay the item, it's left marked as "InvPat" or "InvDep" rather than "PaidPt" or "PaidDp" although the full payment amount is applied to the Invoice itself. Here's an example of a partial payment on a invoice:

After the payment is filed, items on the invoice are marked PaidPt until the amount of the partial payment has been reached.

		Patron	PatChrg	Dept	CostCenter	Item		Local	Rush	Local	Recd	Paid On	LocalInvoice
▼													
▣	⊕	Troba ▼	$4.00	HEMO	7887	1999 Clinical labo		Pickup	No	PaidP	1/25/2002	8/4/2002	[Inv=P144 0328]
	⊕	Troba ▼	$4.00	HEMO	7887	1999 Indian J ped		Pickup	No	PaidP	1/25/2002	8/4/2002	[Inv=P144 0328]
	⊕	Troba ▼	$4.00	HEMO	7887	1999 Molecular m		Pickup	No	PaidP	1/25/2002	8/4/2002	[Inv=P144 0328]
	⊕	Troba ▼	$4.00	HEMO	7887	1999 Haematolog		Pickup	No	PaidP	1/25/2002	8/4/2002	[Inv=P144 0328]
	⊕	Troba ▼	$4.00	HEMO	7887	2000 Br J haemat		Pickup	No	PaidP	2/5/2002	8/4/2002	[Inv=P144 0328]
	⊕	Troba ▼	$4.00	HEMO	7887	1999 Br J haemat		Pickup	No	PaidP	2/5/2002	8/4/2002	[Inv=P144 0328]
	⊕	Troba ▼	$4.00	HEMO	7210	Payments down to here total $24.00. The remaining Inv items stay at InvPat.	him	Pickup	No	InvPat	2/8/2002		[Inv=P144 0328]
	⊕	Troba ▼	$4.00	HEMO	7540		nion	Pickup	No	InvPat	2/8/2002		[Inv=P144 0328]
	⊕	Troba ▼	$4.00	HEMO			mat	Pickup	No	InvPat	4/10/2002		[Inv=P144 0328]

Notice that the payment amount of $25.00 was applied to each request until the charge for the request was greater than the amount left over from the payment (the **requests will be marked paid in chronological order**). The $4.00 charge in the seventh row exceeded the $1.00 left from the $25.00 payment after the top six rows were marked. Since this $1.00 credit remains with the Invoice, it will be fully paid with another payment of $43.00 (even though it may look like they owe $44.00, if you were to total the charges in the remaining InvPat rows of this invoice).

An easy way to check this would be to click the '**Reprint Invoice**' button (click into the [Inv=P144 0328] cells on an **InvPat row** to get the **Reprint Invoice button**; it doesn't show up on a row where the Invoice has been paid), which will result in a reprint of all items items, but with the **Invoice Total: $43.00** at the top (rather than the original $68.00) and at the end, rather than the usual "Total Charges: $68.00" that completes a first invoice, there will be three lines at the end of a Reprint with payments applied:

<div align="center">

Total Charges: $68.00

Amount Paid: $25.00

Amount Due: $43.00

</div>

The **Reprint Invoice button can be used in this way to fire off a quick reminder** of an underpayment, as well as a second notice when there is no payment at all.

When the final payment is received and the Payment form brought up again to that invoice number, information from the first payment will reappear:

The Payment Note shows the note left with the first payment, for information only, and will be changed when filing this second payment. The '**Add Payment**' button will be enabled once the suggested "43.00" payment amount is accepted (by pressing ENTER or moving to another field) or some other value is entered instead.

Delete Payment made to Invoice

If a previous payment is shown on the Payment Form, it can be deleted and then re-entered by clicking the '**Delete Payment**' button. If more than one payment has been applied to this invoice, the last payment applied is the one queued up for deleting. In the case of the form above, where we're poised to add the final 43.00 payment, clicking 'Delete Payment' brings the previous payment up for possible deletion. Check the Message Box information carefully to be sure the proper payment is being deleted (although it's easy enough to add it back in again if you make a mistake):

It's the previous $25.00 payment, in the case above, that has been queued up for deletion. When a payment is deleted, the Invoice is restored to its previous values, and any requests that had been marked "PaidPt" are reset back to "InvPat."

Local Payments By Deposit Account

Use the '**Deposit Account**' choice in the Invoices Dropdown Combo Box on the Payments form to register a payment as a **Deposit Account payment**. Deposit Accounts can be established for both Patrons and Departments. There is no Cost Center Deposit Account, but if a Department Deposit Account includes a specific Cost Center, only items with that specific Cost Center will be deducted.

In the case of **Department Deposit Accounts** (but not Patron Deposit Accounts), right after the payment is added, QuickDOC performs a search to see if there any outstanding items still marked as Received that might be paid from this deposit. The **search goes back six months**, or to the **beginning of the current year**, whichever is longer. It won't alter any items that have already been changed to **InvDep** but it will go ahead and pay off any Received items with a **CHRGAsDept greater than 0.00**.

In the case of **Patron Deposit Accounts**, no automatic payment of Open items is performed, but the PatDeposits Table will always be checked first when you attempt to record a payment for that request.

Items paid from Deposit Accounts are available for searching via the LocalInvoices column of the Local Billing Grid, since notations are made there when items are deducted from a Deposit Account, referencing the Deposit Account number. A search on this field is a quick way to get a list and printout of any items charged to specific Deposit Account:

There is also a **table of Deposit Account activity for Patrons (tblPatDeposits) and Departments (tblDepDeposits)**, with individual line items for each activity item. There is no special Cost Center Deposit Account Table; these are kept within the Departments Table.

Department Deposit Acct Auto Payment begins Jan 1 of current year.

After a Department Deposit Acct payment is registered, unpaid Open requests are paid from the **Deposit Account payment beginning** either **six months prior to Today's Date, or at the beginning of the current year, whichever is greater**. This is to prevent this year's Deposit Account payment from being applied to a superannuated request that might have been left at Filled some years previously. You can cause earlier requests (or Patron Requests) to be paid from a Deposit Account by marking them as Paid in the Local Billing Grid. Items changed to **Paid** on the Grid (as well as on the Local Payments Form) are always first checked against a Deposit or Credit Account balance and assigned to that payment if possible.

Delete or Adjust Local Deposit Account Payment.

If a mistake is made when entering a Deposit Account payment, you can **delete or adjust the deposit payment itself** (rather than each item assigned to the account) as follows:

1. Get to the Local Payments Form either from the Local Billing Grid or Local Billing Menu.

2. Check the '**Payment by Request No., Deposit or Credit Acct'** box, if it's unchecked.

3. If the Request Number is in the field, erase that and enter the **Deposit Account payment number** (usually something like Dep000123) in that box instead and press ENTER.

4. Either edit the '**Amount This Payment'** box, or click '**Delete Payment'** to begin again.

Deleting and re-entering is probably the preferred method, in which case all the values of the payment will be new. If you choose to edit the payment amount, only that value will change in the payment record. In both cases, any rollbacks or additions to items paid will be performed on requests affected.

Local Payments By Credit

The **Credit payment** is another choice available in the Invoices Combo Box. While this choice can be used to post a certain credit amount to a Patron or Department, it's recommended that you use the Free Items before Charge type Local Profile instead.

There's no line item table for these events---although there are tables for Patron Credits (**tblPatCredits**) and Department Credits (**tblDepCredits**) that keep just the running total. These are paired off with matching items that can thereby be marked as Paid as they occur. On the Local Billing Grid, the **LocalInvoice column** for these items will have a notation of **CreditPatron** or **CreditDept**, depending upon which type is used.

Items are deducted from the appropriate Credits Table only if there's enough in there for that library to cover the total charge of the request. As with Deposit Accounts, requests paid from the Credits Table are marked Paid automatically, at the time their Local Status is changed to either **PaidPt** or **PaidDp**, using the appropriate CHRGAs Patron or CHRGAsDept. It will be a good idea to make sure that these charges are the correct ones, although incorrect charges can be changed at any time (if a charge is changed on any Grid for an item that has been marked as Paid from a

Credit account, that change will be percolated back into the Credits Table---and Deposits Table for Deposit Accounts---at the time the change is recorded).

If the remainder in the Credit Table is less than the cost of the item, it just sits there, waiting for an item it can cover, and the uncovered item remains marked "Open" and is a candidate for the next Invoice run.

If you choose **Credit as the Local Payment Type** from the dropdown box, also choose **Credit from the Payment Methods combo**. This will be useful later for determining actual cash income (as opposed to barter income) received as a result of internal Document Delivery activity.

This semi-official status of Credit Payments is yet another reason to avoid using them; some confusion will nearly always result.

Credit Payment Type vs. Credit Payment Method

The **Credit Payment Type** appears in the Invoice Combo Box, along with Deposit Account, as a choice along with the list of all unpaid Invoices. The **Credit Payment Method** appears in the Payment Methods Combo List.

If you enter an amount with the **Credit Payment Type**, it will be added to the total available for the Patron or Department making the payment in the appropriate **Credits Table**. The Payment Method might be Check or AMEX or Transfer or whatever (even Credit, although this choice will cause the inference that no funds actually changed hands). If you use the **Credit Payment Method** with a Payment Type other than Credit, the payment will be applied to the Request or Invoice cited, but no change will be made to the balance, if any, in the related **Credits Table**. **If there is real money changing hands, always use the Deposit Account Method rather than the Credit Method**.

Delete or Adjust Local Credit Account Payment.

Deleting and re-entering is absolutely the preferred method for editing credits, in which case all the values of the payment will be new. If you choose to edit the payment amount, only that value will change in the payment record. In both cases, any rollbacks or additions to items paid will be performed on requests affected.

Local Payments By Request Number

Payments by Request Number can be recorded on the Local Payments Form, **from the Local Billing menu**, by clicking on the "**single Request Number**" check box and typing in the Request Number itself, but it's a bit easier to do it **from the Local Billing Grid**. Click on the row with the item to be paid in the Grid, and then click the '**To Pmts**' button on the upper right. This will bring up the Payments Form with the Request information already filled in. Choose the appropriate Payment Method and amount, etc., then click '**Add Payment**' to save. The Payment Number assigned will be available in the Invoice column of the Local Billing Grid.

Marking an item as Paid in the Local Status column of Local Billing Grid

You can record a quick **payment by changing the Local Status column on the Local Billing Grid** directly, editing it from Open to either **PaidPt** (for Patron Payment) or **PaidDp** (for Department or Cost Center Payment). The '**Paid On**' column will be changed automatically to Today's Date, if left blank, or it can also be changed before filing---using either the calendar dropdown or by entering the date correctly---to the correct date for that payment. Requests marked as Paid in this way have no other supporting information (no Check Number in Notes, no specific Payment information). A payment entry is recorded, though, with the Request Number as identifier, **Payment Method** will be your **Default Payment Method** and the Payment Amount

307.

will be equal to the Request Charge. The **Payment Type** is "**Request**." It is also assigned a
Payment Number, which will appear in the Local Invoice Column of the Local Billing Grid:

	550 Record(s) retrieved
	Record For 5419498 Successfully Edited.
Save Changes	Click on Data Field To Make Changes; Cli the Leftmost Column of Record To Selec

By Status Equals Open

1	LocalStatu	Recd	Paid On	LocalInvoice
	Open	4/1/2002		
	Open	4/2/2002		
	Open	4/4/2002		
	PaidPt	1/25/2002	3/1/2002	Pmt000052

Items marked as Paid in this fashion are still run by the Credits and Deposits Tables, to see
whether the amounts should be deducted from these totals, but no other checks are made. The
Default Payment Method may be a real payment or a credit; since there's no way to tell for sure,
it's assumed to be a true payment.

Any payment can be edited later to correct payment amounts only, or simply deleted and re-
posted to correct any and all values.

Journals

Records for Journals are held in the QuickDOC.MDB database in the **tblJrnls** Table; there's also an associated **tblHoldings** Table (for **Library Holdings**) but the input and edit forms for this table aren't implemented as of May 2002. It is planned at some point to update holdings lists automatically from **SERHOLD**. The list of Journal records is accessible on the **Add/Edit Journals Form**, either from the Menu Bar or from the Title column in either the Borrow or Loan Grids.

Lookup Journal Title

Displaying Journals from the Lookup Menu

Records for Journals can be displayed from the **Lookup** choice on the **Menu Bar**, under Journal Title.
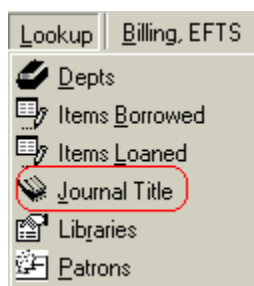
This brings you to the AddEdit Journals Form. Journals can be chosen for editing by using the Search button next to the Title box (for **Journal Title searches**) or the Search button that will appear next to the ISSN box when that box gets focus (for **Journal ISSN searches**).

Searching for a Journal Title

The example below reflects a search when the word "Medical" is typed into the Title box and the Search button is clicked:

Since "Medical" is a fairly common word in our Journal Titles List, it will be wiser to choose some less common word, but even with a fairly long list it is possible to use the scroll bar on the right to scroll down yo the title you want to edit. Double-click on the title you want to move its values to the edit boxes.

Editing Journals

In the case above, we can make such changes as necessary in the record for *Medical Reference Services Quarterly* and then use the **Apply** or **Ok** buttons to save them. The vertical scroll bar at the bottom of the Journal Titles List can be scrolled right to expose the NLM UI and Title Owned columns.

Sorting the Journal Titles List

You can sort the Title, ISSN or NLM UI columns in ascending or descending order by clicking on the header at the top of the column.

To **reset the Journal Titles List** after a search to its full number of entries, click the Clear button and type in another search value.

Deleting Journals

Highlight a Journal Title to delete and click the **Delete Jrnl button** to delete a Journal Title from the Journals Table. If the title has activity in one of the other tables you won't be able to delete it without first assigning its items to another Journal Record using the **Global Title Change button**.

Adding Journal Titles

Journal Titles are added automatically if they are part of a DOCLINE Borrow transaction and are not already in the Journals Table of the QuickDOC.MDB database. They can also be added manually using the Add/Edit Journals Form.

Add Journals

Records for Journals can be added from the **Add New** choice on the **Menu Bar**, under Journal Title.
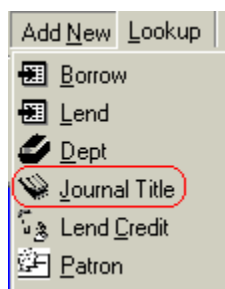
The Add Journals form is the same as the Edit Journals form, except for the **automatic checks for duplicate values in the Title, ISSN and NLMUI text boxes.** After you enter a value in any of these fields, a search is made for matches in the database, in order to prevent duplicate records being added.

After pressing Enter in the Title box, a quick search is made in the database to identify any similar Journal Titles. If one is found it is displayed in the list on the right. You can double-click on that record line to edit that record and abort the add.

A similar search occurs after data is typed in the ISSN box:

You can also use the Search Button next to the ISSN box to do a search on a partial ISSN, in order to check for an earlier entry:

Again, while it's possible to add two records with the same ISSN, it isn't usually recommended, since the whole point of the Journals Table is to ensure discrete, appropriate assignment of transactions to the appropriate Journal Title involved.

Transferring Journal Activity

To transfer activity from one Journal record to another, use the **Global Title Change** button at the bottom of the form. This method can be used for moving activity from any Journal Title record to another, but it's very useful also in removing Monograph Records from the Journals Table that have been added there incorrectly during a DOCLINE Import.

Using Global Title Change to Remove Monographs from tblJrnls

If you discover a monograph title in the list of Journal Titles, you can use the following method to change all Borrow and Loan activity to the **default Monograph record** (usually 9097) and also remove the monograph title from the Journals Table. Use the following steps:

1. First find the monograph record you want to remove, as below, and double-click that entry to put it into the Edit box. Click Global Title Change.

2. Since we want this to be filed as a monograph, we need to choose the record we want to replace the current record with, which in this case is the default monograph record. Enter monograph in the Title Box and press Enter. This gets everything with monograph in the title, including the Default record. Double-click on that first line to choose it.

3. A message box will appear with the values to be changed, from and to:

w of

Search   Title: Monograph

Title Abbrev:

Monograph   H
Practical dental monoc
Monographs in surgica
Genetic psychology m

Global Journal Title Change

After double-clicking the Monograph line, a
Message Box announces what will be changed.

Ready To Globally Change Lend and Borrow Records:

Changing All Items with the current Journal Title National conference on dental public relations
[Jrnl Record Number 6116]
To
New Title Monograph
[New Jrnl Record Number 9097

This will replace the Jrnl
Record Number in all
items with that of the
default Monograph record

OK   Cancel

4. Click Yes to change any instances of record 6116 to the default monograph record.

Add/Edit Journals

Jrnl # 6116   Global changes completed. Old
record can be deleted, if desired

Search   Title: National conference on de

Title Abbrev:

Title Begin/End:

ISSN:

NLMUI:

After the Global Change, we're back at the first
record. Click 'Delete Jrnl' to remove from list.

Apply   Clear Form   New Title

Ok   Cancel   Delete Jrnl

<---   Journal Titles - IS
Title
Monograph
Practical dental monoc
Monographs in surgica
Genetic psychology mc
Monographs of Society
ASHA monographs
Health education mone
Monographien aus den
Monographs in allergy
Monographs in clinical
Monographs in develo
Monographs in human
Monographs in oral sci
Monographs in paedial

Edit Journal Title here, or
in a search value to searc

5. The Global changes have been completed. You can now choose to delete the old
monograph title from the Journals Table (it doesn't affect the title name that's filed with
the item records). Click the Delete Jrnl Button to delete

.
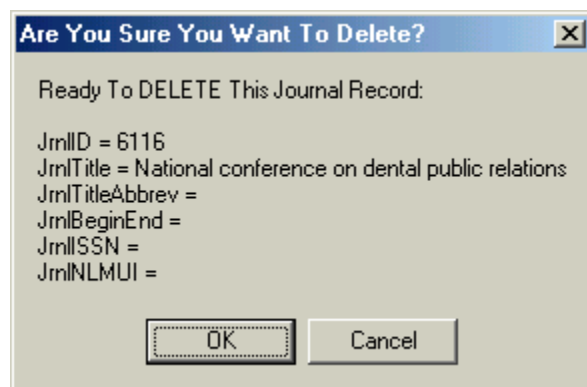
6. One more chance to back out, but click Ok to complete the transaction.

Journals Owned List

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.

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:

Add/Edit Journals

Jrnl #

Search   Title: `Owned`

Title Abbrev:

Title Begin/End:

ISSN:

NLMUI:

Slide the scroll bar to the right to see the Owned column. Double-click any title line to bring values over to edit in boxes at the left of the form.

Owned: ☐

Apply   Clear

<--- Journal Titles - ISSNs - NLMUIs

TitleAbb	BegEnd	ISSN	NLMUI	Owned
Acad Me	64N1,JA	1040-2446	8904605	Yes
		1360-7863	9705773	Yes
AIDS	1N1,MA	0269-9370	8710219	Yes
	1N1,MA	1043-1543	9000367	Yes
AJR Am	128,197	0361-803X	7708173	Yes
Am J Clin	1,1931--	0002-9173	0370470	Yes
Am J Ga	21,1954	0002-9270	0421030	Yes
Am J He	1,1976--	0361-8609	7610369	Yes
Am J Hu	1,1949--	0002-9297	0370475	Yes
Am J Kid	1N1,JUL	0272-6386	8110075	Yes
Am J Me	1,1827-;	0002-9629	0370506	Yes
Am J Me	V. 1- J	0002-9343	0267200	Yes
Am J Ob	1,1920/	0002-9378	0370476	Yes
	1N1,API	0002-9394	0370500	Yes

Retrieved 230 records.

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 <u>not a current subscription</u>.

Add/Edit Journals

Jrnl # `630`

Search   Title: `Am psychologist`

Title Abbrev:

Title Begin/End: `1,1946--`

ISSN: `0003-066X`

NLMUI: `0370521`

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

Owned: ☐

Apply   Clear Form   New Title

Click Apply after each change.

Ok   Cancel   Delete Jrnl

Global Title Change

<--- Journal Titles - ISSNs - NLMUIs

Title	TitleAbb	BegEnd	ISSN
Am J physical medicine	Am J Ph	67N1,FE	0894-9
Am J physiology	Am J Ph	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

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

<--- Journal Titles - ISSNs - NLMUIs

Title	TitleAbb	BegEnd	ISSN
Am J obstetrics gynecc	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

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

Reports are listed under the **Menu Bar item Reports**. Reports are available in separate forms for **Borrowed Items** and **Loaned Items**.
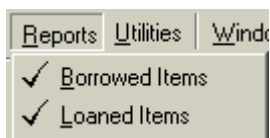
Printing Reports

Print To and Copies Boxes on QuickDOC Report Forms

QuickDOC includes dropdown combo boxes on both the the Lend Reports and Borrow Reports forms for choosing the **Printer to print to** (as well as the **default Print Preview**) and the **number of copies to print**. In most cases this arrangement will be the easiest to use and most convenient.

Windows Print Menu

In some situations, however, access to the full **Windows Print Menu** might be necessary in order to set some specific printer value just for the report to be printed. One such option might be the ability of some printers to **collate reports** with **more than one copy** to be printed. Typically, **collation** means that any report set to print more than one copy will first print the first copy all the way through, then the second copy all the way through, etc. In most cases, this is what you want.

In some cases, though, and the printing of **multiple copies of Invoices** is the obvious example, collation is **not** what you want. Multiple copies of Invoices should stay together, so they can be mailed together.

In order to provide this option, QuickDOC will activate the **Print choice on the File Menu**, in both Lend and Borrow Reports, as well as in their related **Billing, EFTS** and **Local Billing** choices on the **Menu Bar**. If you need to set some specific printer setting, use this method rather than the boxes provided on the QuickDOC Report forms:
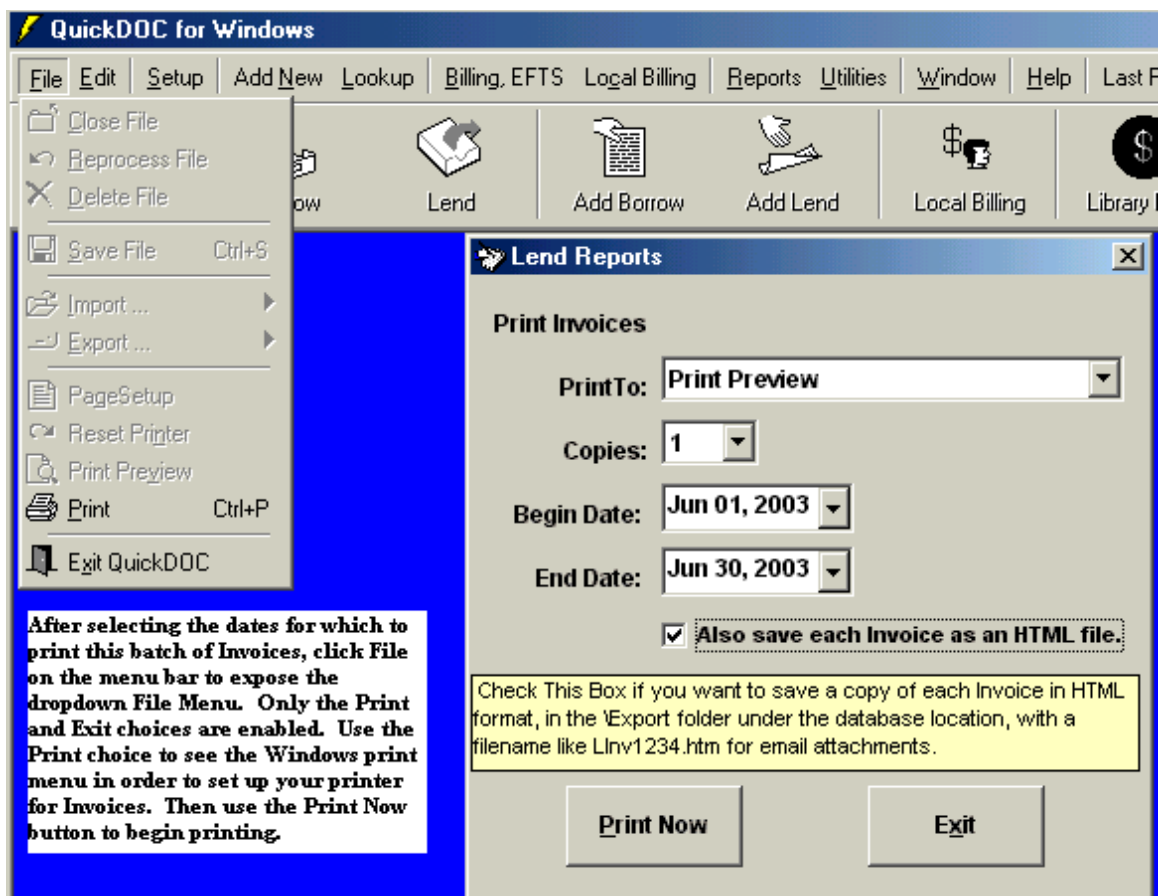
Ignore the choices on the Report menu and click File on the Menu Bar, then Print, to get the **Print Menu**. On the Print Menu, select the **Printer Name** you want to use, the **number of copies** you want to print, and any other **Printer Properties** (such as Collate, for example) that you want to apply to this print job.
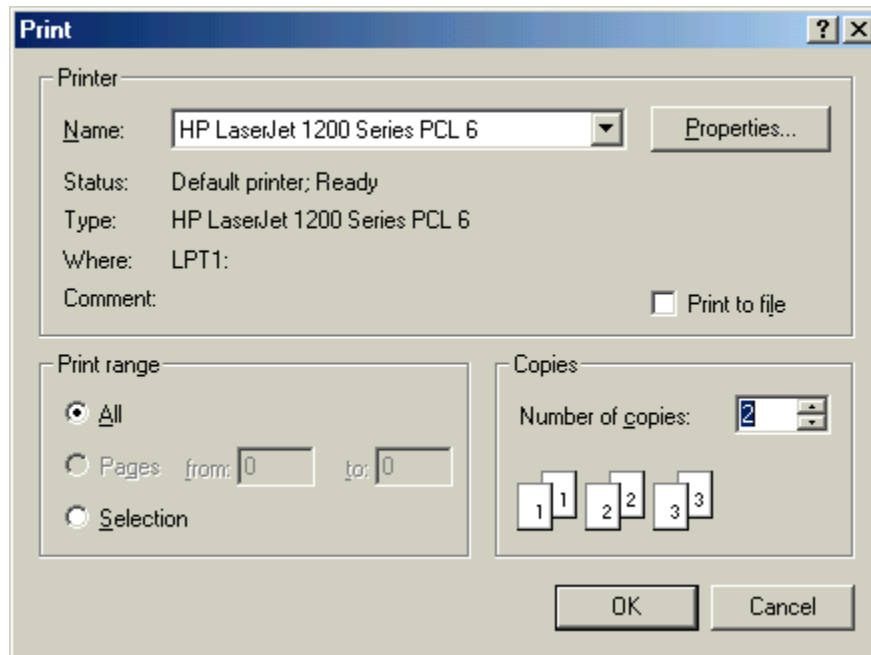
Your Print Menu may look slightly different, depending upon the version of Windows running on your machine and the printer's capabilities. Once the selections are made, click **Ok** to return to the Report Form.
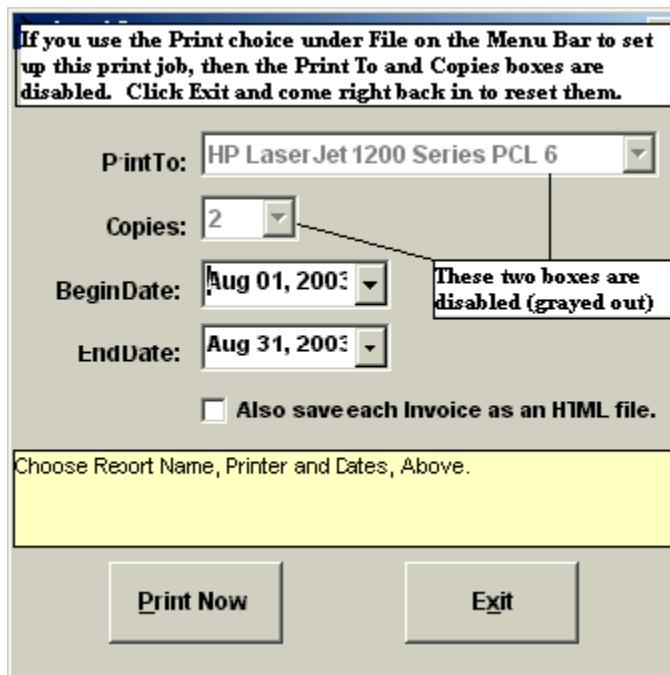
You'll notice that the **Print To** and **Copies** boxes now show your selections made using the Windows Print Menu, but that they are now **disabled** (grayed out). This alerts you to the current settings and reminds you that the changes were made on the Windows Print Form, not this one. The other values, Begin Date, End Date, etc., are still available and can be changed at any time.

If you want to **stop using the Windows Print Menu settings**, first go back to the Print Menu, using the **File, Print** method. Undo any changes you've made just for this report, so that the **Windows Printer defaults** are returned to their normal settings. Click **Ok** to save the Windows

settings, then **Exit** to quit the QuickDOC Report form. When you come back in the Print To and Copies boxes will again be enabled and ready for use.

It's probably a good idea also to get in the habit of revisiting the Windows Print Menu after each report is run and before exiting the QuickDOC Report Form, to avoid leaving the printer at settings that will be an unpleasant surprise when some future report is printed.

Borrow Reports

The **Borrow Reports form** gives choices for Report Name, Printer to print to (including Print Preview), Number of Copies to print, and Dates to include. Print Preview is always a good first choice, to get an idea of how many records will be sent to the printer.

Detailed Borrow Report

There are a number of basic Borrow side reports included in QuickDOC. The first is the **Detailed Borrow Report**, which prints item-level information for each request filled during the period specified.   Columns in the report include: **Lender**, **Request Number**, **Date Received**, **Title**, **Citation** and **Lender Charge**. These will not include Loansome Docs filled in-house. The first line of each Library's activity includes a **list of the Library Groups** to which that Library belongs. The format is as follows:

A subtotal appears at the end of each itemized Lending Library's listing, as in the following, from the University of Alabama at Birmingham:

Each library is subtotaled, and there are Grand Totals listed at the very end of the report for **Total All Items**, **Total Libraries** and **Total Charges**.

Detailed Borrow Report for One Lender

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:
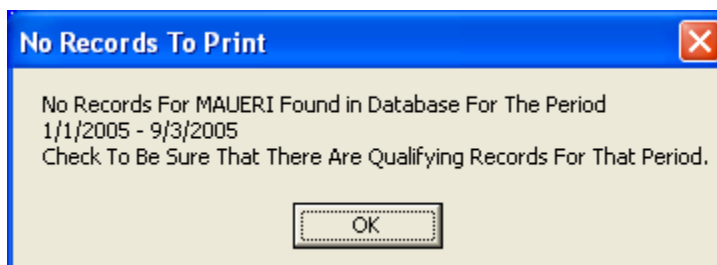
Running the report from the Borrow Item Backfile grid is clearly the best choice. Since there is no **Libr** column in the **Local Billing grid**, there is, therefore, no **Print Lender Rpt** Print Option there, but the other grids make it possible to print individual reports for any Lender.

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:

Click the **Print Lender 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 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.

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:
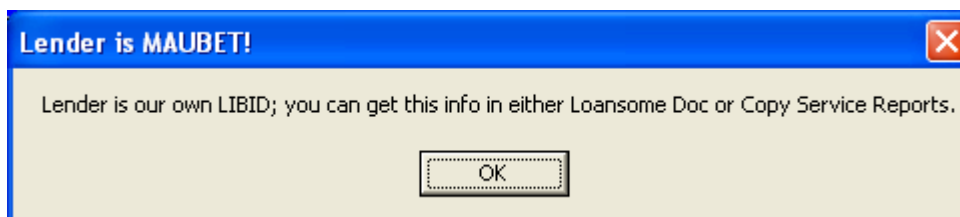
Use the Loansome Doc or Copy Service Reports to get this info.

Summary Borrow Report

The **Summary Borrow Report** lists total activity with each Library during the period in question: total items and the total amount charged.

Detailed Borrow Report (by Patron)

The **Detailed Patron Report** includes a line for each Patron transaction during the period specified. It includes not just ILL activity, but also Copy Service and LOANSOME DOC requests that were filled in-house, so the totals here may be higher than reports for the same period that track only ILL activity. The report is sorted by Patron Name (Last, First), and by Rec'd Date within each Patron. It includes the Patron Status in parentheses after each Patron Name, and indicates the Dept referenced for each transaction.

Charges are those Local Charges that are billed to the Patron. If the item was billed to a Department or Cost Center, or if the Local Charge, itself, was 0.00, then the **Charged As Patron** here will be 0.00. Also included [in brackets] just before the Patron Charge is the amount the Library paid the Lender for that item. These Lender charges are also totalled at the end of each Patron section.

LOANSOME DOC and **Copy Service** items are indicated by an **L** or a **C**, respectively, just to the right of the item number.

The format of the **Detailed Patron Re**port is as follows:

Copy Service Request Number is truncated in Patron, Dept reports

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.

The full number will continue to be printed in the Copy Service Report.

Detailed Borrow Report for One Patron

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.

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).

Summary Borrow Report (by Patron)

The **Summary Patron Report** includes a line for each Patron, along with the Dept and, in parentheses, the **Patron Status**. All transactions during the period specified are sorted by Patron Name, totals for each Patron are cumulated under **Items**; **Lending Library Charges** for each

Patron are shown in the column **Chrg By Lender**; **Local Charges Paid By Dept or Cost Center** are shown in [**Dept Paid**], and actual **Local Charges Paid by Patron** are in the **Charged (as Patron)** column.

The report includes not just ILL activity, but also **Copy Service** and **LOANSOME DOC** requests that were filled in-house, so the totals here may be higher than reports for the same period that track only ILL activity. The **[LD]** and **[Cpy]** columns are subtotals of the Items column on that same line and are included in that item total. The [LD] column includes both in-house LOANSOME DOCs and those filled after referral on DOCLINE.

The Local Charges that were assigned to Departments or Cost Centers aren't included in the Charged (as Patron) Totals, but are shown [in brackets] here. The report is sorted by Patron Name (Last, First), and by Rec'd Date within each Patron. It includes the **Patron Status** in parentheses after each Patron Name, and indicates the **Dept** referenced for each transaction.

Charges are those Local Charges that are **billed to the Patron**. If the item was billed to a Department or Cost Center, or if the Local Charge, itself, was 0.00, then the **Charged As Patron** here will be 0.00.

The format of the **Summary Patron Re**port is as follows:

Detailed Borrow Report (by Dept)

The **Detailed Dept Report** includes a line for each Dept transaction during the period specified. It includes not just ILL activity, but also Copy Service and LOANSOME DOC requests that were filled in-house, so the totals here may be higher than reports for the same period that track only ILL activity. The report is sorted by Dept Abbreviation and by Rec'd Date within each Dept. It includes the Full Department Name (in parentheses) after each Dept Abbreviaton, and indicates the Patron referenced for each transaction.

Charges are those Local Charges that are billed to this Department (or to a Cost Center of this Department). If the item was billed to a Patron, or if the Local Charge, itself, was 0.00, then the **Charged As Dept/ CostCtr** here will be 0.00.

LOANSOME DOC and **Copy Service** items are indicated by an **L** or a **C**, respectively, just to the right of the item number.

The format of the **Detailed Department Report** is as follows:

Detailed Borrow Report (by Dept)
01-Dec-02 to 31-Dec-02

Report sorted by Dept Abbreviation, with Full Name (in parentheses). Patron is indicated for each request.

Only charges specifically assigned to Depts are counted here (Patron payments or Free items will be 0.00

24-Jan-2003   Beth Israel Deaconess Medical Center (01-Dec-02 to 31-Dec-02)   Page 1

Item[LC]Dept/Patron	ReqNo	Date	Title	Citation	Charged As Dept/CostCtr
MED (Dept Of Medicine)			Copy service items show a C here		
1 (C) Tofias, Zachary	8966402	05-Dec-02	1991 J medical ethics	Sep;17(3):138-43	$0.00
2 Tofias, Zachary	8994210	12-Dec-02	1986 Br medical J (Clinical research ed.)	Mar 1;292(6520):596-8	$0.00
3 Tofias, Zachary	8966401	12-Dec-02	1984 J medical ethics	Mar;10(1):27-8	$0.00
4 Tofias, Zachary	8966399	12-Dec-02	1986 Br medical J (Clinical research ed.)	Mar 1;292(6520):596-8	$0.00
Total 4 Items For MED				**Total Charged to MED:**	**$0.00**
NEPH					
1 Sukhatme, Vikas	9038644	13-Dec-02	1990 Cardiovascular drugs therapy / spon	Jan;4 Suppl 1():37-43	$0.00
2 Sukhatme, Vikas	9038645	19-Dec-02	2002 Curr topics in medicinal chemistry.	Jun;2(6):507-28	$0.00
Total 2 Items For NEPH			Subtotals for each Dept.	**Total Charged to NEPH:**	**$0.00**
NURS (Nursing Adm.)					
1 Folcarelli, Pat	8945123	10-Dec-02	1995 Int J nursing practice	Nov;1(1):68-9	$0.00
2 Folcarelli, Pat	8945122	10-Dec-02	1992 J professional nursing	Jul-Aug;8(4):202	$0.00
Total 2 Items For NURS				**Total Charged to NURS:**	**$0.00**
OBGY					
1 Richardson, Martha (9024475		12-Dec-02	2001 Ultrasound in obstetrics gynecology	Mar;17(3):191-6	$0.00
2 Richardson, Martha (9024476		13-Dec-02	2001 J ultrasound in medicine	Oct;20(10):1065-9	$0.00
Total 2 Items For OBGY				**Total Charged to OBGY:**	**$0.00**
RAD			LOANSOME DOC items show an L here		
1 (L) Odom, Claire	8945055	04-Dec-02	2002 AJNR. Am J neuroradiology	Jun-Jul;23(6):995-1002	$0.00
Total 1 Items For RAD		Grand Totals, and L and C Totals, are below.		**Total Charged to RAD:**	**$0.00**

TOTAL ALL ITEMS: 11   **TOTAL DEPTS: 5**   **TOTAL ALL CHARGES:**   **$0.00**
[L = 1 LD item(s); C = 1 Copy Service item(s)]   [Includes ONLY Charges actually invoiced or paid by Dept/Cost Center]

Summary Borrow Report (by Dept)

The **Summary Dept Report** includes a line for each Dept and, in parentheses, the **Full Dept Name**, if any is registered for that Dept. All transactions during the period specified are sorted by Dept, totals for each Dept are cumulated under **Items**; **Lending Library Charges** for each Dept are shown in the column **Chrg By Lender**; **Local Charges Paid By Patron** are shown in [**Patron Paid**], and actual **Local Charges Paid by Department** are in the **Charged (as Dept)** column.

The report includes not just ILL activity, but also **Copy Service** and **LOANSOME DOC** requests that were filled in-house, so the totals here may be higher than reports for the same period that track only ILL activity. The **[LD]** and **[Cpy]** columns are subtotals of the Items column on that same line and are included in that item total. The [LD] column includes both in-house LOANSOME DOCs and those filled after referral on DOCLINE.

The Local Charges that were assigned to Patrons aren't included in the Charged (as Dept) Totals, but are shown [in brackets] under [**Patron Paid**] here. The report is sorted by Dept Abbreviation. It includes the **Full Dept Name** in parentheses after each Dept Name, and indicates the **Dept** referenced for each transaction.

Charges are those Local Dept/Cost Ctr charges that are billed to this Department (or to a Cost Center of this Department). If the item was billed to a Patron, or if the Local Charge, itself, was 0.00, then the **Charged As Dept/CostCtr** here will be 0.00.

The format of the **Summary Department Report** is as follows:

Journals Borrowed (Summary) Report

The **Journals Borrowed (Summary) Report** lists each Journal Title borrowed during the period in question, along with the number of times it was loaned and the ISSN.

The left hand column is counting the titles as they are printed. At the end of the report is a general total:

Journals Borrowed (Full) Report

The **Journals Borrowed (Full) Report** lists each Journal Title borrowed during the period in question, but also includes a line for each item, including the Lender, Year of publication and the Patron Name. It generates a list of ALL journals borrowed, not just those subject to Copyright,

sorted by # Borrows, most to least. Within each Journal Title, items are **sorted by Patron Name**, so that items borrowed for a single patron will be grouped together. This report can also be configured to print only those titles with a certain number of times borrowed, so that only those titles you borrowed most often will be included.

Print Most Borrowed Journal Titles

An input box will pop up after you've selected the Journals Borrowed (Full) Report to ask at which number of Borrows you want to cut off the printout:
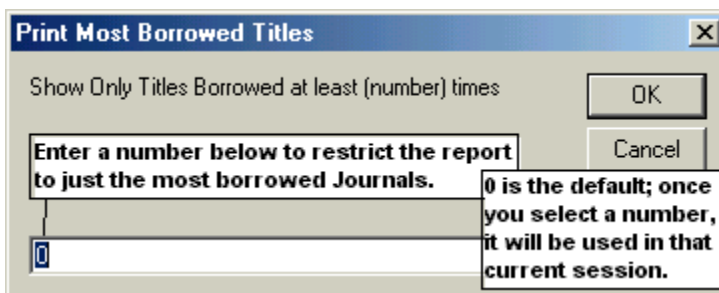
```
Print Most Borrowed Titles                          [x]

  Show Only Titles Borrowed at least (number) times      [ OK ]

  Enter a number below to restrict the report            [ Cancel ]
  to just the most borrowed Journals.          0 is the default; once
  ┌─────────────────────────────────┐         you select a number,
  │                                 │         it will be used in that
  ┌─────────────────────────────────┐         current session.
  │0                                │
  └─────────────────────────────────┘
```

If you leave it at 0 (or enter 1) it will print all items. To see all journals borrowed five or more times during the year enter 5. The report will be printed with the most-borrowed titles first, down to the last title borrowed 5 or more times.

Journals Borrowed (Full)
(Includes All Journals Borrowed at least 5 times, sorted by # of Borrows, then by Patron, with Lender In]
01-Jan-02 to 31-Oct-02

23-Nov-2002   Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Oct-02)   Page 1

Journal#	# Borrowed	Lender	Year	Jrnl Title	Patron
1	1	OHUCHE	1996	Leukemia lymphoma	Bassal, Mylene Angel
	2	OHUCHE	1997		Bassal, Mylene Angel
	3	OHUCHE	2001		Daly, Jay
	4	OHUCHE	1998		Liang, Xayuan
	5	NSCQHE	1991		Liang, Xayuan
	6	OHUCHE	1999		Trobaugh, Angela
	7	OHUCHE	1999		Trobaugh, Angela
	8	OHUCHE	1999		Trobaugh, Angela
2	1	COUZAM	1991	Am J surgical pathology	Janik, Jr., Joe
	2	COUDGC	1999		Liang, Xayuan
	3	COUDGC	2001		Mierau, Gary
	4	COUDGC	2001		Mierau, Gary
	5	COUUFC	2001		Mierau, Gary
	6	COUDGC	1999		O'Connor, Judith
	7	COUDGC	1985		O'Connor, Judith
3	1	COULTR	2001	Am J hospice palliative care	English, Nancy
	2	COULTR	2001		Pearson, Joanne
	3	COULTR	1999		Pearson, Joanne
	4	COUVHD	1993		Pearson, Joanne
	5	COULTR	2000		Pearson, Joanne
	6	COULTR	2000		Pearson, Joanne

This report can be fairly lengthy, if you don't restrict it to most borrowed titles, with a line for each item loaned. The individual numbers in the second column (**# Borrowed**) provide the subtotal for each Journal during the printout. This report also includes a total at the end of the report:

```
23-Nov-2002              Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Oct-02)                    Page 2
Journal#        # Borrowed   Lender     Year  Jrnl Title                              Patron
    9               2        COUDGC     2000  Seminars in neurology                   Riffe, Stacey
                    3        COUDGC     2001                                          Sokol, Ron
                    4        COUDMS     2000                                          Strunc, Michael
                    5        COUDGC     2001                                          White, Andrew

TOTAL ALL ITEMS: 53                            TOTAL JRNLS:   9
```

Copyright Report (US - CCC)

The **Copyright Report (US - CCC)** generates a list of ONLY those items that currently fall outside of the U.S. CONTU Guidelines for copyright compliance.

In general, the **CONTU Guidelines** require reporting if:

1. This Journal Article Borrowed is less than 5 years old;

2. There have been 5 or more previous Borrows of this type from this journal this year;

3. This is a Title for which you do not have a current subscription; *and I would also add:*

4. *You have not already paid a royalty through a third-party at the time of ordering.*

The Copyright Report (US – CCC) therefore prints only Journal items for which a Copyright Charge might be due, usually payable through the **Copyright Clearance Center** (the CCC of the report title).

This report therefore excludes borrowed articles from Journal Titles that provided fewer than 6 articles in the calendar year specified; it also excludes items published earlier than 5 years before the calendar year in question; and it also excludes requests marked **CCL** (the U.S. standard that tells the Lender that this request conforms to the Copyright Law, generally because the item is greater than 5 years old, rather than the CONTU Guidelines, **CCG**, which generally means the item borrowed is within the 5 year period), because this is a way to gather any number of exceptions (including "We own it!" and "We already paid the royalty!") in a single value.

It also checks the Publication Date, and excludes anything older than 5 years before the Begin Date of the report, whether or not that item is marked CCL or CCG.

The report also excludes **Loansome Doc requests filled in-house** (i.e., Loansome Doc requests where the Lending Library is the same as the Borrowing Library), since this activity is more like a **Copy Service** than **Interlibrary Loan**. Of course there are **Fair Use** issues here, etc., but that is outside the scope of this discussion.

The **current subscription** distinction, as mentioned above in the third bullet of the CONTU Guidelines discussion, is a bit more complicated. At some point, we'll be able to check Journal Titles for current subscriptions directly in QuickDOC.MDB; the fields are there but the enabling code is not. So, for the time being, use the **DOCLINE CC Field** or the **CC Field in the Add Borrow form** for non-DOCLINE requests, to register your own compliance with the Guidelines, by choosing CCL instead of CCG when the Journal in question, even if within the 5 year period, is one for which you have a subscription. The QuickDOC Copyright Report (US – CCC) will then skip that item as it makes its calculations.

Fnally, in the case of items borrowed from Lenders who include the **Royalty Charge** as a part of the Loan Charge (such as **CISTI**, or any of the **commercial document delivery providers**), mark these records **CCL** so that they will not be included in the Copyright Report (US – CCC).

If you enter an **incorrect CC value** at the time that any item is ordered, you can change it in the **BorrBibCopyright** field that is available on any Borrow Grid by clicking the + sign at the left of the appropriate row.

The Copyright Report (US – CCC) includes # of **pages**, Year, Jrnl Title (ISSN), and the citation. As the subtitle suggests, **only** those items not excluded by time or CCL or the **Rule of 5** will

appear in the report. This is a conservative estimate, so that if your Start Date is anywhere in 2001 (as it is below), QuickDOC will assign the **CCL cutoff date** to the earliest it could have been (in the case below, a report date of 1/1/2001 yields a cutoff date of December 31, 1995 --- **Anything before that COULD <u>NOT</u> BE within the 5-year period**) and will include any items after that that meet the other criteria. So the Publication Years within that constraint are 2000, 1999, 1998, 1997, 1996 (with 2001 included by definition, as it progresses).

Of course, this floating 5-Year period will change during the year in question, so that something borrowed in January, 2001 will be properly included, while something else, borrowed at the end of the year, might be included in the total while it should have been excluded, instead. In these cases, use the CCL Copyright value to exclude items that would otherwise be included in the general Copyright Report (US – CCC). You can use the Copyright Report (All Items), which is the next report described below, to perform a final check for intra-year items that may be excluded under CONTU because the publication date/month within year 5 (1996 in the case above) is earlier than the date/month when the item was borrowed during this year.

This report prints **ONLY those items that should be reported to the Copyright Clearance Center** (**CCC**) in one of their reports,

Copyright Report (US - CCC)
(US CONTU Guidelines: Jrnl Borrows > 5/year/title for articles published after 1995 and CCG)
01-Jan-01 to 31-Oct-01

19-Apr-2002			Beth Israel Deaconess Medical Center (01-Jan-01 to 31-Oct-01)		Page 1
Journal#	Article	#Pgs	Year	Jrnl Title (ISSN)	Citation
1	1	6	1999	Acta orthopaedica Belgica (0001-6462)	Dec;65(4):418-23
	2	5	1999		65 Suppl 1:57-61
2	1	4	2001	Allergy asthma proceedings (1088-5412)	Mar-Apr;22(2):71-4
	2	3	2000		Nov-Dec;21(6):377-9
3	1	6	1996	Ann epidemiology (1047-2797)	Mar;6(2):154-9
	2	12	1998		May;8(4):250-61
4	1	4	2000	Arch disease in childhood. Fetal neonata (1359-2998)	Sep;83(2):F97-100
	2	5	2000		Sep;83(2):F86-90
	3	2	2000		May;82(3):F248-9

At the end of the Copyright Report (US – CCC) will be the Grand totals:

13	1	7	2001	Obesity research (1071-7323)	Jul;9(7):394-400
	2	8	1999		Jan;7(1):1-8
	3	8	1999		May;7(3):265-72
14	1	14	2000	Progress in pediatric cardiology (1058-9813)	May 1;11(1):25-38
	2	9	2000		May 1;11(1):55-63
	3	15	2000		Jun 1;11(2):115-129
15	1	3	1998	Ultrasound in obstetrics gynecology (0960-7692)	Jun;11(6):456-8
TOTAL ALL ITEMS: 29				**TOTAL JRNLS: 15**	**TOTAL PAGES: 232**

This summary is the total of the U.S. CCC Report. Before generating a final report for CCC, first print the Copyright Report (All Items) for all Journals borrowed 6 times or more. Use this printout to check for Journals Owned, or Items already paid for, or Borrows that pre-date the five year CONTU Guidelines checkoff within the year. Change these to CCL if you don't want them included in the Copyright Report (US – CCC). Change any other values that may be exposed as incorrect wihtin this report. Then print the final CCC Report.

Copyright Report (All Items)

The **Copyright Report (All Items)** generates a list of ALL journals borrowed, not just those subject to Copyright, **sorted by # Borrows**, most to least. It can also be told to print only those titles with a certain number of times borrowed, so that only those titles you borrowed most often will be included. Because the purpose of this report is to provide a mechanism for **fine-tuning Copyright data** before preparing the official CCC Copyright Report, it also includes the Request Number and Date Received, to facilitate editing in the actual request, if necessary. No Patron Information appears on this report, but it does appear on the Journals Borrowed (Full).

Print Most Borrowed Titles

An input box will pop up after you've selected the Copyright Report (All Items) to ask at which number of Borrows you want to cut off the printout:

If you leave it at 0 (or enter 1) it will print all items. To see all journals borrowed five or more times during the year enter 5. The report will be printed with the most-borrowed titles first, down to the last title borrowed 5 or more times.

This report will also total items, journals and pages at the end:

```
30-Oct-2002              Beth Israel Deaconess Medical Center  (01-Jan-02 to 30-Sep-02)                    Page 2
Journal# [Req#]  # Borrowed  CC  #Pgs  Year  Jrnl Title (ISSN)                       Citation          Rec'd
   9   [5412620]      4       G    8    2000  Seminars in neurology  (0271-8235)      20(2):225-32     25-Jan-02
       [5427061]      5           12    1998                                         18(2):185-196    25-Jan-02

TOTAL ALL ITEMS: 51                      TOTAL JRNLS:   9              TOTAL PAGES:   336
```

as well as on the Form, itself (most QuickDOC Reports will do this as well).

Copyright Reporting Strategies

As a general rule, the method for preparing the US - CCC final report for the year might be as follows:

1. **Print the US-CCC Report** for the year in question.

2. **Print the All Items Report** for the same year, including only titles borrowed 6 or more times.

3. Using titles that show on the original US-CCC Report (#1), check the full list of borrows on the All Items Report to make sure that any **CCGs** that should be **CCLs** are fixed.

4. Also check that the 5 year plus CCL rule has been followed (QuickDOC will change CCGs to CCLs if it can determine that the date of the issue is earlier than the date of the request in the issue year of this-year-minus-5 (Jan 1999 is CCL in Feb 2004 while March 1999 is not).

5. Make sure that any journal title to which you have a **current (or on order) subscription** have CCL on all their items.

6. Make any changes directly in the item records in QuickDOC; then

7. Print out the **final US-CCC Report**, to use in reporting to the **Copyright Clearance Center**.

Compute Totals (Borrowing) Report

The **Compute Totals (Borrowing) Report** provides a quick snapshot of Borrowing activity in various categories, such as **Item Source**, **Delivery Method**, **Type of Item**, etc. It also calculates percentages of activity during the period specified, and computes an **Average Charge per Item** for that period, along with Turnaround Time for items sent via various systems, Delivery Methods, Item Types, etc.

This report also lists activity in a **Copy Service**, if you have one, and Copy Service items (along with Loansome Docs filled within your Library---which aren't counted as Borrows in some cases, such as Copyright Reports and the report here of Referral Reasons) are broken out separately and won't be included in the totals.

The Compute Totals Report also gives Totals and Averages for Delivery Methods, Source of Request, Copy Service and various **Loansome Doc Activity Reports**. It gives the percentage of items on each Source that were delivered electronically. Totals for **Referral Reasons** are listed at the end of this one-page report. The report also gives a subtotal within each Source if any of those items were monographs or audio-visuals.

The top Compute Totals screen appears as follows:

The first page of Compute Totals (Borrowing) also now shows a report of the methods of **Payments to Lenders** for the period, along with **total charges** allocated to each **payment type**, with categories for **EFTS**, **IFM**. **Invoice/Other, Not Yet Paid** and **Free**. The report also gives a subtotal within each Source if any of those items were **Monographs, Journals, E-Journals** or **audio-visuals**.

	Physical	E-Journals included by type	Electronic	
TOTAL Physical & Electronic FILLS:	109		56	165
% of Totals:	66.06%		33.94%	

By Type: Jrnls:	161	E-Jrnls: 1	Monographs: 3	AV:	Originals:	Copies: 165	Rush:
% of Totals:	97.58%	0.61%	1.82%			100.00%	

TOTAL ITEMS:	Rec'd	Unsuccessful	Outstanding	Grand Total
	165	21	9	195
% of Totals:	84.62%	10.77%	4.62%	

PAYMENTS Items Paid Via:		EFTS	IFM	Invoice/Other	Not Yet Paid	Free
		43		17	32	73
Est $ By Method:		$480.00		$158.00	$327.00	$0.00
% of Rec'd Items:		26.06%		10.30%	19.39%	44.24%
TOTAL Cost:	$965.00			Avg Cost/Item: $5.85		

QuickDOC also adds computation of **Turnaround Time by Delivery Method**, **Delivery Type** and **Item Type** on the first page of the Report:

Fax		New rows for computing average # Turnaround Days by Delivery Method, Delivery Type and Item Type are added in version 2.1.2 on the first page of the Compute Totals (Borrowing) Report (in addition to Source).						
Other								
Copy Service								
TOTAL REC'D:	329	56		18	29	129	97	329	3.9
% of Totals:		17.02%		5.47%	8.81%	39.21%	29.48%	329	
Avg # Days:		7.		2.1	2.4	3.1	3.8		

LOANSOME DOC Activity:	Total LD Items:	4	% of All LD:	100.00%	
	Total LD Rec'd:	4		100.00%	4
	Filled by MAUBET:	4		100.00%	4
	Filled on DOCLINE:			0.00%	
	Not Filled:			0.00%	

	Physical	Electronic	
TOTAL Physical & Electronic FILLS:	56	273	329
% of Totals:	17.02%	82.98%	
Avg # Days:	7.	3.2	

By Type: Jrnls:	324	E-Jrnls:	Monographs: 5	AV:	Originals: 1	Copies: 328	Rush:
% of Totals:	98.48%		1.52%		0.30%	99.70%	
Avg # Days:	3.9		4.2		6.	3.9	

In addition, the Borrow report also lists **Referral Reasons** for requests, when they were entered, along with the percentage of all requests the listed Reason represented. Totals for Referral Reasons won't include any Copy Service items or Loansome Doc items that were filled from your collection.

Report on Referral Reasons as indicated when the request was sent:

[Totals below do not include Copy Service OR Loansome Doc items filled by MAUBET.]

REFERRAL REASONS:	Code	Description	# of Items	% of Total Req.
	BDY	At Bindery	7	1.00%
	LAC	Lacking (Issue/Vol)	99	14.14%
	NOT	Not owned (Title)	562	80.29%
	NYR	Not yet received	1	0.14%
	OTH	Other	2	0.29%
		No Ref Reason	29	4.14%
		Total for Items Sent Beyond MAUBET:	700	100.00%

These can be useful for **Collection Development** reports and planning.

Patron Status Report

The **Patron Status Report** provides a quick snapshot of Borrowing activity by the Status of the Patron. It also tracks the **Local Delivery Method** used to convey the item to the Patron, and computes an **Average Turnaround Time** for items by **Patron Status Code**.

This report appears at the top of Page 2 in the Compute Totals (Borrowing) Report:

Patron Status Report (using Local Delivery to Patron Methods)

Patron Status	TOTAL ITEMS	Status % Total	Physical Delivery:			Inter-office	FedEx	Other	Electronic Delivery:						Turnaround
			Mail	PkUp	Msgr				Email(pdf)	(tiff)	Fax	Web (pdf)	(tiff)		Avg # Days
No Status Assigned	87	52.73%		84	1			1						1	5.7
AHP															
DD															
FAC															
FELLOW	10	6.06%		9		1									6.
FLAG															
GRAD															
MD	62	37.58%	1	48					5	2	1	4	1		4.1
NURS	6	3.64%		5									1		6.8
OTH															
RES															
STAFF															
UND															

> The Status, Suffix and Purpose Reports track the LOCAL Delivery Method---how it got to the patron.

Patron Suffix Report

Also on Page 2 of Compute Totals (Borrowing) is the **Patron Suffix Report**, which provides a snapshot of Borrowing activity by the type of Patron as revealed in the suffix (M.D., D.D.S., M.L.S., etc). It also tracks the **Local Delivery Method** used to convey the item to the Patron, by Suffix value, during the period specified, and computes an **Average Turnaround Time** for items by **Patron Suffix Value**:

Activity by Patron Suffix   Patron Suffix Report (using Local Delivery to Patron Methods)

Patron Suffix	TOTAL ITEMS	Suffix % Total	Physical Delivery:			Inter-office	FedEx	Other	Electronic Delivery:						Turnaround
			Mail	PkUp	Msgr				Email(pdf)	(tiff)	Fax	Web (pdf)	(tiff)		Avg # Days
No Suffix	87	52.73%		84	1			1						1	5.7
D.D.S.															
D.M.D.															
DNSC															
L.P.N.															
LiCSW	4	2.42%		3									1		6.8
M.D.	54	32.73%	1	41					5	1	1	4	1		4.5
M.L.S.															
M.S.															
M.S.L.S.															
M.S.W.															
Ph.D.	18	10.91%		16		1			1						4.2
Pharm.D.															
R.D.															
R.N.	2	1.21%		2											7.
R.Ph.															
R.R.T.															

> The Status, Suffix and Purpose Reports track the LOCAL Delivery Method---how it got to the patron.

Purpose of Request Report

After the Patron Suffix Report on Page 2 of Compute Totals (Borrowing) is the **Purpose of Request Report**, which provides a snapshot of Borrowing activity by the purpose of request: Education, Grant-funded research, Other, Patient Care or Research. It also tracks the **Local Delivery Method** used to convey the item to the Patron, by purpose, during the period specified, and computes the **Average Turnaround Time** for items by **Purpose Code**. The Totals row at the bottom of this page reflects the Local Delivery Method Totals for the period specified.

```
          Purpose of Request Report  (using Local Delivery to Patron Methods)

Patron      TOTAL   Purpose   Physical Delivery:  Inter-                    Electronic Delivery:              Turnaround
Purpose     ITEMS   % Total   Mail  PkUp  Msgr  office  FedEx Other Email(pdf) (tiff)  Fax  Web (pdf) (tiff)  Avg # Days
No Purpose   161    97.58%     1    146                         1      5      1     1      4     2      5.2
EDU
GRA           2      1.21%                       1                      1                              3.
OTH
 PC
RES           2      1.21%                1                                                     1     2.5

Totals:      165                 1    146    1    1           1      5      2     1      4     3
% of Totals:                  0.61% 88.48% 0.61% 0.61%      0.61% 3.03% 1.21% 0.61%  2.42% 1.82%
```

The Purpose Report tracks activity by purpose of request. Not much used at present, above. Also gives local del meth totals.

Library Group Report – By Del Method (Borrowing)

The **Library Group Report – By Delivery Method (Borrowing)** is found at the top of the **third page (or later) of the Compute Totals (Borrowing) Report**. It provides a breakdown of activity on the Borrow side **by Library Group** of the Lending Library. Since a single Library may belong to more than one Group, the Totals here may not match the total number of borrowed items for the period. The report breaks activity down by **Delivery Method** and gives the percentage of items filled for each Library Group that were delivered electronically, the percentage of activity with each Library Group within all Groups, and the average turnaround time by Library Group.

```
6-Jan-2003              Beth Israel Deaconess Medical Center  (01-Jan-02 to 31-Dec-02)                    Page 3

                          Library Group Report - By Del Method (Borrowing)

Library      TOTAL   Group    Physical Delivery:  (Mono/              Electronic Delivery:     %   Item Sent To:   Turnaround
Group        ITEMS   % Total   Mail PickUp  Other A/V)  Web   Ariel  Email     Fax  Elect  Library Patron  Avg # Days
OUT$          28    12.90%     18            (2)                              7     3   36%    28              5.8
OUT
CELLS         31    14.29%     22                             1     3     5   29%    31              4.2
 MA           59    27.19%     30                                  12    17   49%    59              2.3
 R8$          24    11.06%     18                                   4     2   25%    24              6.3
 R1$          19     8.76%     17            (1)                     2        11%    19              7.9
 R8            7     3.23%      6                             1           14%     7              7.4
MA$            7     3.23%      7                                              7              8.6
BBLC          21     9.68%      8                                   9     4   62%    21              2.2
BBLFAX        15     6.91%      7                                        8    53%    15               .9
NLM
 R1            2     0.92%      2                                              2              9.5
MASSFAX        4     1.84%      1                                   2     1   75%     4               .3

Total in Groups: 217           136                           2    39    40         217
% of Totals:                 62.67%                        0.92% 17.97% 18.43%

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]

[There were 168 Items not filled in-house (i.e., not by MAUBET). 22 of these were filled by Lenders with no assigned Library Group.]
```

If there are loans to Libraries that have not been assigned to a Library Group, the number of those items is listed at the end of the report.

Library Group Report - By Source (Borrowing)

The **Library Group Report – By Source (Borrowing)** is found at the bottom of the **third page (or later) of the Compute Totals (Borrowing) Report**. It provides a breakdown of activity on the Borrow side **by Source and Library Group** of the Lending Library. Since a single Library may belong to more than one Group, the Totals here may not match the total number of borrowed items for the period. The report breaks Group activity out by Source used, including: DOCLINE, LOANSOME DOC, OCLC, RLIN, Phone, Fax, Mail and Other. Item payment methods (broken out by EFTS, IFM and non-Electronic methods---typically, Invoices, Coupons, Deposit Accounts, Credits, etc.) are also listed by Group.

```
                        Library Group Report - By Source (Borrowing)

Library      TOTAL      Source:                                              Item Payment Via:
Group        ITEMS      DOCLINE  LDOC  OCLC  RLIN Phone  Fax  Mail  Other    EFTS   IFM  Other
OUT$          28          21      5           1                      1         6           13
OUT
CELLS         31          28      2     1
 MA           59          52      3     1          1    1            1
R8$           24          20      4                                           15
R1$           19          19                                                  16
 R8            7           7
MA$            7           7                                                   2
BBLC          21          18      1                1    1
BBLFAX        15          14                                         1
NLM           17          13      3                                  1               12
 R1            2           2
MASSFAX        4           3      1

Total in Groups:  234      204     19    2     1    2    2           4        39          25
% of Groups Totals:       87.18%  8.12% 0.85% 0.43% 0.85% 0.85%     1.71%    16.67%      10.68%

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]
```

Loansome Doc Filled In-House Report

The **Loansome Doc Filled In-House Report** lists each item filled for a Loansome Doc Patron by your library. These items are not included in any of the other reports, except for Compute Totals and the various Patron and Dept Detailed and Summary Reports (where they are included along with the LDs received from other libraries, but there's no distinction between those filled in-house and those received via ILL). This is an itemized list of all your fills for the period, with Patron Names, and including No Charge items (which would not appear on Patron Bills). The format is almost identical to the Detailed Borrow Report, except that the LD Patron appears in the Lender column, the Charge referred to is the Local Charge, and the items are sorted by Patron Name within the report (like the Detailed Borrow Report, there is also a Total at the end of the printout):

```
                        Loansome Doc Filled In-House
                             01-Jan-02 to 15-Apr-02


15-Jun-2002              Beth Israel Deaconess Medical Center  (01-Jan-02 to 15-Apr-02)          Page 1
Item   LD Patron   ReqNo       Date     Title                           Citation              Local Chrg

   1   Daly, Jay   6812249   15-Apr-02  2001 Canadian J community mental health  Winter;(3 Suppl):41-52   $4.00
   2   Stevenson,  69944058  15-Apr-02  2000 Supportive care in cancer  May;8(3):215-22          $4.00
Total 2 Items From Beth Israel Deaconess Medical Center           Total Charged By MAUBET:       $8.00

TOTAL ALL ITEMS: 2              TOTAL LIBRARIES:  1              TOTAL ALL CHARGES:       $8.00
```

Copy Service Report (By Patron)

The **Copy Service Report (By Patron)** lists each item filled for a Copy Service run by your library. These items are not included in any of the other reports, except for a total in Compute Totals. This is an itemized list of all your jobs for the period, with Patron Names, and including the **number of pages** for each copy item. The format is almost identical to the Loansome Doc Filled In-House Report, except for the column with the calculated number of pages.

In some earlier QuickDOC versions, 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, QuickDOC will currently allow 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) sorts first by LIBID, then by Patron, then by Date Received, as illustrated below:

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-to-Library level, only on the Local Patron or Department level, if you do indeed charge your Patrons, Departments or Cost Centers for Copy Service work.

List of Patron (or Dept) Invoices Outstanding Report

This is also available on the Reports, Borrowed Items Menu, as well as the Local Billing Menu and includes all invoices generated during the period specified that have not been paid, or have received only partial payment.

The Local Billing Menu Bar choice shows a choice for both **Patron Invoices Outstanding** and **Dept Invoices Outstanding** (which includes Cost Center Reports).

Lists of Invoices Outstanding include all invoices generated during the period specified that have not been paid, or have received only partial payment. The Patron List has the following format:

The Dept and Cost Center List is the same, but without the Patron Last Name, since the Dept Abbreviation is embedded in the Invoice Number itself:

List of Dept/Cost Center Invoices Outstanding
01-Jan-03 to 28-Feb-03

Invoices can be reprinted by searching for the **Inv No.** in the Local Billing Grid and clicking into the **Local Invoice column**

12-Feb-2003		Beth Israel Deaconess Medical Center (01-Jan-03 to 28-Feb-03)				Page 1
Inv #	Invoice Date	Invoice No.	Inv Total	Paid	Paid Date	Balance
1	07-Feb-03	DBWEL 0001	$26.00			$26.00
2	07-Feb-03	DNEPH 0002	$16.00			$16.00
Totals for 07-Feb-03: 2			**$42.00**			**Balance: $42.00**
TOTAL INVOICES: 2		**TOTAL INVOICED: $42.00**				**Balance: $42.00**

This list can be used to reprint a second notice for selected invoices. A more automated process for generating second notices is still planned for some time in the future.

EFTS Activity Report

EFTS Activity Report
01-Jul-04 to 19-Mar-05

Your first EFTS Activity Report (before you've added any Deposits) will look much like this.

The Forward line aggregates all Added and Used for items earlier than the start date.

19-Mar-2005		Beth Israel Deaconess Medical Center EFTS Activity (Started Tracking on 01-Jul-04)									Page 1
Date	Item ID	Acct No.	Added	Used	Balance	Date	Item ID	Acct No.	Added	Used	Balance

The table being summarized appears at the head of each column.

--- EFTS Acct: Added, Used, SrvChg & Redist., from tblBorrowDeposits ---   --- EFTS Acct: Added, Used, SrvChg & Redist., from tblBorrowDeposits ---

Date	Item ID	Acct No.	Added	Used	Balance	Date	Item ID	Acct No.	Added	Used	Balance
01-Jul-04	Borrow Deposits Fwd..		$141.91	$0.00	$141.91	23-Nov-04	14460984	Dep000001		$9.00	-$456.09
01-Jul-04	13064501	Dep000001		$11.00	$130.91		14569320	Dep000001		$9.00	
	13064503	Dep000001		$11.00			14570746	Dep000001		$9.00	
	13064504	Dep000001		$11.00			14612182	Dep000001		$9.00	
	13064505	Dep000001		$11.00			14647085	Dep000001		$9.00	
	13064507	Dep000001		$11.00			14647168	Dep000001		$9.00	
	13064778	Dep000001		$11.00			14666402	Dep000001		$9.00	
	13064779	Dep000001		$11.00			14710532	Dep000001		$9.00	
	13079655	Dep000001		$11.00			14727762	Dep000001		$9.00	
	13747969	Dep000001		$11.00			14792874	Dep000001		$9.00	
	13760741	Dep000001		$11.00			14813820	Dep000001		$9.00	
	13956726	Dep000001		$11.00			14813822	Dep000001		$9.00	
	13956727	Dep000001		$11.00			14813823	Dep000001		$9.00	
	14080670	Dep000001					14892315	Dep000001		$9.00	
01-Jul-04	14361989	Dep000001			-$21.09		14975130	Dep000001	$11.00		
23-Jul-04	13566256	Dep000001			-$30.09		15055275	Dep000001		$9.00	
	13631050	Dep000001					15082270	Dep000001		$9.00	
	13631051	Dep000001									
	13631139	Dep000001		$9.00							
	13631140	Dep000001		$9.00							

Dep000001 is the default acct no. for EFTS charges that have no deposit to charge against

Balances print whenever there is a change of dates, as well as at the head of columns.

Items are sorted by Date, and then by Item ID (usually a Request Number) within each date. In most cases this should permit easy identification of items paid from a particular EFTS Deposit payment.

The EFTS Activity Report is meant to provide an up-to-the-minute snapshot of your current EFTS income and liabilities. Unlike other date-related QuickDOC Reports, the EFTS Activity Report doesn't give a list of activity within a certain Begin Date and End Date. In fact, the EFTS Activity Report cares **ONLY** about the **Begin Date** (which it uses to total up all activity before that date into a **Forward Line**) so that individual items are printed only **on and after** that date.

The **Fwd Line** totals will include a total of all activity between the **EFTS Activity Report Start Date** (which is set under Setup, **Set Local Preferences**, General Tab, see illustration, below) and the Begin Date set on the Borrow Reports form.

You can see the **EFTS Activity Report Start Date** in the report reproduced above at the end of the first line after the title and subtitle: "**Started Tracking on 01-Jul-04**." If the EFTS Activity Report Start Date and the Begin Date for the report are the same, then all the Fwd lines are $0.00 except for the first line, from tblBorrowDeposits, which will show the amount entered on the Local Preferences Form as the **Beginning Balance** (shown as $141.91, above).

Use this report to track down EFTS loans, borrows, payments and credits, and to set up a situation where QuickDOC can alert you, at any time, as to your **EFTS Income** potential (from **tblLendItems** and **tblInvoices** in **QuickDOC.MDB**), against your current **EFTS Payments as Borrower** (from **tblBorrowDeposits**, for **EFTS Deposit Account Payments** already made, and from **tblBorrowItems** for upcoming payments for Borrowed items Received but not yet paid through EFTS).

Before running your first EFTS Activity Report, you should see *How to set up your initial EFTS Activity Report*, on page 56, above.

The EFTS Activity Report includes totals from **four separate tables** in the QuickDOC.MDB database:

1. EFTS Acct: Added, Used, SrvChg & Redist., from tblBorrowDeposits

The first table totaled is the **Borrow Deposits Table**, which holds a list of all deposit account payments (to single Lender Libraries as well as to EFTS under the EFTSUP Library Name) along with the items that were paid from each deposit account, listed by Request Number.   This list can be quite long, as you might imagine, which is one reason for setting the Begin Date of the Report to a relatively recent date, so that all earlier lines are summed up in a **FWD line**.

This part of the report lists **EFTS Debits** (which appear in the **Used column**):

1. **EFTS Borrowing Activity Marked as PaidEFTS**;
2. **EFTS Service Charges**
3. **EFTS Redistributions**.

EFTS Borrowing Activity Charges are added by marking the items reported in the **Detailed Debit Summary** of the EFTS Monthly Statement as PaidEFTS using either the **Date Filled date** on the report or the **last day of the month** for batch processing. This is accomplished by selecting the appropriate items in the Borrow Item Backfile (by Ctrl-Clicking their Record Selectors), choosing a Default Date, and then clicking the Mark Paid button.

EFTS Service Charges or EFTS Redistributions are entered as negative numbers as a separate Payment entry under Billing,EFTS on the QuickDOC Menu Bar, choice Payments (i.e., Payments from Borrowers). **Use the last day of the month for entering Service Charges and Redistributions**.

(Items you have borrowed but which have not yet been marked PaidEFTS appear in the last section of the report.)

It also includes the following **EFTS Credits** (which show in the **Added column**):

1. **EFTS Deposit Account Payments**,
2. **EFTS Upload Files Marked as Paid**.

Deposit Account Payments are usually entered using the **first date of the month** in which they appear in the EFTS Monthly Statement.

Most libraries will upload the previous month's Lending activity during the first week of the current month. While it might seem logical to mark the upload as paid just after it has been accepted, there is merit in waiting until you get your next Monthly EFTS Statement to do this. Be sure to use a **Paid Date in the same month as the Upload File** (using the **same date as the date of the Upload/Invoice** is a good practice), so that it will be easier to match your end-of-month total with the end-of-month total displayed on EFTS. One advantage to using the **end-of-month method** is that you'll also have that month's EFTS Service Charge and any EFTS Redistributions available in that Statement, so that you can enter all items at the same time.

GENERAL RULE: Credits toward the first of the month. Debits toward the end!

Section 1 ends with a **Borrow Deposits Totals** line, and a **Running Totals** line beneath (which will be a matching total here, since this is the first section of the report).

```
              15763903  Dep000001              $9.00
21-Jan-05  15843225  Dep000001              $9.00      -$1151.09

Borrow Deposits Totals:  129      $141.91   $1293.00   -$1151.09
Running Totals:  129 Items        $141.91   $1293.00   -$1151.09
```

[Unlike most Deposit Accounts in QuickDOC, the **EFTS Deposit Account** tracked in **tblBorrowDeposits** will permit a transaction to be charged to the Deposit Account of the default EFTS Library named **EFTSUP**, even if there is a negative balance showing on the account. These transactions are always charged to the default EFTS account payment **Dep000001** in tblBorrowDeposits. This deposit transaction number should always be kept available for that purpose. These Dep000001 items will be gradually reassigned to proper EFTS Deposit Payments as new payments are entered.]

2. EFTS Files Uploaded but not yet marked paid, from tblInvoices

The second table totaled is the **Invoices Table**, which holds all the Invoices you've sent to Borrowers, including entries for EFTS Upload Files.   An entry is made in **tblInvoices** whenever you create an EFTS Upload File, with the name of the file as the Invoice Number.

When a payment is made on an EFTS Invoice, it is posted to the line in the Invoices Table that contains the Invoice Number equal to the EFTS Upload filename. If the payment equals the Invoice Total then all is well. If not, then the Invoice (or Upload File in this case) remains open. **IN ALL CASES HERE, PAYMENTS ON EFTS INVOICES SHOULD ALWAYS EQUAL THE EFTS TOTAL**!

Uploaded Totals and Running Totals are shown at the bottom of this section 2.

```
--- EFTS Files Uploaded but not yet marked paid, from tblInvoices ---
01-Jul-04   Uploaded Fwd...       $0.00      $0.00      $0.00
01-Jul-04   EFTS-BET0406.txt     $20.00                $20.00
05-Aug-04  EFTS-BET0407.txt     $12.00                $32.00

Uploaded Totals:  2              $32.00                $32.00
Running Totals:  131 Items      $173.91   $1293.00   -$1119.09
```

In the case shown above, there are two uploads that still need to be marked as Paid. The **Member Monthly Statement** from EFTS should be available for at least the first of these, so that it can be marked as Paid when you get the chance.

3. EFTS Lends Filled but not yet uploaded, from tblLendItems

The third table totaled is the **LendItems Table**, which holds current Lending activity. Listed here are Request Numbers of items that have been Filled by you but not yet gathered into an EFTS Upload file. This list should only contain items from the current month, in most cases, and will only reflect activity with EFTS Libraries. **EFTS Lends Filled but not yet uploaded** are representative of future revenue and are therefore counted here, with the caveat that once the upload has been performed there may be items rejected (for insufficient funds, etc.).

Not Uploaded Totals and Running Totals are shown at the bottom of this section 3.

```
--- EFTS Lends Filled but not yet Uploaded, from tblLendItems ---
01-Jul-04   Not Uploaded Fwd...      $0.00      $0.00        $0.00
05-Aug-04 14680717  MAUVBD          $3.00                    $3.00
05-Aug-04 14686490  MAUVBD          $3.00                    $6.00
20-Aug-04 14819391  MAUVBD          $3.00                    $9.00
          14807679  MAUVBD          $3.00
20-Aug-04 14807632  MAUVBD          $3.00                   $15.00
09-Sep-04 14985241  MEUMAN         $11.00                   $26.00
20-Oct-04 15352157  MAUMGH         $11.00                   $37.00
04-Nov-04 15488252  PAUHHP         $11.00                   $48.00
27-Dec-04 15896903  PAUHHP         $11.00                   $59.00
28-Dec-04 15902254  MEUMAN         $11.00                   $70.00
28-Feb-05 16454510  PAUHHP         $11.00                   $81.00

Not Uploaded Totals:  11            $81.00                   $81.00
Running Totals:  142 Items         $254.91   $1293.00    -$1038.09
```

In the case above, it would appear that no EFTS Uploads have been performed since July, 2004. While this is an artificial demonstration, a report like the above would serve as a reminder to do an EFTS Upload at the earliest opportunity. It's generally considered bad form to upload items from more than a year ago, at the outside limit, since the Borrowing Library's Deposit Account balance may be blind-sided as a result. There isn't, however, a rule against it, as far as I know.

4. EFTS Borrows Received but not yet PaidEFTS, from tblBorrowItems

The final table totaled is the **BorrowItems Table**, which holds completed Borrowing activity. Listed here are Request Numbers of items that have been marked Received by you but not yet been marked as **PaidEFTS** (or paid in any other way). Criteria for inclusion here are:

1.   The request has a **Status of Received**.

2.   There is a **Charge greater than $0.00**

3.   The **Lending Library** is a library that has the **EFTS box checked** in its QuickDOC.MDB Library record (and is thus likely to be charged through EFTS).

4.   The **Received Date** is later than the EFTS Activity Report Start Date you indicated in Local Preferences.

EFTS Borrows Received but not yet PaidEFTS will eventually move into the Borrow Deposits Table, once they are marked PaidEFTS by you after they are finally reported as charged to you in the EFTS Monthly Report. Meanwhile, they loom as potential debits and are totaled accordingly.

Unpaid Borrows Totals and Running Totals are shown at the bottom of this section 5. Running Totals shown at the end of this section are the **Final Running Totals** and indicate your current EFTS exposure.

5

24-Feb-05 16381674	MOUWSL		$11.00	-$486.00
25-Feb-05 16442361	MDUNLM		$9.00	-$495.00
25-Feb-05 16443285	PAUPIT		$10.00	-$505.00
01-Mar-05 16462948	MDUNLM		$9.00	-$514.00
01-Mar-05 16462831	MDUNLM		$9.00	-$523.00
Unpaid Borrows Totals: 52			**$523.00**	**-$523.00**
Running Totals: 194 Items		**$254.91**	**$1816.00**	**-$1561.09**

The snapshot above, which indicates that we are deeply in the hole to EFTS, was done before we did the work to set up our files for an accurate EFTS Activity Report, using the methods described in *Managing EFTS Activity Reports* in the EFTS section on on page 157, above.

Before running your first report, see *How to set up your initial EFTS Activity Report*, on page 56, above.

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Lend Reports

The **Lend Reports form** gives choices for Report Name, Printer to print to (including Print Preview), Number of Copies to print, and Dates to include. Print Preview is always a good first choice, to get an idea of how many records will be sent to the printer.

Detailed Lend Report

There are a number of basic Lend side reports included in QuickDOC. The first is the **Detailed Lend Report**, which prints item-level information for each request filled during the period specified. The first line of each Library's activity includes a **list of the Library Groups** to which that Library belongs. The format is as follows:

27-Dec-2000			Beth Israel Deaconess Medical Center (01-Jul-00 to 31-Oct-00)			Page 1
Item	Borrower	ReqNo	Date	Title	Citation	Charge
	CTUUCC is a member of Library Group: R8$					
1	CTUUCC	622683	15-Sep-00	1998 Am J of physiology.	274():F541-F549	$0.00
Total 1 Items For Union Carbide Corporation					Total Charges For CTUUCC:	$0.00
	MAUAJH is a member of Library Groups: MA, MASSFAX					
1	MAUAJH	26620	21-Jul-00	1997 J int medical research.	May-Jun;25(3):155-8	$0.00
Total 1 Items For Anna Jaques Hospital					Total Charges For MAUAJH:	$0.00
	MAUBKM is a member of no Library Groups					
1	MAUBKM	359447	23-Aug-00	2000 J applied physiology (Bethesda, Md.	Aug;89(2):711-720	$0.00
Total 1 Items For BERKSHIRE MEDICAL CENTER					Total Charges For MAUBKM:	$0.00
	MAUBSM is a member of Library Group: MA					
1	MAUBSM	10944	18-Jul-00	2000 Research in nursing & health.	Jun;23(3):204-12	$3.00
2	MAUBSM	365461	23-Aug-00	1999 Pediatrics (Online)	Jan;103(1 Suppl E):374-83	$3.00
Total 2 Items For Holy Family Hospital and Medical Center					Total Charges For MAUBSM:	$6.00

(Inset note at top left of report): Library's Group memberships appear on the first line of each listing.

(Report title): Detailed Lend Report (by Library) 01-Jul-00 to 31-Oct-00

with appropriate Totals columns at the end.

Detailed Lend Report for One Borrower

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, labeled **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 Loaned 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.

Summary Lend Report

The **Summary Lend Report** lists total activity with each Borrower during the period in question: total items and the total amount charged.

Summary Lend Report (by Library)
01-Sep-02 to 31-Dec-02

7-Jan-2003		Beth Israel Deaconess Medical Center (01-Sep-02 to 31-Dec-02)			Page 1
Library No.	**Borrower LIBID**		**Items Loaned**	**Charge**	**Lib #**
1	MAUBKM	BERKSHIRE MEDICAL CENTER (CELLS, MA)	1	$0.00	1
2	MAUBVB	Va Med Ctr Brockton/Med Library Il (BBLC, MA)	1	$0.00	2
3	MAUDAV	ABIOMED Incorported (CELLS, MA)	1	$0.00	3
4	MAUERI	Eye Research Institute (CELLS, MA)	1	$0.00	4
5	MAUHCM	Children's Hospital (BBLC, MA)	1	$0.00	5
6	MAUHSL	St Lukes Hospital (CELLS, MA)	2	$0.00	6
7	MAUHYA	CAPE COD HOSPITAL (CELLS, MA, MASSFAX)	1	$0.00	7
8	MAULCB	LAHEY CLINIC (BBLC, MA)	1	$0.00	8
9	MAUMAH	Mount Auburn Hospital (BBLC, MA)	1	$0.00	9
10	MAUMHC	MetroWest Medical Center (BBLFAX, MA)	6	$0.00	10
11	MAUMLW	Mary Lane Hospital (CELLS, MA)	1	$3.00	11
12	MAUMRD	SPAULDING REHABILITATION HOSPITAL (MA$)	2	$6.00	12
13	MAUNBP	New England Baptist Hospital (BBLC, MA)	1	$0.00	13
14	MAUNEO	NEW ENGLAND COLLEGE OF OPTOMETRY (BBLC, MA)	4	$0.00	14
15	MAUSEF	St. Elizabeth's Medical Center (BBLFAX, MA)	2	$0.00	15
16	MAUTUV	Tufts Univ Veterinary School/Libra (CELLS, MA)	2	$0.00	16
17	MAUVBD	EDITH N ROGERS MEMORIAL VA HOSPITAL (MA$)	2	$6.00	17
18	MAUZSL	Dana-Farber Cancer Institute (BBLFAX, MA)	6	$0.00	18
19	MEUMAN	MAINE MEDICAL CENTER (R8$)	1	$11.00	19
20	NHUPNH	PORTSMOUTH REGIONAL HOSPITAL (CELLS, R8)	1	$0.00	20

Library Groups appear in parentheses, if there are groups assigned to that library.

TOTAL LIBRARIES: 20   **TOTAL ITEMS: 38**   **TOTAL CHARGES: $26.00**

Journals Loaned (Summary) Report

The **Journals Loaned (Summary) Report** lists each Journal Title loaned during the period in question, along with the number of times it was loaned and the ISSN.

Journals Loaned (Summary)
01-Jan-01 to 31-Dec-01

17-Apr-2002		Beth Israel Deaconess Medical Center (01-Jan-01 to 31-Dec-01)		Page 1
Journal#	**# Loaned**	**Jrnl Title**	**ISSN**	
1	1	AARP bulletin	1044-1123	
2	1	Academic medicine	1040-2446	
3	1	ACT ADAPT AGING		
4	2	Activities, adaptation aging	0192-4788	
5	2	Adv Data	0147-3956	
6	1	Advances in long-term care	1053-0606	
7	7	Age ageing	0002-0729	
8	2	Ageing society	0144-686X	
9	2	Aging	0002-0966	
10	56	Aging (Milano)	0394-9532	
11	2	Aging today	1067-8379	
12	1	AHRQ research activities / Agency for Healthcare R		
13	4	AIDS (London, England)	0269-9370	
14	2	AIDS clinical care	1043-1543	
15	32	Alzheimer disease associated disorders	0893-0341	
16	3	Am J Alzheimer's care related disorders research	0895-5336	
17	2	Am J Alzheimer's disease	1082-5207	

The left hand column is counting the titles as they are printed. At the end of the report is a general total:

208	1	Thorax		0040-6376
209	2	Transfusion		0041-1132
210	1	Vital health statistics. series 1: programs colle		0083-2014
211	3	Vital health statistics. series 13: data from nat		0083-2006
212	1	World J surgery		0364-2313
213	1	Zeitschrift für gerontologie und geriatrie		0948-6704

TOTAL JRNLS: 213   **TOTAL ITEMS: 849**

Journals Loaned (Full) Report

The **Journals Loaned (Full) Report** lists each Journal Title loaned during the period in question, but also includes a line for each item, including the Borrowing Library, the Year of publication, and the ISSN.

Journals Loaned (Full)
01-Jan-01 to 31-Dec-01

17-Apr-2002   Beth Israel Deaconess Medical Center (01-Jan-01 to 31-Dec-01)   Page 1

Journal#	# Loaned	Borrower	Year	Jrnl Title	ISSN
1	1	NYUMFB	1994	AARP bulletin	1044-1123
2	1	MAUZSL	2001	Academic medicine	1040-2446
3	1	NYUVAV	2000	ACT ADAPT AGING	
4	1	NHULRL	1999	Activities, adaptation aging	0192-4788
	2	NJUKMH	1997		
5	1	PAUBYH	2000	Adv Data	0147-3956
	2	NJUDAI	1992		
6	1	PAUMEC	1991	Advances in long-term care	1053-0606
7	1	MAUHLO	1997	Age ageing	0002-0729
	2	NJUMSG	1986		
	3	NYUZGJ	1986		
	4	PAUAEP	1983		
	5	PAUMHP	1980		
	6	PAUPMM	1977		
	7	NYUNCN	1973		

This report can be fairly lengthy, with a line for each item loaned. The individual numbers in the second column (**# Loaned**) provide the subtotal for each Journal during the printout. This report also includes a total at the end of the report:

```
17-Apr-2002              Beth Israel Deaconess Medical Center (01-Jan-01 to 31-Dec-01)              Page 17
Journal#      # Loaned      Borrower   Year   Jrnl Title                                    ISSN
  206            1          AZUARI     1999   Structural equation modeling                  1070-5511
               2          ILUEVE     1999
               3          ONCTAW     1996
               4          MOUVHC     1996
               5          WAUWAS     1995
               6          TXUTSA     1995
               7          WAUWAS     1994

  207            1          MAUNBP     2000   Surgery                                        0039-6060

  208            1          MAUCOM     1995   Thorax                                         0040-6376

  209            1          MEUFBR     2001   Transfusion                                    0041-1132
               2          MEUFBR     2001

  210            1          PAUEMB     1967   Vital health statistics. series 1: programs colle   0083-2014

  211            1          PAUAEP     2001   Vital health statistics. series 13: data from nat   0083-2006
               2          NYUCIH     2001
               3          PAUMGE     1998

  212            1          MAUMAH     1994   World J surgery                                0364-2313

  213            1          NJUKMH     1999   Zeitschrift fur gerontologie und geriatrie     0948-6704

TOTAL ALL ITEMS: 849                         TOTAL JRNLS:    213
```

Compute Totals (Lending) Report

The **Compute Totals (Lending) Report** provides a quick snapshot of Lending activity in various categories, such as **Item Source**, **Delivery Method**, **Type of Item**, etc. . It gives the percentage of items on each Source that were delivered electronically, and also calculates percentages of activity during the period sepcified, and computes an **Average Charge per Item** for that period. The report also gives a subtotal within each Source if any of those items were **monographs, journals, e-journals** or **audio-visuals**. A typical first page would look like this:

The first page of Compute Totals (Lending) also shows a report of the methods of **Billing information** for the period, and **amounts billed to Libraries** (or to be billed), with categories for **EFTS**, **IFM**. **Invoice, Deposit Acct, Other, Not Yet Billed** and **Free**.

BILLING. Items Billed Via:	EFTS	IFM	Invoice	Deposit Acct	Other	Not Yet Billed	Free
	17	2	1		1	1	120
Est. $ By Method:	$51.00	$14.00	$11.00		$3.00	$3.00	$0.00
% of Filled Items:	11.97%	1.41%	0.70%		0.70%	0.70%	84.51%
TOTAL Charged: $82.00					Avg Chrg/Item: $0.58		

This can be a quick way to check the amounts you receive (or should receive) from various Billing methods.

In addition, the Lend report also lists **Rejection Reasons** for those items that were not filled, along with the percentage of all rejections the listed Reason represented.

Report on Reasons for Rejection of the 42 Items Received But Not Filled:

REJECTION REASONS:	Code	Description	# of Items	% of Total Rej.
	BDY	At Bindery	2	4.76%
	CAN	Cancelled	2	4.76%
	COP	Needs Copyright Info	1	2.38%
	CST	Cost exceeds limit	2	4.76%
	INC	Not found as cited	1	2.38%
	LAC	Lacking (Issue/Vol)	9	21.43%
	NYR	Not yet received	1	2.38%
	OTH	Other	24	57.14%

These can be useful for **Collection Development** reports and planning.

Library Group Report – By Del Method (Lending)

The **Library Group Report – By Delivery Method (Lending)** is found on the second page of the Compute Totals (Lending) Report, at the top. It provides a breakdown of activity on the Lend side by Library Group of the Borrowing Library. Since a single Library may belong to more than one Group, the Totals here may not match the total number of loaned items for the period. The report breaks activity down by **Delivery Method** and gives the percentage of items filled for each Library Group that were delivered electronically, as well as the percentage of activity with each Library Group within all Groups.

```
6-Jan-2003              Beth Israel Deaconess Medical Center  (01-Jan-02 to 31-Dec-02)              Page 2

                           Library Group Report – By Del Method (Lending)
```

Library Group	TOTAL ITEMS	Group % Total	Physical Delivery: (Mono/					Electronic Delivery:			%	Item Sent To:	
			Mail	PickUp	Other	A/V)	Web	Ariel	Email	Fax	Elect	Library	Patron
OUT$													
OUT													
CELLS	44	17.32%	30			(1)				14	32%	44	
MA	106	41.73%	28							78	74%	106	
R8$	1	0.39%	1									1	
R1$													
R8	9	3.54%	8			(1)				1	11%	9	
MA$	18	7.09%	13							5	28%	18	
BBLC	33	12.99%	3							30	91%	33	
BBLFAX	36	14.17%	3							33	92%	36	
NLM													
R1													
MASSFAX	7	2.76%	1							6	86%	7	
Total in Groups:	**254**		**87**							**167**		**254**	
% of Totals:			**34.25%**							**65.75%**			

> These are the numbers of Total Items that were monograph or A-V

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]

[There were also 9 items loaned to Libraries with no assigned Library Group.]

If there are loans to Libraries that have not been assigned to a Library Group, the number of those items is listed at the end of the report.

Library Group Report - By Source (Lending)

The **Library Group Report – By Source (Lending)** is found at the bottom of the **second page (or later) of the Compute Totals (Lending) Report**. It provides a breakdown of activity on the Lend side **by Source and Library Group** of the Borrowing Library. Since a single Library may belong to more than one Group, the Totals here may not match the total number of loaned items for the period. The report breaks Group activity out by Source used, including: DOCLINE, OCLC, RLIN, Phone, Fax, Mail and Other. **Item payment methods** (broken out by EFTS, IFM and non-Electronic methods---typically, Invoices, Coupons, Deposit Accounts, Credits, etc.) are also listed by Group.

```
                           Library Group Report - By Source (Lending)
```

Library Group	TOTAL ITEMS	Source: DOCLINE	OCLC	RLIN	Phone	Fax	Mail	Other	Item Payment Via: EFTS	IFM	Other
OUT$											
OUT											
CELLS	44	43						1	1		
MA	106	106							3	2	
R8$	1	1									1
R1$											
R8	9	8						1			
MA$	18	18							14	2	1
BBLC	33	33									
BBLFAX	36	36									2
NLM											
R1											
MASSFAX	7	7									
Total in Groups:	**254**	**252**						**2**	**18**	**7**	**1**
% of Groups Totals:		**99.21%**						**0.79%**	**7.09%**	**2.76%**	**0.39%**

> 'Other' payments include Invoices, Dep Accts, etc.

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]

Library Invoices

You can also print **Invoices from the Reports Menu**, although most will use the Billing, EFTS Menu for this.

List of Invoices Outstanding Report

This is also available on the Reports, Loaned Items Menu, as well as the Billing, EFTS Menu. This report includes all invoices generated during the period specified that have not been paid, or have received only partial payment. The list has the following format:

```
┌─────────────────────────────────────────────────────────────────────────────────────────┐
│ Report of Invoices issued within                                                          │
│ the selected dates for which no        List of Invoices Outstanding                       │
│ payment, or only partial payment           (01-Dec-02 to 31-Dec-02)                       │
│ has been received.                                                                        │
│                                                                                           │
│ 27-Jan-2003        Beth Israel Deaconess Medical Center (01-Dec-02 to 31-Dec-02)   Page 1 │
│ Inv #          Invoice Date    Invoice No.       Inv Total      Paid      Paid Date  Balance │
│    1            10-Dec-02      EFTS-BET0211.txt    $3.00       ($1.00)    22-Jan-03   $2.00 │
│ Totals for 10-Dec-02: 1                            $3.00        $1.00             Balance: $2.00 │
│                                                                                           │
│ TOTAL INVOICES: 1             TOTAL INVOICED: $3.00     PAID: $1.00               Balance: $2.00 │
└─────────────────────────────────────────────────────────────────────────────────────────┘
```

This list can be used to reprint a second notice for selected invoices. A more automated process for generating second notices is still planned for some time in the future.

Reports after Imports

QuickDOC produces various reports after importing data, primarily after QDPortal Imports or Old QD Data (DOS Ver) Imports.

Reports at the end of the QDPortal Import Session

QuickDOC has always produced various reports after importing data saved in QDPortal, to log new Patrons created, new Libraries, problems with updates, etc. In all cases the Messages will use **Open as the default action for all the Import reports**. Using Open provides a consistency for all situations where the program wants to give an alert that some action has been taken (or not taken) that the user should know about. It also provides a chance to edit, print or even discard all the notification data if the user decides it's not needed as a printout. This last function provides an easy way to clear out a log file without having to use Windows Explorer or some other method to locate and delete it.

All Message Boxes announcing these alerts have the following format (Note: in current versions, the NewLibNt.txt file is located in the QDLoan folder just beneath the database location):
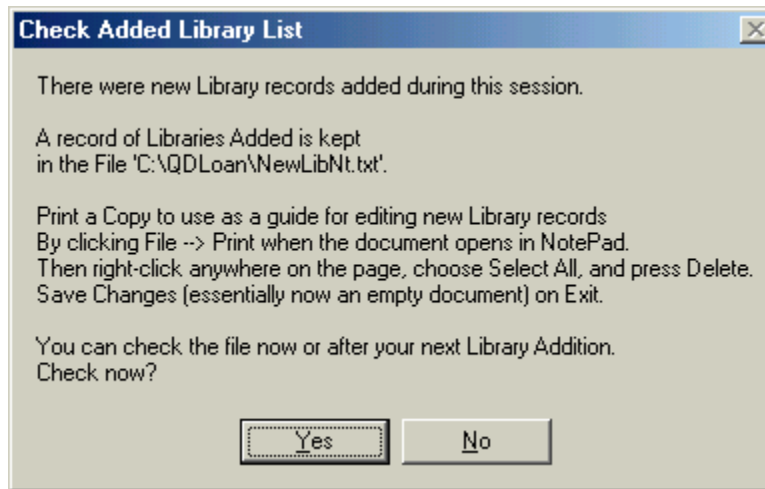
In this case, the note is that a new library (or libraries) has been added. Generally you will want to print a notice to have on hand as a reminder to edit the new Library record, so that you can assign Library Groups, contact information, etc. In particular, for Libraries created during a Borrow transaction, QuickDOC won't be able to automatically fill in Address information. In general, for these cases you will see only the word **City** to indicate that it needs to be looked up (state will be there, since it can be inferred from the LIBID).

Managing the QDPortal Import Log Files

After editing, and printing, you can **clear out the NewLibNt file** (or any of the log files) for the next new library notice by using the following method:

    1.   Right-click any white space in the document window and choose Select All.

    2.   This will cause the entire document to be selected.

```
NewLibNt.txt - Notepad                                    _ □ ×
File   Edit   Search   Help

[Use this report to check/edit the New Lib Record]

Created new Library record for LIBID: ABCPTR in Lend Import.
Institution Name: Peter Lougheed Centre
City, State, etc: Calgary, AB T1Y 6J4

Sunday, September 28, 2003          Rpt of New Libraries Created in QDPortal
Import
[Use this report to check/edit the New Lib Record]

Created new Library record for LIBID: ABCPTR in Lend Import.
Institution Name: Peter Lougheed Centre
City, State, etc: Calgary, AB T1Y 6J4

Sunday, September 28, 2003          Rpt of New Libraries Created in QDPortal
Import
[Use this report to check/edit the New Lib Record]

Created new Library record for LIBID: ABCPTR in Lend Import.
Institution Name: Peter Lougheed Centre
City, State, etc: Calgary, AB T1Y 6J4
```

After 'Select All' chosen.

3.   Press the **Delete key** to delete the chosen text, then click File and Exit from the
        Notepad File Menu.

```
NewLibNt.txt - Notepad                                    _ □ ×
File   Edit   Search   Help
```

Blank document after 'Select All' and Delete key pressed. At this point either click
File, Save (to save the blank document), or File, Exit (answering Yes to the Save)
question. If some versions of Notepad won't permit saving a blank document, just press
Enter once and then Save.

```
Notepad                                    ×
  ⚠  The text in the C:\QDLoan\NewLibNt.txt file has changed.

      Do you want to save the changes?

         [ Yes ]      [ No ]      [ Cancel ]
```

4.   Click Yes to save the blank document. If your version of Notepad won't permit saving a blank document, just press Enter once on the first line to give the program something to save.

Access to Import Log Reports from the Utilities Menu

In addition to the access to reports given at the end of the import session, QuickDOC also includes choices under the Utilities Menu for **Borrow Log Files** and **Loan Log Files**. These provide an alternate method for **viewing, editing and printing Import Log Files**. The Utilities Menu appears as follows:

Borrow Import Log Files

The Borrow Log Files choice displays an **Open Dialog** with any existing Borrow Log files listed. Borrow Log Files are located in the **QDBorrow folder** under the folder where the QuickDOC.MDB database resides (e.g., **DB\QDBorrow\LDUpFail.txt**). (These files used to be saved to C:\QDBorrow in earlier versions of QuickDOC.) They may include the following:

LDUpFail.log

NoLDSave.txt

NoLDXUpd.txt

NoSave.txt

PatronNt.txt

Following is an example of how this method can be used with the PatronNt.txt file, which is a list of all new Patrons created in the Import process. First, clicking the Borrow Log Files choice on the Utilities menu shows the Open Dialog with any existing log files (Note: in current versions, the PatronNt.txt file is located in the QDBorrow folder just beneath the database location):
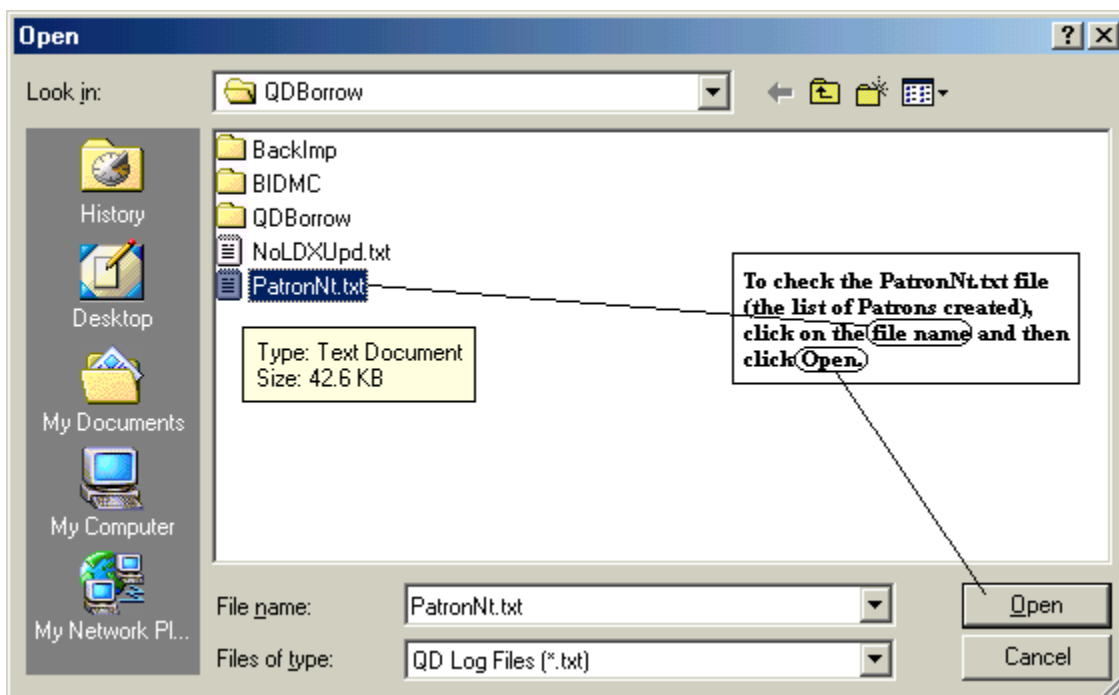
Select the PatronNt.txt file by clicking on it and then clicking the **Open** button. The file is then displayed in the document window (not Notepad, but similar in behavior) for editing, printing, etc.
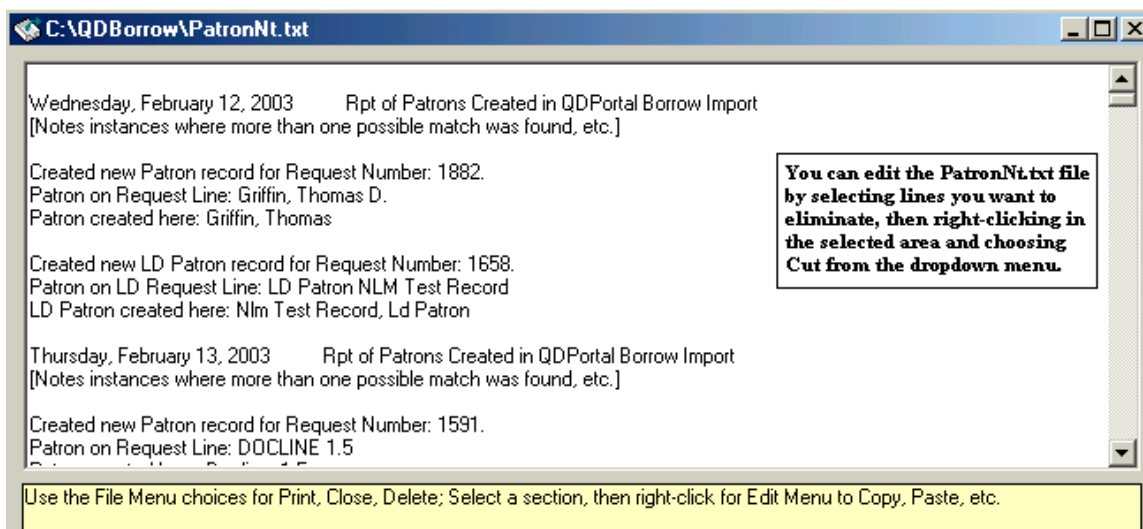
When you're finished editing, use the **File Menu choice in QuickDOC** to take action on the file, including **Close File**, **Delete File** or **Print File**. You'll also see the **Save File** choice enabled if indeed there have been any changes.
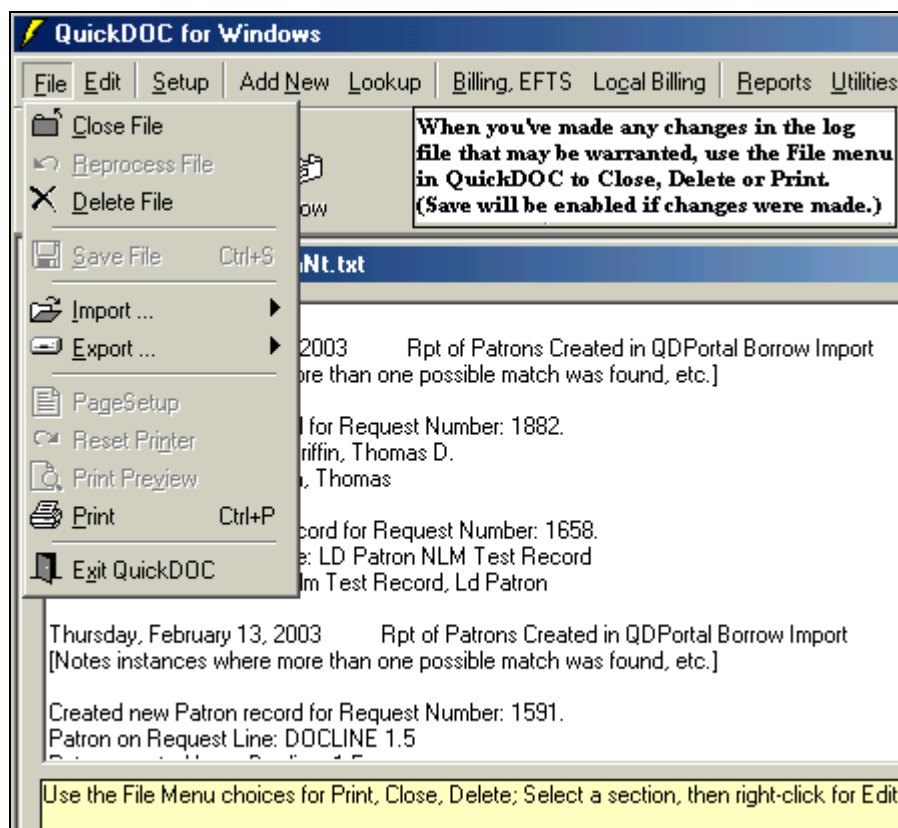
Patrons Created Log File

This is the most voluminous of the QDPortal Import Reports, at least during an initial import where data has been saved in QDPortal for some time before QuickDOC has been installed. It is a report of **ALL NEW PATRONS CREATED DURING THIS IMPORT SESSION**.

Whether the Patron appears problematic or not, an entry is made in the **PatronNt.txt** file (located in the QDBorrow folder under the database folder) of the Patron's creation. A note is also made if the Patron imported from the DOCLINE Request isn't identified by a Patron Number (the number in brackets that has identified the Patron Record in both the old DOS QD and the new QD4Win), which usually appears at the end of the Patron Name field in the format: [1234].

In most cases, these New Patrons will have been properly assigned as to Last Name, First Name, etc., but this report is to permit the editing of those whose newly made records are not accurate. After each QDPortal session where a Patron was created, you'll be asked whether you want to print this report now or save for later.

For normal QDPortal Imports, where there will be only a few new Patrons, just choose Print from the File Menu in Notepad (or from the QuickDOC File Menu if you've opened the file under Borrow Log Files on the Utilities Menu). For any larger import, where you think you might need to spend some time checking that Patrons were properly assigned, don't print the file. Save it until later, when you can edit it and use it to guide you in fixing anything that needs to be fixed in the Patrons Table.

The file **PatronNt.txt** looks like this in Notepad (see above for the QuickDOC display):

```
PatronNt.txt - Notepad
File   Edit   Search   Help

Monday, March 18, 2002           Rpt of Patrons Created in QDPortal Borrow Import
[Notes instances where more than one possible match was found, etc.]

Created new Patron record for Request Number: 1033223.
Patron on Request Line: Plummer, Al
Patron created here: Plummer, Al

A total of 2 Patron records were close matches for Request No. 1543583 Patron.
Patron on the Request Line: Yelick, P
Patron used here: Yelick, P

Created new Patron record for Request Number: 1928466.
Patron on Request Line: Smith, D
Patron created here: Smith, D

Created new Patron record for Request Number: 1969861.
Patron on Request Line: Prince, Nicole
Patron created here: Prince, Nicole

Created new Patron record for Request Number: 2053000.
Patron on Request Line: Canyurek
```

In most cases the Patron will be correct and you can delete these lines before printing this file.

If there's any chance that the wrong patron might have been chosen, you'll get a note that there was more than one possibility.

Once you've scanned this file and deleted those that seem to have created the correct patron, you can print those that are left (a considerably shorter file) to have on hand as you edit the Patron file.

The best way to work with a long file is to inspect it, deleting those entries that are obviously correct, leaving only those that deserve further exploration. In the case above, the Plummer entry seems okay, so you can delete those three lines (plus the space before the next line). Same with all the other lines visible, above, except for the Yelick line.

This line tells you that there are more than one Yelicks in the database, and that the Import process has chosen this one (Yelick, P) as the most appropriate. In this case, the guess is obviously correct, but it's still a notice that you might want to check the OTHER Yelick, to see whether its items should be joined with those for this Patron.

Once the file is cleaned up, print a copy, then either use the Select All and Delete method in Notepad, or use the Delete choice on the File Menu in QuickDOC, to discard that list and be ready for the next new Patron created.

Other Borrow QDPortal Log Files.

LDUpFail.log This is an audit file to check for reasons why the update to a Loansome Doc Record didn't succeed.

NoLDSave.txt This is an audit file to check for reasons why a Loansome Doc Receipt couldn't be added to the tblBorrowItems Table in the QuickDOC.MDB Database.

NoLDXUpd.txt This report lists Loansome Doc Updates saved in QDPortal that didn't find a record in the database to update. Print this out periodically and delete it. The report can then be used, if necessary, to add the item to the database, assuming the bibliographic data is available, but anything not filled can be ignored. Oftentimes, the record is there now, but wasn't in the db at the time of the update, and can be manually updated from the report.

NoSave.txt   This is an audit file to check for reasons why a Borrow couldn't be added to the tblBorrowItems Table in the QuickDOC.MDB Database.

Loan Import Log Files

The Loan Log Files choice displays an **Open Dialog** with any existing Loan Log files listed. Loan Log Files are located in the **QDLoan folder** (e.g., **DB\QDLoan\NewLibNt.txt**) beneath the folder where the QuickDOC.MDB database is located (these files used to be saved to C:\QDLoan in earlier versions of QuickDOC) and may include the following:

<div align="center">

NewLibNt.txt

NoSave.txt

NoUpdt.txt

OrphUpdt.txt

UpdtFail.log

</div>

Libraries Created Log File (NewLibNt.txt)

QDPortal will report all instances where a Library was created during the Import Session. This is to alert you to the creation and give you a chance to edit that Library immediately, to be sure that it reflects the Charge Profile, Groups affiliation, and other values that it should reflect.

Whenever a Library record is created, in either Receipts or Borrows, an entry is made in the **NewLibNt.txt** file of the Library creation. When the import session is complete, if a new Library record has been created during that session, you'll see a Message Box with the following message (Note: in current versions, the NewLibNt.txt file is located in the QDLoan folder just beneath the database location):

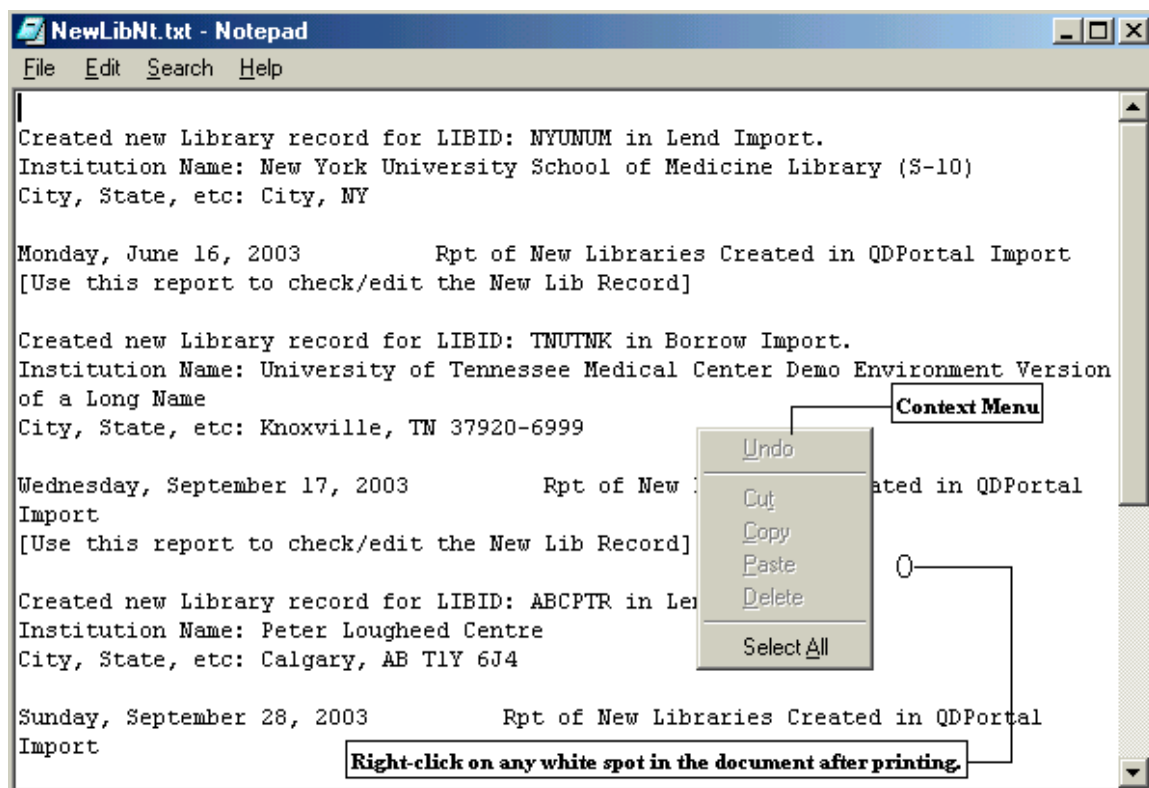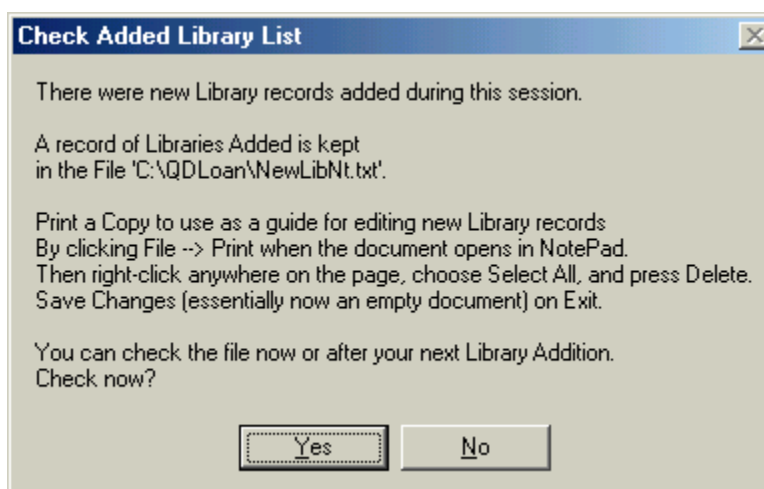If you click Yes, Notepad will open with the Libraries that have been added listed:
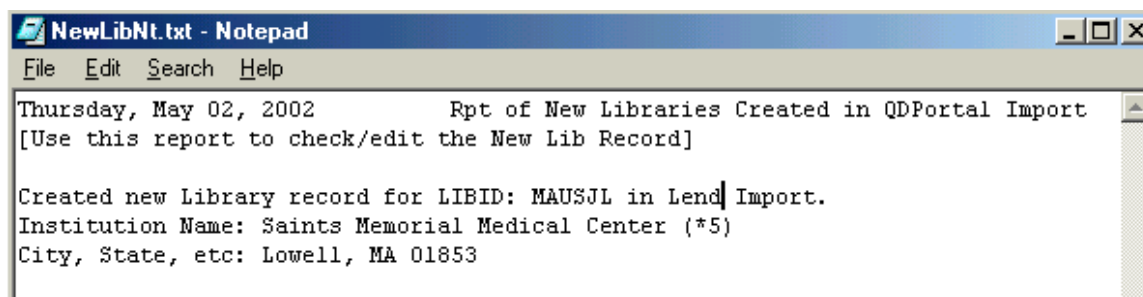
You can print a copy of this in Notepad, to use when editing the new Library records. Once you've printed the list, either delete the file DBLocation\QDLoan\NewLibNt.txt or delete all its

contents while in Notepad (using the **Select All** method described above); otherwise any new Libraries will be added onto the end of this list and the file will continue to grow.

Other short reports that may appear in the DBLocation\QDLoan folder include:

Other Lend QDPortal Log Files.

Methods of dealing with the last three of these four files are similar to the log files for the Borrow versions enumerated above:

NoSave.txt   This is an audit file to check for reasons why a Receipt (DOCLINE Lend) couldn't be added to the tblLendtems Table in the QuickDOC.MDB Database.

NoUpdt.txt   This is an audit file to check for reasons why the update to a DOCLINE Lend Record didn't succeed. It should reflect a reason for the inability to update the item to Filled, Not Filled, etc.

OrphUpdt.txt   This is the Orphan Update File, which contains copies of all DOCLINE Lend Updates that were unable to perform a successful update in the database. This file has its own entry on the Utilities Menu, so that it can be inspected, printed, and run through for reprocessing, if necessary. See the Help Index entry under OrphUpdt.txt for more information.

UpdtFail.log   This is an audit file to check for reasons why the Lend Update imported from DOCLINE was unable to update a Receipt record that should have been found in the tblLendItems Table in the QuickDOC.MDB Database (typically, because the original Receipt record isn't there).

Old QD Data (DOS Ver) Reports

Libraries

As it's working, the import process produces a **Report of Libraries Imported From Old QD**, so you can double-check its decisions and, if necessary, correct them. The report has this format:

```
Monday, December 18, 2000          Report of Libraries Imported From Old QD - MAUBET

Added Old QD Library WYETH-AYERST RESEARCH (S-101)    Old Code: ACY
     To New DOCUSER Record: NYUACY; Wyeth Ayerst Research (S-101)

Added Old QD Library ADDISON GILBERT HOSPITAL    Old Code: ADD
     To Closest DOCUSER Match: MAUAGG; Addison Gilbert Hospital

Added Old QD Library US AGENCY FOR INTERNAT'L DEVELOP.    Old Code: AID
     To a Made-Up DOCUSER Value.  New Value: DCUAID; Us Agency For Internat'l Develop.

Added Old QD Library AMERICAN MEDICAL ASSOCIATION    Old Code: AMA
     To Closest DOCUSER Match: ILUAMA; American Medical Association

Added Old QD Library AMESBURY HOSPITAL/ATTN: ADMINISTRA    Old Code: AME
     To a Made-Up DOCUSER Value.  New Value: XXXAME; Amesbury Hospital/Attn: Administra

Added Old QD Library COLLEGE OF PHYSICIANS AND SURGEONS    Old Code: BCP
      To New DOCUSER Record: BCCBCP; College Of Physicians And Surgeons Of British Colu

Added Old QD Library CORNELL UNIV MED COLLEGE/SAMUEL WO    Old Code: BYC
      To New DOCUSER Record: NYUCOR; Weill Medical College of Cornell University
```

In the report above:

1. The **first item** reports what is no doubt a **correct transfer**. The old code was ACY and the new is NYUACY. The old Institution name (in CAPS on the first line) matches the new name as retrieved from the DOCUSER file.

2. The **second item** shows a case where the code in old QD doesn't match that found in the new, but there's a **close enough match** to suggest the correct entry, so the new record MAUAGG is assigned.

3. The **third item** wasn't found in DOCUSER, so a **new LIBID is invented**, using the State/Province captured from old QD. No other DCUAID exists, so that value is assigned.

4. The **fourth item** found a **likely match** for AMA.

5. The **fifth** was for a Library in old QD with **no address information**. Since we can't tell which state or province this library is in, and we don't have an old LIBID (in the 12345A format---it's probably one of those 00000A Libraries), the only place to go is **XXX plus the old code**.

6. The **sixth** found the correct Canadian library (the old record no doubt had the correct old LIBID).

Finally, the **last item** might suggest a check. The old Cornell was filed under BYC, but it had a real LIBID (10021A), which was successfully looked up in the new DOCUSER file. This produced the hit on new LIBID NYUCOR. But the two names are sufficiently different that it might be wise to double-check before accepting this choice uncritically, just in case the old LIBID was entered incorrectly (although I think that this one was okay, but haven't had time to check!). This file will be located in your QuickDOC Program folder under the name of **LibrImp.txt**.

Loans

As it's working, the import process produces a **Report of Loans Imported From Old QD**, so you can double-check its decisions and, if necessary, correct them. The report has this format:

```
Wednesday, December 20, 2000            Report of Loans Imported From Old QD - MAUBET

More than one match was found while searching ISSN for NATURE.
   Chosen Title: Nature.   ISSN: 0028-0836

Could not find Library for old Request Number LOW-9711204187 in file.
   Filed instead with Orphan Borrower XXXNOT.
```

This report captures 2 situations:

1. If there was more than one match on a journal title, it lets you know, and

2. If it can't find an old Borrower in the new file it assigns it to a default value of **XXXNOT**.

You can reassign these later, after creating the Borrower record. This file will be located in your QuickDOC Program folder under the name of **LoanImp.txt**.

Borrows

As it's working, the import process produces a **Report of Borrows Imported From Old QD**, so you can double-check its decisions and, if necessary, correct them. The report has this format:

```
BorrImp.txt - Notepad                                          _ □ X

File  Edit  Search  Help

Sunday, October 21, 2001          Report of Borrows Imported From Old QD - MAUBET
[Notes Jrnl Imports where ISSN is ambiguous (95%+ will be 0k) & unmatched Libs]

BET-9812302997 - More than 1 match found for ACTA CARDIOLOGICA  ←    Old DOS QD Jrnl Title
DOS QD Citation: 1984 39(2):139-45
   Chosen Title: Acta cardiologica   ISSN: 0001-5385   ←
                                Title in new QuickDOC.MDB       Should match ISSN
BET-9812304127 - Couldn't find true ISSN match for ANNALES D ENDOCRINOLOGIE
                 Filed without an ISSN as Title: ANNALES D ENDOCRINOLOGIE

BET-9812304123 - More than 1 match found for ARCH INTERNAL MEDICINE
DOS QD Citation: 1985 145(9):1585-7  Sep
   Chosen Title: Arch internal medicine    ISSN: 0003-9926
```

Use this to check for Journal Matches in the new QuickDOC.MDB database. If the ISSN and Journal seem wrong, you have the request number to use to re-assign it properly. This file will be located in your QuickDOC Program folder under the name of **BorrImp.txt**.

Imports and Exports

Imported Data

QuickDOC can import DOCLINE activity as it occurs, or in batch format from saved files. As the data is saved to the database, copies of the captured DOCLINE pages are also saved as backup information.

Batch Import from C:\QDBorrow and C:\QDLoan folders

Even though versions after 2.2.0 import DOCLINE activity directly into the QuickDOC.MDB database, there will still be checks on the **C:\QDBorrow** and **C:\QDLoan** folders, both for backward compatibility and to permit the importing of previously saved or unsaved data. Any file with the traditional file import names (including the backup yyyyBDat.txt or yyyyLDat.txt filenames) will be run through the parsing process in the same way it was in the old QDPortal two-step process. If there are files to be imported in this fashion, the appropriate choice on the File, **Import Menu** will be enabled:
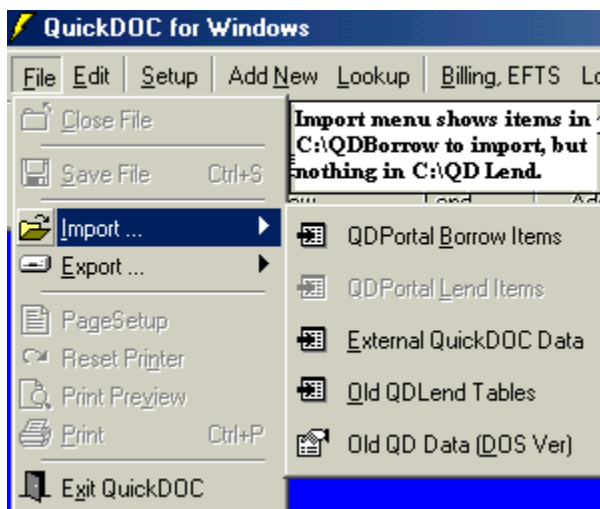
In the case above, there are files in the C:\QDBorrow folder that are ready to be added to the database.

Backups of import data are located centrally.

With QDPortal, where DOCLINE capture files were saved to the C:\QDBorrow and C:\QDLoan folders, once the files were parsed and imported into the database, backups of the raw data were saved in folders named **BackImp** under each of these primary folders. Beginning with version 2.2, 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:
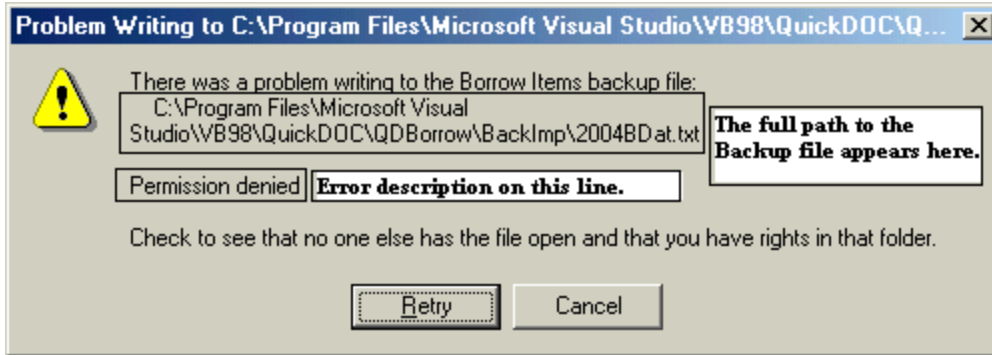
Permission denied indicates that the file is open in another process (or that it's marked **Read Only**, or that the users doesn't have the proper rights in this folder, but that shouldn't be the case here), so the write operation cannot proceed. In the case of these BackImp text files, unless the other 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:
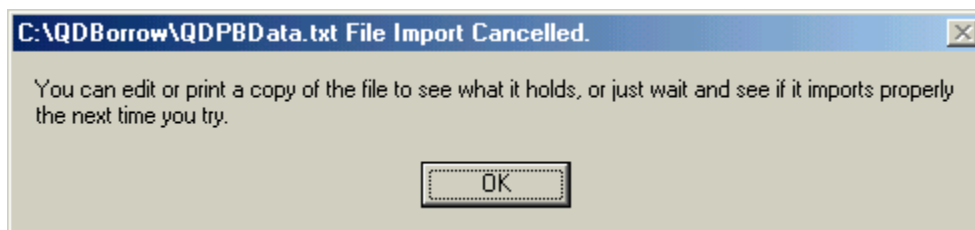
The original file is not deleted but is saved in the C:\QDBorrow or C:\QDLoan folder of the machine that received the message. Once the appropriate action is taken regarding the backup file, just click File, Import, and either QDPortal Borrow Items or QDPortal Lend Items, as appropriate. Alternatively, you can print out the file from the C:\QDBorrow or C:\QDLoan folder to see what it contains.

Because the time the programs 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.

In addition to the alternate QDPortal Import methods, there are three other import choices:

- ❑ **External QuickDOC Data**
- ❑ **Old QDLend Tables**
- ❑ **Old QD Data (DOS Version)**

External QuickDOC.MDB Files

This choice is for **importing data held in QuickDOC.MDB files other than your central database file**. Particularly in cases where QuickDOC was first loaded on one computer (and the QDPortal Import data was transferred to the database stipulated by that installation) and then the database location was changed (either manually or by choice on another computer on the same network), there may still be unrecorded QDPortal captured items at the original database location that were never transferred to the central location (this should no longer happen, so long as the new location is chosen within QuickDOC, but who can ever be sure?).

366.

Use this choice to check whether any QuickDOC.MDB files that are currently sitting on C: drives on any machines in your network have any items captured via QDPortal that are not currently residing in your central database.

Updates to QuickDOC also include an **Update Database under the name of QDUpd.MDB**, also located in the Program folder, which contains new data structures and data to be added to the central QuickDOC.MDB database when a new version is first run and the central database has not yet been upgraded (if you have more than one machine upgrading, then this activity will only occur during the first machine's update; other machines will find that the DB matches the version they're upgrading to, so no activity is necessary).

Upgrade All QuickDOC Machines at the Same Time. BTW, if you upgrade one machine on a network to the latest QuickDOC update, and that update includes a **database upgrade** (typically including new Fields, perhaps new Tables, and sometimes new data for Lookup Tables), upgrade any other machines on the same network (those running QuickDOC and QDPortal, of course) at that time as well. While most QuickDOC updates have not changed the database structure, and those that have changed the DB were done with an eye toward accommodating access from lesser QuickDOC versions, it's always safer to upgrade all machines using QuickDOC at the same time. Downloading the Install file (either Web-Install or Complete) to a local shared drive and then running the Install on that file from each machine using QuickDOC will prevent any missed communication.

If you suspect that you have a QuickDOC.MDB file sitting somewhere on your C: Drive that has data not currently saved in your central database, you can import it here.

This utility will examine any QuickDOC.MDB file and, if it has data that doesn't exist in the central database, import those unique records, from any of the QuickDOC Tables, into the DB. You can select a DB to import as many times as you like: only NEW records will be imported to the central database.

If you want to use this method to import data from another Access 2000 type database, it must have the structure that is expected in a QuickDOC.MDB database. If you have a database named OtherDB.MDB---and it's in a proper QuickDOC.MDB structure---you must first copy this file (OtherDB.MDB) to filename QuickDOC.MDB in a folder different from that of the REAL QuickDOC.MDB, and then choose to **import External QuickDOC Data** from that file (QuickDOC.MDB, in the new location).

At this time, there's no provision for importing data from other data repositories (though this may change as time goes on).

Importing External QuickDOC Data uses the same form as is used to find and locate the current database. In this case, though, choose the QuickDOC.MDB file to import, rather than choosing the folder in which to locate the database. Steps are as follows:

1. Start up QuickDOC, and click 'File' and 'Import' from the Menu bar.

2. Choose 'External QuickDOC Data' to get to the Database Operations form.

3. Use the Directory list box to navigate to the Backup folder underneath QuickDOC. You should see "FOUND ONE HERE" with the file stats and the 'Import Data' button will be enabled.

4. Click the **Import Data button** and any records in this db that are not in the current db will be added. In addition, the old **db will be marked as "MOVED"** so that, if you check again in the future you'll get a message that the data was moved.
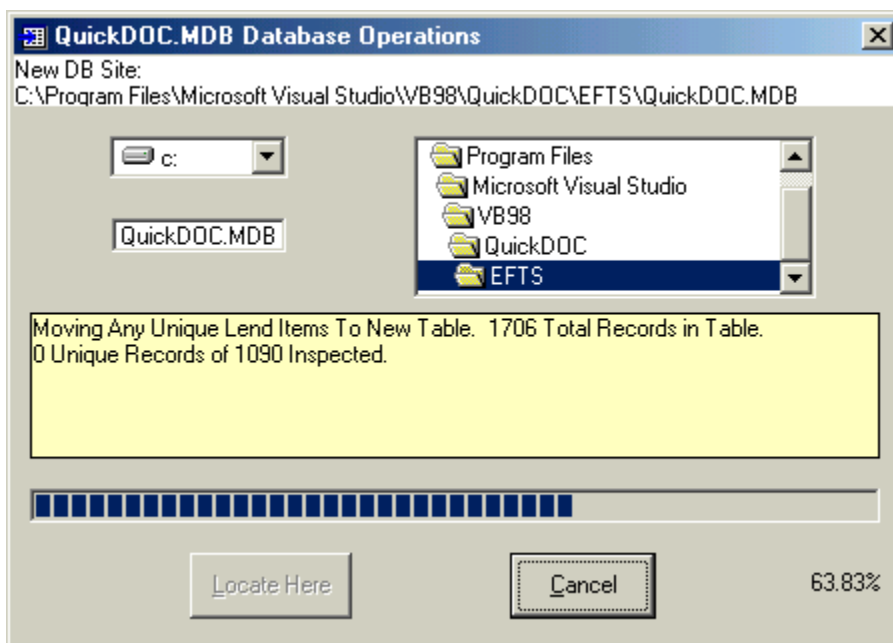
Since all records are checked first before being imported into QuickDOC.MDB, trying to import from a file that has already been imported does no harm. Nevertheless, it makes no sense to try importing files over and over again, so that files---once imported---are then marked "**MOVED**" and any subsequent attempts to import them pop up a Message Box with that information.

One final note regarding moving the QuickDOC.MDB:

> **ALWAYS USE THE MENU BAR 'Setup' and 'Locate QuickDOC.MDB' PROCEDURE TO MOVE THE DB!   NEVER JUST COPY OR MOVE THE FILE ON ITS OWN, OUTSIDE OF THE PROGRAM**.

While you will probably be able to recover if you do this (by finding it again under Setup, etc.), it's always safer to make the move within the program.

Old QDLend Tables

This choice is for **importing data held in QDLend.MDB files not automatically imported** when the initial transfer from QDLend (the interim Lend program) to QuickDOC was made.

In particular, there have been cases where **Library records were not fully transferred**, for some reason, during the initial import. Because Library records to match the Codes are necessary to maintain relationships in the database, the import process creates records anyway, using the LIBID to mark the record, for any Library where the import failed to create the record. The result is a list of imported **QDLend Libraries** that look like this:

> ABCABCInstitution

> ABCDEFInstitution, etc.

Using this import choice will re-create those Library records using the correct data from **QDLend.MDB**.

The process is the same as with the External QuickDOC.MDB databases, above, except that it will be looking for a QDLend.MDB, and the process should be much quicker, since the QDLend.MDB database was much smaller and had fewer database relationships than does QuickDOC.MDB.

Old QD Data (DOS Ver)

Use this to import data from the old DOS Version of QuickDOC, which was used with DOCLINE up until July 17, 2000.

The first time you choose to import data from Old QD, the program will need to be directed to the folder in which the old QD files reside (after the first time, it'll remember where to look). Use the typical file and directory search boxes to find the directory you're looking for. When you get there you'll see a list of old QD files appear in the File List Box, as shown below.
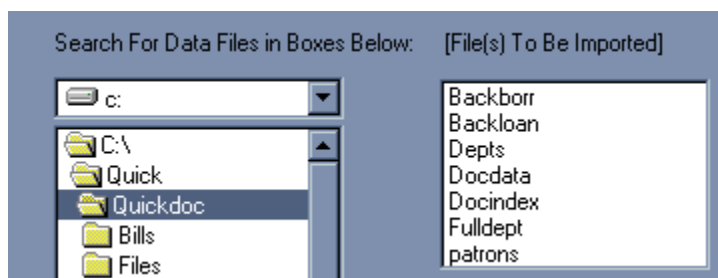
In order for QD4Win to be aware that the folder you navigate to has true old QD files, it looks first for two files which were in all old QD directories: **QDCOMMS** and **SETLIBID**. If it finds those, then it knows that any DOCDATA (Libraries) or BACKLOAN (Lends) files are correct ones. **If the folder you're trying to import from doesn't have these two files, then you need to copy them over as well as the back files, themselves**

Import Libraries from DOS Version

For your initial import, **first Import Libraries from old QD** by checking the **Libraries Check Box** and clicking the **Import Now button**. **It's necessary to get the Libraries first**, so that when you import the Lend data from old QD it will have Library (Borrower) records to refer to (otherwise, any record where the Borrower is not found will be assigned to a catch-all XXXNOT Library record, and there'll be much cleaning up to do).

The **Import Libraries routine tries to match the old QD Values with current DOCUSER values** first by searching under the old LIBID. If the **old LIBID was made up** (such as one of those 00000A values), it next tries searching for a likely match under Institution Name and State/Province. If no likely match occurs there, it next checks to be sure that there's no new DOCUSER record that has the same State-Country-Code combination and---if it looks clear---assigns the record that code. If that code might be problematic, the final choice is to use XXX plus the old 3-letter code, assuming it hasn't already been assigned to someone else.

As it's working, the import process produces a **Report of Libraries Imported From Old QD**, so you can double-check its decisions and, if necessary, correct them. The report has this format:

```
Monday, December 18, 2000          Report of Libraries Imported From Old QD - MAUBET

Added Old QD Library WYETH-AYERST RESEARCH (S-101)    Old Code: ACY
     To New DOCUSER Record: NYUACY; Wyeth Ayerst Research (S-101)

Added Old QD Library ADDISON GILBERT HOSPITAL    Old Code: ADD
     To Closest DOCUSER Match: MAUAGG; Addison Gilbert Hospital

Added Old QD Library US AGENCY FOR INTERNAT'L DEVELOP.    Old Code: AID
     To a Made-Up DOCUSER Value.  New Value: DCUAID; Us Agency For Internat'l Develop.

Added Old QD Library AMERICAN MEDICAL ASSOCIATION    Old Code: AMA
     To Closest DOCUSER Match: ILUAMA; American Medical Association

Added Old QD Library AMESBURY HOSPITAL/ATTN: ADMINISTRA    Old Code: AME
     To a Made-Up DOCUSER Value.  New Value: XXXAME; Amesbury Hospital/Attn: Administra
```

```
Added Old QD Library COLLEGE OF PHYSICIANS AND SURGEONS   Old Code: BCP
      To New DOCUSER Record: BCCBCP; College Of Physicians And Surgeons Of British Colu

Added Old QD Library CORNELL UNIV MED COLLEGE/SAMUEL WO   Old Code: BYC
      To New DOCUSER Record: NYUCOR; Weill Medical College of Cornell University
```
_____

In the report above:

2. The **first item** reports what is no doubt a **correct transfer**. The old code was ACY and the new is NYUACY. The old Institution name (in CAPS on the first line) matches the new name as retrieved from the DOCUSER file.

2. The **second item** shows a case where the code in old QD doesn't match that found in the new, but there's a **close enough match** to suggest the correct entry, so the new record MAUAGG is assigned.

3. The **third item** wasn't found in DOCUSER, so a **new LIBID is invented**, using the State/Province captured from old QD. No other DCUAID exists, so that value is assigned.

4. The **fourth item** found a **likely match** for AMA.

5. The **fifth** was for a Library in old QD with **no address information**. Since we can't tell which state or province this library is in, and we don't have an old LIBID (in the 12345A format---it's probably one of those 00000A Libraries), the only place to go is **XXX plus the old code**.

7. The **sixth** found the correct Canadian library (the old record no doubt had the correct old LIBID).

Finally, the **last item** might suggest a check. The old Cornell was filed under BYC, but it had a real LIBID (10021A), which was successfully looked up in the new DOCUSER file. This produced the hit on new LIBID NYUCOR. But the two names are sufficiently different that it might be wise to double-check before accepting this choice uncritically, just in case the old LIBID was entered incorrectly (although I think that this one was okay, but haven't had time to check!).

Import Loans

Import Items Loaned uses a similar approach to import Libraries. Check the **Items Loaned box** and click "**Import Now**" to begin.

 [One hint re: **Reducing the number of items to be imported from old QD**. If you don't want to get ALL the items in your old QD BACKLOAN file, use the Date box to restrict the dates imported to some later date. The default will be January 1, 2000, but you can change it as necessary. This will speed up the import process.]

Progress of the import shows in both the yellow comment box and on the Progress Bar at the bottom of the screen:
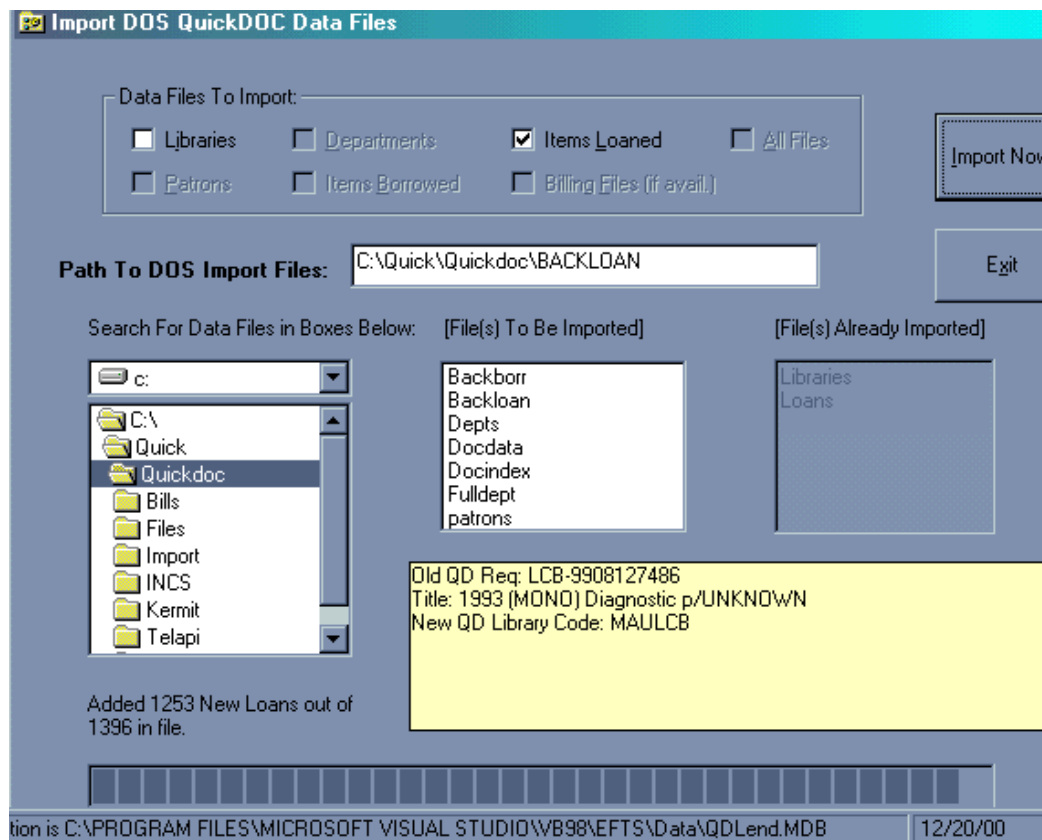
In the case above, the last record imported was a Monograph; 1253 items have been imported (out of 1396 in the file); and the Libraries and Loans have been imported previously (in most cases you'll only import Loans once, unless you have archived files from old QD you want to add.

```
Wednesday, December 20, 2000          Report of Loans Imported From Old QD - MAUBET

More than one match was found while searching ISSN for NATURE.
   Chosen Title: Nature.   ISSN: 0028-0836

Could not find Library for old Request Number LOW-9711204187 in file.
```

```
    Filed instead with Orphan Borrower XXXNOT.
```

_____

The **report of Loans Imported from Old QD** captures 2 situations: 1., if there was more than one match on a journal title, it lets you know, and 2., if it can't find an old Borrower in the new file it assigns it to a default value of **XXXNOT**. You can reassign these later, after creating the Borrower record.

Batch-Importing older Requests

QuickDOC always keeps **backup copies of DOCLINE Receipts and Borrows**, as well as **backup Loansome Doc Receipts** and **backup updates** for Receipts and LDX (Loansome Doc) Borrows filled at home.

These files are stored just beneath wherever the QuickDOC.MDB database is located, so that any machine using that database can access them.

If, for some reason, you find that there are batches of **records missing** from your database, and you can't find them in some other QuickDOC.MDB database located either on your C: drive or on some nearby network drive, you may be able to **re-import these DOCLINE records** from the **BackImp backup folders**. These folders will be just beneath the directory where your QuickDOC.MDB database is located (and we'll use the phrase **\QUICKDOCDB** to refer to the path chosen, so that it can substitute for any of the following):

Database on the C: drive, in the same folder as the QuickDOC Program (only if you need to):

> **C:\Program Files\QuickDOC**

Database on the C: drive, in some other folder from the QuickDOC Program (hard to justify):

> **C:\Wherever**

Database on the network, where the other files will be located as well (best choice):

> **S:\\Wherever**

Or: **H:\Wherever**   (another network---perhaps the Library Home Folder---choice)

In each of these cases there will be a **QDBorrow** and **QDLoan** folder just under the **database folder**, wherever that database folder might be located (and if you move that database folder, these subfolders will try to follow, but not all files may be relocated, because of dates and filenames, if the operating system resists that relocation).

Just beneath the QDBorrow and QDLoan folders, beneath wherever the QuickDOC.MDB database is located, you will find the **BackImp** folders.

The BackImp folders hold the complete downloaded files from DOCLINE during that year! It's a terrific **audit tool** for both Borrows and Loans, to check whether a Borrow or Lend item was saved or updated. You can track Borrows and Loansome Doc Receipts, along with Cancels, in the \QUICKDOCDB**QDBorrow\BackImp** folder and Library Lend Receipts (and DOCLINE Updates) in much the same way in the \QUICKDOCDB**QDLoan\BackImp** folder as by checking what's saved in that **BackImp** Import file for that period.

These files can also be used to re-import items that have previously been saved on DOCLINE but not yet been adduced into the database (or have been lost, for some reason).

Here are the steps to **re-import BackImp files** (using the year 2006 as an example):

1. In Windows Explorer, find the appropriate **\QUICKDOCDB** folder, as described above. Just beneath this folder you should find (for Borrow imports) a folder called **QDBorrow**, and underneath that a folder called **BackImp**. In BackImp look for a file called **2006BDat.txt**; it will probably be fairly large.

2. Open up **2006BDat.txt** and scroll down to the end. You'll see the dates at the beginning of each saved request. When you get down to Sep 25th or so (or whatever might be the actual cutoff date), select the rest of the records by holding down the Shift key and Paging Down to the end of the file. When all are selected, right-click the dark mass and choose Copy. You can close that 2006BDat.txt file after copying.

3. Still in Windows Explorer, move up to the **C:\QDBorrow folder**. See if there's already a file called **QDPBData.txt** in there. If there is, open it, scroll to the end, and paste in the saved part of 2006BDat.txt.

If there isn't, click File, New, Text File on the Menu Bar, and create the new text file named **QDPBData.txt**. Open it up and paste in the saved text.

[The Borrow BackImp folder also contains **backups of Loansome Doc Receipts**, in the filename **2006LDX.txt**. Copy a selection of these up to C:\QDBorrow**QDPPLX.txt** to perform the same re-import function for Loansome Docs.]

4. For Lends, the process is the same, except that we're looking for a **QDLoan\BackImp folder** under the **QUICKDOCDB** folder. In this folder look for the file **2006LDat.txt**, along with its partner, the **backup of Lend Update actions**, which is in the file **2006LUpd.txt**.

If you need to, you can use the copy and paste method above to move sections of these files to:

> **2006LDat.txt** ---> **C:\QDLoan\QDPLData.txt**
>
> **2006LUpd.txt** ---> **C:\QDLoan\LendUpdt.txt**

5. Once these files are made, just open up QD and click the Import button. This will add them to the database. Because the two Lend Import files contain the action taken as well as the initial data, they can update themselves.

6. For re-imported Borrows, however, you'll have to mark those Borrows as Received (or Not Filled, as appropriate) because they'll all come in as Outstanding. If you have paperwork, you can change the Received Date to the correct date, or you can just check them in, but be aware that they'll get counted in the month shown in the Rec'd Date, so just checking them in will count them all as received today, which is not what you probably want.

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OCLC Import Function

Version 2.1.8 included the ability to import items from the OCLC end-of-month reports for both Borrows and Lends. Because we don't have the same control over the format of fields as we enjoy in DOCLINE requests (where NLM controls the format), we have additional responsibilities in the OCLC Import function. In order to use the OCLC Import feature, you must:

1. Be a user of OCLC and receive reports in the **Excel** format;

2. Have **Microsoft Excel installed** on the machine on which you're doing the Import;

3. Save the Excel file(s) to the **Import folder**, located just beneath wherever your QuickDOC.MDB database is located (usually on a shared drive or just beneath the QuickDOC Program folder on the C: drive if you're using just one machine to run QuickDOC).

4. Be prepared to choose new **OCLC Libraries** from a list (or to create them using a specific format for OCLC-only libraries) during import. Once a library is created, or an OCLC symbol is assigned to an existing library, then the OCLC Import function won't need to stop again the next time that library is encountered.

5. Be prepared to choose the **OCLC Patron Name** from a list if the Last Name, First Name on the OCLC item doesn't match that in the Patrons Table. Also try to use the same Dept abbreviation on OCLC that you use in QuickDOC, since that also improves the odds of getting an accurate match on the Patron without your having to choose from the list each time.

6. Be prepared to do a brief inspection after each import to catch any anomalies that might occur. In particular, you will want to check:

   a. The **Title field**, to be sure that it contains a Journal (or Monograph) Title. Occasionally, libraries seem to leave this field blank, assuming that you'll identify the title from other fields, or else it's skipped in the report for some other reason---look for Titles with **(None)** in the cell after import;

   b. The **Article Author** and **Article Title** fields are both contained in the **OCLC Article (Citation) field**, separated by a colon, a single quote, or some other character. If we can standardize on the **colon** as our separator for Borrows, and encourage those who borrow from us to do the same, it will make parsing this field much more accurate, but in the end we can't entirely control the format used by other libraries;

   c. QuickDOC Import will use the **OCLC Ship Via** column to infer **Delivery Method**, but since there is no equivalent column for Lends, it will use a default, which may need to be edited if the actual Delivery Method is different from the default;

   d. The **Number of Pages field** kept for Borrows, which may be used for Copyright Clearance Center payments; QuickDOC computes this automatically from the Pages part of the citation, be sure to use the normative 223-33 or 223-233 when creating your Borrow requests (as opposed to 223-EOA or similar shortcuts).

OCLC Resource Sharing Reports

QuickDOC uses the **OCLC end-of-month Resource Sharing Reports**, released a week or so after the end of each month in Excel format, to do the data import. While there are a variety of reports in the OCLC system, only two are supported for importing purposes.

Lender Resource Sharing Stats Report

On the Lend side, we use the **OCLC Lender Resource Sharing Stats Report**, which begins as shown below:

QuickDOC Import inspects the column headers (**Borrower Symbol**, **Borrower Full Name**, etc.) to be sure we're getting the correct resource-sharing report and will raise an objection if the columns aren't what it expects them to be:
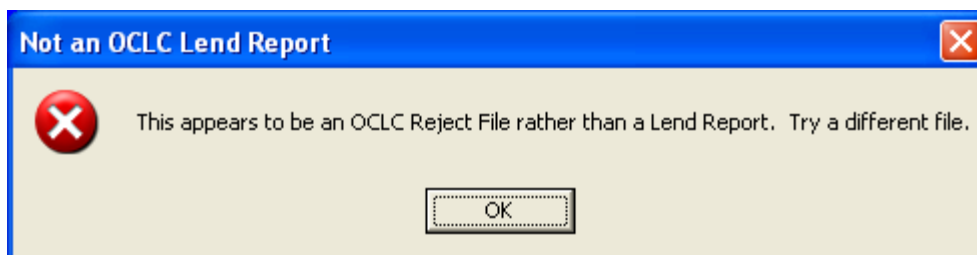
Borrower Resource Sharing Stats Report

On the Borrow side, we use the **OCLC Borrower Resource Sharing Stats Report**, which begins as shown below:

As with the Lender Imports, QuickDOC inspects the column headers (**Lender Symbol**, **Lender Full Name**, etc.) to be sure we're getting the correct resource-sharing report and will raise an objection if the columns aren't what it expects them to be.

Machine running the Import must have Excel installed

Because QuickDOC needs to open the Excel file to process the import data, the machine on which you run the import must have a copy of **Microsoft Excel** installed on it. No particular version is required; QuickDOC will use whichever version the computer may be using. If you try to open an **.xls** file on a machine where Microsoft Excel isn't installed, you'll get an error message:

> **This import process can only be run on a machine with Microsoft Excel installed. Exit and try again on another machine.**

Save the OCLC report files to the Import folder

Save the Excel file(s) to the **Import folder**, which is located just beneath wherever your QuickDOC.MDB database is located (usually on a shared drive or just beneath the QuickDOC Program folder on the C: drive if you're using just one machine to run QuickDOC). Here's what the folder will look like in Windows Explorer when the database is located on the S: drive, in a folder called QuickDOCDB:

All files in the Import folder are listed in Windows Explorer. Some are Borrow, some Lend, others neither.

Be sure to name your files precisely, when you're downloading from OCLC, since you'll want to find the correct files when it's time to do the import.

The defaults you'll get from OCLC are filenames along the lines of:

ill_borrowerIllManagementStats—ABC—200610.xls (where ABC is your OCLC Symbol).

In saving this file to the QuickDOCDB\Import folder, it's probably smarter to truncate it to:

> **ILL_Borrower200610.xls** (for Borrows) or,
>
> **ILL_Lender200610.xls** (for Loans)

just to make the files easier to locate when you're ready to import.

Performing OCLC Imports

OCLC files are imported under the Import choice of the QuickDOC File Menu:
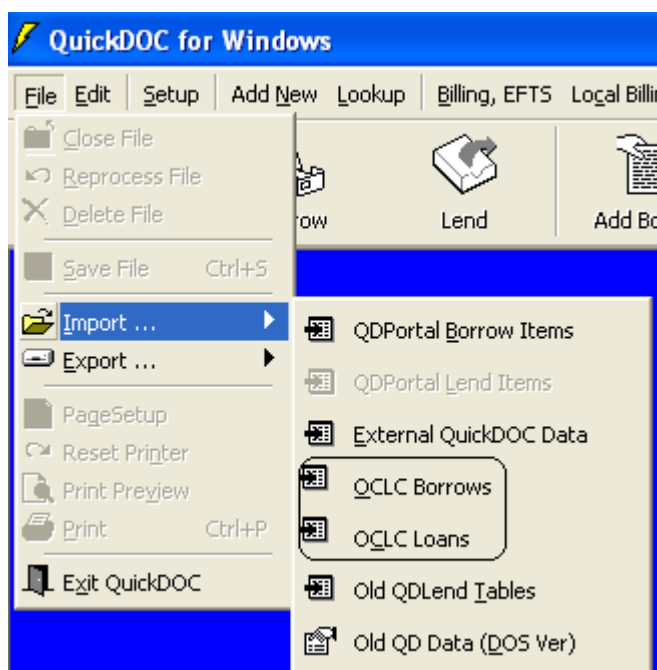
Choose **OCLC Borrows** or **OCLC Loans**, based on the file you want to import. Either choice will show you the same group of files (since they'll all be in the Import folder), but the OCLC Borrows choice sets up QuickDOC to expect a Borrow File, so a Loan File will fail, and vice versa.

After choosing the correct file to import (such as the Borrow File below), click **Open** to start the import.
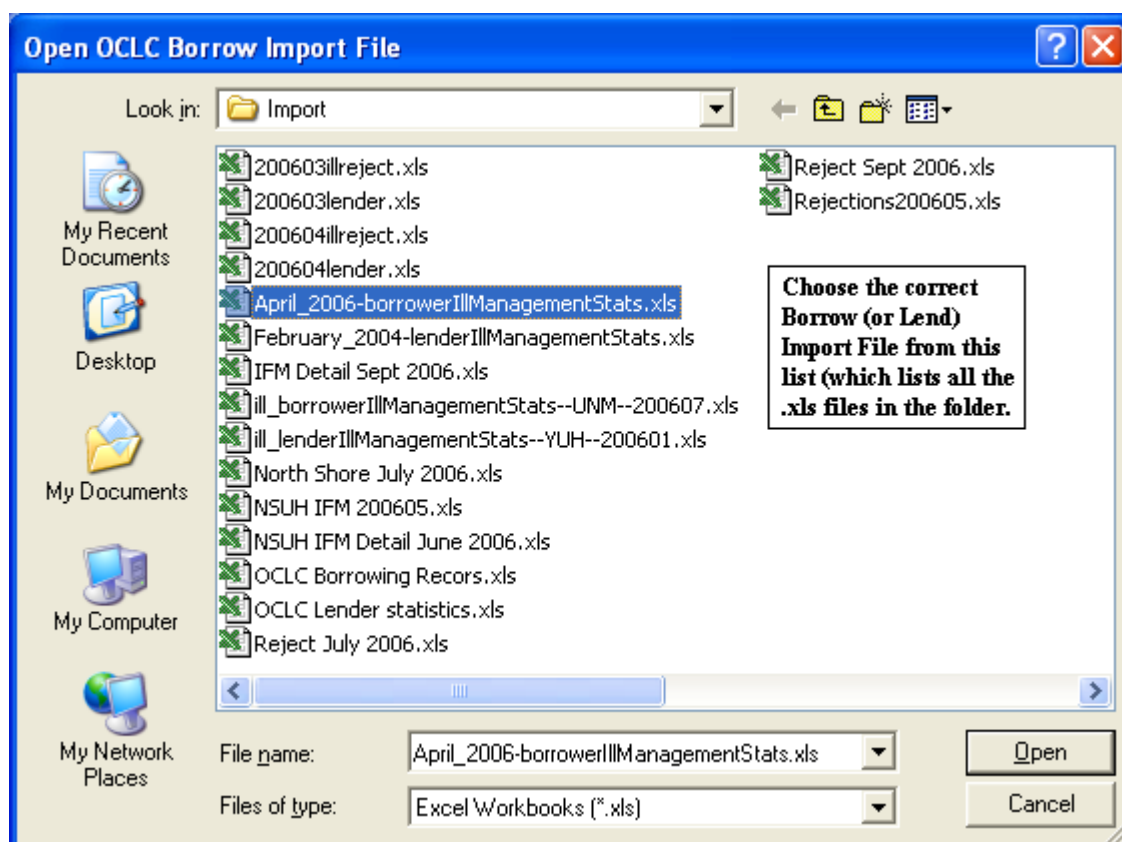
Unlike the QDPortal/DOCLINE imports, where we are fairly sure of the format in which requests will arrive, and where we can create Library and Patron records on the run, if we need to, there's no such guarantee for OCLC records. Lend records may come in a variety of formats, and there will be no Patron Number to give us certainty as to the Patron record. There are some tricks, however, that we can use to make the import as seamless as possible.

OCLC Lend Imports

OCLC Lend Imports are actually a bit less complicated than Borrows, but there are still situations to watch out for.

Stop to Select Library Record.

First of all, the Import process will ALWAYS stop if it doesn't find an **OCLC Symbol** in the **tblLibs** Table of the **QuickDOC.MDB** database. It will show you three pieces of information:

1. The **text of the request** so far, in the yellow box in the middle of the form;

2. A **suggested OCLC LIBID** in a text box at the left; and

3. A list of 7235 **DOCLINE Libraries**, sorted by Institution.
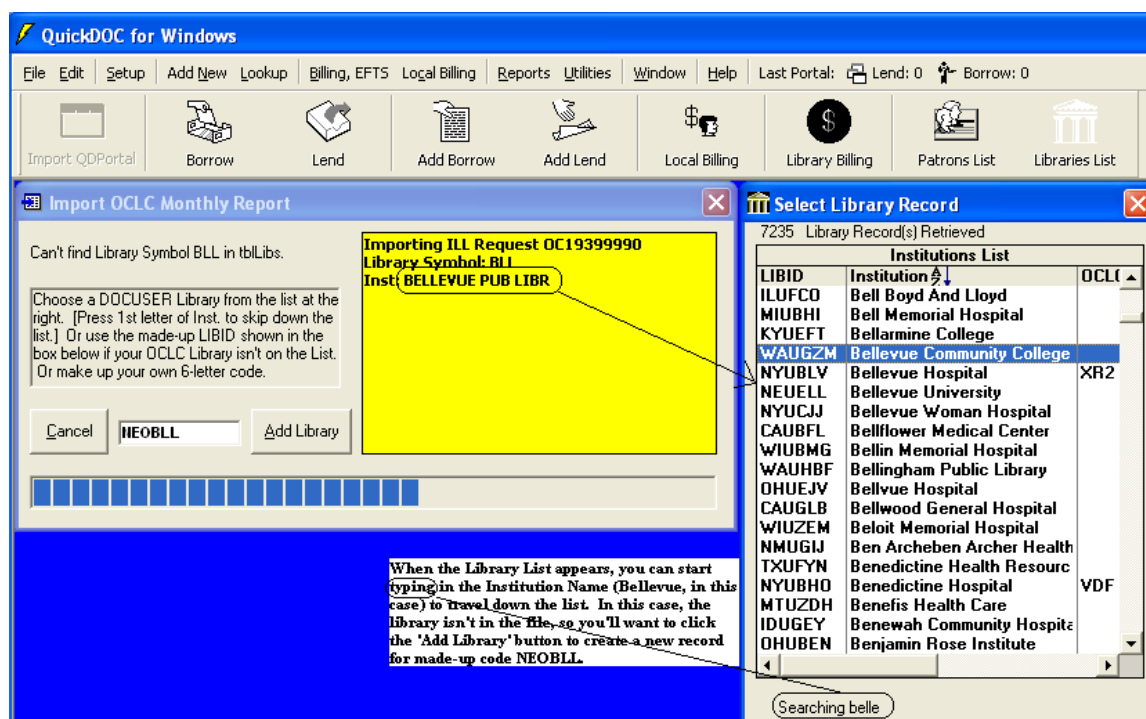
Once the list of DOCLINE Libraries is displayed, you can use the Scroll Bar to move down the list, but a better choice is to just **start typing the Institution Name** (Bellevue Pub Libr, above). As you can see, by the time we've typed **'belle'** it's clear that **Bellevue Public Library** isn't on the list. Not too surprising.

Creating an OCLC Library Record.

In the case above, there isn't a record in the NLM database (though, don't forget, it was created back in 2000, so conceivably the Library could have been added in 2001!) for the Bellevue Public Library. So we'll want to create one. QuickDOC suggests **NEOBL**L, which is a composite of the **State** (**Ne**braska, which we know from the file), the letter **O** (to signal that this is an OCLC Library,

not like those found in the NLM Institutions List, with **U** or **C** or even **X**---which signifies a library in a non-Canadian and non-US part of the world---in that spot), plus the **OCLC Symbol (BLL)**.

General rules that QuickDOC uses in creating an **OCLC Library Record** to match the NLM LIBID format:

1. Use the **State/Province** abbreviation as the **first two letters**;

2. Use **O** as the third letter, to designate an OCLC Library;

3. Use the **last three digits** of the library's OCLC symbol.

In most cases it's probably smart to assume that, even if you find a close match on the Libraries List, with no matching OCLC Symbol (by definition, of course: if it had been in the file we wouldn't even be looking at the list), and if it's a fairly large institution, then it could likely be a different library within that institution than the one listed in DOCLINE (otherwise our initial upload of OCLC Symbols would have found it).

This isn't always the case, of course. Here's the screen that pops up for **OCLC symbol COR**:

You could go with either one here, I would think. Turns out that **Regis College** in the list is now **Regis University**, so the **COURGS LIBID is correct**. But it would be hard to fault someone for choosing the new **OCLC version (COOCOR)** of the LIBID. There's a brief discussion below on more advanced methods for choosing the right library record, but I'm sure that most will choose the path of least resistance, especially since you can always merge those library records later.

In any case, to **select the Library Record COURGS** above, **double-click that line in the list**. That will bring the COURGS code over to the text box on the left. Then click the **Add Library** button to continue on.

To recap: When the **Select Library Record** list pops up (in either Lend or Borrow), do the following:

1. **Start typing the Institution Name** (in the yellow box)

2. If it pans out (i.e., the Institution/Library is on the list):

a. **Double-click that line** to move the code over to the **Add Library box**;

b. Then click the **Add Library** button to accept what's in the box.

3. If not:

a. Just click the **Add Library** button to accept what's in the box.

Another example of how you might choose from the list, when the list, itself, or the truncated OCLC Institution Name, might be less than you'd want:

A lot of this is just local knowledge, so you should feel free to choose what seems best in your situation. And always know that you can re-map any miscreated records if you need to.

Foreign Library OCLC Records.

Unfortunately, the list of Libraries presented in the **Select Library Record** list was downloaded from the NLM DOCUSER database back in 2000, so it's not very useful to other than US and Canadian Institutions, with a few exceptions. Nevertheless, it's a good start, and in the case of OCLC Libraries, we're dealing with non-DOCLINE libraries in most cases, so it makes sense to lean toward creating OCLC-type LIBID standards in most cases.

American OCLC Library Default Structure. These will defer to the NLM Institution record structure, e.g., the MAUABC LIBID type, except that the **U** in the third position will be replaced by an **O**.

Canadian OCLC Library Default Structure. These will defer to the NLM Institution record structure, e.g., the ONCABC LIBID type, except that the **C** in the third position will be replaced by an **O**.

European OCLC Library Default Structure. OCLC Libraries with **EU** in the State/Prov Code will defer to the NLM Institution structure: e.g., **EUXABC** LIBID type, except that the **X** in the third position will be replaced by an **O**.
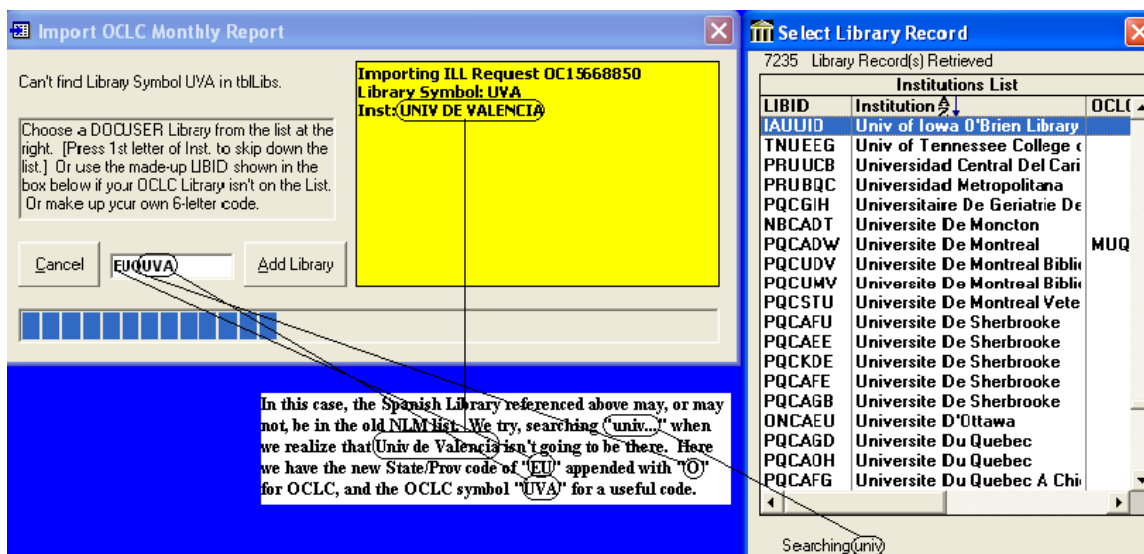
Beyond that, when records are created for these libraries, both the **State/Province** and **Country** fields will be populated **"(None)."** You'll need to edit these later with their proper Provinces and Countries, or if you only deal with them via **IFM** then you can wait, but you'll probably want to know at one time.

Asian OCLC Library Default Structure. OCLC Libraries with **AS** in the State/Prov Code will defer to the NLM Institution structure: e.g., **ASXABC** LIBID type, except that the **X** in the third position will be replaced by an **O**. Beyond that, when records are created for these libraries, both the State/Province and Country fields will be populated "(None)." You'll need to edit these later with their proper Provinces and Countries, or if you only deal with them via **IFM** then you can wait.

Final Rules for Constructing Library OCLC Records

Gathering the rules from U.S. Libraries along with those attached to non-US Libraries, we can finally assign these general rules that QuickDOC uses in creating an **OCLC Library Record** to match the NLM LIBID format:

1. Use the **State/Province** abbreviation as the **first two letters**;
2. Use **O** as the third letter to designate an OCLC Library;
   a. Or **P**, maybe, see #3, just below
3. Use the **last three digits** of the library's **OCLC symbol**;
   a. Or if the State/Prov + O + the last 3 digits of the OCLC Symbol aren't unique then
   b. Change the **O** to a **P**, to create a new record.

Check the Journal Title/Citation Import.

First of all, the Import process will **ALWAYS** have some defects. The easiest to check is the **Journal Title. (None)** is an obvious red flag (although it's usually correct: the Borrower has not completed that field---for whatever reason).

As you can see here, QuickDOC Import has failed to identify the Journal Title, but with fairly good reason: there wasn't one in the report. Perhaps it was stored in some other field? In any event, all you can do here is to check any original documentation and then edit the record appropriately.

Lend Journal Title Not Found (in CAPS)

More likely, as you do your review after importing, you'll notice that some Journal Titles appear in CAPS, rather than their usual formats. This makes them very easy to pick out.

Holding the cursor over the Title cell will show the complete entry in a cell tip, as above. Sure looks like a journal from here. We may need to add it to the tblJrnls Table in QuickDOC.MDB. First check what's there. If we're in the Title cell (which will show an azure background if we are, as it does above), it will expose a **To Jrnls** button at the upper right of the grid.

Clicking the To Jrnls button brings us to the Journal record (although in this case it's filed as a monograph, which record, by the way, you can't change---you can only replace it with another).

To make the change, click **Clear Form**, then type in Kathmandu in the Title box and click Search. Nothing.   Clear the form again, just to be sure, in preparation for adding this title.

Click the **New Title button** to prepare for data entry. First we'll need accurate info on the Journal, itself. It's not there in the OCLC Report (the fact that it's in CAPS means that no ISSN existed), so try using QDPortal to check the Serials file in DOCLINE. You can open a copy of QDPortal while QuickDOC waits here, in the background, if QDPortal isn't already open.

Here's what we enter into the **Serial Holdings Search form**:

The result is we get the info, with NLMUI, ISSN and general dates:

All we need to do now is to enter the data into the Add/Edit Journals form, and save it. Be sure to use the usual QuickDOC Journal abbreviations when you enter data (like the j instead of journal, below), both in the Title and Title Abbrev fields. The list will appear on the left as you're entering data.

Click Save to add the Journal to the Journals Table. You'll be brought back to the grid and the changes will have been made:

	OC15736909	NYOYYP	▾	2004	Kathmandu universit	$15.00	Jou	Cc	No
	OC15740989	GAOGAT	▾	2005	IRMA Pakistan Me	$15.00	Jc	Cc	No
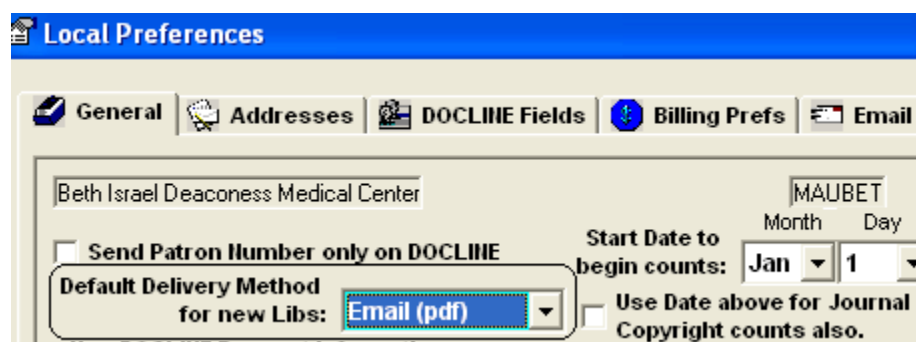
Just click into the next row to save them.

Also check the **Review OCLC Import** process below for some other suggestions for quality control.

Delivery Method problem in Lend

Unlike the Borrow side report, which at least has a **Ship Via** field that we can use for Delivery Method, the Lend report has no column for Delivery Method. Our solution is to look up the **Preferred Delivery Method** in the Library record and use that for each imported record. Unfortunately, the old default in QuickDOC was always **Mail**, so your current library records are probably predominantly set to Mail as Preferred Delivery Method.

In order to make this default more flexible, you can now set it in **Local Preferences**, on the General Tab:
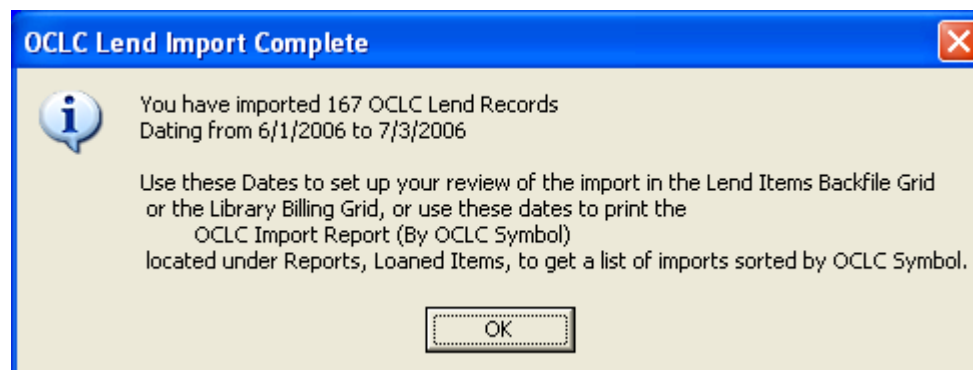
It will default the first time to Email (pdf), but you can change it to anything on the list. From that point on, any new library created will be assigned the default preferred delivery method.

Even with using the library's preferred method, there's no reason to believe that this was the way this request was delivered, so the best practice is probably to edit that field while doing your post-import inspection.

OCLC Lend Import Totals

At the end of each import session, you'll see a Message Box with the session totals, along with the **First Date** and **Last Date** of the items imported. Note these values to set up your **review** of the import.

In the case above, you'd set your **Beginning Date** to 6/1/2006 and **End Date** to 7/3/2006 in the Lend Item Backfile to search requests **beginning with OC**.

When you come to check your **OCLC Lend Import**, you'll want to set the **Lend Item Backfile Grid** as follows (substituting 6/1/2006 – 7/3/2006 for the 1/3/2006 – 2/1/2006 values shown below):

OCLC Import Report (By OCLC Symbol)

If you record your **OCLC Lends** by their **OCLC Symbol**, as opposed to a chronological file, or a file by **OCLC ILL Number** (both of which you can easily replicate in the Library Billing Grid), you may find that it isn't easy to check your loaned items and payments in the Library Billing Grid, where the sorts are by LIBID and the OCLC symbol isn't anywhere visible.

If this is the case in your library, use the OCLC Import Report (By OCLC Symbol) to print out a list of the imports in your latest batch. Jot down the beginning and end dates displayed in **the OCLC Lend Import Complete** Message Box…
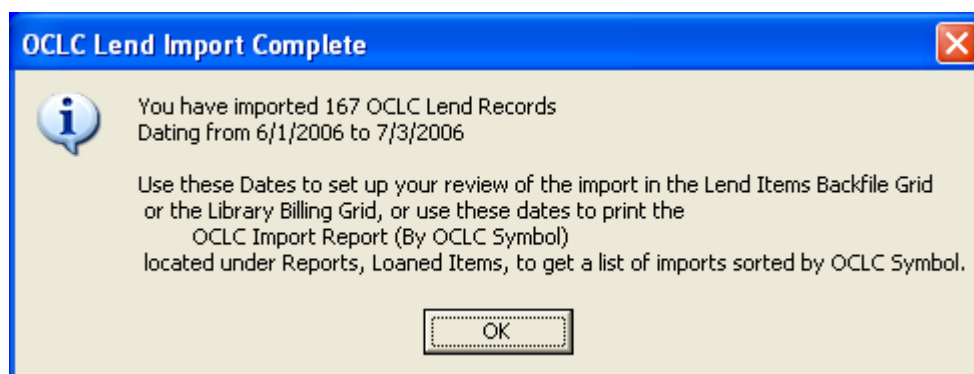
… and reserve them for printing the report under Reports, Loaned Items, OCLC Import Report (By OCLC Symbol).
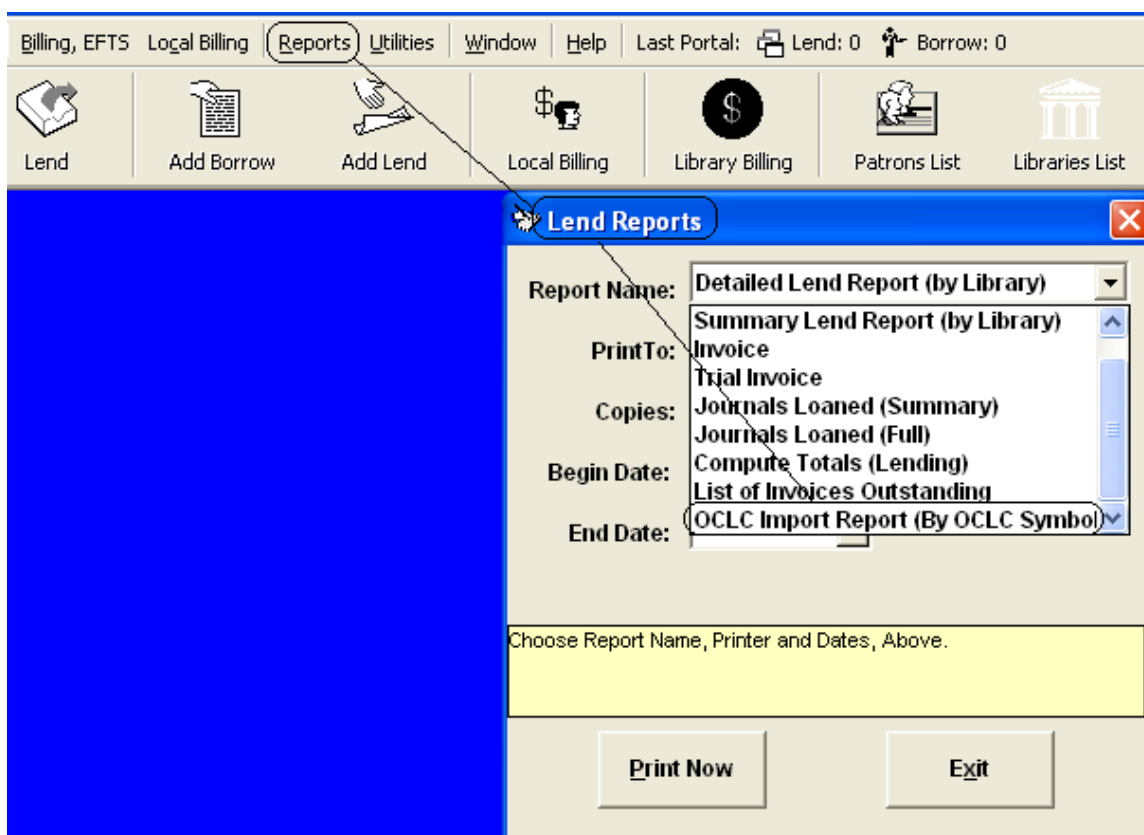
The report begins as follows, sorted by OCLC Symbol, with the LIBID (not necessarily the NLM LIBID) assigned shown, and with a subtotal for each library. You can use this report to reassign OCLC Symbols to LIBIDs, to check that appropriate libraries are assigned to appropriate codes, to check that Library Charge Profiles are accurate, and also to check that the OCLC symbol is assigned to the appropriate library record.

OCLC Import Report (By OCLC Symbol)
01-Jun-06 to 03-Jul-06
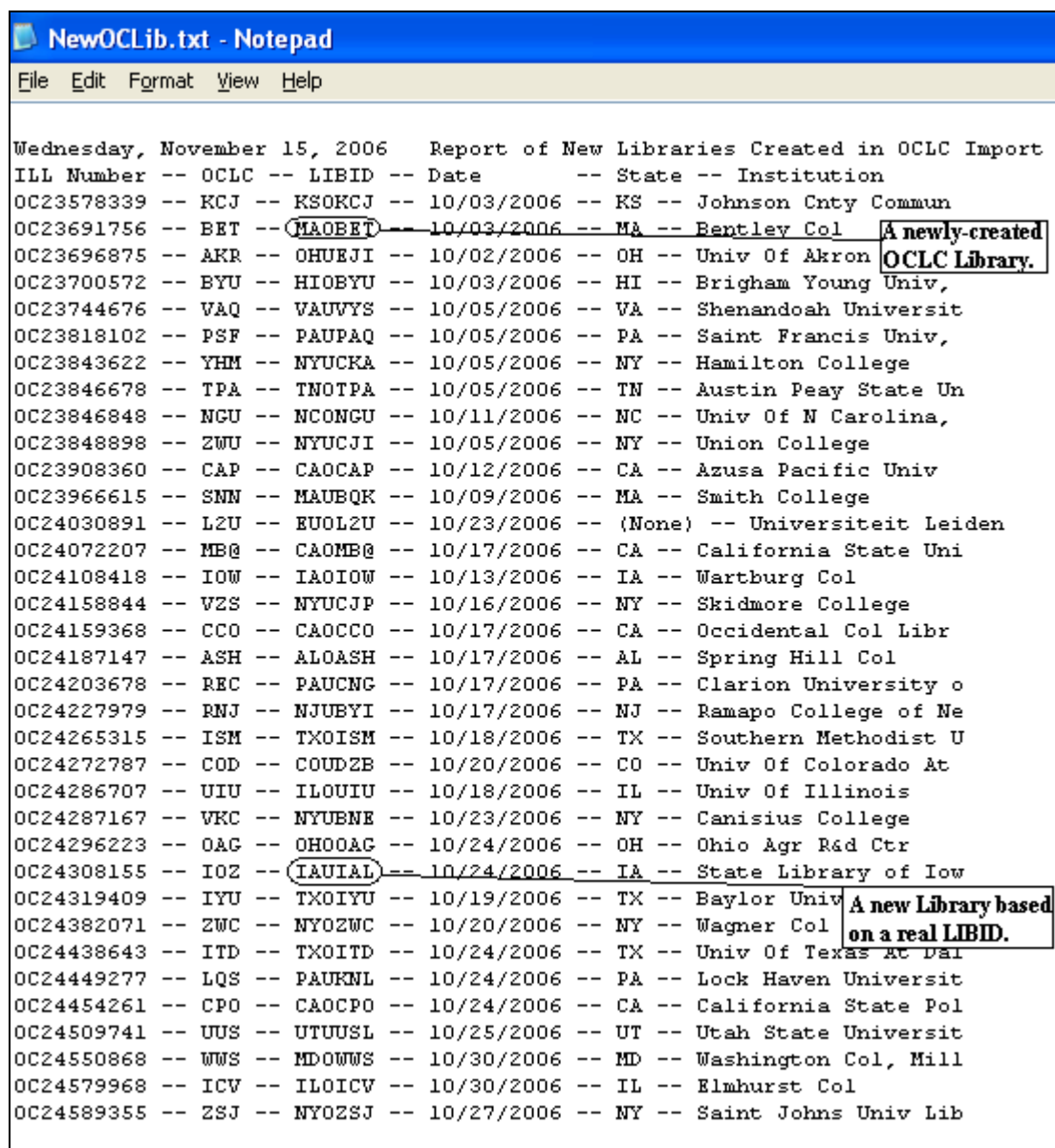
1-Mar-2007			Beth Israel Deaconess Medical Center (01-Jun-06 to 03-Jul-06)			Page 1
Item	OCLC Symb. ReqNo		Date	Title	Citation	Charge
	ACB (LIBID = ALUSOA)					
1	ACB	OC20693536	13-Jun-06	2004 J geriatric physical therapy.	27(1):16-EOA	$15.00
Total 1 Items For University Of South Alabama (No Groups Assigned)					**Total Charges For ACB:**	**$15.00**
	AFU (LIBID = ARUFOS)					
1	AFU	OC20475659	01-Jun-06	2001 Ochsner j.	3(4):233-	$15.00
2	AFU	OC20572271	07-Jun-06	2004 Clinical cornerstone	6(2):17-30	$15.00
3	AFU	OC21009287	23-Jun-06	2005 Curr pharmaceutical design	11(19):2405-	$15.00
Total 3 Items For Univ Of Arkansas, Fayetteville (No Groups Assigned)					**Total Charges For AFU:**	**$45.00**
	ASU (LIBID = AROASU)					
1	ASU	OC20559388	06-Jun-06	2005 Bratislavské lekárske listy	106(8/9/2007):281-6	$15.00
Total 1 Items For Arkansas State Univ - Jonesboro (No Groups Assigned)					**Total Charges For ASU:**	**$15.00**
	AUM (LIBID = MAUBQG)					
1	AUM	OC20494990	01-Jun-06	1997 Australasian biotechnology	7(5):296-299	$15.00
2	AUM	OC20981006	21-Jun-06	2006 Acta biochimica et biophysica sinic	38(4):287-291	$15.00
3	AUM	OC21160222	28-Jun-06	2006 Am J physiology. Renal physiology	290(2):F251-261	$15.00
Total 3 Items For Univ Of Massachusetts Amherst (No Groups Assigned)					**Total Charges For AUM:**	**$45.00**
	BIM (LIBID = MAUBMI)					
1	BIM	OC20630628	07-Jun-06	2002 Curr pharmaceutical design	8():2139-EOA	$15.00
Total 1 Items For Biomeasure Incorporated (No Groups Assigned)					**Total Charges For BIM:**	**$15.00**
	BNG (LIBID = NYUCKR)					
1	BNG	OC20599609	06-Jun-06	2006 Eur J emergency medicine	13(1):32-EOA	$15.00
2	BNG	OC21051248	23-Jun-06	2004 World of Irish nursing	12(11):23-EOA	$15.00
Total 2 Items For State University of New York (SUNY) (No Groups Assigned)					**Total Charges For BNG:**	**$30.00**
	BUF (LIBID = NYOBUF)					
1	BUF	OC21168186	28-Jun-06	2005 Bipolar disorders	VOL 7((SUPPL1)):8-15.	$15.00
Total 1 Items For SUNY At Buffalo (No Groups Assigned)					**Total Charges For BUF:**	**$15.00**

This report is presented alphabetically by OCLC Symbol, and subtotaled accordingly. You'll see a total of all OCLC Import items at the end.

1-Mar-2007			Beth Israel Deaconess Medical Center (01-Jun-06 to 03-Jul-06)			Page 8
Item	OCLC Symb. ReqNo		Date	Title	Citation	Charge
	XFF (LIBID = WAUHBE)					
1	XFF	OC20680773	13-Jun-06	2004 Psykhe	13(2):213-230	$15.00
Total 1 Items For Western Washington University (No Groups Assigned)					**Total Charges For XFF:**	**$15.00**
	Y9I (LIBID = ZZOY9I)					
1	Y9I	OC20639211	07-Jun-06	2004 Etude de la population africaine	19(SUPPL.A):201-219	$15.00
Total 1 Items For Univ Of Pretoria, Theology (No Groups Assigned)					**Total Charges For Y9I:**	**$15.00**
	YPM (LIBID = NYUSNU)					
1	YPM	OC20605776	06-Jun-06	2006 Neurorx.	VOLUME 3(ISSUE 2):207-216	$15.00
2	YPM	OC20742102	13-Jun-06	2006 Neurorx.	VOLUME 3(ISSUE 2):207-216	$15.00
Total 2 Items For SUNY Col At Plattsburgh (No Groups Assigned)					**Total Charges For YPM:**	**$30.00**
	ZCU (LIBID = NYUCEV)					
1	ZCU	OC20771039	13-Jun-06	1996 ISSUES IN MEDICAL ETHICS.	VOL: 4 NO: 2():51-53	$15.00
2	ZCU	OC21236552	03-Jul-06	1994 Mastozoologia neotropical.	10 (1)():133-139	$15.00
Total 2 Items For Columbia University (No Groups Assigned)					**Total Charges For ZCU:**	**$30.00**
	ZYU (LIBID = NYUCCI)					
1	ZYU	OC21022502	22-Jun-06	2003 J supportive oncology.	1(3)():175-91	$15.00
2	ZYU	OC21140804	27-Jun-06	2002 Int pediatrics	0.7111111111111111():203-208	$15.00
Total 2 Items For New York University (No Groups Assigned)					**Total Charges For ZYU:**	**$30.00**
TOTAL ALL ITEMS: 167			**TOTAL LIBRARIES: 109**		**TOTAL ALL CHARGES:**	**$2570.00**

New OCLC Libraries Report

At the end of each import session, much like the similar function in QDPortal Import, you're given a message if any new library records were created during the session. The purpose here is to give you a list you can use to identify the new libraries, so that you can edit these new records to add Address, Charge, Group data, etc. The **OCLC New Libraries report** is a bit more concise than the QDPortal version, and it can be found in the same folder as the QDPortal version, in the folder QDLoan just beneath wherever the QuickDOC.MDB database is located, but with the new name **NewOCLib.txt**.

You can always find this under **Utilities**, **Loan Log Files**, on the **QuickDOC Menu Bar** if you don't want to check it out directly after importing.

Printer Settings for All Notepad Log Reports

All the reports in this section, and most other **Log Reports**, print to Text Files that will be opened with either **Notepad** or **WordPad**.

If your report **word-wraps**, you might try setting your Notepad values to minimize the **font size**. A typical setting for Notepad might be as follows:
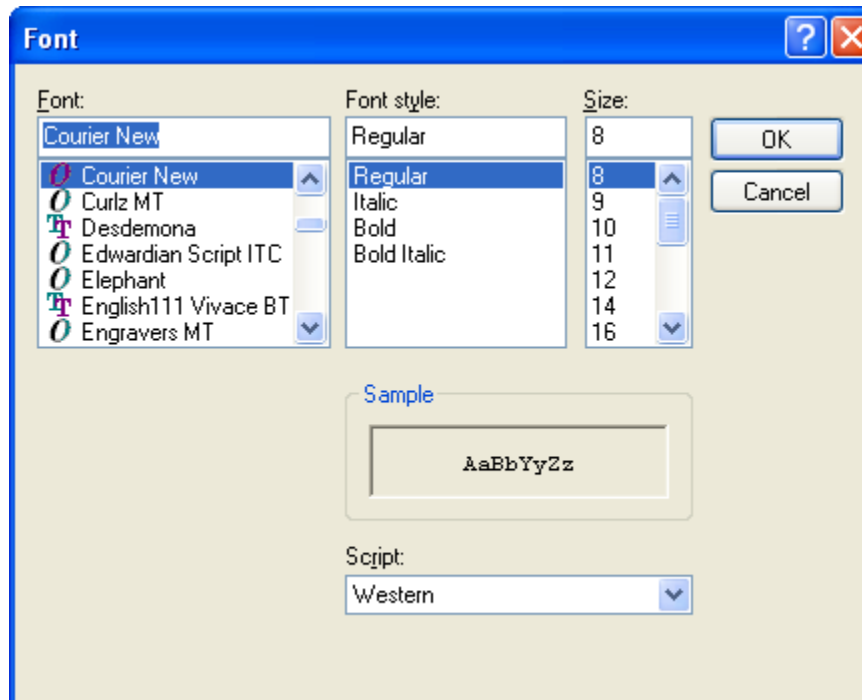
These settings work for me to get the printout above, but you may need to experiment with your own to get the results appropriate for your situation, but I would definitely go for the lowest font size possible in Notepad, so that the most information possible is included on the same line as the Request Number.

OCLC Borrow Imports

OCLC Borrow Imports have additional Patron stops (along with the Library stops), so they may repay some additional information.

Stopping to Select Library Record in Borrow.

As in Lend, QuickDOC will ALWAYS stop if it doesn't find an **OCLC Symbol** in the **tblLibs** Table of the **QuickDOC.MDB** database. It will show you three pieces of information:

1. The **text of the request** so far, in the yellow box in the middle of the form;

2. A **suggested OCLC LIBID** in a text box at the left; and

3. A list of 7235 **DOCLINE Libraries**, sorted by Institution.

The process is pretty much the same as that described in Lend, above.

Patron Importing

Patron importing is a bit more challenging than Library importing, since there can be so many variations. In DOCLINE, QuickDOC uses a distinct **Patron Number** (you'll see it in [brackets] on the printed request) to identify the exact patron record involved. In the OCLC Patron matching process there is no easy way to do it. So we basically try to match the **LastName**, **FirstName** and **Department**, to be sure of a match. If one of the three doesn't match, then you'll see a **Select Patron List** similar to the **Select Library List**. This is to ensure that we don't create

duplicate Patron records. If you see the correct patron on the list, you can select that record to assign this request to that Patron.
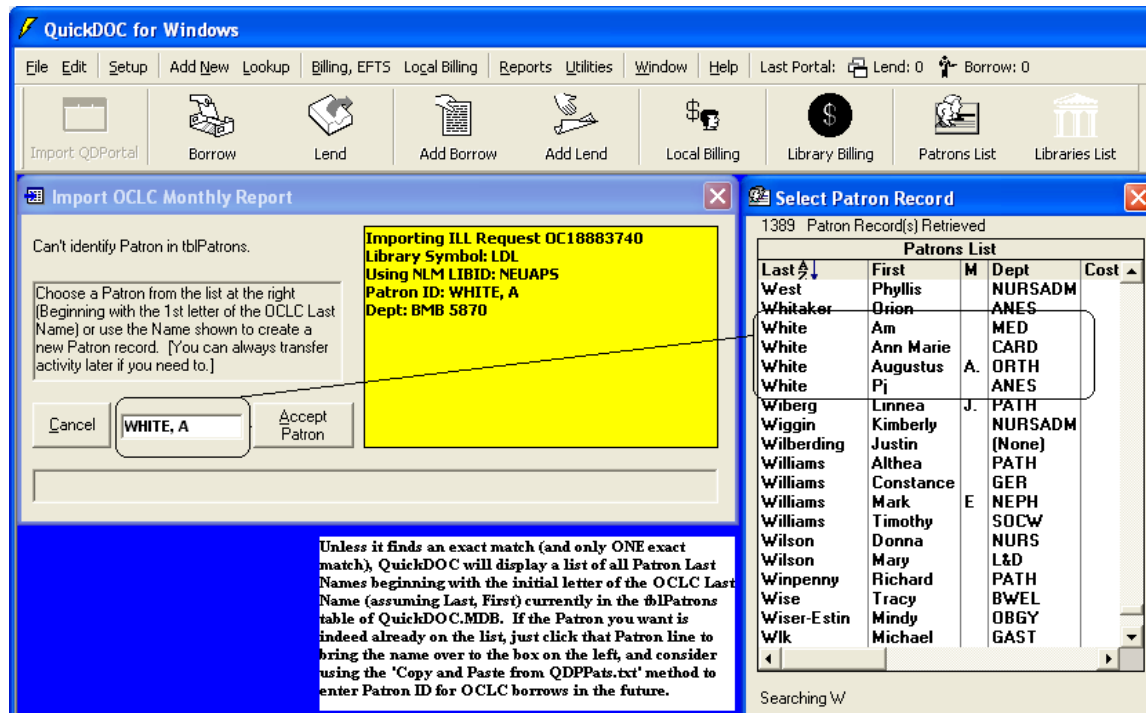
Assuming we want to assign this request to Augustus White, you would **double-click** (not just click, as the box above states) his line to bring his information over to the **Accept Patron Box** on the left.
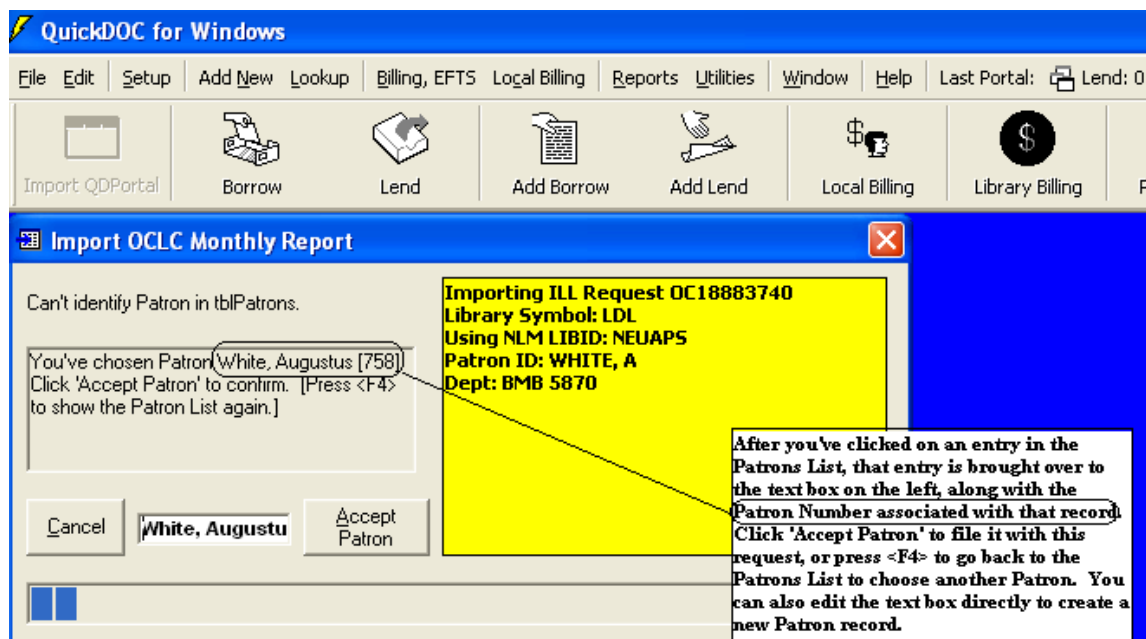
At this point you'll see the Patron's real name in the box (it's also appended with the [758], although you can't tell by looking, which is why it's shown in the information space just above the box). Click the **Accept Patron button** to move on.

In most cases, though, when you see the Select Patron List it's because the Patron isn't in the file. But it's still useful to double-check, unless you're sure it's a new patron. The Select Patron List always begins with the first letter of the patron's Last Name, and that letter always appears in the "**Searching**" tag at the bottom.

In the case above, there's no need to search further, since it's apparent that this patron isn't on the list. Just click Accept Patron to add him to the Patrons Table.

If the Patron name isn't near the top of the alphabetical list, start typing the rest of the name until that part of the list is revealed.

Don't forget that the **first letter will already be in there**! If you do, you'll find yourself searching **WW** instead of **WH**. If you do make a mistake, just press **Backspace** to return to the original search string. In fact, if you backspace to clear the string entirely, you'll get access to the entire Patrons List.

This strategy also works if QuickDOC misinterprets the Last Name and puts you at the beginning of the wrong first letter.

If you want to search V instead of B (as you should), just backspace over the B and type in V.

This will bring you to the correct part of the list. (I've corrected that **van** problem since this happened, but I'm sure there will be something similar in another context.

BEST PRACTICE: If your Last Names, First Names, and Departments entered on OCLC match those in QuickDOC's Patrons Table (or in the **QDPPats.txt file** used by QDPortal, which always reflects it), then you'll only see the Select Patron List for new Patrons, where you can just click Accept Patron and move on.

FURTHER HINT: Each time a new Patron is added in QuickDOC, a text file located in your QDPortal Program folder called **QDPPats.txt** is rewritten, with an alphabetical list of Patrons, along with their Patron Numbers. Your file will look something like this:

```
QDPPats.txt - Notepad

File  Edit  Format  View  Help

(None) [1]
Abbott, Charle HEMO [818]
Abbott, Donna GAST 2035 [669]
Abbott, Jodi OBGY X74509 PG3175 [913]
Abel, Evan ENDO X2151  PG1412 [549]
Abramson, Doug SURG [490]
Abramson, Eliz ADM X2097 [502]
Abramson, Jack PSYC 5735/#1947 [90]
Abu-Jawdeh, Gr PATH X3807 PG1644 [632]
Ackerman, Barb SURG [465]
Ackerman, Stev INF  X4355-X4251 MA [517]
Adams, Cindy CATH X72101 PG1769 [829]
Adams, Nancy MED 889-4593 [7]
Adamson, Stace REHA [1346]
Aepfelbacher,  MED [1084]
Ajl, Leslie NURS [406]
Akerkar, Geeta MED [722]
Akhouri, Vimal ANES X73112 PG38116 [952]
```

If the person entering requests on OCLC were to have a copy of this list nearby, then the spelling and occasional typos that occur might be reduced. Even better, after the last name, first name are entered, you could also enter the patron number in [brackets], which will be picked up in the OCLC Import program and used instead of the laborious Last, First, Dept. troika to find the correct record automatically.

PERHAPS THE IDEAL SOLUTION: It's a bit dangerous but you could also use the **QDPPats.txt** file itself, having it open but minimized while entering OCLC Borrow Requests. Then, when it comes time to enter the **Patron ID field**, just scroll down the QDPPats.txt list and cut and paste in that entire line (which will have everything in it that usually appears on a DOCLINE request, the [Patron Number] included) into the Patron ID field.

With Notepad open, you could use the Edit, Find menu to get right to the Patron's last name, or just scroll down quickly, since they'll be in alphabetical order.

MAJOR CAVEAT: If you choose this route, you must **be sure to close that open QDPPats.txt file before opening either QDPortal or QuickDOC**! If you don't you'll surely get an error when either QDPortal or QuickDOC needs to read or write from it. Use it when you're online entering Borrow requests in OCLC but then close it when you're finished (or else just make a copy of this file regularly, to the Desktop or some other folder that you can easily find when doing OCLC Borrows on that machine).

If you decide to do this, your imports should speed through the Patron check. Create a shortcut on your desktop that leads to (preferably the copied version of QDPPats.txt or, if you're using the version that is kept in the QDPortal Program folder) **C:\Program Files\QDPortal\QDPPats.txt** and then click it just before doing OCLC Borrows online. It can be minimized in the Taskbar when not needed, and then restored when needed to enter the Patron ID info. Just be sure to close that file before using either QuickDOC or QDPortal.

Added Note: For those folks with programs **NOT loaded on a C: drive**, this method probably presents too much danger.   But you might set up a system where you work with the copy: copying the central QDPPats.txt file to some easily accessed location, and then running your shortcut from there. There's actually an advantage to this method, since you can have that QDPPats.txt file open as long as you want to (although it won't show any new changes, so you'd have to re-copy it from its proper place regularly).

Patron Dept (None)

This usually results from a mismatch between the Dept entered in OCLC and the Dept Abbreviation used in QuickDOC. These can be avoided if we attend to data entry on DOCLINE. The **(None)** Department will occur, of course, in **a new Patron record**, so these must be edited to assign correct Departments, Charge Profiles, etc.

OCLC New Patron Report

This report differs from that reported in DOCLINE imports in that it's much more concise. Since you'll know that Patrons were created during the import (you clicked the **Accept Patron** button to add them!) we can get by with a one-line list, in the file **NewOCPat.txt**, which will be in the QDBorrow folder just beneath wherever the database is located.

This report has the following format:

listing Request Number, Name as reported in the report (usually CAPS), Dept in Report, Name as added to tblPatrons in QuickDOC.MDB, and Patron Number in that database.

Borrow Journal Title Not Found (in CAPS)

This situation also exists in Borrow; use the same strategies here as were used in Lend.

Borrow Journal No Title (None)

This must occasionally happen even at the most conscientious data entry levels. Here's what we see in a recent OCLC Borrow Import:

Clearly, these need to be edited.

Borrow Journal Number of Pages Check

If you're reporting to CCC or otherwise tracking the number of pages in Borrow, be sure to enter them in a readable form, so that QuickDOC can properly parse them in the import process. Here's an example of a citation that allows proper parsing in QuickDOC:

OC16623497	Minton	▾	CONO	NEONBU	▾	$0.00	1996	J Gerontol B Psycho	Jour	Copy	2/1/2006
BorrBibRQNO	BorrBibCitatio		BorrBibNoPages	BorrBibArticle			BorrBibAuthor			BorrBibCopyright	
▸ OC16623497	51(5):P279-89		11	A co-twin--control s		Lichtenstein P, ET	L				

Here are some that won't parse, and which you might want to edit manually during the Import Review:

1. Disassociated pages:

OC17540579	McGuinn	▾	CONK	NEUAPS	▾	$0.00	2002	Los Angeles times	Jour	Copy
BorrBibRQNO	BorrBibCitatio		BorrBibNoPages	BorrBibArticle			BorrBibAuthor		BorrBibC	
▸ OC17540579	():S1, S6		1	Giving birth their wa			G			

2. End of Article cites:

OC17190808	Jackson-h	▾	(None)	NYUCCI	▾	$12.00	2000	Obesity, fitness, well	Jour
BorrBibRQNO	BorrBibCitatio		BorrBibNoPages	BorrBibArticle			BorrBibAuthor		Bc
▸ OC17190808	(812):11-EOA		1	Racial differences					L

3. Anything with words instead of the typical nnn-nnn format:

OC17244867	Fernande	▾	(None)	NEUAPS	▾	$0.00	2006	Curr genetics	Jour	Copy	2/15/2006	2/20
BorrBibRQNO	BorrBibCitation			BorrBibNoPages	BorrBibArticle		BorrBibAuthor					
▸ OC17244867	EPUB AHEAD OF PRINT():1/13/2006			1	Control of mapk sig		Schwartz MA, Madl					

or

OC16686766	Mathews	▾	CONO	NEONBU	▾	$0.00	2003	J Women Aging	Jour
BorrBibRQNO	BorrBibCitatio		BorrBibNoPages	BorrBibArticle			BorrBibAuthor		Bc
▸ OC16686766	15(2):7/28/200		1	Increased hospitali		Laditka J; Laditka S	G		

Clearly, these should be avoided, if at all possible.

OCLC Borrow Import Totals

At the end of each import session, you'll see a Message Box with the session totals, along with the **First Date** and **Last Date** of the items imported. Note these values to set up your **review** of the import.

Review OCLC Import Process

Both Lend and Borrow Imports should be checked directly after importing. Open the appropriate Grid, get to the backfile, and set the dates to match the dates of the import. Search those dates for requests beginning with OC and you'll have your import file. The editing work begins from there.

You can also use the OCLC Import Report (By OCLC Symbol) to check loans **sorted by OCLC Symbol**.

Export Files

The **Export** choice is found on the **File Menu**. It will not be enabled unless you have populated the Grid with a number of records. The records contained in the set meeting your search criteria will be the set exported.

Fill Grid with Items to be Exported

Searching the required date range using the **Status value Equals All Acted Upon** retrieves **all requests** that were processed during that period and, consequently, is the most inclusive set. Use this with the **Search All Lend Items Grid**, for example, to get all Lend records for Export.

Once the Grid is populated, click the **File Menu**, **Export** and **Lend Items**, as shown above to effect the Export. The export process will transfer only those items you've chosen to a text file named after the database table, in this case **Loaned.txt**, or **Borrowed.txt**, for Borrows, always located in a folder called \Export just beneath your database location.

Just to be safe, it will also export to text files your current Libraries, Library Groups and, for Borrowed Items, the Patrons and Dept Tables. Three **comma-delimited text files** (Loaned.txt, **Libs.txt**, and **LibGrps.txt**)are created for Loaned items; five comma-delimited files (Borrowed.txt, Libs.txt, LibGrps.txt, **Patrons.txt**, and **Depts.txt**) are created for Borrows.

 When the export is complete (it doesn't take very long) you'll get a message to that effect, something like:
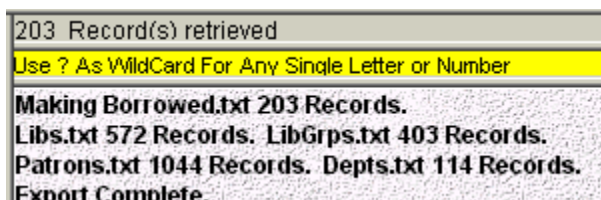
You'll find the files in the \Export folder, located centrally just beneath your QuickDOC.MDB database location, ready to be imported into an Access 97 database, a version of Excel, or most any other database application that can accept input from external files.

Export Selected Records

You can export a **subset** of whatever records are in the Grid by Selecting that subset (either by holding down the **Ctrl key** and clicking the **Record Selector** of each record to be included, one by one, or by selecting the top record and then holding down the **Shift key** and clicking the last record in that group, if it's a **group of contiguous records**. If there are **records selected**, only these will be exported.

Selected records appear in blue.

Export Filenames

Depending upon the Grid you are exporting from, the following filenames will appear in the **Export Folder beneath the QuickDOC.MDB Database location**:

Grid	Export FileNames	Description
Lend Item Backfile	**Loaned.txt**	Individual items
	Libs.txt	Libraries
	LibGrps.txt	Library Groups
Library Billing	**LibBills.txt**	Individual items
	Libs.txt	Libraries
	LibGrps.txt	Library Groups
Borrow Item Backfile	**Borrowed.txt**	Individual items
	Libs.txt	Libraries
	LibGrps.txt	Library Groups
	Patrons.txt	Patrons

	Depts.txt	Departments
Local Billing	**LBilling.txt**	Individual items on Local Billing Grid
	Libs.txt	Libraries
	LibGrps.txt	Library Groups
	Patrons.txt	Patrons
	Depts.txt	Departments

Local Billing column headers exported won't include the full Field Name (e.g., BorrLocalRQNO) but will strip out the prefix and include just the descriptive part (e.g., RQNO).

How To Import Exported Data Files

Steps to **import previously exported files** are as follows (using an **Access database import example** here, but the steps will be similar with any other database or spreadsheet format):

1. Start up Access and choose a Blank Access Database (the first time; once you've got the Access 97 database created, you can import subsequent exports into the same database). Create this database in whatever folder you wish.

2. Choose Menu choice **File**, then **Get External Data**, then **Import**.

3. Navigate to your \Export folder and choose Files of **Type "Text Files"** to see the new exported file list.

4. Select "LendItem.txt" and click **Import** to generate the Import Text Wizard.
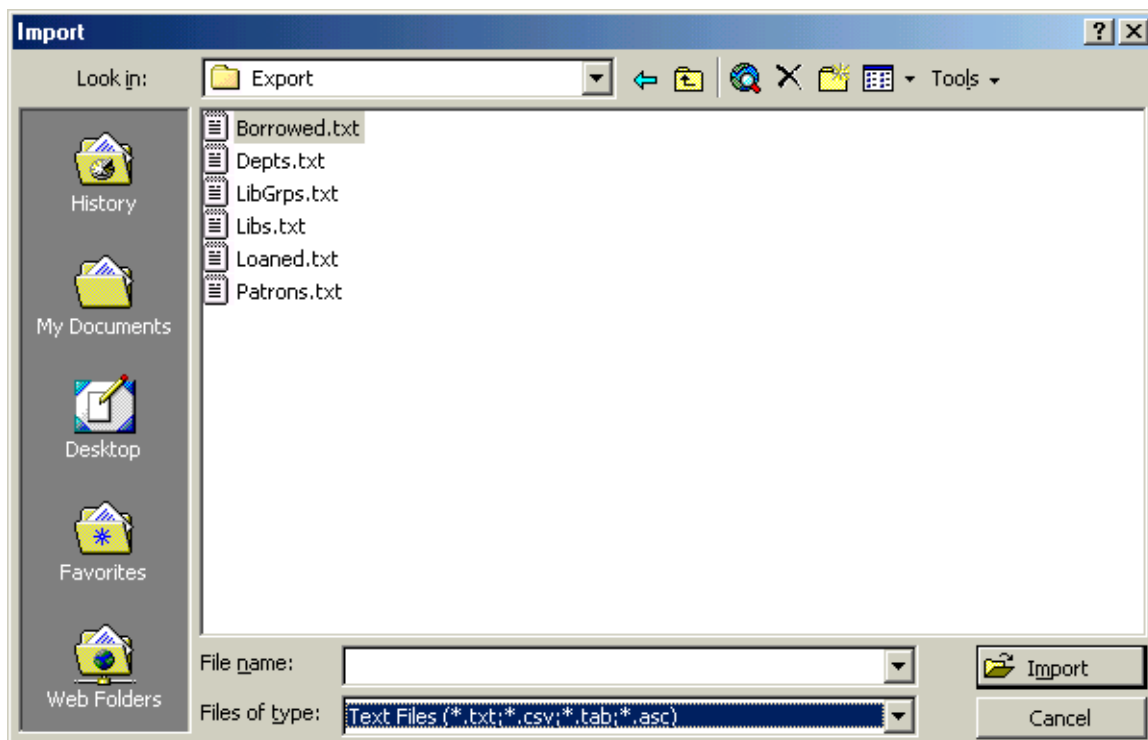
Import Text Wizard Screens

1. **Delimited** should be checked, click **Next** to move to the next screen.

2. **Delimited 'comma'** should be checked; **Text Qualifier = Double Quote**; also check "**First Row contains Field Names**" box; then either click the Advanced Button or otherwise edit fields as follows (this example is for Loaned.txt and LibBills.txt, but Borrowed will be similar, with "Borrow" preceding the field name---LBilling.txt has the "BorrLocal" preceding the field name stripped out, and will look much like those cited below):

RQNO	- Change "Indexed" to "**Yes (No Duplicates)"**
CHRG	- Change "Data Type" to **Currency** (if a currency type is available)
EFTS	- Change "Data Type" to **Yes/No**
DTRE	- Change "Data Type" to **Date/Time**
DTFL	- Change "Data Type" to **Date/Time**
DTPD	- Change "Data Type" to **Date/Time**
MaxCost	- Change "Data Type" to **Currency**
RushRequest	- Change "Data Type" to **Yes/No**

Click **OK**, then click **Next**

3. Choose to store data "**in a new Table**" for the first import, or choose the matching table for subsequent imports.

4. Configure Fields, if they haven't already been configured with the Advanced Button above; otherwise, click **Next**.

5. "**Choose my own Primary Key**," which should be the **RQNO** field in all cases, then **Next**.

6. Finish.

Repeat for Libs.txt, LibGrps.txt, etc. The **import wizards** generally guess fairly well at the **Data Types needed for the new import database**, with the exception of types listed above. You can accept the text data type for most fields, but make sure any Date/Time, Currency or Boolean fields are set up properly. **Primary keys** for each of these Tables are:

Libs	-	**LibID**	(LibUseISO and LibEFTS are Yes/No)
Patrons	-	**PatronID**	(PatronActive is Yes/No)
Depts	-	**DeptAbbr**	(All text except for PrefPmt and AddrID)
LibsGrps	-	**Both fields**	(All Text)

Importing To Excel

Importing records into Excel-type spreadsheets works in similar fashion to the Access example, above, except that you are importing each table into an Excel worksheet. You may be able to get by with importing just the Loaned.txt and Borrowed.txt files, if you just need basic information. Or you can also import other .txt files into separate sheets, and then link them by Primary Key values. The LibGrps.txt file export looks like this:

[The first row is a list of the field names.]

"GroupLibrary","GroupName"

[All the other rows contain the data for those fields, one per record]

"MAUNEP","MA"

"MAUNHM","R8"

"MAUNLF","MA"

"MAUNLF","BBLFAX"

etc.

The GroupLibrary field matches the BORR field in the LendItems Table (and LibID field in tblLibs, or BorrowLibr in tblBorrowItems), so that you can create some kind of Lookup relationship between the two sheets that will reference the related data in the LibGroups worksheet to the LendItems worksheet (although this case is a bit more complicated, because each Library can belong to any number of Groups). Rather than trying to match the exact Library to exact LendItems, BTW, export always dumps out the entire Libs Table (it exports ONLY the LendItems or Borrow Items you select), just to make sure that the Library record is always available, should you need it. The same is true for Patrons.txt, Depts.txt and LibGrps.txt.

Sorting the Excel File

Typically the imported set of records comes in sorted by whatever sorting was used when the data was retrieved from the database (even if you changed the sort order in the QuickDOC Grid). Once the data is in Excel, though, you can assign a new sort order, based on one of the columns, as follows:

1. Click into any cell in the column you wish to sort by;
2. Click the Sort Ascending (or Sort Descending) button, which is under the tools menu if not currently displayed on your tool bar.
3. Export or print the file, as desired.
4. Click into another column to prepare a different view of the same data.

Uninstalling QuickDOC

Uninstall QuickDOC

If you ever need to **uninstall QuickDOC**, 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 (it won't delete any database files, though, just in case).

QuickDOC Database

QuickDOC Database Location

1. In general, **if you think that more than one computer will be using the files, it's best to locate the data files on a network drive**. Make sure that all potential users have all rights, including Create, Delete and Modify Files, Folders and subdirectories in the folder you choose.

2. If **only this machine will be running QuickDOC**, the database will be located, by default, in same folder where the QuickDOC.exe file is located. You can always change the location later using the **Locate QuickDOC DB choice under Setup** on the QuickDOC Menu Bar.
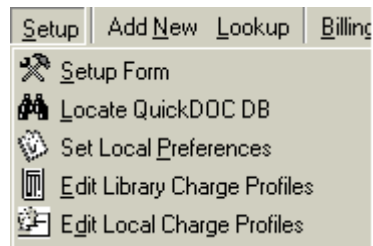
3. The Locate QuickDOC DB choice leads to the **QuickDOC.MDB Database Operations Form**, which is used to move the QuickDOC.MDB database, as well as to identify the location on first installation (see below).

In general, locating the database on a server seems to have the most advantages.

Current QuickDOC Database Location

The **current database location** of the database will be available in two places:

On the Status Bar

The QuickDOC **Database Location** is always visible in the **Status Bar** that appears at the bottom of the screen.
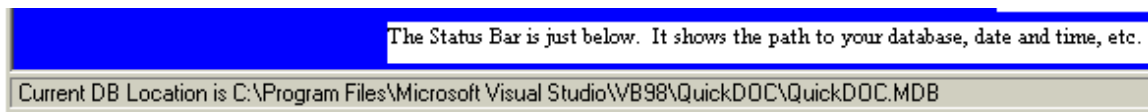
If you can't see the Status Bar at the bottom of the screen, it's probably hidden behind the Windows **Task Bar**. If you'd like to have both the Windows Task Bar and the QuickDOC Status Bar visible, you can make the Status Bar visible by re-sizing the QuickDOC Main Screen. First diminish the Windows Task Bar temporarily by dragging it down to the bottoe on the screen. Move the MousePointer to the top of the Windows Task Bar, until it turns into an Up and Down Arrow:
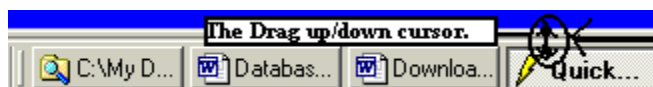
Then drag that top line down to the bottom of the screen until the Task Bar disappears, to expose the Status Bar of QuickDOC. Use the lower right corner of the QuickDOC screen to drag it up just enough to permit the Task Bar to take up the space beneath:

Once the bottom of the QuickDOC Status Bar has been raised enough to match the bottom space that the Windows Task Bar usually takes, stop dragging the bottom of the QuickDOC form. Move the MousePointer to the very bottom of the screen, until it turns into that familiar Up and Down Arrow, and then move it up to the bottom of the new QuickDOC form and let go. Repeat until both the Status Bar and Windows Task Bar are visible onscreen. Once this is set, it should become the default for future sessions.

On the Locate QuickDOC DB Form

It's also available in the yellow box at the middle of the Locate QuickDOC DB form as the current location, in case the Status Bar isn't available. Click **Setup** on the Menu Bar, then Locate QuickDOC DB:
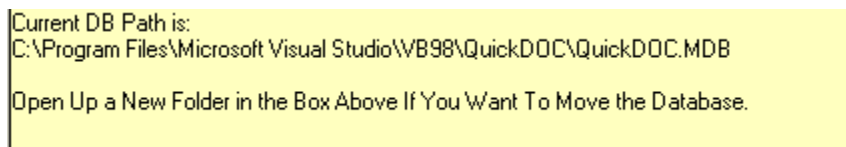
Just click Exit when you're finished.

Click Status Bar to refresh Database Location

If you suspect that your QuickDOC.MDB database is not pointed to the correct location, click once on the Status Bar at the borrom of the blue screen to refresh. In cases where you've redirected the database back to a network drive, the **new database location may not show in the Status Bar** until you have exited the program and come back in. You can avoid this unnecessary exit and restart by clicking the Status Bar panel with the database information to force a refresh. You can also use this method to check that you're pointing to the database you think you're pointing to.

If you've just redirected the database pointer to a network drive (E: in the case below), this will refresh the Status Bar so that it reflects your **current network database location** rather than the fallback **C:\Program Files\QuickDOC\QuickDOC.MDB** value that is the **default database location** for non-network installations.
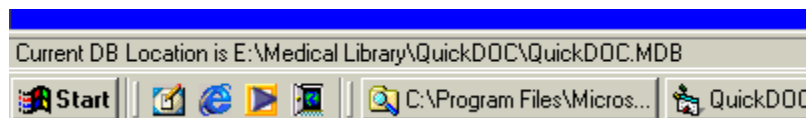
After clicking the Status Bar database panel, the new network location will be displayed, as above.

QuickDOC Database Troubleshooting

Database Drive not available on Startup

If your QuickDOC.MDB database is located on a server and that server is not available when the program is started, QuickDOC will temporarily use a location on the C: drive (in the Program folder, usually at C:\Program Files\QuickDOC). This change is sometimes quite subtle, though, and users are not always aware that the database location has moved.

While the database location is always available in the Status Bar (see above), it's easy to miss the change. Since the lack of access to the database drive is often first noticed on startup, QuickDOC includes a check during startup to ensure that the drive on which the database is located is available at that time. The program will display a **Drive Not Available** Message Box with an option to exit the startup process if it is not.
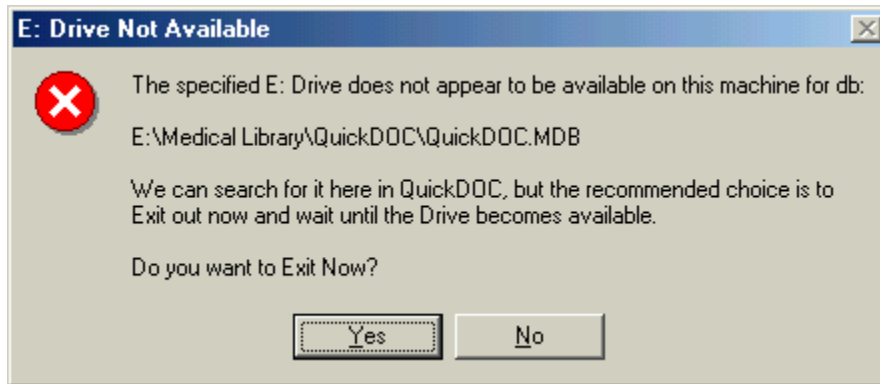
If you continue beyond this message, you can expect to be relocated to the default C:\Program Files\QuickDOC location for the database. The best choice is always to answer Yes to the "**Exit Now?**" question, and to reboot or otherwise log onto the network again to see if the drive becomes available then.

Because it's also possible that the network drive may become unavailable at other times during the session, it will still be necessary to glance at the Status Bar from time to time, just to be sure you're pointed in the right direction. If you notice that you suddenly have far **fewer records than you thought** you had, or that the records you see are **all older records**, the first thing to check is the Status Bar.

You can always move the pointer back to the network location by using the **Locate QuickDOC DB** choice under **Setup** on the **Menu Bar**. This process will also move over any unique items that might have been saved to the temporary C: location in the interim.

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:

Is This the Correct QuickDOC.MDB database for MAUBET?

⚠ ATTENTION! This database at location:
  C:\Program Files\Microsoft Visual Studio\VB98\QuickDOC\QuickDOC.MDB
is currently assigned to Beth Israel Deaconess Medical Center
with LIBID: WRONG!

If the LIBID for Beth Israel Deaconess Medical Center
Should be MAUBET then click Yes below.
Click No to log in as WRONG or click Cancel to Exit.

Choices for Beth Israel Deaconess Medical Center are:

  Yes - Log me in as my real LIBID: MAUBET (and also fix the incorrect DB value: WRONG)
  No - Log me in as WRONG (I'll go on as I was; forget that MAUBET LIBID!)
  Cancel - No changes made. Exit. (Get me out of here!)

[Yes]   [No]   [Cancel]

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.

Database Moved From This Location

You should always use the **Locate QuickDOC DB** method under **Setup** on the **Menu Bar** to change the location of your QuickDOC.MDB database. Besides insuring that all unique records are moved from the old location to the new location, this process will also.refresh locations maintained in the **MyLibraries.txt** file and in the **Registry** entries for the current user. Once the database is moved, QuickDOC also makes two changes in the folder of the original location:

1. It changes the value in the top row of the **aaaVer** table of that old version to **MOVED**.

2. It places a file called **QDMoved** in that folder with the following information:

    1. The **version number** of the database that was moved (in the first line of the file, format: "This DB Version=2.1.7"); and

    2. The **new location** of the database (in the second line, format: "New Location=S:\Medical Library\QuickDOC.MDB").

If, after one machine has used the Locate QuickDOC DB method to relocate the database, a second machine starts up QuickDOC, that second user will see the following **Database Moved From This Location** message:

Database Moved From This Location

Your Central Database Location appears to have moved to:
C:\PROGRAM FILES\MICROSOFT VISUAL STUDIO\VB98\QUICKDOC\Graphics Used\QuickDOC.MDB
This new Location is now registered for this machine.

Click Ok to Exit all the way out of QuickDOC,
Then come right back in to begin with the new location.

OK
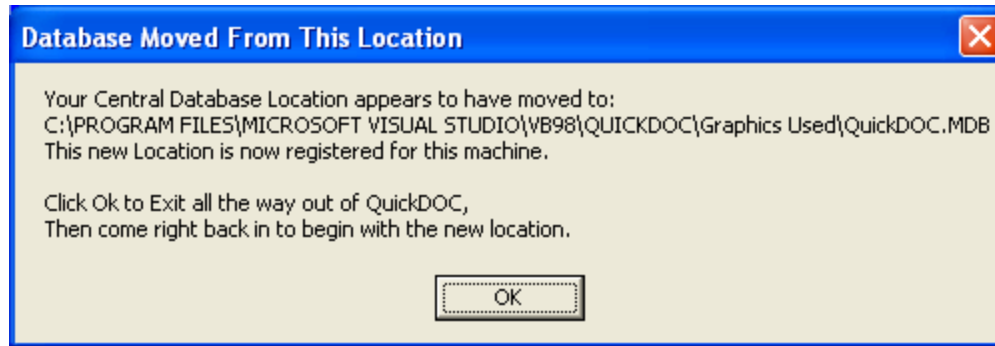
Clicking Ok will refresh the values in **MyLibraries.txt** and in the **Database Location entry** in the Registry of the second user, after which the program will terminate. On restarting QuickDOC, the user will be brought directly to the new location, with no other notification needed.

Preventing Loops. Since it would possible under these restrictions to change a database location from one place to another and then back to the first location, with the result that the QDMoved files would point back and forth to each other, QuickDOC checks for a QDMoved file in each new location. If it finds one that points back to the location it's coming from, it resets the aaaVer table in that original location from MOVED back to the true database version (as stored in QDMoved) and deletes that QDMoved file in the original location. This still results in a message box like the above on the next startup, but the process stops there, as the original location no longer re-directs the user on the next startup. The buck stops at the first location.

While it's likely that both databases in the case above will be identical, it won't hurt to run File, Import, **External QuickDOC Data** on that second database, just to be sure it doesn't contain any unique items.

MOVED QuickDOC.MDB Databases

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. Another user has moved the database to a folder called Export since the last time you logged on.

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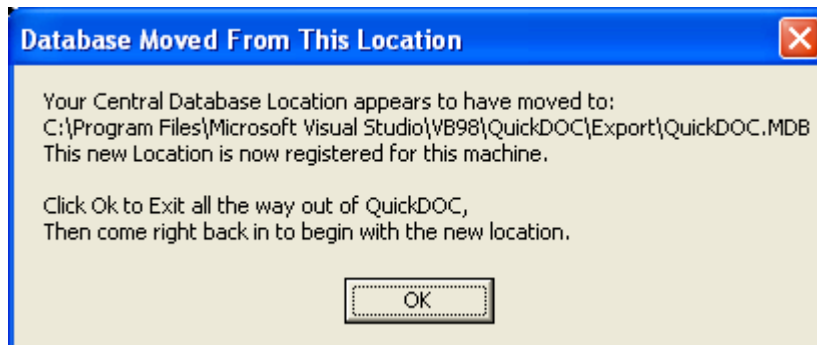
Click Ok and QuickDOC will reset all your internal pointers to the new location and will exit the
program. Start QuickDOC right up again and it will proceed with the login to the QuickDOC.MDB
database that is located at the new location.

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

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. 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.

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.
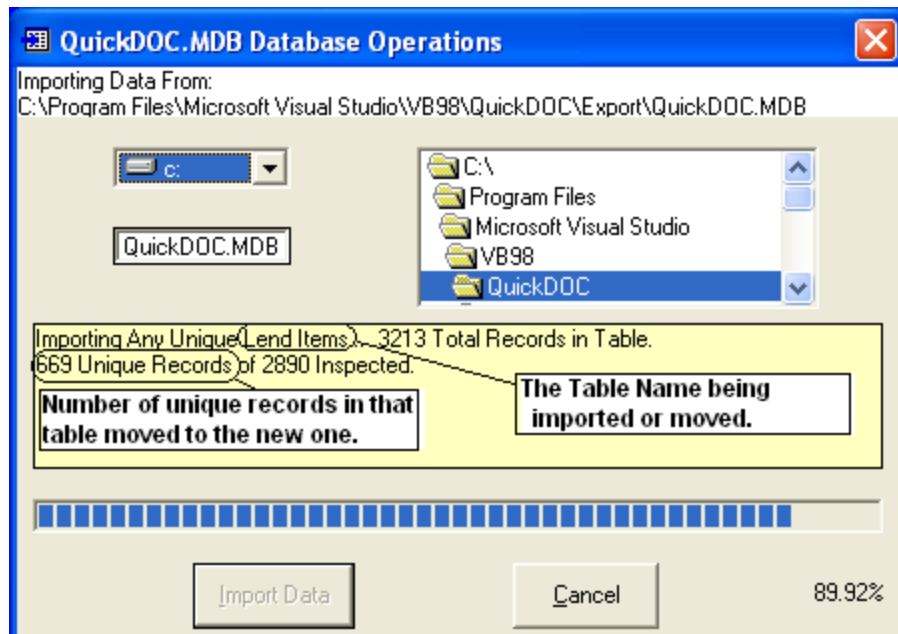
The yellow box shows you the progress of each table (we're moving tblLendItems in the example above) as any unique records are moved from the old database to the new. Once this process is finished, you can continue to work, since all pointers now point to the new database and there are no update operations 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:
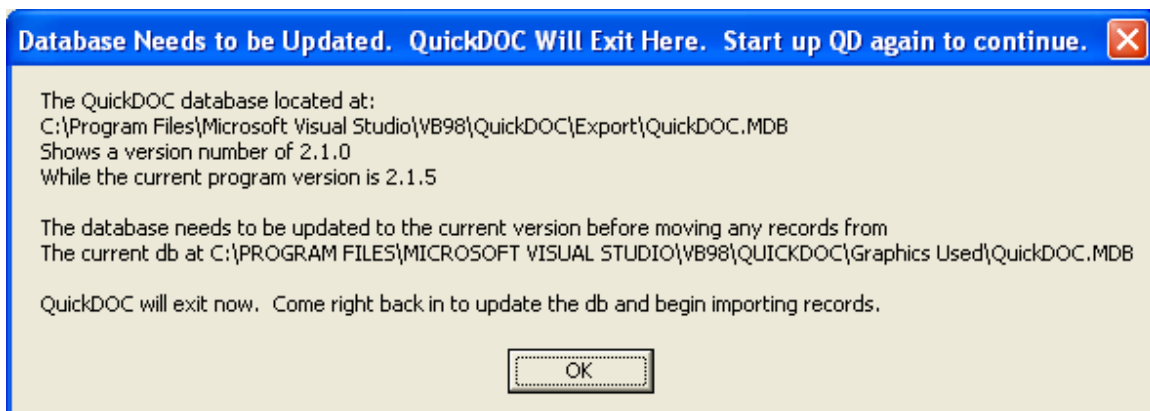
In this case, QuickDOC will set a few pointers and will then exit. (If, for any reason, the program doesn't fully exit, just exit all the way out yourself before continuing.) Start right up again and

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::

An Earlier Database Was Moved From This Location!

The QuickDOC.MDB Database at this Location was once moved to:
C:\PROGRAM FILES\MICROSOFT VISUAL STUDIO\VB98\QUICKDOC\QuickDOC.MDB
If this location is unfamiliar to you,
You may want to use File, Import, External QuickDOC DB from the QD Menu Bar
to import any unique items stored at that database location when we're finished here.

OK
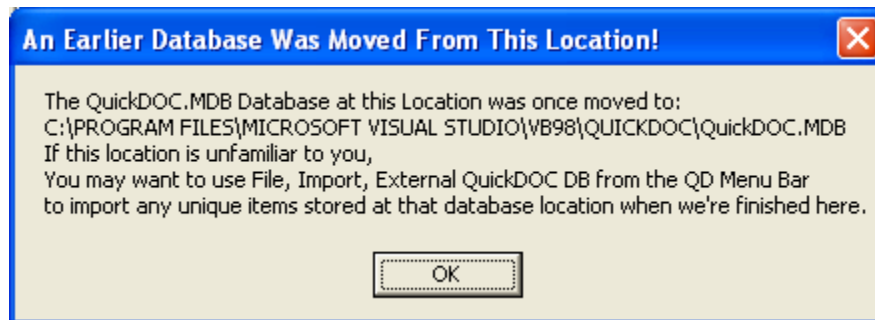
Rather than try to follow a path that may have been long since abandoned, QuickDOC will set its pointers to this location and assume that you will use the File, Import, External QuickDOC DB choice on the Menu Bar if you feel there may be some unique items in the database referred to above. If this database 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:

Database Has Been Imported

Records from this Database have already been MOVED into the new DB.
You can check it again, but most likely these records are already in there.

Check Again Anyway?

Yes   No
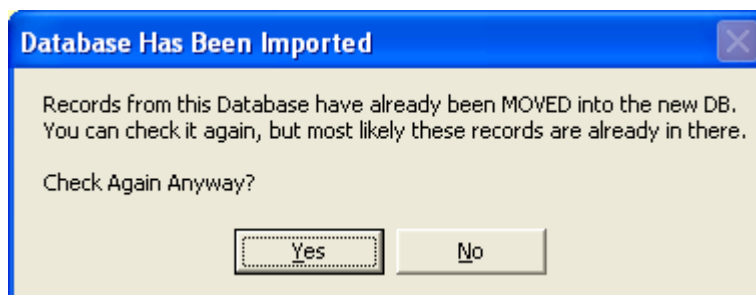
In most cases you can click No, since the first user who moved the database has probably also moved over the unique items, but if you're unsure you can always run through the process again by clicking Yes.

Problem Opening Version Table

When you see **Problem Opening Version Table** as QuickDOC starts up, in most cases it means that the database isn't being found where the program thinks it should be (it can also occur if someone has locked down the database for some maintenance operation, but this will rarely be the case, and if it happens just after downloading an update, then it's probably a location problem).

Each machine running QuickDOC keeps track of where the database is located by checking the entry in MyLibraries.txt or in the Registry entry. If it doesn't find the db there, it next looks in the program folder (typically, C:\Program Files\QuickDOC) to see if it's there.

If it finds one there, it will go ahead and use that one, but if not, you'll get that Problem Opening Version Table error. In general, this could occur if the database was moved outside of QuickDOC (rather than with the "Locate QuickDOC DB" form) and consequently the Registry entry no longer pointed to the correct location.

Try this as a way to recover. First, use Windows Explorer (or NT Explorer) to check whether the QuickDOC.MDB database file is in the folder you expect it to be in (the recommendation is either the QuickDOC Program folder, if you're using only one machine or some file server location if you're using more than one). If it is, and if the size of the file is greater than 4660K or so and it was recently accessed, then it's probably the one.

If you want to look and see where the **Database Registry Entry** thinks the db is, do this:

1. Click the Start Button, then "Run."

2. Type: **regedit** in the run box and click OK.

3. When the **Registry Editor** comes up, click the + sign next to the following:

   HKEY_CURRENT_USER, then

   Software, then

   VB and VBA Programs, then

   QuickDOC

4. Under QuickDOC, you'll see a **Database Key** folder; click once and its values will show up in the right pane. The path next to "**Location**" is where the program THINKS the db is.

5. Make a note of this path and close the Registry Editor (**DON'T** try to make any changes with the Editor!) either by clicking the x on the upper right or clicking "Registry," then Exit.

Next look in your Program folder (C:\Program Files\QuickDOC is the default) to see if there's a default QuickDOC.MDB file in there. If there isn't, you can rename the QDUpd.MDB file to QuickDOC.MDB and try to start up again. If this works, then skip to **Locate the DB Again**, below.

If there's already a QuickDOC.MDB in the Program folder and you're still getting the error, then your best bet will be to delete the Database key so that QuickDOC sets up the location anew. Follow all steps in the list two paragraphs above until number 4. In number 4, where you first see the Database folder under the QuickDOC key, right-click on the folder icon and choose **Delete this Key**. Once the key is deleted, choose Registry from the menu bar, then Exit.

When next you start up QuickDOC, it should announce that you'll need to identify the Database location, etc. If you're not brought directly to the "Database Operations" window, then use the Setup Menu to **Locate QuickDOC DB** in its proper place.

Database Version is Different

When performing an installation on a new machine with an updated version that is **greater than the current Database Version**, and if, for whatever reason, you don't get a chance to point to the correct database at the time of installation, you'll get a message box with the following warning when you try to move it to the desired location:

Database Version is Different

This Database is of a different version from your current Database version. It's set for DB Version 2.0.0 rather than the current 2.0.1.
While you can bring an older version's records into the current database version,
You don't want to go the other way!

Roundabout Solution:
1. Import the old 2.0.0 Data into the current DB, using:
   File Menu - Import - External QuickDOC Data (from) d:\Apps\QuickDOC.MDB
2. Delete the old d:\Apps\QuickDOC.MDB
3. Do the move again, with no DB now to be replaced.

[OK]

If this occurs, follow the instructions above, which will, in effect, first move the data from the database with the earlier version notation to the current (generally minimal) installation database, and then clear a space on the server where you can move it (newly updated) back to where it was.

Steps are:

1. Use the File Menu, Import choice to choose External QuickDOC Data, and click on the folder with the old version database.

2. When you've found it, click **Import Now**. This moves the old data to the new database format.

3. Use Windows Explorer to delete (or rename, just to be safe) the old QuickDOC.MDB.

5. Use the Setup Menu, Locate QuickDOC DB, to move the database location once again to the desired central location. Since there won't now be a file to update, this operation will be very quick and the database should now show in the Status Bar in the new location.

This situation can be prevented by using this strategy: **First update all computers currently running QuickDOC before installing any newer version on a new computer**.

Subscript out of range error in grid

This error sometimes appears when trying to open either a Borrow or Lend Grid. It often appears with messages something like the following:

Error Number: 9

Description: Subscript out of range

Source: QuickDOC

Try Again

And may be followed by another error:

Error in LendItem List (or BorrowItem List)

Error Number: 6147

Description: **Column Not Found** Type (or some other column)

There are generally three steps to try in dealing with this error:

1. Run the Access **Compact & Repair utility** on the QuickDOC.MDB database. It must be Access 2000 or greater, but you can run it from any machine with rights in the QuickDOC.MDB database folder (not just a machine currently running QuickDOC). If none of your machines uses MS Office 2000 or greater, you can run the JetComp version of this utility (see instructions under JetComp.exe, below).

2. Try **reinstalling QuickDOC**. This sometimes refreshes a support file that might have been corrupted.

3. If neither of the above works, then you might have a corrupted MDAC installation. You may need to **upgrade your MDAC version**. Check instructions under MDAC in the Downloading and Installation chapter, above.

Refresh Database

If, during the course of adding a Borrow or Lend Item record (usually during a QDPortal Import), you encounter a Message Box with a reference to an **Invalid argument** or **rehab QuickDOC.MDB**, it's rather likely that the database table in question has been **corrupted** and we may need to use a fresh database structure and move the data from the corrupted database into the new and uncorrupted database structure. A typical announcement of this kind will appear as follows:
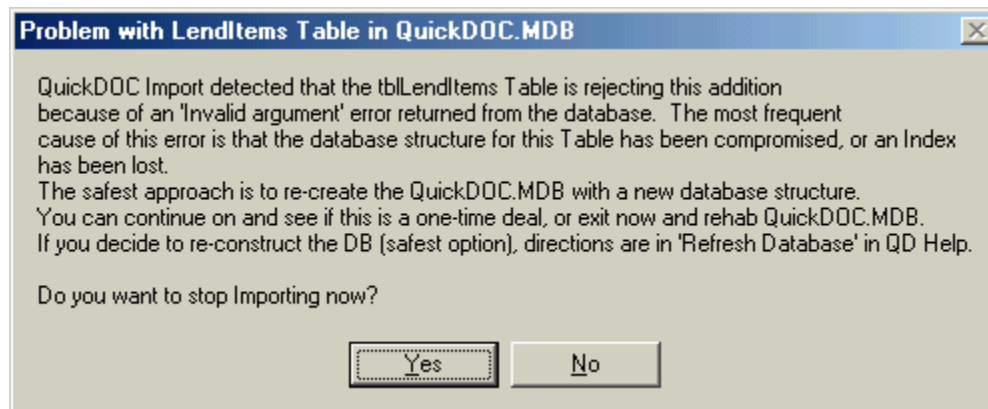
You can try one or two more times, to see if it's a one-record glitch, but if this message persists you have three choices (MS Access Database Repair usually won't work on this problem):

1. Try running the **JetComp**.exe utility (see **Compact & Repair Database**, below). JetComp sometimes works where the Access 2000 Database Repair utility doesn't.

2. Try using your latest backup version of QuickDOC.MDB (but this may just replicate the problem.

3. Begin with a fresh, new database structure and re-import just the data from the old database.

The latter of these may take a bit of time with a large database, and is probably best set to run overnight, so that the new database will be ready in the morning (this is recommended for databases with more than 10,000 items in both Lend and Borrow), but the result will be a fresh database structure with all the current data restored.

Steps are:

1. **Make sure all users are logged out of the QuickDOC and that no one will be logging in to the database during this procedure**.

2. Use Windows Explorer to move the (current, corrupted) QuickDOC.MDB database to another location (somewhere you can easily find it again, for importing purposes). This will mean that there will now be no QuickDOC.MDB where the program expects to find it.

3. Start up QuickDOC on your fastest machine ; you'll get the error message that the database can't be found.

Problem Opening QuickDOC.MDB

Unable to Open the QuickDOC.MDB database because of the following error:
Could not find file 'C:\Program Files\Microsoft Visual Studio\VB98\QuickDOC\QuickDOC.MDB'.

If this is just a problem with the db location, we can re-establish the connection.
If this is a problem which causes the db to be unavailable, the it's best to exit and try again later.

Stop Loading QuickDOC?

[Yes] [No]
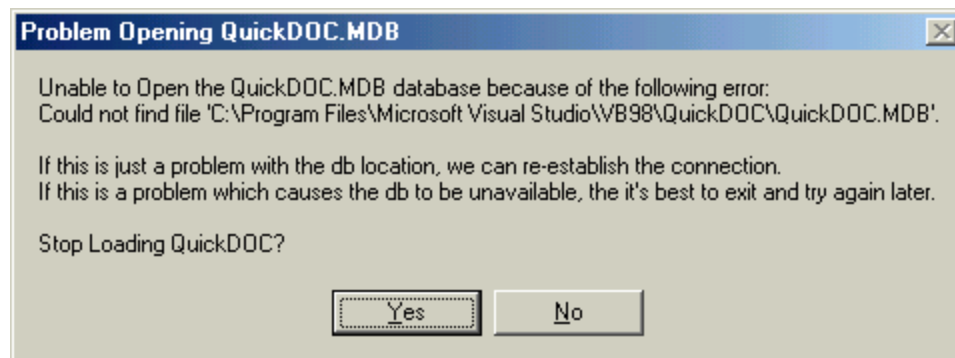
4. Click [No] so that the program continues to load. This will cause it to prepare the default database (with the uncorrupted structure) for use as the main QuickDOC.MDB. You'll see the message announcing that we're ready to create the new database:

Setting Up the QuickDOC.MDB Database

Ready to set up the QuickDOC.MDB Database for This Machine.

If you have already set up a location for the QuickDOC Database on a server, you can search for it now. Or if this is the first installation, you can choose where the QuickDOC Database is to be located. If more than one machine will be using it it makes sense to locate it on a machine that is accessible to all workstations.

The Default, if you are using just this one machine, is in the QuickDOC Program Folder:
C:\PROGRAM FILES\MICROSOFT VISUAL STUDIO\VB98\QUICKDOC

Hit Any Key To Continue.

[OK]

5. Click Ok and then use the QuickDOC.MDB Database Operations form to locate the database in the same folder where you have just recently removed the corrupted QuickDOC.MDB.
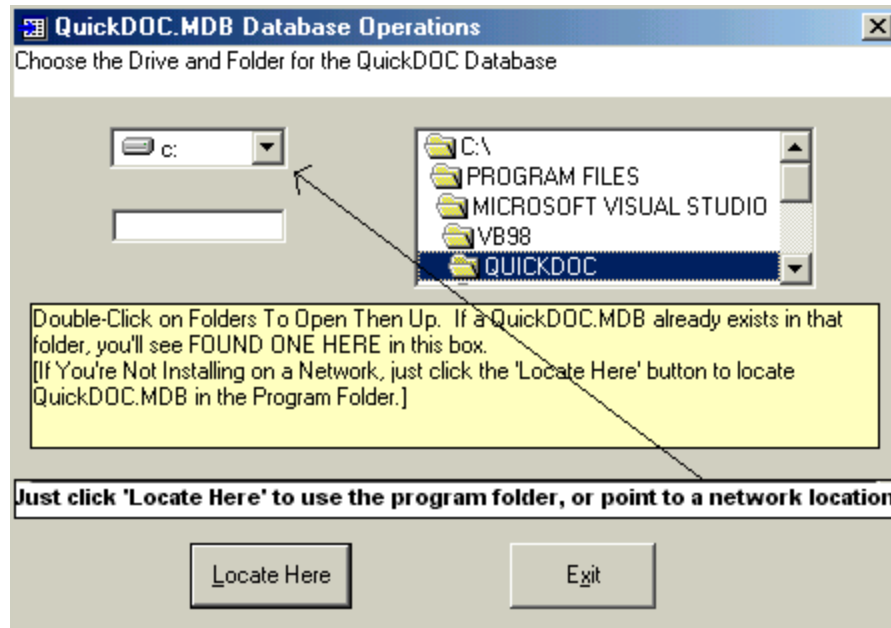
6. When you find the proper folder, click **Locate Here** to place the new database (mostly empty) in that location.

7. You may have to fill in some entries in the Setup Form, but once that's finished, use the **File Menu**, **Import** choice to choose **External QuickDOC Data**, and navigate to the folder with the old (corrupted) database, just moved there in step two, above.

8. When you've found it, click **Import Now**. This moves the data only, from each table, to the new database structure, table-by-table, record-by-record. **Since this is a very intensive use of the database, it's a good idea NOT to do any other database work at the same time**. It can take anywhere from thirty minutes (for a small database, with a few thousand records) to 6-8 hours for a database with tens of thousands. Because this process imports and verifies each record passed from the old database, it will take time to run through.

9. After the import process is complete, either run the **Access 2000 Compact & Repair** function to complete the process, or use the **JetComp.exe** program (found in the QuickDOC Program folder) if you don't have a copy of Access 2000. See Compact & Repair Database, below.

QuickDOC.MDB Needs to be Repaired!

When you see a message box with the heading **Unable to Open QuickDOC.MDB at Data Source** as QuickDOC starts up, or at any other time, it <u>COULD</u> be a missing database, but, more likely, it will be a **corrupted** or otherwise **unreadabl**e database and this database needs to be **repaired**.

If you get this message:
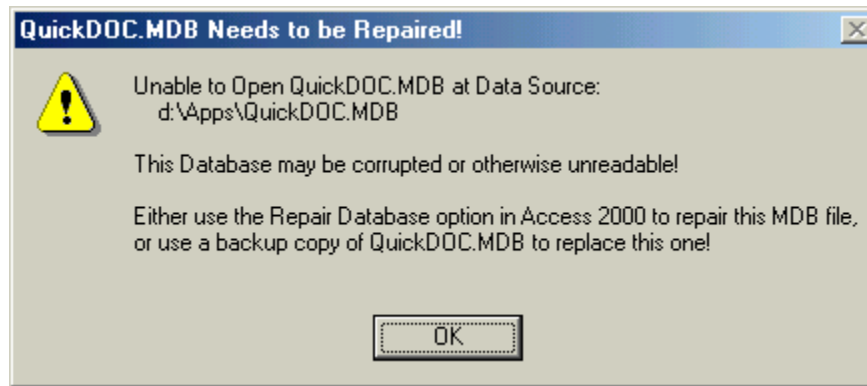
it isn't good news. You can either **Repair** the database or **Restore** the database from an earlier backup. If you have a backup of QuickDOC.MDB that is the same or very close to the same as the current DB, then go ahead and restore that one to replace this one; repair if you can.

Restore QuickDOC.MDB

If you have a backup of QuickDOC.MDB, and haven't added anything yet today to the DB, then absolutely go with the Backup DB!

If you have no backup of QuickDOC.MDB then you will need something else. If you have Access 2000 on this machine (or another nearby) you can use that program to repair the database. Otherwise, we're back to Total Reconstruction of the database (Not something we look forward to).

Repair QuickDOC.MDB Database

Try running the **JetComp**.exe utility (see **Compact & Repair Database**, below). JetComp sometimes works where the Access 2000 Database Repair utility doesn't.

While using the JetComp.exe utility is the better choice in most cases, if you have Access 2000 (or greater), you can also repair the database **from within Access 2000**. First make sure that everyone has logged off of QuickDOC.MDB (while Access 2000 can effect changes to this database, it isn't reliable in a multi-user environment; so have everyone sign off first). Then open the QuickDOC.MDB database by double-clicking on it from Windows (or NT) Explorer:

When you first try to open QuickDOC.MDB (with Access 2000) you'll get the following Error Message:
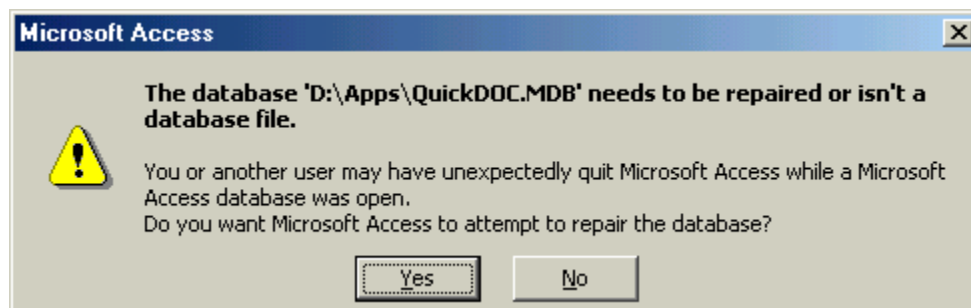
Click **Yes** to attempt the repair. In most cases this will be successful.

Using Access 2000 with the QuickDOC.MDB Database

This is also important for regular QuickDOC.MDB use: if you access the database through QuickDOC, then the database is protected by the ADO-mediated database management, with

record-locking and other database protections involked. Opening the database using Access 2000 doesn't have these protections---it just opens the DB, for whatever changes you have in mind, but without the kind of protections you'll have when using this same database in QuickDOC.

So, please, keep these two things in mind:

1. **If you're opening QuickDOC.MDB in Access 2000, try to insure that no one else is, or will be, logged in.**

2. **When doing updates from one QuickDOC version to another, do one workstation at a time, since some updates will involve database updates, which may be extensive, and having more than one database attachment trying to make these changes at the same time just increases the chance for collisions**.

Compact & Repair Database

JetComp.exe

It's definitely a good idea to run the JetComp.exe program periodically, whether or not your database appears flaky, to compact and refresh the data in QuickDOC.MDB. Jetcomp.exe is a standalone utility that allows you to compact the database from outside the QuickDOC program. **Make sure all users have logged out of the system**.

1. Open Windows Explorer and navigate to the **QuickDOC Database location** (it's always shown with the full path in the Status Bar at the bottom of the Blue Screen).

2. Right-click on the QuickDOC.MDB icon (you may see it a a Key symbol or MDB file) and choose **Rename**. Change the name from **QuickDOC.MDB** to **QDOld.MDB**.
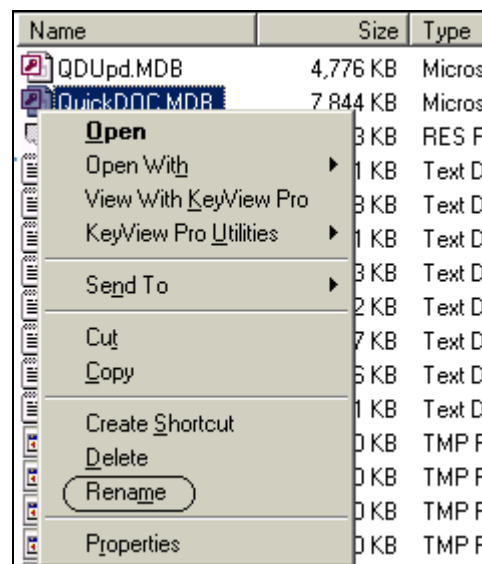
3. Again, using Windows Explorer, navigate back to the QuickDOC Program folder (usually C:\Program Files\QuickDOC).

4. Double-click JetComp.exe

5. In the **Database to Compact From (Source)** box, use the […] button to navigate over the the QDOld.MDB file. This is the database that you want to compact.
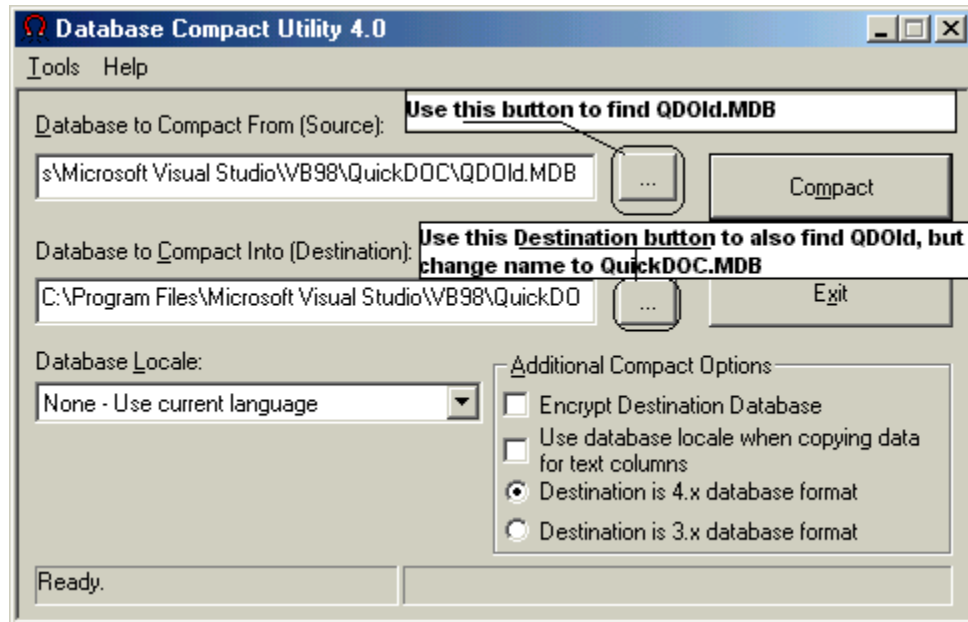
6. In the **Database to Compact Into (Destination)** box, use the […] button to navigate over the the QDOld.MDB file once again. This time, change the QDOld.MDB at the end to QuickDOC.MDB (use the preferred capitalization for consistency).

7. Click **Compact.** You'll see a Progress Bar on the lower right, and the status will return to Ready when it's finished.
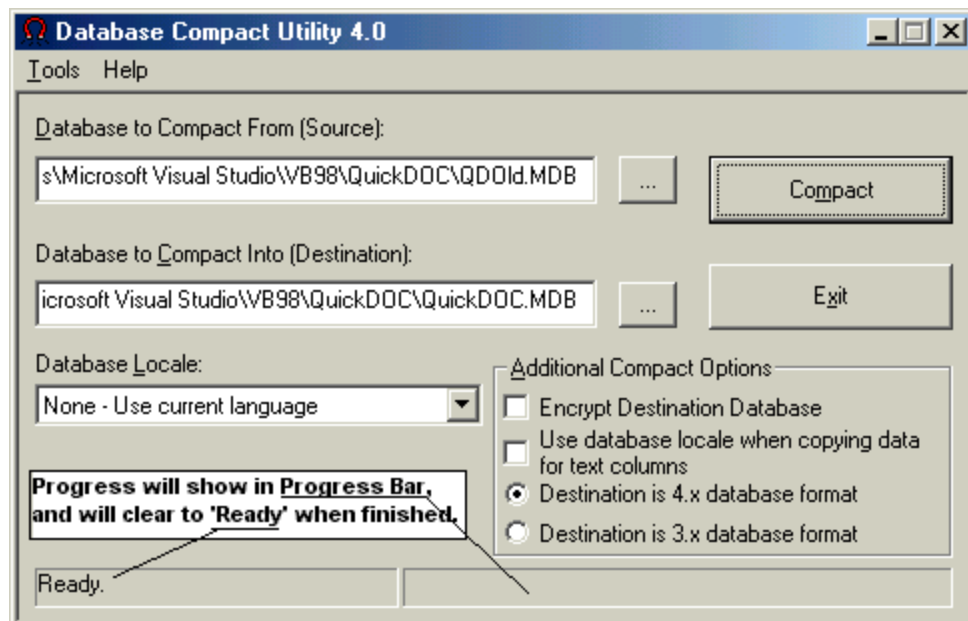
QuickDOC Database Backup

All the data now resides in the QuickDOC.MDB database, which begins at about 4.6MB in size and can increase into the 15-20MB range quickly enough if you have a lot of activity. One of the reasons I usually advise putting the QuickDOC.MDB file on a server is that a **server backup** is usually scheduled regularly.

An additional strategy is to also do a **local backup** at the end of each day, after all users have logged off, by executing a batch file that copies QuickDOC.MDB from its server location to a specified spot on the local C: Drive. It's just a one-line command to: copy [serverlocation]\QuickDOC.MDB C:\[locallocation].

QuickDOC also keeps backups of the raw ASCII text downloads in two \BackImp folders just beneath the QDBorrow and QDLoan folders located just beneath the database folder. While these aren't crucial, and may never be needed, they can function as an audit trail or a lookup for requests that either weren't properly imported into the database or were improperly deleted. In a worst case scenario, they could also be used to rebuild the database should something truly drastic occur. The backups are tagged with the year they were imported as the first four digits, so you could decide to back up only the current year's raw text imports back to the C: drive.

But **backing up the backups of imports** may be more than you think necessary. Backing up the database should suffice, expecially if you have both the typical nightly server backup and a local backup of your own on the C: drive of your machine.

I'll try to work in an automated version of this latter backup process at some point.

BorrowItems Table in QuickDOC.MDB

The primary Table for Borrow information is **tblBorrowItems**. This table contains the following fields:

BorrowRQNO

This is the Request Number field, and is the primary key for this table. It shows up on Grids as the **RQNO column**. It's a text field, with 14 characters available.

BorrowPatronRec

This is the Patron number associated with the record; it identifies the actual Patron involved, and appears at the top left of the first Tab on the Edit Patron form, and in brackets in the Patron field on DOCLINE. As the primary key of the Patrons Table (**tblPatrons**), it will be unique for each patron. It shows up on Grids as the **Patron column**, but is usually translated into it's Name format. It's a number field and is assigned by the program only.

BorrowPatron

This is a text version of the Patron number field, retrieved from the Patron record and displayed in the format Last, First. It's a way to easily display a recognizable Patron without another trip to the database to look it up by number. It is normally hidden on Grids, just to the right of the Patron column, but can be exposed by dragging vertical line in the header of the Patron column to the right, or by clicking **Show All Grid Cols** from the Column Context Menu, and will then appear as the **Name column**. It's a text field with 50 characters available.

BorrowDept

This is the abbreviated form of the Department record and is the primary key of the Departments Table (**tblDepts**), so it will be a unique identifier of the Department. It shows up on Grids as the **Dept column**. It's a text field with 16 characters available.

BorrowLibr

This is the General Code of the Library record. It should be the same as the NLM LIBID if an NLM LIBID is available. It is also the primary key of the Libraries Table (**tblLibs**), so it will be a unique identifier of the Library. It shows up on Grids as the **Libr column**.   It's a text field with 6 characters available.

BorrowCHRG

This is Charge that the Lending Library will apply for the type of request and delivery method requested. It's generally derived from the Library Charge Profile assigned to that library. It shows up on Grids as the **Chrg column**.   It's a Currency field and only accepts numbers.

BorrowYear

This is the year of publication for the item. It shows up on Grids as the **Year column**.   It's a text field with 4 characters available.

BorrowTitle

This is the Journal Title or monograph title for the item. It's retrieved from the Journals Table (**tblJrnls**) through the unique Journal Identifier (JID), which is also kept in the next field. It provides a way to show the Journal Title without another trip to the database.   It shows up on Grids as the **Title column**.   It's a text field with 100 characters available.

BorrowJID

This is the Journal number associated with this item; it identifies the actual Journal (there are default JIDs for Monographs and Audio-Visuals), and appears at the top left of the first Tab on the Edit Journal form. As the primary key of the Journals Table (**tblJrnls**), it will be unique for each title. It is normally hidden on Grids, just to the right of the Title column, but can be exposed by dragging vertical line in the header of the Title column to the right, or by clicking **Show All Grid Cols** from the Column Context Menu, and will then appear as the **JrnlID column**.   It's a number field and is assigned by the program only.

BorrowItemType

This is the type of item requested. It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms.

Code	Displayed As
J	**Journal**
M	**Monograph**
A	**Audio-Visual**
E	Ejournal (not yet implemented)

It shows up on Grids as the **ItemType column**.   It's a text field with 1 character available.

BorrowItemForm

This is the form of item requested. It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms.

Code	Displayed As

C	**Copy**
O	**Original**

It shows up on Grids as the **ItemForm column**.   It's a text field with 1 character available.

BorrowDTSE

This is the Date Sent field. It shows up on Grids as the **Sent column**.   It's a Date/Time field.

BorrowDTRE

This is the Date Received field. It shows up on Grids as the **Recd column**.   It's a Date/Time field.

BorrowDTPD

This is the Date Paid field, referring to payments to the Lending Library (rather than in-house payments from Depts or Patrons). It shows up on Grids as the **Paid column**.   It's a Date/Time field.

BorrowStatus

This is the current status of the request. It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms.

Code	Displayed As
Q	**Queue** (a Loansome Doc just imported)
O	**Outstanding** (not yet rec'd)
N	**Not Filled**
R	**Received**
I	**PaidIFM**
P	**PaidLender**
E	**PaidEFTS**

It shows up on Grids as the **Status column**.   It's a text field with 1 character available.

BorrowDelMeth

This is the Delivery Method requested (or used, once the request is received). It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms.

Code	Displayed As
M	**Mail**
A	**Ariel**
E	**E-mail** (both **PDF** & **TIFF**)
F	**Fax**
K	**PickUp**
W	**Web** (both **PDF** & **TIFF**)

It shows up on Grids as the **DelMeth column**.   It's a text field with 1 character available.

BorrowRushRequest

This field indicates whether the current request is a Rush request or not. It displays as Yes or No. It shows up on Grids as the **Rush column**.   It's a boolean Yes/No field.

BorrowMaxCost

This is MAX COST amount that is sent along with the request. It shows up on Grids as the **MaxCost column**.   It's a Currency field and only accepts numbers.

BorrowLocalStatus

This is the current internal status of the request. It reflects the Local Billing status when items are billed internally to Patrons or Departments. It will be the same in **tblBorrowItems** (revealed through the Borrow Grids) and in **tblBorrLocals** (revealed through the Local Billing Grid) for each item. It's stored in full, rather than as a single letter, in the database field. Legal values are:

Value	Description
Open	Not billed.
InvDep	Invoiced to Department
InvPat	Invoiced to Patron
PaidDp	Paid by Department
PaidPt	Paid by Patron

It shows up on Grids as the **LocalStatus column**.   It's a text field with 6 characters available.

BorrowSRCE

This reflects the Source (or bibliographic utility) by which the request has been sent. It will be LOANSOME DOC for requests received via the NLM Loansome Doc process, whether the item is ultimately filled from the local collection or transferred to DOCLINE. It's stored in full, rather than as a single letter, in the database field. Legal values are:

Value	Description
DOCLINE	Requests entered into DOCLINE
LOANSOME DOC	Requests imported via Loansome Doc
OCLC	Requests entered into OCLC
RLIN	Requests entered into the RLIN system
Mail	Requests sent by Mail
Telephone	Requests made by telephone
Fax	Requests made by fax
Other	Some other locally defined method
Copy Service	Special category to track Copy Service.

It shows up on Grids as the **SRCE column**.   It's a text field with 20 characters available.

BorrowNote

This field contains various notes about the current item. In most cases it will contain only the Payment Number for items marked as PaidLender, PaidIFM or PaidEFTS.   This allows a lookup of payment information when focus is placed in the Status column and the **To Pmts button** is clicked, which shows the **Payments To Lenders Form** for deleting or adjusting a payment. It shows up on Grids as the **Note column**.   It's a text field with 50 characters available.

BorrowExtended

This field is a numeric field and has been set aside for future use.

BorrBibs Table in QuickDOC.MDB

The **tblBorrBibs** table contain bibliographic and other information related to the item in tblBorrowItems by Request Number. Fields are:

BorrBibRQNO

This is the Request Number field, and is the primary key for this table. It associates this record with the record sharing this Request Number in both tblBorrowItems and tblBorrLocals. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a text field, with 14 characters available.

BorrBibCitation

This field contains Citation information. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a text field with 50 characters available.

BorrBibNoPages

This is the **number of pages in the article** as shown in the citation. QuickDOC calculates this at the time the request is saved, but in cases where it can't be calculated automatically or if the calculation is incorrect, it can be changed here. The Number of pages is usually required for Copyright Clearance Center reports, etc.. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a number field where only whole numbers should be entered.

BorrBibArticle

This is the title of the article borrowed. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a text field with 50 characters available.

BorrBibAuthor

This is the author of the article borrowed. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a text field with 50 characters available.

BorrBibCopyright

This is the **Copyright** Statement as supplied with the request. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 1 characters available. Values are:

Value	Description
G	Copyright Guidelines
L	Copyright Law

BorrBibRefReason

This is the **Referral Reason** sent along with the request, if any was stipulated. Referral Reasons used are those used by DOCLINE, although others may be supported in the future. The Referral Reason shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a text field with 3 characters available. Values are:

Value	Description
BDY	At bindery
CAN	Cancelled
LAC	Lacking
LOS	Lost
NOS	Not on shelf
NOT	Not owned (title)
NYR	Not yet received
ORD	On order
OTH	Other
UFR	(wrong) Format

BorrBibPMUI

This is the **PubMed UI** of the request, if any was included. This field may be used to flag duplicate requests, or to do re-sends of items not available for re-posting on DOCLINE. The PubMed UI shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a text field with 10 characters available.

BorrBibPurpose

This is the **Purpose for which the request is made**, which is typically the activity that is supported by this request, such as Patient Care, Education, etc. This information can be added in the Purpose field when entering items directly (in Add Borrow) but is normally not included in DOCLINE requests (there's no field for this in the main DOCLINE form online), although it can be added later by editing this field in the BorrBibs display. Legal values for this field are obtained from the **Purposes Table** (**tblPurposes**) in QuickDOC.MDB and only those values are allowed. The Purpose of each request appears under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name and is a text field with a 6 character maximum.   It's stored in the database as a code (up to six letters), which abbreviates the full description found in tblPurposes.   The Purposes Table initially holds a handful of values, and can be edited directly in Access 2000, but will be available for editing or adding on an edit form in the near future. Startup values in tblPurposes are:

ID	Full Name
EDU	Education
GRA	Grant-funded research
OTH	Other

PC	Patient Care
RES	Research

BorrLocals Table in QuickDOC.MDB

The **tblBorrLocals** table contains local Billing and also Due Dates and Returned Dates for returnable items borrowed. It's related to the primary request information in tblBorrowItems by the Request Number field. Fields are:

BorrLocalRQNO

This is the Request Number field, and is the primary key for this table. It associates this record with the record sharing this Request Number in both tblBorrowItems and tblBorrBibs. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a text field, with 14 characters available.

BorrLocalPat

This is the Patron number associated with the record; it identifies the actual Patron involved, and appears at the top left of the first Tab on the Edit Patron form, and in brackets in the Patron field on DOCLINE. It will be a match for the Patrons column on the Borrow Grid. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a number field and is assigned by the program only.

BorrLocalCHRGAsPatron

This is the Charge that is derived from the Patron/Dept Charge Profile assigned to this patron, and taking into consideration the type of request and delivery method requested. Basically, it cues up a Charge for this request in Local Billing when the Bills are assigned to the Patron. The final CHRG column is populated from either CHRGAsPatron or CHRGAsDept when the actual invoice is created or the item paid (it waits to see who's doing the paying). It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a Currency field and only accepts numbers.

BorrLocalDept

This is the abbreviated form of the Department record and is the primary key of the Departments Table (**tblDepts**), so it will be a unique identifier of the Department. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 16 characters available.

BorrLocalCHRGAsDept

This is the Charge that is derived from the Patron/Dept Charge Profile assigned to this patron, and taking into consideration the type of request and delivery method requested. Basically, it cues up a Charge for this request in Local Billing when the Bills are assigned to the Department. The final CHRG column is populated from either CHRGAsPatron or CHRGAsDept when the actual invoice is created or the item paid (it waits to see who's doing the paying). It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a Currency field and only accepts numbers.

BorrLocalCostCenter

This is the Local Cost Center assigned to be charged for this item. If the Patron has a Primary Cost Center, that will be automatically entered here. In any case, the dropdown box will be filled

with any alternate Cost Centers associated with this Patron. It's a text field with 50 characters available.

BorrLocalItem

This is a display field that exists primarily to make printing Bills easier (no trip to the database to look up the item information that appears on the bill). It's populated at the time the request is created in the database from: Publication Year + the first 60 characters of the Title (from tblBorrowItems). Since it's used for printing Patron/Dept Bills, anything you enter here will appear in the same spot where the Year and Title information normally appear. After the first save, it's only updated if a Journal Change is made in tblBorrowItems, but keep that in mind. . It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 64 characters available.

BorrLocalDelMeth

This is the Delivery Method used to get the item to the Patron. By default, this value is the same as the BorrowDelMeth value, but can be changed to reflect a different internal Delivery Method. Since a Patron/Dept Charge Profile may appoint surcharges to different types of Local Delivery Methods, this value should be considered carefully. Legal values for this field are obtained from the **Local Delivery Methods Table** (**tblLocalDeliveryMethods**) in QuickDOC.MDB and only those values are allowed. It's stored in the database directly, in a **LocalDeliveryMethodName** field and is used to populate any Local Delivery Method dropdown combo boxes, as well as to calculate charges. The Local Delivery Method of each request appears under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name and is a text field with a 20 character maximum. The Local Delivery Methods Table initially holds a handful of values, and can be edited directly in Access 2000, but will be available for editing or adding on an edit form in the near future. Startup values in the tblLocalDeliveryMethods table are:

LocalDeliveryMethodName

Ariel

Email (pdf)

Email (tiff)

Fax

FedEx

Interoffice Mail

Mail

Messenger

Other

Pickup

Web (pdf)

Web (tiff)

BorrLocalRushRequest

This field indicates whether the current request is a Rush request or not. It displays as Yes or No. By default, this value is the same as the BorrowRushRequest value, but can be changed to

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reflect a different internal Rush structure. Since a Patron/Dept Charge Profile may appoint surcharges to a Rush Request, this value should be considered carefully. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a boolean Yes/No field.

BorrLocalCHRG

This is the final Charge that is applied from either CHRGAsPatron or CHRGAsDept when the Billing has been finally decided. It can be entered directly, but may be overwritten if a batch of Patron Invoices include this item (the same would be true if, instead, Dept Invoices are generated for a period in which this request has been received, and the CHRGAsDept value is different from the value entered in BorrLocalCHRG). The final BorrLocalCHRG column is populated from either CHRGAsPatron or CHRGAsDept when the actual invoice is created or the item paid (it waits to see who's doing the paying). It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a Currency field and only accepts numbers.

BorrLocalStatus

This is the current internal status of the request. It reflects the Local Billing status when items are billed internally to Patrons or Departments. It will be the same in **tblBorrowItems** (revealed through the Borrow Grids) and in **tblBorrLocals** (revealed through the Local Billing Grid) for each item. It's stored in full, rather than as a single letter, in the database field. It will be the same when displayed under the associated record display for BorrLocals (by clicking the + sign in the leftmost Grid column) as in the Main Borrow Grid. Legal values are:

Value	Description
Open	Not billed.
InvDep	Invoiced to Department
InvPat	Invoiced to Patron
PaidDp	Paid by Department
PaidPt	Paid by Patron

It shows up under associated record displays under its complete field name.   It's a text field with 6 characters available.

BorrLocalDTRE

This is the Date Received field. It matches the BorrowDTRE value in tblBorrowItems.   It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a Date/Time field.

BorrLocalDTPD

This is the Date Paid field for internal Billing (Patrons or Departments) rather than external Billing (Libraries). It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a Date/Time field.

BorrLocalDTDU

This is the Date Due for Returnable Items. Since this isn't available automatically from DOCLINE, it must be entered directly in any Borrow Grid, using the BorrLocal associated record display. Entry of this date will permit alerts at some future time from within QuickDOC when

items are due back. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a Date/Time field.

BorrLocalDTRT

This is the Returned Date for Returnable Items. Since this isn't available automatically from DOCLINE, it must be entered directly in any Borrow Grid, using the BorrLocal associated record display. Entry of this date will provide a lookup for Lending Library queries about items they haven't yet recorded as returned.   It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a Date/Time field.

BorrLocalInvoice

This field contains Invoice Numbers and Payment Information for Local Billing of this item.   This allows a lookup of local payment information when focus is placed in the Status column and the **To Pmts button** is clicked, which shows the **Payments By Patron Form** or **Payments By Dept Form** for deleting or adjusting a payment. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a text field with 50 characters available.

LendItems Table - QuickDOC.MDB

The primary Table for Lend information is **tblLendItems**. This table contains the following fields:

RQNO

This is the Request Number field, and is the primary key for this table. It shows up on Grids as the **ReqNo column**.   It's a text field, with 14 characters available.

BORR

This is the General Code of the Library record. It should be the same as the NLM LIBID if an NLM LIBID is available. It is also the primary key of the Libraries Table (**tblLibs**), so it will be a unique identifier of the Library. It shows up on Grids as the **Borrower column**.   It's a text field with 6 characters available.

Year

This is the year of publication for the item. It shows up on Grids as the **Year column**.   It's a text field with 4 characters available.

Title

This is the Journal Title or monograph title for the item. It's retrieved from the Journals Table (**tblJrnls**) through the unique Journal Identifier (JID), which is stored in the JID field. It provides a way to show the Journal Title without another trip to the database.   It shows up on Grids as the **Title column**.   It's a text field with 100 characters available.

CHRG

This is Charge to the Borrowing Library for the type of request and delivery method requested. It's generally derived from the Library Charge Profile assigned to that library. It shows up on Grids as the **Chrg column**.   It's a Currency field and only accepts numbers.

ItemType

This is the type of item requested. It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms.

Code	Displayed As
J	**Journal**
M	**Monograph**
A	**Audio-Visual**
E	Ejournal (not yet implemented)

It shows up on Grids as the **Type column**.   It's a text field with 1 character available.

ItemForm

This is the form of item requested. It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms.

Code	Displayed As
C	**Copy**
O	**Original**

It shows up on Grids as the **Form column**.   It's a text field with 1 character available.

EFTS

This field indicates whether the current request is from an **EFTS Library**. On DOCLINE, these requests have the word **Epayment** on the line describing the item's type. Each Library record also has an EFTS field. Only items where the Borrowing Library's record shows EFTS = True and where the item indicates Epayment at the top of the request will show a Yes in this column. This field shows up on Grids as the **EFTS column**, but only if your Library has the EFTS box checked.   It's a boolean Yes/No field.

DTRE

This is the Date the request was Received. It shows up on Grids as the **Recd column**.   It's a Date/Time field.

DTFL

This is the Date action was taken on the request, either filled or not. It shows up on Grids as the **Acted column**.   It's a Date/Time field.

DTPD

This is the Date when payment was received from the Borrowing Library, if there is a payment made. It shows up on Grids as the **Paid column**.   It's a Date/Time field.

Status

This is the current status of the request. It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms.

Code	Displayed As

R	**Received**
N	**Not Filled**
F	**Filled**
I	**Invoiced**
U	**Uploaded to EFTS**
P	**Paid**

It shows up on Grids as the **Status column**.   It's a text field with 1 character available.

DelMeth

This is the Delivery Method requested (or, if the request is not filled, it contains a code for the **Referral (Rejection) Reason**). It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms. Filled requests are:

Code	Displayed As
M	**Mail**
A	**Ariel**
E	**E-mail** (both **PDF** & **TIFF**)
W	**Web** (both **PDF** & **TIFF**)
F	Fax
K	PickUp

Not filled requests contain the Referral Reason, which will be one of the following:

Code	Value	Description
B	**BDY**	At bindery
T	**CAN**	Cancelled
P	**COP**	Copyright Statement not present
C	**CST**	Cost exceeds limits
X	**EXL**	Exceeds copy limit
I	**INC**	Incorrect citation
L	**LAC**	Lacking (issue/volume)
S	**LOS**	Lost
R	**NCR**	Non-circulating
O	**NOS**	Not on shelf
N	**NOT**	Not owned (title)
Y	**NYR**	Not yet received
D	**ORD**	On order
H	**OTH**	Other
W	**POR**	Poor condition
Z	**PRO**	In process
Q	**UFR**	Unacceptable format/routing

U	**USE**	In use

It shows up on Grids as the **Delivery column**.   It's a text field with 1 character available.

ISSN

This is the **ISSN** of the request, if any was included. It's used to look up the journal title in the Jrnls Table. The JID field becomes the final arbiter for Journal Title. It shows up on Grids as the **ISSN column**.   It's a text field with 9 characters available.

MaxCost

This is MAX COST amount that Borrower is willing to pay. It shows up on Grids as the **MaxCost column**.   On the Received Grid, items whose Max Cost value is less than the Chrg value are flagged in red. You'll get a warning if you attempt to change the Chrg column to a value greater than MaxCost, but you'll be allowed to make the change. It's a Currency field and only accepts numbers.

SRCE

This reflects the Source through which the request was received. It's stored in full, rather than as a single letter, in the database field. Legal values are:

Value	Description
DOCLINE	Requests entered into DOCLINE
OCLC	Requests entered into OCLC
RLIN	Requests entered into the RLIN system
Mail	Requests sent by Mail
Telephone	Requests made by telephone
Fax	Requests made by fax.
Other	Some other locally defined method

It shows up on Grids as the **Source column**.   It's a text field with 20 characters available.

Invoice

This field contains Invoice Numbers, EFTS Upload File identifiers and Payment Record Numbers for this item.   This allows a lookup of payment information when focus is placed in either the Status column or the Invoice column and the **To Pmts button** is clicked, which shows the **Payments Form** for deleting or adjusting a payment or Invoice. This column normally appears only in the Library Billing Grid but can be exposed in any Grid by using the Show All Grid Cols choice in the Column Context Menu.   It's a text field with 20 characters available.

JID

This is the Journal number associated with this item; it identifies the actual Journal (there are default JIDs for Monographs and Audio-Visuals), and appears at the top left of the first Tab on the Edit Journal form. As the primary key of the Journals Table (**tblJrnls**), it will be unique for each title. It is normally hidden on Grids (it's the rightmost column on Lend Grids, but can be exposed by dragging vertical line in the header of the Invoice column to the right, or by clicking **Show All Grid Cols** from the Column Context Menu, and will then appear as the **JrnlID column**.   It's a number field and is assigned by the program only.

RushRequest

This field indicates whether the current request is a Rush request or not. It displays as Yes or No. It shows up on Grids as the **Rush column**.   It's a boolean Yes/No field.

Extended

This field is a numeric field and has been set aside for future use.

IFM

This field indicates whether the current request is from an **IFM Library**. If this request is to be paid using the OCLC IFM system, then the value will be Yes.   Each Library record also has an IFM field. Only items where the Borrowing Library's record shows IFM = True will show a Yes in this column. This field shows up on Grids as the **IFM column**, but only if your Library has its IFM value set to True.   It's a boolean Yes/No field.

LendBibs Table - QuickDOC.MDB

The **tblLendBibs** table contain bibliographic and other information related to the item in tblLendItems by Request Number. Fields are:

BibRQNO

This is the Request Number field, and is the primary key for this table. It associates this record with the record sharing this Request Number in tblLendItems. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field, with 14 characters available.

Citation

This field contains Citation information. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a text field with 50 characters available.

Article

This is the title of the article loaned. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a text field with 50 characters available.

Author

This is the author of the article loaned. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a text field with 50 characters available.

Copyright

This is the **Copyright** Statement as supplied with the request by the Borrower. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a text field with 1 characters available. Values are:

Value	Description
G	Copyright Guidelines
L	Copyright Law

Patron

This is the **Patron of the Borrowing Library** for whom the request is made. It's useful mostly as a reminder to the Borrower on Invoices, etc. This field shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name.   It's a text field with 50 characters available.

Holdings Table in QuickDOC.MDB

The **tblHoldings** table contains Holdings information for Journals held at the Library. It's related to **tblJrnls** by the HoldingID field and is intended to be used for automated holdings lookups in a forthcoming version of QuickDOC. There are 12 fields in the Holdings Table:

HoldingID

HoldingStartVol

HoldingEndVol

HoldingStartYear

HoldingEndYear

HoldingNote

HoldingOnlineStart

HoldingOnlineEnd

HoldingOnlineVendor

HoldingOnlineURL

HoldingOnlineElectDelivILL

HoldingOnlineElectDelivPatron