What's New in QuickDOC 2.1.8

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QuickDOC and QDPortal

QDPortal Version 1.1.2 is compatible with **DOCLINE Version 3.0**, released in October, 2006. Because we need to be able to recognize text files saved during earlier versions of DOCLINE, QuickDOC and QDPortal will always be backward compatible with all earlier DOCLINE versions.

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

http://nnlm.gov/quickdoc/InstallQDP.html

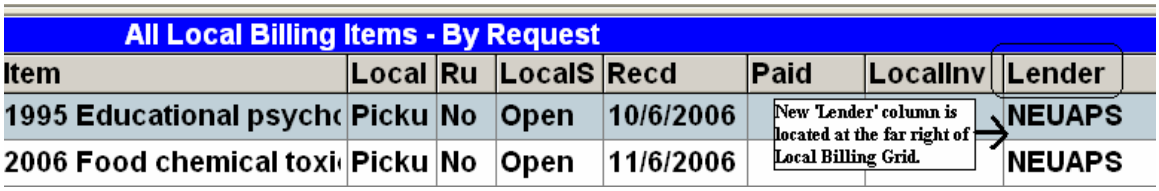
Download information for QuickDOC (latest version 2.1.8) is always available at:

http://nnlm.gov/quickdoc/InstallQD.html

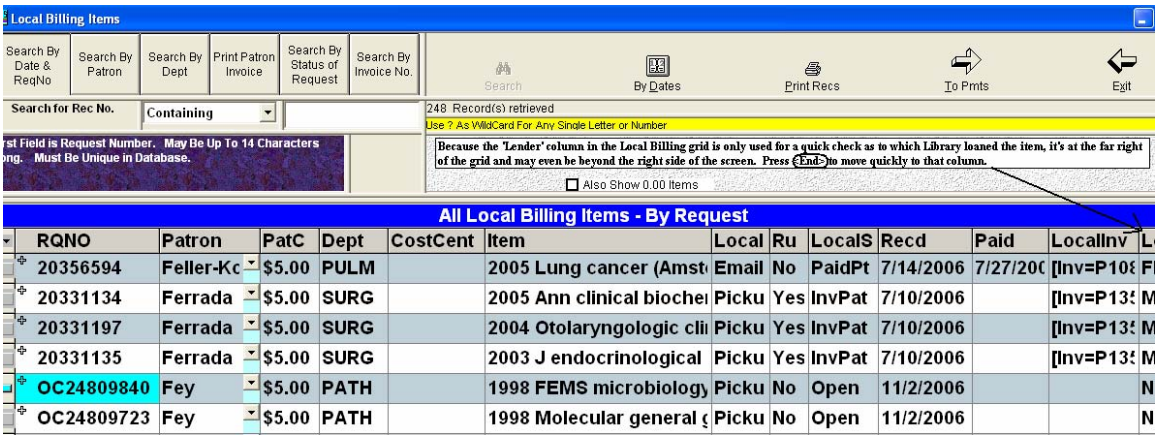
Local Billing Grid

Lender Column Added at far right of grid

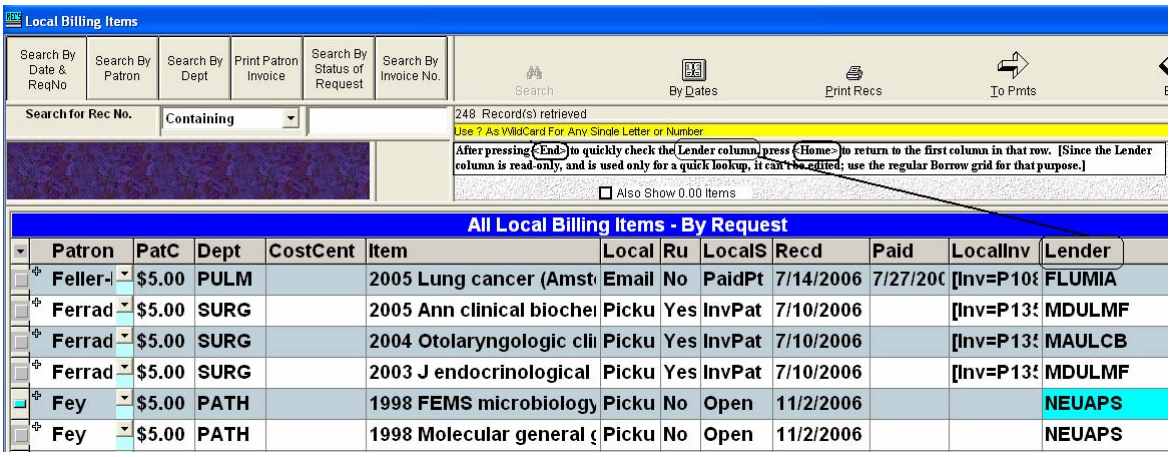
Version 2.1.8 adds a new column at the far right of the Local Billing Grid to show the **Lending Library** of the item. In most cases, knowing the Lender isn't important in Local Billing, since the Local Billing charges are computed separately when the item is received. There are cases, though, when it might be useful to know who the Lender was when you're editing in the Local Billing Grid, so the new Lender column appears at the far right:



Because the Lender column appears last, it will probably be truncated or off screen entirely in most cases. Since it won't be consulted all that often, this setup won't be a problem in most cases:

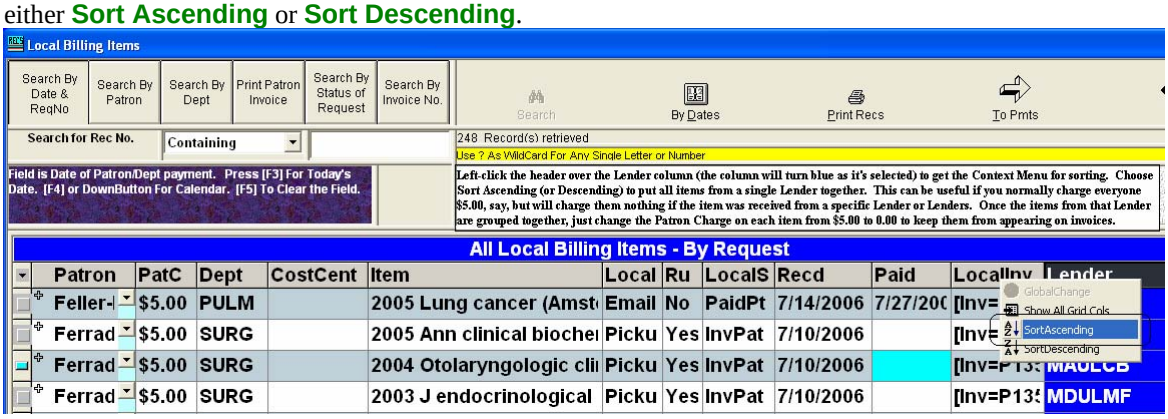


In the case above you can just barely make out the L for Lender in the header of that column. When you need to check the Lender value, just click into that row (as in the OC24809840 RQNO cell above) and press the **End key**.



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.

The column can be **sorted**, however, 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**.



OCLC Import Function

Version 2.1.8 includes 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;

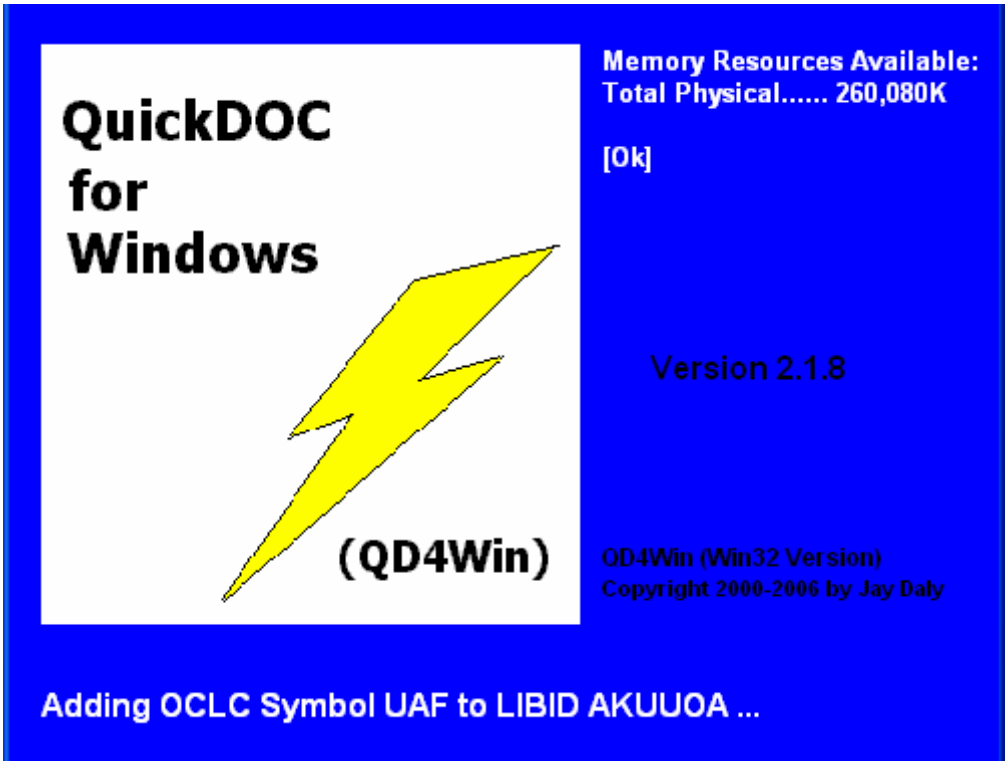
b. The **Article Author** and **Article Title** fields are both contained in the **OCLC Article (Citation) field**, separated by a colon, a single quote, or some other character. If we can standardize on the **colon** as our separator for Borrows, and encourage those who borrow from us to do the same, 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 Symbols File Import

The first time you start up QuickDOC after upgrading to 2.1.8 you'll see the tblLibs Table in QuickDOC.MDB being updated with a selection of OCLC symbols.



This process imports a representative list of about 1,000 OCLC symbols matched with LIBIDs in the NLM Institutions database found on DOCLINE. QuickDOC will only add the symbol if there isn't already one there, and it won't alter any made up records that you've created.

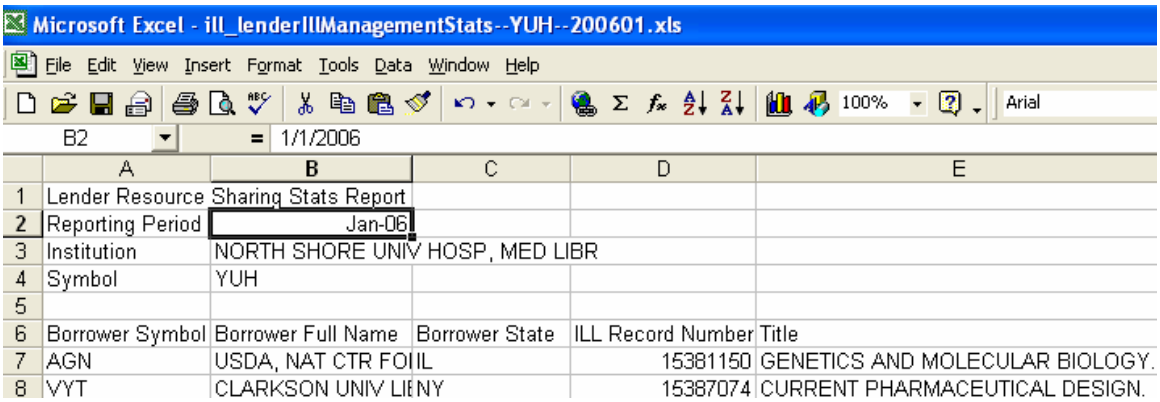
On the other hand, if you've made up a LIBID to match an OCLC symbol and it turns out that there is a real NLM record for that OCLC symbol, you may notice that requests are assigned to the NLM LIBID if that LIBID comes first, alphabetically. If this happens, just merge your made-up record with the true NLM symbol (recommended, although you could always merge the other way as well).

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.

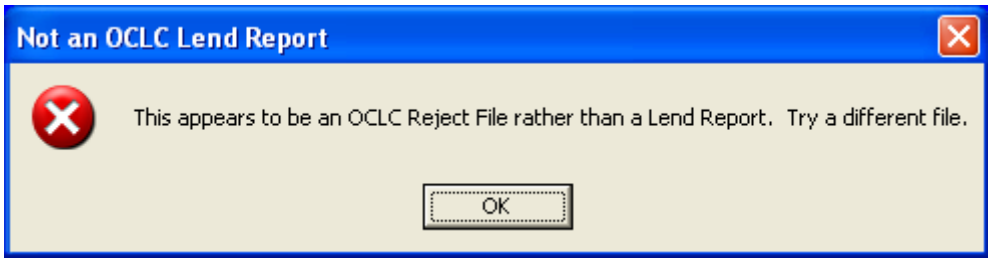
Lender Resource Sharing Stats Report

On the Lend side, we use the **OCLC Lender Resource Sharing Stats Report**, which begins as shown below:



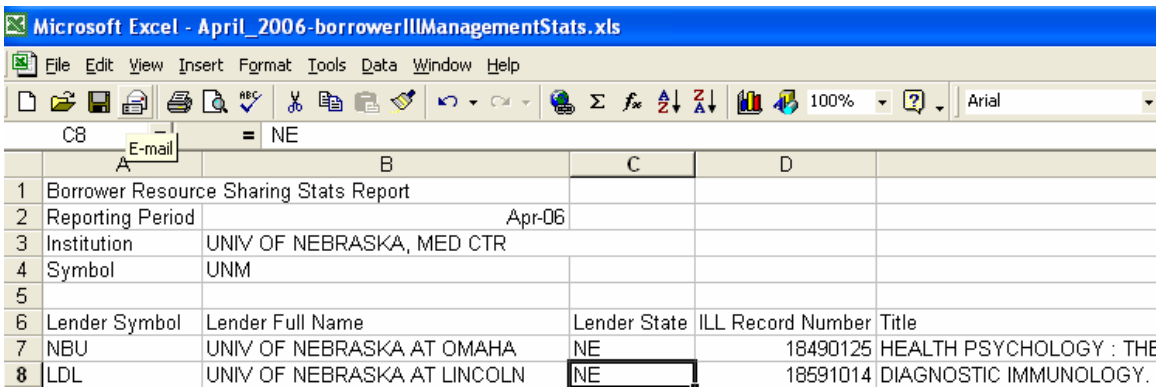
	A	B	C	D	E
1	Lender Resource	Sharing Stats Report			
2	Reporting Period	Jan-06			
3	Institution	NORTH SHORE UNIV HOSP, MED LIBR			
4	Symbol	YUH			
5					
6	Borrower Symbol	Borrower Full Name	Borrower State	ILL Record Number	Title
7	AGN	USDA, NAT CTR FO	IL	15381150	GENETICS AND MOLECULAR BIOLOGY.
8	VYT	CLARKSON UNIV LI	NY	15387074	CURRENT PHARMACEUTICAL DESIGN.

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:



	A	B	C	D	
1	Borrower Resource	Sharing Stats Report			
2	Reporting Period	Apr-06			
3	Institution	UNIV OF NEBRASKA, MED CTR			
4	Symbol	UNM			
5					
6	Lender Symbol	Lender Full Name	Lender State	ILL Record Number	Title
7	NBU	UNIV OF NEBRASKA AT OMAHA	NE	18490125	HEALTH PSYCHOLOGY : THE
8	LDL	UNIV OF NEBRASKA AT LINCOLN	NE	18591014	DIAGNOSTIC IMMUNOLOGY.

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.

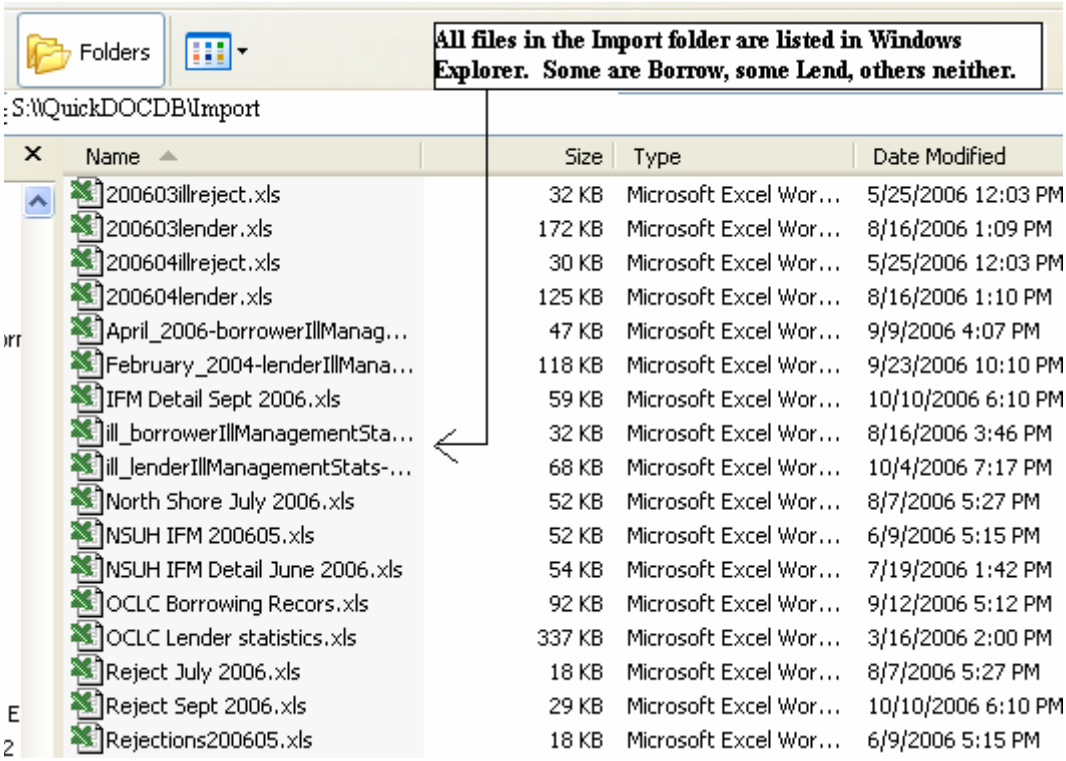
Machine running the Import must have Excel installed

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 Access 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:



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).

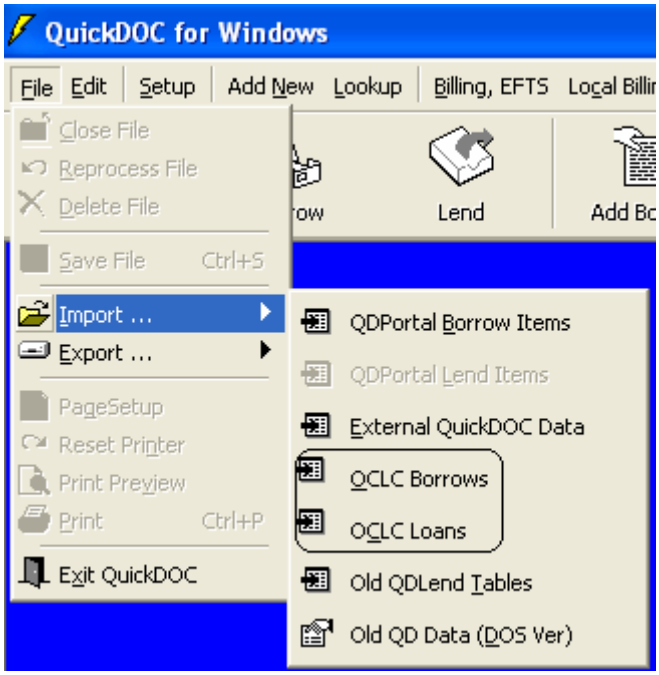
In saving this file to the QuickDOCDB\Import folder, it's probably smarter to truncate it to:

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.

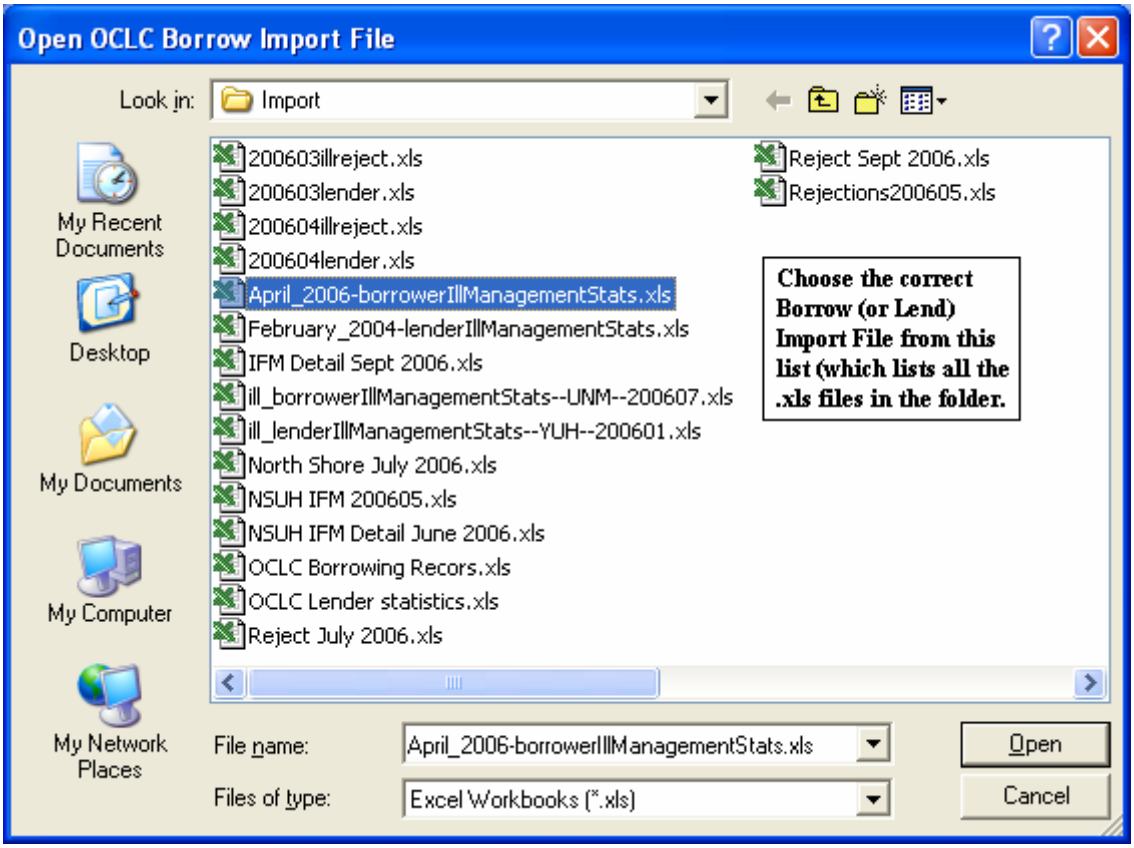
Performing OCLC Imports

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.

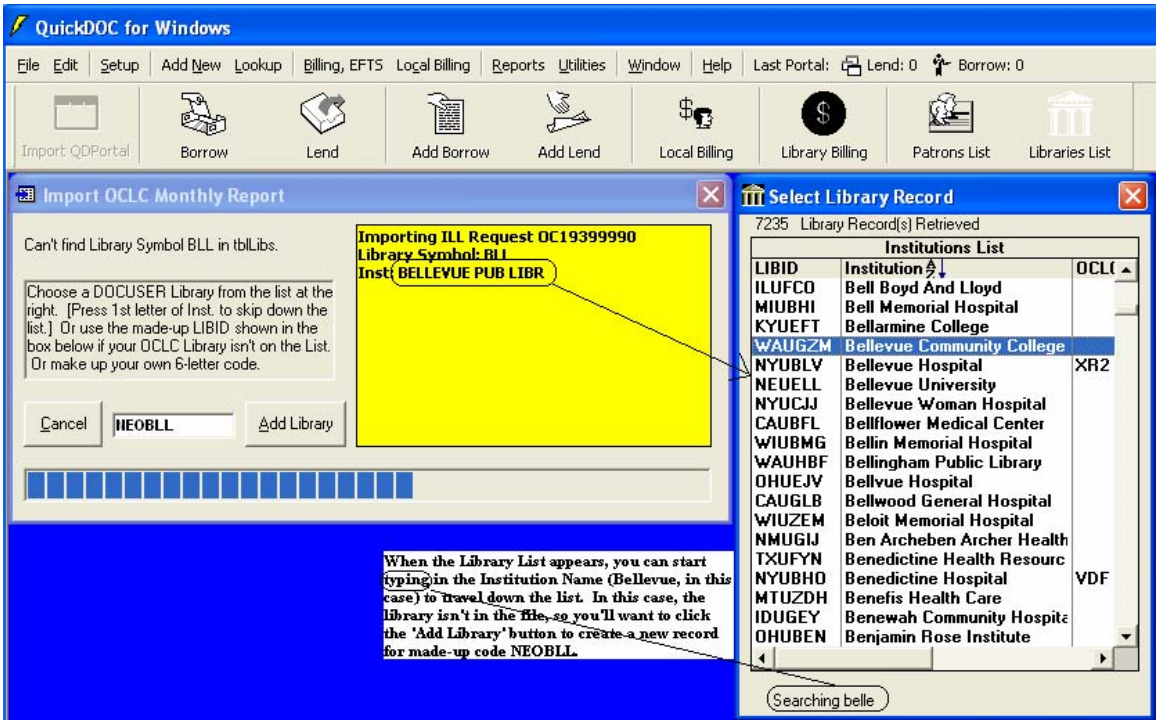
OCLC Lend Imports

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.

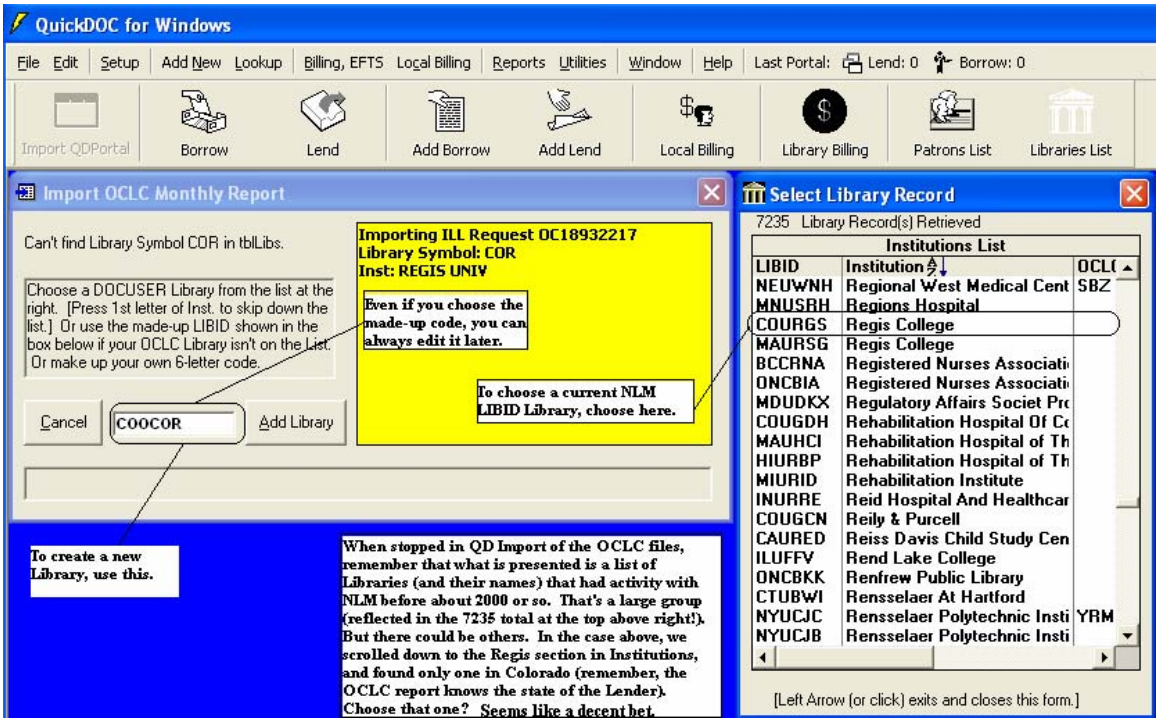
In the case above, there isn't a record in the NLM database (though, don't forget, it was created back in 2000, so conceivably the Library could have been added in 2001!) for the Bellevue Public Library. So we'll want to create one. QuickDOC suggests **NEOBL**L, which is a composite of the **State** (**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**:



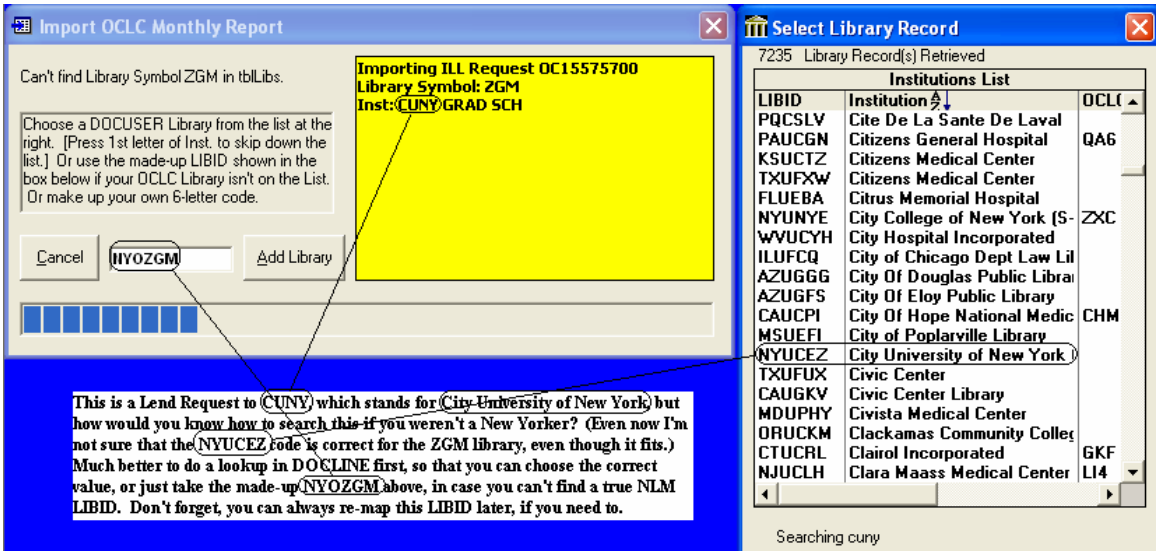
You could go with either one here, I would think. Turns out that **Regis College** in the list is now **Regis University**, so the **COURGS LIBID is correct**. But it would be hard to fault someone for choosing the new **OCLC version (COOCOR**) of the LIBID. There's a brief discussion below on more advanced 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.

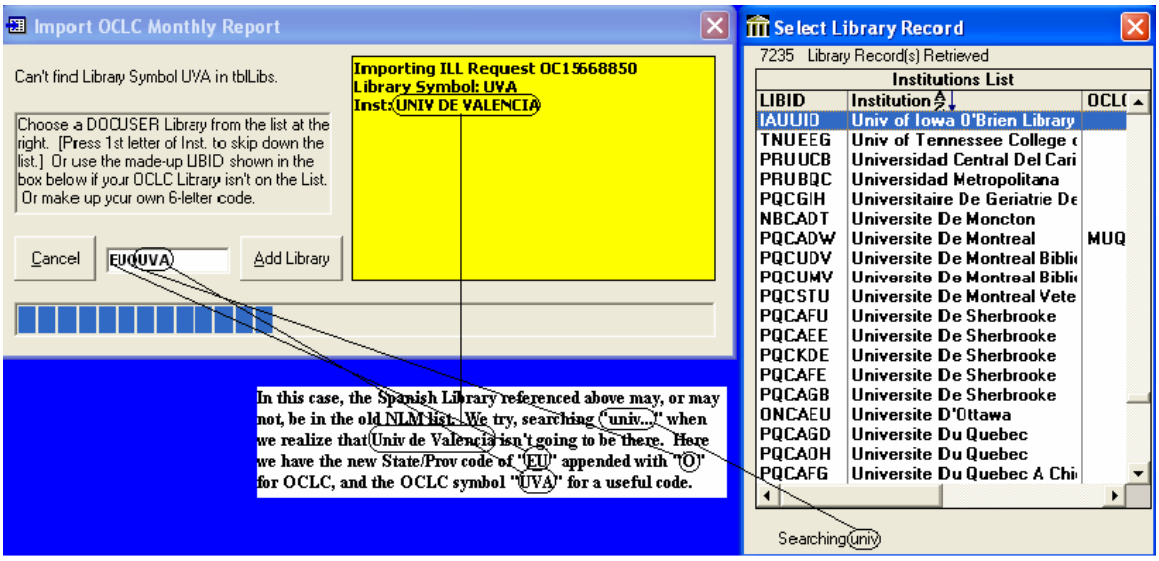
Foreign Library OCLC Records.

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.

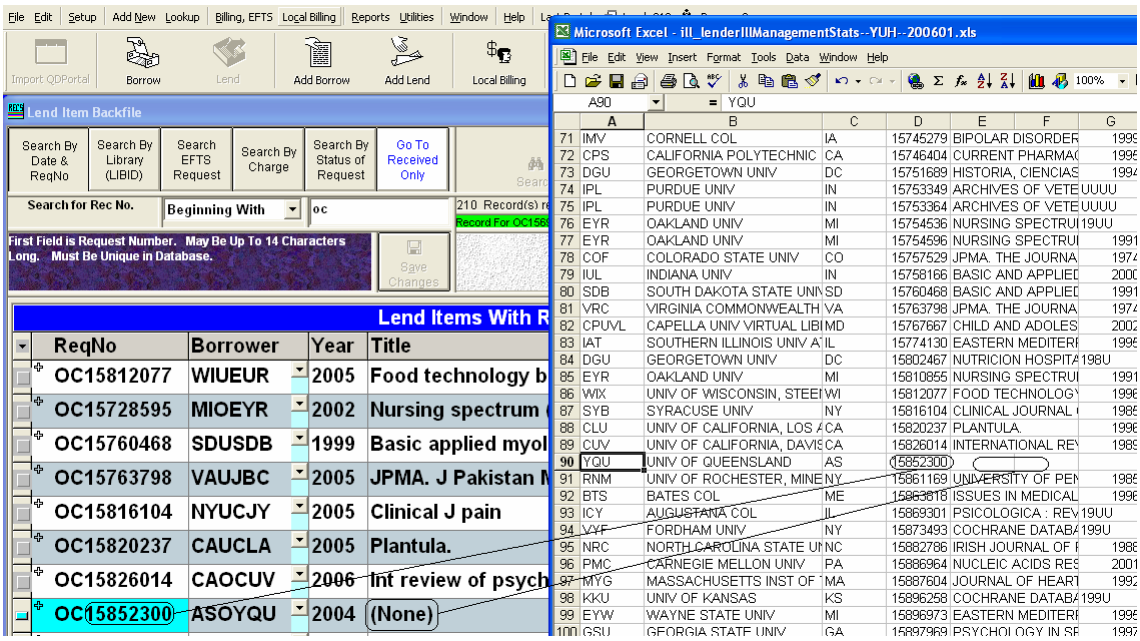
Final Rules for Constructing Library OCLC Records

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.

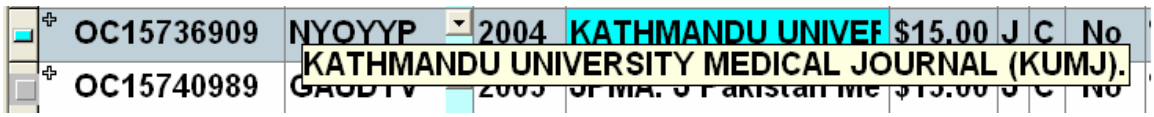
First of all, the Import process will **ALWAYS** have some defects. The easiest to check is the **Journal Title. (None)** is an obvious red flag (although it's usually correct: the Borrower has not completed that field---for whatever reason).



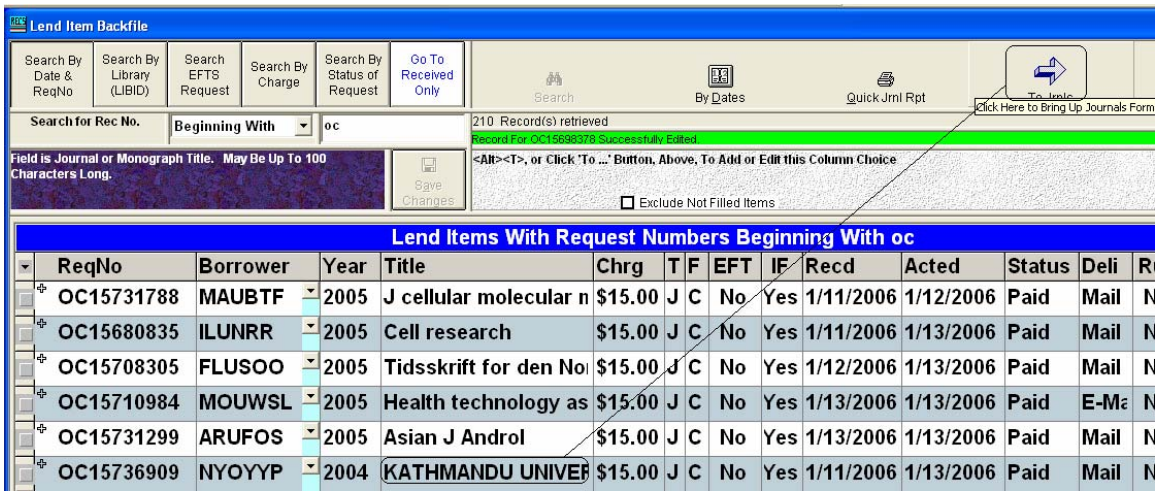
As you can see here, QuickDOC Import has failed to identify the Journal Title, but with fairly good reason: there wasn't one in the report. Perhaps it was stored in some other field? In any event, all you can do here is to check any original documentation and then edit the record appropriately.

Lend Journal Title Not Found (in CAPS)

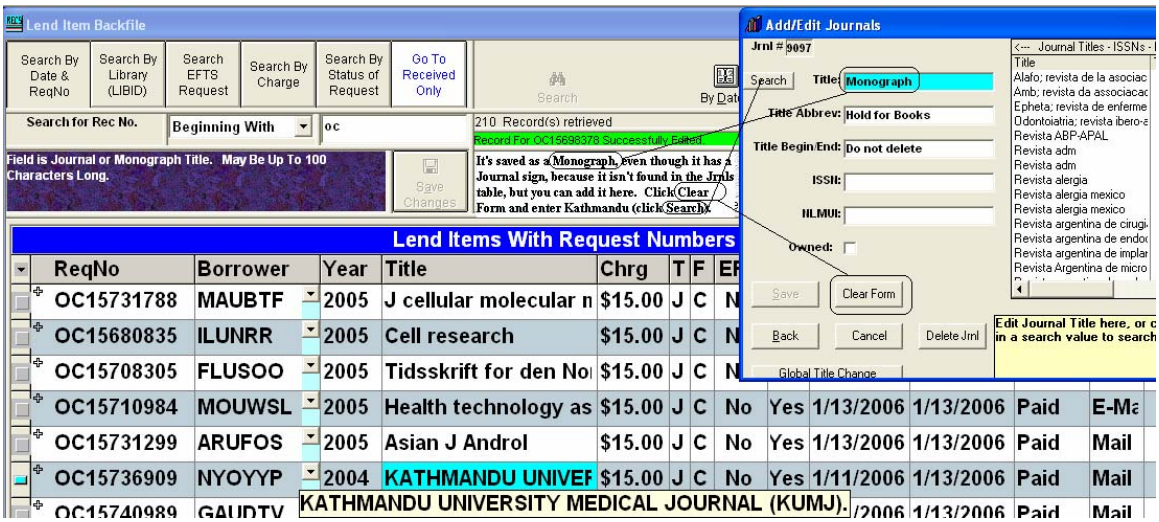
More likely, as you do your review after importing, you'll notice that some Journal Titles appear in CAPS, rather than their usual formats. This makes them very easy to pick out.



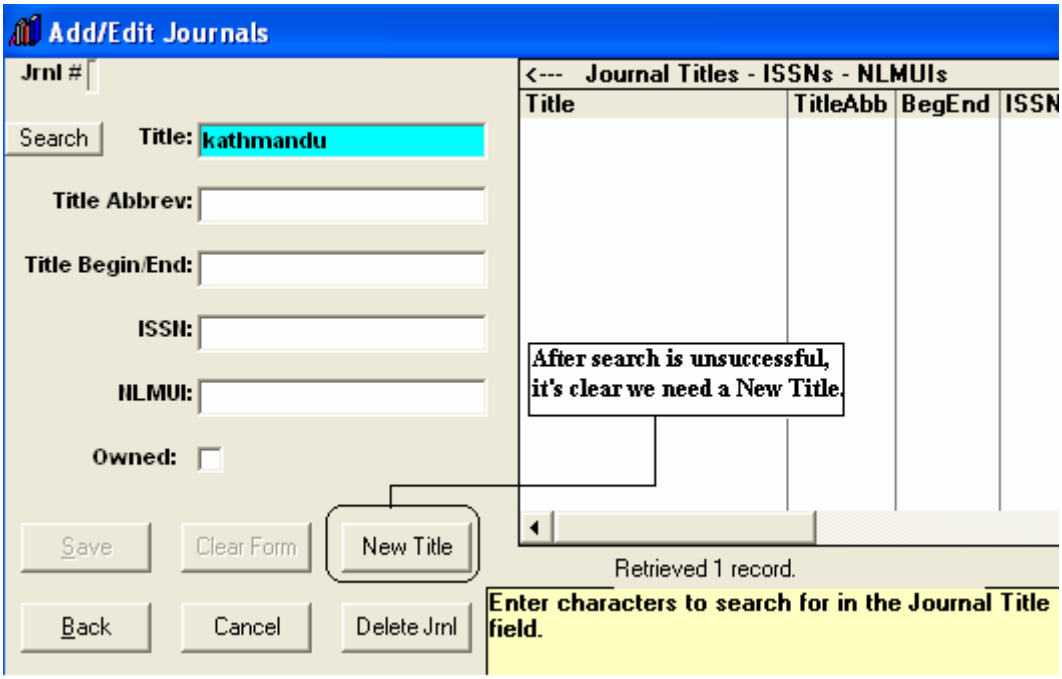
Holding the cursor over the Title cell will show the complete entry in a cell tip, as above. Sure looks like a journal from here. We may need to add it to the tblJrnls Table in QuickDOC.MDB. First check what's there. If we're in the Title cell (which will show an azure background if we are, as it does 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).

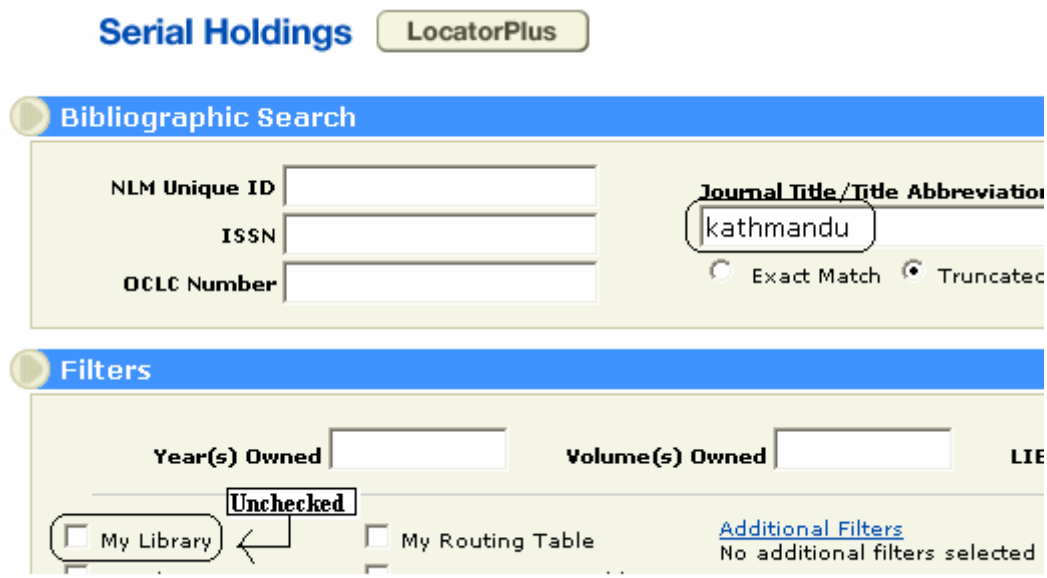


To make the change, click **Clear Form**, then type in Kathmandu in the Title box and click Search. Nothing. Clear the form again, just to be sure, in preparation for adding this title.

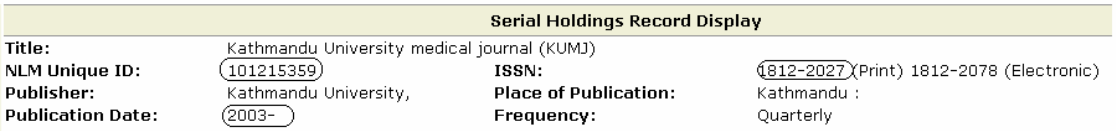


Click the **New Title button** to prepare for data entry. First we'll need accurate info on the Journal, itself. It's not there in the OCLC Report (the fact that it's in CAPS means that no ISSN existed), so try using QDPortal to check the Serials file in DOCLINE. You can open a copy of QDPortal while QuickDOC waits here, in the background, if QDPortal isn't already open.

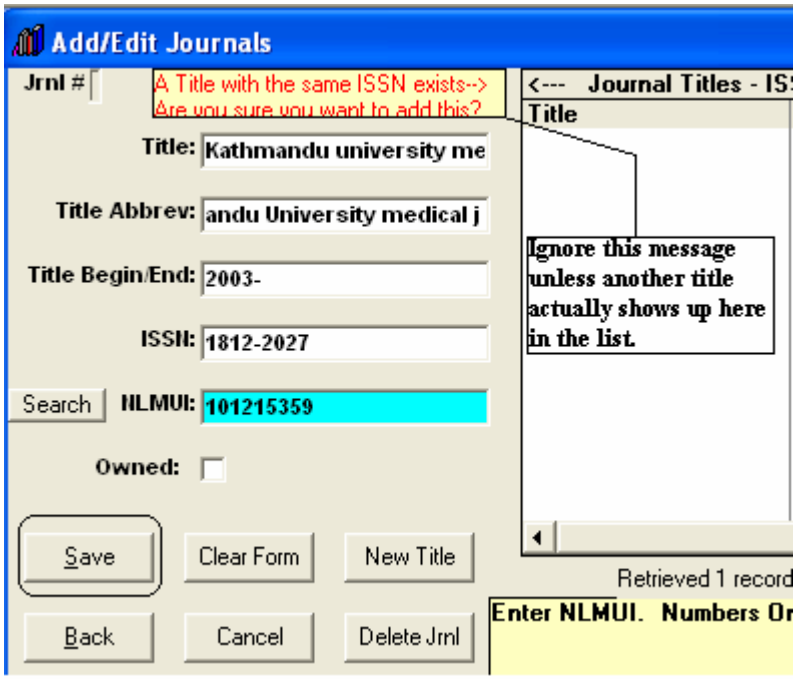
Here's what we enter into the **Serial Holdings Search form**:



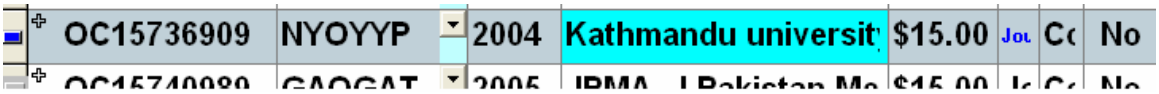
The result is we get the info, with NLMUI, ISSN and general dates:



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:



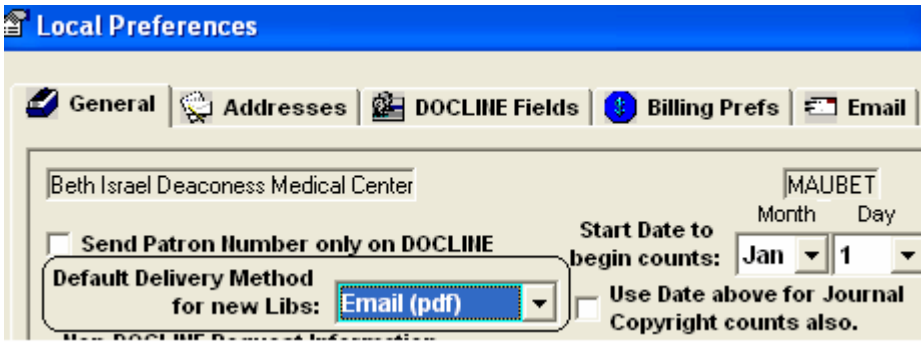
Just click into the next row to save them.

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:

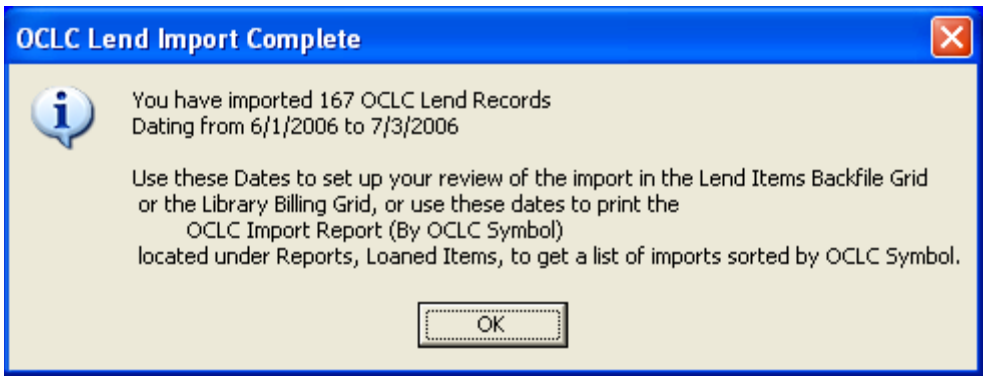


It will default the first time to Email (pdf), but you can change it to anything on the list. From that point on, any new library created will be assigned the default preferred delivery method.

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.



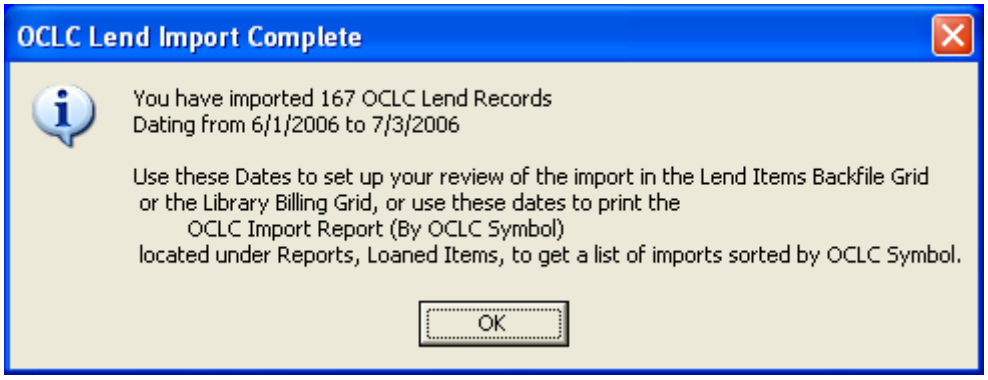
In the case above, you'd set your **Beginning Date** to 6/1/2006 and **End Date** to 7/3/2006 in the Lend Item Backfile to search requests **beginning with OC**.

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):

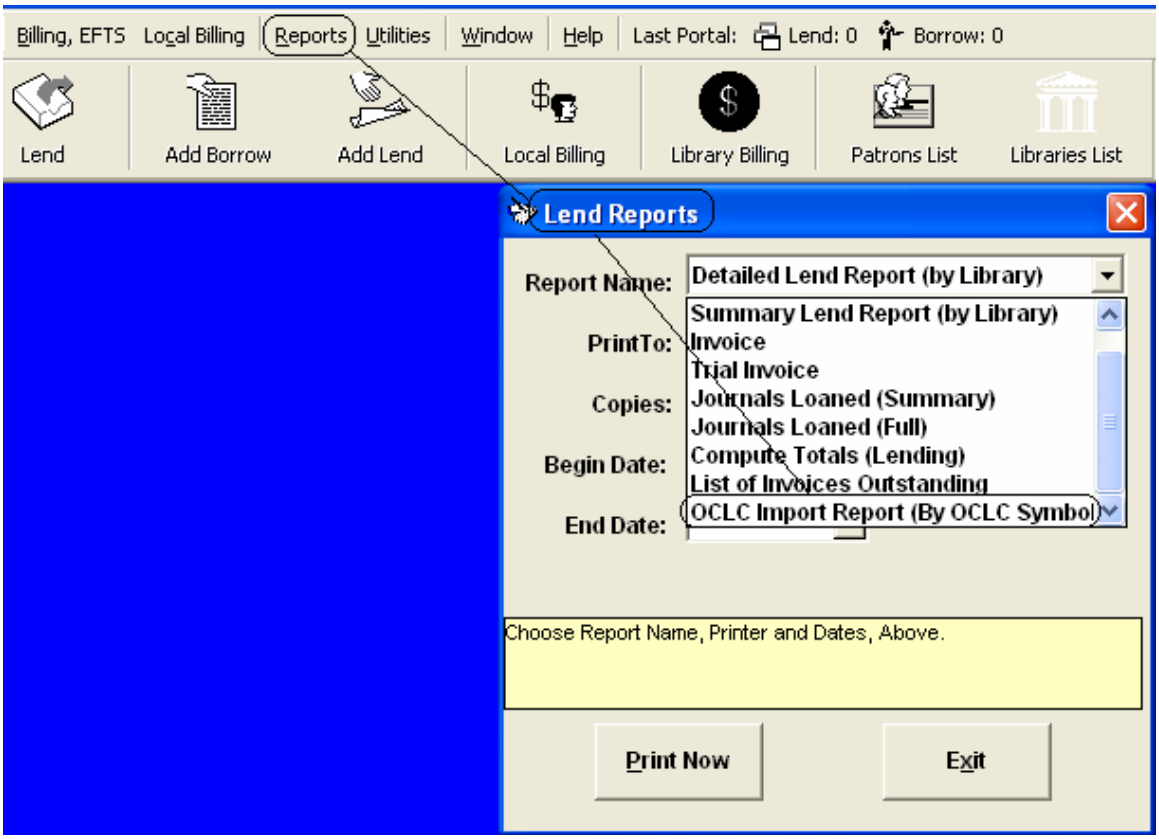
OCLC Import Report (By OCLC Symbol)

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	0.711111111111111():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**.

NewOCLib.txt - Notepad

File Edit Format View Help

```
Wednesday, November 15, 2006   Report of New Libraries Created in OCLC Import
ILL Number -- OCLC -- LIBID -- Date       -- State -- Institution
OC23578339 -- KCJ -- KSOKCJ -- 10/03/2006 -- KS -- Johnson Cnty Commun
OC23691756 -- BET -- MAOBET -- 10/03/2006 -- MA -- Bentley Col
OC23696875 -- AKR -- OHUEJI -- 10/02/2006 -- OH -- Univ Of Akron
OC23700572 -- BYU -- HIOBYU -- 10/03/2006 -- HI -- Brigham Young Univ,
OC23744676 -- VAQ -- VAUVYS -- 10/05/2006 -- VA -- Shenandoah Universit
OC23818102 -- PSF -- PAUPAQ -- 10/05/2006 -- PA -- Saint Francis Univ,
OC23843622 -- YHM -- NYUCKA -- 10/05/2006 -- NY -- Hamilton College
OC23846678 -- TPA -- TNOTPA -- 10/05/2006 -- TN -- Austin Peay State Un
OC23846848 -- NGU -- NCONGU -- 10/11/2006 -- NC -- Univ Of N Carolina,
OC23848898 -- ZWU -- NYUCJI -- 10/05/2006 -- NY -- Union College
OC23908360 -- CAP -- CAOCAP -- 10/12/2006 -- CA -- Azusa Pacific Univ
OC23966615 -- SNN -- MAUBQK -- 10/09/2006 -- MA -- Smith College
OC24030891 -- L2U -- EUOL2U -- 10/23/2006 -- (None) -- Universiteit Leiden
OC24072207 -- MB@ -- CAOMB@ -- 10/17/2006 -- CA -- California State Uni
OC24108418 -- IOW -- IAOIOW -- 10/13/2006 -- IA -- Wartburg Col
OC24158844 -- VZS -- NYUCJP -- 10/16/2006 -- NY -- Skidmore College
OC24159368 -- CCO -- CAOCCO -- 10/17/2006 -- CA -- Occidental Col Libr
OC24187147 -- ASH -- ALOASH -- 10/17/2006 -- AL -- Spring Hill Col
OC24203678 -- REC -- PAUCNG -- 10/17/2006 -- PA -- Clarion University o
OC24227979 -- RNJ -- NJUBYI -- 10/17/2006 -- NJ -- Ramapo College of Ne
OC24265315 -- ISM -- TXOISM -- 10/18/2006 -- TX -- Southern Methodist U
OC24272787 -- COD -- COUDZB -- 10/20/2006 -- CO -- Univ Of Colorado At
OC24286707 -- UIU -- ILOUIU -- 10/18/2006 -- IL -- Univ Of Illinois
OC24287167 -- VKC -- NYUBNE -- 10/23/2006 -- NY -- Canisius College
OC24296223 -- OAG -- OHOOAG -- 10/24/2006 -- OH -- Ohio Agr R&d Ctr
OC24308155 -- IOZ -- IAUIAL -- 10/24/2006 -- IA -- State Library of Iow
OC24319409 -- IYU -- TXOIYU -- 10/19/2006 -- TX -- Baylor Univ
OC24382071 -- ZWC -- NYOZWC -- 10/20/2006 -- NY -- Wagner Col
OC24438643 -- ITD -- TXOITD -- 10/24/2006 -- TX -- Univ Of Texas At Dal
OC24449277 -- LQS -- PAUKNL -- 10/24/2006 -- PA -- Lock Haven Universit
OC24454261 -- CPO -- CAOCPO -- 10/24/2006 -- CA -- California State Pol
OC24509741 -- UUS -- UTUUSL -- 10/25/2006 -- UT -- Utah State Universit
OC24550868 -- WWS -- MDOWWS -- 10/30/2006 -- MD -- Washington Col, Mill
OC24579968 -- ICV -- ILOICV -- 10/30/2006 -- IL -- Elmhurst Col
OC24589355 -- ZSJ -- NYOZSJ -- 10/27/2006 -- NY -- Saint Johns Univ Lib
```

A newly-created OCLC Library.

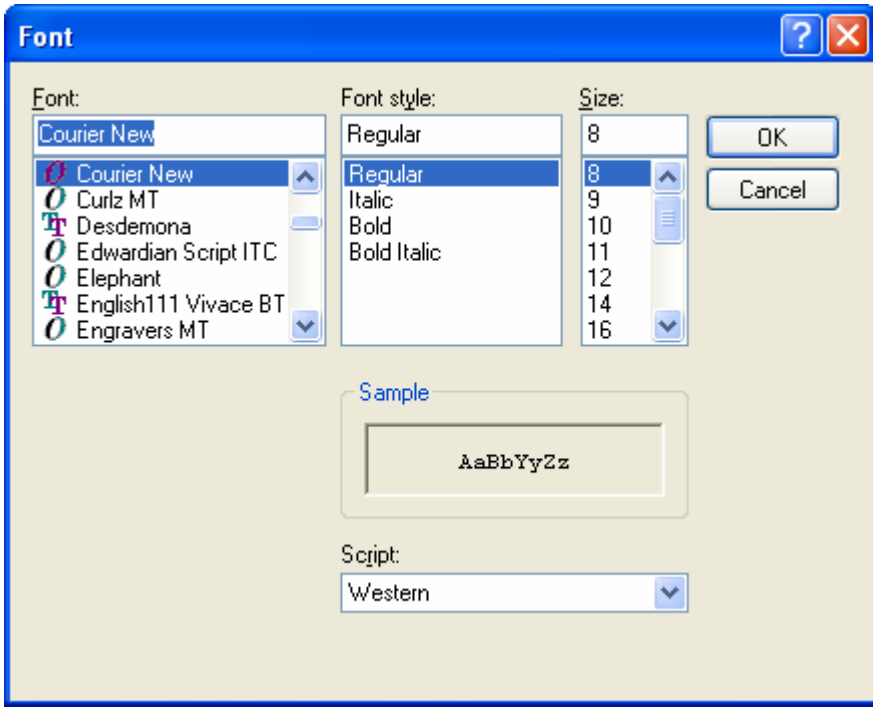
A new Library based on a real LIBID.

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:

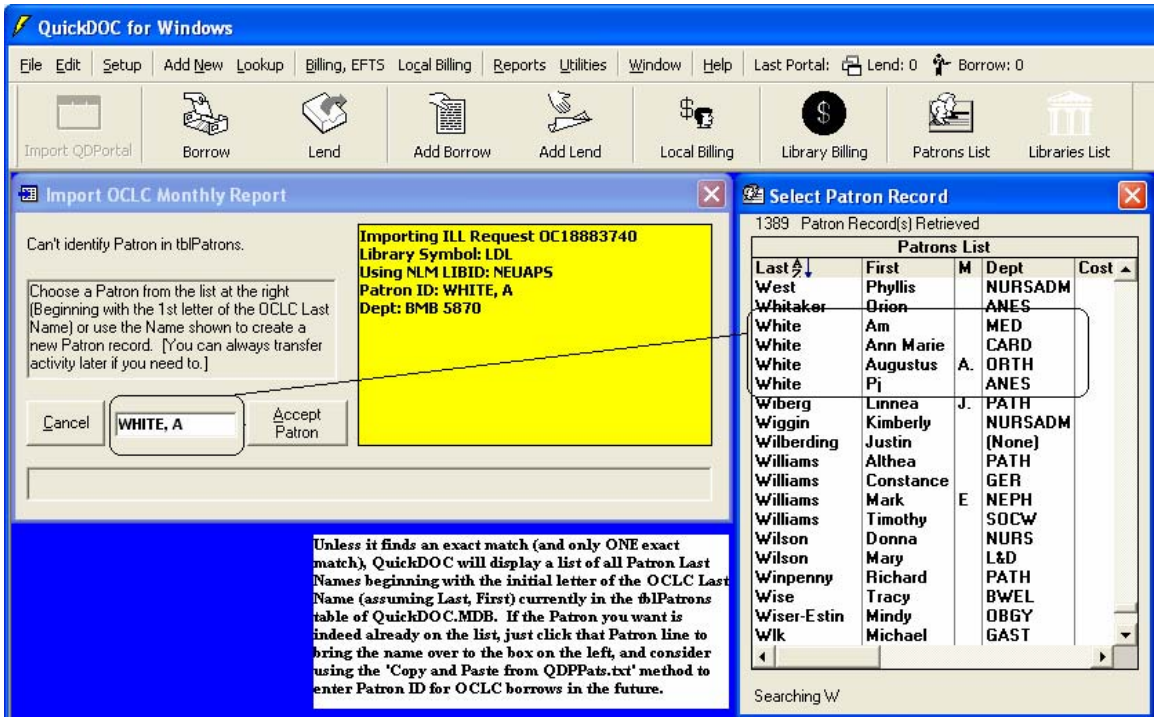
1. The **text of the request** so far, in the yellow box in the middle of the form;
2. A **suggested OCLC LIBID** in a text box at the left; and
3. A list of 7235 **DOCLINE Libraries**, sorted by Institution.

The process is pretty much the same as that described in Lend, above.

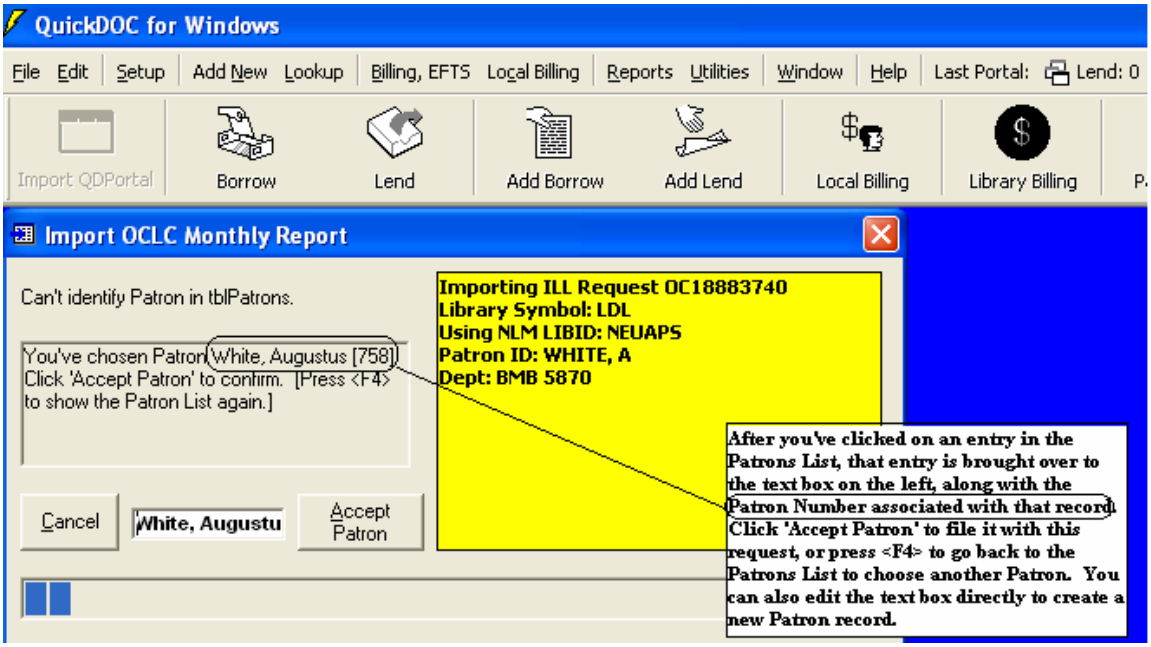
Patron Importing

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.

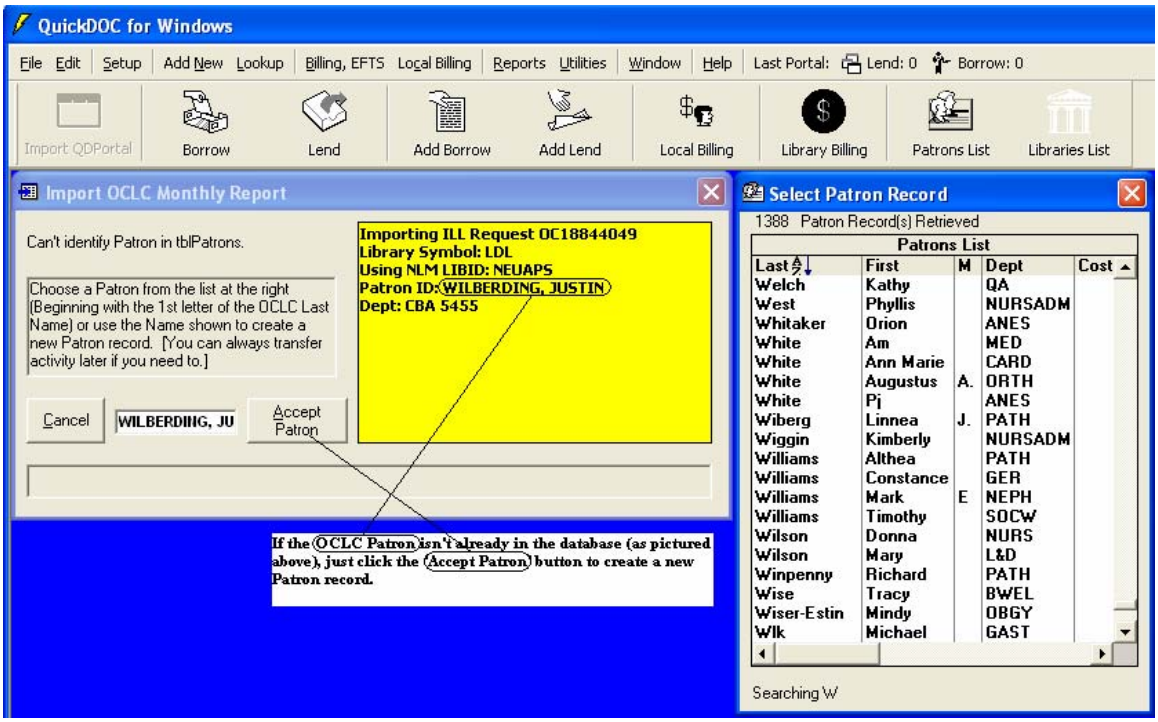


Assuming we want to assign this request to Augustus White, you would **double-click** (not just click, as the box above states) his line to bring his information over to the **Accept Patron Box** on the left.



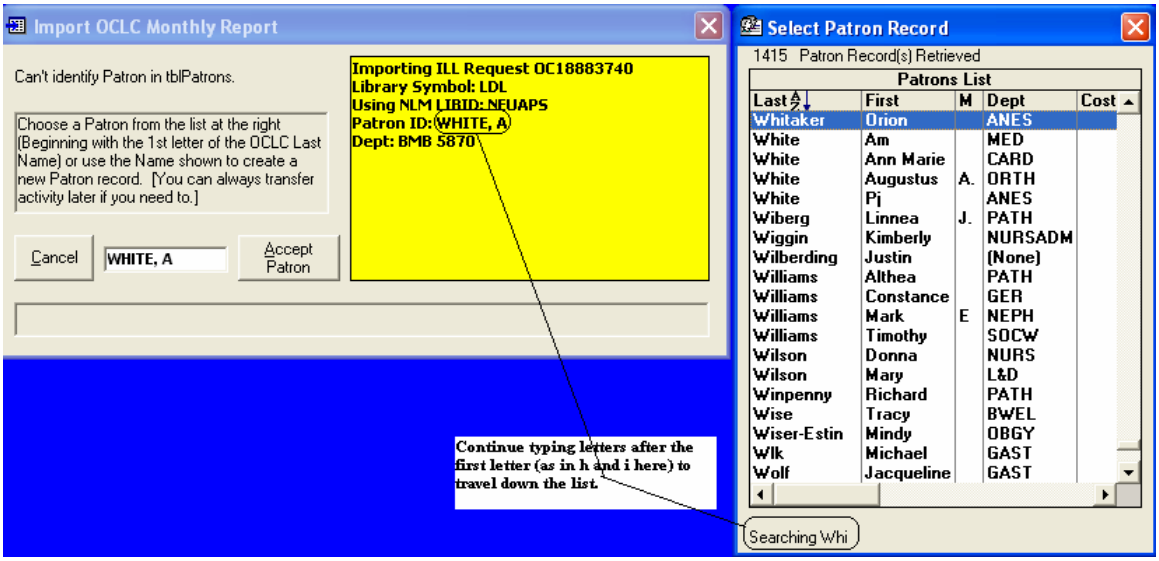
At this point you'll see the Patron's real name in the box (it's also appended with the [758], although you can't tell by looking, which is why it's shown in the information space just above the box). Click the **Accept Patron button** to move on.

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.



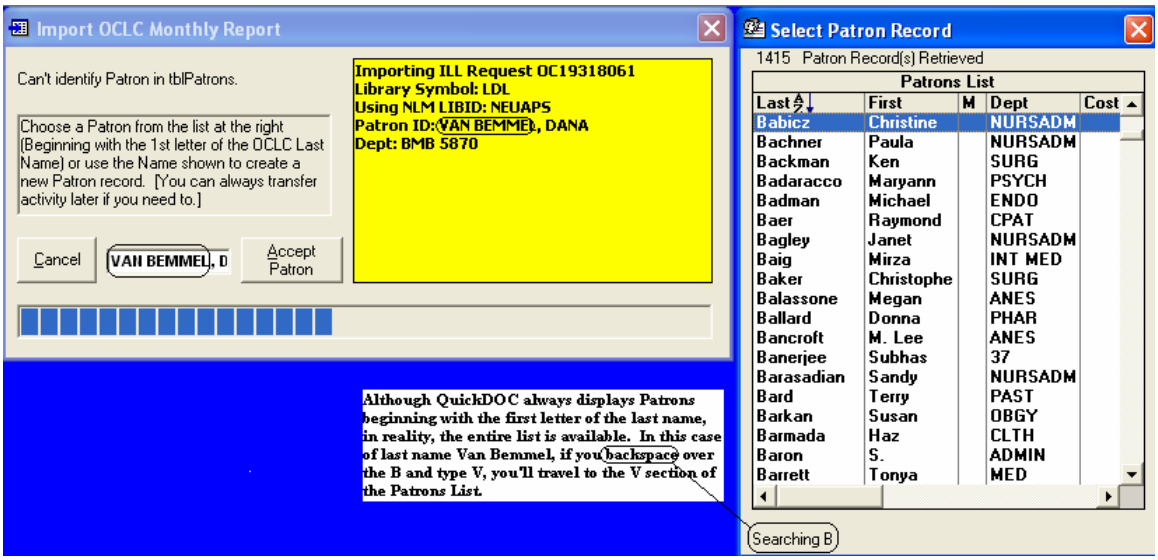
In the case above, there's no need to search further, since it's apparent that this patron isn't on the list. Just click Accept Patron to add him to the Patrons Table.

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.

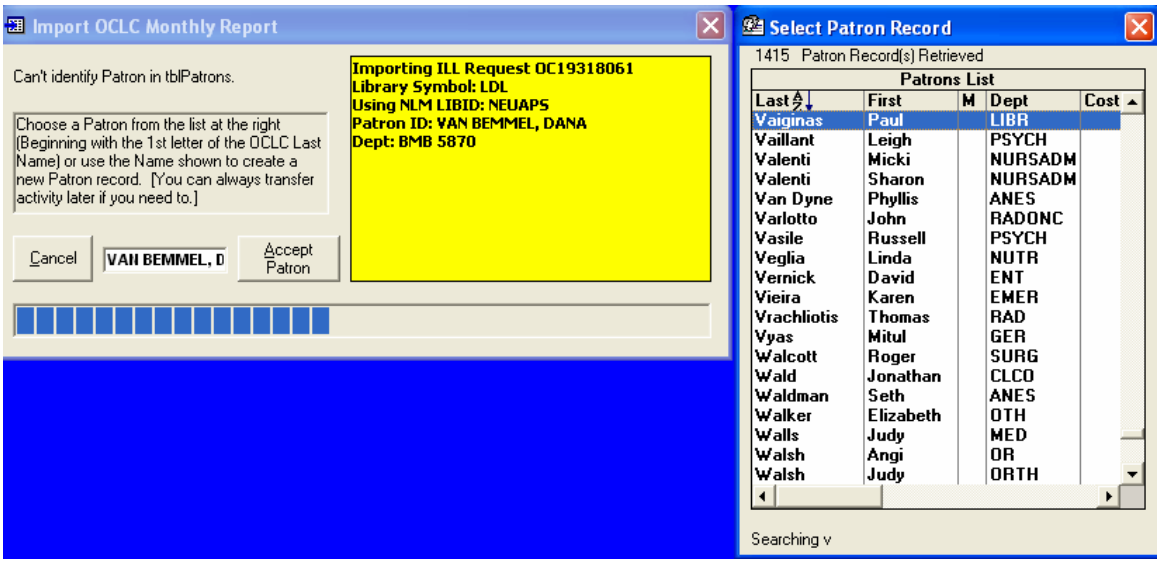


Don't forget that the **first letter will already be in there**! If you do, you'll find yourself searching **WW** instead of **WH**. If you do make a mistake, just press **Backspace** to return to the original search string. In fact, if you backspace to clear the string entirely, you'll get access to 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.



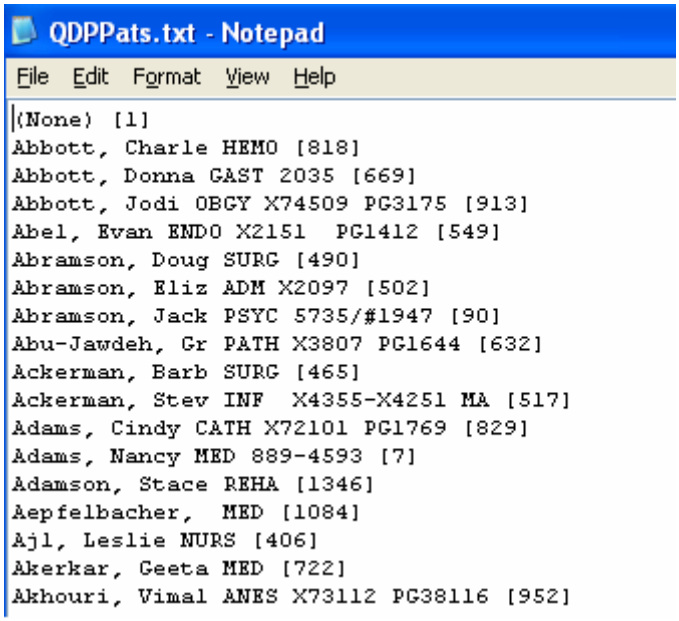
If you want to search V instead of B (as you should), just backspace over the B and type in V.



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 <u>either</u> 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).

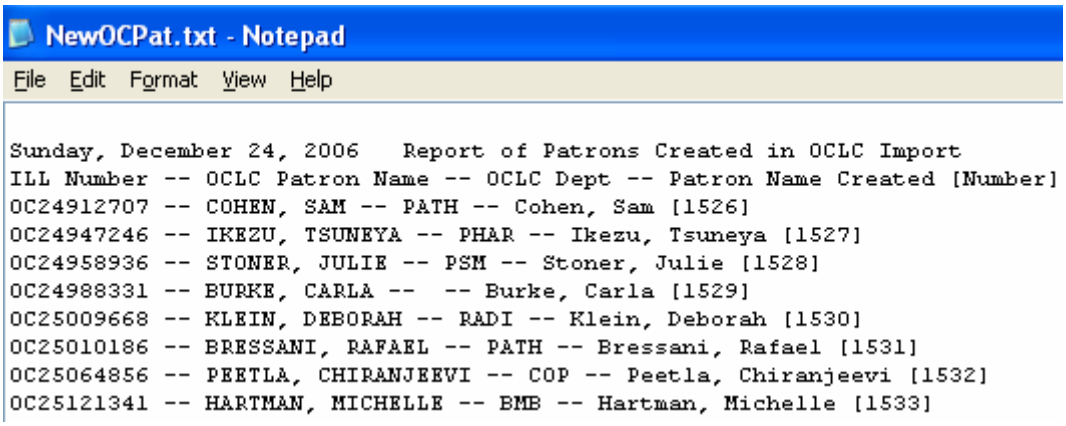
Patron Dept (None)

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:



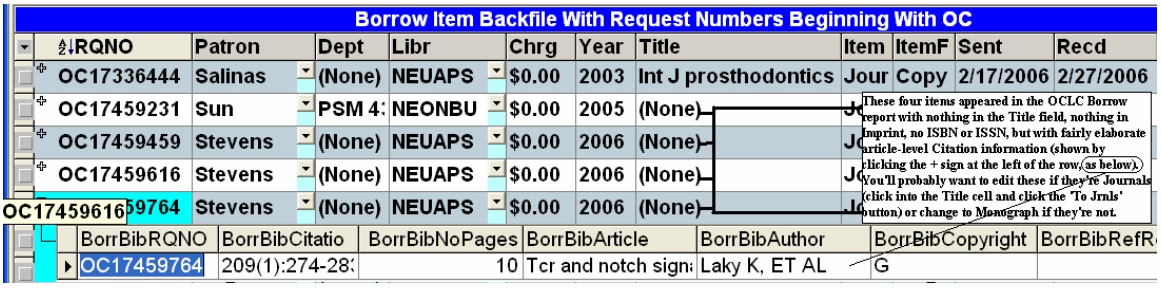
listing Request Number, Name as reported in the report (usually CAPS), Dept in Report, Name as added to tblPatrons in QuickDOC.MDB, and Patron Number in that database.

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-K	(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	2/2(

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

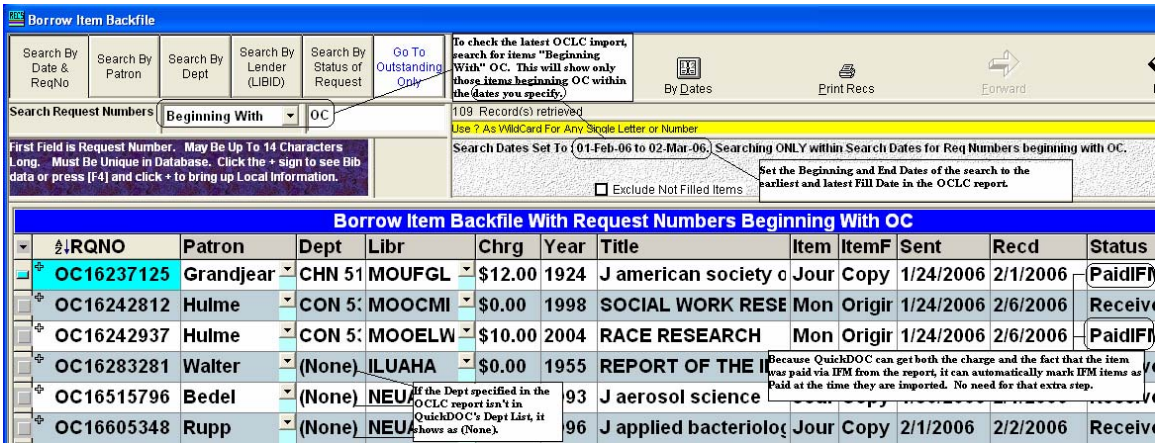
Clearly, these should be avoided, if at all possible.

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.



I'll be adding to this file as we move through and out of beta.

Reports

New Quick Report for All Monographs Borrowed

New in 2.1.8 is a report that will display a list of Monographs Borrowed since the beginning of the year. To display this report, 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**

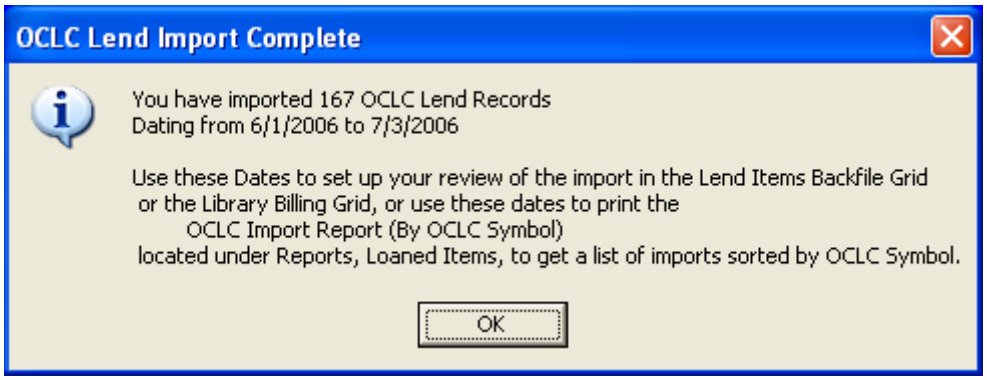
Journal#	# Borrowed	Lender	Year	Jrnl Title	Patron
1	1	NEONBU	2000	ADAPTIVE TECHNOLOGY FOR THE INTERNET	Magee, Marty
	2	NEUAPS	1992	ADMINISTRATION OF THE SMALL PUBLIC LIBRA	Magee, Marty
	3	MDUNLM	1981	ANAESTHESIOLOGY: PROCEEDINGS OF THE 7TH	Marshall, Kenneth
	4	NEUAPS	2005	DATA MINING IN BIOINFORMATICS /	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.

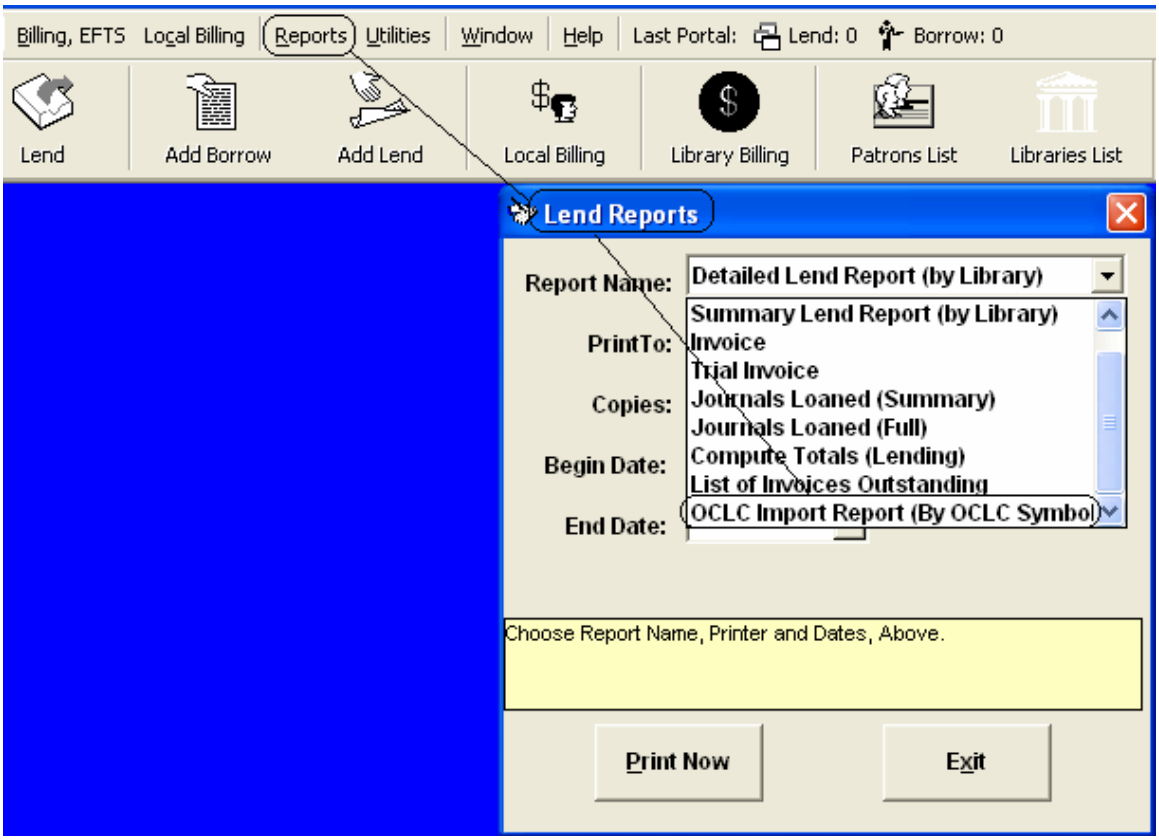
OCLC Import Report (By OCLC Symbol)

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.

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	0.711111111111111():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**

Jay 3/2/2007