

# WeLib user guide





# Table of contents

Preface	4
About this guide	4
WeLib concepts	. 5
Search, find and discover	. 5
My page	5
The Wellibucer interfece	
	. 0
Search	7
My page	8
Editing personal information	8
Renewals Reservations	. 8
Collections on My page	. 8
Self-published resources	8 8
Secondary works	. 8
Checking out and checking in resources (stand-alone WeLib)	. 9
Checking out a book	. 9
Checking in a book	. 9
Posonyations	11
Managing reservations (stand-alone Wellih)	11
Reservations in My page	. 12
Collections	.13
Creating a collection	. 13
Adding a resource to a collection	. 13
Reviews	14
Managing reviews	14
Liking and sharing resources	.15
Liking a title	.15 15
Self-publishing	16
Managing self-publishing	16
I ne secondary work module	. 16
Configuration of WeLib	17
Stand-alone WeLib	17
WeLib with OpenGalaxy or Spark	.18
Filtering using search facets	. 19

Roles and permissions	20
Student	
Teacher	
Signing in and user accounts	
About signing in	
Creating accounts	
Forgotten password	
Single sign-on (SSO)	
Managing the library (stand-alone WeLib)	25
Statistics (stand-alone WeLib)	
Resources (stand-alone WeLib)	
Creating a resource	
Adding items to a catalogue record	
Deleting an item	
Start page	
Managing the start page	
Search settings	29
Free text search	
Search facets	
Advanced search settings	
Managing users, classes and groups	31
Adding users	
Adding classes	
Adding groups	
Creating, editing and deleting users, classes or groups	
Reminders	
Configuring automatic reminders (stand-alone WeLib)	
Sending a manual reminder (stand-alone WeLib)	
Self-service	34
External sources	35
SSO towards external sources	
Other	
Receipts	
Scanners and labels	
Help and support	
Newsletters and social media	

# 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 patrons.

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. The guide covers functionality for installations with stand-alone WeLib as well as for WeLib as a frontend system to public libraries (such as OpenGalaxy or Spark). Different functionality is available depending on the customer setup.

# WeLib concepts

### Search, find and discover

WeLib makes digital and physical resources from a variety of sources searchable.

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

Teachers and librarians can connect all resources to the subject-specific goals in the curriculum, which gives teachers as well as librarians a possibility to offer students a clear structure and deeper understanding for the assignments you give them.

# 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. Users can also collect personal digital resources on My page, which can be labelled and shared via the Collections tool.

### Tools

WeLib includes customised tools for each role - students, teachers and librarians. Each role in the service has 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 to each other. Teachers and librarians can also send messages to an entire class and to groups that have been created in WeLib. Reminders can be sent manually by the librarian, or automatically.

# The WeLib user interface

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.



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, for example by using this tool, that shows the keyboard shortcuts specific for your browser: www.rensacachen.nu

# 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. If the school has added e-books or audio books, this is where you will see the books you have opened.

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 e-mail address and phone number.
- Select Change password to change the password The librarian 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.

#### Renewals

On My page, you can renew ongoing loans. If a book can be renewed, you can choose Reloan 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

#### Self-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

#### Secondary works

If the school has a contract for upper secondary diploma projects, users will see their diploma project on My page.

See also: Secondary works

# Checking out and checking in resources (stand-alone WeLib)

If the school uses the self-service functionality, you can check out and check in resources yourself. Depending on how the system has been configured, you can also check out and check in resources after signing in to WeLib. Teachers and librarians can check out and check in for others.

#### Checking out a book

- 1. Select Check out book.
- 2. Scan the barcode of the book.

#### Checking in a book

- 1. Select Check in book.
- 2. Scan the barcode of the book

#### Managing loans

Depending on how the system has been configured, students can check out and check in resources after signing in to WeLib. Teachers and librarians can check out and check in resources for others. Students can also check out and check in using self-service.

Only a person with librarian permission can see the students' loans.

#### Checking out and checking in for others

- 1. Select Check out book or Check in book respectively.
- 2. Find the student.
- 3. Scan the barcode of the book.

#### Checking out when WeLib is connected to OpenGalaxy or Spark

A student can sign in to WeLib and check out a book (if the system has been configured for checkouts). When a librarian needs to check out books to a student, the checkout will be done in OpenGalaxy or Spark.

#### Overview of loans

Note:

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

Select Library/Manage 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 books 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 the loan period

1. Select Extend loan to extend the loan by a further 28 days. You can also set a fixed due date.

#### Checking in manually

1. Select **Check in manually** when a student 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 student a reminder that it is time to return the resource.

# Reservations

You need to sign into WeLib to make a reservation. Titles on loan can be reserved from the search results or from the catalogue entry. Librarians can make reservations for others.

- 1. Search for the title you want to reserve.
- Click Reserve.
   In the window that opens, you can make a reservation for yourself or for someone else.
- 3. Select a user or make the reservation for yourself.
- 4. Click Reserve and OK.

When the title is returned to the library, the librarian will notify you that the title is ready to be picked up.

### Managing reservations (stand-alone WeLib)

For installations with other backend systems (OpenGalaxy or Spark), reservations are managed in the backend system.

It's possible to reserve books on loan as well as books 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 that 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.

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/Reservation.
- 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 books 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 notification to user about trapped book

- Scan or type the barcode of the title that is checked in.
   A message about the title being reserved is shown temporarily. The same message is found under **Returned books**.
- 2. Place the title on the reservation shelf.
- 3. Select Library/Manage reservations.

The book 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 user who got the notification.

#### Reserving a book on the library shelf

Reservation of a book on a shelf in the library is made similarly to reservation of a book 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.
- Select Library/Manage reservations. The book has status On shelf. An email is sent to the address entered under Library/Manage the library/Reservation.
- 6. The librarian fetches the book 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 a book 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 user who got the notification.

#### Overview of reservations

1. Select Library/Manage 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 the title is ready for pick-up.
	Edit	Update a reservation with new information, such as editing the item number.
$\square$	Send reminder	Remind the user about a reservation.
₽	Print	Print the reservation list (using the web browser print functionality).
圃	Remove	Remove a title from the reservation list.

#### Reservations in My page

My page provides information about the status of the reservations that have been made. Users see when reserved books 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.

# 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 collections can be searched using filters and users can follow these collections. Private collections can be shared with selected people, classes or groups

A URL to a collection can be sent in email or be placed on the schools learning platform.

### 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 keep in the collection and select Add to collection.

#### Adding a resource to a collection

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

You can also scan the item directly into your collection, if the book 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, you can write a review about a title that you have read.

- 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.

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

You find Handle self-publishing in the name menu.

You 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 students that should be able to add content to WeLib.

- 1. Select Self-publishing 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 self-publishing

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

You find Handle self-publishing in the name menu.

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

### The secondary work module

The secondary work module makes it possible to publish and archive student works, and for others to search for these. The students upload the works themselves and assign them to the teachers that are to approve and archive the works. The teacher can publish the work right away or send it back to the student.

Use the support portal customer.hornbill.com/axiell if you want to order the secondary work module.

#### Secondary works

Secondary works can be published and possible to search for in WeLib, provided that the secondary work module has been activated for the school.

To upload a secondary work:

- 1. Select Name/Secondary work/Self-publishing.
- 2. Complete the form and upload the file.
- 3. Select which teacher or librarian is to approve the project.
- 4. Click Save.

The teacher or librarian gets a notification that there is a project to approve. The file is either approved and published, or sent back to you for additional work. You get a notification when the teacher or librarian has made an assessment.

# **Configuration of WeLib**

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.

#### Stand-alone WeLib

#### **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.
Messages in WeLib	On	No	Can be deactivated.
Messages in WeLib sent as email	On	No	Requires that the users have email addresses registered in their accounts. Can be deactivated.
Update details on My page	On	No	Can be deactivated.
Change password on My page	On	No	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	
Item statuses	Off	No	Possibility to add statuses such as On order or Lost.
Fixed loan periods	Off	No	For installations with several schools.
Secondary works	Off	Yes	
Contact form on the start page	Off	Yes	
Self-service	Off	Yes	
Learning resources module	Off	Yes	

#### Settings for students

Functionality	Default setting	Additional cost	Comment
Students can borrow themselves	Off	No	
Self-publishing	Off	No	
Publicreviews	Off	No	Students' reviews become private as default.
Public collections	Off	No	Students' 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 collections and more with all classes at the school.
Handle self-publishing	On	No	Teachers can review students' self-published works and reviews. Requires an extra permission: Approve selfpub.
Learning resources module:	Off	Yes	Requires the Learning resources module and an extra per-

Functionality	Default setting	Additional cost	Comment
handle loans and add items to catalogue records			mission: Handle learning resources.

# 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 self-publishing	On	No	Librarians can audit students' self-published works and reviews. Requires an extra permission: Approve selfpub.

# WeLib with OpenGalaxy or Spark

### General settings

Functionality	Default set- ting	Additional cost	Comment
Collections	On	No	Can be deactivated.
Collections can be connected a selec- ted school	On	No	Can be deactivated.
Reviews	On	No	Can be deactivated.
Share function	On	No	Can be deactivated.
Update details on My page	Off	No	
Change password on My page	Off	No	
Messages in WeLib	Off	No	
Messages in WeLib sent as email	Off	No	Requires that the users have email addresses registered in their accounts.
Contact form on the start page	Off	Yes	
Secondary works	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	
Publicreviews	Off	No	Students' reviews become private as default.
Public collections	Off	No	Students' collections become private as default.

### Settings for teachers

Functionality	Default setting	Additional cost	Comment
Check-in	On	No	Can be deactivated.
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 collections and more with all classes at the school.
Handle self-publishing	On	No	Teachers can review students' self-published works and reviews. Requires an extra permission: Approve selfpub.

#### Settings for librarians

Functionality	Default setting	Additional cost	Comment
Check-in	On	No	
Administrate users	On	No	Requires an extra permission: Local administrator.
Handle and remove oth- ers' collections	On	No	Requires an extra permission: Edit collection.
Handle self-publishing	On	No	Librarians can audit students' self-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:

- Department (select a school in order to see departments)
- Author
- Genre
- Shelf mark (you can select to show SAB and/or Dewey)
- Source
- Resource type (media type)
- Target group
- Location
- Series
- School
- Language
- Publication year
- Subject
- Subject area
- 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.

# **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 self-publication from students
	Handle learning resources	Permission to add items for learning resources and make settings for these.
Librarian	Local administrator	Permission to administrate users in WeLib
	Approve selfpub	Permission to approve self-publication from students
	Edit collection	Permission to remove others' collections

#### 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 different pedagogical 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
- Take part of students' reading and learning
- Publish files
- Create collection based on different pedagogical resources
- Share collections with others
- · Follow others' collections
- Approval of self-publication (special permission)
- Handle learning resources (special permission).

#### Librarian

A librarian can work with the following tasks:

- Adding school material in WeLib
- Manage circulation (loans, reservations etc.)
- Manage the start page
- Manage the library (loan periods, reservations and locations)
- Introduce the school library into a knowledge context

- User administration (special permission)
- Approval of self-publication (special permission)
- Management and removal of others' collections (special permission)

# 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

Axiell can add WeLib users for you. This service comes at an additional cost to the school. Users sign in with a user name and password to borrow resources. A popular solution is to allow users to use federated log-in, such as Google or Microsoft accounts.

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

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. The Reset password functionality makes it possible of 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 in WeLib. Currently, signing in via Google, Skolfederationen and Microsoft Office 365 is supported. Enabling single sign-on for your WeLib installation comes with 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:

- 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]
ACSURL	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.
- Export a SAML metadata file (xml) and send this to Axiell support. The user name/ID + social security number is sufficient, preferably using one of these attribute names: User name: urn:oid:1.3.6.1.4.1.5923.1.1.1.6 or eduPersonPrincipalName or username or id

Social security number: urn:oid:1.3.6.1.4.1.2428.90.1.5 or norEduPersonNIN or Personnummer 12

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.
- 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 acounts, 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 signon.

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

Single sign-on for WeLib schools with OpenGalaxy or Spark 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
	urn:oid:1.3.6.1.4.1.5923.1.1.1.6 or	
User name	eduPersonPrincipalName or user-	
	name or id	
Given	urn:oid:2.5.4.42 or givenName or For-	
name	namn	
Surname	urn:oid:2.5.4.4 or surName or sn or	

Attribute	Value	Comment
	Efternamn	
Email	urn:oid:0.9.2342.19200300.100.1.3 or mail	
School unit code	<i>urn:oid:1.2.752.194.10.2.4</i> or <i>sis-</i> <i>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 solu- tions if it is not possible to send a school unit code.
Role	urn:oid:1.3.6.1.4.1.5923.1.1.1.7 or eduPersonEntitlement	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 (stand-alone WeLib)

For installations with other backend systems (OpenGalaxy or Spark), these settings are managed in the backend system. 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

#### Statistics (stand-alone WeLib)

For installations with other backend systems (OpenGalaxy or Spark), statistics are managed in the backend system.

It is possible to get statistics about the usage of different resources in WeLib.

You can filter statistics 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 (stand-alone WeLib)**

For installations with other backend systems (OpenGalaxy or Spark), resources are managed in the backend system.

The librarian can add catalogue records, e-books, 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.

Country	Resource provider	Address
Sweden	Libris	libris.kb.se
USA	Library of Congress	catalog.loc.gov/vwebv/searchBrowse
	Bokbasen (May 2021)	bokbasen.no
Norway	BIBBI	bibsent.no
Finland	Melinda (May 2021)	melinda.kansalliskirjasto.fi
Great Britain	Library of Congress	catalog.loc.gov/vwebv/searchBrowse
Germany	DNB	dnb.de

#### 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.
- 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.
- 6. Select Edit.
- 7. Add item: department, localisation, loan period and barcode.
- 8. Click Save.

#### Adding items to a catalogue record

- 1. Go to the catalogue record.
- 2. Select Edit.
- 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.
- 2. Click Delete item.

# Learning resources (stand-alone WeLib)

The learning resources module comes at an additional cost. Create a request in the support portal **customer.hornbill.com/axiell** to order this functionality.

When resources are added, these can be marked as learning resources. They will then become searchable as learning resources for teachers and librarians. A banner on the cover image and on the catalogue record indicates that the resource has been marked as a learning resource.

Only librarians can add catalogue records.

For teachers to be able to handle learning resources, and for example add new items, the special permission Handle learning resources is required. This permission is granted by a librarian with Local administrator permission.

#### Handling items

A librarian has to import the catalogue record into WeLib first of all.

- 1. To show a recently imported catalogue record, select **Show all** in the "eye". This will make it possible to search also for catalogue records without items.
- 2. Search for the book by selecting Learning resources only under More search options Content and typing the title of the book in the search field.
- 3. Select **Handle item** directly from the search results. Alternatively, open the catalogue record and select **Handle item** from there. Enter the following:

Setting	Description	
Unit	The school/schools you belong to in WeLib	
Department	One or several to choose from	
Location	The physical location of the book	
Loan period	If you want to, you can enter a different loan period for learning resources	
Barcode	This is where you scan a unique barcode for each item (you have already labelled the book with this	
	barcode)	

#### Filtering on learning resources

You can filteron on learning resources only under **More search options**. This functionality is always visible for librarians and teachers. It is not visible for students.

# 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 WeLib 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 righthand 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 e-mail address is connected to the account, the librarian will receive an e-mail when someone asks a question or provides an acquisition proposal.

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 backend systems such as OpenGalaxy or Spark 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.

Axiell 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

Installations with other backend systems (OpenGalaxy or Spark) use user accounts from the backend system. Once users have signed in to WeLib, they can be managed in the same way as users in stand-alone 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 students change their passwords if they need help.

#### Adding users

Only a user with the Librarian role can add users.

- 1. Select Library/Client administration/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 logging in.	
Last name		
E-mail	Well ib required a mail address and persuarda to be upique for usars and therefore either a mail addre	
Personal identity	or personal identity number must be entered.	
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 e-mail address is entered, the user can receive book tips and reminders by e-mail. Create a request in the support portal customer.hornbill.com/axiell to activate this functionality.

#### Students with a protected identity

All schools/municipalities should have routines for students with a protected identity. In WeLib, these students 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/Client administration/Manage groups.
- 2. Click Add group at the right-hand side.

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 (functionality for this will be available shortly). An editor can share information with the group and, for example, send book tips or collections to the entire group. Usually, students are group members and teachers are editors and/or administrators.

#### **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

- 1. Select Library/Client administration/Manage groups.
- 2. Click Add group at the right-hand side.

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 (functionality for this will be available shortly). An editor can share information with the group and, for example, send book tips or collections to the entire group. Usually, students are group members and teachers are editors and/or administrators.

### Creating, editing and deleting users, classes or groups

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



# Reminders

Reminders can be sent manually or automatically in stand-alone WeLib. For installations with other backend systems (OpenGalaxy or Spark), reminders are sent from the backend system to My page.

#### 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 (stand-alone WeLib)

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 student 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 (stand-alone WeLib)

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

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

Students 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 student who has been sent a reminder is not signed in, they will receive an e-mail notification, provided that their e-mail address has been entered into WeLib.

### Reminders for WeLib with other backend systems

For users with other backend systems (OpenGalaxy or Spark), reminders are sent from the backend system directly to the students.

# Self-service

Students can use self-service to check out and check in library books themselves. This functionality can be ordered for the school library. It is easily installed locally on a computer or tablet. Instructions for setting up self-service will be provided when you order this option.

welib
LOAN AND RETURN Here you can borrow and return library books. You will need:
<ul> <li>Borrowing card</li> <li>PIN</li> <li>The book you're borrowing</li> </ul>
Loan Return

# **External sources**

These services are not included in the cost for WeLib.

The school can include sources that can be searched directly in WeLib, such as the library catalogue, some video services, open teaching resources and digital services for which the school has an agreement. The school can also use external sources in WeLib.. 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 dependent 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 logs 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/sv

# Help and support

Films and other support information are available for WeLib users under **Name/Help**. The help that is available differs depending on whether the user is a student, teacher or library administrator. 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

All data handled in Axiell's services complies with the Swedish Data Protection Authority's guidelines.

Axiell and the school/municipality have signed a personal data agreement.

#### Personal data in WeLib

In WeLib, students' and teachers' eBooks, videos and more can be published and made possible to search for by anyone. The school/municipality is responsible for obtaining consent from guardians and students before publishing. They have the right to know why the publication is made and to have their published works deleted from the service when they want it. Axiell's services include routines adapted for GDPR to handle and remove personal data in a secure manner. The following personal data is handled in our school library services:

- Personal data: names, social security numbers, email addresses and phone numbers
- Images, texts and other additional pieces of personal data that have been registered in agreement with users

#### Removal of users and resources

A person with Local administrator permission can delete user accounts in WeLib. The user accounts are to be deleted when users no longer have reason to sign in to the service. Users with loans cannot be removed. Once the loans are retuned, the user account can be deleted.

When a user has been removed, their public and private reviews, self-published resources and collections are deleted too. Create a request in the support portal customer.hornbill.com/axiell if your school wants to order a service to keep such resources.

Reviews, self-published resources and collections can be deleted by a librarian with permission to delete resources.

### Newsletters and social media

Please follow our newsletter for information about what we're working on, for example, new features in WeLib. Axiell and WeLib are active on Facebook and Instagram. Please follow us!