

axiell

WeLib user guide



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Preface

Axiell provides innovative solutions and services for libraries, schools, archives, museums and public authorities. Our focus is to facilitate the work of the librarians and to create maximum availability for users.

See also: www.axiell.com

About this guide

This guide contains conceptual descriptions and step-by-step procedures to help you using all the functionality in WeLib. This guide describes functionality for WeLib stand-alone installations as well as for WeLib Search, that uses Quria as library system. Different functionality is available depending on the customer setup.

Concepts

Different versions of WeLib

There are two versions of WeLib.

WeLib Search

In WeLib Search, functionality related to collections, reservations, acquisitions and more is handled in a library system such as Quria.

WeLib stand-alone

In WeLib stand-alone, all functionality is managed in WeLib.

Search, find and discover

You can search for digital and physical resources from a variety of sources.

Searches are filtered on an educational basis: by school year, school subject, keywords, subject area, type of resource and similar classifications. The service classifies teaching resources from an educational perspective using pedagogical language.

My page

A personal library for everyone. On My page, the user can find all of their ongoing activities, as well as the resources they are using or have chosen to save. My page offers a customised profile page to which the user can add information such as a profile picture and contact information. Certain parts of the profile can be downloaded from the school administration system and then locked. The profile picture can only be seen by the user, not by others. Users can also collect personal digital resources on My page, which can be labelled and shared with others.

Tools

Customised tools for each role can be configured for use in the system. Please contact the contract owner or your librarian for details for your installation. Students, teachers and librarians each have a set of tools, such as writing reviews, publishing resources and creating collections, to support the educational process in a variety of ways.

Users can send messages and share records, collections etc with each other.

WeLib stand-alone: Teachers and librarians can also send messages to an entire class and to defined groups.

The user interface in WeLib

You can search in the catalogue and share results even if you haven't signed in.

After signing in to WeLib, you will see the resources that you have access to. You can for example, depending on how your system has been configured, write reviews, publish works and create collections.

You find your own page in the menu; My page.

The screenshot shows the WeLib user interface for a user named Alma Svensson. At the top, there is a header bar with the user's name, a profile picture, and an 'About me' link. Below the header, the main content area is divided into two sections: 'MY BOOKSHELF' and 'My loans'.

MY BOOKSHELF

On the left, there is a 'MANAGE COLLECTIONS' section with a 'New Collection' button. The main area displays a grid of books:

- Spanish Travel Phrases** by M Christmansson. Buttons: Remove, Read.
- Northanger Abbey** by Jane Austen. Buttons: Remove, Read.
- The phantom of the opera** by Gaston Leroux. Buttons: Remove, Read.
- Adventures of Gerard** by Arthur Conan Doyle. Buttons: Remove, Read.

My loans

On the right, there is a 'View receipt' link. The main area displays a grid of books:

- Factfulness : ten reasons we're wrong about the world - and why things are better than you think** by Rosling, Hans, 1948-2017. Buttons: Reloan.
- The hunger games** by Collins, Suzanne. Buttons: Reloan.
- Malala Yousafzai : ett liv** by Doeden, Matt. Buttons: Reloan.
- Min historia** by Obama, Michelle, 1964-. Buttons: Reloan.

You find all news about the service under **What's new in WeLib?** If the latest news aren't visible or if something else seems outdated or strange, you can try to clear the browser cache.

Search

You can search for resources by typing keywords in the search box or filtering out a search result using the pre-defined filters.

You get the best result by combining several keywords. The search is done in many of the resource's properties, such as title, author, description, subject and series.

If you type incorrectly, you can revert and change the keyword by pressing the backspace button.

In the filters at the right you can choose for example language, media type and genre - depending on how the filtering is set up for your school.

At the top of the page you can sort the search results, for example alphabetically, by new arrivals or most liked titles.

My page

My page is the bookshelf and a place for everything you do in WeLib.

On My page, you find your collections, both private and public. You see which collections you follow.

This is where you renew loans and can delete or renew your reservations.

There are also your own resources, such as reviews.

This is also where you can make settings regarding yourself.

1. Select **Name/My page** to access My page.

Editing personal information

Depending on how your system has been configured, you can edit some information about yourself. Contact the librarian if you need help with this.

1. Select **Name/My page/About me**.
2. Select **Edit profile** to add or edit email address and phone number.
3. Select **Change password** to change the password
Authorized staff can help changing your password if you have forgotten it.
4. Click on the settings cogwheel on your profile picture to upload a new picture. The profile picture can only be seen by yourself, not by others.

Renewals

On My page, you can renew ongoing loans. If a book can be renewed, you can choose **Renew** on the title.

Reservations

On My page, you see when reserved books are ready to be picked up at the library, and where to find them. If you wish to cancel, renew or delete a reservation, you do so in My page.

See also: [Reservations](#)

Collections on My page

On My page, you can see all the collections that you have created or follow. They are also available under **Name/Collections**.

See also: [Collections](#)

Published resources

You can see your private and publicly published resources, these may be eBooks, films, links, etc.

See also: [Self-publishing](#)

Reviews

You can see your private and published reviews on My page.

See also: [Reviews](#)

Checking out and checking in resources

Depending on how the system has been configured, a signed-in student can check out items, and teachers and librarians can check in resources for others. If the school uses the self-service functionality, students can also check out and check in using self-service.

WeLib stand-alone: Checking out an item

1. Select **Check out**.
2. Scan the barcode of the item.

WeLib stand-alone: Checking in an item

1. Select **Check in**.
2. Scan the barcode of the item.

Managing loans

Depending on the system setup, users can check out and in items after signing in to WeLib.

WeLib Search: Loans, loan periods and reminders are managed in Quria.

WeLib stand-alone: Only a person with librarian permission can see the users' loans.

Managing loans in WeLib Search

Users (including teachers and librarians) can sign in to WeLib and check out items for themselves, provided that the system is configured for checkouts.

When a librarian needs to check out for a user, this is done in Quria.

Teachers and librarians can check in items for themselves and others.

Managing loans in WeLib stand-alone

If enabled in the system setup, students can check out items after signing in to WeLib. Teachers and librarians can check out and in for themselves and for others. Students can check out and in using self-service if this functionality has been enabled.

Checking out for others

1. Select **Library/Check out**.
2. Find the user.
3. Scan the barcode of the item.

Checking in for others

1. Select **Library/Check in**.
2. Scan the barcode of the item.

Overview of loans

Note:

Some of the search/filtering options are currently only available for Swedish WeLib installations.

Select **Library/Loans** to get an overview of the loans made by students at the school/schools that you have access to. You can filter on student, the unit the item belongs to and status to fetch loans. You can filter on title, student and barcode in the search results.

You can also see if the students have borrowed items that belong to other schools.

If no classes are visible, this is either because they have not been added to WeLib, or that they are added but that the librarian has the same level of permission as the students. A librarian with Local administrator permissions can see user permissions and set these properly.

Here, you can extend loan periods and register manual check-ins, and the library administrator can send reminders of overdue loans.

You can also print lists of books on loan.

Note:

You need to allow pop-up windows in the browser in order to print lists of loans.

Extending loans

1. Select **Extend loan** to extend the loan by a further number of days according to the setting for the loan period. You cannot extend the loan period for a fixed due date.

Checking in manually

1. Select **Check in manually** when a user checks in a resource (or if you need to remove the resource for another reason).

Sending a reminder

1. Select **Send reminder** if you want to send a user a reminder that it is time to return the resource.

Reservations

WeLib Search: Reservations are managed in Quria.

Reservations in WeLib stand-alone

You need to sign in to make a reservation. Titles on loan can be reserved from the search results or from the catalogue entry.

1. Search for the title you want to reserve.
2. Click **Reserve**.
In the window that opens, you make the reservation.
3. Click **Reserve** and **OK**.

When the title is returned to the library, you will get a notification that the title is ready to be picked up.

Managing reservations in WeLib stand-alone

It's possible to reserve items on loan as well as items on the shelf in the library.

Reserved titles can have the following statuses:

- On shelf - the title is located at the library and is reserved, but has not yet been assigned to the user.
- Reserved - the title is on loan, but reserved by another user who is waiting for it.
- Trapped - the title is trapped by the librarian but has not yet been assigned to the user.
- Ready for pick-up - the user that has reserved the title has received a notification that the title can be picked up at the library.

Note:

Titles that users have been notified about stays ready for pick-up for 7 days. This is a default value that cannot be changed.

Settings

1. Select **Library/Manage the library/Reservations**.
2. Select for which school the settings should apply.
3. Enter the email address to which reservation notifications will be sent.
4. Enter the name of the shelf where reserved items are kept while waiting to be picked up.
5. Select for how many days a reservation is valid.

If you have entered erroneous settings, an error message is displayed, stating that reservations have not been activated at this school.

Checking in a reserved title and notifying about trapped item

1. Scan or type the barcode of the item that is checked in.
A message about the title being reserved is shown temporarily. The same message is found under **Returned items**.
2. Place the item on the reservation shelf.
3. Select **Library/Reservations**.
The item that was just checked in has status **Trapped**.
4. Click on the book icon (**Enter item**).

5. Select the newly checked in item and click **Save and notify**.

The status in the reservation list changes to **Ready for pick-up** and the user receives a notification that the title is ready to be picked up. The items that have been notified will be ready for pick-up for 7 days in the system. This is a default value that currently cannot be modified.

The reservation is removed when the title has been picked up by the person who got the notification.

Reserving an item on the library shelf

Reservation of an item on a shelf in the library is made similarly to reservation of an item on loan:

1. Search for the title you want to reserve.
2. Click **Reserve**.
3. Select a user or make the reservation for yourself.
4. Click **Reserve** and **OK**.

5. Select **Library/Reservations**.

The item has status **On shelf**.

An email is sent to the address entered under **Library/Manage the library/Reservations**.

6. The librarian fetches the item in the library and puts it on the reservation shelf, and then follows the same flow to enter the item (as described for reservation of an item on loan) and sends a notification to the user.






The status in the reservation list is changed to **Ready for pick-up** and the user has received a message that the title is ready to be picked up.

The reservation is removed when the title has been picked up by the person who got the notification.

Overview of reservations

1. Select **Library/Reservations** to get an overview of all reservations at the school.

The symbols next to the titles in the list, and what actions you can perform, depend on the status of the titles.

	Enter item	Scan or select a trapped item and then notify the user that it is ready for pick-up.
	Edit	Update a reservation with new information, such as editing the item number.
	Send reminder	Remind the user about a reservation.
	Print	Print the reservation list (using the web browser print functionality).
	Remove	Remove a title from the reservation list.

Reservations in My page

On My page, the user sees when reservations are ready to be picked up at the library, and where to find them. If users wish to cancel, renew or delete their reservation, they do so on My page.

WeLib stand-alone: Bookings

Booking using a calendar is an alternative to using reservations. This means that it is not possible to book and reserve the same title.

Booking statuses

You get an overview of current bookings by selecting **Bookings** in the menu. Bookings can have one of the following statuses.

Status	Description
Planned	The booking can be edited prior to the start date of the booking. The booking dates and number of items can be edited.
Active	The start date of the booking has occurred and it is time to check out the booking to the teacher that made the booking or directly to the students that have been assigned the class set.
Completed	The booking is finished and the booking can be deleted.

Notes:

The loan period of a booking overwrites the loan period of the selected item. It is recommended not to allow renewal of resources in the study material module as this will prevent the logic of the booking to work.

Booked resources can still be borrowed, and the system does not grant that a booked resource is available when it's time to pick up the resources. Because of this, it is recommended that resources included in the study material module are only physically available for persons that are to pick up the bookings.

Making a booking

1. Filter for study material and perform a search.
2. Select the title you want to book.
3. Select the school where the booking will be used. For teachers with access to only one school, this school is preselected.
4. Select the school where the booking will be picked up. For teachers with access to only one school, this school is preselected.
5. Select number of items to book.
6. Select booking period in the calendar and confirm your booking.

Editing booking dates or number of booked items

- Use the editing tool (the pen) to edit planned bookings.

Checking out a booking

1. Find a booking with status **Active** and select **Check out**.
2. Check out to the teacher that made the booking or directly to the students.
3. If fewer items than requested in the booking is checked out, make sure to finish the booking by selecting **Complete booking**. This will make it possible for others to book the available items.

Searching for a booking

You can search for bookings using filters and in the tables.

Collections

A collection can include different kinds of resources: physical books, eBooks, audio books, films or anything else that is searchable in WeLib.

The person who creates a collection chooses whether to make it private or public (searchable to others). Public lists can be searched using filters and users can follow these lists. Private lists can be shared with selected people, classes or groups

A collection made by a student or a librarian can be published at the school.

Creating a collection

You can create a collection from the **Name** menu, or from a results list or catalogue record.

1. Select **Name/Collections/Create new collection**, or right-click the results list or catalogue record.
2. Select if the collection should be private or public.
3. Add an image if you want to, in jpg or png format. The image can be a maximum of 20 MB. It is automatically scaled and a preview will be displayed before publishing.
4. Click **Save**.
5. Find the titles you want to include in the list and select **Add to collection**.

Adding a resource to a collection

1. Perform a search in WeLib.
2. From the catalogue entry or results list, select **Add to collection**.

WeLib stand-alone: You can also scan the item directly into your list, if it is available as a physical resource.

Sharing a collection

The owner of a collection can share it with others. The recipient of a shared collection can choose to follow the collection.

Reviews

If writing reviews has been activated in your system, users can write a review about any title.

1. Locate a title that you want to review and open the catalogue record.
2. Select **Write a review**.
3. Write your review and select if it should be private or public/public by approval.

The review can now be shared with others in WeLib.

Managing reviews

Reviews can be written by students, teachers or librarians.

Settings in your library system can make it mandatory that a teacher or librarian approves student reviews before they can be searched for in WeLib.

You find **Approve publishing** in the name menu.

Authorized staff will see a digit next to the name menu when there are reviews pending approval.

Liking and sharing resources

Popular books and other resources can get likes. You can sort a search result on Most likes to see popular titles.

You can also recommend titles on Facebook, Twitter or via email. A recommendation can also be shared directly in WeLib by searching for a user or a group.

Liking a title

1. Find a title that you want to like and click **Like** for this catalogue record.

Recommending a title

1. Select **Share** for the catalogue record or from the search results.

Self-publishing

Self-publishing needs to be activated for users that should be able to add content to WeLib.

1. Select **Self-publish** under the name menu.
2. Select file type.
3. Write a text, upload a file or enter the URL of the file to be uploaded.
4. Add an image if you want to, in jpg or png format. The image can be a maximum of 20 MB. It is automatically scaled and a preview will be displayed before publishing.
5. Add metadata such as language and CC-licenses.
6. Select if the file is to be private or public/public by approval.
7. Select the start- and end date for the published resource.
8. Click **Save**.

Managing publishing

Teachers or librarians can approve the works that students have published, before they become searchable in WeLib.

You find **Approve publishing** in the name menu.

You will see a digit next to the name menu if there are works pending approval.

Configuration

At project start, the school can decide how WeLib is to be configured. For changes after that, you can create a customer.hornbill.com/axiell issue. Changes after the initial setup come with an additional cost.

Configuration of WeLib stand-alone

General settings

Functionality	Default setting	Additional cost	Comment
Collections	On	No	Can be deactivated.
Collections can be connected a selected school	On	No	Can be deactivated.
Reviews	On	No	Can be deactivated.
Share function	On	No	Can be deactivated.
Automatic reminders	On	No	Can be deactivated.
Update details on My page	On	No	
Change password on My page	On	No	
Messages in WeLib	On	No	
Messages in WeLib sent as email	On	No	Requires that the users have email addresses registered in their accounts. Can be deactivated.
Statistics	On	No	
Reset of password on the sign-in page	Off	No	Only for customers without connection to external systems such as Skolfederationen.
Add additional departments	Off	No	Configuration by Axiell.
Reservations	Off	No	
Contact form on the start page	Off	Yes	
Self-service	Off	Yes	
Study material module	Off	Yes	
Bookings module	Off	Yes	Can only be ordered for installations that include the Study material module

Settings for students

Functionality	Default setting	Additional cost	Comment
Students can borrow themselves	Off	No	
Self-publishing	Off	No	
Public reviews	Off	No	Users' reviews become private as default.
Public collections	Off	No	Users' collections become private as default.

Settings for teachers

Functionality	Default setting	Additional cost	Comment
Checkout	On	No	
Check-in	On	No	
Share collections and more with all groups in WeLib	Off	No	With this setting, there is no need to add teachers as editors for separate classes/groups; the teacher can share lists and more with all classes at the school.
Handle publishing	On	No	Teachers can review students' published works and reviews. Requires an extra permission: Approve selfpub.
Study material module: handle loans and add items to cata-	Off	Yes	Requires the Study material module and an extra permission: Handle study material.

Functionality	Default setting	Additional cost	Comment
logue records			

Settings for librarians

Functionality	Default setting	Additional cost	Comment
Checkout	On	No	
Check-in	On	No	
Administrate users	On	No	Requires an extra permission: Local administrator.
Handle and remove others' collections	On	No	Requires an extra permission: Edit collection.
Handle publishing	On	No	Librarians can audit students' published works and reviews. Requires an extra permission: Approve selfpub.

Configuration of WeLib Search

General settings

Functionality	Default setting	Additional cost	Comment
Collections	On	No	Can be deactivated.
Collections can be connected a selected school	On	No	Can be deactivated.
Reviews	On	No	Can be deactivated.
Share function	On	No	Can be deactivated.
Messages in WeLib	Off	No	Can be deactivated.
Messages in WeLib sent as email	Off	No	Requires that the users have email addresses registered in their accounts.
Update details on My page	Off	No	
Change password on My page	Off	No	
Reservations	Off	No	
Contact form on the start page	Off	Yes	
Self-service	Off	Yes	

Settings for students

Functionality	Default setting	Additional cost	Comment
Students can borrow themselves	Off	No	
Self-publishing	Off	No	
Public reviews	Off	No	Users' reviews become private as default.
Public collections	Off	No	Users' collections become private as default.

Settings for teachers

Functionality	Default setting	Additional cost	Comment
Checkout	On	No	Teachers can only check out to themselves.
Check-in	On	No	
Share collections and more with all groups in WeLib	Off	No	With this setting, there is no need to add teachers as editors for separate classes/groups; the teacher can share lists and more with all classes at the school.
Handle publishing	On	No	Teachers can review students' published works and reviews. Requires an extra permission: Approve selfpub.

Settings for librarians

Functionality	Default setting	Additional cost	Comment
Checkout	On	No	Librarians can only check out to themselves.
Check-in	On	No	
Administrate users	On	No	Requires an extra permission: Local administrator.
Handle and remove others' collections	On	No	Requires an extra permission: Edit collection.
Handle publishing	On	No	Librarians can audit students' published works and reviews. Requires an extra permission: Approve selfpub.

Filtering using search facets

It is possible to sort by a number of terms in the search facets. The following search facets can be selected:

- Source
- Resource type (media type)
- School
- Department (in WeLib stand-alone, select a library in order to see departments)
- Level
- Genre
- Language
- Author
- Publication year
- Target group
- Subject area
- Shelf mark (in WeLib stand-alone, you can select to show SAB and/or Dewey)

In WeLib stand-alone, the following additional search facets are also available:

- Location
- Series
- Subject
- Title (not part of the standard configuration)
- Publisher (not part of the standard configuration)

The headings of the search facets can be changed, for example naming Shelf mark as SAB or Language as Spoken/written language.

Roles and permissions

There are three roles in WeLib - student, teacher and librarian. Each role uses WeLib in a different way. The roles can be assigned to other categories of personnel at the school too.

Teachers and librarians have special permissions.

Role	Permission	Description
Teacher	Approve selfpub	Permission to approve publications from students
	Handle study material	WeLib stand-alone: Permission to add items for study material and make settings for these.
Librarian	Local administrator	Permission to administrate users in WeLib
	Approve selfpub	Permission to approve publications from students
	Edit collection	Permission to remove others' collections
	Edit order information	Permission to enter customer numbers and to see the Orders tab under Manage the library .

Student

A student can be assigned the following permissions:

- Find, borrow, reserve and read (streaming) titles
- Receive and give recommendations
- Like and review titles
- Create and follow collections
- Share titles and collections with others
- Publish their own books, files etc
- Search for resources

Teacher

In addition to all permissions that students can be assigned, teachers can also be assigned the following:

- Check out and check in titles on behalf of students
- Publish files
- Create collections based on different resources
- Share collections with others
- Follow others' collections
- Approval of publication (special permission)
- WeLib stand-alone: Handle study material (special permission).

Librarian

A signed-in librarian can work with the following tasks:

- Manage the start page and show relevant resources on the school's page
- WeLib stand-alone: Manage circulation (loans, reservations etc.)
- WeLib stand-alone: Manage the library (loan periods, locations etc.)
- Send titles and collections to individual students, classes or groups of students/teachers

- Approve users' published eBooks, reviews etc
- Manage and remove others' collections
- Edit roles and classes/groups

Signing in and user accounts

About signing in

You can perform searches and share your results without being signed in.

When you have signed in, you will have access to services that require signing in, such as making reservations and creating collections.

Creating accounts

WeLib stand-alone: Axiell can add WeLib users for you. This service comes at an additional cost. A popular solution is to allow users to use federated sign-in, such as Google or Microsoft accounts.

For schools that add users through synchronisation with a student list, users will be updated automatically.

WeLib Search: The user accounts from Quria are used to sign in, and administration of users is handled primarily in Quria.

A librarian with Local administrator permissions can add and edit users, classes and groups.

See also: [Managing users, classes and groups](#)

Changing password

Depending on how the system has been configured, signed-in users can change their password under **Name/About me/Change password**.

Forgotten password

If a user has forgotten their password, then the librarian with Local administrator permissions can help them change it.

WeLib stand-alone: The **Reset password** functionality makes it possible for users to reset their accounts themselves, provided that they have entered an email address.

Single sign-on (SSO)

Single sign-on (SSO) can be applied, and currently, signing in via Google, Skolfederationen and Microsoft Office 365 is supported. This service comes at an additional cost.

Signing in with Google accounts

In order for students to sign in to WeLib using their Google account, the school/municipality has to contact Axiell support to connect signing in to Google to the school's/municipality's WeLib. The school/municipality gets an application name from Axiell.

Once Axiell has given information that this is done, the school/municipality needs to follow the instruction below:

1. Follow the instructions under [Set up your own custom SAML app](#) to set up a Google account as an administrator for your organisation.
2. Axiell needs the following information from the school/municipality:

Application name	welib[school/municipalityname]
ACS URL	https://api.welib.se/uaa2/callback?client_name=saml2[school/municipalityname]
Entity ID	https://api.welib.se/uaa2/callback
Start URL	https://[school/municipalityname].welib.se

3. Connect the attributes that are to be sent after signing in. For more information, please refer to [User attributes](#) below.
4. Export a SAML metadata file (xml) and send this to Axiell support.
5. Follow the instructions under [Turn on your SAML app](#).

Axiell assists with test before single sign-on is activated for the students.

Signing in using Skolfederationen

In order for students to sign in to WeLib using their Skolfederationen accounts, the school/municipalityname has to be a member of **Skolfederationen**. Then follow the instruction below:

1. Enter Skolfederationen as *Identity provider*.
2. Inform Axiell support that your WeLib is to be connected to this.
Once this is done, WeLib will exist as *Service provider* with *entityID*
`https://api.welib.se/uaa2/saml2/entity/saml2Skolfederation[school/municipalityname]Client`
3. Verify that correct attributes are returned for this *entityID*.

Signing in using Microsoft Office 365

In order for students to sign in to WeLib using their Microsoft Office 365 accounts, the school/municipality has to follow steps below:

1. Configure Microsoft Office 365 IdP for SAML 2.0 SSO.
2. Add WeLib as a new application with SAML Single sign-on.
3. Configure user attributes with mappings in agreement with Axiell or according to User attributes below.
4. Send the IdP metadata xml file to Axiells support.

Axiell support sends the SP metadata xml file to the school/municipality and sets up the SSO integration in WeLib.

User attributes

The school/municipality needs to configure which user attributes that should be sent to WeLib after signing in using single sign-on.

Which user attributes to configure and include depends on if the school/municipality has ordered separate loading of users or if accounts are to be created manually at the initial time of signing in.

WeLib Search: Single sign-on for WeLib schools with Quria as backend systems must use attributes that exist in the backend system.

Single sign-on + loading of students

If the school/municipality has ordered loading of users via sync or manual load of a csv file, the users will exist in WeLib already at the initial sign-in. Then WeLib only needs one attribute to be able to match with the loaded users. This can be a unique user name or social security number:

Alternative 1, user name: `urn:oid:1.3.6.1.4.1.5923.1.1.1.6` or `eduPersonPrincipalName` or `username` or `id`

Alternative 2, social security number: `urn:oid:1.3.6.1.4.1.2428.90.1.5` or `norEduPersonNIN` or `Personnummer`

Single sign-on only

User accounts can also be created at the time of the initial sign-in. Currently, WeLib can receive the following attributes:

Attribute	Value	Comment
User name	<code>urn:oid:1.3.6.1.4.1.5923.1.1.1.6</code> or <code>eduPersonPrincipalName</code> or <code>username</code> or <code>id</code>	
Given name	<code>urn:oid:2.5.4.42</code> or <code>givenName</code> or <code>Fornamn</code>	
Surname	<code>urn:oid:2.5.4.4</code> or <code>surName</code> or <code>sn</code> or <code>Efternamn</code>	
Email	<code>urn:oid:0.9.2342.19200300.100.1.3</code> or <code>mail</code>	

Attribute	Value	Comment
School unit code	<i>urn:oid:1.2.752.194.10.2.4</i> or <i>sis-SchoolUnitCode</i> (8 siffror)	When a user signs in via single sign-on and an account is to be created "on-the-fly", then WeLib checks if the attribute for school unit code matches a school that is connected to a library in WeLib. If so, an account belonging to the correct school is created. The user may not sign in unless there is a match. Please contact Axiell for alternative solutions if it is not possible to send a school unit code.
Role	<i>urn:oid:1.3.6.1.4.1.5923.1.1.1.7</i> or <i>eduPersonEntitlement</i>	If the role (<i>Student</i> or <i>Teacher</i>) is missing, the user will be assigned the <i>Student</i> role. The administrator can change roles in WeLib from, for example, <i>Student</i> to <i>Librarian</i> .

Managing the library

WeLib Search: These settings are managed in Quria.

WeLib stand-alone: Under **Manage the library**, the librarian can perform the following functions:

- Search by barcode
- Delete items
- Add, edit or remove loan periods
- Limit the number of renewals per loan period
- Add, edit or remove locations
- Make settings for reservations
- Make settings for reminders
- Add a customer number to be used for orders from book suppliers such as Adlibris.

Analytics

WeLib Search: Analytics are managed in Quria.

Learn more in the Quria online help: [Analytics](#)

WeLib stand-alone: It is possible to get analytics about the usage of different resources in WeLib.

You can filter analytics to see loans, renewals or all loans (loans and renewals).

Create a request in the support portal customer.hornbill.com/axiell to get access to Google Analytics for your installation.

Resources

Resources in WeLib Search

Resources are managed in Quria.

Learn more in the Quria online help: [External sources](#)

Resources in WeLib stand-alone

The librarian can add catalogue records, audio books and other resources in WeLib.

Catalogue records can be imported from various suppliers described in this table. Different providers are used for different countries. The library has to have an agreement with Bokbasen and BIBBI to be able to use these sources.

Country	Resource provider	Address
Sweden	Libris	libris.kb.se
USA	Library of Congress	catalog.loc.gov/vwebv/searchBrowse
Norway	Bokbasen	bokbasen.no
	BIBBI	bibsentr.no
Finland	Melinda	melinda.kansalliskirjasto.fi
Great Britain	Library of Congress	catalog.loc.gov/vwebv/searchBrowse
Germany	DNB	dnb.de

Note:

To be able to fetch catalogue records from other resource providers than the default provider, the configuration of your WeLib needs to be adjusted. Please contact Axiell support to add for example Library Of Congress.

Creating a resource

You can create a resource by scanning an ISBN number or by searching for a title or an author.

1. Select **Add resource**.
2. Scan the ISBN, or search for a title or an author.
If the catalogue record already exists, you will arrive at the record right away (provided that you search for ISBN from a resource provider).
3. Check that the record is accurate (e. g. correct ISBN) and fill in metadata for the catalogue record.
4. Add an image if you want to, in jpg or png format. The image can be a maximum of 20 MB. It is automatically scaled and a preview will be displayed before publishing.
5. Click **Save**.

Adding items to a catalogue record

1. Go to the catalogue record.
2. Select **Manage items**.
3. Add item: department, location, loan period, barcode.
4. Click **Save**.

Note:

If you cannot find a recently imported catalogue record, select **Show all** in the "eye" to be able to search also for catalogue records without items.

Deleting an item

Items can be deleted as long as they are not on loan.

1. Scan the barcode of the item you want to delete under **Library/Manage the library**.
2. Click **Delete**.

Items with status

In WeLib stand-alone, you can see items that belong to your own school and have a status under **Library/Items with status**.

You can set the following statuses on items:

- Ordered
- Lost

The **Ordered** status is used when ordering books from for example Adlibris. You can also add a catalogue record and set the **Ordered** status without using the acquisitions module.

See also: [WeLib stand-alone: Acquisitions](#)

Setting status on an item

1. Find the catalogue record that has one or several items for which you wish to set a status.
2. Select **Manage items**.
3. Click in the box below the **Status** heading, where it says **Select**.
You now see that you can choose between two statuses: **Ordered** and **Lost**.
4. Select the status you want to set on the items.
5. Click **Save**.

Changing status on an item

1. Select **Library/Items with status**.
2. Select one or several items in the list (to the far left) and click the edit icon at the right-hand side.
The items you have selected are displayed in a window, including information about title, barcode and status.
3. Select a different status in the list at the top of the window.
4. Click **Save**.

WeLib stand-alone: The study material module

The study material module makes it easy for teachers and librarians to manage the class sets and other study material that the school has access to. The study material module has a separate search function which makes it possible to keep study material apart from the other resources in the school library. Calendar bookings provide an overview of how the class sets will be used during the coming year. This helps teachers to plan how the study material will be allocated among the classes.

The study material module includes the following functionality:

- Teachers can add, edit and delete items that belong to catalogue records.
- Teachers and librarians can filter resources to display **All resources**, **Study material only** or **Not study material**.
- Students are prevented from finding study material (class sets) when searching.
- Teachers can book class sets using a calendar (optional functionality).

Setup and permissions

The study material module is an additional WeLib module. Axiell Support configures the settings needed for the school to get started with the study material module. The school needs to decide if bookings in calendar should be activated before the study material module is activated. If the booking functionality is not activated, then it will be possible to make reservations of study material instead.

Teachers must be granted the **Handle study material** permission in order to use the study material module. Staff with the **Local Administrator** permission can assign others the **Handle study material** permission, provided that the study material module has been activated.

Adding items to the study material module

Staff with the **Librarian** permission selects which catalogue records should be available in the study material module. We recommend that class sets are managed in the study material module to make it easier for the school to keep track of study material that is to be lent in bulk to students.

Teachers and librarians add the items that are to be included in the study material module. In addition to class sets of books, equipment such as iPads and calculators can also be included.

Searching

Teachers and librarians can search in the study material module. In addition to the **All resources**, **Study material only** or **Not study material** filters, there are other filters on the right-hand side of the page and a possibility to search the resources using free-text.

WeLib stand-alone: Acquisitions

WeLib provides an integration towards Axiell's order service. This makes it possible to fetch order items from providers such as Adlibris to stand-alone WeLib. For schools with an agreement with Adlibris, this functionality can be requested from Axiell support free of charge.

The integration to the order service requires that the **Items with status** setting is enabled in WeLib. Currently, the statuses **Ordered** and **Lost** are supported.

When you add order information in WeLib, you have to determine what type of record is ordered: **Study material** or **Library record**. For installations that include the study material module, it is recommended to use two series of order numbers - one for study material and one for library records - for the purchased items to be organized correctly in WeLib.

Adding order information

Librarians have permission to add order information.

1. Select **Manage the library / Orders**.
2. Select supplier.
3. Click **Add customer number** and fill in the school's data.
4. Select type of catalogue record.

Fetching order items

For installations that include the study material module, you have to enter the correct order number used for study material or library records respectively. The following procedure describes how to fetch an order from Adlibris.

1. Sign in to the supplier's system and fulfil your order.
2. Select **Register books** and **Create order items in WeLib**.

The records are now available in WeLib with status **Ordered**. The titles can be reserved but not but not checked out (as there are not yet any items that can be borrowed).

The order items from Adlibris may include less content than the records from Libris. In coming WeLib versions it will be possible to update the records with more specific metadata from Libris.

Registering items

When the ordered items have arrived, their barcodes need to be registered. Installations that include the study material module may have two different catalogue records for the same ISBN. Make sure to register accurately.

1. Scan the ISBN of the item to open the catalogue record. An ordered item has a barcode that looks something like this:
REPLACE_ME_2022-03-24T14:50:57.985.
2. Select the temporary barcode and scan the barcode of the item.
3. Remove the **Ordered** status.

Searching for and editing ordered items

1. Under **Manage items**, select **Items with status**.
2. Make the selections you want in the left-hand column to be able to change the status of many items in one go.

Start page

Several schools in a municipality may choose to share a common start page, but each school can also have its own start page. The start page is managed by the library administrator.

When you are signed in as the librarian, you can go to the bottom of the start page and select **Manage section** to add body text, headings, images, links, RSS feeds and dynamic lists.

A dynamic list could be a list of the most recently added books, popular titles, or specific types of books, such as easy-to-read books.

The **Ask the library** functionality makes it possible for users to ask questions and to contribute with acquisition proposals.

Managing the start page

You can adapt the content of the start page.

1. Go to the start page by clicking the logo.
2. Select **Manage this section** at the bottom of the page.
3. Add an image if you want to, in jpg or png format. The image can be a maximum of 20 MB. It is automatically scaled and a preview will be displayed before publishing.
4. Make the updates that you want to be shown on the start page.
5. Click **Save**.

Dynamic lists

You create the list by performing a filtered search in WeLib.

1. Perform a search that matches what you want to show in the dynamic list, you can for example select English and resource type book in the facets to show English titles in the dynamic list.
2. Save the URL from the search.
3. Go to the start page and select **Manage this section**.
4. Type the heading for your list, for example *English books in the library*, and paste the URL as a search query in the dynamic list.
5. Click **Save**.

RSS feeds

RSS feeds usually require a third-party supplier. You can add an RSS feed (for example to a blog or Instagram) at the right-hand side of the start page. Type the link to the RSS feed and a heading. To link to a WordPress blog, add */feed* to the end of the URL to get a link to the RSS feed. Sometimes, the owner of the blog needs to approve of sharing the blog in an RSS feed.

Ask the library

Ask the library is linked to the librarian's WeLib account. You can include a photo of the librarian or the library's logo in connection with this feature.

If an email address is connected to the account, the librarian will receive an email when someone asks a question or provides an acquisition proposal.

This service comes at an additional cost. Create a request in the support portal customer.hornbill.com/axiell to activate this functionality.

Search settings

Users search in the free text field and get suggestions of terms while searching. A combination of search criteria returns the best result.

The search can be further refined using the search facets on the right. If the person that registers the resources specifies them well, then the users will find it easy to find what they are looking for.

In addition to filtering, resources can also be sorted based on a number of parameters, for example alphabetically, on new arrivals or most liked titles.

Free text search

The free text search is performed in the following catalogue record fields:

- Title
- Author
- Subject
- Series
- Subject category/subject matter
- Description

Search facets

It is possible to sort by a number of terms in the search facets.

If the school wishes to turn off filtering, this should be done before the students start using WeLib. Create a request via the support portal customer.hornbill.com/axiell to adapt the filtering.

See also: [Filtering using search facets](#)

Sorting search results

At the top of the page you can sort the search results based on:

- "Best hit" (title and description)
- New arrivals
- Last modified
- Most liked
- Title A-Z
- Title Z-A
- Publication date (descending)
- Publication date (ascending)
- Author A-Z (currently not available for the stand-alone version of WeLib)
- Author Z-A (currently not available for the stand-alone version of WeLib)

Advanced search settings

Schools that search in WeLib as well as in an other library systems such as Quria need to know that the search differs a bit between these, and that the search results will not be identical. We sometimes get questions regarding Boolean search operators, that may be used in other backend systems. These are not used in WeLib, the search functionality isn't built that

way. When searching with two or more words, an automatic AND search is performed while the search operators NOT and OR are not available.

WeLib stand-alone: Axiell can adapt the WeLib search based on a desired search result. In that case, the school or library needs to send a specification of how results should be evaluated. Adapting search results should be done before the students start using WeLib and may come with an additional cost for the school. Create a request via the support portal customer.hornbill.com/axiell for more information about the cost for this kind of changes.

Managing users, classes and groups

WeLib Search: User accounts from the backend system are used. Once users have signed in to WeLib, they can be managed in WeLib, to, for example, create reading groups.

A librarian with Local administrator permissions can add and edit users, classes and groups. With this account, you can also help users change their passwords if they need help.

Administrating users in Quria

For WeLib installations using Quria as library system, WeLib users are fetched from Quria via the ALMA web service, and then the following applies:

- Everybody who is to sign in to WeLib needs to have a library card in Quria.
- This means that users in WeLib equals library cards in Quria, not staff users.
- Anyone that signs in to WeLib is initially assigned the role *Student*.
- To be visible in WeLib, you must sign in at least once. After that, the person with a special permission can set the correct role.

Adding users

Only a user with the Librarian role can add users.

1. Select **Library/Users/Manage users**.
2. Click **Add users** at the right-hand side.

The following information is required:

Setting	Description
User name	Enter a unique user name.
Password	Do not enter the same password for multiple users.
First name	The user sees this information in the menu after signing in.
Last name	
Email	WeLib requires email address and passwords to be unique for users and therefore either email address or personal identity number must be entered.
Personal identity number	
Role	Specify whether the user has the role of student, teacher or librarian.
Permission	The teacher and librarian roles can be assigned special permissions. See also: Roles and permissions
School	If several schools are included in your installation, then you must select the correct school for the user.

If an email address is entered, the user can receive book tips and reminders by email. Create a request in the support portal customer.hornbill.com/axiell to activate this functionality.

Users with a protected identity

All schools should have routines for students with a protected identity. In WeLib, these users can be entered with a fictitious first and last name. Users who have no personal identification number can be entered with another unique number.

Adding classes

Only a user with the Librarian role can add classes.

1. Select **Library/Users**.
Now you can manage users, groups and classes under different tabs.
2. Select **Manage classes**.

The following information is required:

- Group name
- School
- Group type - select Grade
- Description

Users in a group can be members, administrators or editors. An administrator can manage the group and make changes to the group, such as adding/removing users. An editor can share information with the group and, for example, send book tips or lists to the entire group. Usually, students are group members and teachers are editors.

Class promotions

Prior to a new academic year, a librarian with Local administrator permissions must promote classes for the new academic year. You do this by renaming the classes, e.g. from 8A to 9A. Make sure to begin with the oldest students.

Adding groups

Only a user with the Librarian role can add groups.

1. Select **Library/Users**.

Now you can manage users, groups and classes under different tabs.

2. Select **Manage groups**.




The following information is required:

- Group name
- School
- Group type - select if it is a School-wide teaching group, Subject group, Course group or Other
- Description

Users in a group can be members, administrators or editors. An administrator can manage the group and make changes to the group, such as adding/removing users. An editor can share information with the group and, for example, send book tips or lists to the entire group. Usually, students are group members and teachers are editors.

Creating, editing and deleting users, classes or groups

The buttons below are used to handle users, classes and groups.

	Click the add button to create subgroups. The advantage of creating a subgroup instead of a new group is that the subgroup is given the same users as the parent group. This allows you to quickly create new groups from an existing class, for example.
	Click the edit button to edit information about users, classes or groups. You can also use this tool to help users to change passwords, for example.
	Click the delete button to delete a user or group. When a user or group is deleted, this cannot be undone. Deleting a group will not delete users in the group but only the group. You cannot delete a user if the user has ongoing loans.

Reminders

WeLib stand-alone: Reminders can be sent manually or automatically.

WeLib Search: Reminders are managed in the library system.

Reminders in WeLib stand-alone

Note:

If you make changes such as number of days for any of the reminders, the new settings will only take effect for books that are lent after the changes.

Configuring automatic reminders

When all settings below are made, reminders from WeLib will automatically be sent every night. A maximum of three reminders will be sent.

1. Select **Library/Manage the library/Reminders**.
2. Select school, email sender, message to send and the number of days (an interval) for reminders.
3. Compose a message. You can enter any text and if you want to, you can use variables inside brackets to automatically fill in the name of the user and the title of the book. Example of message:
Hello {name},
Your book, {title}, is delayed. Please return to the library.
/The library

For an overview of sent reminders, select **Library/Manage loans/Reminders**.

Sending a manual reminder

Create a request in the support portal customer.hornbill.com/axiell to activate this functionality.

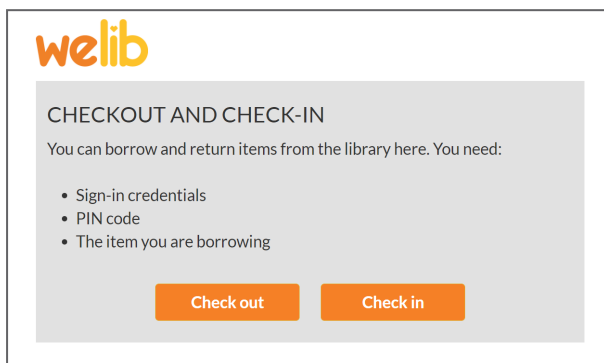
1. Select **Library/Manage loans/Send reminder**.

Users signed in to WeLib will receive a notification in the WeLib (letter icon in the top right-hand corner) of the overdue loan. If the user who has been sent a reminder is not signed in, they will receive an email notification, provided that their email address has been entered into WeLib.

Self-service

Self-service is an additional service in WeLib. Please contact Axiell to order this functionality. Users can use self-service to check out and check in library items themselves.

The self-service functionality in WeLib has to be activated in the computers or tablets to be used for self-service.



Activating self-service on a computer or tablet

Self-service is activated using a cookie that is saved in the web browser. The cookie controls the self-service functionality.

Follow the steps below to activate self-service on a computer or tablet:

1. Sign in to your WeLib, as a librarian.
2. In the **Library** menu, click **Activate self-service**.
3. On the **Install self-service** page, you can make the following settings:
 - Allow checkout and check-in, checkout only or check-in only.
 - Print receipts on a Windows printer (does not work with receipt printers).
 - Enter how long time (in seconds) before the user is signed out automatically.
4. Make your settings and click **Save and sign out**.

Self-service can now be accessed using the following address: <https://XXX.welib.se/#/kiosk> where the three X:s are replaced with the address of your WeLib.

5. Make this address the browser start page of the computer or tablet that will be used for self-service.

WeLib Search: Self-service in WeLib with Quria

The self-service functionality needs a system user in the system of the school where self-service will be used. If your installation includes several schools that will use self-service, then each school needs a separate system user.

Once you inform Axiell support about which system user to use, Axiell will make sure to activate checkout and check-in in your WeLib.

Cookies

WeLib stand-alone: It is possible to activate self-service without saving a cookie in the web browser. Please contact Axiell support for further information.

WeLib stand-alone: External sources

This service comes at an additional cost.

The external sources can be open/free of charge or require payment.

Search in external sources are performed in a new window. The search query is included for some sources, but not for all.

The school is responsible for granting Axiell access to the correct link to external sources. Use the support portal customer.hornbill.com/axiell to inform Axiell about which link to add.

If an external source no longer works as before, then the provider of the source may have made changes. In this case, the school is responsible of informing Axiell.

Axiell's responsibility

When one of Axiell's installations informs that a link no longer works, other installations can be affected as well. If Axiell receives support cases about errors in external sources that several installations use in their WeLib installations, then we will replace these links for all users. This only applies for external sources that are not dependant on signing in from the school network - in these cases, the school must supply Axiell with the correct link.

SSO towards external sources

Some sources can be made available using existing credentials (Single Sign-On). This requires that the school signs in to WeLib using a service for joint signing in, for example Google. The source also needs to support this.

Create a request in the support portal customer.hornbill.com/axiell for assistance with SSO towards external sources.

Other

Receipts

Receipts can be printed on a regular printer.

Scanners and labels

The school can purchase labels and scanners in Axiell's web shop: shop.axiell.com

Help and support

Support information is available for WeLib users under **Name/Help**. New features are always displayed under **Help**. If you cannot find the answer to your question, the library administrator can open a support ticket in the support portal customer.hornbill.com/axiell.

GDPR/integrity policy

WeLib is continuously developed to meet the GDPR (General Data Protection Regulation) requirements. A Data Protection Agreement (DPA) for the contract owner and Axiell has been signed.

Personal data in WeLib

Axiell is the Data Processor in WeLib and the contract owner is Data Controller. The Data Controller is responsible for all personal data in Axiell's services.

Personal data handled in WeLib:

- Users' personal data in the form of names, social security numbers, email addresses and mobile numbers on behalf of the person responsible for personal data who performs the exercise of authority.
- Metadata for loans is collected and provides a basis for analytics. Analytics are anonymized and will not be linked to borrowers.
- Only authorized staff have access to lists of ongoing loans. When the loans are returned, it is no longer possible to see which loans a user has had. It is possible to control school staff permissions so that only librarians can see ongoing loans at one school, or at many schools.
- Personal data such as images, texts, reviews, e-books, audiobooks, videos and lists that have been registered under consent given by users, can be published.

In WeLib, the school's images, texts, reviews, e-books, audiobooks, videos and lists can be published so that they are publicly searchable also outside of the school. The library system can be configured so that teachers and librarians can publish publicly directly, while students' publications must be approved by a teacher or librarian. It is also possible to turn off public publishing completely. In this case, publication will only be made privately/to a selected group.

The Data Controller is responsible for obtaining consent of guardians and students before publication. They have the right to know why the publication is made and to have any published files and texts deleted from the service when they wish.

Deleting users and content

Axiell's services have GDPR-adapted routines for securely handling and deleting personal data.

The Data Controller will manually or automatically update school registers in WeLib.

Manually created accounts can be added, edited and deleted by users with permission as **Local Administrator**.

Automatically updated school registers add, edit and delete accounts when the Data Controller updates the registers.

Accounts with ongoing loans cannot be deleted. Return the loans and then delete the account.

When the accounts are deleted, all private and public data (reviews, e-books, audiobooks, videos and lists) will be deleted.

Reviews, e-books, audiobooks, videos and lists can be edited and deleted by a teacher or librarian with permission to edit and delete those resources.

When the Data Controller terminates the contract all data in WeLib will be deleted.

Newsletters and social media

Please follow Axiell's newsletter for information about what we're working on, for example, new features in WeLib. Check out the WeLib website too: [WeLib](#)

Cookies used in WeLib

What is a cookie?

A cookie is a small text file that is saved in your computer when you visit a website that uses cookies. There are two types of cookies:

- A persistent cookie that saves a file in your computer during a longer period of time. In this kind of cookie, it is stated how long the text file is preserved in your computer.
- A session-based cookie that is saved in the memory of your computer only temporary, while you are visiting a website. It is erased when you close your web browser.

What are cookies used for?

Cookies can contain information about what settings you have made, so that when you visit same website again, you don't need to make the settings again. The cookie informs the website that the visitor has been on the website before, and about which settings were made then. If you update your settings, the existing cookie is replaced with a new one. This means that cookies are used to make it easier for you when you visit a specific website.

WeLib cookies

WeLib uses cookies and **Web Storage** to store information, mainly about the ongoing session.

Cookies

WeLib stores information about cookie approval and settings for computers used as self-service kiosks.

Web Storage

This type of storage is divided into Local Storage and Session Storage.

Local Storage

This mainly consists of non-personal information about the website in order for WeLib to perform faster since the same information will not need to be loaded repeatedly, for example information about which schools, departments and sections that exist. If the user has selected to show only one school, this is also stored. When a user signs in, a sign in token is stored in order for WeLib to know who loads data in the coming API request. This information is cleared when the user signs out or after a certain period of time.

Session Storage

This is where the user's settings and searches are stored, for example search queries, filter settings and additional data related to this. All this information is cleared when the user signs out or closes WeLib.

Third party cookies

WeLib uses Google Analytics to measure how users interact with the website content.

Cookie	Purpose
_ga	Creates a unique ID used to generate statistics about how the visitor uses the website.
_gat	Used to regulate number of requests
_gid	Creates a unique ID used to generate statistics about how the visitor uses the website.

If you do not want your WeLib visits to be shown in Google Analytics' statistics, you can add opt-out add-ons to your browser.

See also: developers.google.com/analytics/devguides/collection/analyticsjs/cookie-usage

Preventing storing of cookies

If you do not want cookies stored on your computer, you can switch off the cookie function in safety settings in your web browser. No cookies will then be stored, but this also means that you will not be able to use all functions on the web site. You can read more about how to deny storing of cookies in the user documentation for your web browser.