# QDPortal6 Program (Version 1 for DOCLINE 6.1)

## *Introduction*

In March 2019, the *U.S. National Library of Medicine* updated their website DOCLINE to version 6.1. For QuickDoc to continue working with DOCLINE6.1 and later versions a new QDPortal (called QDPortal6) is required. No updates to QuickDoc are required. Remember that QDPortal saves data from DOCLINE and QuickDoc is used to manage that data, they are separate all separate but interwoven entities.

The *U.S. National Library of Medicine* (N.L.M) has left some Inter Library Loan actions on their old website https://docline.gov/docline/ and moved other actions over to their new website https://newdocline.docline.gov/docline/ because of the gradual phasing of functionality from the old website to the new one, QDPortal will need to be updated with each new version of DOCLINE. The QDPortal you have been using will work with the old website (https://docline.gov/docline/) and the new QDPortal6 will work for the new website (https://newdocline.docline.gov/docline/). As of March 4, 2019 to decide which website and application to use for a given action please adhere the chart (p. 2) provided by N.I.H.

# DOCLINE Update | Original & DOCLINE 6.1 - what's where?

02/15/2019

After the DOCLINE 6.1 is released, use the table below to determine which version of DOCLINE you should use to complete these common DOCLINE and Loansome Doc tasks.

## DOCLINE

### I want to:

| | Original DOCLINE | DOCLINE 6.1 |
|---|---|---|
| Get an article from another library (borrow) | ☒ | ☑ |
| Receipt and update another library's *new* request for an article (lend) | ☒ | ☑ |
| **View or Download Request Statistic Reports** | | |
| Requests prior to March 4, 2019 | ☑ | ☒ |
| Requests after March 4, 2019 | ☒ | Coming in 2019* |
| **Search for a Request** | | |
| Requests prior to March 4, 2019 | ☑ | ☒ |
| Requests after March 4, 2019 | ☒ | ☑ |
| **Create EFTS Billing File** | | |
| Requests prior to March 4, 2019 | ☑ | ☒ |
| Requests after March 4, 2019 | ☒ | Coming in 2019* |
| Update library information | ☒ | ☑ |
| Update holdings information | ☒ | ☑ |

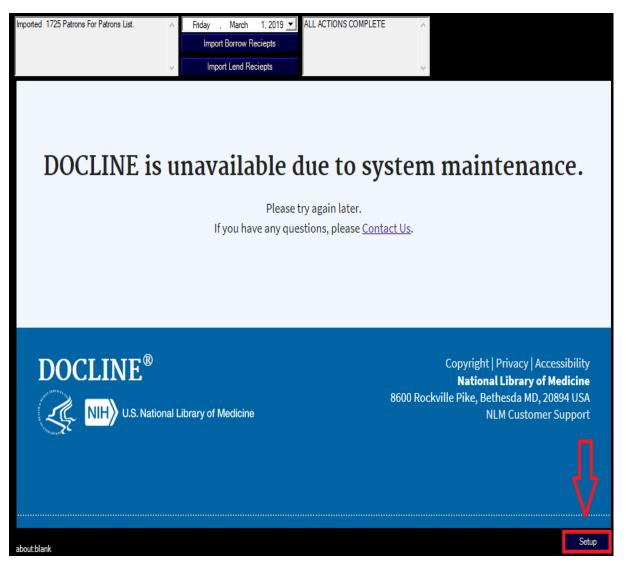*DOCLINE 6 statistic reports and billing features will only include requests placed in the new system.

## Loansome Doc (LD)

### I want to:

| | Original DOCLINE | DOCLINE 6.1 |
|---|---|---|
| Use LD to request a PubMed article (PubMed/LD patron site) | ☑ | ☒ |
| Receipt and update LD requests (DOCLINE LD lending) | ☑ | ☒ |
| Transfer a LD request into DOCLINE or create ILL request from LD request (LD Transfer) | ☒ | ☒ |
| Create or download LD patron contact lists | ☑ | ☒ |

*Instructions Setup*


1. Follow the Installation Instructions for QDPortal6 available for download at **http://quick-doc.com/**.

2. Ensure your account for DOCLINE6.1 is in order by using a Web Browser (e.g. Internet Explorer, Google Chrome, Firefox, Microsoft Edge, etc.…) to search https://newdocline.docline.gov/docline/ and attempt to log in. For help, questions or issues regarding your <u>DOCLINE account</u> please refer to the U.S. National Library of Medicine's Frequently Asked Questions webpage https://www.nlm.nih.gov/docline/faq.html

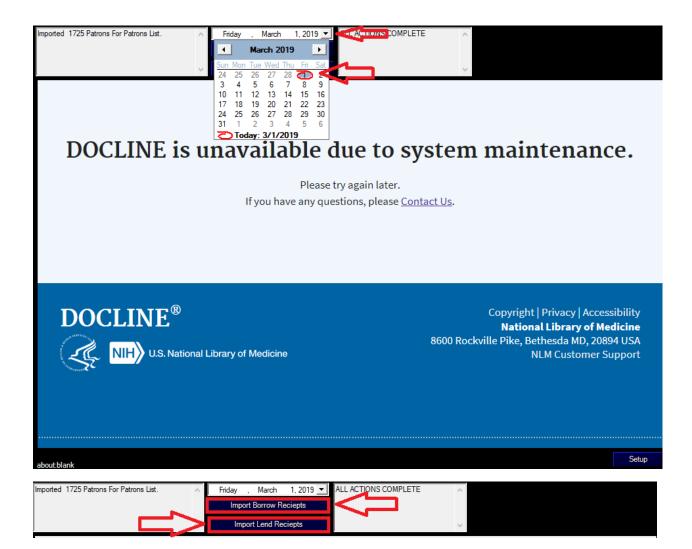3. Open the QDPortal6 application and click the "**Setup**" button

4. In the Setup Form enter "https://newdocline.docline.gov/ " into the "**DOCLINE Address**" field, click **Apply** then click **OK** it is **important** that you leave the setup of the old QDPortal application as is and only do this in the new QDPortal6



***Instructions Usage***

1. Use the new DOCLINE website as instructed by N.L.M. it works in similar fashion to their old website most changes are purely visual

2. To import Borrows, Lends, and Lend Updates from a given day choose the date the borrow or lend receipt of issued by DOCLINE then click either the Import Borrow Receipts or Import Lend Receipts Button depending on which you want to import. Because Lend Receipts and Borrow Receipts can be update latest actions by DOCLINE days after they were issued (e.g. a lend being filled) It is recommended that you import Borrows and Lends at the end of every day. If you happen to miss a day fear not, for you can select days in the past and retrieve the data so long as it is available on the DOCLINE website.

## *Import Release Notes*

1. We did our very best to launch QDPortal6 bug free! but should any arise please contact us by email at support1@nesurv.com or by phone at (617) 738-1800 and we will fix them as soon as possible

2. Currently(3/3/2019) only lend receipts with the latest action description of "Filled" or "Received" will be imported to QuickDoc. Some fields in QuickDoc(such as how the request was filled) may need to be manually entered.