

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 <i>new</i> 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 DOCLINE account 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

The screenshot shows the QDPortal6 application interface. At the top, there is a navigation bar with a date dropdown set to "Friday, March 1, 2019" and a status indicator "ALL ACTIONS COMPLETE". Below the navigation bar, there are two buttons: "Import Borrow Receipts" and "Import Lend Receipts". The main content area is a light blue box with the text "DOCLINE is unavailable due to system maintenance." and "Please try again later. If you have any questions, please [Contact Us](#)." The bottom of the page features the DOCLINE logo, the NIH logo, and the text "U.S. National Library of Medicine". On the right side, there is contact information: "Copyright | Privacy | Accessibility", "National Library of Medicine", "8600 Rockville Pike, Bethesda MD, 20894 USA", and "NLM Customer Support". A red arrow points to a "Setup" button in the bottom right corner of the page.

Imported 1725 Patrons For Patrons List. Friday, March 1, 2019 ALL ACTIONS COMPLETE

Import Borrow Receipts

Import Lend Receipts

DOCLINE is unavailable due to system maintenance.

Please try again later.
If you have any questions, please [Contact Us](#).

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about:blank **Setup**

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

Imported 1725 Patrons For Patrons List. Friday, March 1, 2019 ALL ACTIONS COMPLETE

Import Borrow Receipts
Import Lend Receipts

DOCLINE is maintenance.

QDPortal Setup

License

DOCLINE User Id [redacted]
DOCLINE Password [redacted]
DOCLINE LIBID [redacted]
Default for # of days not needed after Date [redacted]
DOCLINE Address <https://newdocline.gov/>
Default Routing Prefix [redacted]
Send Patron Number Only (No Names)

OK Apply Cancel

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about:blank Setup

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.

Imported 1725 Patrons For Patrons List. Friday, March 1, 2019 ALL ACTIONS COMPLETE

March 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	25	26	27	28	29	30
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Today: 3/1/2019

DOCLINE is unavailable due to system maintenance.

Please try again later.
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about:blank Setup

Imported 1725 Patrons For Patrons List. Friday, March 1, 2019 ALL ACTIONS COMPLETE

- Import Borrow Receipts
- Import Lend Receipts

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.