

Clio Overview

Quick Look at Clio System

Jennifer Perkins - jperkins@cliosoftware.com

October 26, 2018

- Structure and Overview
 - System structure
 - Patron application overview
 - Submission options
 - Staff application overview
- Workflow
 - Processing new requests (Borrowing)
 - Receiving items (Borrowing)
 - Processing new requests (Lending)
 - Supplying items (Lending)
 - Examples
- Statistics
- Copyright
- NCIP
- Development/feature requests
- IT involvement
- How to see an online demonstration

- Patron website
 - Any browser
 - Log in with campus single-sign-on or LDAP
 - Supports OpenURL
- Staff website
 - Any modern browser. E.g. Firefox, Chrome, IE9+, Edge, Safari
 - Multiple login roles (restrict access)
- Central database
- Hosted by Clio - annual fee
- Send/Receive requests with WorldShare/Rapid/Docline/Email
- Check books in/out and create temporary bib records in your LMS via NCIP 2.0
- Branch support
 - Separate shipping details, email reply-to/signature, staff notifications
 - Option to use staff logins which only see 'their' branch's requests
 - Separate statistics
- Docline
 - For now, uses Clio-Docline tool and work is split between Clio and Docline websites
 - New Docline should provide more options to bring Docline into line with other systems
- ISO 18626
 - In development
 - Internal testing end of 2018

- Flexible forms
 - Customize fields, labels, required fields, data format, provide instructions for a field, include checkboxes, lists, date-pickers
 - Add copyright declaration, response
 - Check local holdings
 - Unlimited request form types
- Submission methods
 - Enter request manually
 - Submit file with a batch of citations
 - Auto-fill from OpenURL
- Confirmation emails and sign-up emails
- Request progress, history, retrieve pdf files, request renewals
- Advanced options
 - Review workflow to obtain approval, account number, or copyright declaration from someone other than the person creating the request
 - Request limits (flexible rules)
 - Hard or soft limits
 - Notification emails to staff
 - ILL staff edit all the pages without html experience
- Coming Soon
 - Retrieve bibliographic data from PubMed IDs

- All in one place - Each request holds all the tools you need
 - Communicate with ILL services
 - Communicate with LMS
 - Search web catalogs, web sites
 - Email patron, library, library staff
 - Update requests
 - Upload pdf files
 - Send notices
 - Print book straps, labels or shipping labels
 - Review
 - Request history
 - Request limits
 - Previous requests for journal title
 - Patron/library details
 - Account balance
- Filters help find requests you need
 - e.g. shipped items which might be lost, items which are due soon
- Quick and advanced search, with export of results
- Dedicated pages to speed up routine tasks, e.g. updating, uploading pdfs for multiple requests
- Automatically retrieve messages/updates from other systems
 - Clio updates the request and tags any requests which need your attention
- Large array of statistical reports
- Library staff control how automated the process is

Review

- Clio applies default settings, which could include sending the request directly to an ILL service (WorldShare, Rapid)
- Clio shows all the info about the request, patron, account, soft request limit status, results of your chosen web searches (catalog, open access sites, WorldCat, Pubmed, Google, whatever you like)
- Review all the information and decide what's next
 - Add any unique IDs to the request with shortcut update
- Coming Soon: Update bibliographic information automatically from search results

Act

- Use one of the Order Tabs to send request
 - WorldShare, Rapid, Email
 - Docline requests marked 'ready' and produced in Docline website with help from tool (for now)
- Or, contact patron with a question
 - Templates for common emails
 - Include response buttons
- Or, forward the request to Collections department
- Or, fill the request with a local/available item
 - Send notice with link to the pdf
 - Or, print pick slip, place on hold and send notice for pickup

- Copies
 - Displays info from ILL Service (including pdf url/password, charges)
 - If desired, pdf details are automatically copied into patron pdf field
 - Pdf file can be dragged/dropped onto Clio to upload file into Clio's space, where Clio will create url link and password
 - Displays citation year and page count - adjust if needed
- Loans
 - Displays info from ILL Service (due date, restrictions, charges)
 - Automatically adjusts patron's due date and charges per library preferences
 - Staff can adjust due date, charges, or restrictions if needed, and add barcode(s) and description

After update is processed in Clio, all external systems (ILL services, LMS) are updated automatically, any desired notices are emailed and printouts (book straps, labels, cover sheets) are printed.

Review

- Clio retrieves new requests automatically (Doctype, with help from Clio-Doctype tool)
- Clio shows all the info about the request, library (including your notes or warnings), results of your chosen web searches (catalog, Google, whatever you like)
- Review all the information and decide what's next
 - Add any unique IDs, call number, shelf location to the request with shortcut update

Act

- Print pick slip with call number, location details, shipping label (customize pick slip to be just what you want)
- Or, contact library with a question
 - Using ILL service or email (with response buttons)
- Or, update to No
- Or, fill the request with a digital item if allowed
 - Provide link or upload pdf
 - Send notice with link to the item

- Copies
 - Pdf file can be dragged/dropped into Clio to upload file into Clio's space, where Clio will create url link and password
 - Or, link from elsewhere can be entered
- Loans
 - Staff can adjust due date, charges, or restrictions if needed, and add barcode(s)

Profiles quickly update multiple fields at once (charges, due date, restrictions, ship via) and borrowing libraries can have a default profile.

After update is processed in Clio, all external systems (ILL services, LMS) are updated automatically, any desired notices are emailed and printouts (book straps, labels, cover sheets, invoices) are printed.

- Patron
 - Clicks an OpenURL link
 - Redirected to Clio, with single sign-on
 - Sees pre-filled request form and clicks 'Submit'
 - Receives confirmation email
- Clio-Borrowing
 - Auto-send to WS/Rapid, or
 - Review request
 - Send to WorldShare
- Clio-Lending
 - Auto-retrieve new requests
 - Review request, get call #
 - Print pick slip and scan
 - Drag pdf into Clio and update to Filled
- Clio-Borrowing
 - Auto-retrieve updates
 - Auto-tags this item for attention
 - Update to Received
- Patron
 - Receives email with link/password
 - Link is available in patron app as soon as Clio has it
- Clio takes care of updating WorldShare and LMS
- Coming Soon:
 - Update to Received will be (optionally) automated

- Patron
 - Clicks an OpenURL link
 - Redirected to Clio, with single sign-on
 - Sees pre-filled request form and clicks 'Submit'
 - Receives confirmation email
- Clio-Borrowing
 - Review request
 - Send to WorldShare
- Clio-Lending
 - Auto-retrieve new requests
 - Review request, get call #
 - Print pick slip
 - Update to Filled
 - Add barcode(s), restrictions, description
- Clio-Borrowing
 - Auto-retrieve updates
 - Item arrives
 - Update to Received
 - Add local barcode(s), additional restrictions, description (e.g. 3 volume set)
- Patron
 - Receives email with instructions
 - Includes patron-due-date, restrictions, description
 - Picks up book>Returns book
- Clio-Borrowing
 - Update to Returned (ship back)
- Clio-Lending
 - Item arrives/Update to Complete
- Clio takes care of updating WorldShare and LMS

- Borrowing Includes
 - Loans/Copies/Unfilled/Charges
 - Lenders can be grouped
 - Collection Development
 - Grouped by Title, showing number of requests, number of unique departments and patrons
 - Turnaround Time
 - Department
 - Status
 - Reason for Cancel
 - And more...
- Lending Includes
 - Loans/Copies/Unfilled/Charges
 - Borrowers can be grouped
 - Shipping method
 - Turnaround Time
 - Reason for No
 - And more...

Report results can be exported to Excel (or other spreadsheet program). If necessary, library can have access to their database if they want to build their own reports.

Search results can be exported as well, useful for a one-off question.

- Copyright declaration
 - Can be included on request forms in patron site
 - Customized by you
 - Response is recorded after person has been authenticated and saved for the life of the request
 - Response can be a checkbox, list or textbox
- Copyright Status
 - Report shows year-to-date requests for each title from within the appropriate citation dates
 - Allows you to review for inconsistent titles, titles getting close to the limit
- Within a request
 - See previous requests for the specific title, allowing you to see request date and citation date
- Copyright Compliance
 - Report with requests over the fair use limit
 - Includes ISSN, Citation Year, Pages

- Clio supports NCIP 2.0
 - All messages are supported
 - Messages can be attached to any Clio update event to fit your LMS workflow
- Process on the LMS end depends on their system - they vary quite a bit
- Some LMS track all ILL requests (loans and copies) from the beginning and can track transit from central to branch libraries
- Other LMS only process loans from the time of check-out
- For items received, Clio can use your barcodes or create new ones

- Frequent updates
 - Installed out of business hours
- Surveys taken within the staff site for potential changes (if the vote is 50/50 then the change is optional)
- Feedback/Trouble/Feature-Request from with staff site
- Feature requests are usually adopted, if possible
- New Statistics ideas always welcomed
- Truly custom requests
 - For more complicated, unique-to-library requests
 - Priced as a custom task

- Required for connections to your systems
 - Patron login
 - OpenURL settings
 - NCIP setup

Thank you

For live, online demonstration please contact me at:

jperkins@cliosoftware.com