

clio

powerful, flexible, affordable ILL solutions

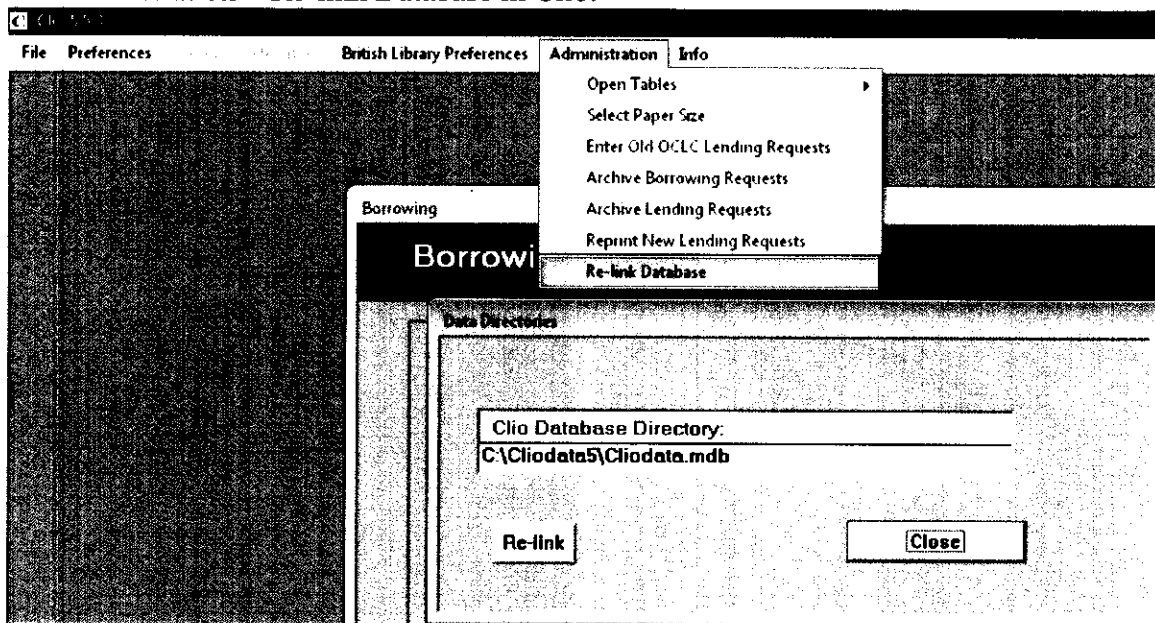
Notes on the Pre-Workshop at the TexShare Interlibrary Loan Workshop Conference

Introduction

In this document, I am going to describe steps that you can take to improve your use of Clio and the statistical reports that Clio offers. When you use Clio, you are using it to perform your day-to-day operations and to keep tabs on the material that you are receiving and shipping to other institutions. You are also using Clio to provide you with statistics on your ILL office's performance and information that will help your administration with determining collection and staffing needs. In order to reach these goals, your database needs to be backed up frequently, and records need to be updated properly and kept current. You will also need to perform a compact and repair on your database on a regularly scheduled basis.

Backing up your Cliodata.mdb file

In order to keep a reliable backup of your data, you will need to make a backup of your Cliodata.mdb file. The Cliodata.mdb file is the database file that stores your data. If you do not know the location of your Cliodata.mdb file, then this can be ascertained by going to Administration > Re-link Database in Clio.



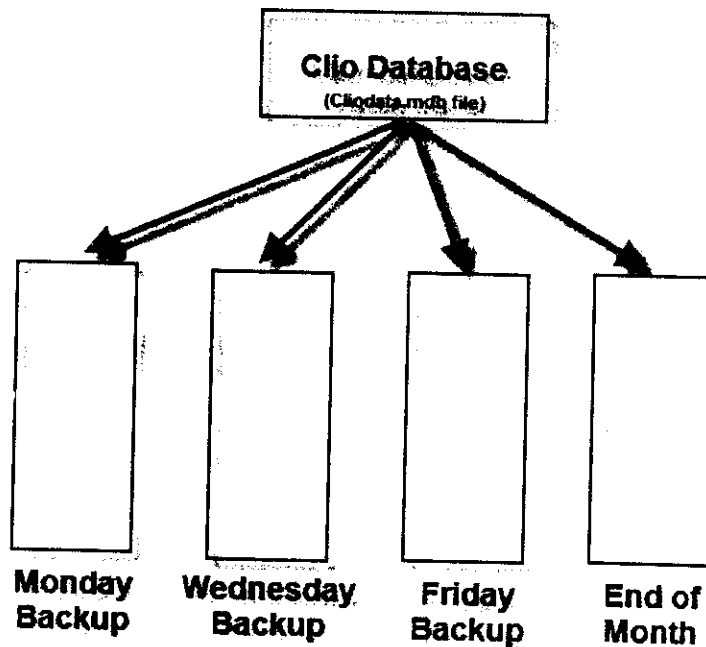
The path to the file will be displayed on the Database Directories window. If your Clio database is already stored on a network drive, the file might already be part of a backup regimen. You need to check with your IT staff to see if the file is backed up regularly, preferably daily using an incremental backup routine. If you do not store your database on a network drive that is backed up routinely, then you will need to create a backup routine on your own. The backup of your database file needs to be stored in a different

location than your active database location. You can place it on an external hard drive and then use backup software that will provide you with incremental backup options. Another option is storing the Clidata.mdb file on a flash drive and then putting the flash drive in a safe place. Flash drives have been proven to be extremely reliable due to their lack of movable parts.

Example of a Flash Drive



You can find flash drives that can hold multiple gigabytes; large enough to store multiple copies of the database. When backing up your database, I recommend that you maintain several backups of the database; a backup created three times a week and a monthly one. You can place each backup in a folder that you have created corresponding to the day of the backup.



For example, I would make backups on Monday, Wednesday, and Friday. On Monday, the backup will be placed in a folder labeled Monday Backup, and then on the next Monday the existing backup in the Monday Backup folder would be replaced by the present Monday file. The reason for keeping multiple backups is to provide you with a better chance of recovering from a catastrophic loss of your file. Sometimes issues with a database file are not noticed prior to a backup, and then the need to fall back to an older backup is needed.

One other item that you may need to backup if you are using ClioRequest is the requestdata.mdb file. The Requestdata.mdb file stores your settings for ClioRequest. The file is located in the C:\Program Files\ClioRequest\ folder. If you ever need to install or reinstall ClioRequest on a new or old machine, you can use the backup to replace the default file that is generated on a new installation of Clio.

Maintenance of the internal status of Requests

Besides following updating steps outlined in the Getting Started document that Clio provides to new Clio customers, you will need to make sure that your requests get a “complete” status in the internal status field (local status). The internal status field is one of the fields used by Clio’s reports to obtain the data that the reports need.

BorrowingRequestDetails

ILL: 39041487	Lender: WIE	Patron: Collins, N	Southfield	PStatus: Dist Grad
Patron CIRC ID:	Patron Email:	Patron Notes:		
Lender String: WIE.CWR.XFF.STH.SUF	Status: SHIPPED	Internal PatronID:	Matched: [No]	
Date Requested: 1/28/2008	External Status: Shipped	Request Submitted Via: OCLC		
Expiry Date:				

On the borrowing side of Clio, the statuses that are considered as “complete” statuses are RecCopy, Returned, Unfilled, and Cancelled. On the lending side of Clio, the “complete” statuses are YesCopy, Complete, and No. In order to determine whether your requests have been handled properly, you need to perform searches of your database to find requests that do not have a completed status. I have simplified this process by adding to my Clio utility program 2 search tools that will find the non-complete requests on the borrowing and lending side of Clio. You can download this utility from the following location: <http://www.mediamax.com/judd/Hosted/Modules/ClioUtilities8.zip>. The zip file will contain the utility plus instructions on setup and use of the program. The main reasons for requests not getting updated to a completed status in Clio are:

1. Updates are not performed in Clio. Staff updates requests directly in OCLC. Example: Patron makes a request to cancel the request for material, and the request is Cancelled in OCLC, instead of using the Update Borrowing Request screen in Clio to cancel the request. Always be sure to update your borrowing requests in Clio.
2. Download categories in Clio that would update the request to a completed status are not selected. This issue is generally a borrowing side issue. You need to make sure that the Unfilled and Expired categories are selected.

Repairing the Clio Database

When a database is used, queries are used to retrieve data for forms and reports. When a query is performed, the size of the database increases to handle the query datasheet. Over time, the Cliodata.mdb file will become fragmented, reducing the performance of the database. In order to resolve this issue, a compact and repair of the database is needed. I recommend performing a compact and repair of the database at least once every month.

First step prior to attempting to perform a compact and repair is to make sure a current backup copy of the Cliodata.mdb file exists.

(Clio 5.2 and later versions users)

You can compact and repair the Cliodata.mdb file by first opening Microsoft Access on your computer. Once Access is open, go to Tools > Database Utilities > Compact and Repair Database. You will need to point the utility to your Cliodata.mdb file and then click the Compact button. You will then be prompted that either the file needs to be repaired or you will be prompted to Save the file. If you are prompted to repair the file, proceed with the repair and then you should be prompted to save the file. Once you are prompted to save the file, give it the new file name CliodataNew.mdb and then click the Save button. Once this file is made, close Access and then go to the location of the original Cliodata.mdb file. In this location, you will see the newly created file, CliodataNew.mdb. Rename the original Cliodata.mdb file to Cliodata.old and then rename the CliodataNew.mdb file to Cliodata.mdb. Once this has been done, you will need to perform a re-link of Clio on each computer through Administration > Re-link Database to refresh the links. If the compact and repair has been successful, you can eliminate the Cliodata.old file.

Getting the Most Out of Your Clio Reports

There are at least 27 borrowing reports with multiple variations on the criteria that you can select. In order to get the most out of these reports, certain standards and procedures must be maintained when processing requests. This section will discuss the special needs each report requires when processing a request; thereby receiving the information you expect when running a report.

Borrowing and Lending Groups

What are Groups? Groups are collections of institutions with a certain known relationship. Groups can be based upon many different things. You can have a group that holds all the libraries that are in your state. You can have reciprocal groups that you trade for free and groups that charge, etc.

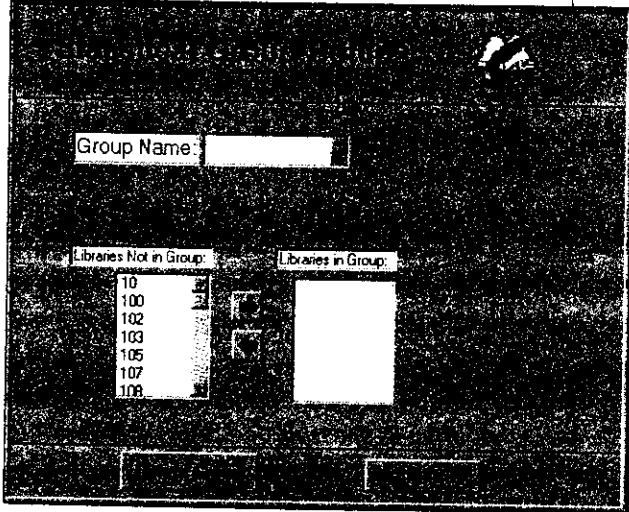
In order for the reports to provide you with accurate measures of group activity, you will need to create and manage the groups in your Clio database. There are several locations where you can create a group. Selecting a library from the Library Database or when you are reviewing new libraries are locations where you can create new groups. Below is the Libraries screen that is opened when you are reviewing new libraries or when you have selected a library from your Library database in Clio. If you are adding a group to a library that already exists in the Library Database, you will need to click on the **Edit Record** button to modify the Library record.

The screenshot shows the 'Libraries' screen in Clio. The title bar includes 'Libraries', 'AD', and 'US Agency for International Development'. The main content area is divided into three sections: 'Borrowing Information', 'Lending Information', and 'Group Information'. The 'Borrowing Information' section contains fields for 'Library Name' (APR ADIE CN), 'Address' (1300 Pennsylvania Ave NW, Room 440, Washington, DC 20523-1000), and 'Due Date' (30). The 'Lending Information' section contains fields for 'Borrow Method' (ITM), 'Daily Charge' (0.00), and 'Loan Charge' (0.00). The 'Group Information' section contains a 'Group' dropdown menu with 'All None' selected. Below these sections is a 'Contact Information' section with fields for 'Name' (Pats Lee), 'Phone' (302 712 4963), 'Email', and 'Fax' (302 716 3915). There is also an 'Add Address' field. At the bottom of the screen are three buttons: 'Edit Record', 'Cancel Edit', and 'Close'. A 'Update Complete' message is visible in the bottom right corner.

Group Names can be up to 50 characters in length. When you want to create a new group, you should check to see if the group already exists by clicking on the drop down arrow circled above. If the group does not exist, then you will enter the new group name

into the Assign to Group: text box. Once you have entered the group name, you will need to close the Library record to complete the assignment.

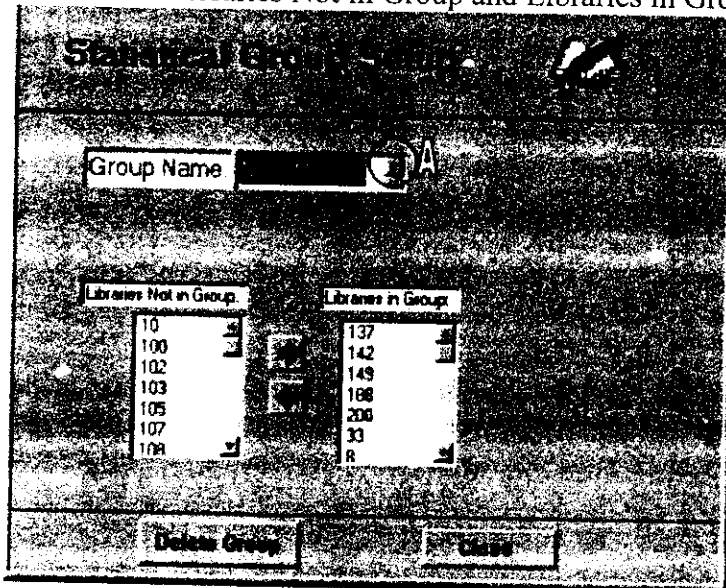
Another means of adding a new group is through the Group Add/Modify screen. The module can be accessed through the Reports & Statistics screen and then select the **Group Add/Modify** button. Once you have clicked on the button, the following will be displayed:



If you are creating a new group, you can enter into the Group Name: text box.

Modifying existing Library Groups

In order to modify an existing group, you will need to click on the arrow labeled "A". You will see a list of the groups you have created. Select one of the Groups. You will see a list of Libraries Not in Group and Libraries in Group.



In order to add or remove libraries in the group, you will need to select the library symbol from the appropriate column. Select the arrow button to perform the removal of or addition to the group.

Note: If you want to determine which libraries have not been assigned to a group, you can run the report called "Libraries Not Belonging to Any Group". This report can be found by selecting Statistics on one of the Main Menus and then selecting More Reports.

Warning:

Cumulative totals should not be ascertained from reports based upon group criteria. Libraries may be part of multiple groups thereby inflating the cumulative total displayed on a report. If you want a cumulative total, you should run a report based upon the setting for All Libraries.

Date Fields queried by the Report

Most of Clio's reports use the StatisticsDate field for the dates used for the time period selected when running the various reports. The StatisticsDate field represents the last time the request was updated via the Update Borrowing Request screen. The RequestDate field is utilized when running the Copyright Status Report and Copyright Compliance Report because the reports need to use the date in which the copyright material was requested. More information about the use of the RequestDate field is discussed later in the Copyright Reports section.

Borrowing Reports

Items Received/Unfilled

This report will give you information about the number of requests that were received and a general total of the requests unfilled*. The loan total includes requests that are on loan as well as requests that have been returned during the period.

*The "unfills" total will include requests that have been updated to Unfilled as well as requests updated to Cancelled. If you are updating requests that have been re-requested to Cancelled, then you can get an accurate total of Unfills by running the Patron Status Report. This report does not combine the Cancelled and Unfilled requests into one total.

Requirements for information to be gathered by this report:

1. Photocopy requests must be updated to Received Copy.
2. Borrowing requests must be updated to Received Loan or Returned.
3. Borrowing requests that are cancelled or go unfilled must be updated to cancelled or unfilled respectively, to be considered in the "Total Unfills" amount.

Report Styles:

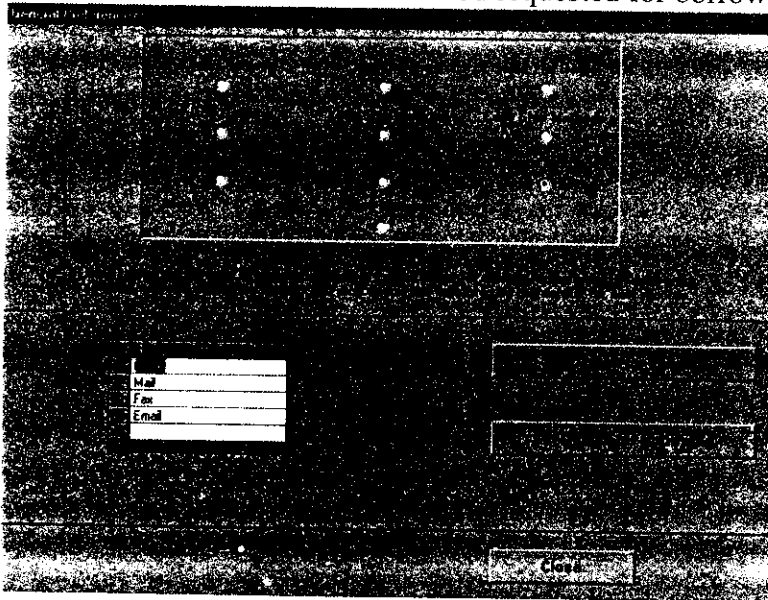
The results of the report are based upon whether the report is configured to focus on a library, a library group, multiple library groups, or all libraries.

Method Request Submitted Report

This report will give you information on how requests have been submitted. The report bases the methods submitted on the list of possible methods that are displayed under Preferences/General/Request Methods.

Requirements for information to be gathered by this report:

You will need to set a default method requested for borrowing.



It is important to change the method requested on the ALA request form to the appropriate method requested when creating an ALA request in Clio if it does not match the default setting. Requests that are downloaded from the OCLC will be given the Request submitted selection of OCLC automatically. Requests that are prepared by clicking on the **Prepare Email Request** will receive a request submitted by "Email".

Report Styles:

The report will take two forms depending upon whether the report is based upon library groups or all libraries.