Updating from QDLend

Installation

Download and install QuickDOC as you would for a new installation (see Installation, above). While you can install in the same folder as QDLend, it makes sense to create a new folder, so that you can easily uninstall QDLend and delete its files once the full QuickDOC program is functioning satisfactorily.

The default installation folder will be C:\Program Files\QuickDOC in most systems, but you can choose another if that's more convenient.

The installation program for QuickDOC will update some of the QDLend support files (it uses Microsoft Data Access Components version 2.6 instead of 2.5 of QDLend, so you may see a message about installing MDAC 2.6 and requiring a reboot of the computer to continue), but others will have been installed already, which will speed up the installation process.

Once you've decided where your QuickDOC folders will be located, find the **QDSetup.exe** (or **QD20.exe** for Web-Based installs) file (either in your download folder or at the network site where you saved or moved it) and execute it (a double-click will do it). The Wise Installation Program will begin.

The QuickDOC Shortcut on the Desktop

Take the defaults during the installation program, unless you've decided to install the program files in a folder other than C:\Program Files\QuickDOC, and you'll be left back at the Desktop with a new **QuickDOC Shortcut icon** (it's the same as your old QDLend icon).

When you click on this icon for the first time, the process of moving your data from the old QDLend.MDB to the new QuickDOC.MDB will begin.

Database location for Updates from QDLend

The QuickDOC.MDB database will be located initially in the following manner:

1. **QDLend.MDB was on either the C: or D: drive**: The new QuickDOC.MDB will be located in the same folder as the program itself (i.e., the spot you chose during installation, generally C:\Program Files\QuickDOC). This should help alleviate some of the confusion in finding the database file that existed in QDLend. You can still move it to a server location (or anywhere else for that matter) but the default will be right where the program itself is running.

2. **QDLend.MDB was on a network share** (anything but C: and D: usually---but not always---means that this is the case): The new QuickDOC.MDB will be located in the same folder that currently holds QDLend.MDB. This should ensure minimal disruption of current configurations. Both QDLend.MDB and QuickDOC.MDB can co-exist, side by side, but since all the data in QDLend.MDB will be transferred to QuickDOC.MDB, after some time of testing to be sure all is well, the QDLend Program, and the QDLend.MDB database, can be deleted. No reason to rush on that, though.

What will be transferred from QDLend.MDB?

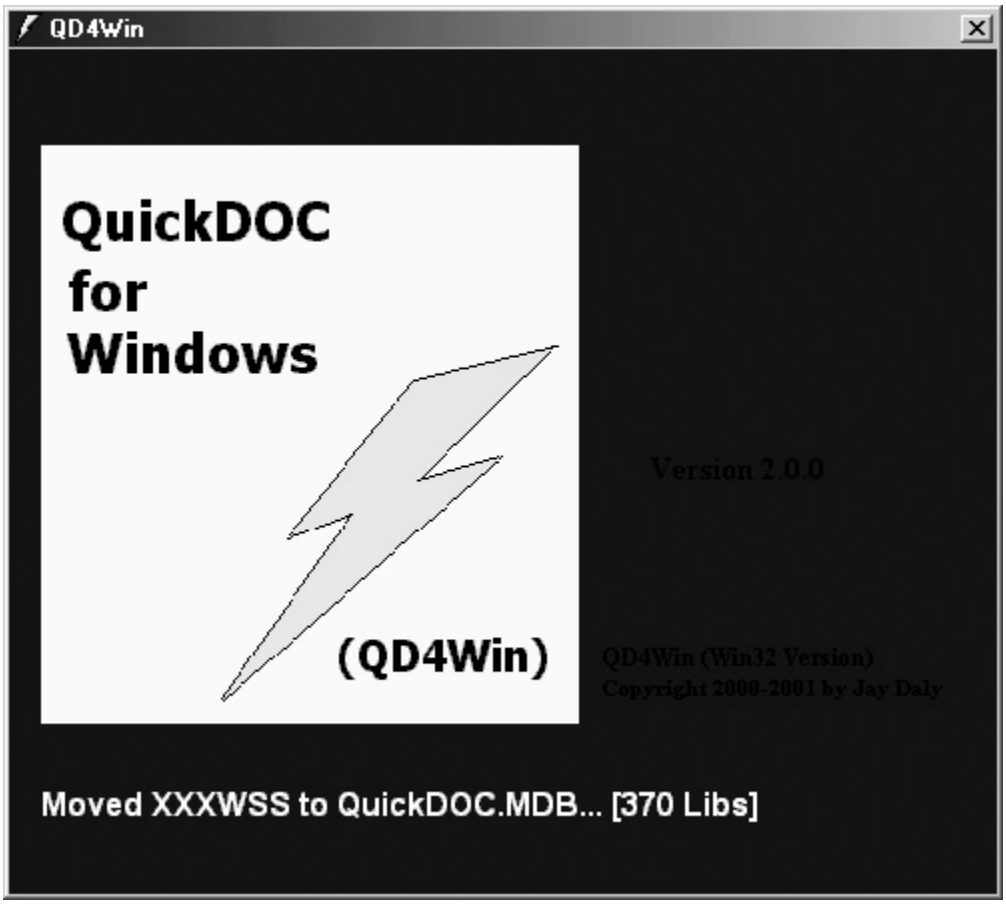
1. All the Borrowers created in QDLend will be moved to the much more expansive Libraries Table in QuickDOC (tblLibs).

2. The Titles Table in QDLend will be matched against the much larger tblJrnls in QuickDOC, and any Journal Title not already in the new Table will be brought over.

3. All items in the Credits, Deposits, Invoices and Payments tables will be moved over to similar tables in the new database.

4. All Lend Items from the old database will be moved to the new one. Since the new database has a more intricate set of connections amongst tables, each of these old items will be double-checked in the new database to be sure that all proper interconnections exist.

Because the new database structure is much more detailed than the old one, this checking may take some time to complete, but there will be visual notices on the Splash Screen as the process continues:



If there are any problems with moving the data, you may see Message Boxes like:

```
      Problem Moving Records from [a Table] in QDLend.MDB
You may need to enter items manually or import from the File Menu.
```

You can generally ignore these, since the Tables already exist in the new QuickDOC.MDB database, for smaller tables such as Credits, Deposits, etc. In most cases, when you receive this message for those tables, it means that they don't exist in the old database (as they wouldn't if you were still running a QDLend version earlier than 1.5.6). If the message appears for the Invoices table, or the Payments table, then that is a different can of worms, since those have existed for some time. You may need to re-enter data, using Access 2000, if that occurs.

Ignore the 'Import from the File Menu' note, in any case, since it doesn't work between QDLend and QuickDOC at this time.

First Use --- Follow These Steps

Step One: Run the Setup Form

Once the records from the old QDLend.MDB database have been moved over to the new QuickDOC.MDB, you'll be brought either to the blue QuickDOC screen or to the Setup Screen. If you arrive at the blue screen, click 'Setup' on the Menu Bar and then 'Setup Form' to bring it up.

The **Setup Form** will retain many of the choices made in QDLend (and also QDPortal, which writes to the same part of the Registry as the QuickDOC program in many cases). Most of the data will therefore already be filled in if you're updating from QDLend.

These items are used by QDPortal, as well as by QuickDOC:

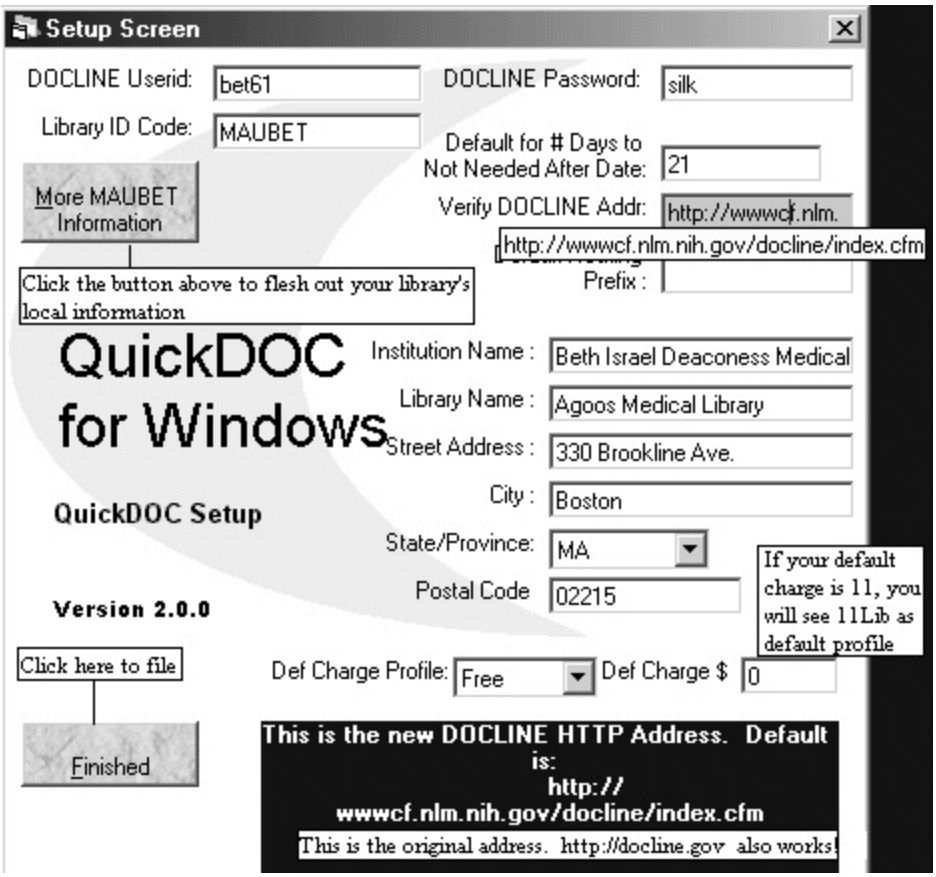
The **DOCLINE UserID** and **DOCLINE Password** should match those given you by DOCLINE.

The **Library ID Code** is your library's NLM LIBID.

The **Default # Days** will compute a Not Needed After Date for each request based on this number of days.

The **DOCLINE Address** is either the original http://wwwcf.nlm.nih.gov/docline/index.cfm or the latest abbreviated version: http://docline.gov. They both work as of 12/2001.

The **Default Routing Prefix** (partially obscured by the Tool Tip below) should be filled in only when you typically send most of your requests to one library on the first route. If that's the case for your library, then put their LIBID in this field; you can then click a button in QDPortal to fill in that field on DOCLINE automatically.



The values to check on updating are:

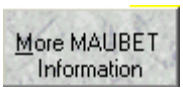
1. Make sure the Street, City, State and Postal Code values have been properly translated from the old QDLend single-line format. If they are not, then you can fix them while editing your library information, and then again here.

2. The Default Charge Profile will have been created from the Charge that was filed with your library in QDLend. If that charge was $11.00 then the Charge Profile created will be named 11Lib. If your typical charge was $3.00, then you'll see a Charge Profile of 3Lib. If your QDLend record showed a charge of 0.00 then your profile will show 'Free', as above, with a Default Charge of 0.

If you click the Down Arrow on the right of the Charge Profile box, you'll see a list of Charge profiles created as a result of the transfer of data from QDLend. Any Library in QDLend with a charge associated with it will generate a Charge Profile in QuickDOC with the format of: [that Charge Amount] Lib. If your typical charge is $11.00 then there will be a Charge Profile of 11Lib, with an initial value of $11.00 charge for Borrow and $11.00 charge for Lend. Nothing is assumed in the Fax Surcharge or Rush Surcharge areas of the Profile. These you will create later.

Step Two: Check Library Information from QDLend

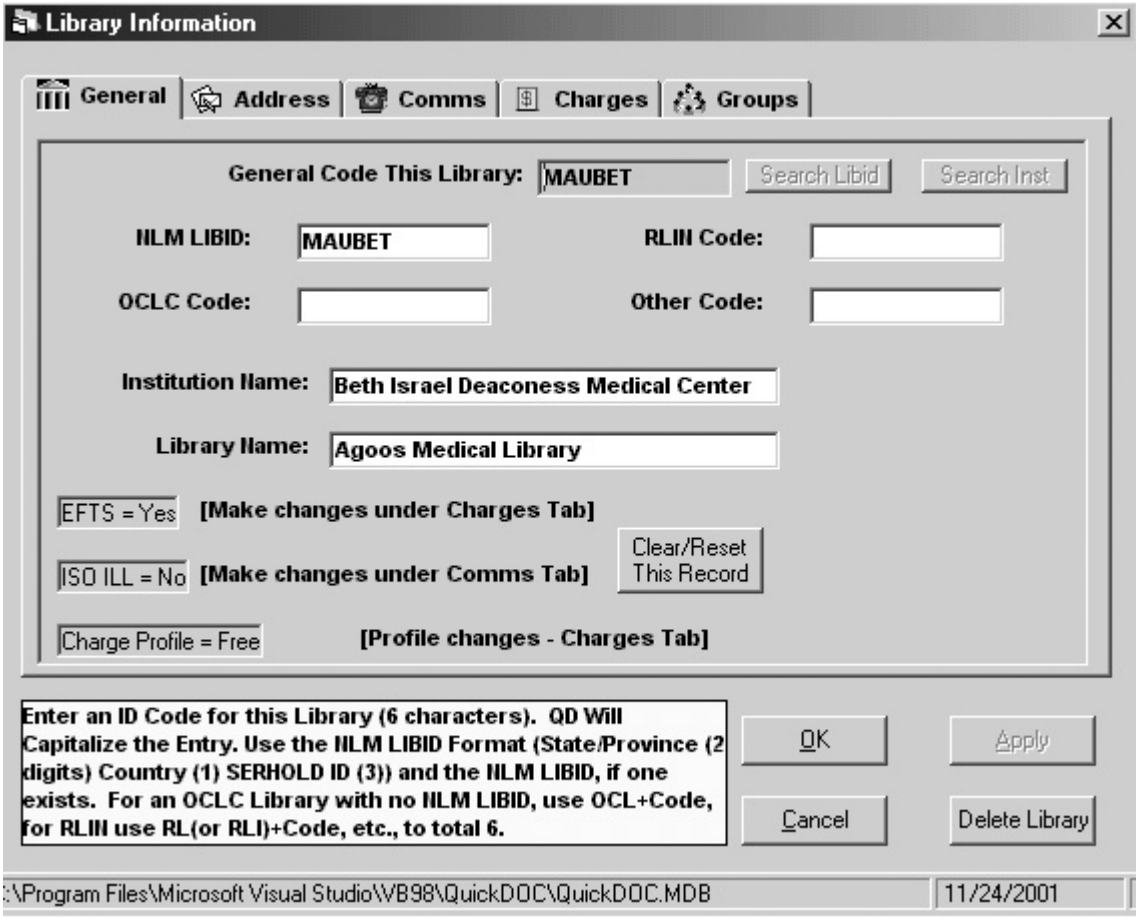
Click the [More (your LIBID) Information] button. For library MAUBET (which is my Beth Israel Deaconess Medical Center here in Boston), the button looks like this:



This button brings up the Library record for your local library values (which include many of the defaults that the program will assume in various circumstances). The Default Local Delivery Method, for example, will be the one you've chosen in your Library record. Records for Libraries are displayed with a number of Tabs.

Library Form – The General Tab

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



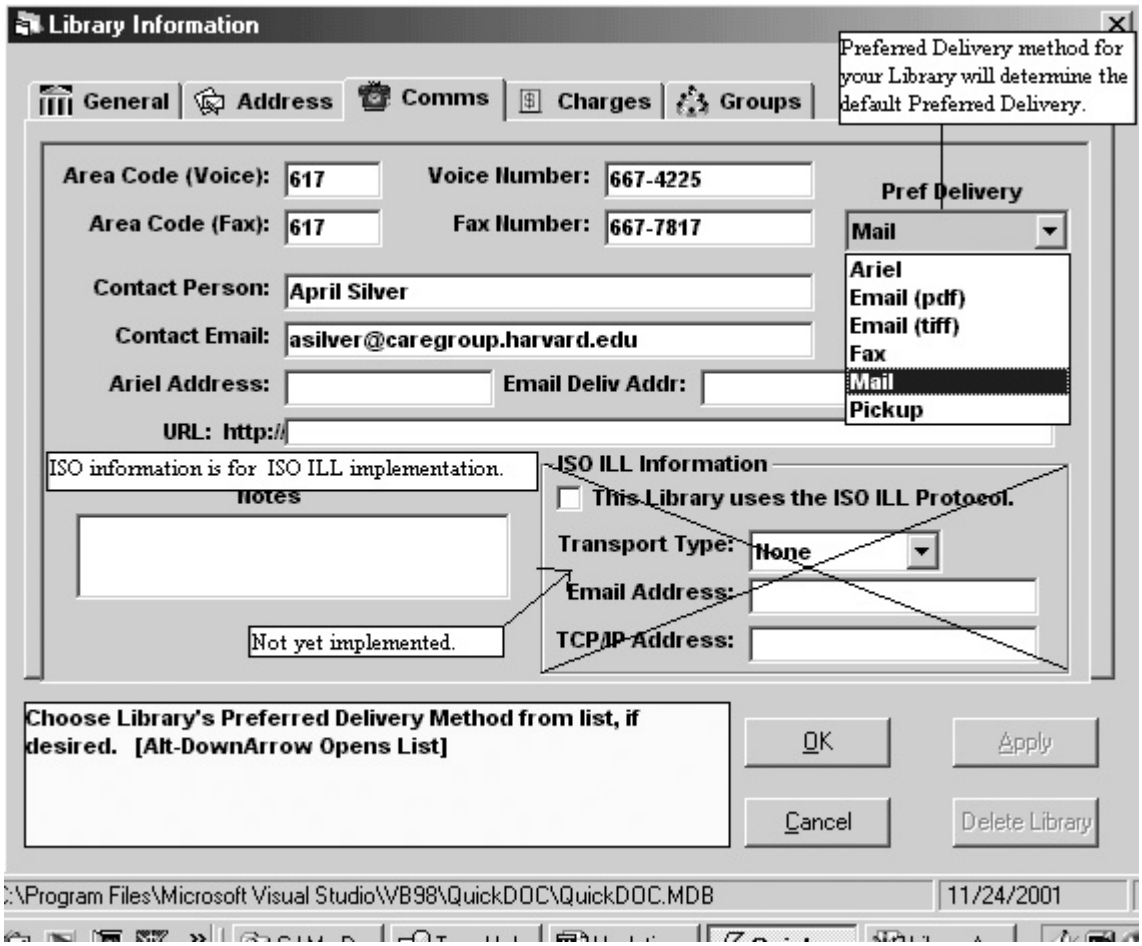
The General Code and the NLM LIBID should be the same. Add any other values.

Library Form – The Address Tab

The Address Tab contains local address information. This should have been transferred from QDLend, but check to be sure the Address values were parsed out properly.

Library Form – The Comms Tab

The Comms Tab has local communications information.



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.

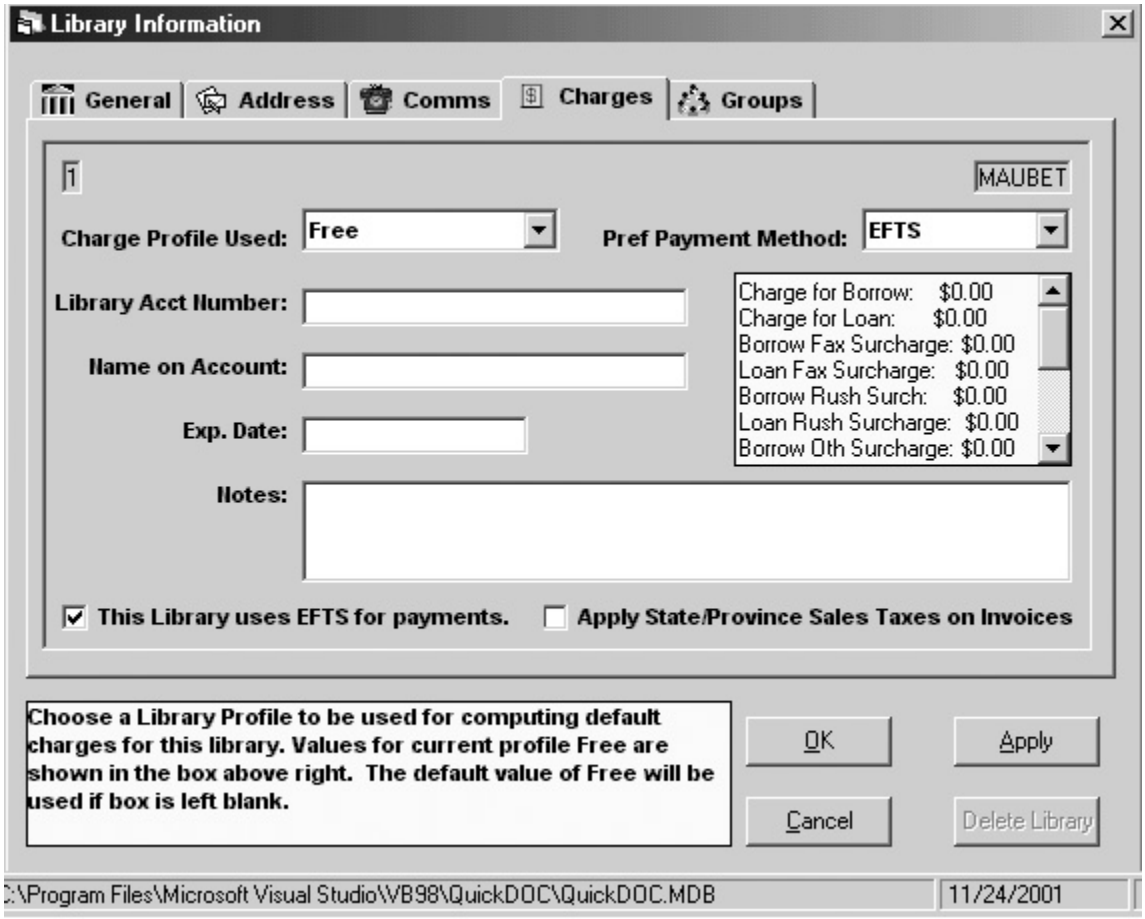
Library Form – The Charges Tab

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 here will function as the **Default Charge Profile** that is applied to newly created libraries**.**

Charge Profiles that determine how you charge and are charged by other libraries are filed with those library records.

The Preferred Payment Method combo box will also set the **Default Library Payment Method** (currently this is set as "Mail" but will be configured shortly, so that the choice EFTS shown below will become the default for new Libraries.

The “This Library Uses EFTS For Payments” checkbox, however, should be checked 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.



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

To **edit Library Charge Profiles**, use the menu choice under the Setup Menu.

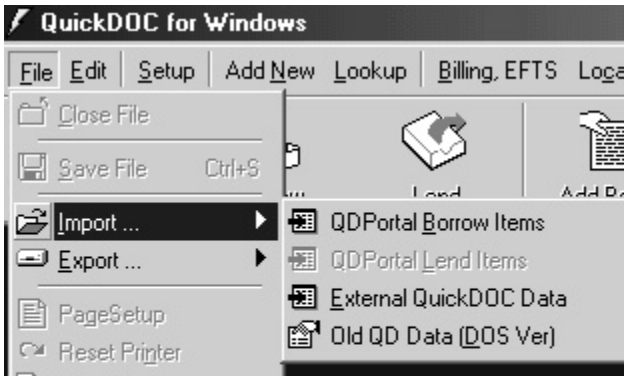
Library Form – The Groups Tab

This Tab is used in other Library records to assign various Groups (called General and Special in old QD).

Step Three: Import Dept, Patron & Borrow Information from old QD

Before performing the first Borrow import from saved QDPortal records, import Department and Patron records from old QD. If you were using the Patrons List in QDPortal and some of those records were imported from old QD, then you need the [Patron Numbers] in brackets to effectively match up the QDPortal Patron records. And we need the Department records that pertain to each patron. Patrons no longer needed can be deleted after import, and after the initial import from QDPortal Borrow records is complete.

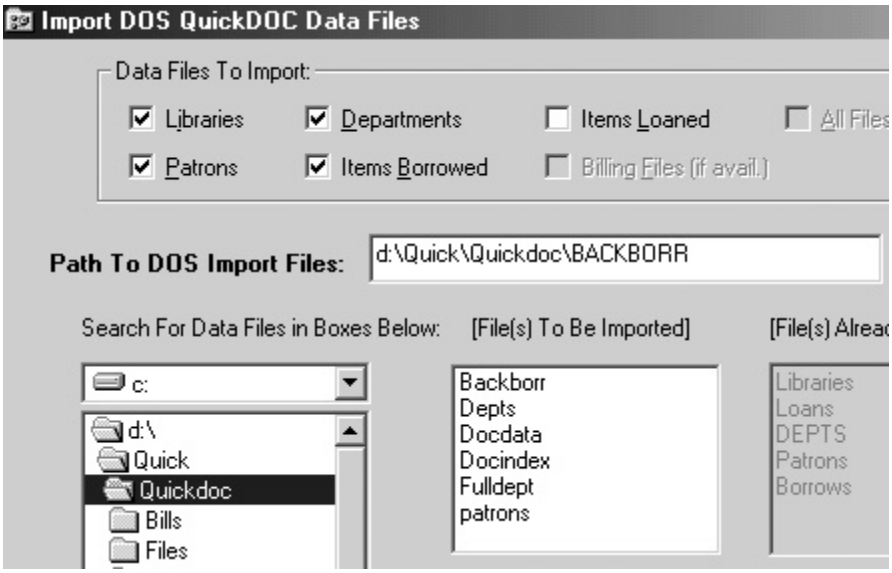
The **Import Old QD Data** (DOS Ver) menu choice is under the File Menu, Import choice.



This brings up the Import DOS QuickDOC Data Files form. If you've already imported Libraries or Lend Items from old QD, then the "Path To DOS Import Files" will be filled in properly (assuming you haven't changed computers since then). If nothing has been imported before, use the Drive and Folder boxes to find the location of the old QD files (it looks for a folder with a file called QDCOMMS, which all old QD directories have, and displays relevant files if that file is found).

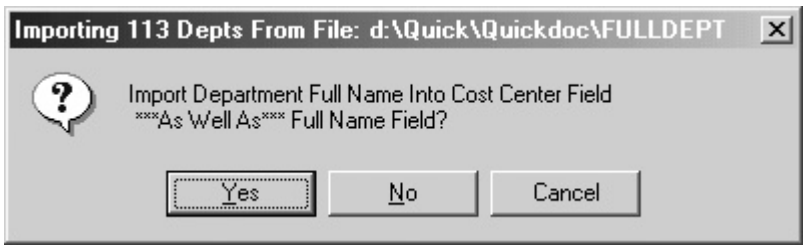
First, if you're going to import any of the Borrow Items you've stored in old QD, set the **Import Date to Begin** importing Borrow Items (or Lend Items, for that matter). You can always come back and import earlier Borrow Items later.

Check the Libraries box if you haven't already done so in QDLend (if it's already been imported then you don't need to do it again, although it won't duplicate anything that's already in there). Check the Patrons and Departments boxes, and the Items Borrowed box if you want to also import old QD Borrow Items from Jan 1, 2000 (the default Begin Date) or earlier.



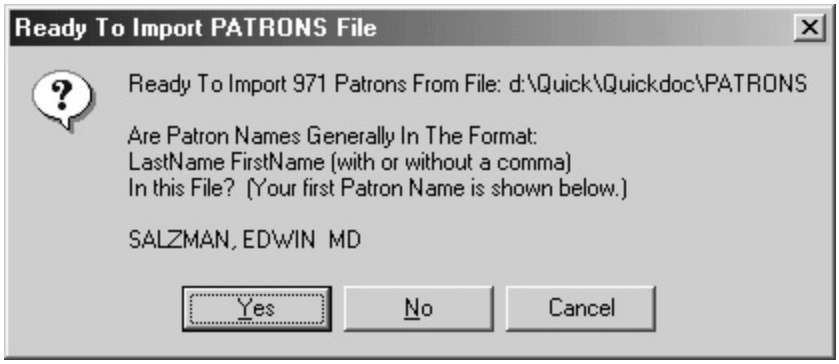
Importing Departments

The first group to be imported will be Departments (which are needed for proper Patron and Borrow Item imports). For those who might have used the Department Full Name field in old QD as a Cost Center field, you can also populate the Cost Center field in the new database:

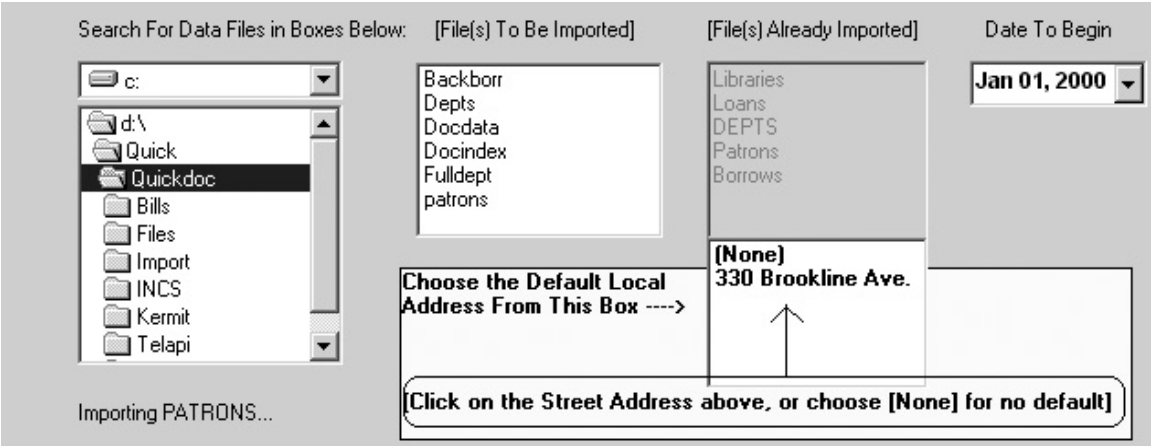


Importing Patrons

After Departments are imported, Patron Imports begin. In order to properly parse the Patron Name line in old QD, the import program will first ask about the typical format for Patron Names in old QD:



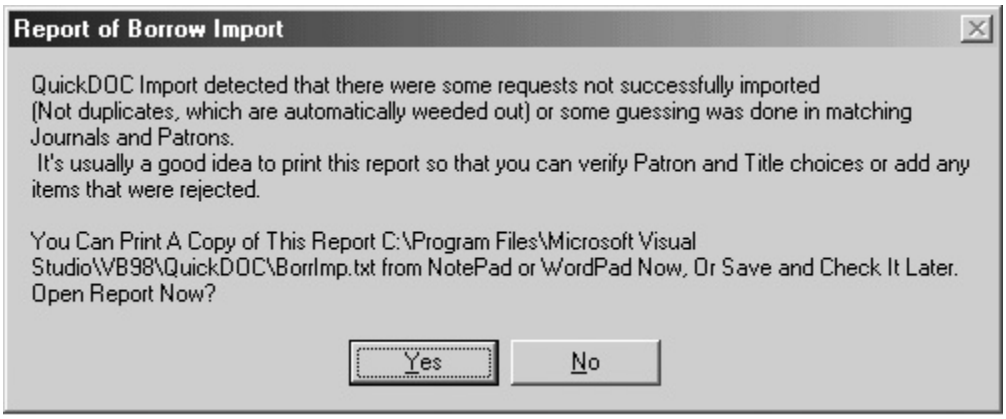
You'll also be asked for the default local address to be assigned to each Patron (Patron addresses weren't saved in old QD, but Dept Addresses were, so if any addresses were imported along with Departments, they should appear in the List Box. Otherwise, (None) will be the only choice.



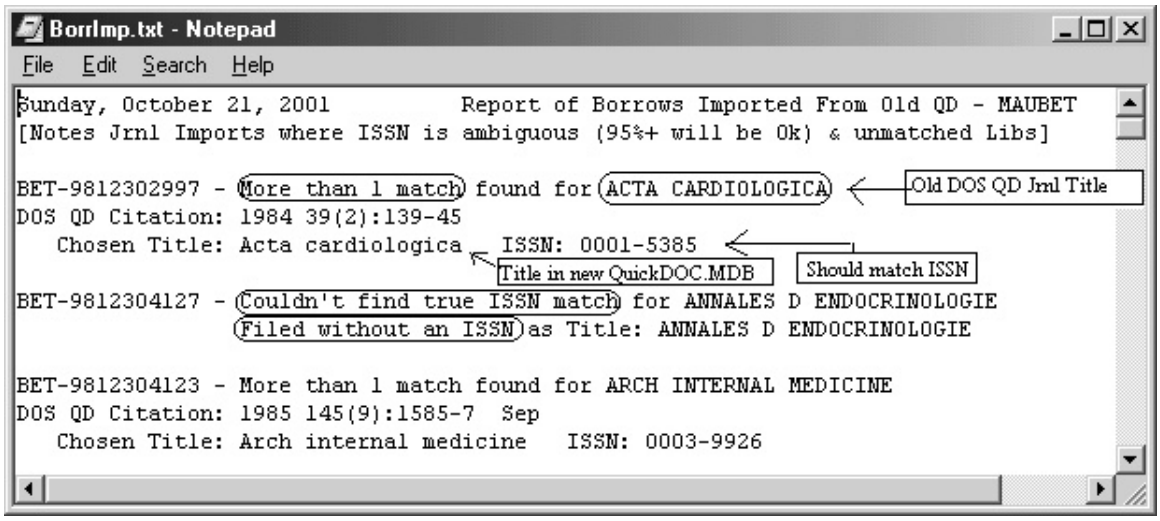
Click on either (None) or an alternate address to apply it to Patrons imported. Patrons with different addresses can be edited later.

Importing Borrows

Once the Patrons and Departments are imported, older DOS QD Borrow Items are imported, matched to the proper Patron and Department from the prior import. The import process also tries to match the Journal Titles from old QD to the Jrnls Table in the new QuickDOC. There will usually be some guessing on Journal Titles, etc.



A typical BorrImp.txt file looks like this:

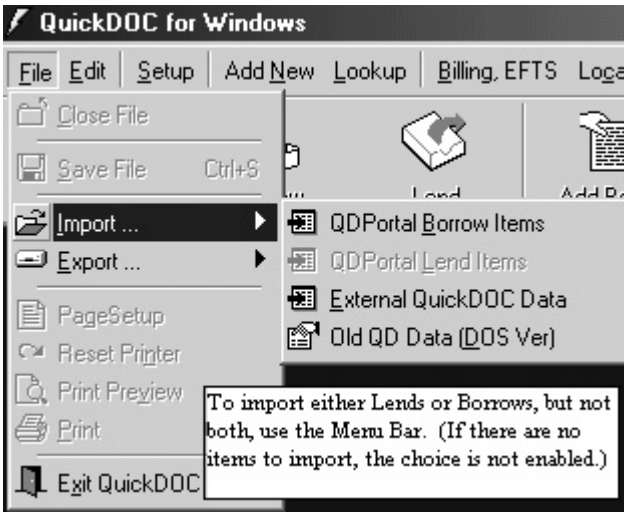


Once Patrons and Departments have been imported, we're ready to do the first import from QDPortal saved items.

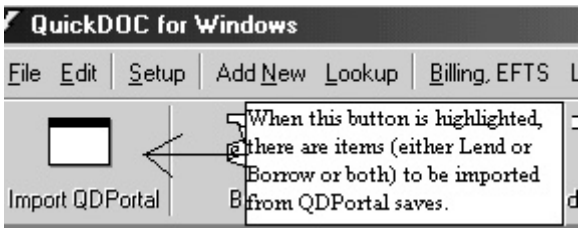
Step Four: Initial Borrow Import from QDPortal Saved Items

QDPortal saves items from DOCLINE sessions in the folder C:\QDBorrow. Unlike the QDLend process, QuickDOC requires some action to begin importing (QDLend did it automatically upon startup). You can use either the File Menu method or the Import QDPortal Button method.

The **Import QDPortal from the File Menu, Import** choice: The File Menu allows you to choose to import just the Borrows or just the Loans. In most cases you'll want both, but this choice is available for the times when it's needed.

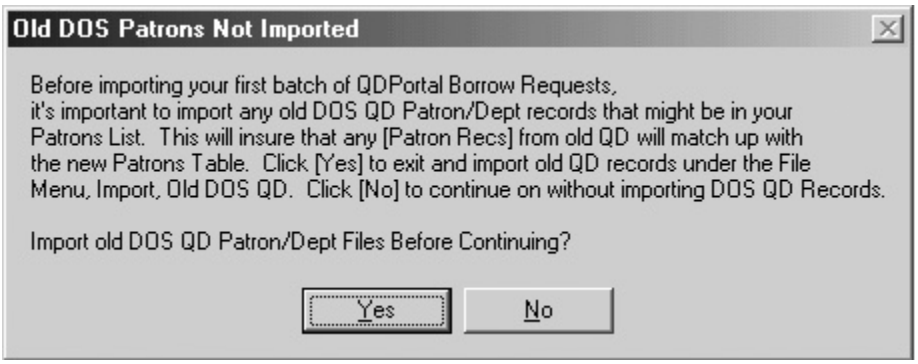


The **Import QDPortal Button** will import items from both the Lend and Borrow saved items. This is the easiest method and most often used. If this button is enabled (not grayed out), then you know that there are some items to import. Just click to begin import.



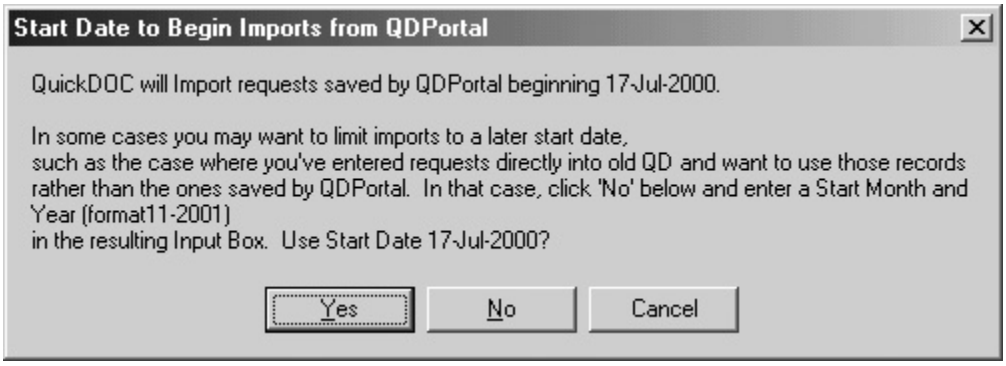
First Borrow Import from QDPortal

The first time you click the Import QDPortal Button (or choose QDPortal Borrow Items from the Import Menu), a few checks are made. If you haven't imported the old DOS QD Patrons file, you'll see a Message Box asking

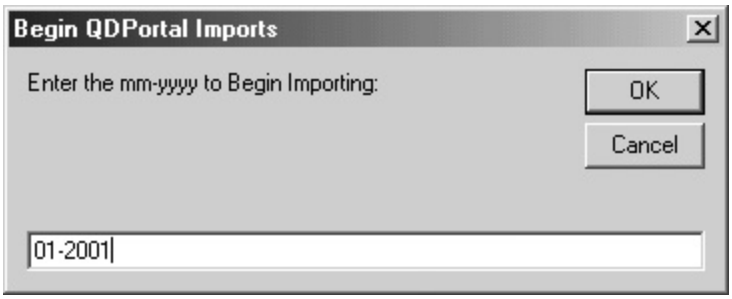


If you don't want to import your old DOS QD Patrons, click No and continue. The Patron match will be a bit less determinate.

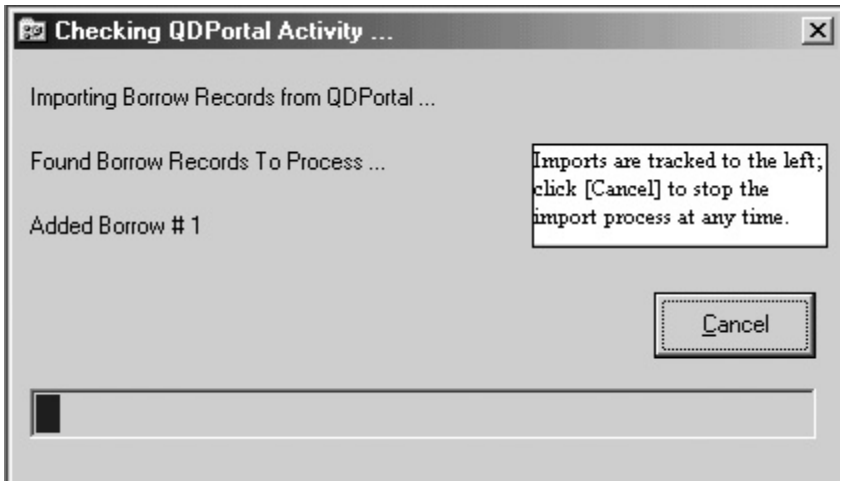
On the first import only, there will be another question: Which date to begin the Import? The default date will be the first new DOCLINE date, July 17, 2000. Use this opportunity to move the start date to a later date if perhaps you've entered new DOCLINE data into old QD and want to use the old QD versions until a certain date when you will use the versions saved in QDPortal.



If the default start date of 17-Jul-2000 is okay, just click Yes. If you click Cancel the process will be cancelled. If you click No you can choose a new Start Date in the Begin QDPortal Imports Start Date input box.



Once the date is settled, the import will begin.



If you want to cancel the import, click the Cancel button; otherwise, let it run through to the end. It may take some time, depending upon how many items you have in your C:\QDBorrow folder, and the speed of your machine (up to a couple of hours for very large, complicated files).

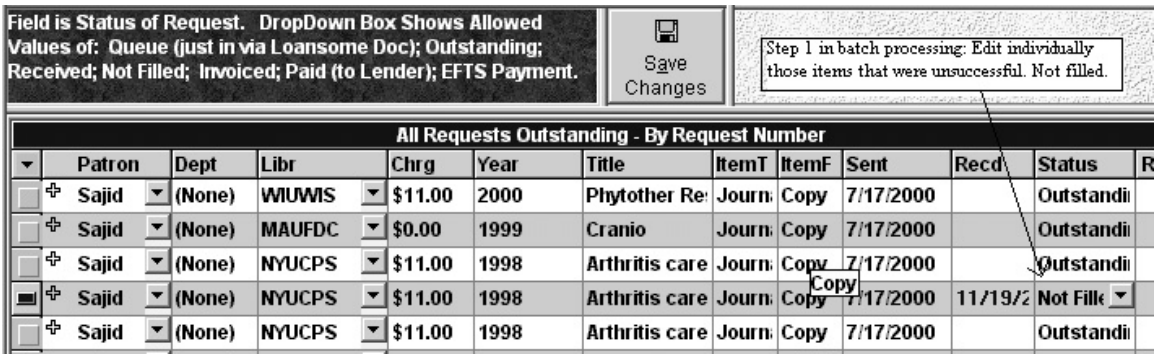
Once the process is finished you'll be back at the blue QuickDOC screen, with the new QuickDOC Toolbar:

Step Five: Process Unsuccessful Items from QDPortal Import

[Step One in Batch Processing]

Click the "Borrow" button above 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.

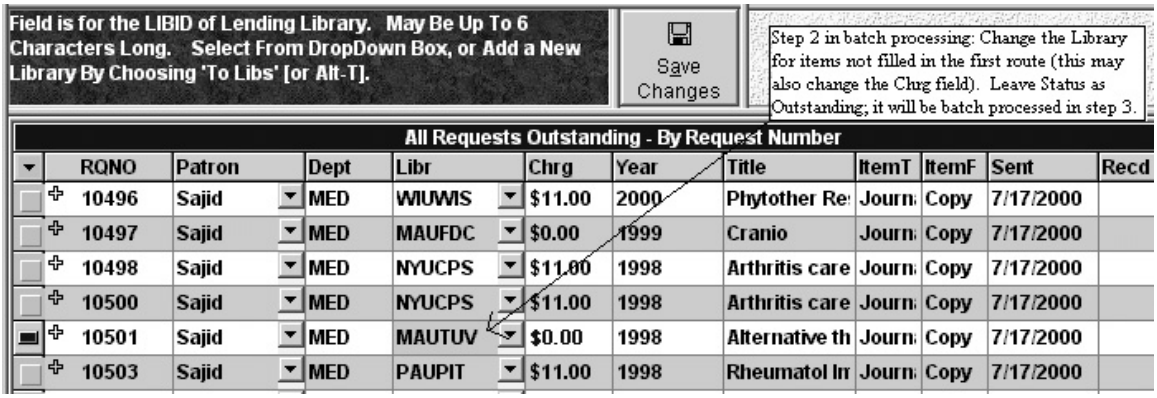


You can also sort by any column in this list to make it easier to find these items. Just click the header above the column you want to sort and choose “Sort Ascending” or “Sort Descending.”

Step Six: Process Received Items with new Lenders in QDPortal Import

[Step Two in Batch Processing]

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.

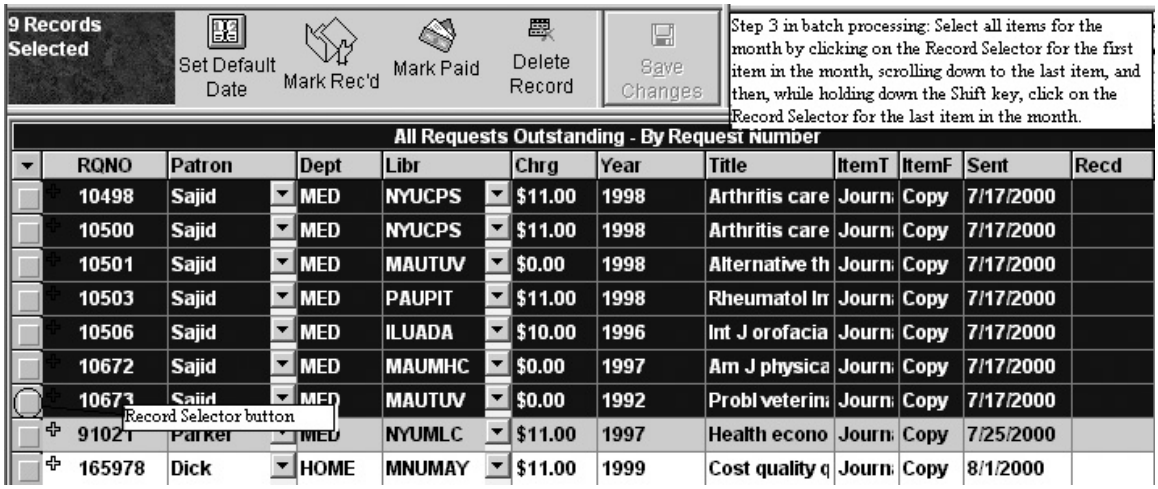
Step Seven: Process All Other QDPortal Import Items to Received

[Step Three in Batch Processing]

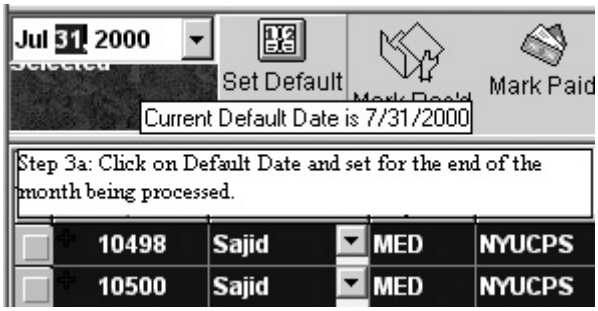
Everything else on the list should now be a Received Item, with only the Date Received to be determined. For the purpose of batch processing, you can choose a common date and then batch process any number of items to Received, with that common Received Date.

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

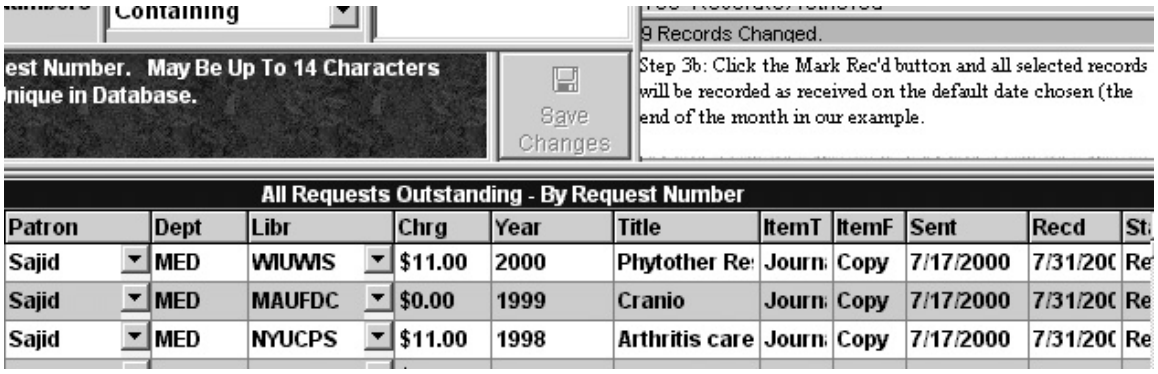
row in that month (or choose a date before the end of the month when a common Received Date will best work). This will select all the items in that month for processing.



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.