Quria user guide

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Preface

Quria is a cloud-based, digital-first Library Services Platform, designed to facilitate the transformation of the modern public library.

Staff user friendly

A library system should make library work easier. A good system makes staff daily work straightforward and intuitive, without adding extra steps or demanding attention.

Get to know Axiell

We provide innovative solutions and services for public libraries that facilitate the role librarians play in stimulating reading, life-long learning and community services for citizens.

See also: **www.axiell.com**

Getting started

This section is a good starting place when you are to use Quria for the first time.

Other sections describe common functions and system configuration.

Conceptual model - Collections

The vocabulary in Quria is based on IFLA's bibliographical conceptual model FRBR (Functional Requirements for Bibliographic Records) and its successors: ifla.org/g/cataloguing/ifla-s-bibliographic-conceptual-models

This means that we do not use the terms *Catalogue records* or *Catalogue* in Quria. The terms used are *Metadata* and *Collections*.

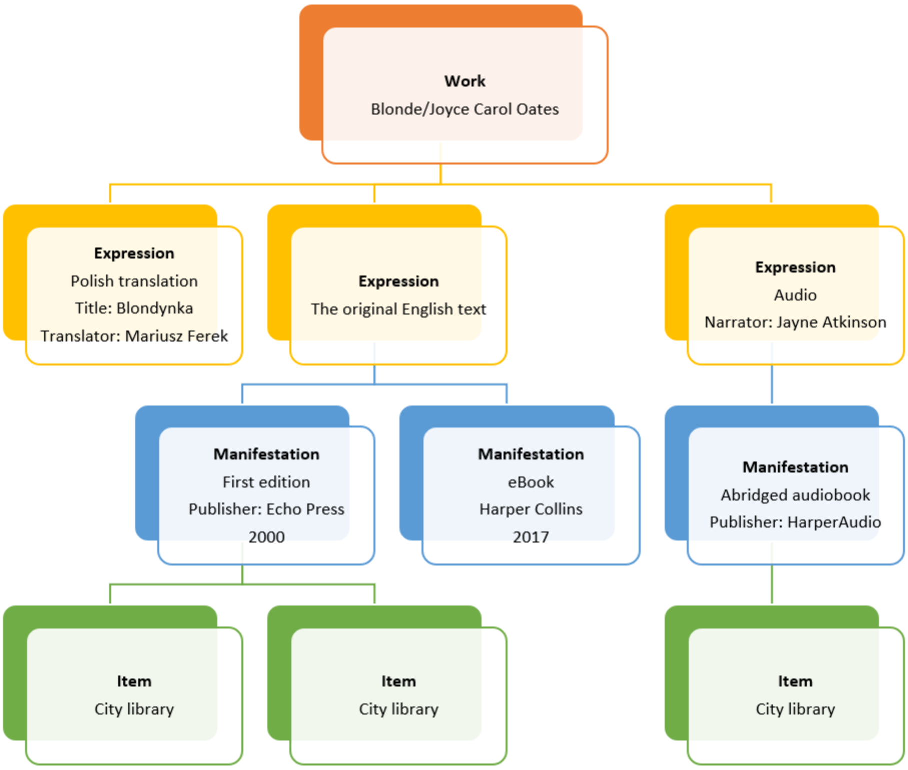
Quria's presentation of the collections also follow the entities of the FRBR model: work, expression, manifestation, item and the relations between these entities.

Works, expressions and manifestations

Works, expressions, manifestations and items are different levels of bibliographical information.

A work can have several expressions, an expression several manifestations, and a manifestation several items. Information connected to the upper levels are inherited by the lower levels.

The different levels are displayed in the example below:



Work

The work is the most abstract level; the intellectual or artistic creation. Since the work is abstract, there is no individual material object that can be said to be the work.

Metadata/bibliographical information, for example **Creator**, **Work title** (original title), **Subject** and **Classification** belongs to the work.

Please note that the work title should always be the title in the language in which the work was created.

It may be good to know that adaptation from one literary or artistic form to another (such as dramatisation of a novel or adaptation of a novel to a movie) is to be considered as a new work and not as an expression.

Expression

The expression is the intellectual or artistic form that the work gets each time it is realised. The expression is also abstract, and there is no individual material object that can be said to be the expression.

The form represents a significant part of what distinguishes the expression. Because of this, every alteration of the form (for example from text to speech) results in a new expression. In Quria, we use the concepts **Read it**, **Listen to it**, **View it** and **Touch it** as different forms of expressions.

Alteration in language (for example translation from one language to another) similarly results in new expressions.

Translation from one language to another, musical arrangements, different dubbing or subtitled versions of a movie are, according to FRBR, considered as different expressions of one and the same work.

It may be good to know that contributors that are of importance of the expression, such as translators or narrators, belong to the expression and are to be entered on this level.

Manifestation

A manifestation is the physical embodiment of an expression.

Manifestation types are used in Quria to describe the physical form of the manifestation.

Each edition of a title is a specific manifestation. This means that all information related to the specific manifestation, such as publication information, year, ISBN, extent and duration belong to the manifestation.

Note that subtitles and series information also belong to the manifestation.

Item

The item is the individual representation of a manifestation, that is, the physical object.

Information about location, loan status, item type and item number belongs to the item.

Signing in and signing out

Quria supports signing in via providers such as Google or Azure. Users need to be entered in Quria prior to signing in.

Signing in using Google

1. Make sure you are not signed in to Google.
2. Go to your Quria site URL.

3. Click **Sign in with Google**.
   If you have a Google account from before, a **Choose an account** dialog opens. Click your Quria account or click **Add account** if this is your first sign-in to Quria.
4. Sign in with your Quria credentials; email and password.
5. Click **Allow offline**.

Signing in using Azure

1. Go to your Quria site URL.
2. Click **Sign in with Azure**.
   If you are already signed in to Azure, you are automatically signed in to Quria as well.
3. If you were not signed in to Azure already, sign in with your credentials; email and password.

Signing out

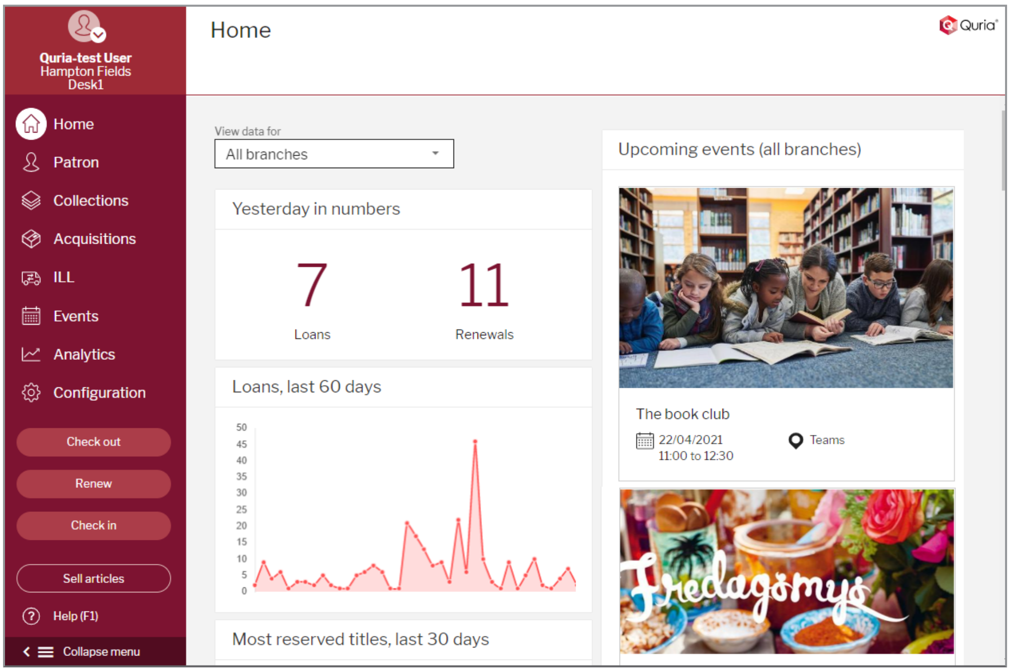
You sign out from the user menu in the top left corner.

- Click the user menu and select **Sign out** in the dropdown menu.

The Quria user interface

The Home page

When you sign in to Quria, you arrive at the **Home** page, where you can see some statistics about your library and a list of events that take place and end in the coming two weeks. You can switch to another user at the top left.



The main menu at the left contains all sections that you have access to. Different users have access to different sections, and the functionality within each section is controlled by permissions.

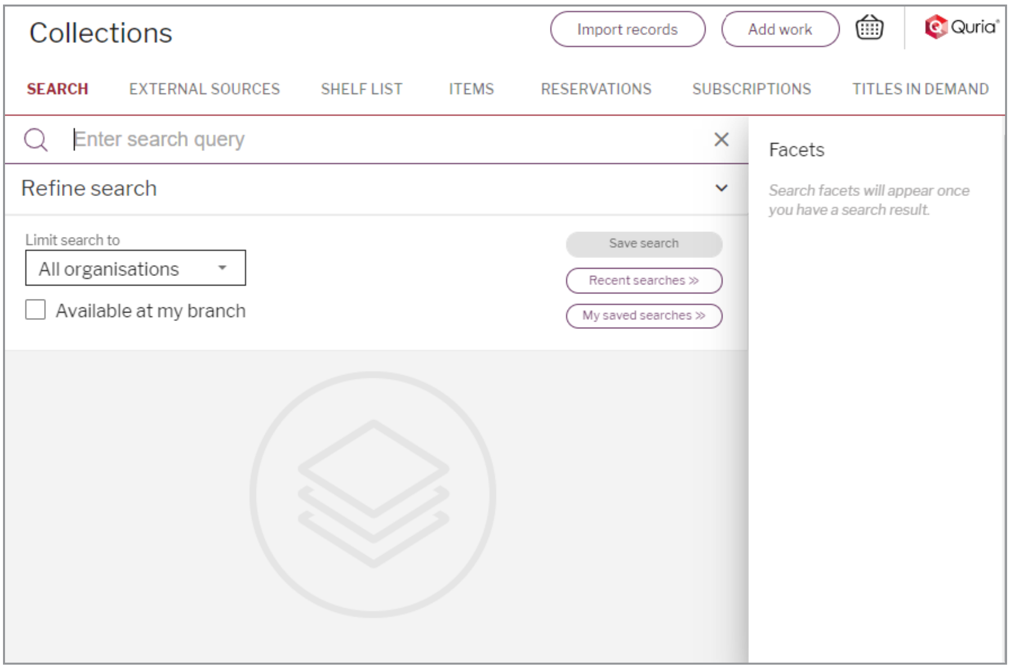
Section	Description
Home	The page that opens when you sign in to Quria
Patron	You can administrate anything related to patrons and cards from the **Patron** section.
Collections	The **Collections** section connects you to the collection of all the items and electronic resources in your library. You can for example search for items, work with reservations on the shelf list and add new records to the collection.
Acquisitions	In the **Acquisitions** section, you can search for orders and for example print labels and set location for items in a specific order. You can also administrate suppliers.
ILL	You can manage loans to and from other libraries in the **ILL** section. You can search for items coming into or leaving your library, and search for associated libraries.
Events	In the **Events** section you can administer and search for events that take place in the library, such as author readings, workshops and community events.
Analytics	You can view and create statistical reports about many different aspects of library usage in the Analytics section.
Configuration	In the **Configuration** section, you can make settings for Quria to reflect your library organisation, including rules. You can also configure users, roles and permissions. This is also where you set up printers and other devices.
Check out	In the **Check out** window, you scan patron cards or search for patrons and then scan the items they want to borrow.
Renew	In the **Renew** window, you can easily extend loans for patrons.
Check in	When items are returned to the library, you scan them in the **Check in** window.
Sell articles	You can handle selling of for example pens or printouts that the library has for sale by clicking **Sell articles**.

When you have familiarized yourself with the options in the main menu, you can collapse it to expand your work area. Tooltips appear as you hover over the icons.

See also: List of all permissions/roles

Interacting with the Quria user interface

When you open different windows in Quria, many times you are first presented with a search input field.



To get a list of all items, type an asterisk in the search field and press **Enter**. Even when you perform a more limited search, a list with many items, for example library items, patrons or orders, is often returned. You can browse through pages of search hits using the arrows at the bottom of the screen.

When you click an item in the search result list, a summary opens. As you may want to explore the item you selected more and work with it, you can use the expand button and the context menu.

Button	Description
Expand	Clicking the expand button displays the details of the selected item. Clicking the button once more collapses the details again.
Context menu	Clicking the context menu shows you all the actions you can perform on the selected item, such as renewing, editing, adding or deleting.

See also: **Searching the collection**, **Searching for a patron** and **Searching for an order**

Working with Quria in multiple tabs

Quria uses cookies to maintain high performance and a good user experience. The cookies are general and not per browser tab. This means that if you open several browser tabs in the same session and change for example organisation in one tab, this will impact all the other tabs too. If you need to work in different organisations/accounts/branches in parallel, it can be helpful to open one incognito browser session for each organisational unit, or to open another browser, e.g. one Google Chrome and one Mozilla Firefox.

Note:
It is recommended to limit the number of simultaneously open browser tabs to avoid loss of performance and impact of the general behaviour of Quria.

Available languages

Currently, the following languages are supported in the Quria user interface.

- English
- Czech

- Finnish
- French
- German
- Norwegian Bokmål
- Slovak
- Swedish

User settings according to the ISO standard determine which language is displayed for each user.

Temporarily changing the user interface language

If you want to temporarily change the user interface language in Quria, to for example work with someone that has a better understanding for another language that is supported in Quria, you can click the arrow under the user profile icon at the top left and select **Change language**. Date formats will also be displayed according to the selected language. Next time you sign in to Quria, the user interface will be displayed in the language that has been set for your user.

See also: User interface languages

Quria keyboard shortcuts

To quickly access all possible navigation actions and navigation options in different windows, you can press **Alt** + **.** (full stop/dot key) in Windows or **Control** + **.** (full stop/dot key) in MacOS on the keyboard to open a shortcut menu. As you start typing, the options in the menu narrows down. You select an action using the arrow up and down keys, and pressing **Enter**.

Quria hotkeys

Some common functions can be activated using keys or key combinations, commonly known as hotkeys.

Key combination	Function
Alt+0	Fetches the latest patron in the **Check out**, **Create reservation** and **Add manual ILL In** windows instead of scanning the card in the patron card field.
Alt+1	Lists available shortcuts, also from input fields
Alt+2	Opens the **Check out** window
Alt+3	Opens the **Renew** window
Alt+4	Opens the **Check in** window
Alt+5	Opens the **Sell articles** window
Esc	Closes the current window without saving
F1	Opens the online help

Standard web browser hotkeys

Web browsers such as Microsoft Edge, Google Chrome and Mozilla Firefox provide built-in support for hotkeys that can also be used in Quria. These are some of the useful hotkeys:

Key combination	Function
F3 or Ctrl+F	Searches on the current page
Tab	Navigates to the next tab stop
Shift+Tab	Navigates to the previous tab stop
Ctrl+Page Down/Ctrl+Page Up	Switches between open web browser tabs.

Please refer to the documentation for your web browser for a complete list of supported hotkeys.

Using special characters

Since Quria is a web-based program, there are no specific modules in Quria to support usage of other scriptures, symbols or special characters. Here are some tips about common ways to enable special characters. Please refer to the documentation for your web browser and operating system for further information.

Google Chrome

The Google Chrome web browser support using input tools:

www.google.com/inputtools/try

Microsoft Windows

In the Microsoft Windows operating system, there are two ways to enable special characters:

- Using the **Character Map**
- Installing several languages and keyboards

Character Map

The **Character Map** is a standard tool in Microsoft Windows that enables you to view all characters that are available in a selected font. It makes it easy to copy

individual characters or a group of characters to the clipboard and paste them into for example title names in Quria.

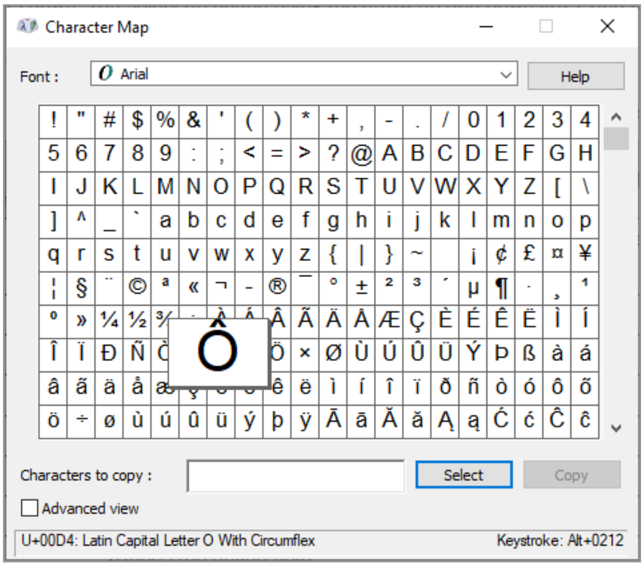
Opening the Character Map

Windows 10: Type *character* in the search box on the task bar, and choose **Character Map** from the results.

Windows 8: Search for the word *character* on the start screen and choose **Character Map** from the results.

Windows 7: Click **Start**, select **All Programs**/**Accessories**/**System Tools**, and then click **Character Map**.

The characters are grouped by font.



1. Select a font in the list to display a set of characters.
2. To select a character, click it and then click **Select**.
3. Right-click in the field in Quria where you want to use the character, and click **Paste**.

Installing several languages and keyboards

If a language is listed under **Preferred languages** but does not appear on the **Windows display language** list, you first need to install its language pack (if it is available).

1. Windows 10: Select **Start**/**Settings**/**Time & Language**/**Language**.
2. Choose a language from the **Add a language** list under **Preferred languages**, and then select **Options**.
3. Select **Download** from the **Download language pack** option.
4. After the language pack is installed, click **Back**.
5. Choose a language from the **Windows display language** menu.

Opening the on-screen keyboard

1. Go to **Start**, then select **Settings**/**Ease of Access**/**Keyboard**, and turn on the toggle under **Use the On-Screen Keyboard**.

A keyboard that can be used to move around the screen and enter text will appear on the screen. The keyboard will remain on the screen until you close it.

Quria modules

Quria has a set of modules that will be activated based on customer contracts and agreements. The initial setup will be handled by the project leader for your installation. Changes after the initial setup will be handled by Axiell support if you create a **customer.hornbill.com/axiell** issue.

Functionality	Comment
Acquisitions	See also: **Acquisitions**
Address auto-completion	This module is based on Google Places and simplifies the registration of addresses.
Analytics	See also: **Analytics**
Author fund reports	Only used for Swedish installations. See also: **Year end tasks**
Depot handling	See also: **Depot handling**
Digital agreements	See also: **Digital agreements**
Document archive	This module makes it possible to store documents in Quria
Events	See also: **Events**
Image archive	See also: **The image archive**
Interlibrary loans	See also: **ILL**
Libris inter-library loans	Only used for Swedish installations. See also: **Import of incoming ILL requests**
Map guide	See also: **Map**
Mobile library	See also: **Mobile library**
NCIP integration	Only used for Norwegian installations. See also: **Depot handling**

Functionality	Comment
Patron membership	Only used for German installations. See also: **Patron membership**
Periodicals	See also: **Periodicals**
Remote check-in	Enables the possibility of remote check-in of items not known by your system. It is intended mainly for Norwegian NCIP-customers, but can also be used on other markets to print transportation slips.
School module	See also: **Organisation settings**

Using Quria offline

You can still check out items in Quria even if the internet connection fails for some reason.

The transactions are saved in the web browser's storage, under the signed-in user's application data folder on the local computer (using a standard Windows configuration). This means that if user A performs offline transactions, and then user B signs into the same Windows workstation, no offline transactions will be available for synchronization for user B. To synchronize, sign in as user A again in Windows and in Quria, and the synchronization will start once an online connection is detected.

Notes:
Quria must have been started at least once on the current computer for the offline functionality to work.

Internet browser add-ons that block tracking or restrict cookies will prevent using the offline functionality.

The offline interface is displayed automatically if Quria loses contact with the internet. As soon as the connection is re-established, a message in the top of the screen will inform you that an online connection to Quria is available and you can click on a link in the message to return to normal mode.

The default loan period in Quria is 28 days. You can set up rule on consortia level if you want a different loan period. In offline mode, you enter or scan the patron card number and the barcode similarly to normal mode, and can edit the proposed loan period if you want to.

A receipt can be printed once the checkout is completed.

You can monitor the transactions made during offline mode in the **Configuration** section, under **Admin**/**Executed jobs**.

Tips when handling Quria offline on shared computers

Since offline transactions are stored per signed-in Windows user, there are multiple solutions available to avoid problems related to different users signing in and creating offline transactions that later need to be synchronized by each user. Please consult your IT department for assistance on how to handle the storage and synchronization of web browser application data.

Create a bookmark in the browser to the Quria offline interface:
*https://*customer*.quria.axiell.com/frontend/*tenantid*/content/offline.html*

When offline mode occurs, open the web browser and go to the bookmark for Quria offline and perform any loans here.

If the internet connection is re-established, the loans will be synchronized automatically.

If Quria still is offline when the library closes for the day, you can turn off the computer. The next day, you sign in again with the Windows/domain user that was used yesterday, and the synchronizing will start automatically. If there is still no connection to internet, continue working in offline mode.

The offline bookmark in the browser can also be useful for example when you start up your computer in the morning and there is no internet connection, or if you for some reason need to re-start during an offline session.

Changing location

This is how you change location when you are signed in:

1. Click the user icon in the top left corner.
2. Select **Change location**. A dialogue opens.
3. Select account, authority, branch and/or workplace in the dropdowns.
4. Click **OK**.

Patrons

A patron is a user of library services. Another common term for patron is borrower.

You can administrate anything related to patrons and cards from the Patron section in the main menu.

You make different settings for patrons under Settings/Patrons in the Configuration section of the main menu.

See also: Patrons configuration

Adding a patron

When you add a patron, the basic data is stored and searchable in the entire consortium, while the account specific, detailed data is stored on account level.

1. Go to the **Patron** section in the main menu.
2. Click **Add patron**.
3. Fill in the patron information. Mandatory fields are marked with an asterisk.
   In some countries, patron data can be fetched from a national database by entering the patron's national identity number and pressing Enter. If the patron already exists in the system, you get a notification that the patron already exists, and you can click **Go to patron** to see the patron details. Otherwise, some patron information is automatically filled in, and you can add more information or save the patron.
4. Guarantor: If the patron age requires a guarantor, and a rule is set that a guarantor is required, you have to either make a connection to an adult patron, or add a name for a guarantor. You can also search for a guarantor from here, using for example a name or a card number. The guarantor is used only for notifications and debt purposes.
5. Click **Save**.

If the Digital agreements module has been activated, a General terms and conditions agreement is automatically added to the patron account, ready to be signed. Which agreement that is added depends on the Digital agreement rules. You find the agreements, both signed and unsigned, under **Agreements** in the patron details.

See also: Usage of guarantors and Digital agreements

The patron details window

The patron details window is the window that opens when you click a patron name in the patron search results. In the menu on the top you find loans, reservations, debts, patron data, notifications and agreements. You can also access the patron details of the patron that has an item on loan, after having scanned an item and clicking the patron name.

In the top field there is a **Message** button to click to send a message to the patron's phone or email address, visible only if a phone number or email address has been registered for the patron.

There is also a **Print** button to print a status receipt of all loans, reservations and debts that the patron has.

Loans

List of the patron's current items on loan.

Click the context menu for a single item to renew or check in that item, without accessing the actual item. Click the title to open the work with all its details. As long as a loan is not included on a bill, you can close a loan without access to the physical item, by selecting **Close loan** in the context menu. Closing loans will not trap reservations.

Click the expand icon for a single item to reveal more details about the loan.

Check the boxes for some or all items and select **Renew** or **Close loans** to renew or close the selected loans, without accessing the actual items individually.

Click **Add loan** to open the **Check out** window to add a loan to the patron.

> **Note:**
> When you open the **Check out** window this way, you cannot change to another patron in the **Check out** window.

You can also display and search in the patron's loan history by expanding the **Loan history** section. You can search for titles or creators and also limit the period when the items were returned. The default loan history period is set to start 3 years ago from today's date. You can download the loan history to a PDF file. The file can contain a maximum of 800 loans, so in cases with very many loans in the loan history, you first need to limit the list.

Reservations

List of the patron's current reservations.

Click the context menu for a single reservation to edit or cancel that reservation, or to open the work.

Click the expand icon for a single reservation to reveal more details about the reservation.

When the reservation has been completed, it disappears from the list.

Debts

List of the patron's debts and bills.

Click the context menu for a single debt to pay or to remove that debt, or to settle or close a bill.

Click the expand icon for a single debt or bill to reveal more details about it.

When a debt is paid or removed, it disappears from the list and can be found under **Payment history** or **Removed debts**.

When a bill is settled, you see the date it was settled. Bills paid via a an integrated financial system are marked **External payment** and information about the financial service will be displayed. The patron will be released from the loans and the items will get the automatic status **Bill paid**. The items can then be found, for example, under **Collections/Items** for further handling.

When you close a bill, you can set a status for the items included in the bill, for example *Lost*, and add a comment. You will see the date the bill was closed and its details in the list. The patron will be released from the loans and the items will get the chosen status.

You can also sell articles to the patron from here, provided that the library has items for sale.

See also: **Billing of lost items**

Patron data

Personal data for the patron, as well as information about their cards and statistics, is displayed.

A patron can be blocked or deleted from here, provided that you have permissions for these actions.

To edit details of a section, click the pen in the upper right corner of that section. Only fields with values are shown.

General information

The general information, for example name and birth date, is stored and searchable in the entire consortium.

The identity number is country-specific.

Title, gender, category, communication language and custom fields are defined under Configuration/Settings/Patrons and Configuration/Settings/Circulation and notifications.

You can set an absent period to avoid trapping of reservations during an absent period. The patron can also view, set and change this period in Arena if this option is enabled. Note that the absent period can only be seen in Arena if both the start date and end date of the absent period have been set.

The mobile library routes and stops available for a patron depend on the selected pick-up branch. If you add a stop for a patron, this is where reservations for the patron will be picked up.

The external ID is unique and cannot be changed. It can be useful when searching for patrons that have signed in to Arena and filled in forms for ILL requests and acquisition proposals.

Check the box to allow the patron Open Library access. If you want to grant the patron access only to some branches, check the boxes for these branches.

If a patron has accepted to receive marketing information in Arena, you see this here, but you cannot change this setting from Quria.

Notes

You can add notes about the patron.

Contact information

The contact information is stored on account level.

A patron may have multiple phone numbers. A check in the SMS box makes the phone number a recipient of notifications from the library. If you add several phone numbers for which you check the SMS box, all the numbers will receive all SMS notifications.

A patron may have multiple email addresses, and checking the **Active** box makes one or several email addresses active. The active email addresses are used for notifications sent from Quria.

A patron may have multiple addresses, of which one of each is set as active by checking the **Active** box. The active address is used for notifications sent from Quria.

You can mark a patron’s address as **Civil registration address** for the address to be updated automatically via for example the Nasjonalt lånekort (Norway) or Navet (Sweden). If desired, it is possible to register one address as **Civil registration address** and a different address as active address.

Membership

The Membership functionality makes it possible for the library to limit the validity period of patron accounts.

See also: **Patron membership**

Statistics

The following statistics is shown for the user:

- Total number of loans
- Number of loans this year
- Date when the patron joined library
- Date and type of the latest activity

- Date of latest update of contact information. The information may have been confirmed or updated in Arena or updated in Quria. The date will not be refreshed when updates are done via PatronSync (Navet in Sweden and Nasjonalt lånerkort in Norway).

PIN code

The patron uses the PIN code to sign in to Arena and when using a self-service desk. There is one PIN code for all cards (if many). The PIN code can be changed.

Patron's own cards

The following actions can be selected from the context menu:

- Block/Unblock: A blocked card cannot be used at all in any library; not for loans, not to sign in to Arena, etc. It can be unblocked and used again.
- Make inactive/Make active is available only if a patron is registered at several accounts. It works similar to Block/Unblock but only affects the current library.
- Remove is available only if the card only is active in the logged in account. A removed card is removed from the system and cannot be used again.

New cards can be added from here.

Patron connections

Patron connections are used to set up relationships between patrons in order to take responsibility for for example loans and debts. Each patron can only belong to one group of patron connections, and one patron in each group has to be assigned to be the main contact.

You find a list of patrons that are connected to the current patron, for example young patrons that require a guarantor. If you want to remove a connected patron, click the trash can next to the patron. You can also connect other patrons from here.

Notifications

All still valid notifications that have been sent to the patron are listed on the **Notifications** tab. You can see the original message when you expand the notification and it is possible to resend or reprint a notification based on the current version of the message text template. Note that direct messages can only be resent using their original send method. The **Resend** option will only be enabled if the patron has a valid active email address or SMS number and the notification rule that generated the notification allows email or SMS (at the time the notification was generated).

Notifications that are no longer valid, such as overdue reminders for items have been checked in or reservation notifications for reserved items that have been picked up, are cleared automatically, but notifications such as age group transition e-mails and direct e-mails have to be deleted manually to disappear from the list.

Agreements

If the Digital agreements module has been activated, you find the agreements, both signed and unsigned, here. The General terms and conditions agreement that has been defined in the Digital agreement rules is automatically added to the patron account, and has to be signed before the patron can start using the library services.

To print an agreement for the patron to sign, click **Print** in the context menu for the agreement. When the patron has signed the printed agreement, click **Verify signature** in the context menu.

If the patron has signed an agreement digitally, **Patron** is displayed under **Signed by**. If the patron has signed a printed agreement, the name of the staff member that verified the patron's signature is displayed instead.

You can add additional agreements by selecting an agreement in the dropdown list and clicking **Add to patron**. Agreements other than General terms and conditions agreements do not block patrons from using the library services.

See also: Digital agreements

Finding out details about a loan

In the loan details you find due date, item number, if it was renewed, etc.

1. Scan the patron's library card or search for the patron.
   The patron details window opens.
2. Click **Loans** and find the title.
3. Click the expand icon to find details about the loan.

See also: Loans

Searching for a patron

When you search in the patron module, you search for patrons in the entire consortium. The last 10 patrons that you have searched for or handled in the current session are saved for quick access anywhere you search for patrons. The very last patron that you searched for or handled can be fetched by using the Alt+0 keyboard shortcut instead of scanning the patron card in the **Check out**, **Create reservation** and **Add manual ILL In** windows. The list of recent patrons is cleared once you sign out.

> **Note:**
> When you search for a patron using their birth date, enter it in the same format as in patron details. For example, to search for a patron born May 2, 1977 in a Norwegian version of Quria, you search by entering 02.05.1977, but in an English version, you need to enter 02/05/1977.

1. Go to the **Patron** section in the main menu.
2. Type patron search criteria in the search field (name, date of birth, address, card number, phone number, email address, national ID, external ID or any combination of these), and press **Enter**.
   All patrons matching your search criteria are listed below the search field.
3. Click on the patron to open the patron details window.

If a patron is not registered to your library you will need to add them before accessing the patron details window.

Advanced search using prefixes

Use the prefixes below followed by a colon and the search criteria. You can use the long or the short prefix name. With prefix, the search is not fuzzy.

Short	Long
crd	cardnumber
dat	birthdate
eid	externalid
nid	nationalid

How to sort the search results list

You can sort the list by name and date of birth.

- Click on the header that you want to sort by in the table. Click again if you want to sort the other way around, from bottom to top.

Handling many patrons at the same time

At some point, you may want to send the same message to a number of patrons, edit the same piece of information for many patrons, or delete several patrons. This is possible using patron bulk handling operations. You can also select several patrons and export patron data to a CSV file, to share with others or work with the data further on your own.

Only users with patron bulk permissions have access to bulk operations functionality:

Bulk handling/Patrons: Bulk menu permission: Access to the section where several patrons can be handled in one operation

Bulk handling/Patrons: Bulk messages permission: Access to the **Send messages** button on the **Patrons** tab

Bulk handling/Patrons: Bulk modify permission: Access to the **Change data** button on the **Patrons** tab

Bulk handling/Patrons: Bulk delete permission: Access to the **Delete patrons** button on the **Patrons** tab

Selecting patrons for bulk handling

You can select patrons for bulk handling either by searching or by filtering. The filtering includes several types of patron data, for example personal data, patron activity, debts and agreement status.

1. Select **Patron** in the main menu.
2. Click the **Patrons** tab.
3. Either enter a search query such as name or address and press **Enter**, or use the filtering options under **Refine search** and click **Search**.
   You can also combine searching and filtering to narrow down the hits.
4. In the list of all matching patrons, click the top check box to select all the patrons in the list, or select a few of the patrons that you want to handle.

Note:
Postcodes can be stored in Quria with or without blank characters (whitespace) inside the postcode. When you perform a refined search for patrons using postcode, you need to insert a wildcard (*) in the position for the possible blank character to find patrons with postcodes with and without blank characters in one go.

Patron bulk messages

1. After having selected the patrons you want to contact, click **Send messages**.
2. Select email or SMS.
3. Fill in the subject and message text if you selected email, and message text if you selected SMS. You can use variables in the text if you want to personalize your messages, e.g. insert the patron first name in the message.
4. Click **Send** and then confirm your action.

You will see a confirmation of sent messages and information if there were messages that could not be sent.

Changing data for many patrons at the same time

You can bulk change the following settings:

- Patron category
- Pick-up branch
- Route/stop
- Has permission for Open Library access
- Custom fields (if used)
- School and Class (if **School** has been enabled for the current branch)

1. After having selected the patrons you want to handle, click **Change data**.
2. Select which settings you want to change and click **Change**.
3. Confirm your action.

Exporting patron data to a CSV file

1. After having selected the patrons for whom you want to export patron data, click **Download as CSV**.

A CSV file is created in your **Downloads** folder.

Deleting many patrons at the same time

You cannot delete patrons that have items on loan, reservations, debts or unpaid bills, or patrons that are guarantors for other patrons. If you delete patrons that have agreements connected, the agreements will be deleted as well.

1. After having selected the patrons you want to handle, click **Delete patrons**.
2. Confirm your action.

You get a confirmation of how many patrons were deleted and of how many patrons that could not be deleted.

> **Tip:**
> Perhaps you need to comply with legislation that stipulates that inactive patrons must be deleted after 3 years, and at the same time you must keep information about bills for 7 years? In that case, you can use the combination of **Inactive after** (and enter a date 3 years ago) and **No bills sent from (date)** (7 years ago) to find all patrons that have been inactive for 3 years and have not received any bills for 7 years. Then you can easily delete these patrons from the system.

Searching for loans

You can search for items in relation to loan information by selecting the **Loans** tab in the **Patron** section.

Only users with the Bulk handling/Loans: Bulk menu permission have access to this section.

You can search for a title or creator and then narrow down the search results by filtering on the organisation where the items were checked out, intervals of loan dates and due dates or patron categories.

> **Note:**
> If you filter on loan dates, please note that it is only the original check-out dates that are searched, not the renewal dates.

You can also search using prefixes

For Quria installations with school branches, you can also filter on school and class information. You can also search for all titles with loan information using * and then filter on all loans.

The search results include some information about the title, some patron details, checkout date and due date of the loan.

In some special cases, you may want to extend the due date for loans. Only users with the Bulk handling/Loans: Bulk extend due date permission have access to this functionality. As long as the loans are not included on bills, the due date can be extended by clicking **Extend due date**.

Note:
Extending the due date is a different action than the normal and more controlled renewal procedure. It does not take rules (that for example define maximum number of renewals or patron blocks) into account, and does not generate debts or data for analytics.

As long as the loans are not included on bills, you can close loans without access to the physical items, by clicking **Close loans**. Closing loans will not trap reservations.

You can also download the results as PDF or in CSV format, to share with others or work with the data further on your own, by clicking **Download as PDF** or **Download as CSV**.

Note:
Some web browsers may not fully support saving as PDF. In that case, you can usually find a browser add-on on the Internet.

Handling debts

Patron debts are displayed at the top of the patron details window. By default, billed amounts and debts are displayed as one total amount. But if you have decided that billed amounts should not be part of the Debt block amount, **Debts amount** and **Bills amount** are presented separately.

See also: Organisation settings

Paying debts

When a patron pays a debt, you manually register this in Quria.

1. Open the patron details window and select **Debts**.
2. Click **Pay debts**.
3. Select **Pay whole debt**, **Pay selected debts** or **Pay part of debt**.
4. If the patron wants to pay part of debt, specify the amount in the next step.
5. Click **OK**.

If the patron has many debts, and wants to pay specific ones:

- Select **Pay debt** in the context menu of each specific debt, or select the debts to pay by checking the boxes.

Removing a debt

The permission Patrons/Remove debt is required to remove a patron’s debts.

This is how you remove a debt from the system, if the debt should not be paid.

1. Open the patron details window and select **Debts**.
2. Select **Remove debt** in the context menu of a specific debt, or select the debts to remove by checking the boxes.
3. Add a comment, select to print a receipt if you want to, and click **Remove**.

Handling many debts at the same time

You can search for debts by selecting the **Debts** tab in the **Patron** section.

Only users with the Bulk handling/Debts: Bulk menu permission have access to this tab.

You can search for a patron name or title information and select to show debts of all or some statuses. You can then narrow down the search results by filtering debt types, patron categories, removal types and on the dates the debts were created. For Quria installations with school branches, you can also filter on school and class information.

The search results include information about the debt type, creator and title (for debts connected to specific items) and debt information such as debt status and amount. For removed debts, you also see removal type and removal comment.

You can remove individual debts similar to in the patron details, or remove many debts in one go.

You can also download the results in CSV format, to share with others or work with the data further on your own, by clicking **Download as CSV**.

See also: **Debt reminders** and **Billing of lost items**

Handling bills

Billed amounts are displayed at the top of the patron details window. By default, billed amounts and debts are displayed as one total amount. But if you have decided that billed amounts should not be part of the Debt block amount, **Debts amount** and **Bills amount** are presented separately.

See also: **Organisation settings**

Following up on bills

You find the bills that a patron has under **Debts** in the patron details.

When a bill has been paid, it needs to be marked as settled in Quria.

1. Go to the **Patron** section in the main menu.
2. Find the patron who has paid a bill and select **Debts**.
3. Under **Bills**, find the bill number and select **Settle bill** in the context menu.

Settling a bill entails the following:

- The bill gets a settled date in the list under **Debts** in the patron details.
- The items on the bill are removed from the patron’s loans.
- The item gets the status Bill paid. This status can be used as a search criteria in item bulk handling, to find items that need to be deleted from Quria.
- If there is a rule that blocks patrons with bills, the patron is unblocked.
- The payment info is included in analytics (data source: Debts, debt type: Bill replacement charge and Bill administration fee).

Note:
If rules are set so that an item on bill may be checked in, and if a patron returns such an item, the bill is reduced with the amount of the replacement charge while the administrative fee remains to be paid.

You can also close a bill if, for some reason, a bill should not be paid by the patron, by selecting **Close bill** in the context menu of a bill. You can add a manual status for the items on the bill. Loans on a closed bill will also be closed and the items will get the selected status.

Searching for bills

You can search for bills using the bill number or patron name by selecting the **Bills** tab of the Patron page.

Only users with the Patrons/Bills permission have access to this tab.

You can then narrow down the search results by filtering on patron categories, on the dates the bills were created, bill status and status dates, owning organisation and removal types.

The search results include information such as bill number, amounts, status details, patron name and owning branch. For removed bills, you also see removal type and removal comment. When you expand the bill, you also see items included in the bill.

After finding a bill, you can settle or close the bill just as from the **Debts** section of the patron details.

See also: **Debt reminders** and **Billing of lost items**

Giving patrons access to Open Library

1. Open the patron details window and select **Patron data**.
2. Click the pen to edit **General information**.
3. Check the box **Allow patron Open Library access**. If you want to grant the patron access only to some branches, check the boxes for these branches.
4. Click **Save**.

Sending a message to a patron

You can send an email to a patron's registered email address, or a text message to a patron's phone from Quria.

1. Open the patron details window.
2. Click the **Message** button in the top field, visible only if an email address and/or a phone number has been registered for the patron.
3. Select message type.
   The message for Direct message is displayed.
4. Adapt the subject (only for email) and the message text with the information you want to send.
5. Click **Send**.

See also: **Notifications** and **Message texts**

Printing notifications

If there is no email address or phone number for sending text messages configured for a patron, notifications can be printed in order to send by post.

The permission **Print-outs** is required.

You find the **Print-outs** tab in the **Patron** section.

You can filter to display only one type of messages and on organisational levels.

Once you click **Print**, the selected message is sent to the printer and is no longer displayed in the list, unless you check **Show handled files**. Handled print-outs will only be visible in 7 days.

Note:
A maximum of 500 unhandled print-outs are displayed. If there are more than this, print some, and then refresh the window to fetch more print-outs.

See also: **Notifications**

Patron membership

The Membership functionality makes it possible for the library to limit the validity period of patron accounts, for example if the library wants to get hold of patrons on a regular basis to check personal data, or the library charges a fee for its services. This functionality is enabled at the time of installation of Quria. When a membership expires, the patron cannot make reservations or check out items unless the membership is renewed.

User permissions control some of the membership functionality:

- Patrons/Delete membership: Permission to delete memberships. The option is available by clicking the trash can when editing the **Membership** section on the **Patron data** tab of the patron details window.
- Patrons/Edit membership expiry date: Permission to the edit expiry date of a membership. The option is available when editing the **Membership** section on the **Patron data** tab of the patron details window.

Prerequisites for the membership functionality

In order for the membership functionality to work, the following needs to be considered:

Setting	Description	Learn more
Patron membership types	Must be set up	Membership types
Scheduled jobs	The job **Update membership based on bank payments** allows for patron memberships to be automatically extended. The library staff needs to download bank files for further handling. The job **Update membership based on manual payments** is used to create debts that patrons pay to extend their membership. If neither of these jobs are activated, patrons will be blocked when their memberships expire and the library staff has to reactivate the memberships manually.	Administration tools Bank files
Bank payment	To use memberships based on bank payments, the following must be set up. 1. On **Authority** level under **Organisation settings**: • **Days before expiry**: The number of days needs to correspond with the frequency of running the job **Update membership based on bank payments**. Otherwise, the job will only handle the patron memberships that expire the same day as the job is run. This means, that if you run the job once a week, the number of days before expiry needs to be at least *7*. • **Payment period**: The number of days the bank needs to withdraw the amount from the patron's bank account. 2. Integration to SEPA.	Organisation settings Integration settings

Adding a membership to a patron

After having configured membership types, a section for membership appears under Patron data.

1. Click **Add membership**.

2. Select membership type and payment method. Fill in banking details if **Bank withdrawal** is selected.

3. Click **Save and activate**.

The membership is now activated.

Note:
When a membership with manual payment is added or renewed, the expiry date is updated when the membership fee is paid.

See also: Patrons configuration

Bank files

Bank files are used for automatic payment of patron memberships. You can download files for bank usage.

The patron permission **Files** is required to access bank files.

You find the files on the **Bank files** tab of the **Patron** section in the main menu.

You can filter on file types and authorities and also select to show only unhandled files or unhandled as well as handled files.

Click **Download** to download the file to your computer.

Downloading patron data and editing, blocking or deleting a patron

Downloading patron data

To support GDPR requirements, it must be possible to download all information (except PIN code) that the library system has about a patron in a machine-readable format. Only patron data for the current account is downloaded. If the patron has multiple accounts in a multi-account system, the patron needs to contact each account to get all data.

Only users with the **Patrons - Download patron data** permission has access to the **Download patron data** button on the Patron data tab.

1. Go to the **Patron** section in the main menu.
2. Search for the patron and click the patron to open the patron details window.
3. Open the **Patron data** tab.
4. Click **Download patron data**.

The file is saved in json format in the **Downloads** folder.

Editing patron data

You can edit the personal data for a patron.

1. Open the patron details window and select **Patron data**.
2. To edit details of a section, click the pen in the upper right corner of that section.
3. Update data as needed.
4. Click **Save**.

Blocking a patron

If you have an issue with a patron and this patron should not be able to use any of the services at the library, then you can block the patron. The block takes effect at this library only. You can block a patron even if there are loans, debts etc. Only users with the **Patrons - Block/unblock patron** permission has access to the **Block patron** button on the Patron data tab.

Note:
This is not the same as a block because debts have reached a certain limit. That is a soft block and cannot be reset from patron data; it can only be reset if debt is paid and below the block level.

1. Open the patron details window and select **Patron data**.
2. Click **Block patron**.
3. Add a comment and click **Block account**.

To unblock a patron, follow the same instructions as when blocking, but click **Unblock patron** instead.

Deleting a patron

A patron might ask to be removed from the library. When you delete a patron, you delete them from your library; they can still be found in other libraries where they have an account. Only users with the **Patrons - Delete patron** permission has access to the **Delete patron** button on the Patron data tab.

1. Open the patron details window.
2. Make sure the patron has no loans, no reservations and no debts (check in each section). You cannot delete a patron who has active loans, reservations or debts.
3. Open the **Patron data** tab.
4. Click **Delete patron**.
5. Click **Delete patron** again, to confirm.

Blocking and removing cards

Blocking a card

If a patron has lost their card, or for any other reason, you can block the card.

A blocked card cannot be used at all in any library; not for loans, not to sign in to Arena, etc. When you block a card it freezes immediately, even if there are outstanding debts, loans etc.

If the card is active at other libraries as well, it will be blocked there too.

1. Open the patron details window and select **Patron data**.
2. In the **Patron’s owns cards** section, click the pen to edit.
3. Select **Block** in the context menu.
4. Add a comment if you want to, and click **Block card**.

If the patron finds the lost card, or for any other reason, you can unblock a blocked card and it will work as before again. You do this in the same way as blocking, but by selecting **Unblock** instead.

Removing a card

If you know a card will never be used again of some reason, you can remove it from the system.

1. Open the patron details window and select **Patron data**.
2. In the **Patron’s owns cards** section, click the pen to edit.
3. Select **Remove** in the context menu.

Collections

The collections is a register of all the library items and electronic resources structured in a specific way. Another common term for the collections is catalogue.

Searching the collection

You use the **Search** field on the Collections page to search for all titles in the collection. The search results are dependent on the locale set in the installation of Quria; not on the user interface language. This also affects the sorting of search results.

1. Go to the **Collections** section in the main menu.
2. Write your search query or the item number in the search field and press **Enter**. The search is first made for the title, and only if there is no hit for the title, the item number is searched for.
3. You can refine the search by expanding the tool located just below the search field.
4. You can also reduce the search hits to titles with holdings at a particular part of the organisation, using the dropdown menu just below the filter tool.
5. Narrow down the search results further using the search facets on the right-hand side.
6. Click a title in the search results list to open the title details. If there is only one hit, the title details page opens directly.

Saving searches and recent searches

Your most recent catalogue searches are automatically saved, and you find these at the upper part of the search page. The list of recent searches is cleared when you sign out from Quria. You can save your favourite searches for future use. Saved searches do not include use of facets.

Search tips

Simple search

Quria uses fuzzy search. This means that matches similar to the search query will also be listed in the search result.

The fuzzy search allows up to two deviations depending on the length of the word:

- 0-5 characters: no fuzziness
- 6-7 characters: 1 deviation
- >7 characters: 2 deviations

If you do not want to use fuzzy search, you can use phrase search (see below), or add *~0* to the word.
Example: *horse~0* will search for the exact word *horse* only.

Quria uses free-text search. The following fields are included:

Work

- Title
- Creator
- Subjects - all fields
- Variant titles for the work

- Description
- Genre

Expression

- Title
- Contributor
- Notes on resource
- Variant titles of the expression

Manifestation

- Title
- Other title information
- Variant title
- Series
- ISBN Note: Enter the number without dashes in free-text search
- Notes on resource
- Publisher

Advanced search

Truncating: Use an asterisk (*) anywhere in a word. The asterisk represents zero, one or several characters and the search results will include words with any character(s) where the asterisk is. You can use this when you are not sure of the spelling. Fuzzy search is not applied with truncation.

Masking: Replace a character with a question mark (?) anywhere in a word. The question mark represents one character. Fuzzy search is not applied with masking.

Phrase search (strings delimited with quotes “ “):

The words in the phrase must be in the correct order.

The phrase can be the whole field or part of the field. Fuzzy search is not applied with phrase search.

Operators: Construct search strings using boolean operators AND, OR, NOT (capital letters), and parenthesis. If there is no operator, an implicit AND is used.

Prefixes: Use the prefixes below followed by a colon and the search criteria. You can use the long or the short prefix name. Words in the search query without prefix are searched as free-text.

Examples:
cre:brown will search for creators named Brown.
sub:(Europe history) AND sub:England will search for subjects Europe and history and subject England,

(bike OR bicycle) AND sub:sport will search for bike or bicycle in free text and subject sport.

Short	Long	Searches in
cat	category	Literary form (manifestation). See detailed list below.
cla	classification	Classification (work)
cnr	controlnumber	Identifiers for the manifestation, e.g. control numbers
con	contributor	Contributor (expression)
cre	creator	Creator (work)
des	description	Descriptions (work)
gen	genre	Genre (work)
lan	language	Language + Other languages (expression).

Short	Long	Searches in
		Use the MARC21 standard 3-digit language code, for example *lan:swe*. See **MARC21 language codes**
man	manifestationtype	Manifestation type (manifestation). See detailed list below.
nam	name	Creator (work) + Contributor (expression)
note	note	Note on resource (all levels)
num	number	ISBN, ISSN or EAN (manifestation)
pub	publisher	Publication information > Organiser/agent type > Name (manifestation)
ser	series	Series name (work)
she	shelfmark	Shelf mark (manifestation)
sub	subject	All subject fields (work)
tar	targetaudience	Target audience (manifestation). See detailed list below.
tim	titlemain	Translated title (work)
tit	title	Title (work) + Variant titles for the work (work) + Title (expression) + Variant title (expression) + Title proper (manifestation) + Other title information (manifestation) + Variant title (manifestation)
tiw	titlework	Title (work)
year	year	Normalised year (manifestation, from Publication information), for intervals use ex. *year: 2015-2018*

For cat (category), man (manifestation) and tar (targetaudience), the exact search terms listed below can be used. The values are case sensitive but can be truncated, for example *cat:F**.

cat (category)		
Anthology	HumorSatiresEtc	Poetry
BoardBook	Letters	ShortStories
ComicStrips	MixedForms	Speeches
Dramas	NoAttemptToCode	TextBookLetterCourse
Essays	NotFiction	Unknown
Fiction	Novels	

man (manifestation)					
apertureCard	brailleMusic	eBook	internet	paperback	talkingBookCd
article	cassette	eBraille	largePrint	periodical	talkingBookMp3
audioBook	cd	eImage	map	photograph	text
audioBookCd	cdRom	electronicMaterial	microfiche	picture	topicBox
audioBookDigibok	computerGame	eMap	microFilm	pictureBookWithBrailleText	toy
audioBookMp3	computerDisc	eMovie	microForm	printedMusic	video
bluray	daisy	eMusic	mixedMedia	psGame	videoDisc
book	data	ePeriodical	movie	serial	videoGame
bookAndCassette	document	game	multimedia	serialNumber	vinyl
bookAndCd	dvd	gameboyGame	music	sheetMusic	wiiGame

man (manifestation)					
bookAndVisualRecording	dvdRom	giantPrint	newspaper	soundRecording	xboxGame
braille	easyReading	hybridBook	object	tactileBook	
brailleAndText	eAudio	image	otherMaterial	talkingBook	

tar (targetaudience)		
Adolescent	Juvenile	Primary
Adult	PreAdolescent	Specialized
General	Preschool	UnknownOrNotSpecified

Sorting and filtering search results

The search results consist of the titles (expressions) corresponding to your search, and the different language versions of these titles (if any).

Sorting the results list

You can sort the list by title, creator or language.

Click on the header that you want to sort by in the table. Click the header once more if you want to sort the other way around, from bottom to top.

Filtering the results list

You can narrow your search in the **Facets** column to the right, in the following areas:

- Creator
- Subject
- Literary form
- Target audience
- Publication year
- Manifestation type
- Language

The terms within each area are listed in most hits order, apart from publication years that are listed chronologically.

Check a box to narrow the search to only show titles corresponding to that term. Note that it is only the search results list that is narrowed; when you click on a title you will still be able to see all languages, media types etc. on the title details page.

Checking more than one term (A, B) means show the titles corresponding to A and B.

Cataloguing in Quria

General information

Quria is an international library system where the metadata structure is based on the FRBR (Functional Requirements for Bibliographic Records) standard, developed by IFLA (International Federation of Library Associations and Institutions). Accordingly, we recommend the international cataloguing standard RDA (Resource Description & Access) for cataloguing in Quria, since the RDA standard is also based on FRBR.

See also: Conceptual model - Collections

RDA is an international standard where national adaptation is common, which entails that Axiell does not provide specific recommendations for cataloguing in Quria. The explanations, tips and instructions regarding fields in Quria that are covered in the coming sections are not to be considered as cataloguing rules.

RDA is found in the online tool RDA Toolkit. RDA Toolkit is available via subscripting via **www.rdatoolkit.org**.

Swedish libraries that are members of Libris may contact Libris customer services for access to RDA Toolkit.

ISBD punctuation

ISBD (International Standard Bibliographic Description) punctuation should be used very restrictively in Quria, as the linked data format implies that the system itself creates punctuation for display and when exporting from the data format. There are a few exceptions when usage of ISBD may be beneficial. This is clarified in the instructions for some specific fields in the following sections: **Statement of responsibility** and **Edition**

Adding works

Works, expressions, manifestations and items are part of **Collections** and they all relate to each other.

You can add a work to the collection by importing a record or by adding a work manually.

Only users with the **Integrations - External sources** permission has access to the **External sources** tab of the Collections page.

Only users with permission to import MARC records or add works can see the **Import records** or **Add work** buttons. Only users with permission to get SBD files can see the **Get file from SBD** button in the Import records dialog.

> **Note:**
> You will not find your newly added work in **Collections** until you have added at least one expression for it.

Importing a work

You can import works from supported sources.

1. Go to **Collections** and click the **External sources** tab.
2. Enter a search query, such as the title of the work, and select the correct source in the drop-down menu.
3. You can refine the search by expanding the tool located just below the search field.
4. In the context menu of the work, click **Import**.

You now see a message that states that the work has been imported and you can click the link in this box to open the newly imported work.

You can also import records from some suppliers by clicking **Import records** at the top right of the screen. These records need to be in MARC format MARC21, either in xml or in so called line format to be possible to import.

You can paste MARC records, upload a file with MARC records or get a file from SBD in order to add records to the collection.

Adding a work

1. Go to **Collections**.
2. Click **Add work**.
3. First, check if the work already exists by searching on the work title. The title of the work should be the title in the first language that the work was created in. Search for the original title if you are cataloguing a translation of a work.
4. Enter the title of the new work. As you type, matching works in the collection will be displayed, to avoid that you add a duplicate of an existing work by mistake. You can view the details of existing works.
5. If the work you want to add is not already in the collection, click **Add as new work**. Mandatory fields are marked with an asterisk. Detailed information about the different fields:

Title

The title of the work should be the title in the first language that the work was created in. Enter the original title if you are cataloguing a translation of a work.

The work title can also be a uniform title.

Please note that subtitles cannot be entered for the work. Subtitles may vary between different manifestations of a work, and should be entered on the manifestation level.

Type

Work type is a mandatory parameter and describes the category or form of the work.

You find instructions for which work type that is to be entered for different material types under **Material types**.

> **Note:**
> The work type periodical cannot be changed to a different work type if there are issues connected to the manifestation.

Creator type

Specify if the creator is a person, an organisation/institution or an event.

Creator

As you type, matching creators in the collection will be displayed. This works as a register of persons in Quria and is used to avoid that you add a duplicate of an existing creator name by mistake. If the creator you want to add is not already in the collection, click **Add**.

Please note that creator is not a mandatory parameter. Some material that has no main creator should according to RDA be searched for only using the title. This applies to movies, for example.

Multiple creators

If there are several creators of a work, enter the creator with the primary responsibility for the work. If no one has the primary responsibility, enter the creator that is first mentioned. The other creators are added as contributors on the expression level.

Adding a new creator

When you add a new creator or edit a creator that already exists in the collections, it is possible to enter additional information about the creator’s name for identification, such as references to variant names, information about pseudonyms or date of birth and -death.

Displayed name: the displayed name is the name of the creator that Quria displays. This is used if you want to use a name in Quria that differs from what is entered as family name and given name.

Variant name: enter pseudonyms or other alternative name forms. Variant name is searchable, which means that the work can be searched for also using for example a pseudonym.

Related names: used to express relations between a creator and another person, organisation/institution or event. Related names are not searchable in the collections.

External authorisation

Persons (creators) can also be authorised towards an approved external source in order to improve the quality of the metadata. The source is configured when Quria is installed.

You can authorise existing creators manually and connect them to the source.

Relator term

Relator term is not a mandatory parameter but is recommended when cataloguing manually in order to make it easier to identify relations between creators and works in Quria.

The relator term indicates what kind of relation/function the creator has to the work.

The relator terms in Quria are based on the **MARC code list for relators** standard list. You can search for codes and terms in the **Relator term** field.

The most common relator term for creators is: **Author(aut)**

Date of work

The date of work is the first date associated with the work, that is the publication year of the original edition.

If you cannot identify a specific date as creation date of the work, enter the date of the earliest known manifestation.

Classifications

Classifications are used in libraries to represent the topic of a work.

As you type, matching classifications in the collection will be displayed. This works as a register in Quria. If the classification you want to add is not already in the collection, click **Add**.

When you add a new classification or edit a classification that already exists in the collections, it is possible to enter additional information about the classification, such as from which classification scheme it is fetched. The **Source** heading for the classification system is generated when importing.

Note:
Classification is not to be mixed up with shelf mark, that is entered on the manifestation level. Shelf mark is only used for arranging of resources and usually less specific than a classification.

Some classification schemes do not only express the topic of a work, but also form such as media types or physical carriers. That kind of classification is not valid for the entire work and for all its expressions. But when importing classifications, all classification schemes are placed at the work level.

Subjects

Subjects are controlled terms that describe what a work is about.

As you type, matching subjects in the collection will be displayed. This works as a register of subjects in Quria and is used to avoid that you add a duplicates. If the subject you want to add is not already in the collection, click **Add**.

When you add a new subject or edit a subject that already exists in the collections, it is possible to enter additional information, such as specification of area, name of source/authorised thesaurus from which the subject is fetched, references, and parent terms or related terms.

If you are entering the source from which the subject is fetched, it is recommended to use system codes from Library of Congress.

Relations

A work can be related to another work. Some examples are works that is included in another work (a collection), works that belong to one another in terms of content and should be read in a specific order (a sequential relationship), an article that is included in a particular periodic, or a movie that is based on a novel.

When you are entering a relation to another work in Quria you first select **Relationship type**. If you cannot find a suitable relationship type for the relation you want to enter, you can select the unspecified relationship type: **Has relation to**.

As you type in the **Related work title** field, matching titles will be displayed in a list from which you can make a selection. Please note that it is work titles that are searched for, so if you enter a translated title, it is not sure it will appear in the list.

You cannot create a link to a work that is not part of the collections. In this case, you can enter the related work as free text. Click **Add relation**, select **Relationship type** and enter creator and title instead of searching for the work.

This is how you create some of the most common relations:

Reading order

Creates a link between works of fiction to be read in a specific order (reading order, also called sequential relationship).

1. Click **Add relation**. If the work you are describing has a sequel, select relation type **Continued by**. If the work you are describing is a sequel of another work, select relation type **Continues**.
2. Search for the title you want to create a relation to under **Related work title** and save.

A relation and a link have been created between the two works. The relation and the link are displayed for both of the works.

Note:
If you want to create a link for a sequential relationship that consists of many works, you have to create a relation between each work and the work that continues/precedes it.

Movie based on a novel

Creates a link between a book and a movie that is based on the book.

1. Click **Add relation**. If the work you are describing is a movie based on a book, select relation type **Is an adaptation of**. If the work you are describing is a book that has been adapted for the screen, select relation type **Has adaptation**.
2. Search for the title you want to create a relation to under **Related work title** and save.

A relation and a link have been created between the two works. The relation and the link are displayed for both of the works.

Collection with parts/article in periodical/album with songs

Creates a link between a collection and its parts (articles in periodicals, short stories in collections or tracks on an album).

1. Click **Add relation**. If the work you are describing an article that is included in a periodical, a short story in a collection, or a track on a music album, select relation type **Is a part of**. If the work you are describing is a periodical, a collection of short stories or a music album, select relation type **Has part**.
2. Search for the title you want to create a relation to under **Related work title** and save.

A relation and a link have been created between the two works. The relation and the link are displayed for both of the works.

Note:
If you create a relation between an article and the periodical that it is included in, you can also enter the issue number and on which pages the article is found under **Applies to**.

Variant titles for the work

Variant titles of a work is used to describe searchable variants of the work title. A variant title of a work can for example be used to create search entries for:

- Parallel work titles. Used if the work has a parallel title. If the expression or manifestation that has a parallel title, use the variant title for the expression or manifestation.
- Work titles in non-Latin script
- Work titles with alternative spelling

See also: Using special characters

Medium of performance

Medium of performance is used when cataloguing music to state for which instrument, voice and/or ensemble the musical work was originally created.

Medium of performance is sometimes necessary when cataloguing musical works in order to distinguish works with the same title from one another.

For a list of terms used for medium of performance, see original.rdatoolkit.org/mop_mop-26

For Swedish terms, see metadatabyran.kb.se/beskrivning/materialtyper-arbetsfloden/musiktryck/svenska-termer-for-besattning

Genres

A genre term describes a resource (not what the resource is about - that is a subject). Examples of genre terms: biography, poetry, novel.

As you type, matching genre terms in the collection will be displayed. This works as a register in Quria and is used to avoid that duplicates are created. If the genre you want to add is not already in the collection, click **Add**.

When you add a new genre term or edit a genre term that already exists in the collections, it is possible to enter the name of a source/authorised thesaurus from which the genre term is fetched. If you are entering a source, it is recommended to use system codes from Library of Congress.

Note (Swedish market/imported records):
Lättläst (easy to read) is a genre/form term that occurs in SAOGF (Svenska ämnesord genre/form) and is used in Libris to express form. Since it is not possible to distinguish between genre and form in SAOGF, the term *Lättläst* appears on the work for records that are imported from Libris. This may be misleading, as a single manifestation may be easy to read - not the entire work.

Descriptions

Descriptions of works are used to describe the content of the work, for example as summaries, reviews or recommendations. The descriptions are displayed in the information about the work and are also possible to search for in free text.

1. Click **Add description**. You select type of description in the next step.

You can add several descriptions of a work. All descriptions are displayed in the information about the work.

Notes on resource

Notes about works are displayed in the information about the work and are also possible to search for in free text.

1. Click **Add note**. You select type of note in the next step. You can select between a large number of note types.

> **Note:**
> The list of note types that can be selected is the same for works, expressions and manifestations. Because of this, you need to consider which on level the note applies. A note regarding physical form should, for example, be entered on the manifestation level, and not for the work or expression.

In the table below, you find explanations and tips about some common notes about works.

Note	Description
General	General note to be used for additional information about the work that is not included anywhere else.
Biographical	Used for presentation of biography, with pagination if desired.
Original title	**Note**: Original title generally does not occur within FRBR, but is replaced by the work title concept. Note about original title can be used in cases when the described resource is translated and the original title (the actual work title) is unknown. Then, enter that the original title is unknown as a note.
Exhibitions	Information on exhibition date, exhibition venue or location. Mainly used for, for example, art catalogues.
Responsible	Can be used in cases where additional information is required about the function of one or more agents, persons or institutions, who are responsible for the work, and where function codes are not sufficient.
Thesis	Information about academic thesis, stating the academic institution, the degree and the year when the thesis was presented.
Bibliography	Used for presentation of a bibliography, filmography or discography, with pagination if desired.

Authorising records

Persons (creators) can be authorised towards a supported source to increase metadata quality. The source is configured at the time of installation of Quria.

You can authorise existing creators manually and connect these to the source.

Adding an expression

1. Go to **Collections** and search for the work for which you want to add an expression.
2. In the context menu for the work, click **Add expression**. Detailed information about the different fields:

Title

The expression title is the title that is used to realise the work.

If the resource you are describing is a translation, the translated title is the expression title. The original title is usually not entered as it is represented by the work title of the work for which you are adding an expression.

If the resource you are describing is an original text, the expression title is the same as the work title.

Subtitles are not entered on the expression level. They are entered on the manifestation level since they may vary between different manifestations.

Language

The language of the expression is the language through which a work is expressed. For an original text in English, enter **English**. For a translation, enter the language of the translation.

When you describe a resource that includes an expression in multiple languages, enter the dominant language or first mentioned language for **Language**. Other languages can be listed under **Other languages**.

If the expression includes multiple languages and you prefer not to indicate a dominant language, you can select **Multiple languages** for **Language**, and then list all the languages under **Other languages**.

All languages that are entered under **Other languages** are visible and searchable in Arena.

Created year

The first year associated with the expression. This means that for a translation, it is the first year this title was published.

If no specific year can be identified for creation of the expression, use the year of the first known manifestation of this title.

RDA content type

Indicates the intellectual or artistic form of the content. For instructions regarding which RDA content type that is to be entered for the different material types, see **Material types**

Expression type

Quria includes the following expression types:

- Listen to it
- Read it
- Touch it
- View it
- Unknown

You can select expression type manually, or click **Set expression type** to create the expression type based on the RDA content type that is selected. For instructions regarding which expression type that is to be entered for the different material types, see **Material types**

Contributors

Enter contributors that are important for identification of the expression, for example editors, translators, narrators or illustrators. Also used to indicate other authors for works with several authors.

All contributors that you enter are possible to search for in free text, and displayed under the expression on the page with the title details.

1. Click **Add contributor**. In the next step, select type of contributor – **Person**, **Organisation** or **Event**.
2. Enter the name of the contributor and select relator term.

Relator term is not a mandatory parameter but is recommended when cataloguing manually in order to make it easier to identify relations between creators/agents and expressions in Quria.

The relator term indicates what relation/function the creator has relative to the expression.

Instead of relator terms in plain language, relator terms according to the standard list MARC code list for relators are used in Quria. Search-term You can search for codes and terms in the **Relator term** field.

Note:
If there is no suitable relator term for the contributor that you want to add, you can enter any term in plain text under **Relationship**. When importing relator terms from subfield *#e (100, 110, 111, 700, 710)* in MARC21, these terms are added to the **Relationship** field.

For works with multiple authors, enter the first author as creator of the work. The other authors are listed on the expression level as contributors with the relator term **Author (aut)**.

Other languages

Enter other languages if the expression is multilingual. All languages that are entered under **Other languages** are visible and searchable in Arena.

Variant titles of the expression

When you describe a resource that includes an expression in multiple languages, enter the dominant language or first mentioned language for **Language**. Other languages can be listed under **Other languages**.

If the expression includes multiple languages and you prefer not to indicate a dominant language, you can select **Multiple languages** for **Language**, and then list all the languages under **Other languages**.

Used to describe variants of the expression title that need to be searchable.

Variant titles of expressions can for example be used to create search entries for parallel titles of the expression, expression titles in non-Latin script and constructed expression titles. See also: Using special characters

Note that spine titles, cover titles and similar are entered as variant titles on the manifestation level.

To enter original titles for a translation, see **Notes on resource** - **Original title** in the table below.

Notes on resource

Notes about expressions can be searched for in free text search.

1. Click **Add note**. You select type of note in the next step. You can select between a large number of note types.

Note:
The list of note types that can be selected is the same for works, expressions and manifestations. Because of this, you need to consider which on level the note applies. A note regarding physical form should, for example, be entered on the manifestation level, and not for the work or expression.

In the table below, you find explanations and tips about some common notes about expressions.

Note	Description
General	General note to be used for additional information about the expression that is not included anywhere else.
Language	Used to describe details about the language/languages in the expression. Can be used to indicate that the expression has parallel text. A language note can for example be used to describe which language the resource is translated from, in cases when original language and original title is not known.
Responsible	Can be used for additional information about one or several agents, persons or institutions that are co-authors or contributors of the expression.
Original title	**Note**: Original title generally does not occur within FRBR, but is replaced by the work title concept. Note about original title can be used in cases when the described resource is translated and the original title (the actual work title) is unknown. Then, enter that the original title is unknown as a note.

Adding a manifestation

1. Go to **Collections** and search for the work and expression for which you want to add a manifestation.
2. In the context menu for the expression, click **Add manifestation**. Detailed information about the different fields:

Title proper

Information about the main title of the manifestation.

If the manifestation you are describing has a parallel title, enter this under **Variant title**.

Other title information

Information about other title information.

If the resource you are describing has several subtitles, enter these under **Other title information** for the manifestation, not as work- or expression titles.

Name of part

Enter one or several titles of a part, section or supplement if the manifestation is a part of a work that consists of several parts.

See also: **Multi-volume sets**

Number of part

Enter one or several designations of a part, section or supplement.

A part number consists of a numerical or alphabetical designation, for example *Part 3*.

See also: **Multi-volume sets**

Number of non-filing characters

Enter the number of characters to be excluded for filing of the main entry.

Set the value to the number of preceding characters to be excluded. Used to exclude introductory definite and indefinite articles such as *The*, *A*, *Le*, *Les*, *Der*, *En*.

The information about number of non-filing characters is applied when the main entry is used for arrangement, for example when printing labels or checking in using self-service machines.

Variant title

Variant titles of a manifestation are used to describe variants of the manifestation title that need to be possible to search for. Variant titles can for example be used to create search entries for spine titles, cover titles, alternative titles, corrected titles or parallel titles of the manifestation.

> **Note:**
> Additional details regarding the variant title, such as information if it is a spine title or a cover title, can be entered under **Notes on resource**.

Statement of responsibility

Enter statement of responsibility for the manifestation. The information is usually to be entered as it is found in the source (the title page of the manifestation).

If the statement of responsibility contains several origins with different functions, you can use ISBD punctuation to indicate subsequent origins, for example:

by Kirsten Ahlborg ; illustrations: Jon Ranheimsæter

> **Note:**
> This field cannot be searched for in free text search i Quria. Origin that is of importance for identification of the resource is entered on the work- or expression level (creators, translators, editors, illustrators etc).

Shelf mark

Manifestation shelf mark is primarily used for arrangement - sorting books on the shelf.

Shelf mark is not to be confused with classification that is not only used for arrangement on shelves but to supply a more specific description of the subject of the resource.

> **Note:**
> When you create a new item in Quria, an item shelf will be proposed by Quria, based on the manifestation shelf mark.

Target audience

Select target audience for the manifestation in the dropdown. Target audience for the manifestation in Quria is based on codes according to **MARC target audience codes**.

Target audience for the manifestation can be searched for and is displayed as a facet in the Quria collections.

> **Note:**
> Target audience is entered her only for this specific manifestation. To enter a target audience for the entire work, use the genre for the work, if possible.

Literary form

Select literary form in the dropdown. Literary form for the manifestation in Quria is based on codes according to **MARC literary form codes**.

Literary form for the manifestation can be searched for and is displayed as a facet in the Quria collections.

> **Note:**
> It is only possible to make fine division of fiction in this field, not of non-fiction. In cases where specification of form is required for non-fiction, use the genre for the work.

Edition

Enter the edition of the manifestation. In cases where repeated information about edition or printing is to be entered, you can use ISBD punctuation to separate the information.

Publication information

Click **Add**. You create the publication information by selecting **Location**, **Organiser/agent**, **Organiser/agent type**, **Year** and **Name** in the next step.

Location

As you type, matching locations in the collection will be displayed. This works as a register in Quria and is used to avoid that duplicates are created. If the location you want to add is not already in the collection, click **Add**.

Location is an entity in Quria’s linked data format. Because of this, location is not only used for place of publication in Quria, but the same entity can be used to describe for example the subject of the resource.

When you add a new location or edit an existing location, you can enter additional details required for the description, such as specification of area, references and superordinate or subordinate terms.

Organiser/agent

As you type an organiser/agent, matching institutions in the collection will be displayed. This works as a register in Quria and is used to avoid that duplicates are created. If the organiser/agent you want to add is not already in the collection, click **Add**.

Organiser/agent is an entity in Quria’s linked data format. The entity is not only used for publishers in Quria, but the same entity can also be used to enter an institution as creator of the work.

When you add a new organiser/agent or edit an existing one, you can enter additional details required for the description, such as references or superordinate denominations.

Organiser/agent type

Organiser/agent type is not a mandatory parameter but is recommended when cataloguing manually in order to make it easier to identify relations.

Select an appropriate term in the dropdown. The term indicates what kind of relation/function the agent has to the manifestation, such as publication or manufacture.

Year

Enter the year of the publication of the manifestation.

Name

This is a display name.

International standard numbers

International standard numbers are used to identify the manifestation and to distinguish it from other manifestations, for example ISBN, ISSN, ISMN or EAN.

1. Click **Add**. You enter the value/standard number in the next step. You can also define what kind of standard number it is in the **Scheme** field, for example ISBN or EAN.

The parameters **Assigner** and **Qualifier** are usually not used when cataloguing manually.

RDA media type

Media type according to RDA indicates what kind of device that is needed to see, play or display the content of the resource. The media types are associated with the carrier types and can be seen as superior to these.

You find instructions for which media type that is to be entered for different material types under **Material types**.

RDA carrier type

Carrier type according to RDA indicates physical media for storage and the device needed to see, play or display the content of the manifestation.

You find instructions for which carrier type that is to be entered for different material types under **Material types**.

Manifestation type

The manifestation types in Quria can be set manually, but can also be generated based on selected media type and carrier type. Click **Set manifestation type** to let Quria generate the manifestation type.

If you want to set the manifestation type manually, or select a different one than the one suggested by Quria, make a selection in the dropdown.

Each manifestation type is represented by an icon of its own in Quria. The manifestation types can be searched for in the collections and the icons are displayed in the search hits.

The manifestation types in Quria are mapped to the material types in Arena.

Note:
You find an overview of all manifestation types that are available in Quria under **Settings**/**Metadata and items**/**Manifestation types**.

You find instructions for which manifestation type that is usually entered for different material types under **Material types**.

Extent

The extent of the manifestation is the number and the type of units (for examples *2 vol.*) or subunits (*30 pages*) that a manifestation consists of.

Also enter included materials as attachments, for example a musical CD with comments/booklet with lyrics or computer game with included tutorial.

If more than one piece of information regarding extent is needed, use comma to separate the pieces.

Note:
You also enter that a resource contains illustrations under **Extent**, for example:
126 p, ill.
126 p, 1 map

Duration

The duration of the playing time can be entered for manifestations such as sound recordings moving images and sheet music, and is often entered in hours and minutes.

Caption

This parameter is usually not used when cataloguing manually.

Player type

The player type of the manifestation can include information such as console for computer games, for example:

Xbox 360

Format

Information about the format of the manifestation, for example video format for DVD and Blu-Ray if the manifestation is a movie.

Accession date

Accession date is used for news lists in Arena. The accession date is generated in Quria when a location is added for the first item of a new title. This is done automatically and does usually not need to be used or entered when cataloguing.

You can delete the accession date from the manifestation in Quria in case you do not want a title to be listed in the news list. The title is then removed from the news list.

URLs

You can enter a URL to refer to a web site that contains or describes the manifestation. You can also enter URLs to other web sites with related information.

> **Note:**
> URLs for imported eBooks and eAudiobooks with a URL to an external eBook service are also displayed here.

Image/document (reference)

Images, for example photos, can be connected to catalogue records and also be displayed and searched for by Arena users. This function can also be used to upload a cover image to the work.

See also: **The image archive**

Series

The series information states the series affiliation of the manifestation, numbered or unnumbered, that exists in the resource.

1. Click **Add**. As you type the name of the series, matching series in the collection will be displayed. This works as a register in Quria and is used to avoid that duplicates are created. If the series you want to add is not already in the collection, click **Add**.

When you add a new series or edit an existing one, you can enter additional details about the name of the series that are required for identification, for example ISSN, parallel series titles, subtitles of the series or the name of the series in non-Latin script.

Record type is usually not used when adding a new series.

You can also state which number in the series that the manifestation has, and if the series is a subseries.

The series information is displayed on the title details page, and under the information about the work. If you click the series information, an overview of all parts of the series that are included in the collections is displayed in a new window, and you can open the works of the different parts.

> **Note - information in Swedish only, as this note is relevant for Swedish customers only and the terminology will rather create confusion if translated:**
> Läsordning (kallas även fortsättningsverk eller litterära serier) är en uppgift som inte nödvändigtvis hänger samman med en tryckt serieuppgift. Information om läsordning anges i Libris enbart som anmärkning/fritext, och det är därför inte möjligt att skapa länkade data av själva numreringen.
>
> Av denna anledning finns inte numrerad läsordning annat än som anmärkning på manifestationen i Quria. Däremot finns det möjlighet att skapa länkning/relation i Quria mellan de verk som utgör fortsättningsverk/har läsordning. Då används relationstypen **Fortsättes av/Fortsätter**. Se även: **Relationships between works**

Intended audiences

Used for comments or to express more specific information about intended audiences, where the options that can be selected under **Target group** is not sufficient.

Notes on resource

Notes about manifestations can be searched for in free text search.

1. Click **Add note**. You select type of note in the next step. You can select between a large number of note types.

> **Note:**
> The list of note types that can be selected is the same for works, expressions and manifestations. Because of this, you need to consider which on level the note applies. A note regarding physical form should, for example, be entered on the manifestation level, and not for the work or expression.

In the table below, you find explanations and tips about some common notes about manifestations.

Note	Description
General	General note to be used for additional information about the manifestation that is not included anywhere else.
With	Used to describe additional parts that are part of the described resource.
Edition	Used for information about the edition, such as irregularities in numbering or publication patterns.
Additional physical form	Information about other physical forms in which the described resource is available.
Binding	Information about binding.
Source	Information about from where information of the description of the resource is fetched.

Material types

You find guidance and instructions for which different content types, media types and carrier types according to RDA that apply to different material types below. The tables also include instructions for work types, expression types and manifestation types in Quria.

The instructions only cover the most common material types.

Audiobook

Voice recording of books, are available on physical carriers (CD, MP3)

Level	Parameter	Type
Work	Type	Words
Expression	RDA content type	Spoken word (spw)
	Expression type	Listen to it
Manifestation	RDA media type	Audio (s)
	RDA carrier type	Audio disc (sd)
	Manifestation type	For audiobook on CD, select manifestation type: Audiobook - CD. For MP3, select manifestation type: Audiobook - MP3

Book (printed monograph)

This includes books, booklets, brochures etc.

Level	Parameter	Type
Work	Type	Words
Expression	RDA content type	Text (txt)
	Expression type	Read it

Level	Parameter	Type
Manifestation	RDA media type	Unmediated (n)
	RDA carrier type	Volume (nc)
	Manifestation type	Book

Book and audiobook on CD (bundle)

Please note the difference between a bundle (a book and an audiobook considered as two equivalent parts) and a book with a CD as a supplement. Bundle is only to be used when the included objects are considered equivalent. The manifestation type Book and CD is available in Quria but currently, there is no support for specifying any of the other content types, media types or carrier types for a manifestation. When cataloguing bundles with several equivalent parts, for example a printed book and an audiobook, enter the types as unspecified.

In other cases: catalogue according to the main material type and enter the other objects as supplements under Extent for the manifestation.

Level	Parameter	Type
Work	Type	Words
Expression	RDA content type	Other (xxx)
	Expression type	Unknown
Manifestation	RDA media type	Unspecified (z)
	RDA carrier type	Unspecified carrier (zu)
	Manifestation type	Book and CD

eAudio

Level	Parameter	Type
Work	Type	Words
Expression	RDA content type	Spoken word (spw)
	Expression type	Listen to it
Manifestation	RDA media type	Computer (c)
	RDA carrier type	Online resource (cr)
	Manifestation type	eAudio

eBook

Level	Parameter	Type
Work	Type	Words
Expression	RDA content type	Text (txt)
	Expression type	Read it
Manifestation	RDA media type	Computer (c)
	RDA carrier type	Online resource (cr)
	Manifestation type	eBook

Talking book - audio disc

Level	Parameter	Type
Work	Type	Words
Expression	RDA content type	Spoken word (spw)
	Expression type	Listen to it
Manifestation	RDA media type	Audio (s)
	RDA carrier type	Audio disc (sd)
	Manifestation type	Talking book

Periodical

Note:
A work of type **Periodical** cannot be changed to another work type if issues are connected to the work.

Level	Parameter	Type
Work	Type	Periodical
Expression	RDA content type	Text (txt)
	Expression type	Read it
Manifestation	RDA media type	Unmediated (n)
	RDA carrier type	Volume (nc)
	Manifestation type	Periodical

Musical recording - CD

Level	Parameter	Type
Work	Type	Music
Expression	RDA content type	Performed music (prm)
	Expression type	Listen to it
Manifestation	RDA media type	Audio (s)
	RDA carrier type	Audio disc (sd)
	Manifestation type	CD

Printed music (notated music)

Level	Parameter	Type
Work	Type	Music
Expression	RDA content type	Notated music (ntm)
	Expression type	Read it
Manifestation	RDA media type	Unmediated (n))
	RDA carrier type	Volume (nc)
	Manifestation type	Printed music

Movie (videodisc)

Level	Parameter	Type
Work	Type	Moving image
Expression	RDA content type	Two-dimensional moving image (tdi)
	Expression type	View it
Manifestation	RDA media type	Video (v)
	RDA carrier type	Videodisc (vd)
	Manifestation type	Videodisc

Board game

Level	Parameter	Type
Work	Type	3D-bild
Expression	RDA content type	Three-dimensional form (tdf)
	Expression type	View it
Manifestation	RDA media type	Unmediated (n)
	RDA carrier type	Object (nr)
	Manifestation type	Game

Computer game

Level	Parameter	Type
Work	Type	Computer file
Expression	RDA content type	Computer program (cop)
	Expression type	Unknown
Manifestation	RDA media type	Computer (c)
	RDA carrier type	Computer disc (cd)
	Manifestation type	It is possible to choose between the unspecific manifestation type Computer game, or a more specific manifestation type such as XBox game or Playstation game. If you select manifestation type Computer game, you can enter information about consoles (*Xbox 360*, *Playstation 4* or similar) under **Player type** for the manifestation.

Map

Level	Parameter	Type
Work	Type	Map
Expression	RDA content type	Cartographic image (cri)
	Expression type	View it
Manifestation	RDA media type	For maps, atlases and globes, select Unmediated (n). For maps saved as digital files, select Computer (c)
	RDA carrier type	For single printed or drawn maps, select Sheet (nb). For atlases, select Volume (nc). For globes, select Object (nr). For digital files with remote access via Internet, select Online resource (cr).
	Manifestation type	Map

Object

Level	Parameter	Type
Work	Type	3Dimage
Expression	RDA content type	Three-dimensional form (tdf)
	Expression type	View it
Manifestation	RDA media type	Unmediated (n)
	RDA carrier type	Object (nr)
	Manifestation type	Object

Multi-volume sets

A multi-volume set is a monograph resource that is completed or intended to be completed with a defined number of parts.

Multi-volume sets can be catalogued in Quria according to two different methods:

- The single work method
- The separate works method

You are free to choose between these methods when you catalogue manually. For guidance, please have a look at the pros and cons below.

When importing records from external sources, it is the cataloguing method of the imported record that controls how a multi-volume set is presented in Quria.

Which method to choose at manual cataloguing is determined depending on whether the parts of the multi-volume set have distinct titles or not. A title is considered distinct only if it contains one or several meaningful words or terms. Single numeric or alphabetic characters are not considered as a distinct title.

Example:

Part 1 or *Volume 3*, not considered distinct titles.

When Sweden became an empire or *Greatness and decline*, considered distinct titles.

The single work method

If the parts lack distinct titles, the single work method is used. In this case, you create a work that includes the entire work title in Quria, and the separate parts form manifestations.

Example: The single work method with non-distinct part titles

Work title:	*Collected works of William Falkner*	
	Manifestation's name of part:	*Part 1*
	Manifestation's name of part:	*Part 2*

Note:
This method can also be used even if the parts have distinct titles - it is up to you, performing the cataloguing.

Example: The single work method with distinct part titles

Work title:	*Lord of the rings*	
	Manifestation's name of part:	*The fellowship of the ring*
	Manifestation's name of part:	*The two towers*
	Manifestation's name of part:	*The return of the king*

The separate works method

If the parts have distinct titles, you can also use the separate works method. Each part is then considered as an individual work, and the different parts are connected using a series title.

Example: The separate works method

Work title:	*The fellowship of the ring*	
	Manifestation's series information:	*Lord of the rings, part 1*
Work title:	*The two towers*	
	Manifestation's series information:	*Lord of the rings, part 2*
Work title:	*The return of the king*	
	Manifestation's series information:	*Lord of the rings, part 3*

Pros and cons of the different methods

Since both methods can be used when cataloguing a title with distinct part titles, a clarification of the pros and cons may be useful.

The single work method

Pros: The title details provide a complete overview of all parts and their availability.

Cons: It is not possible to make reservations on expression level. Since each part is a manifestation of its own, reservations have to be made on the manifestation level.

The separate works method

Cons: It is not possible to get a complete overview of the title details and availability of all parts at once, as each part is a work of its own.

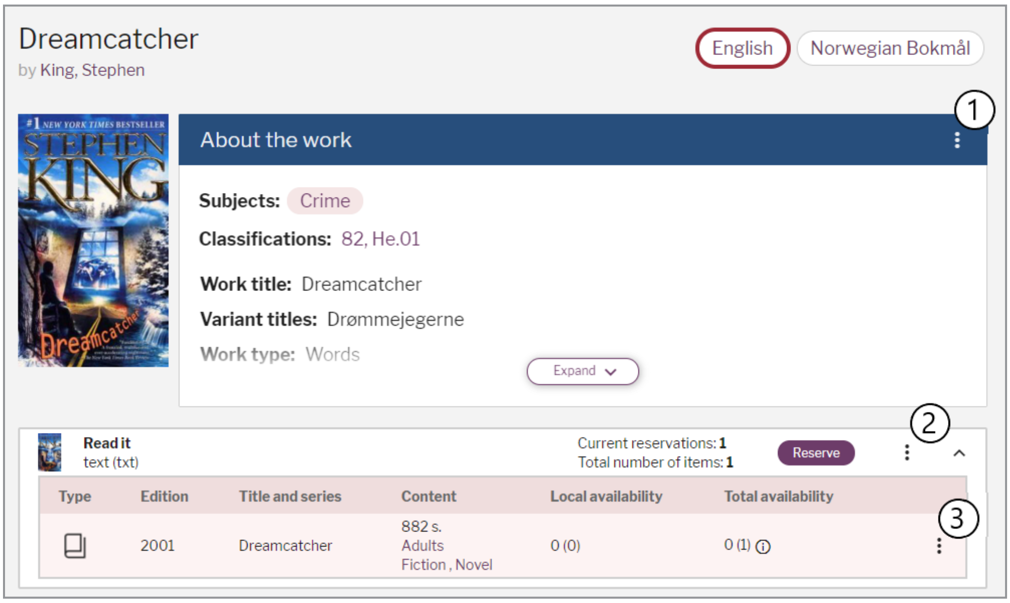
Adding an item

You add new items of a title by clicking the context menu for a manifestation or from the manifestation details window.

1. Click **Add item**.
2. Fill in the relevant basic information:
    - Item type
    - Item receipt type: Indicates how the item was obtained, e.g. gift, deposit or exchange. Only available if settings for item receipt types have been made.
    - Price: You can set a price here, that is different from the price set in **Acquisitions**. It is the item price that will be used for example to calculate a replacement charge.
    - Internal note (will appear in the item details)
    - External note (will appear in Arena and in self-service machines)
3. Fill in the relevant location information:
    - Home branch (mandatory)
    - Department
    - Section
    - Shelf (the shelf information from the manifestation is given as default)
4. Include in news lists: For the very first item that you add, you can check this box to set today as accession date, used to create news lists in Arena. Not applicable to periodicals.
5. Choose if you want to add a single item (can be done repeatedly), a sequence of items or a depot item. For a sequence of items, also add the number of items that should be created. For depot items, specify the ILL supplier and the expiry date. Also enter the item number or generate it.
6. Enter barcodes by scanning an existing barcode or by generating barcodes. When adding a sequence of items, the scanned or generated barcode will be used for the first item, and then the following items will get the next number in the sequence, based on the first one. The barcode is used as item number.
   You can also add items without barcode.
7. If needed, click **Print spine label** to print the small label for the spine.
8. If needed, click **Print bibliographic label** to print the barcode label for the back.
9. Click **Add**.
10. If you want to add more items for the same title, change the information if needed, scan or generate barcodes, and click **Add**.
11. Click **Close** when you are done.

Editing record data (metadata)

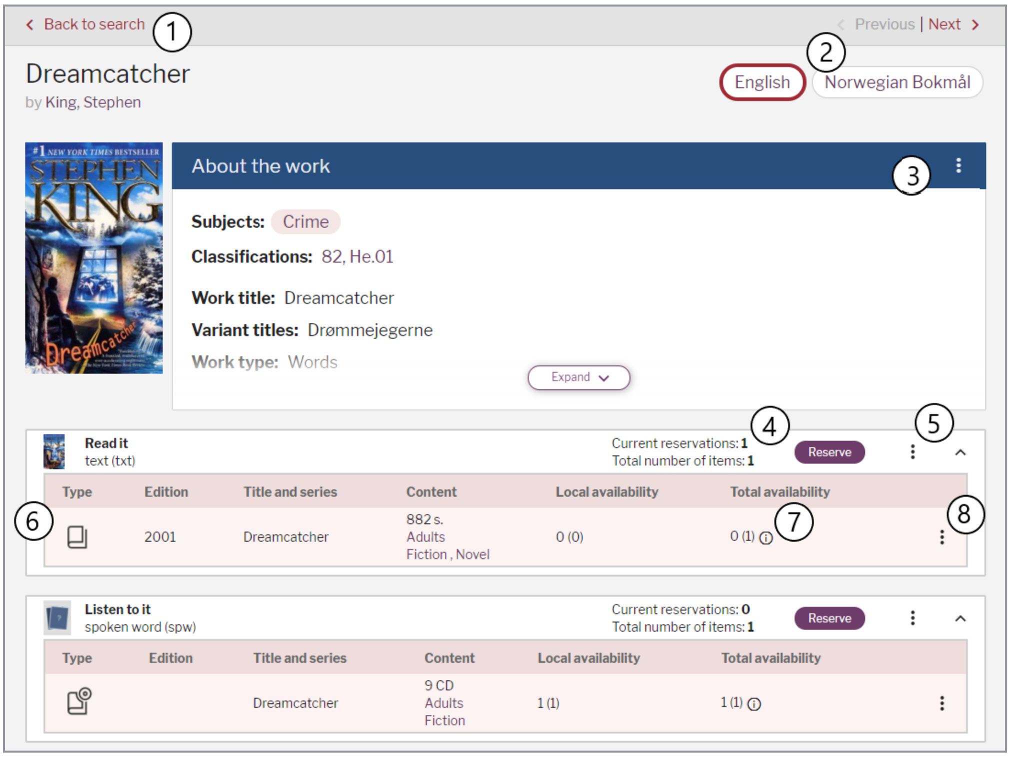
You can use the context menus from the title details page to edit record data on different levels. Only users with permission to edit record data can see the menus.



1	Edit work	Click the context menu and select **Edit work**.
2	Edit expres-sion	Click the context menu and select **Edit expression**. You can also edit the expression from the **Edit work** window.
3	Edit mani-festation	Click the context menu and select **Edit manifestation**. You can also edit the manifestation from the **Edit expression** window.

The title details

The title details page opens when you click a title in the search results. The buttons available depend on the permissions of the current user.



1	Click **Back to search** to go back to the search results.
2	If the title exists in other languages, these are presented here and you can click on a language to open the title details for that language.
3	About the work: A summary of the work, including description. Click the context menu to view all raw data about the title, to edit the work or to add an expression.
4	The total number of items and number of reservations in the consortium, and you can also click the button to make a reservation.
5	Click the expression context menu to edit or delete the expression, or to add a manifestation.
6	Click the row to display the details about the manifestation. If the title is part of a series, you can click the name of the series here to display the full list of the titles in this series. If the title exists in different formats - text (Read it), spoken word (Listen to it) and film (View it) - these are listed in different blocks.
7	Local availability: How many of the total number of items are available at this library. Ex. 2(5) means two of the five items are available. Total availability: How many of the total number of items are available in the consortium. Ex. 3 (7) means three of the seven items are available somewhere in the consortium. Hovering with the mouse over the information icon (i) next to the numbers, lists to which of the libraries in the consortium the items belong.
8	Click the manifestation context menu to add a new requisition, add new item or edit or delete the manifestation.

Relationships between works

Works can be related in many different ways, for example novels that are to be read in a specific order, a collective work with parts that have been published separately or songs on a compilation disc.

Please note that series are not considered as relations between works. This is defined for the manifestation of a work, while the other relationships are defined on the work level. This topic describes relationships on the work level only.

Relationships can be defined automatically during import or updates of works, or manually. Imported records that include several link fields (MARC 21 7XX) will result in imported data that is displayed in the information of the work. The data is displayed as free text. A link to a related work is created manually by editing the information.

You add relationships manually by clicking **Add relationship** when editing the details of a work. As you start typing a title in the **Related work** field, matching titles will be listed for selection. Please note that it is the work titles that are searched for, so if you for example enter a translated title, you might not find it in the list.

The following relationships between works can be defined:

Relation	
Has part	Is part of
Continues	Continued by
Has adaptation	Is an adaptation of
Has a supplement	Supplements
Has a complement	Complements
Has a summary	Is a summary of
Has transformation by genre	Is a transformation of genre
Has an imitation	Is an imitation of
Has a relation to	

In addition to linking to an existing work, it is also possible to enter the creator and title of the related work as free text. The information will be shown on the work page - a linked work as a clickable link and free text information as plain text. If you have linked to an existing work and also added free text information, the link to the related work will be displayed.

Finding and editing item details

You can find out details about an item in different ways.

Finding out details by searching

1. Search the collection and open the title details page.
2. Click the manifestation row to open the details window.
3. Click the **Items** section.
4. Click the expand icon to open the item details.
5. To edit details of a section, click the pen in the upper right corner of that section.

Finding out details by scanning

1. Scan the item.
2. Click the expand icon to open the item details.
3. To edit details of a section, click the pen in the upper right corner of that section.

The item details

The item details open when you select a manifestation in the collection and click it.

The item details page contains three tabs: **Items** (described below), **Reservations** where you can monitor and update current reservations and **Record data** that provides and overview of the metadata for the expression and manifestation.

When you click the expand icon for a row under **Items**, you find a number of sections. Only fields with values are shown.

To edit details of a section, click the pen in the upper right corner of that section.

Item details

This section shows:

Basic information

- Item number (used as item number in the system)
- Price - you can enter a price that is different from the price set in Acquisitions, and it is then this price that will be used for example to calculate a replacement charge.
- Item type
- Item receipt type
- Internal note
- External note

Location

- Home branch
- Department
- Section
- Shelf

There are buttons to print a bibliographic label, print a spine label and program an RFID tag.

Temporary location

This is where you specify a temporary location for an item.

See also: **Temporary location of an item**

Statistics

This section shows statistics for this item:

- Total number of loans
- Number of loans this year
- Item created date
- Latest activity date

View transaction log

When you click **View transaction log** a list of all transactions for this item opens.

It shows transaction type, library and date for the events such as check in and check out, temporary location, transfer and internal handling.

> **Note:**
> For check in transactions, the patron name will be shown for a set period, to be able to track the patron if something is wrong with the item. The patron name will be cleared automatically when set period has passed. The default period is one day and is set by Axiell at installation of Quria.

Item status

Some statuses can be added manually (for example when an item is lost). This section shows the current manually added status for the item.

Click the pen in the top right corner to edit the status manually. An item with a manually added status cannot be reserved, does not appear as available in the public portal and is not available in the shelf list.

When an item with a manually added status is checked in, checked out or renewed, its status is removed.

Use of item

Some statuses are set by the system (for example On loan or In transit). The system statuses are displayed in the transaction log and in a number of other places. This section shows different data depending on status.

- On shelf: details about last check-in
- On loan: details about the current loan
- In transit: the library from where the item is transferred, the destination library and details about last check-in
- On reservation shelf: details about last check-in and trapped reservation

Secondary item numbers

Under some special circumstances, multiple item numbers may be imported to Quria during migration. All item numbers can be searched for in the circulation windows and when using self-service. The secondary item numbers can be displayed by clicking **Secondary numbers** in the item details, and can be deleted from there. It is not possible to add new item secondary item numbers.

> **Note:**
> Depending on the data quality in the migrated data, duplicates might exist in the item numbers. If duplicates are noted, e.g. the wrong item shows up when scanned, it is recommended to sort out the duplicates to avoid issues when checking out items. This can be done in **Collections/Items** by scanning the troublesome item number. You will then get all items connected to that item number.

Programming RFID tags

Single item

1. Open the item details.
2. Click **Program RFID tag**.
3. Place the item on the scanner connected to the device where you are working.
4. Click **Program**.

Multipart item

1. Open the item details.
2. Click **Program RFID tag**.
3. Check **Program multipart RFID**.
4. Type **Number of RFID tags**, that is, number of parts in the item.
5. Place all parts of the item on the scanner connected to the device where you are working.
6. Click **Program**.

Handling many items at the same time

At some point, you may want to edit the same piece of information for many items. This is possible using an item bulk handling operation. You can also select several items and export item data to a CSV file, to share with others or work with the data further on your own.

Only users with item bulk permissions have access to bulk operations functionality:

Bulk handling/Items: Bulk menu permission: Access to the section where several items can be handled in one operation

Bulk handling/Items: Bulk modify permission: Access to the **Change data** button on the **Items** tab

Bulk handling/Items: Bulk delete permission: Access to the **Delete items** button on the **Items** tab

The following applies for handling single items as well as bulk handling of items:

- Items that belong to your own account can be relocated and temporary located within the home account regardless of transaction status.
- Items that belong to your account can be relocated and temporary located to other accounts as long as the item has no transaction status or one of:
  - Available
  - In transit
  - Trapped (cancelled)
  - Trapped, in transit (cancelled)
  - Internal handling: ILL out cancelled
  - Bill paid
  - Received
- For incoming ILL items the following applies:
  - Can never be handled in **Collections**/**Items**
  - Cannot get a temporary location
  - Cannot get an updated item type

Selecting items for bulk handling

You can select items for bulk handling either by searching or by filtering.

1. Go to the **Collections** section in the main menu.
2. Click the **Items** tab.
3. Either enter a search query such as title or creator and press **Enter**, or use the filtering options under **Refine search** and click **Search**.
   You can also combine searching and filtering to narrow down the hits. For **Status**, **Department** and **Section** it is possible to also filter for items that have no setting defined, by selecting **Not set**.
4. In the list of all matching items, click the top check box to select all the items in the list, or select a few of the items that you want to handle.

Scanning items

You can select the **Scan items** option to scan one or several items, get them in your list and then handle them at the same way as when you search and filter for items.

Changing data for many items at the same time

You can choose between changing data related to home location or to set temporary location. You can also add or remove manual statuses.

Under **Change home location**, you can bulk change the following settings:

- Organisation
- Department
- Section
- Item type
- Shelf - item

For each field you can change value, leave as is and in some cases clear current value (department, section and item type). If you change organisation, the default choice for department/section will be **Clear value**. New values must be selected if wanted.

1. After having selected the items you want to handle, click **Change data**.
2. Select which settings you want to change and click **Change**.
3. Confirm your action.

The option **Change expiry date** is only available for items that are assigned a temporary location.

Exporting item data to a CSV file

1. After having selected the items that you want to export, click **Download as CSV**.

A CSV file is created in your **Downloads** folder.

Deleting many items at the same time

You cannot delete items that are on loan, have reservations, debts or unpaid bills.

1. After having selected the items you want to handle, click **Delete items**.
2. Confirm your action.

You get a confirmation of how many items were deleted and of how many items that could not be deleted.

> **Note:**
> You can only bulk delete items that belong to branches included in your user permissions. For example, if your current role is on branch level, you will only be able to delete items belonging to the branch you are currently signed in at.

Handling many reservations at the same time

You can easily search for reservations and modify or cancel several reservations using bulk handling operations. You can also export data for selected reservations to a CSV file, to share with others or work with the data further on your own.

You find the bulk handling functionality on the **Reservations** tab of the **Collections** page.

Only users with reservation bulk permissions have access to bulk operations functionality:

Bulk handling/Reservations: Bulk menu permission: Access to the section where several reservations can be handled in one operation

Bulk handling/Reservations: Bulk modify permission: Access to the **Change data** button on the **Reservations** tab

Bulk handling/Reservations: Bulk cancel permission: Access to the **Cancel reservations** button on the **Reservations** tab

Selecting reservations for bulk handling

You can select reservations for bulk handling either by searching or by filtering.

1. Go to the **Collections** section in the main menu.
2. Click the **Reservations** tab.
3. Either enter a search query such as title or creator and press **Enter**, or use the filtering options under **Refine search** and click **Search**.
   You can also combine searching and filtering to narrow down the hits.
4. In the list of all matching reservations, click the top check box to select all the reservations in the list, or select a few of the reservations that you want to handle.

Changing data for many reservations at the same time

You can change pick-up branch and validity period for the selected reservations.

1. After having selected the reservations you want to handle, click **Change data**.
2. Select which settings you want to change and click **Change**.
3. Confirm your action.

Cancelling many reservations at the same time

You cannot cancel reservations that are completed.

1. After having selected the reservationsyou want to cancel, click **Cancel reservations**.
2. Confirm your action.

You get a confirmation of how many reservations were cancelled and of how many reservations that could not be cancelled.

Exporting reservation data to a CSV file

1. After having selected the reservations for which you want to export reservation data, click **Download as CSV**.

A CSV file is created in your **Downloads** folder.

Temporary location of an item

A temporary location can be used to, for example, gather items related to a certain topic at a special place in the library for a limited time period.

This is how you register an item on a temporary location:

1. Go to the item details.
2. Find the **Temporary location** section.

3. Select Account, Authority, Home branch, Department, Section, Shelf, Item type and Expiry date for the temporary location.
4. Click **Save**.

When an item is scanned in the **Check in** window and the expiry date for temporary location has passed, the temporary location is removed and the item gets its ordinary location again. If you want an item to be assigned its ordinary location next time it is scanned, then enter today's date as expiry date. Temporary location cannot be cleared using the bulk handling functionality - the items have to be scanned.

Moving an item to another manifestation

There might be situations where items have been connected to the wrong manifestation. Users with the **Collections** - **Move items** permission have access to a **Move item** button in the manifestation context menu in order to adjust this.

You can move items that belong to your own account, and have no transaction status or one of the following:

- Available
- In transit
- Trapped (cancelled)
- Trapped, in transit (cancelled)
- Internal handling: ILL out cancelled
- Bill paid
- Received

Perform the following steps to move an item from one manifestation to another:

1. Find the item that is connected to the wrong manifestation and take a note of its item number.
2. Find the manifestation that the item should belong to, and in the manifestation context menu, select **Move item**.
3. In the dialog that opens, enter the item number of the item that should be moved and click **Move**.

Periodicals

Periodicals can be for example monthly magazines or quarterly journals, where an issue typically represents a single issue of a certain year.

The work/expression/manifestation model used for other types of items is different when it comes to periodicals, in order to support years and issues. The special periodical structure is triggered by selecting **Periodical** for the work type.

Language variants of the same periodical work are not supported - in these cases, each language needs to be registered as a separate work.

Permissions

Handling of different parts of the periodicals flow is defined via roles:

- Add/edit/delete subscriptions
- Add/edit/delete publication patterns/plans

- Receive issues

Publication pattern

The publication pattern includes the expected delivery plan as well as the naming convention for the issues.

Publication plan

The publication plan consists of year/issue numbers with expected issue dates.

Subscriptions

You must always have a subscription that connects the expected delivery of issues with a supplier and, if you want to, a budget. You add suppliers and budgets under **Acquisitions and periodicals** on the Configuration page.

You can get an overview of subscriptions and periods from the **Subscriptions** tab of the Collections page. You can search for subscriptions, and limit the search result by filtering on organisation, department, supplier, budget and budget periods. You can download the search result by clicking **Download as CSV**.

Receiving issues

The issues that are published within the subscription period are available for selection when clicking **Receive issue**.

The issue details

When you click a specific periodical issue in the list, the details window opens.

Items

Lists all items available at the library for this issue of the title; such as item number, location and item type.

You can reserve or delete an item using the context menu.

Click the expand icon to open the item details.

Click the **Add item** button to add new items for this issue.

Reservations

Lists the active reservations for this issue of the title.

Click the expand icon to find details about the reservation.

You can edit or cancel a reservation using the context menu.

Record data

Lists all record data for the main expression/manifestation that the issue is connected to.

Working with periodicals

Note:
A periodical work is handled somewhat different than other works. A periodical work contains one base expression and one base manifestation that contains the overall title information. It also contains years and issues that are special variants of expressions and manifestations. The years/issues are the ones you can see when you open a work; the base expression/manifestation can be found in the work context menu.

Adding a periodical

Periodicals are added to Quria in the same way as other works, but the work type has to be set as **Periodical**. When you have added a work, an expression and a manifestation for a periodical, and open the work, you see the buttons **Periodical details** and **Receive issue** under About the periodical. **Receive issue** becomes active after adding periodical details. If no periodical details are registered, the **Add issue** button is available and can be used if you want to add an issue manually.

Click **Periodical details** to set up the publication pattern, publication plan and subscriptions for the periodical.

Publication pattern

A publication pattern is not mandatory, but can be useful when you expect many issues.

1. Click the pen to edit or add a publication pattern.
2. Define number of instances on different levels, and if the numbering should be ongoing or restarted when the maximum number is reached. You should not add the year here - it is defined later in the publication plan. If you fill in all three levels, you will get a numbering that can look something like this: 2020:1:21:5.
3. Select a delivery scheme and specify its details, for example **Monthly based on weekday**, such as the third Thursday every month except in July.

> **Note:**
> If you edit the publication pattern for a periodical, you need to regenerate the publication plan to reflect the changes.

Publication plan

1. Click **Generate publication plan** and fill in the values. When you fill in a year, you will be proposed with January 1 for the first issue and December 31 for the last issue, but the dates will be adjusted according to what you filled in for the delivery scheme. As long as no issues are received for a certain year, the publication plan can be regenerated.
2. Fill in the start values for the specific year to generate a plan according to the levels in the publication pattern.

> **Note:**
> At the end of the year, you can run the year end process for periodicals to generate publication plans for the next year. See also: Year end processes

Subscriptions

The supplier and budget need to be registered before connecting them to a subscription, under **Acquisitions and periodicals** on the Configuration page.

1. Click **Add subscription**.
2. Fill in the supplier information.
3. If you want to, fill in the budget and periods information.
4. Fill in the location and item information.
   Item type and **Second item type** can be used to for example prevent the latest issue of a periodical from being borrowed, but as soon as there is a more recent issue, automatically assign it another item type (such as weekly loan). The item types are created under **Metadata and items** on the Configuration page, and then rules are used to control each item type. You can also set if items should be created when an issue is received.

Receiving issues

Once you have created a publication plan and a subscription, you can start to receive and register issues.

1. Click **Receive issues** under About the periodical on the work page.
2. Select the correct numbering for this issue.
3. Click **Register**.
4. If items should be registered, the **Add item** dialog is presented. Generate a barcode and check that the rest of the information is correct.
5. Click **Save**.

You now see the item listed on the work page, and you can scan the barcode to make reservations, loans etc.

Adding, editing and deleting issues

You can manually add an issue without using a publication plan by clicking **Manually add issue** in the Publication plan view.

You can edit or delete individual issues using the context menu for an issue in the publication plan.

If you haven't created a publication plan, you can add issues under About the periodical on the work page. Then select **Add item** in the context menu to add the physical issue. The **Add issue** button is only available if no periodical details are registered.

Periodical reminders

You can set up reminders for the case when periodical issues have not been received according to the publication plan.

1. In the periodical supplier information, that you find under **Subscriptions** in the Periodical details page, enter how many days to wait after not receiving a planned issue before a reminder is to be sent. Also make sure that there is an email address registered for the supplier.
2. Define a notification contact for acquisitions and periodicals under **Circulation and notifications** on the Configuration page. This is where you add a **Sender email** - an address to the someone at the library that handles periodicals. If you do not define a specific notification contact for periodical reminders, the default contact will be used.
3. Check that there is a suitable message text for Periodical reminder under **Circulation and notifications** on the Configuration page. If not, click **Add custom text** and add one.
4. Make sure that the scheduled job **Generate reminders for periodicals**, that you find on the **Admin** tab of the Configuration page, is enabled.

Deleting a periodical

1. Under About the periodical on the work page, click **Periodical details**.
2. Click **Delete periodical**. This button is enabled only when all subscriptions have been deleted.

All periodical details including publication pattern and publication plans will be deleted.

Deleting an issue

To be able to delete an issue, you first need to delete its items and reservations.

Searching for subscriptions

You can filter and search for subscriptions on the **Subscriptions** tab of the Collections page.

Handling periodicals after migration to Quria

Note:
A periodical work is handled somewhat different than other works. A periodical work contains one base expression and one base manifestation that contains the overall title information. It also contains years and issues that are special variants of expressions and manifestations. The years/issues are the ones you can see when you open a work; the base expression/manifestation can be found in the work context menu.

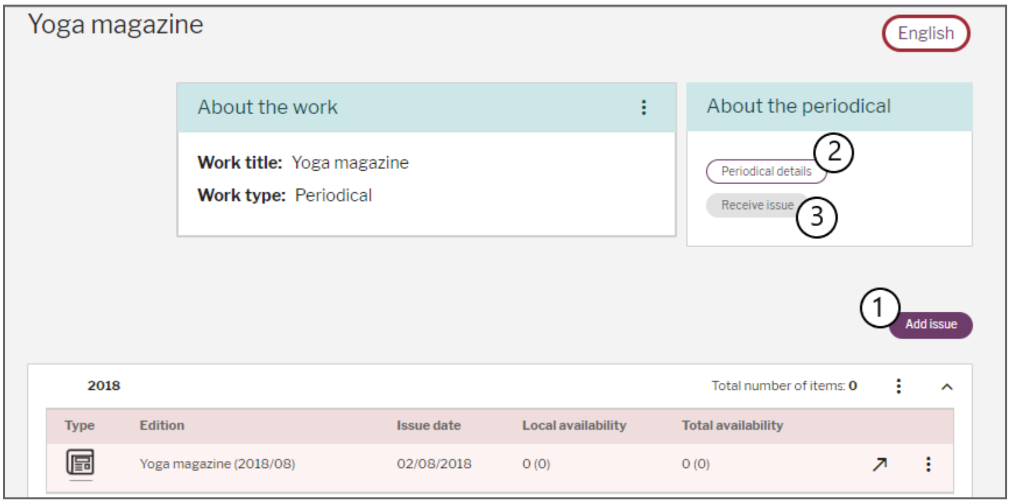
Normally, periodicals are handled using publication patterns and plans, but for periodicals that are converted from a previous library management system, some manual handling may be required, described below.

See also: **Working with periodicals**

Converted periodicals

When periodicals are converted from a previous system, and if no publication patterns and plans are in place, issues can to be added to the periodical work in collections manually.

This is what a converted periodical may look like:



Adding issues to converted periodicals manually

You can recognize the converted periodicals by the **Add issue** button (marked **1** in the image above) just above the items.

Adding publication patters and plans for converted periodicals

When you continue using Quria after a migration, you should start to add publication patterns and plans. It is recommended that publication patterns and plans are in place before the end of the year.

1. Click **Periodical details** (marked **2** in the image above).
2. Click the pen to add a publication pattern.
3. Define number of expected issues in **Level 1**. For most publications in public libraries this level is enough, but you can add more levels, for example volume. See also: **Publication pattern**

4. Generate a publication plan for the current year. You do not have to enter exact dates for the first and last issue, this can be corrected later if needed. See also: **Publication plan**
5. Add subscriptions for the branches that have this periodical. You need to add a start date for the subscription - you can enter today's date or for example *January 1* this current year, as long as it is not in the future. Specify where the periodical is placed and add a rule that changes the lending rules automatically when a new issue arrives, if you want to. See also: **Subscriptions**

As soon as you have created these periodical details, the **Add issue** button disappears and you can no longer add issues this way. Instead, use the **Receive issue** button (marked **3** in the image above) that has become active, when the next issue arrives. The already registered issues can stay as they are. See also: **Receiving issues**

Moving and merging periodicals using the collections basket

In the special case when periodicals have been converted, you may end up with many instances of works for the same periodical.

If so, using the collections basket can be very helpful.

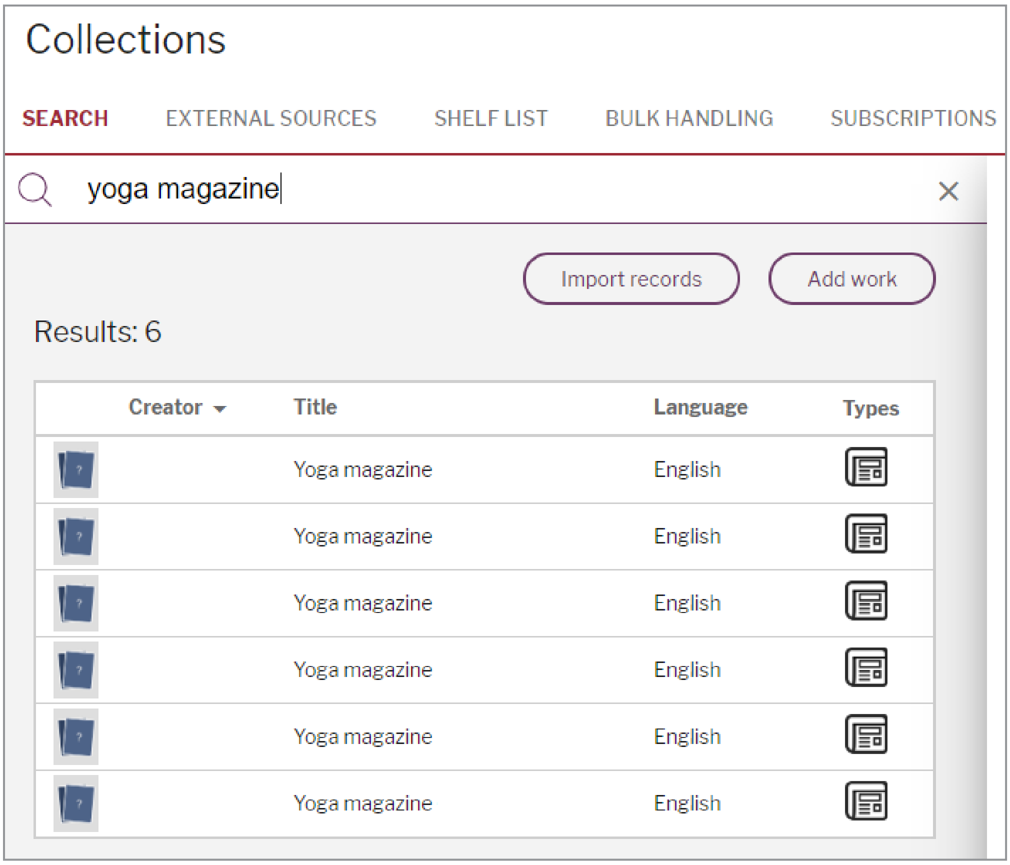
Potential problem

There are two main scenarios that are addressed in different ways.

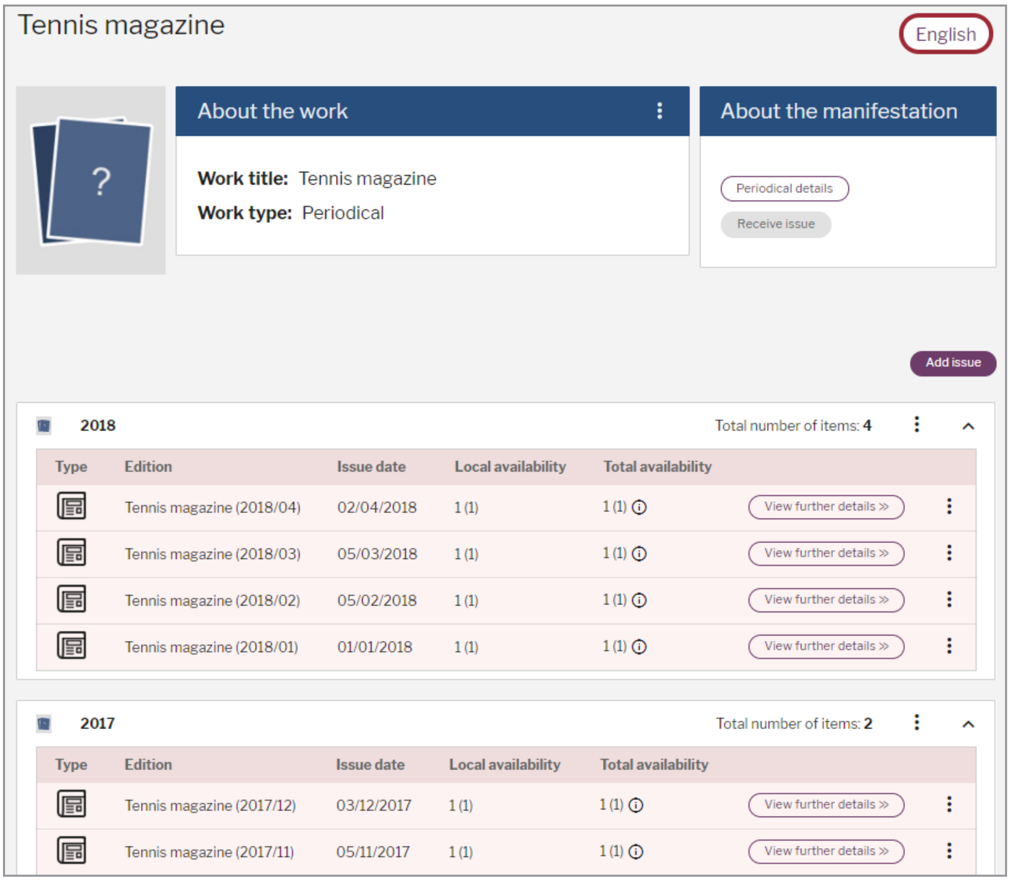
1. You have several works that contains different years that you want to collect under one work: Add the master work and the years from the other works to the basket, and then move the years to the master work
2. You have several works that contains the same years, and you want to merge the years under one work:
   Add the year in the master work and the years from the other works to the basket, and then merge the years to the year in the master work.

In this example, we have just imported a periodical that consists of some issue numbers from 2017 and some issue numbers from 2018.

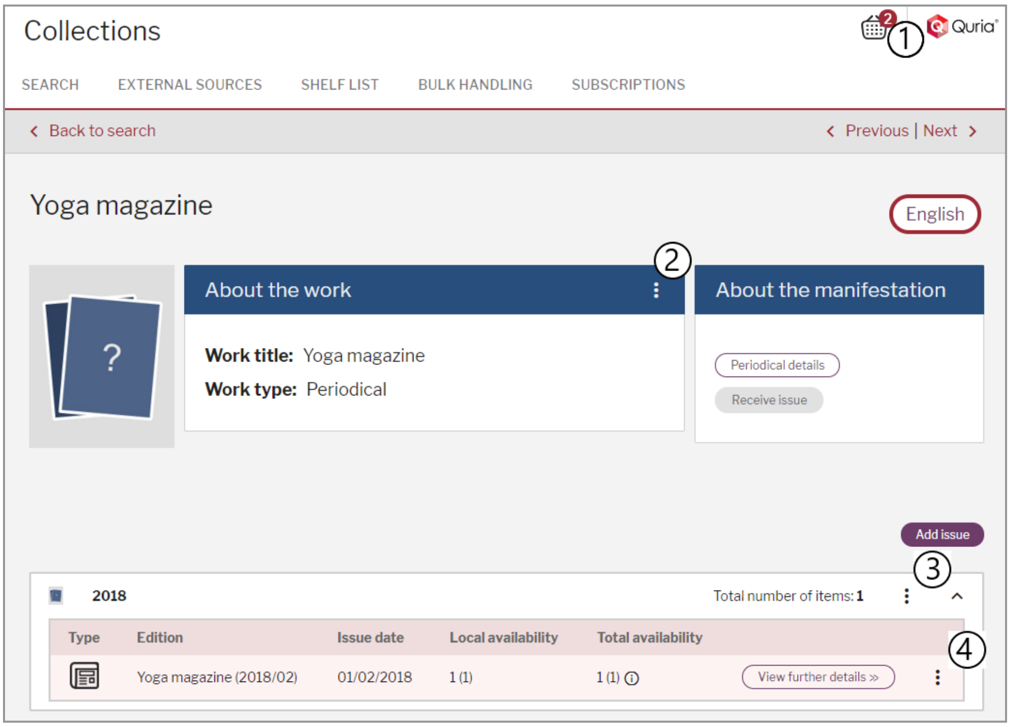
When searching for the title in Collections, there is a number of identical instances of works.



Instead, we had expected something similar to this - a single work with issue numbers neatly organized per year:



Take a moment to get familiar with the location of the collections basket (1), the context menu for the work (2), the context menu for the expression (3) and the context menu for the manifestation.

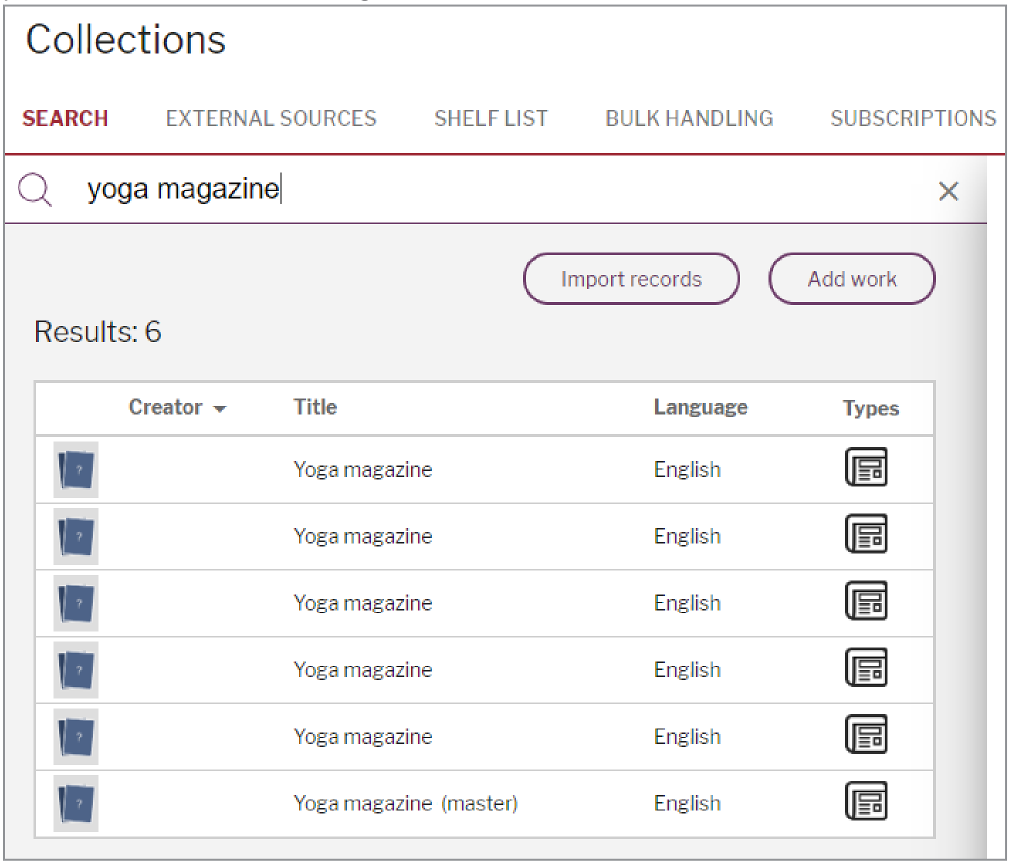


The following procedure describes how to use the collections basket to move an expression (year) with its underlying issue numbers to a work with an existing year with underlying issue numbers.

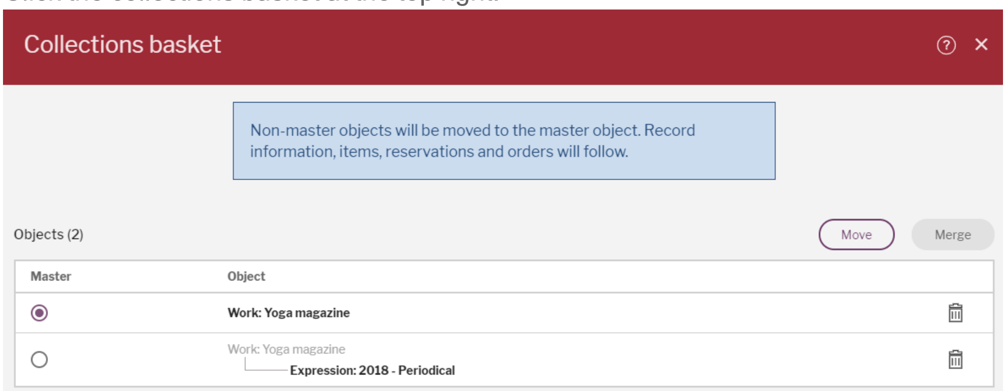
First, select one work that contains the master base expression to which all the issue numbers will be moved. To easier distinguish this master work, we will rename it temporary.

1. Search for the work in Collections.
2. Decide one work that will be your "master" work.

3. Click the context menu for the work, select **Edit expression**, and add for example “(master)” to the title.
   This change will be visible in the search results in Collections. Now, when you search for the periodical, it will look something like this:



4. Open the “master” work, and in the context menu for the work, select **Add to basket**.
5. Go back to the search and locate another periodical work of another year that you want to move to your “master” work. In the context menu for its year, select **Add to basket**.
6. Click the collections basket at the top right.



7. Make sure that the work you selected as master is checked as **Master**.

8. Click **Move**.
   You now have two years with their issues organized under one work.
9. Repeat this for all works that have years that should be moved to the “master” work.
   Similarly, you may have a situation with many several works with the same year that need to be merged with a year in the master work. In this case, instead of moving expressions into a work in the collections basket, you should merge the years with the year from the “master” work as master.
10. When done, select **Edit expression** in the context menu of the “master” work to remove the temporary “(master)” of the title.
11. After merging/moving, there will be “empty” works in the collection that need to be deleted.

Deleting an item

If an item is not on loan or trapped for a reservation, you can delete it. When you are deleting the last item of a title, you can select to delete the corresponding title information as well.

Only items with no transaction status or with the following transaction statuses can be deleted:

- Available
- In transit
- Trapped (cancelled)
- Trapped, in transit (cancelled)
- Internal handling: ILL out cancelled
- Bill paid
- Received

Perform the following steps to delete an item:

1. Locate the title for which you want to delete an item in **Collections**.
2. Click the manifestation row.
3. On the **Items** tab, click the context menu of the item that you want to delete and select **Delete item**.
4. Confirm your action.

Similarly, you can delete an item by scanning its barcode or RFID tag in the circulation window.

You can delete many items at once using the bulk handling functionality.

External sources

Only users with the **Integrations - External sources** permission has access to the **External sources** tab of the Collections page.

You can search for works from selected suppliers from the **External sources** tab of the Collections page.

You can filter on various information about the work and publication to narrow down the search.

From the list of results, you can import a work directly, or edit it and then import, by clicking in the context menu.

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
Norway	Bibbi Bibbi Nynorsk Bibsys Bokbasen Nasjonalbiblioteket
Finland	Melinda
France	Bibliothèque nationale de France
Germany	Deutsche Nationalbibliothek
Sweden	Libris
Switzerland	Helveticat Swiss Library Service Platform
USA	Library of Congress WorldCat

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

The shelf list

You find the **Shelf list** on the Collections page. It is a tool to find current reservations on the shelf in your library.

1. Select where to pick the items in the Department and Section dropdown lists, and the patron's pick-up branch, if you want to narrow the list.
2. Check the **Also show reservations that are available on the pick-up branch** box if you also want to list reservations that are available locally. This might lead to unnecessary transportation if you trap them in your branch.
3. Enter a date- and time period if you want to.
4. Click **Refresh and view list**.
5. Look for the item on the first row in the list in the library.
6. Click the expand icon for that item.
7. If there are more than one copy to pick, define the number you have picked. Click **Items found**. A green check in the row shows that the item was picked.
8. Continue with the rest of the list.
9. When you have picked all the items on the list, return to the desk and check in the items. When the items are checked in, they disappear from the list. If you do not check the items in within 24 hours, the items will turn up as items to pick in the shelf list again.

Titles in demand

The titles in demand feature provides information about the relation between reservations and holdings and gives an indication about demanded titles. This data is generated daily.

1. Go to the **Collections** section in the main menu.
2. Select the **Titles in demand** tab.
3. Search in free text or refine the search by for example selecting a particular creator or language.
4. Limit the search results further by selecting an organisational level, if you want to.

The search results present reserved titles sorted on highest demand in relation to number of items in the selected organisation. Graphics indicate the demand on a 1-5 scale where 5 is most demanded. Note that the total number of items are included in the calculation, except items with status and billed items. Any reservation cooperation is disregarded in the calculation.

When you expand the rows in the search result you find the demand per pick-up branch which sometimes gives a different view or the demand, if there, for example, is no item at all available at a particular branch.

The total number of items/orders may be larger than the sum of items/orders in the expanded information, since the expanded information includes only items at the pick-up branches for the reservations.

Collections basket

You can add several titles that a patron wants to reserve to the collections basket, and then quickly make a reservation for all of the titles.

See also: Reserving several titles

Another purpose of the collections basket is to fix issues related to adding or importing records in Quria. For example, you might get two search hits for the same work.

In these cases, works, expressions and manifestations can be merged or moved, keeping all items and information such as loans and reservations for the underlying items.

You determine which is the master work, expression or manifestation, and then the others will be merged or moved to this.

Only users with the Add/edit/delete works permission have access to this functionality in the collections basket.

Note:
The collections basket is emptied when you sign out from Quria or when you refresh the browser.

Move

You can move:

- One or more expressions to a work, or
- One or more manifestations to an expression

All underlying data will follow the expressions to the work, and all items and orders will follow the moved manifestations.

Merge

You can merge:

- Two or more elements of the same kind (works, expressions or manifestations).

Merging works

In this case, you will add two or more expressions to the collections basket – choosing one as master.

The expressions that you merge into the master will automatically be deleted.

Merging expressions

You move all the underlying manifestations, loans, reservations and items too.

Merging manifestations

When you merge two or more manifestations, you will see the sum of items and orders in the receiving manifestation.

Selecting works, expressions and manifestations to merge or move

The works, expressions and manifestations that you want to work with have to be added to the collections basket.

1. Search for the works, expressions and manifestations that need to be handled in **Collections**.
2. In the context menu, select **Add to basket**. You see that the works, expressions and manifestations that you have added show up in the basket at the top right.
3. When you have selected all the works, expressions and manifestation you want to merge or move, click on the basket to open it.
4. Select the action **Move or merge**.
5. Select which is the master and click **Merge** or **Move**. You can remove any work, expression or manifestation that you don't want to handle before clicking the **Merge**/**Move** button.
6. When the merge or move is completed, the basket is emptied.

The image archive

You can store images such as pictures and photos in the image archive. The images can be connected to catalogue records and also displayed and searched by Arena users. The image archive is an add-on module to Quria.

Adding a new image

Adding an image is similar to adding a regular work.

1. Go to the **Collections** section in the main menu.
2. Click **Add work**.
3. Enter the title of the new work. As you type, matching works in the collection will be displayed, to avoid that you add a duplicate of an existing work by mistake. You can view the details of existing works.
4. If the work you want to add is not already in the collection, click **Add as new work**. Mandatory fields are marked with an asterisk.
5. Select type of work
    - 2D image
6. Select creator type

- Event
- Organisation
- Person

7. Add the name of the creator if you selected **Person**. As you type, matching creators in the collection will be displayed along with the number of existing records by each creator.
8. Select a relator term, for example Photographer or Artist.
9. Fill in subjects and other information you think is relevant.
    - **Subjects**
      As you type, matching subjects in the collection will be displayed along with the number of existing records by each subject. Subjects are necessary if you want to be able to create special collections in Arena.
    - **Description**
      The description is displayed in Arena and should be used for a describing text about the image that you are adding.
10. Click **Add description** and choose a type, preferably **Not specified**.
11. Click **Apply**.
12. Click **Add expression**.
13. For **Language**, select **No linguistic content**.
14. For **RDA content type**, select **Still image**.
15. Click the **Set expression type** button to automatically determine the expression type based on the work type + RDA content type (View it).
16. Add a contributor if more than one person is responsible for the artistic work.
17. Click **Apply**.
18. Click **Add manifestation**.
19. Go to **Publication information** and click **Add**.
20. Under **Year**, you can write a year or a specific date. This is displayed in Arena. No other information is necessary for this entity.
21. Select **Manifestation type**
    - Photograph or Picture
      If there are no physical items connected to the manifestation, the manifestation type must be set to create fictive holdings to be shown in Arena. This is done by checking **Fictive holdings** for the manifestation type under **Configuration**/**Settings**/**Metadata and items**/**Manifestation types**.

      > **Note:**
      > Modifications related to fictive holdings require re-indexing of the public portal. Please contact Axiell for more information.

22. Add **Extent** (for example *1 photograph in a frame*) and **Format** (for example *50 x 50 cm*) if you want to.
23. Add **Accession date**. This date controls what is shown in news lists in Arena. If you want this image to be shown among the news, choose today's date.
24. Go to **Image/document (reference)** and click **Add file**.
25. Choose a file from a source, your local hard drive or a shared file server.
    - Supported file formats: jpeg, png and pdf
    - Maximum file size: 20 MB
26. Add a link text and a public note.
27. Add notes if needed. Modifications related to fictive holdings require re-indexing of the public portal. Please contact Axiell for more information.
28. Click **Apply**.

See also: **Arena online help**

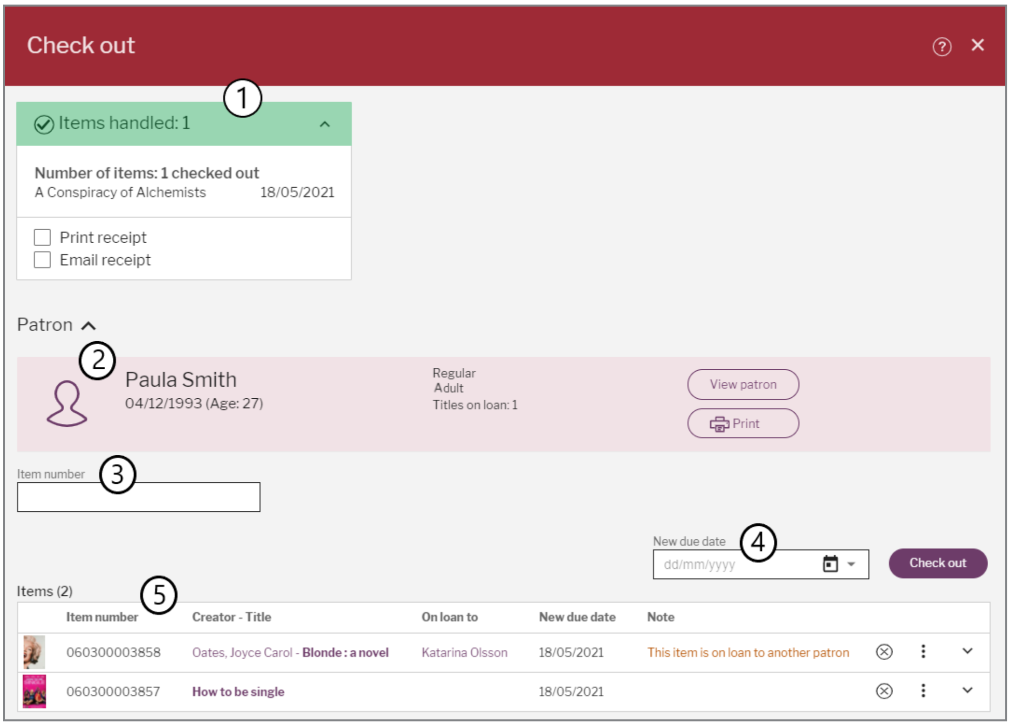
Circulation

One of the key functions of a library is circulation of items - handling loans, returns and renewals of for example books, dvds or ebooks.

Rules define loan periods, checkout permissions, notifications, overdue charges and more.

Checking out items

In the **Check out** window, you start with scanning the patron card or searching for the patron, and then continue by scanning items. Click **Check out** or press **Enter** once to check out the items in the list. All the items in the list will be checked out to the current patron, or renewed if already on loan to this patron. Any items on loan to another patron will be checked in automatically and lent to the current patron.



1	Success feedback	Feedback on successful transactions is shown here. This feedback remains after a new action in the window (new transactions are added to the existing feedback). The information can be expanded or collapsed using the arrow. Receipts can be printed or sent as email. A default setting for receipts can be made per workplace, but you can always select or deselect printing or emailing here. The printing and/or sending of email starts when you close the **Check out** window.
2	Patron	The patron details are displayed in the **Check out** window when you have scanned or found a patron by searching. Clicking **View patron** opens the patron details. Clicking **Print** generates a status receipt of all loans, reservations and debts that the patron has.
3	Search field	This is where you search for an item by scanning or typing the item number.
4	New due	You can set a specific due date for all items if you want to.

	date	
5	Scanned items	Details about the item are displayed, as well as to whom the item is on loan and owning branch. Any alerts for the item are also displayed. Clicking the expand icon displays the item details. Use the context menu to change due date for a single item. Clicking the **x** removes an item from the list. You can navigate to the patron details and to the works by clicking the patron or title directly in the list.

Forcing a checkout

When an item has been trapped for reservation, a dialog will be displayed where you can choose to either only check out items that are not trapped or to override the rule and check it out to someone else (for example if the patron with the reservation has sent someone else to fetch the item).

Temporary items

Some items may be unknown and not part of the collection, for example something temporarily borrowed from another library or kept in the archive, and now, the library wants to handle these items in a smart manner. Using the **Temporary items** functionality may be useful.

When you scan an unknown item in the **Check out** window, the text **Unknown item** is displayed. Select **Add temporary item** in the context menu and fill in the title and creator, and select a manifestation type.

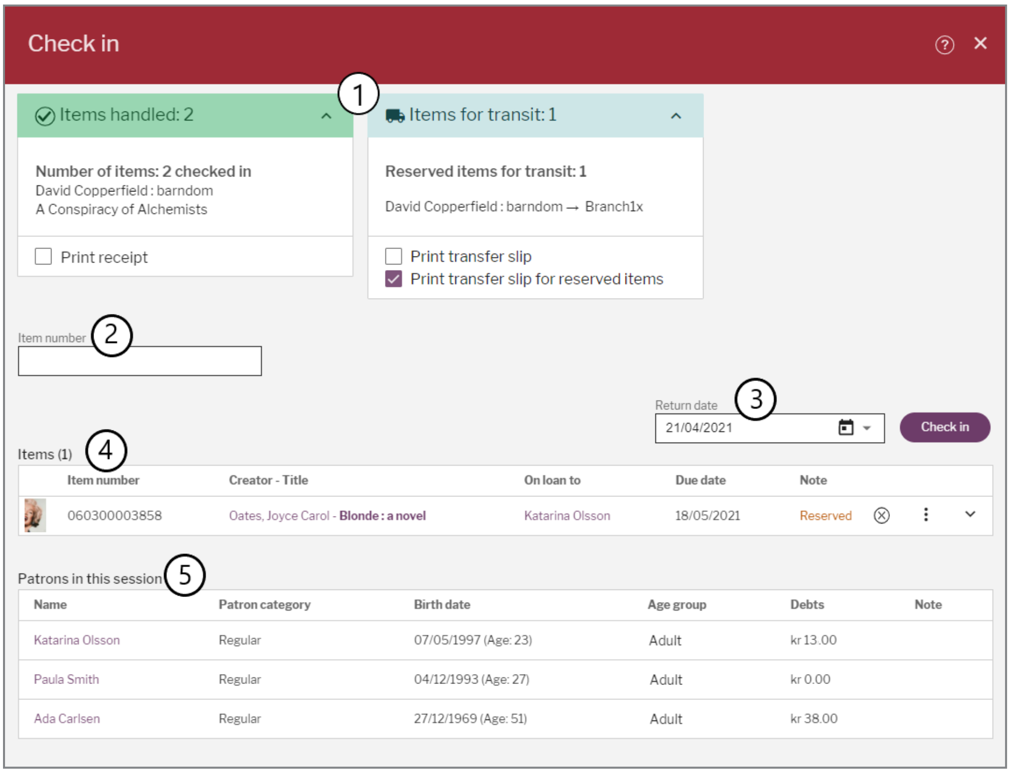
The item can now be checked out and will be displayed under **My loans** in Arena and under patron loans and under overdue reminders in Quria.

When the temporary item is checked in, it has to be registered properly and the temporary item is removed automatically.

> **Note:**
> Temporary items cannot be searched for in the collection or among items.

Checking in items

In the **Check in** window, you scan the item. Click **Check in** or press **Enter** once to check in the items in the list.



1	Success feedback	Feedback on successful transactions is shown here. This feedback remains after a new action in the window (new transactions are added to the existing feedback). The information can be expanded or collapsed using the arrow. Receipts can be printed or sent as email. A default setting for receipts can be made per workplace, but you can always select or deselect printing or emailing here. The printing and/or sending of email starts when you close the **Check in** window. Note: Only one email- or printout receipt is generated per check-in session. If items from several patrons are checked in, no email receipts will be sent, only printout is available.
2	Search field	This is where you search for an item by scanning or typing the item number.
3	Return date	You can set a specific return date for all items if you want to. This can be useful for example if you use a check-in bin and have not emptied it for some time.
4	Scanned items	All the items in the list will be checked in. Any alerts for the item are also displayed. Clicking the expand icon displays the item details. Use the context menu to change return date for a single item. Clicking the **x** removes an item from the list. You can navigate to the patron details and to the works by clicking the patron or title directly in the list.
5	Patron	All unique patrons covered by the current check-in session will be listed separately. This gives you the opportunity to navigate to the patron information also after completing the check-in.

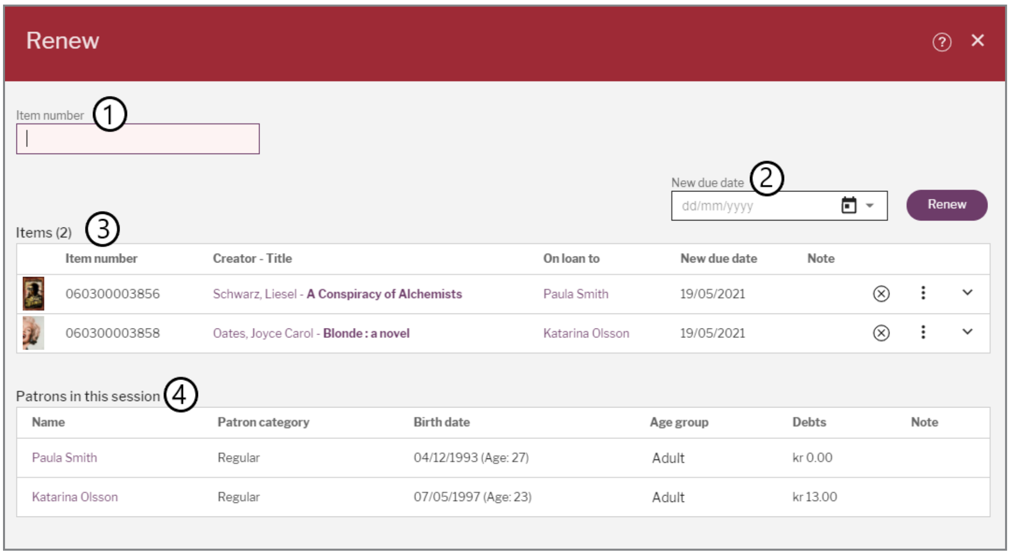
When a temporary item is checked in, you need to register it properly. See also: **Temporary items**

Note:
Outgoing ILL reservations are “checked out” via the **Check in** window. The **Send to library** function is activated when scanning an outgoing ILL in the **Check in** window. This applies to all loans to patrons that belong to a patron category marked as **ILL out libraries**. In these cases, there is no

Note:
reason to search a for patron using for example a library card to make a regular checkout.

Renewing items

In the **Renew** window, you scan the item. Click **Renew** or press **Enter** once to renew all items in the list, even if there are rules that prevent renewal. If there are rules that contradict, a confirmation dialog will be displayed where you are asked if you want to renew all loans. If no rules contradict, all renewals will go through without further handling.



1	Search field	This is where you search for an item by scanning or typing the item number.
2	New due date	You can set a specific due date for all items if you want to.
3	Scanned items	Clicking the **x** removes an item from the list window. Use the context menu to change due date for a single item. You can navigate to the patron details and to the works by clicking the patron or title directly in the list. Clicking the expand icon displays the item details.
4	Patrons	All unique patrons covered by the current renewal session will be listed separately. This gives you the opportunity to navigate to the patron information also after completing the renewals. You can navigate to the patron details by clicking the patron directly in the list.

Feedback on successful transactions is shown after clicking the **Renew** button. The information can be expanded or collapsed using the arrow. Receipts can be printed or sent as email. A default setting for receipts can be made per workplace, but you can always select or deselect printing or emailing here. The printing and/or sending of email starts when you close the **Renew** window.

If you want to renew an item without physical access to it, you can open the **Renew** window from the patron details where all loans for the current patron will be listed. You can carry out the renewal of all titles by pressing **Enter** once. This means that even if no rule prevents the renewal, you will need to press **Enter** to renew for a more controlled process.

Forcing a renewal

If there are items that may not be renewed in the current renewal session, a dialog will be displayed where you can choose to either only renew items without restrictions or to override the rule and renew anyway.

Home service

Home service is a way to allow citizens that cannot visit the library to make use of the library's services. Home service includes storing loan history, warnings for previous loans when checking out items or making reservations and the possibility to search in the patron loan history to help with selecting titles that suit the patron's preferences.

The loan history is kept on title level – not item level. Using Home service is defined via patron categories. The loan history of all patrons that belong to a patron category marked for Home service will be preserved.

> **Note:**
> If you uncheck using a patron category for Home service, all loan history for all patrons assigned to this category will be erased (unless the patron has selected to save their loan history). The same applies if you change a patron's category to a non-Home service category. In both cases you receive a confirmation warning.
>
> Patrons must select to display loan history in Arena in order to see the loan history themselves in Arena, and they will only see loans starting from this point in time - not previous loan history.

Access to patron loan history is defined via the Patron permission **View loan history**.

See also: **Patron categories** and **List of all permissions/roles**

Mobile library

Quria supports mobile units - usually buses or vans that serve as a travelling library for communities without access to a library.

The mobile library requires setup of routes and stops as well as connecting patrons to a stop of a particular route.

Information about routes and stops is available on reservation slips and in reservation notifications to patrons.

Routes and stops can be used as search criteria in patron bulk handling and in reservations bulk handling.

Settings for the mobile library

The mobile library requires setup of routes and stops as well as connecting patrons to a stop of a particular route.

Setting up routes and stops for the mobile library

You can add routes and stops on branch level. Then you add stops for each route.

You can edit and delete stops. Only stops that have no patrons connected to them can be deleted. You can move a stop from one route to another within the same branch.

You can only delete routes that has no stops.

1. Go to the **Configuration** section in the main menu.
2. Under **Organisations**, click **Mobile library**.
   You see existing routes in each branch and you can add new routes.
3. Click a route to see, add or delete stops.

Connecting a patron to a stop

The routes and stops available for a patron depend on the selected pick-up branch.

1. Open the patron details window and select **Patron data**.
2. Under **Route/stop**, select the stop the patron wants to use.

Reservations

Control of reservations is defined using rules. You can define reservation periods, what kinds of items that can be reserved, what patron categories that can make reservations and more.

See also: **Examples - reservation rules**

It is possible to set up reservation cooperation within organisations to for example limit the need for transportation of items.

See also: **Reservation cooperation**

The reservation logic

Quria's reservation logic is based on a dynamic calculation of which item that will be trapped for a patron. The great benefit of this is that the reservation queue is not static, but instead, it can change and adapt automatically to the fluctuation of the stock or changes in the rules for reservations. If an item is added or moved from one branch to another, the queue is automatically shortened. If a branch suddenly needs to close temporarily, it is easy to remove it from the reservation cooperation and the items of this branch will no longer be considered available for reservation.

The moment that the reservation is placed, Quria does not know which of all the items that will be trapped for this specific patron. Since rule settings and the number of items can change during the time between the creation of the reservation and when an item becomes available, the rules for reservation cooperation are checked when an item is returned.

This dynamic queue fits very well into a reality where most of the reservations are handled by the patrons themselves. When patrons make reservations in Arena, they do not have to worry about which item to reserve - they just need to choose a pick-up branch and then Quria handles the rest, based on the rules.

This solution has many benefits, but also some limitations, for example:

- It is not possible to set different fees for reservations based on the ownership of the items or the availability status (on shelf or on loan).
- It is difficult to maintain high performance in the check-out function if too many things need to be checked for every item that is checked out. Because of this, when checking the length of the queue, Quria can currently not consider reservation cooperation when calculating the loan/renewal period for items with reservations. Every reservation in the queue would need to be checked to see if this specific item would be relevant for trapping, and it is further complicated by the fact that the reservation cooperation can consist of many levels. This means that all reservations within an account are counted when the loan/renewal period is calculated.

Working with reservations

You can find details about a reservation, such as when it is valid and where it was made.

1. Scan the patron's library card or search for the patron.
   The patron details window opens.
2. Click **Reservations** and find the reservation.
3. Click the expand icon to find details about the reservation.

Click the title to open the work with all its details.

Finding reservations for a title

1. Search the collection and open the details page for the title.
2. Click the manifestation row.
3. Click **Reservations**.
   All present reservations are listed. The next person in turn is on the top of the list.

Handling many reservations at the same time

On the **Collections** page, under **Reservations**, you can easily search for reservations and modify or cancel several reservations using bulk handling operations. You can also export data for selected reservations to a CSV file, to share with others or work with the data further on your own.

See also: Handling many reservations at the same time

Handling of reserved titles that have been deleted

If the last item of a reserved manifestation is deleted, either using the bulk items functionality, via the context menu for the item or from Scan items, a message is automatically sent to the notification contact defined for reservations. You define the message type **Last item deleted** under **Circulation and notifications**/**Message texts** on the **Configuration** page.

See also: Notification contacts and Message texts

Making a reservation

Reservations are made per title and media type.

1. Search the collection and open the details page for the title.
2. Click **Reserve** for the format of the title you prefer.
   The reservation wizard opens.
3. Enter the patron card number or search for the patron and click **Enter**.
4. In the window that opens next, click **View patron** if necessary (to, for example, update notification method); if not, click **Next**.
5. The default reservation type is **Trap first**, which means that the first available manifestation will be trapped for the reservation. You can also select **Trap all**, to reserve all available manifestations. Note that trapping all will result in additional reservation fees, if the library uses such. If you have been assigned a special permission for Collections , you can check **Override cooperation levels** to trap the title at any branch in the reservation cooperation or **Trap at any branch** to trap the title also at branches outside of the reservation cooperation.

   > **Note:**
   > Regardless of scope, if a reservation control rule does not allow an item to leave the home branch or home authority, then this will still overrule also **Trap at any branch**.

6. If necessary, change pick-up branch and reservation dates, or leave them as suggested.
7. Enter an internal comment about the reservation if you want to.
   The items possible to reserve are listed, and the reservation fees applicable (if any).
8. To reserve a specific edition of a title, uncheck the **Include** box for any manifestation that you want to exclude from the reservation. You can also add manifestations to the reservation that have been excluded by rules settings by checking the **Include** box.
9. Click **Make reservation**.

Reserving several titles

When you want to reserve a number of titles, you can add them to the collections basket and then finish the reservation in one go.

1. Search the collection and open the details page for the title.
2. In the context menu of the manifestation or expression that you want to reserve, select **Add to basket**.
3. Continue to add all the titles that you want to reserve to the same patron.
4. Click the collections basket at the top of the page and make sure that **Reservation** is selected.
5. Remove any titles that you don’t want to reserve and then click **Reserve**.

The reservation wizard opens and you continue by entering patron details and additional information, just as for a single reservation.

Making a reservation of a specific item

Reservations are normally made per title and media type, but you can also reserve a specific item.

1. Search the collection and open the details page for the title.
2. Click the manifestation row for the media type that you want to reserve.
3. In the **Items** section, find the item that you want to reserve and click **Reserve** in the context menu.
   This opens the same reservation window as when making a normal reservation.

Making a reservation for a periodical

Reservations are made per issue when it comes to periodicals.

1. Search the collection and open the details page for the periodical.
2. For the issue that you want to reserve, select **Reserve issue**.
3. Continue with the reservation wizard in the same way as when making a reservation for a book.

Editing or removing a reservation

You can change the valid dates and the pick-up branch for a reservation, and you can remove the reservation.

1. Scan the patron’s library card or search for the patron.
   The patron details window opens.
2. Click **Reservations** and find the reservation.
3. Select **Edit reservation** or **Cancel reservation** in the context menu.

Changing the order of the reservation queue

Sometimes you may want to change the order of the reservation queue when several persons are waiting to borrow a title - a librarian may, for example, want to grant a patron’s reservation higher priority than their own.

1. Open **Collections** and search for the title.
2. Open the item details and select the **Reservations** tab.

3. Select **Change queue number** in the context menu of the reservation that you want to change.

The current queue number is displayed in the window that opens, and you can choose to move the reservation up or down in the queue.

Overriding a reservation rule

It is possible to override the reservation rules when a patron is not allowed to borrow an item or an item is not borrowable.

> **Note:**
> Overriding is not possible if the patron or the card is blocked; then you cannot start the reservation procedure at all.

To reserve an item that is not (yet) reservable in the system, check the **Include** box and then proceed with the reservation.

See also: **Forcing a checkout**

Cancelling an unclaimed reservation

- Fetch the item from the reservation shelf when shelf time has passed and check it in.

The reservation will be automatically deleted and if there are more reservations the first one will get trapped.

Events

In the **Events** section , you can create and administer events that take place in the library, such as author readings, workshops and community events. An overview of upcoming events that take place and end in the coming two weeks in all event locations defined for your account is presented on the Home page. The events that will take place first are displayed at the top of the Home page in Quria.

Event statuses

An event can be in the following statuses:

Status	Description
Draft	The event has been saved as draft.
Planned	The event has been created without a publication date, or the publication date is not yet reached.
Published	The publication date for the event is reached, and the information about this event is available on the library's website.
Completed	The date and time of the event has passed.
Cancelled	The event has been cancelled.

Events in planned or published state are displayed on the Home page in Quria.

Access to the **Events** section in the main menu as well as the possibility to administer events is controlled by role settings. There are two levels of access:

- **Events menu** – you find **Events** in the menu and can view and search for events.
- **Add/edit/delete events** – you can fully handle events.

Creating an event

In addition to single events, you can create recurring events as well as events that last for several days. Events can be open to anyone or require user registration.

The target audiences, locations and rooms that are available for selection when creating an event are added under Configuration/Events.

1. Go to the **Events** section and click **Add event**.
2. Fill in the details for the event. Mandatory fields are marked with an asterisk.
3. The default setting is that patrons register for events. Uncheck **Enable online registration** if the event should be open to anyone without registration.
4. You can determine a maximum number of event participants as well as a maximum of participants that can be signed up in one event registration.
5. Add tags for any terms that should generate additional search hits when someone searches for events in the **Events** section in Quria or on the library's website.
6. Add an image if you want to.

   Note:
   Using images in landscape mode with a minimum width of 700 pixels is recommended. For performance reasons, images in jpg format is preferred.
7. Click **Recurring event** if you want the event to repeat a number of times, for example weekly or monthly. Select if the series of events should end on a particular date or after a set number of occurrences.

8. Select **Multi-day event** (only available for single events) or **All-day event** if appropriate.
9. Add a publication date to let the event be announced to patrons on a particular date. Before the publication date is reached, or if you do not add a publication date, the event remains in status **Planned**.
10. Click **Save**. Alternatively, save the event as draft if you want to adjust the details of the event later.

Notes:
When you create events, the tenant time zone (the time zone of your Quria system) is used. This might be a date and time different from your computer system settings.

Events that end at midnight needs to end at 23:59 or to be created as multi-day events, as the time 00:00 is considered to be the next day.

Multi-day events cannot be configured as recurring. This also means that you cannot create an event that lasts over midnight as recurring.

If a library visitor registers online to the same event with the same email address more than once, the previous registration will be deleted.

Handling events, audiences, locations, rooms and participants

Searching for an event

You can search for an event regardless of its status.

1. Go to the **Events** section and type your search criteria in the search field. You can search for words that are included in the title, location, room, description or tags of events.
2. Check the boxes to filter on event status.
3. Refine the search, if you want to, by expanding the tool located just below the search field.

An asterisk (*) searches for all events.

Adding target audiences for events

You add target audiences for events under **Configuration**/**Settings**/**Events**.

The added target audiences are available for selection when creating an event.

Adding locations and rooms for events

You add locations and rooms for events under **Configuration**/**Settings**/**Events**.

First, you add the locations, and then, rooms for each location.

The added locations and rooms are available for selection when creating an event.

Contacting event participants

You may need to contact the event participants for some reason.

1. Open the event from the Home page or from the **Events** section.
2. Next to participants, click **Copy all email addresses**. The addresses are copied to your clipboard, separated by semicolons.
3. Paste the addresses in the address field of an email and compose the message you want to send.

Tip:
For privacy reasons, it’s good practice to paste the patron addresses in the **Bcc** field in the email. Enter the library’s public address in the **Cc** field.

Copying an event

You can copy an existing event as a basis for another event.

1. Go to the **Events** section and search for the event that you want to copy.
2. Click the context menu for the event and select **Copy event**.

Cancelling or deleting an event

An event can be cancelled or deleted regardless of its status, with some exceptions:

- An event that has been published needs to be cancelled before it can be deleted. A cancelled event will still be possible to search for.
- A completed event cannot be cancelled.

1. Go to the **Events** section and search for the event that you want to cancel or delete.
2. Click the context menu for the event and select **Cancel event** or **Delete event**.

Articles for sale

You can handle selling of for example pens or printouts by clicking **Sell articles** in the main menu or by clicking **Sell articles** under **Debts** for a specific patron.

You can sell articles not only to registered patrons, but to any library visitor.

Access to registering and selling articles is defined via roles – you need to be assigned **Sell articles** under **Sales**.

For further information about selling articles, please see the online help:

help.quria.axiell.com/en_GB/Content/Sales/articles-sale.htm

Selling articles

You initiate sales by clicking **Sell articles** in the main menu or by clicking **Sell articles** under **Debts** for a specific patron. When you sell articles to a registered patron, you can choose to add the amount for the sale to the patron's debts, if you wish.

1. Select an article and number of items in the dropdown menus.
   The total amount is calculated automatically, but you can adjust the amount if needed.
2. Select if you want to print a receipt.
3. Select payment method, and then click **Complete purchase**.

Registering articles to sell

You register articles for sale, for the current account, under **Settings**/**Patrons**/**Articles to sell**. You can register articles to be available for sale immediately, or at a later point.

1. Fill in the details for the articles to sell.
2. Uncheck **Active** to prevent the article to become available for sale right away.

Click an article in the list to edit it. Select **Delete article** to delete it.

Acquisitions

Orders can be created automatically via a supported supplier integration, or manually.

Manual orders can be created provided that the title already exists in Quria.

Access to acquisitions is defined via roles, with different levels of access:

- **Acquisitions menu** – you find **Acquisitions** in the main menu and can work with different aspects of acquisitions.
- **Add/edit/delete requisitions** - access to the **Requisitions** tab and to context menu item **Add requisition** for titles
- **Create order** - access to the **Create order** button on the **Requisitions** tab
- **Edit/cancel order items** - access to menu item **Cancel items** for order items
- **Edit/cancel order lines** - access to context menu item **Cancel order line** for order lines
- **Receive order items** - access to **Mark as received** button for order items
- **Add/edit/delete budget expenses/revenues** – access to **Add expense/revenue** button for budgets and possibility to edit and delete manually added expenses/revenues from budgets.
- **Invoices: Invoices menu** - access to the invoices tab on the **Acquisitions** page and possibility to work with invoices.
- **Invoices: Reopen locked invoices** - access to the context menu item **Reopen invoice**.
- **Invoices: Delete approved/locked invoices** - access to the context menu item **Delete invoice**.

Suppliers are handled under **Configuration**/**Acquisitions and periodicals**.

Budgets

You add budgets including budget periods under **Configuration**/**Acquisitions and periodicals**.

The budgets that have been added are available from the **Budgets** tab on the **Acquisitions** page. This is where you can monitor the current status of the budgets.

You can add ad hoc expenses and revenues to a budget by clicking the budget in the list, and then clicking the **Add expense/revenue** button.

Manual orders

A manual order is based on a requisition and requires that the title exists in Quria.

Requisitions are preparations for orders where colleagues can enter what they wish to order. On the **Requisitions** tab of the **Acquisitions** page, you get the full picture of what is requested around the organisation, and it is possible to modify and cancel the requisitions before orders are created.

A manual order can be sent by email or printed to be sent by post.

Adding a requisition

1. Go to **Collections** in the main menu and search for the title to order.
2. Open the title details page.
3. In the context menu for the manifestation to order, select **Add requisition**.

4. Select supplier in the dropdown menu and add order method and unit price. You can also specify other details such as VAT rate. You can add a location now, or before placing the order.
5. Click **Save**.

Creating an order

1. Go to **Acquisitions** in the main menu. On the **Requisitions** tab you can search and filter for requisitions, and click on any requisition that you want to check before you create the order. Requisitions can be modified or cancelled before any orders are created. You can search for requisitions similar to orders search
2. Select one or several requisitions in the list and click **Create order**.

You now find the orders on the **Orders** tab, in status **Ordered**. If email was selected as order method, an email is sent to the supplier. If print-out was selected as order method, you find the orders to print and send by post on the **Print orders** tab.

One or several orders will be created based on supplier, customer numbers and delivery/invoice addresses included in the selected requisitions.

Templates

If you usually handle orders for a particular type, location of budget, you may find it useful to create order templates. You find your personal templates on the **Templates** tab of the **Acquisitions** page.

Searching for an order

1. Go the **Acquisitions** section in the main menu and select the **Orders** tab.
2. Type your search criteria in the search field. You can search for:
   - Order number (exact value - not fuzzy)
   - Supplier (fuzzy)
   - Title (fuzzy)
   - Creator (fuzzy)
   - Issuer (fuzzy)
   - ISBN (exact value - not fuzzy)
   - Year (publication year of the title, exact value)
3. Check the boxes to filter on order status.
4. Refine the search, if you want to, by expanding the tool located just below the search field, and specify order information and/or title details.

An asterisk, *, searches for all orders.

Advanced search

You can also search using operators or prefixes to get more precise hits.

Operators: Construct search strings using boolean operators AND, OR, NOT (capital letters).

Prefixes: Use the prefixes below followed by a colon and the search criteria. You can use the long or the short prefix name.

Short	Long	Searches in
cla	classification	Classification of the title
cre	creator	Creator name
lan	language	The language of the title
num	number	Covers for example ISBN, ISSN, EAN
she	shelfmark	Shelf mark
tit	title	Title information in the manifestation and expression that the order is placed for
year	year	The publication year

Click the title to open the work with all its details.

Cancelling an order or part of an order

When you cancel an order, already delivered items will not be affected.

1. Go the **Acquisitions** section in the main menu, select the **Orders** tab and search for the order.
2. You can select **Cancel order line** from the context menu of the order.
3. You can also click the row with the order to open the order details, and then select to cancel individual order items.
4. Add a comment, and confirm your action.

A cancelled order will get the status Cancelled. Hover over the word **Cancelled** to show when the order was cancelled and by whom.

Setting the location for a new item and making it available

You can make the items included in an open order available prior to delivery. These will then be visible on the library website with status **On order**, and patrons can make reservations.

1. Go the **Acquisitions** section in the main menu, select the **Orders** tab and search for the order.
2. Click the row with the order to open the order details.
3. Select one or several items.
4. Click **Set location and type**.
5. Select location in the dropdown menus and click **Save**. When the item has a location (branch as a minimum), it is available in Arena, for reservations etc.

To decrease the amount of work to set location data, the system will remember the last used values and set those as long as only no values are already set or you check more than one item.

Printing labels for items on order

1. Go the **Acquisitions** section in the main menu, select the **Orders** tab and search for the order.
2. Click the row with the order to open the order details.
3. Select one or several items.
4. Under **More actions**, click **Print bibliographic label** or **Print spine label**.

Generating barcodes and programming RFID tags for items on order

You can generate barcodes and program RFID tags for items on order, before the items are available.

1. Go the **Acquisitions** section in the main menu, select the **Orders** tab and search for the order.
2. Click the row with the order to open the order details.
3. Select one or several items.
4. Click **Generate barcodes**.
5. Choose if you want to use a sequence of barcodes based on preprinted labels or if you want to get automatically created barcodes. The sequence based on preprinted labels can be very useful, for example if you have ordered many copies of a title. Then you don’t have to scan them individually.
6. Click **Program RFID tags**.
7. Place the item on the RFID scanner. If you checked more than one item, the system will count down and show the number of items programmed.

Receiving items

You can make items available on the shelf and ready for circulation in these two different ways.

Checking in

1. Open the **Check in** window and scan the barcode.
2. Click **Check in**.

The item is ready for circulation.

Marking as received in Acquisitions

You can mark items as received, for example if they need some more work before it is time for circulation. After that, the items have to be checked in to become available for patrons.

1. Go the **Acquisitions** section in the main menu, select the **Orders** tab and search for the order.

2. Click the row with the order to open the order details.

3. Select the items to receive and click **Mark as received** (only possible for items with location information).

Invoices

Invoices can be added to Quria automatically, provided that you have an integration to a supplier that offers this service, or manually. You can work with invoices from the **Invoices** tab on the **Acquisitions** page. This is where you add invoices manually, connect items to invoices and approve and lock invoices.

Adding an invoice manually

Suppliers are defined under **Configuration**/**Acquisitions and periodicals**/**Suppliers**.

1. Click **Add invoice** at the top right of the **Invoices** tab.
2. Fill in the information about the invoice.

Searching for invoices

You use the search field on the Invoices tab to search for existing invoices using the supplier name or the invoice number. You can refine the search by expanding the tool located just below the search field, and select an invoice status, an organisational level and a period for the invoice. Left and right truncation (*) can also be used.

When you click an invoice in the search results, the invoice details are displayed. You can edit the details by clicking the pen.

You can delete invoices and reopen locked invoices using the context menu for each invoice.

Handling invoices

When you have searched for and selected an invoice, you can approve or lock the invoice using the buttons at the top right. You can also include additional amounts on the invoice, for example shipping fees. The added amounts are useful for budget follow-up.

The difference between approving and locking an invoice, is that if you set the invoice to approved you signal that you have the approved the invoice for payment but you can continue working with it. If you lock the invoice, you can no longer make changes unless you first unlock it.

Connecting items to an invoice

You can connect existing items in the collection to an invoice.

1. Search for the invoice on the **Invoices** tab of the **Acquisitions** page.
2. Click the invoice to display the invoice details.
3. Search for items to connect at the bottom of the dialog. The supplier of the invoice is selected by default but you can also search for items without a supplier.
4. Refine the search further if needed, for example by entering information about the title or the period items were received or created.
5. Check the box for the items that you want to connect to the invoice and click **Connect items to invoice**.

The invoice number will now be part of the item details. Even if you remove items, the item information for the connected items in the invoices will remain for audit reasons.

Year end processes

At the end of the year, you can perform year end processes for acquisitions and periodicals.

For acquisitions, you can transfer any unfinished requisitions and orders from the current year to the next.

If budget periods for the new year do not exist, they will be created automatically with the same amounts as the current year. Modification of amounts must be handled manually.

For periodicals, you can create publication plans for the coming year. When you run the year end process for periodicals, publication plans will be generated with the same patterns as the current year. You may need to adapt the plans manually if there are changes to the release patterns for specific periodicals.

You find the year end process tools under **Configuration**/**Admin**/**Year end tasks**.

ILL

Loans to and from other libraries are managed using ILL (Interlibrary loan). There are different workflows for items that come in to your own library on loan from other libraries (ILL in), and for items that leave your library as they are requested from other libraries (ILL out).

In the ILL section, you can search and monitor status of items under ILL in and ILL out. Under ILL in, you also register arrival of items and make manual ILL in requests. Under ILL suppliers, you can search for associated libraries and register ILL suppliers manually. You find the complete ILL details by clicking an item under ILL in or ILL out and expanding its details.

The workflow for ILL can be more or less automated, depending on if your library is connected to a national ILL service (such as Libris in Sweden or Bibliotekssøk in Norway) or if the ILLs at your library are handled completely manually.

Working with ILL in items

Searching for ILL records

You use the **Search** field under **ILL In** on the **ILL** page to search for and act upon incoming ILL records.

1. Go to the **ILL** section in the main menu.
2. Search for e.g. a library number, creator or title in the search field and press **Enter**.
3. Narrow down the search results using the status boxes or the search facets to the right. You can also filter on pick-up organisation using the dropdown menu.
4. Refine the search further, if you want to, by expanding the tool located just below the search field, and specify ILL information and/or title details.
5. Click the expand button for a record in the list to see all the details for that record, or use the context menu to perform possible actions for the selected record.

Placing a manual ILL in reservation

1. Select **ILL in** in the ILL section and click **Add manual ILL in**.
2. Fill in the data. Mandatory fields are marked with an asterisk.
    - ILL supplier: The name of the library that should send the item.
    - Reference number: not currently used.
    - Pick-up branch: Where the patron should pick up the item
    - Reservation valid to: The expiry date for the reservation
    - Fee: The fee that the patron will be charged when the item is received at your library.
    - Patron: As you start to write, all patrons matching are listed.
    - Title: The title of the item.
    - Creator: Name of the creator of the item.
    - Manifestation type: Select manifestation type in the dropdown list.
    - Language: The language of the item.
3. Click **Save**.

Now, the reservation is listed under the patron’s reservations.

National services

Orders from Libris fjärrlån (Swedish customers)

If you use Libris fjärrlån, you make the order in Libris, and do not need to add it manually in Quria.

The orders can be imported automatically using the scheduled job **Import incoming ILL**.

You can fetch an order right away by clicking the **Fetch Libris ILL** button. You can do this even if you have a job scheduled

Orders from Biblioteksøk (Norwegian customers)

ILL requests made by patrons via Biblioteksøk are imported automatically to Quria. When the supplying library sends the ILL, its status is updated and an item number is supplied. The easiest way to register arrival of this kind of ILL is to click the **Register arrival** button under the **ILL In** tab and then scan the item. Then you follow the steps under Registering the arrival of an ILL in item.

An ILL made via Biblioteksøk may also have been updated with other statuses such as Rejected or Request failed. You can use the facets to find orders with different statuses.

Registering the arrival of an ILL in item

1. Select **ILL in** in the ILL section and search for, for example, library name, creator or title in the search field and select **Register arrival** in the context menu.
2. Fill in the data.
    - Temporary item number: The barcode for the process at your library.
    - Receive copy: Check this box when you receive a copy. No return date can be entered.
    - Date to be returned to owning library: Change to an earlier date if you want a margin for return from patron.
3. Click **Save**.

Check in the item, at the same time, a reservation notice will be sent to the patron.

Handling of ILL copies

If the ILL in item is a copy, it will be stated on the reservation notice.

Once the patron picks up the item, there is no further handling required. When the reservation expires, the ILL will automatically get status Completed.

Checking in and returning ILL ins

1. Open the **Check in** dialog and scan the item.
2. Depending on the procedures followed by your library, select either **Return ILL** or **Check in:**
    - **Return ILL** means that the loan is completed and sent back to the supplying library right away.
    - **Check in** means that the loan is completed for the patron and is handed over to the person responsible for ILLs. It is good practise to print a receipt for internal handling. The person responsible for ILLs will then search for the item on the **ILL** page, and selects **Return ILL** in the context menu.

Cancelling an ILL in reservation

You can cancel an ILL in reservation in the ILL in list or from the patron's reservations list. The patron can cancel from Arena.

ILL in list

1. Select **ILL in** in the ILL section and search for the item.
2. Select **Cancel ILL in** in the context menu.
3. Inform the external library that the reservation has been cancelled.

Patron's reservations

1. Go to the **Patron** section and search for the patron.
2. Find the ILL reservation in the **Reservations** top menu.
3. Select **Cancel reservation** in the context menu.
4. Inform the external library that the reservation has been cancelled.

ILL in status

The status of items changes according to where they are in the ILL workflow.

Status	Description
Requested	Your library has made an automatic or manual request to another library.
Received	The item has arrived to your library and has been registered with a date to be returned to owning library.
In transit	The item is checked in and set In transit since the pick-up branch deviates from the current branch.
On reser-vation shelf	The item is checked in and a reservation notice is sent to the patron.
Checked out	The patron has checked out the item.
Renewed	The item has been renewed.
Internal hand-ling	The patron has returned/checked in the item.
Bill handling	The item is on a bill and the bill has been settled/closed.
Loan closed	The item was on loan to a patron but the loan is closed.
Completed	When the staff has clicked **Return to library**, a transportation slip is printed and the item is returned to the other library.
Cancelled	Your library has cancelled the request automatically or manually.

Extending the due date of an ILL in reservation

In some cases you may need to extend the due date of an ILL in reservation. First, make sure that the owning library agrees with extending the due date.

1. Select **ILL in** in the ILL section and search for the item.
2. Select **Edit** in the context menu of the item.
3. Update the due date.
4. Click **Save**.

If the item is already on loan, you need to find the loan in the patron details and select **Renew** for the new due date to be applied.

If the item is not yet on loan, the new due date is applied.

Working with ILL out items

Searching for ILL records

You use the **Search** field under **ILL Out** on the **ILL** page to search for and act upon outgoing ILL records.

1. Go to the **ILL** section in the main menu and select the **ILL Out** tab.
2. Search for e.g. a library number, creator or title in the search field and press **Enter**.
3. Narrow down the search results using the status boxes or the search facets to the right.
4. Click the expand button for a record in the list to see all the details for that record, or use the context menu to perform possible actions for the selected record.

Placing a manual ILL out reservation

- Make a reservation for the ILL out patron, in the same way as an ordinary reservation.
- Alternatively, the external library has placed a reservation via your public collection.

After the reservation is made, it appears in the ILL out list and in the patron's (library's) reservations.

See also: **Making a reservation**

Sending an ILL out item

Note:
In order to print a transportation slip, **Library number** must be entered for the receiving library under **ILL**/**ILL libraries**. The same number must be entered as **Card number** for the receiving library under **Patron data**/**Patron's own cards**.

1. Find the item (pick it from the shelf or wait for it to be on the regular shelf list and gets trapped).
2. Scan the item in the **Check in** window. It automatically gets the patron/library who has placed the ILL out reservation.
3. Click **Check in** if the item should pass on to internal handling at your library, before shipping (this step can be left out). The item gets status Internal handling.
4. Click **Send to library** and print the transport slip. The item gets status Checked out.
5. Send the item.

Checking in an ILL out item

When the item comes back, just check it in as a normal loan. The item gets status Completed.

Editing or cancelling an ILL out reservation

1. Select **ILL out** in the ILL section and search for the reservation, or search for the reservation in Collections, using the title.
2. Select **Edit reservation** or **Cancel reservation** in the context menu. The options available depend on the status of the item.

ILL out status

The status of items changes according to where they are in the ILL workflow.

Status	Description
Created	Another library has created a reservation of an item in your library, or you have created an ILL out reservation manually.

Status	Description
Trapped	If you want to use an internal handling before sending the item off to the other library. This status is not shown in the ILL out list, but in the ILL details.
Internal handling	When you check in the item to have a delay before sending the item off to the other library.
Checked out	The item has been sent to the other library.
Renewed	The item has been renewed to the other library.
Completed	The item has been returned to your library and checked in.
Cancelled	Automatic: The requesting library has cancelled the reservation in your library. Manual: Your library has removed the reservation from the requesting library.

ILL suppliers

It is possible to add ILL suppliers to Quria via subscription from a national library service if NCIP is used. You find all associated libraries by searching under ILL suppliers in the ILL section.

It is also possible to make a **Data extraction** in Libris Biblioteksdatabasen to fetch all ILL suppliers (Swedish customers). These are displayed under ILL suppliers.

Note:
Connection to ILL suppliers via NCIP is currently available in Norway only.

Adding an ILL supplier manually

If the library that you want to exchange books with for some reason is not already listed as an ILL supplier, you can add an ILL supplier manually.

Prerequisites for an ILL supplier

When another library wants to borrow an item from your library (ILL out), this other library must be registered in Quria both as a patron and as a supplier.

Note:
In order to print a transportation slip, **Library number** must be entered for the receiving library under **ILL/ILL libraries**. The same number must be entered as **Card number** for the receiving library under **Patron data/Patron's own cards**.

Adding a patron

Add the other library as a patron. Make sure that the patron category that has **Category for patrons (libraries) used for ILL out** (and for Norwegian installations also: **Default category for automatically created ILL out patrons (libraries)**) ticked is used. You find the patron categories in Configuration/Settings/Patrons/Patron categories.

Adding a supplier

Click **Add supplier** under ILL suppliers in the ILL section and fill in the data.

See also: Adding a patron and Patrons configuration

Depot handling

Depots is a way for libraries to borrow a set of items from an external supplier for a longer time, not aimed at a specific patron.

Note:
Automatic depot handling via NCIP must be enabled via Axiell support and is currently available in Norway only.

Once the depot items are registered in Quria, they will be available for the patrons as any other library items. In most aspects, handling of depot items is similar to regular items, but with a few exceptions:

- Depot items cannot be assigned a temporary location.
- Depot items are not found on the Items tab of the Collections page.
- Home location for a depot item can only be changed within the current account.
- Depot supplier cannot be changed for NCIP depots.
- Depot items cannot be deleted manually in the manifestation details. This will be handled automatically when the depot is returned or cancelled.

Depots are handled on the **Depots** tab of the **ILL** page. Only users with the **ILL**/**Depot handling** permission has access to the depot functionality.

You can create analytic reports based on depot statuses.

See also: **External depots: Stop trapping reservations (number of days prior to external depot expiry date)**

Creating depot items

Depot items can be created manually or automatically based on NCIP messages.

Creating depot items manually

If there isn’t already a work with expressions and manifestations for the depot items, you need to add this. See also: **Adding works**

1. Add an item in the regular way, but select **Depot** and also enter the ILL supplier and expiry date. See also: **Adding an item**

The depot item now gets status **Received** automatically.

Searching for depot items

You use the **Search** field on the **Depots** tab of the **ILL** page to search for and act upon depot items.

1. Go to the **ILL** section in the main menu and select the **Depots** tab.
2. Search for a title or a depot supplier in the search field and press **Enter**. You can filter the search hits based on depot status by checking the status boxes.
3. You can refine the search by expanding the tool located just below the search field. You can make selections based on depot dates, depot supplier, organisation and different statuses. The **Automatic status** and **Manually set status** fields refer to individual items and the **Depot status** field refers to the depot information for the items. You can also make selections based on title information.

Scanning items

You can select the **Scan items** option to scan one or several items, get them in your list and then handle them at the same way as when you search and filter for items.

Changing data for many depot items at the same time

You can change data related to home location, return depot items or mark them as received.

Note:
When you select several depot items in the list, actions that may not be applicable for each selec-

Note:
ted item will become available. But when an action is carried out, only items that are valid for the particular action will be affected.

Under **Change data**/**Change home location**, you can bulk change the following settings:

- Organisation
- Department
- Section
- Item type
- Shelf - item
- Item receipt type

For each field you can change value, leave as is and in some cases clear current value (department, section, item type and item receipt type). If you change organisation, the default choice for department/section will be **Clear value**. New values must be selected if wanted.

1. Select which settings you want to change and click **Change**.
2. Confirm your action.

You can also change the depot expiry date by selecting **Change data**/**Change expiry date**.

Exporting depot items to a CSV file

1. After having selected the items that you want to export, click **Download as CSV**.

A CSV file is created in your **Downloads** folder.

Receiving depot items

Only depot items with status **Ordered** can be received. Depot items ordered via NCIP can also be received using the **Check in** window. After receiving depot items, they become available to patrons. Manually created depots are set to **Received** automatically when created.

Receiving items by scanning

1. Open the **Check in** window.
2. Scan the barcodes of the items to receive.

Receiving items by searching

1. Search for depot items on the **Depots** tab of the **ILL** page.
2. Select the items to receive and click **More actions**/**Receive**.

Deleting many depot items at the same time

Depot items with status **Cancelled** or **Completed** can be deleted. No analytics will be created for deleted depot items.

1. After having selected the depot items you want to handle, click **More actions**/**Delete**.
2. Confirm your action.

Analytics

You use analytics to view and create reports about many different aspects of library usage. The reports can be customised, and you can also download reports. You find all reports when you click **Analytics** in the main menu.

You can filter the list of existing reports based on report type, data source and private/public reports using the dropdown menus.

Access to analytics is defined via roles, and there are two levels of access:

- **Analytics menu** – you find **Analytics** in the menu and can view reports. You can also modify reports for your own purposes, without saving.
- **Create/edit/duplicate/delete reports** – you can fully handle reports.

Creating a report

Perform the following steps to create a report:

1. Click **Analytics** in the main menu to open the Analytics window.
2. Click **Create report** at the top right.
   The **Analytics report** window opens. Mandatory fields are marked with an asterisk.
3. Select report type:
   Units count – to create a report based on numbers of items, manifestations or patrons
   Monetary count – to create a report based on anything related to financials such as orders or debts
   Occasions count – to create a report based on happenings such as circulation, notifications and orders
4. Give the report a name, and, if you wish, a description.
5. If you want to create a private report, that can only be seen by yourself, then check the box for this purpose.
6. Select start date and end date of the data to be included in the report. Since units count reports aren't based on a period of time but on a certain point in time, only one date is selected.
7. Select which intervals will be used to group the data.
8. If you want to, select organisational level. After that, you can also group the data in the report by the next organisational level. For monetary and occasion counts, the organisation/workplace is, in the vast majority of cases, the organisation/workplace where the transactions took place, for example where a loan was checked in or an item was created. There are some exceptions for analytics created by scheduled jobs. For example, for a debt caused by an overdue reminder, the owner would be the branch where the overdue item was checked out. For some data sources it is also possible to group and filter on ownership of items and debts by adding sublevels.
9. Select which data sources to fetch the report data from. The available data sources depend on which report type you have selected. You find an overview of the data sources below.

10. Define how to filter and group the data for the report further, based on the data sources you have selected. When you select data groups, you can often select to filter on values that you want to include in the report, for example one or some item types, manifestation types or patron categories. You find an overview of the sub-levels below.

Note:
Not all selections make sense to combine when creating a report:
Organisations have no relation to manifestations.
Organisation levels lower than accounts have no relation to patrons.

You have now made all the necessary settings for the report.

To see what the report looks like, click **View result**. Make any modifications you want, and then click **Save** to make the report available from the Analytics window.

You can also download the report as PDF or in CSV format, to share with others or work with the data further on your own, by clicking **Download as PDF** or **Download as CSV**.

Note:
Some web browsers may not fully support saving as PDF. In that case, you can usually find a browser add-on on the Internet.

Data sources for analytics

Report type	Data source	Occasion	Usage
Occasions	Circulation	Check-in Checkout Renewal	Creates analytics related to circulation. You can select to include some or all of the circulation events in the report.
	Depots	Cancelled Completed Received Requested	Creates analytics related to depot items.
	Interlibrary loans	Cancelled Received Requested	Creates analytics related to interlibrary loans. You can select to include some or all of the ILL events in the report.
	Item location change	Location changed	Creates analytics for items whose location has been changed.
	Items	Added Deleted	Creates analytics of items that have been added or deleted to the collection. You can select to include added items, deleted items or both in the report.
	Manifestations	Added Deleted	Creates analytics of manifestations that have been added or deleted to the collection. You can select to include added manifestations, deleted manifestations or both in the report.
	Notifications	Sent	Creates analytics for sent notifications.
	Patrons	Created Deleted	Creates analytics of patrons that have been created or deleted. You can select to include created patrons, deleted patrons or both in the report.
	Patrons, active	Active	Creates analytics for active patrons.
	Remote check-in	Check-in from remote branch Check-in to remote branch	Creates analytics related to interlibrary loans that have been checked in at a remote branch. You can select to include items that have been checked in from a remote branch, to a remote branch or both in the report.

Report type	Data source	Occasion	Usage
	Reservations	Cancelled Completed Created Trapped	Creates analytics related to reservations. You can select to include some or all of the reservation events in the report.
Monetary	Debts	∑ created ∑ paid ∑ removed	Creates analytics related to debts. You can select to include debts of some or all debt statuses in the report.
	Orders	∑ cancelled ∑ created ∑ received	Creates analytics related to orders. You can select to include orders of some or all order statuses in the report.
Units	Items	-	Creates analytics of the number of items in the collection at a specific date.
	Manifestations	-	Creates analytics of the number of manifestations in the collection at a specific date.
	Patrons	-	Creates analytics of the number of patrons at a specific date.

Sub-levels available for analytics

Sub-level	Usage
Expression language Expression type Manifestation literary form Manifestation shelf Manifestation target audience Manifestation type RDA carrier type RDA content type RDA media type	Analytics that include title information
Patron age Patron age group Patron category Patron country Patron gender code Patron postcode Custom fields	Analytics that include patron information, including analytics for notifications
Send method Notification type	Analytics for notifications
Item account Item authority Item branch Item department Item receipt type Item section Item shelf Item supplier Item type	Analytics that include items

Sub-level	Usage
Former location	Analytics for items with changed location
New location	
Relocation type	
Debt type	Analytics for debts
Removal type	
Owning branch	
Payment method	
Supplier	Analytics for orders
Remote branch name	Analytics for interlibrary loans that have been checked in at a remote branch

Opening a CSV file in Microsoft Excel

If you want to open the CSV file in Microsoft Excel, nicely formatted and with support for special characters etc, perform the following steps:

1. Start Microsoft Excel and open a new blank workbook.
2. Under the **Data** tab, select **From Text/CSV**.
3. Browse to the location of the CSV file, select it and click **Import**.
4. Keep the default settings in the preview and select **Load**.

The report opens in Microsoft Excel.

Report examples

You can create reports in a number of ways for very many different reasons. You find a few examples below.

Creating a report based on patron activity

Most of the settings you make to create reports are rather straight-forward, but the patron activity report may need an introduction.

When you have selected **Occasions count** as the report type, you can for example create reports based on patron activity. Either of the following operations is considered patron activity:

- Signing in
- Checking out
- Checking in
- Renewals
- Reservations

Each patron that performs any of these activities is included in the **Patrons, active** data source.

You can filter the data in the report further, by selecting a level in the organisation, and group the results based on time intervals and patron age, category, gender and postcode.

Creating a report to monitor payments and bills

You can easily create a report that gives you a nice overview of created, removed and paid debts.

1. Select **Monetary count** for Report type and give your report a name.
2. Select start date and end date of the data to be included in the report.
3. Keep the grouping for **Whole period**.

4. If you want to, select a level in the organisation.
5. Select **Debts** for Data sources and keep the setting for Occasions.
6. Select **Debt type** for First level data group and **Payment method** for Second level data group.
7. Click **View result**.

You will be able to see if bills and administration fees have been paid in the library or at an external unit.

See also: **Billing of lost items**

Creating a report based on the name of the manifestation or item shelf

For manifestation shelf and item shelf, you can limit your report to shelves that begin with a number of characters that you define.

When you select the data sources **Manifestations** or **Items**, and **Manifestation shelf** or **Item shelf** as the first level data group, you can enter the first characters of the shelf to easily create a report for all shelves that starts with the same characters.

Using age groups for reports

It can be useful to create reports that include age groups instead of patron age.

The analytics age groups are specific for analytics and has nothing to do with the patron age groups that are defined in Configuration and used in rules.

Creating age groups for analytics

To create age groups for analytics purposes only:

1. In the **Analytics** section, select the **Settings** tab.
2. Click **Age groups** and **Add group**.
3. Add groups that you want to group your data by - you just add a start age - the end age will be according the start age of the next age group.

Creating a report that includes age groups

- Once you have created age groups for analytics, you can, for example, create an occasions report using the **Circulation** data source, and **Checkout** as occasion. Then add **Patron age group** as the first level data group.

You can now generate a report where you see the number of checkouts for each age group.

Top lists

You can create top lists reports based on the most borrowed or most reserved titles, in order to share with patrons and library web users. The top lists are dynamic and will always be up-to-date.

Creating a top list

Perform the following steps to create a top list:

1. Click **Analytics** in the main menu to open the Analytics window.
2. Select the **Top lists** tab.
3. Click **Create top list** at the top right.
   The **Top list report** window opens. Mandatory fields are marked with an asterisk.

4. Give the top list a name, and, if you wish, a description.
5. If you want to create a private top list, that can only be seen by yourself, then check the box for this purpose.
6. Select the number of days to fetch loans or reservations from, and the number of hits to include in the top list. Also select a level in the organisation.
7. Select data source - **Checkouts** or **Reservations**.
8. Define how to filter the data for the top list further. When you select filter, you can often select to filter on values that you want to include in the top list, for example one or some expression languages, manifestation types or item shelves.

To see what the top list looks like, click **View result**. Make any modifications you want, and then click **Save** to make the top list available from the Analytics window.

You can also download the top list as PDF or in CSV format, to share with others or work with the data further on your own, by clicking **Download as PDF** or **Download as CSV**.

> **Note:**
> Some web browsers may not fully support saving as PDF. In that case, you can usually find a browser add-on on the Internet.

The top list ID is used to display top lists on the library web site (Arena only).

Managing top lists

In the list of existing top lists, you can delete or duplicate a top list from its context menu. You can also copy the top list ID to the clipboard.

Configuration

This section describes the configuration of Quria.

The configuration reflects your library organisation. Rules determine many aspects of the Quria system including patron permissions.

You can set up roles and permissions for staff, item types and statuses, message texts for notifications, scheduled jobs and much more.

Many of these settings are set up at the initial installation, but may need to be updated for different reasons.

Administrating roles

Users with access to the Configuration section can handle roles.

Adding, editing and deleting roles

1. Go to the **Configuration** section in the main menu.
2. Click **Roles** in the top menu.

Adding a role

1. Click **Add role**.
2. Add a name and a description.
3. Select the permissions to include in the role.
4. Click **Save**.

Editing a role

1. Click on a row to open the role details.
2. Edit the data.
3. Click **Save**.

Deleting a role

Click on a row to open the role details.

Click **Delete role**.

Assigning a role to a user

You can combine roles so that a user has many roles; different roles depending on location (where they sign in).

List of all permissions/roles

The permissions possible to define to different roles in Quria are listed below.

Permission	Description
Acquisitions	Access to menu item **Acquisitions**.
	Permission to edit and delete manually added expenses/revenues from budgets
	Access to menu item **Invoices**
	Permission to reopen locked invoices
	Permission to delete approved/locked invoices

Permission	Description
	Access to the **Requisitions** tab on the Acquisitions page and to context menu item **Add requisition** for titles
	Access to the **Create order** button on the **Requisitions** tab on the Acquisitions page
	Permission to edit and cancel order items
	Permission to edit and cancel order lines
	Permission to mark order items as received
Analytics	Access to menu item **Analytics**.
	Access to create/edit/duplicate/delete reports.
Bulk handling	Permission to remove several debts in one operation
	Permission to delete several items in one operation
	Access to the section where several items can be handled in one operation
	Permission to modify searched items, not only scanned.
	Permission to modify several items in one operation
	Permission to the section where several loans can be handled in one operation
	Permission to extend due date for loans
	Permission to delete several patrons in one operation
	Access to the section where several patrons can be handled in one operation
	Permission to send messages to several patrons in one operation
	Permission to modify several patrons in one operation
	Permission to cancel several reservations in one operation
	Access to the section where several reservations can be handled in one operation
	Permission to modify several reservations in one operation
Circulation	Access to the **Check in**, **Renew** and **Check out** windows.
Collections	Permission to add/edit/delete expressions
	Permission to add/edit/delete manifestations
	Permission to add/edit/delete works
	Permission to add items
	Permission to delete items
	Special permission: Import MARC records
	Modify items
	Permission to move and merge metadata using the collections basket
	Permission to move items to other manifestations
	Access to a checkbox in the reservation wizard that makes it possible to fetch reservations from all levels in the reservation cooperation
	Access to menu item **Collections**. Includes search in collections.
	Special permission: Shelf list
	Access to menu item **Titles in demand**.
Configuration	Access to menu item **Configuration**. A role with this permission can do everything in the Configuration section.
Events	Access to menu item **Events**.
	Permission to add/edit/delete events.
General	Permission to the **Audit trail** functionality.
ILL	Access to menu item **ILL**.
	Permission to handle depots.
Integrations	Access to getting files from external sources. Access to the **External sources** tab in the **Collections** section.
	Access to getting files from SBD.
Patrons	Special permission: button **Add patron**.
	Access to menu item **Bills**.
	Special permission: button **Block/unblock patrons**.

Permission	Description
	Permission to delete memberships.
	Special permission: button **Delete patron**.
	Permission to delete signed agreements.
	Permission to download the complete patron data.
	Permission to edit the expiry date of memberships.
	Permission to access bank files.
	Permission to print notifications.
	Permission to remove debts that patrons have.
	Access to menu item **Patron**. Includes search for patrons.
	Permission to view patron loan history, used for Home service.
Periodicals	Permission to add/edit/delete subscriptions
	Permission to add/edit/delete publication pattern/plan
	Permission to receive issues
Sales	Access to menu item **Sell articles**.

Rules

Rules are the basis of the library's handling of circulation, both via the staff interface (Quria) and in the public portal (such as Arena). Using the predefined rules, you can make detailed settings regarding loan periods, overdue fees, routines for reminders, patron blocks, the maximum number of loans etc.

You find and configure rules under **Configuration**/**Settings**/**Circulation and notifications**/**Rules**.

Users with access to the **Configuration** section can view and edit rules.

It is common to configure rules on account level in order to let all branches use the same set of rules. But exceptions from the general rules can also be set on authority and branch levels.

Examples of variables that can be used in rules: manifestation type, item type, patron category and age group.

Possible settings vary between different kinds of rules, but all rule settings are constructed using a unit and a value. Sometimes you enter **Yes** or **No**, for example if it should be allowed to renew an reserved item, sometimes you need to enter a number, such as the number of days an item may be borrowed or the maximum number of reservations that a patron may make. Using the **Currency** unit, you can, for example, define the overdue charge per day.

All rules can be set to always apply or only during a particular period.

A rule can apply to anything from the entire consortium (all accounts, authorities and branches in the consortium) to a branch, and when rules conflict:

- The rule lowest in the organization hierarchy has the highest rank.
- The more specific a rule, the higher rank.

For all rules, the organisation must be selected, and when the rules are processed, the organisation has different meanings. For example, when doing a checkout, the rule is based on the current session organisation: to which branch the user has signed in. But when a renewal is done, it is the branch where the item was checked out that determines what rule should apply.

Example - no overdue fee during a limited period of time

The library wants to run a promotion to get overdue books back and decides that no overdue fees should be generated for any items that are checked in during a particular period of time. Use the **Overdue fee** rule and enter *0* as a fixed charge, and define the period of time when it should be free of charge to check in items.

The more specific a rule is, the higher up in the window it will be positioned. The rules are checked top to bottom.

Organisational level: A rule that applies to a branch is ranked higher than a rule for an account. This means that you can have a general rule that applies to all branches within the account and just enter exceptions for one or some branches. Organisation is a mandatory variable.

Other variables: A rule for an Item type is ranked higher than a rule for a Patron category. This means that a setting to the left of another setting is controlling - an organisational setting is higher ranked than a a setting for a patron category, that is higher ranked than a setting for an item type, that is higher ranked than a setting for age group, and so on.

The most controlling rule is automatically positioned at the top of the window, followed by the second most controlling, and so on.

Example - different number of items allowed to be checked out, depending on item type, patron category and organisation

The municipality has a general rule to allow each patron to borrow a maximum of 100 items, except films, where only 5 are allowed. School staff that check out items as part of their job are allowed 200 items, except films, where the same rule as for everyone else applies (5). One of the branches in the municipality is a library integrated in a school, in order to serve the students and staff of the school. At this branch, the school staff are allowed 500 items and a maximum of 10 films.

Note:
Depending on what and in which order the patron borrows different types of items, the total may vary. A recommendation is to be as general as possible if the total is of importance. In this example, the staff at the integrated school library may check out 510 items if they first borrow 500 items that are not of the item type film and after that 10 films. But if they first check out 10 films, then they can only check out 490 items more = a total of 500.

Regel: Maximum number of loans per patron

Organisation	Patron category	Item type	Age group	Value
Integrated school library branch	School staff	Film	*	10
Integrated school library branch	School staff	*	*	500
Account X	School staff	Film	*	5
Account X	School staff	*	*	200
Account X	*	Film	*	5
Account X	*	*	*	100

Please note that this is only a selection of the variables available when configuring rules.

Note:
There is a delay of a maximum of 5 minutes for any rule that is added, changed or deleted to have impact.

Rules overview

The following rules can be configured in Quria.

Some of the rules are already configured at installation, with a default value (listed in the Default setting column). You find detailed examples for some of the rules by clicking the link next to the rule.

Rule type	Descriptor	Comment	Unit	Default setting	Organisation selection is based on
Circulation control	Check-in of items with bill	Determines if an item with bill can be checked in. If no setting is made for this rule, check-in is allowed. Recom-mended to be configured on	Yes/No	Yes	Current ses-sion organ-isation

Rule type	Descriptor	Comment	Unit	Default setting	Organisation selection is based on
		Account level or higher.			
	Checkout	Determines if an item can be checked out. The item types in the system is the basis for these rule settings. See also: **Checkout**	Yes/No	Yes	Current session organisation
	Enable debt reminder	Enables usage of debt reminders. See also: **Enable debt reminder**	Yes/No	-	The organisation where the debt was created
	Enable overdue reminder	Determines if the overdue reminder set under **Levels** should be used. Do not set on Workplace level. See also: **Enable overdue reminder**	Yes/No	Yes	Checkout branch
	Enable overdue warning	Determines if overdue warning should be sent. Do not set on Workplace level. See also: **Enable overdue warning**	Yes/No	-	Checkout branch
	Enable reservation notice	Determines if reservation notice should be sent. Do not set on Workplace level. See also: **Enable reservation notice**	Yes/No	-	Pick-up branch
	Renewal	Determines if an item can be renewed. Do not set on Workplace level. See also: **Renewal**	Yes/No	Yes	Checkout branch
	Renewal of overdue item	Determines if an overdue item can be renewed. Do not set on Workplace level.	Yes/No	Yes	Checkout branch
	Renewal of reserved item	Determines if a reserved item can be renewed. Do not set on Workplace level. See also: **Minimum number of reservations to count as queue** as these rules are related	Yes/No	Yes	Checkout branch
Counts	Maximum number of loans per patron	Maximum number of loans that a patron can have. See also: **Maximum number of loans per patron**	Number	-	Current session organisation
	Maximum number of renewals per loan	Maximum number of renewals that can be made for a loan	Number	-	Checkout branch
	Maximum number of reservations per patron	Maximum number of reservations a patron can have. Do not set on Workplace level.	Number	-	Current session organisation
	Maximum number of	Maximum number of reser-	Number	-	Current session organ-

Rule type	Descriptor	Comment	Unit	Default setting	Organisation selection is based on
	reservations per title	vations that can be made per patron for a title. Do not set on Workplace level. See also: **Maximum number of reservations per title**			isation
	Minimum number of reservations to count as queue	Condition for something that happens when there is a certain number of reservations waiting for an item, can be used for example to trigger a shorter renewal period. Do not set on Workplace level. See also: **Minimum number of reservations to count as queue**	Number	-	Checkout branch
	Minimum total amount for debt reminder	The minimum debt amount to trigger debt reminders. Recommended to be configured on Account level or higher. See also: **Minimum total amount for debt reminder**	Currency	-	The organisation where the debt was created
General charges	Maximum overdue fee per item	Limitation of the maximum overdue fine per item. See also: **Maximum overdue fee per item**	Currency	-	Checkout branch
	Debt reminder fee	An administrative fee for debt reminders. To be set per reminder level. See also: **Debt reminder fee**	Currency	-	The organisation where the debt was created
	Overdue warning fee	An administrative fee for overdue warnings. Do not set on Workplace level. See also: **Overdue warning fee**	Currency	-	Checkout branch
	Overdue reminder fee	An administrative fee for overdue reminders. To be set per reminder level. Do not set on Workplace level. See also: **Overdue reminder fee**	Currency	-	Checkout branch
	Overdue reminder fee per item	Makes it possible to charge patrons specifically for individual items on the reminder. To be set per reminder level. Do not set on Workplace level.	Currency	-	Checkout branch
	Reservation notice fee	Reservation notice fee, generated as the reservation notice is sent from Quria to the patron. Do not set on Workplace level.	Currency	-	Pick-up branch

Rule type	Descriptor	Comment	Unit	Default setting	Organisation selection is based on
	Reservation fee	Reservation fee, generated as the reservation is created. Do not set on Workplace level.	Currency	-	Current session organisation
	Fee for reservations not picked up	Makes it possible to charge a fee when patrons do not pick up reservations. Do not set on Workplace level. See also: **Fee for reservations not picked up**	Currency	-	Pick-up branch
Patron control	Debt amount block	Debt amount that will automatically cause a patron to be blocked. See also: **Debt amount block**	Currency	-	Current session organisation
	Debt reminder block	An automatic block that is generated at a certain level of debt reminder. To be set per reminder level. See also: **Debt reminder block**	Yes/No	-	Current session organisation
	Notification block	Blocks patron on overdue reminders and bills. To be set per reminder level. See also: **Notification block**	Yes/No	-	Current session organisation
	Guarantor required	Determines if a patron requires a guarantor. Recommended to be configured on Account level or higher. Do not set on Workplace level.	Yes/No	-	Current session organisation
	Block patron after age transition	Blocks patron when age group transition occurs. Recommended to be configured on Account level or higher. Do not set on Workplace level. See also: **Age group transition**	Yes/No	-	Current session organisation
	Send email for age transition	Sends email based on Age group transition message text to patron when age group transition occurs. Recommended to be configured on Account level or higher. Do not set on Workplace level.	Yes/No	-	Current session organisation
Period charges	Hire charge	Hire charge rule, can be set to for example 10:- per day, 50:- per week, or a fixed charge. The hire charge rule is used both for checkout and renewal.	Currency	-	Checkouts: current session organisation, renewals: checkout branch
	Overdue fee	Overdue fee rule. A period can be set so that the fee can differ depending on the length of the delay, or a fixed	Currency	-	Checkout branch

Rule type	Descriptor	Comment	Unit	Default setting	Organisation selection is based on
		charge. See also: **Examples - overdue fees**			
Periods	Adjustment of due date because of closure	Period to add to due date if the due date is a date when the library is closed in the calendar (not a normal closed day). See also: **Adjustment of due date because of closure**	Date period	-	Checkouts: current session organisation, renewals: checkout branch
	Loan period	Loan period for a normal checkout See also: **Loan period**	Date period	28 days	Checkout branch
	Loan period for reserved items	Loan period for a checkout of an item that is reserved by someone else. This rule is related to settings for the **Minimum number of reservations to count as queue** rule.	Date period	-	Checkout branch
	Debt reminder period	Period for Debt reminder level. To be set per reminder level. See also: **Debt reminder period**	Date period	-	The organisation where the debt was created
	Overdue grace period	A grace period that can be set to delay fine generation. See also: **Overdue grace period**	Date period	-	Checkout branch
	Overdue reminder	Period for when an overdue reminder should be sent. Do not set on Workplace level. See also: **Overdue reminder**	Date period	-	Checkout branch
	Overdue warning	Determines how many days before due date an overdue warning will be sent to the patron. Do not set on Workplace level. See also: **Overdue warning**	Date period	-	Checkout branch
	Renewal period	Normal renewal period. If this is not set, the Loan period will be used.	Date period	-	Checkout branch
	Renewal period for reserved item	Renewal period for reserved items. If this is not set, the Loan period will be used. See also: **Minimum number of reservations to count as queue**	Date period	-	Checkout branch
	Validity period for reservations	How many days a reservation is considered to be active. Do not set on Workplace level.	Date period	365 days	Current session organisation
	Number of days on reser-	How many days an item should stay on the reser-	Date period	8 days	Current session organ-

Rule type	Descriptor	Comment	Unit	Default setting	Organisation selection is based on
	vation shelf	vation shelf			isation
Reservation control	Already on loan to the patron	Controls if a reservation can be placed when the patron already has a copy on loan. Do not set on Workplace level.	Yes/No	Yes	Current session organisation
	Item on shelf	Determines if reservations are allowed if there is a copy on the shelf at the pick-up location. Only applies to Arena.	Yes/No	Yes	Current session organisation
	Item reservable	Controls if an item can be reserved by the patron. Do not set on Workplace level.	Yes/No	Yes	Owning branch
	Item trappable	Defines if items should be able to trap reservations or not. See also: **Item trappable**	Yes/No	Yes	Owning branch
Self-service control	Checkout	Determines if an item can be checked out on a self-service machine. See also: **Checkout** Used only by SIP2 self-service machines.	Yes/No	-	Current session organisation
	Check-in	Determines if an item can be checked in on a self-service machine. Used only by SIP2 self-service machines. See also: **Check-in**	Yes/No	-	Current session organisation
	Check-in of items with bill	Determines if an item with bill can be checked in. The corresponding rule for Circulation control is also checked, so if it is generally not allowed to check in an item on a bill then it will also stop the self-service check-in. Used only by SIP2 self-service machines.	Yes/No	Yes	Current session organisation
	Renewal	Determines if an item can be renewed out on a self-service machine. Used by SIP2 self-service machines and by Arena. See also: **Renewal**	Yes/No	-	Current session organisation
	Magnetic	Determines if an item is sensitive to magnetic pulses. Only applicable if magnetic equipment is used. Used only by SIP2 self-service machines.	Yes/No	-	Current session organisation

Extra settings for the rule

At the bottom of many rules there is a section for **Extra settings for the rule**. There may be rule-specific extra settings such as preventing that reminders are sent to patrons via SMS.

Default message

In several places, you can add a default message. This message is displayed along with the patron details in the circulation windows. You only enter a text here when you want to show a different message than the pre-defined message. It is recommended to first start using Quria to evaluate if there is any reason to use something other than the pre-defined messages.

Adding rules

Note:
There is a delay of a maximum of 5 minutes for any rule that is added, changed or deleted to have impact.

1. Go to the **Configuration** section in the main menu.
2. Click **Settings** in the top menu, and under **Circulation and notifications**, click **Rules**.
3. Select a rule type, a rule and, in some cases, a level.
4. Select the level in the organisation.
   Any existing rules on this level is displayed.
5. Click **Add rule**.
   The **Add rule** window opens.
6. Fill in the settings that apply. Mandatory fields are marked with an asterisk.
7. Click **Save**.

Note:
The rules for **Circulation control** are used to prevent checkout or renewal; not by setting the rules for **Loan period**, **Renewal period** or **Renewal period for reserved items** to 0.

Editing or deleting rules

Note:
There is a delay of a maximum of 5 minutes for any rule that is added, changed or deleted to have impact.

1. Go to the **Configuration** section in the main menu.
2. Click **Settings** in the top menu, and under **Circulation and notifications**, click **Rules**.
3. Select a rule type, a rule and, in some cases, a level.
4. Select the level in the organisation.
   Any existing rules on this level is displayed.
5. Click the rule that you want to edit or delete.
   The **Edit rule** window opens.
6. Make the changes that you wish and click **Save**, or click **Delete rule**.

Detailed information - rules

You find an overview of all rules here: Rules

Some tips and examples regarding how different rules can be used and how they relate follow below.

Rule type Circulation control

Checkout

A limitation can be set for example on Minimum age if there are items that only adult persons should be able to check out.

Note:
At checkout, rule settings for the organisation where the checkout is carried out are checked, that is, the branch that the user has signed into. When a renewal is carried out, the rule settings for the branch where the item was originally checked out are checked.

Enable debt reminder

This rule depends on settings made for the following other rules:

- General charges/Debt reminder fee
- Counts/Minimum total amount for debt reminder
- Patron control/Debt reminder block
- Periods/Debt reminder period

See also: **Debt reminders**

Enable overdue reminder

There are 6 levels and bill to user for overdue reminders.
This rule depends on settings made for the following other rules:

- General charges/Overdue reminder fee
- Patron control/Notification block
- Periods/Overdue reminder

Enable overdue warning

This rule depends on settings made for the following other rules:

- General charges/Overdue warning fee
- Periods/Overdue warning

Enable reservation notice

In general, reservation notices should be enabled, but exceptions for patron categories such as *Home service*, that do not visit the library themselves, may be needed.

Renewal

This makes it possible for the library not to allow renewal of some items of which they do not have plenty of holdings.

Rule type Counts

Maximum number of loans per patron

If different rules are configured for, for example item types, plus a general rule, the first rule that applies for a certain transaction will apply.

Example:

Max 10 CDs

Max 10 DVDs

Max 15 (general)

Depending on what and in which order the patron borrows different types of items, the total may vary. A recommendation is to be as general as possible if the total is of importance.

Maximum number of reservations per title

In general, more than one reservation per title is not allowed, but some exceptions for patron categories such as *Staff* and *Teachers* may be useful.

Minimum number of reservations to count as queue

Depending on the setting for this rule, patrons might, for example, be allowed to renew items even if reservations exist.

This rule determines how long the reservation queue for a title should be before **Circulation control** / **Renewal of reserved items** and **Periods** / **Renewal period for reserved items** are checked. If you always want these to be applied, then set this rule to *0*, or do not add this rule. If you want it once there are 2 active reservations, then set the rule to *2*

Minimum total amount for debt reminder

Example: If this rule is set to *100*, then the debt reminder will be sent to the patron when the amount is reached after the number of days set under **Periods**/**Debt reminder period**/**Debt reminder 1**.

This rule depends on settings made for the following other rules:

- Circulation control/Enable debt reminder
- General charges/Debt reminder fee
- Patron control/Debt reminder block
- Periods/Debt reminder period

Rule type General charges

Maximum overdue fee per item

You can configure that an overdue item can generate a maximum of a defined amount, no matter how late it is, for example one amount for children and another amount for the adult age group.

Debt reminder fee

This rule depends on settings made for the following other rules:

- Circulation control/Enable debt reminder
- Counts/Minimum total amount for debt reminder

- Patron control/Debt reminder block
- Periods/Debt reminder period

Overdue warning fee

This rule depends on settings made for the following other rules:

- Circulation control/Enable overdue warning
- Periods/Overdue warning

Overdue reminder fee

Please note that it is not possible to distinguish between notification methods. If a fee is configured, it will be generated for reminders sent by mail, email and SMS.

This rule depends on settings made for the following other rules:

- Circulation control/Enable overdue reminder
- Patron control/Overdue reminder block
- Periods/Overdue reminder

Fee for reservations not picked up

The fee is triggered if a reservation that is on the reservation shelf is cancelled, regardless of if it is cancelled by the staff, the patron, or automatically when the item is checked in and the shelf time has passed.

Rule type Patron control

Debt amount block

Note that you can select to exclude billed amounts from the debt amount block using the setting **Organisation settings/ Exclude bills from patron account block**.

Debt reminder block

This rule depends on settings made for the following other rules:

- Circulation control/Enable debt reminder
- Counts/ Minimum total amount for debt reminder
- General charges/Debt reminder fee
- Periods/Debt reminder period

Notification block

This rule depends on settings made for the following other rules:

- Circulation control/Enable overdue reminder
- General charges/Overdue reminder fee
- Periods/Overdue reminder

Rule type Periods

Adjustment of due date because of closure

This rule can be used if you do not want all your items to be returned on the first day after a closure period such as Christmas or Easter. For example, if you have an adjustment period of 7 days, then items due on Good Friday would have their due date set to the following Friday, or items due on Easter Monday would have their due date set to the following Monday.

For mobile units, this can be used if a tour gets cancelled because of a bank holiday, in order to make the adjustment correspond to the time period between two tours. In a case where you visit a bus stop every 3 weeks, you set the value to *21*.

Loan period

For smart handling of an increased number of days that patrons may keep items during summer time, you can work with expiry dates of the rules for this to be managed automatically.

Debt reminder period

The rule is based on the day that the amount for the debt reminder is reached. In order to send the first reminder after one week and the second after three weeks, you set the number of days to *7* and *21* respectively.

This rule depends on settings made for the following other rules:

- Circulation control/Enable debt reminder
- Counts/Minimum total amount for debt reminder
- General charges/Debt reminder fee
- Patron control/Debt reminder block

Overdue grace period

You may want to allow for example 2 days after the due date before fines are generated. The grace period is always taken into account, also when an item is returned after the grace period has passed.

Overdue reminder

Overdue reminders are set per level and all levels are based on due date, which means that it is the total time since due date that is used, not the number of days between the reminders. If the generation of overdue reminders have been delayed for some reason, they will all start by level 1 regardless of the delays.

This rule depends on settings made for the following other rules:

- Circulation control/Enable overdue reminder
- General charges/Overdue reminder fee
- Patron control/Overdue reminder block

Overdue warning

The overdue warning can only be sent as email or SMS.

This rule depends on settings made for the following other rules:

- Circulation control/Enable overdue warning
- General charges/Overdue warning fee

Rule type Reservation control

Item trappable

Having less strict trapping rules than item reservable rules makes it possible to also trap reservations where staff has chosen to overrule the **Item reservable** rule. This rule is used in the shelf list, trapping of items and when calculating if there is a reservation queue.

Rule type Self-service control

Checkout

This rule is item-based only and can be used for item types that a library may wish not to be checked out on a self-service machine. If this rule allows the transaction, then the other rules are checked normally.

Check-in

This rule is item-based only and can be used for item types that a library may wish not to be checked in on a self-service machine. If this rule allows the transaction, then the other rules are checked normally.

Renewal

This rule is item-based only and can be used for item types that a library may wish not to be renewed on a self-service machine. If this rule allows the transaction, then the other rules are checked normally.

Rule flows

You find information about some more advanced rule flows here:

Example - overdue notifications

Examples - overdue fees

Examples - reservation rules

Age group transition

Example - overdue notifications

Different rules are needed to set up overdue notifications in Quria. This example includes:

- Overdue warning: Notification that the item the patron has on loan will soon reach its due date.
- Overdue reminder 1: Notification that the item the patron has on loan is 7 days overdue. Excluding library staff from this notification.
- Overdue reminder 2: Notification that the item the patron has on loan is 14 days overdue, and this entails a fee of 10.

All the examples are made from the Rules page, that you open by clicking **Configuration** in the main menu and then selecting **Rules** under **Settings/Circulation and notifications**.

Overdue warning

In this example, Quria will send out a notification that a book on loan expires in 3 days.

1. Select the **Periods** rule type and the **Overdue warning** rule.
2. Click **Add rule**.
3. Give the rule a descriptive name, such as *Overdue warning*. Consider if the correct organisation is already selected or if you need to change it, and if any other settings need to be made. Add a user message if you want to. Enter *3* for **Number of days**, and click **Save**.
4. Select the **Circulation control** rule type and the **Enable overdue warning** rule.
5. Click **Add rule**.
6. Give the rule a descriptive name, such as *Overdue warning enabled*. Make sure to use the same organisation as in the period rule, and consider if any other settings need to be made. In this case, select **Book** for manifestation type. Select **Yes** for **When above, then**, and click **Save**.

You find your new rules in the overview at the bottom of the window.

Overdue reminder 1

In this example, Quria will send out a notification that a book on loan expired 7 days ago. Steps 8-9 prevents the reminder from being sent to library staff.

1. Select the **Periods** rule type, the **Overdue reminder** rule and the **Overdue reminder 1** level.
2. Click **Add rule**.
3. Give the rule a descriptive name, such as *Overdue reminder 1*. Make settings similar to the *Overdue warning*, but for **Number of days**, enter *7*, and click **Save**.
4. Select the **Circulation control** rule type, the **Enable overdue reminder** rule and the **Overdue reminder 1** level.
5. Click **Add rule**.
6. Give the rule a descriptive name, such as *Overdue reminder 1 enabled*. Make sure to use the same organisation as in the period rule, and consider if any other settings need to be made. In this case, select **Book** for manifestation type. Select **Yes** for **When above, then**, and click **Save**.
7. Select the **Circulation control** rule type, the **Enable overdue reminder** rule and the **Overdue reminder 1** level.
8. Click **Add rule**.
9. Give the rule a descriptive name, such as *Overdue reminder 1 - staff*. Make sure to use the same organisation as in the period rule, and consider if any other settings need to be made. In this case, select **Staff** for patron category and **Book** for manifestation type. Select **No** for **When above, then**, and click **Save**.

You find your new rules in the overview at the bottom of the window.

Overdue reminder 2

In this example, Quria will send out a notification that a book on loan expired 14 days ago, and enabling a fee of 10 for each notification.

1. Select the **Periods** rule type, the **Overdue reminder** rule and the **Overdue reminder 2** level.
2. Click **Add rule**.

3. Give the rule a descriptive name, such as *Overdue reminder 2*. Make settings similar to the *Overdue reminder 1*, but for **Number of days**, enter *14*, and click **Save**.
4. Select the **Circulation control** rule type, the **Enable overdue reminder** rule and the **Overdue reminder 2** level.
5. Click **Add rule**.
6. Give the rule a descriptive name, such as *Overdue reminder 2*. Make sure to use the same organisation as in the period rule, and consider if any other settings need to be made. In this case, select **Book** for manifestation type. Select **Yes** for **When above, then**, and click **Save**.
7. Select the **General charges** rule type, the **Overdue reminder fee** rule and the **Overdue reminder 2** level.
8. Click **Add rule**.
9. Give the rule a descriptive name, such as *Overdue reminder 2 – fee* and make the settings needed. For **Overdue reminder fee**, enter *10*.

You find your new rules in the overview at the bottom of the window.

Examples - overdue fees

Overdue fees can either be fixed or per day. It is also possible to define different amounts depending on the length of the delay by setting different periods on the rules. It is the rule with the period that matches the overdue period that will be used, not a combination if the overdue period overlaps several rule periods.

Fixed fee in combination with periods

In this example, a delayed item should generate a fixed fee of:

- 10:- if the delay is up to 7 days (*Period=7*)
- 20:- if the delay is up to 14 days (*Period=14*)
- 30:- if the delay is more than 14 days (*Period=9999*)

An item that is delayed 4 days will get an overdue fee of 10:-

An item that is delayed 10 days will get an overdue fee of 20:-

An item that is delayed 30 days will get an overdue fee of 30:-

Charge per day in combination with periods

In this example, a delayed item should generate a charge per day of:

- 1:-/day if the delay is up to 7 days (*Period=7*)
- 2:-/day if the delay is up to 14 days (*Period=14*)
- 3:-/day if the delay is more than 14 days (*Period=9999*).

An item that is delayed 4 days will get an overdue fee of 4:- (1:- * 4 days)

An item that is delayed 10 days will get an overdue fee of 20:- (2:- * 10 days)

An item that is delayed 30 days will get an overdue fee of 90:- (3:- * 30 days)

Examples - reservation rules

Different rules affect how reservations are handled. This example includes:

- Length of reservation queue: Defining the number of reservations on a title that is considered a queue.
- Length of renewal period depending on reservation queue: Shortening the renewal period if there is a queue.
- Condition for renewal of reserved item: Denying patrons from renewing items of a certain type that someone else has reserved.
- Reservation scope: Limiting reservations of a certain manifestation type to home branch or home authority only.

All the examples are made from the Rules page, that you open by clicking **Configuration** in the main menu and then selecting **Rules** under **Settings/Circulation and notifications**.

See also: The reservation logic

Reservations queue

The reservations queue defines how many reservations that are needed before it is considered a queue. When this condition is fulfilled, it can be used to trigger other rules. If you set the reservations queue to 3, it means that as long as there are none, one or two reservations made on an item on loan, no other actions will be triggered. It is only when the third reservation is made, that, for example, a shorter renewal period is triggered. A trapped reservation is not taken into account when calculating the reservation queue.

Note:
Calculation of the reservation queue is affected by a number of factors, such as settings for reservation cooperation. This means that the value set for the reservations queue might not always be reflected exactly as defined.

This is how you define that three reservations are required to be considered a reservations queue.

1. Select the **Counts** rule type and the **Minimum number of reservations to count as queue** rule.
2. Click **Add rule**.
3. Give the rule a descriptive name, such as *Reservations queue 3*. Consider if the correct organisation is already selected or if you need to change it, and if any other settings need to be made. Enter *3* for **Minimum number of reservations to count as queue**, and click **Save**.

Renewal periods

In this example, let’s assume that the normal checkout period is 28 days and there is no period defined for renewals. This means that when a patron renews an item, they get another 28 days before the item has to be returned. But now we want to set a shorter renewal period if there is a reservation queue.

1. Select the **Periods** rule type and the **Renewal period for reserved item** rule.
2. Click **Add rule**.
3. Give the rule a descriptive name, such as *Renewal period for reserved items*. Consider if the correct organisation is already selected or if you need to change it, and if any other settings need to be made. Enter *7* for **Number of days**, and click **Save**.

Now, a patron that has an item on loan and want to renew it, the renewal period depends on if there is a reservation queue - in this example, if three or more patrons have reserved the same title.

Renewal of reserved item

The default setting allows renewal of reserved items, but in this example we are going to restrict loans of DVDs with reservations.

1. Select the **Circulation control** rule type and the **Renewal of reserved item** rule.
2. Click **Add rule**.
3. Give the rule a descriptive name, such as *Deny renewal of reserved DVDs*. Consider if the correct organisation is already selected or if you need to change it. Select **DVD** for manifestation type. Select **No**, and click **Save**.

Now, a patron cannot renew a DVD with three or more reservations (taking the Minimum number of reservations to count as queue rule into account).

Reservation scope

The default setting makes it possible to reserve items from any branch in the organisation, but in this example, we will limit reservation of Blu-Rays to the home branch (or home authority) only.

1. Select the **Reservation control** rule type and the **Item reservable** rule.
2. Click **Add rule**.
3. Give the rule a descriptive name, such as *Reservation scope Blu-Ray*. Consider if the correct organisation is already selected or if you need to change it, and if any other settings need to be made. Select **Blu-Ray** for manifestation type and **Home branch only** (or **Home authority only**) for reservation scope. Select **Yes**, and click **Save**.

Now, the system will only trap an item for a reservation of Blu-Rays when the reservation pick-up branch matches the home branch of the item.

Note:
The Item reservable rule depends on the item's home branch and not on where you are currently signed in, and for trapping, the item's home branch and the reservation's pick-up branch are compared. This means that an item that belongs to Branch A will not be trapped for a reservation with pick-up branch B if you have defined the reservation scope **Home branch only**. The same goes for **Home authority only**; on authority level instead of branch level.

Troubleshooting rules

Sometimes it can be difficult to understand the impact of rules, especially if many rules are configured.

A rule can apply to anything from the entire consortium (all accounts, authorities and branches in the consortium) to a branch, and when rules conflict:

- The rule lowest in the organization hierarchy has the highest rank.
- The more specific a rule, the higher rank.

To visualize the ranking of rules:

1. Select the rule that you want to investigate.
2. Select the branch of interest.

The rules that affect the branch are listed, in the order they will be evaluated. The top rule has supremacy.

When you click **Show historical rules** in the rules configuration window, you will see an overview of current rules and rules that have expired.

For **General charges**/**Overdue reminder fee** and /**Overdue warning fee**, Workplace should not be selected.

Organisations

Organisation structure

An organisation in Quria is built up as a hierarchy:

Level 1: Consortium (contract)

Level 2: Account (public/schools/prisons etc.)

Level 3: Authority (area within the account)

Level 4: Branch (physical library) with different work places (desk, self-service, Arena, etc.)

Level 5: Department (children, science, etc. for logistics only)

Functions on different levels

Collection metadata are stored on consortium level.

General patron data (name, address, etc.) is stored on consortium level.

Specific patron data (patron category, active card, etc.) is stored on account level. A patron has to be authorised for an account to make loans etc.

All items, reservations, loans, acquisitions, periodicals and ILL data are stored on account level.

Analytics data is stored on the level where the data belongs.

Rules can be set on all levels; the lower in the hierarchy, the stronger. For example, if a loan period is set to four weeks on consortium level and two weeks on account level, then the loan period will be two weeks for that account.

In the Configuration section, under Settings/Organisations, you can view and make settings related to organisations maintenance.

Organisations

A list showing the tenant organisation hierarchy, with consortium, accounts, authorities and branches and how they relate (parent). You also see archived organisations.

Organisation settings

Select an organisation to view or edit its settings.

To add a new setting, click **Add setting**.

Contact information

Enter the contact information for the organisation.

The **Payment receiver** information is used for online payments in Arena. **Organisation number** is mandatory if online payments are to be used. These settings can be made on all organisational levels. When payments are done in Arena, the **Payment receiver** information is shown under **Recipient**. If no information is entered, the organisation name is used.

Branch information texts

You can add two sets of branch information, such as opening hours, to be included on messages to patrons and on receipts. These settings can be made on branch level only.

Circulation and patrons

You can define a default patron category that will be used when new patrons are created. This setting can be added on any organisational level. If the same default category should be used for all authorities/branches within an account, you only need to set the default category on the account level.

You can configure a branch as a school branch by checking the box **School**. This setting can be made on branch level only. If there are branches marked as School, a dropdown with schools will show up in the patron details along with a field for Class.

You can enter a minimum age for patrons to self-register in Arena. This setting can be made on account level only.

If you check the **Block patron accounts without signed agreements**, all patrons that have not signed an agreement of type General terms and conditions will be automatically blocked in Arena and Quria. In Quria, the staff can overrule the block, but in Arena, patrons will not be able to for example make reservations or renew loans. This setting is available only if the Digital agreements module has been activated. This setting can be made on account level only.

Note:
The **Block patron accounts without signed agreements** setting affects all patrons, including staff, institutions and other libraries. If the box is not checked, only patrons that are added and patrons that have entered a new age group (if the rules have been configured for this) must sign agreements.

By default, fees are calculated based on the number of days that have passed since the due date. But you can also configure that the days that the library is closed is omitted, by checking the **Base hire charges and overdue fees on calendar's open days** box. This setting can be made on account level only.

By default, billed amounts are included when calculating patron account block based on debts. If you want to exclude bills from this calculation, you check the box for this purpose. When the box is checked, billed amounts and debts will be displayed separately in the patron details window. This setting can be made on account level only.

Note:
Hire charges are only affected if the loan period is prolonged due to calendar closed days. For example, if you have a hire charge per day, and the loan time is 14 days, you will always be charged for 14 days even if some of these are closed. But if you get a loan period of 16 days due to calendar closed days, you will still only be charged for 14 days.

Bills

You can select that overdue fees can be included on bills, and if you want it to be possible to settle bills at the library, by checking the boxes. **Number of payment days for bill** enables printing of last payment date on bills (provided that the variable {{LastPaymentDate}} is included in the message text for print-out of bills). These settings can be made on authority level only.

Note:
If an integration is made to an external payment provider such as Visma, then the setting **Bills can be paid at the library** will be overruled.

ILL

Enter settings for ILL if using NCIP. These settings can be added on any organisational level, but are usually added on branch level as the library code and number can be branch specific.

Banking (membership)

For patron membership, bank settings are controlled on the authority level. Enter the number of days before the membership expires that an automatic bank withdrawal is made, and the payment period for the bank. These settings can be made on authority level only.

See also: **Patron membership**

Acquisitions

The default budget year is defined on the account level. The delivery and invoice addresses are set up under Acquisitions and periodicals and can be selected on different organisational levels. These addresses are printed on order print-outs and order email messages.

Workplaces

Workplaces are added on branch level. Select a branch in the dropdown to show a list of the workplaces and their descriptions. You define the RFID equipment and sign pad equipment for each workplace. For each workplace, you can select if different kinds of receipts should be printed or sent as email as default. You can always select or deselect these options when working in the **Check out**/**Renew**/**Check in** windows. You also define if the workplace should be used for self-service library access control.

See also: **RFID configuration** and **Sign pad configuration**

Departments

Departments are added on branch level. An example of a department can be *Children*.

For each department you can choose which section should be default section for the department.

Sections

Sections are added on account level. An example of a section can be *Crime*.

Mobile library

Quria supports mobile units - usually buses or vans that serve as a travelling library for communities without access to a library. You maintain routes and stops here.

See also: **Settings for the mobile library**

Adding or editing an account, authority or branch

You add account, authority and branch on the same page; the selection of parent decides the level in the hierarchy.

1. Go to the **Configuration** section in the main menu.
2. Under **Organisations**, click **Organisations**.
3. Click on a row in the table to edit an entity.
4. Click **Add organisation** to add an entity.
5. Add a code, short name and a name.
6. Select Parent in the dropdown. Level and type will be populated automatically.
7. Click **Save**.

Note:
When you have added a branch, you must add at least one workplace to it.

Adding or editing a workplace

Workplaces are added on the branch level.

1. Go to the **Configuration** section in the main menu.
2. Under **Organisations**, click **Workplaces**.

3. Select authority and branch from the dropdown menus.
   The current workplaces will be shown.
4. To edit a workplace, click the workplace name.
5. To add a new workplace click **Add workplace**.
6. Give your workplace a name and a description.
7. Enter your RFID equipment settings.
8. Select if the different receipt types should be printed as default. You can always select or deselect these options when working in the **Check out**/**Renew**/**Check in** windows.
9. Click **Save**.

Making a workplace accessible as Open Library

Open Library is enabled per branch and this is configured by Axiell.

1. Select branch and click on the workplace in the list.
2. Check **This workplace is used as Open Library access control**.
3. Click **Save**.

Adding or editing a department

Departments are added on the branch level.

1. Go to the **Configuration** section in the main menu.
2. Under **Organisations**, click **Departments**.
3. Select authority and branch from the dropdown menus.
   The current departments will be shown.
4. To edit a current department click the department name.
5. Click **Add department** to add a department.
6. Add a code and a name for the department.
   The code will appear in dropdown menus for example when adding a new item, or creating a shelf list.
7. Select a default section if you want to.
8. Check the **Hide externally** box in case you want to exclude holdings at this department from display in the public portal such as Arena. To also affect the search index in Arena, a re-index must be done. Please contact Axiell for more information.
9. Click **Save**.

Adding or editing a section

Sections are added on an account level. To add a section:

1. Go to the **Configuration** section in the main menu.
2. Under **Organisations**, click **Sections**.
   The current sections will be shown.
3. To edit a current section click the section name.
4. Click **Add section** to add a section.

5. Add a code and a name for the section.
6. Check the **Hide externally** box in case you want to exclude holdings at this section from display in the public portal such as Arena. To also affect the search index in Arena, a re-index must be done. Please contact Axiell for more information.
7. Click **Save**.

Metadata and items configuration

In the Configuration section in the main menu, under Settings/Metadata and items, you can view and make settings related to items. Item statutes and item types are configured on account level.

Item statuses

Manual statuses

Some statuses can be added manually (for example when an item is lost). An item with a manually added status cannot be reserved, does not appear as available in the public portal and is not available in the shelf list. When an item with a manually added status is checked in, checked out or renewed, its status is removed. An item can have multiple manual statuses at a time.

1. Click **Add status** to add a new status, that can be used when editing an item.

Automatic statuses

Some statuses are set by the system (for example On loan or In transit). The system statuses are displayed in the transaction log and in a number of other places.

The table below describes the different statuses that can be set automatically by the system. An item can only have one automatic status at a time.

Note:
Some statuses may be labelled differently depending on in which context they are displayed.

Transaction status	Description	Item can be deleted from Quria
Available	This status is set automatically in the following situations, unless some other status, such as **Trapped** or **In transit**, is relevant: • When an item is checked in • When a manual status is cleared • When ordered items are received by checking in	Yes
On loan	This status is set automatically when an item is checked out. The status is removed automatically when the item is checked in. Under some circumstances, another status, such as **Trapped** or **In transit**, may be set at check-in.	No
Renewed	This status is set automatically when an item is renewed The status is removed automatically when the item is checked in. Under some circumstances, another status, such as **Trapped** or **In transit**, may be set at	No

Transaction status	Description	Item can be deleted from Quria
	check-in.	
In transit	This status is set automatically when an item belonging to another branch is checked in. The status is removed automatically when the item is checked in at its home branch.	Yes
Trapped	This status is set automatically when an item is trapped at the reservation pick up-branch. The status is removed automatically when: • the reservation is cancelled • the item is checked in and the last pick-up date has passed • the item is checked out to the patron that reserved the item • the item is checked out to another patron	No
Trapped (cancelled)	This status is set automatically when the reservation for a trapped item is cancelled. The status is removed automatically when the item is checked in.	Yes
Trapped, in transit	This status is set automatically when an item is trapped in a branch other than the reservation pick-up branch. The status is removed automatically when the item is checked in at the pick-up branch.	No
Trapped, in transit (cancelled)	This status is set automatically when the reservation for an item trapped in transit is cancelled. The status is removed automatically when the item is checked in at the pick-up branch.	Yes
Internal handling: ILL out	This status is set automatically when an outgoing ILL has been trapped, but the user doesn’t want to send the item to the external library immediately. The status is cleared when the item is scanned in the **Check in** or **Check out** window and the ILL has been cancelled or deleted, or when the item is actually sent to the receiving library via **Check-in** window.	No
Internal handling: ILL out cancelled	This status is set automatically when an item in status **Internal handling: ILL out** is cancelled. The status is cleared when the item is scanned in the **Check in** or **Check out** window and the ILL has been cancelled or deleted.	Yes
Internal handling: ILL in	This status is set automatically when an incoming ILL item has been returned by the patron, but the user doesn’t want to return the item to the external library immediately. The status is cleared when the item is scanned in the **Check in** or **Check out** window and the ILL has been cancelled or deleted, or when the item is actually sent to the receiving library via **Check-in**	No

Transaction status	Description	Item can be deleted from Quria
	window.	
On bill	This status is set automatically when an overdue item is billed. The status is removed automatically when the item is checked in (if that is allowed by the rules).	No
Bill paid	This status is set automatically when a bill is paid. These items can be searched for in bulk items and also be deleted from there.	Yes
On order	This status is set automatically when • items are created in the order process • depot items are created automatically via NCIP The status is removed automatically when the item is checked in. The status has the following effects: • The item cannot be checked out • The item can be reserved in Quria • The item can be reserved in the public portal	Not in manifestation details or in bulk items, but can be deleted from the order in **Acquisitions** and in **Depot handling**
Received	This status is set automatically when an ordered item is received in **Acquisitions/Orders**.	Yes

Item types

The item types for the account. The item types are mainly used to be able to set different rules for items of different types, such as different loan periods.

You can set an item type to be the default category for ILL in.

You can configure any item type as **Reference**. This means that items of this type will appear as **Reference only** in the public portal such as Arena. Items set as item type **Reference** will also be included in author fund reports.

1. Click **Add type** to add a new item type.

Item receipt types

You can configure item receipt types to indicate how items were obtained, e.g. gift, deposit or exchange. If you configure item receipt types, you can select these when adding or editing items and requisitions, and also include this in analytics.

Metadata suppliers

Metadata suppliers for all organisations. This functionality is in preparation for coming development and not used at the moment.

Manifestation types

The manifestation types and their codes are displayed.

Fictive holdings need to be created for manifestations without holdings in order for patrons to find these records also in filtered searches (for example via extended search) in a public portal such as Arena.

You can determine if titles of some manifestation types, such as eBooks and eAudio, should create fictive holdings in the public portal.

1. Click a manifestation type in the list and check **Automatically create fictive holdings in public portal**.

Note:
Modifications related to fictive holdings require re-indexing of the public portal. Please contact Axiell for more information.

Patrons configuration

In the Configuration section, under Settings/Patrons, you can view and make settings related to patron maintenance.

Age groups

The list shows the start age for the age groups defined for each account. You can also add new age groups and delete age groups no longer of interest.

If you check **Guarantor** for an age group, there will be a possibility to either create a connection to another patron that is registered in Quria or to enter a guarantor name when creating new patron of this age group.

Age groups are used for the following purposes:

- Rules can be set up for each age group, such as different rules for overdue reminders depending on patron age.
- The age group transition function can be used for the library to inform or reach out to a patron when a certain age is reached.

See also: **Age group transition**

Genders

The list shows the genders defined. These are available for selection in patron details.

The codes for female/male need to be set to F/M if patron gender is set automatically via input of national ID.

You can also add new genders and delete genders no longer of interest.

Patron categories

The list shows the patron categories defined for each account, such as normal, staff or interlibrary loan. Patrons can belong to different categories in different accounts; for example staff at a school and normal patron at the public library. You can also add new patron categories and delete categories no longer of interest.

You can define one category as **Default category for self-registered patrons**. This category must be defined in order for patrons to register themselves online and for example make reservations and borrow e-books immediately.

You can define one category as **Default category for self-registered patrons that sign agreement**. This category is set automatically when a self-registered patron has signed an agreement of the type General terms and conditions. This setting is available only if the Digital agreements module has been activated.

You can define one category as **Default category for automatically created ILL out patrons (libraries)**. This is used when the system is integrated against a supplier with library information. When Quria receives new library information, also corresponding patrons that can be used for ILL out are created belonging to this category.

You can mark several patron categories as **Category for patrons (libraries) used for ILL out**. Circulation routines will support the **ILL out** process for all reservations and loans that are connected to patrons belonging to patron categories with this marking.

You can mark one or several categories as **Category used for Home service**. The loan history of all patrons that belong to a patron category marked for Home service will be preserved.

> **Note:**
> If you uncheck using a patron category for Home service, all loan history for all patrons assigned to this category will be erased (unless the patron has selected to save their loan history). The same applies if you change a patron's category to a non-Home service category. In both cases you receive a confirmation warning.
>
> Patrons must select to display loan history in Arena in order to see the loan history themselves in Arena, and they will only see loans starting from this point in time - not previous loan history.

You can mark several patron categories with **Allowed to be printed on receipts** in order to make it possible to include these categories on reservation slips.

When connecting the Quria library system to a student interface, it can be useful to mark patron categories as default student/teacher/librarian category used for automatic patron sync. Patrons of these categories will then be assigned proper permissions in the school library system. You can setup one patron category for each type. Patrons of patron categories without type student/teacher/librarian will be considered as students.

You can define a default patron category that is used when new patrons are added. The setting is done under **Configuration**/**Settings**/**Organisation settings** and can be set on any organisational level.

Titles

The list shows the titles defined. These are available for selection in patron details. You can also add new titles and delete titles no longer of interest.

Articles to sell

The list shows the articles that have been registered for sale in Quria. You can add new articles and also decide if they should become available for sale right away or later.

> **Tip:**
> If you want to be able to record debts or payments of non registered articles, to allow for ad hoc costs, add an article without amount. When this article is chosen, an amount must be entered manually.

Membership types

The list shows the membership types defined for the account. These are available for selection in patron details. You can also add new membership types and delete the ones no longer of interest.

The Membership functionality makes it possible for the library to limit the validity period of patron accounts, for example if the library wants to get hold of patrons on a regular basis to check personal data, or the library charges a fee for its services. This functionality is enabled at the time of installation of Quria. When a membership expires, the patron cannot make reservations or check out items unless the membership is renewed.

The different membership types define the duration and fee for each membership.

> **Note:**
> The duration of continuous memberships should never be shorter than the **Days before expiry** setting for **Banking (membership)**, set under **Organisation settings**, if bank payment is used.

1. Go to the **Configuration** section in the main menu. The top menu **Settings** opens.
2. Under **Patrons**, click **Membership types**.

3. Click **Add membership type**. Mandatory fields are marked with an asterisk.
4. Fill in the name, duration and fee of the membership type. Enter *0* if there is no fee.
5. Check **Continuous membership** to automatically renew the membership when it expires. Only applicable if a fee is charged. For patrons with automatic bank payment, the expiry date will be updated. For patrons with manual payment, a membership debt will be created and when the debt is paid, the new expiry date will be set.
6. Check **Inherit due date from main contact** for memberships that allow multiple patrons in one membership, and where all the patrons should get the same expiry date as the main contact. Only applicable if a fee is charged.
7. Click **Save**.

The membership type appears in the list and is also available for selection in the patron data.

See also: **Patron membership** and **Adding or editing an account, authority or branch**

Custom fields

Using custom fields makes it possible to include customer-specific data for patrons to use for statistics and search. The fields and values that you enter under Custom fields are available when editing patron data, and when creating reports.

Debt/bill removal types

You can define debt/bill removal types in order to support more consistent work flows when handling removal of debts and closure of bills. You enter a code and a reason for removal for each entry. The reasons for removal are available for selection when removing a debt or closing a bill for a patron. The removal type codes are available for selection when creating analytics for debts.

Once you have defined removal types, using the Internal comment/Comment field when removing a debt or closing a bill is no longer mandatory.

Digital agreements

The list shows the agreements that have been created for the account. You can create new agreements and add translations of agreements.

You can also make a copy of an existing agreement including all its translations and use as template for a new agreement by clicking **Copy agreement** in the context menu of an agreement.

Agreements should always be available at least in the default language of the Quria installation. Existing translations for each agreement are displayed when you click an agreement in the list.

> **Note:**
> Make sure keep accessibility in mind when adding agreements and introductory texts, for example by formatting headings with heading paragraph formats using the toolbar in the agreement editors. *Heading 1* and *Heading 2* are already in use in Arena so you should use *Heading 3* as the top level for the agreement texts.

Each time an agreements is saved, it gets a new version number. The version number, the date and information about who saved the agreement is displayed when you click an agreement in the list.

1. Click **Add agreement**.
2. Select type of agreement and enter a general name. Selecting the **General terms and conditions** agreement triggers specific functionality in Quria and Arena.
3. Enter a name of the first agreement and select the corresponding language in the dropdown list.

4. Add an introductory text that is displayed along with the actual agreement text in Arena, if you want to.
5. Enter the agreement text. You can use variables for patron information, library information, agreement information and general information such as date.

These variables can be used to customise agreements:

<table>
<tr><th>Variable</th><th>Description</th></tr>
<tr><td>{{PatronTitle}}</td><td>Patron’s title</td></tr>
<tr><td>{{PatronFirstName}}</td><td>Patron’s first name</td></tr>
<tr><td>{{PatronLastName}}</td><td>Patron’s surname</td></tr>
<tr><td>{{PatronCategory}}</td><td>The patron category that the patron belongs to</td></tr>
<tr><td>{{MembershipType}}</td><td>The type of membership that the patron has</td></tr>
<tr><td>{{PatronIdentifier}}</td><td>Patron’s unique number</td></tr>
<tr><td>{{PatronCard}}</td><td>Patron’s card number</td></tr>
<tr><td>{{PatronNationalID}}</td><td>Patron’s national identity number</td></tr>
<tr><td>{{LibraryName}}</td><td>The name of the branch, defined in organisational settings</td></tr>
<tr><td>{{BranchAddressLine1}}</td><td rowspan="9">The branch contact details, defined under Contact information in organisational settings</td></tr>
<tr><td>{{BranchAddressLine2}}</td></tr>
<tr><td>{{BranchPostcode}}</td></tr>
<tr><td>{{BranchCity}}</td></tr>
<tr><td>{{BranchCountry}}</td></tr>
<tr><td>{{BranchPhoneNumber}}</td></tr>
<tr><td>{{BranchEmail}}</td></tr>
<tr><td>{{BranchPaymentReceiver}}</td></tr>
<tr><td>{{BranchOrgNumber}}</td></tr>
<tr><td>{{BranchInfo1}}</td><td rowspan="2">The branch information texts, defined in organisational settings</td></tr>
<tr><td>{{BranchInfo2}}</td></tr>
<tr><td>{{AgreementName}}</td><td>The name of the agreement</td></tr>
<tr><td>{{AgreementVersion}}</td><td>The agreement version</td></tr>
<tr><td>{{AgreementVersionDate}}</td><td>The date the version of the agreement was saved</td></tr>
<tr><td>{{Date}}</td><td>The date the agreement was generated to be signed digitally or printed</td></tr>
</table>

Note:
The variables must be entered exactly as in the table.

You can preview the agreement and see what it will look like for a specific patron by entering the patron card number and clicking **Preview**.

See also: Digital agreements

Digital agreement rules

The digital agreement rules work similar to the other rules in Quria, but are only available for General terms and conditions agreements. Other agreements are handled for individual patrons.

You can define which agreement of type General terms and conditions that should be signed by patrons when they register to the library, and due to age group transition.

You can define the rules based on age group and patron category, and for each rule define if it is allowed for the patron to digitally sign the agreement in Arena and if a new agreement must be signed due to age group transition.

Note:
If some patrons such as staff or institutions do not have to sign an agreement, you have to spe-

Note:
cifically define all the combinations that must sign an agreement. There is no way to set up “negative” rules. The reason for this is to cover for the situation when all patrons must sign agreements (organisation setting on account level) and there should be no conflicting settings.

Agreement for new age group

You can make it mandatory for patrons to sign a new agreement when they enter a specific age group, for example when they turn 18. If the library has several age groups for children, there is usually no need to sign new agreements when the children move between the younger age groups.

Digital signing in Arena

Depending on local rules at the library or rules by the third-party signing supplier, you can define if digital signing in Arena is allowed. You may also want to allow digital signing in Arena only for specific patron categories.

Usage of guarantors

The library may want to establish that young patrons are assigned guarantors. One purpose is to be able to send notifications to guarantors rather than to young patrons. The guarantor may be made responsible for bills in cases of outstanding loans or damages.

The configuration of guarantors consists of one setting for the age group used for young patrons and a couple of rule settings.

Note:
You must mark the age group for young patrons with **Guarantor** for rule settings regarding guarantors to have an effect.

Enabling use of guarantors

A common way to handle young patrons at the library is to use different age groups, for example *Adult* and *Child*, where the age limit for children is set to for example *15*. Age groups are created under **Configuration**/**Patrons**/**Age groups**.

- To enable guarantor usage for an age group for young patrons, check **Guarantor** for this age group.

This setting enables that a guarantor field is displayed when creating a young patron. In this case, it is optional to enter a guarantor.

Making guarantor association mandatory

In addition to the guarantor setting for the age group, a rule has to be set if you want to make it mandatory to enter a guarantor for patrons from the selected age group. The guarantor cannot belong to the age group that requires a guarantor.

1. Go to the **Configuration** section in the main menu. The top menu **Settings** opens.
2. Under **Circulation and notifications**, click **Rules**.
3. Select the **Patron control** rule type and the **Guarantor required** rule.
4. Click **Add rule**.
5. Give the rule a descriptive name, such as *Guarantor required*. Consider if the correct organisation is already selected or if you need to change it, and if any other settings need to be made.
6. Select the age group used for young patrons.
7. Select **Yes** for **When above, then**, and click **Save**.

You find your new rule in the overview at the bottom of the window.

This setting makes it mandatory to either connect a young patron to an adult patron that is registered in Quria or to enter a guarantor name when creating a young patron.

When you edit a patron with a guarantor, you can remove the guarantor connection. In this case, a warning will be displayed for the account and in the **Scan items** window.

Addressing notifications to guarantors

In addition to the guarantor setting for the age group, rules can be set up in order to send notifications about reservations, overdue warnings or overdue reminders to the guarantor instead of to young patrons.

The example below describes modification of the **Enable overdue reminder** rule, but the configuration is the same for **Enable overdue warning** and **Enable reservation notice**, as well as for bills for overdue reminders/debt reminders.

1. Go to the **Configuration** section in the main menu. The top menu **Settings** opens.
2. Under **Circulation and notifications**, click **Rules**.
3. Select the **Circulation control** rule type and the **Enable overdue reminder** rule.
4. Select the existing rule in the rule overview at the bottom of the page, or add a new rule.
5. Under **Extra settings for the rule**, select **Guarantor** as recipient of notifications, and click **Save**.

Depending on how the guarantor has been entered for the young patron, there are three different options for how notifications will be sent to guarantors:

- The young patron is connected to an adult patron that is registered in Quria: notifications will be sent to the name and contact details registered for the guarantor.
- A guarantor name has been added: notifications will be sent to the name of the guarantor but to the contact details registered for the young patron.
- No guarantor is associated: notifications will be sent to the contact details registered for the young patron, but with the addition “To the guarantor of”.

See also: **Age group transition**, **Notifications to guarantors** and **Example - overdue notifications**

Age group transition

Age group transition occurs when patrons, because of age, no longer belong to their previous age group, for example a child that becomes an adult and no longer requires a guarantor, or a regular patron that becomes a senior citizen with different fees.

You can configure rules to make it possible to notify and/or block patrons when an age group transition occurs. These rules need to be configured on the Account level or higher.

For a child with a guarantor that because of age does no longer need a guarantor, the guarantor connection is discontinued without notifications.

A scheduled job needs to be run for the age group transition to take place.

See also: **Administration tools**

Example

Different rules are needed to configure age group transition in Quria. This example includes:

- Configuration of sending email: Email to be sent when age group transition occurs.
- Email text: Creating the text that the email contains.

- Patron block: Blocking patrons when age group transition occur.
- Scheduled job: Enabling the scheduled job that handles age group transition.

In this example, the library has two age groups: *Adult* and *Child*. The age limit for children is set to 15. Age groups are created under **Configuration**/**Patrons**/**Age groups**.

When a patron turns 15, we want to automatically send an email to inform the patron that they need to come to the library and sign a user agreement. We also want to prevent the patrons that just turned 15 from using any library services until they have signed the agreement.

Configuring an email to be sent when age group transition occurs

You can only create rules for the organization that you are signed in to.

1. Go to the **Configuration** section in the main menu.
2. Under **Circulation and notifications**, click **Rules**.
3. Select the **Patron control** rule type and the **Send email for age transition** rule.
4. Click **Add rule**.
5. Give the rule a descriptive name, such as *Transition to adult - email* and select a level in the organisation (Account level or higher).
6. Select *Adult* for **Age group**.
7. Select **Yes** for **When above, then**, and click **Save**.

You find your new rule in the overview at the bottom of the window.

Creating an email message text

1. Go to the **Configuration** section in the main menu.
2. Under **Circulation and notifications**, click **Message texts**.
3. Click **Add custom text**.
4. Select the **Age group transition** message type and **Email** as send method.
5. Select a level in your organisation, and the language you want to use.
   You see the predefined message that you can use as it is, or adapt if you want to. Variables can be used in the email.
6. Click **Save**.

Blocking patrons when age group transition occurs

1. Go to the **Configuration** section in the main menu.
2. Under **Circulation and notifications**, click **Rules**.
3. Select the **Patron control** rule type and the **Block patron after age transition** rule.
4. Click **Add rule**.
5. Give the rule a descriptive name, such as *Transition to adult- block* and select a level in the organisation (Account level or higher).
6. Select *Adult* for **Age group**.
7. Select **Yes** for **When above, then**, and click **Save**.

You find your new rule in the overview at the bottom of the window..

Setting up a scheduled job for age transition maintenance

1. Go to the **Configuration** section in the main menu and select the **Admin** tab.
2. Select **Manage scheduled jobs**.
3. Make sure that the **Patron age group transition handling** job is enabled.

The next time the job runs, it will check for any patrons that has turned 15 since the job was previously run (or the last 10 days if this is the first time you run the job). These patrons will now receive an email that they need to come to the library to sign an agreement. They are currently blocked from using the library services, and once they have come to the library and signed the agreement, you need to unblock them.

If rules have been set to require guarantors for children, guarantors will be removed from patrons when age transition occurs.

Digital agreements

In Quria, it is possible to demand that patrons sign agreements in order to use the library services. The agreements can be translated and used for different supported communication languages. The digital agreements functionality is an add-on module to Quria.

Activation of the Digital agreements module turns on functionality such as creating agreements, making special digital agreement rule settings, organisation settings, patron settings.

The permission Patrons/Delete signed agreements is required to delete signed agreements. The option is available from the context menu of the **Agreements** tab of the patron details window.

Two types of agreements are supported:

- General terms and conditions agreements
- Other agreements that can be customised for different purposes

General terms and conditions agreements

Activation of the general terms and conditions agreement triggers specific functionality in Quria and Arena, for example:

- Automatic connection to patron accounts when patrons are added
- Support for digital signing in Arena
- Possibility to connect patron accounts to new agreements using the **Age group transition** job

Signing General terms and conditions agreements

Patrons can sign General terms and conditions agreements in the following ways:

- In Arena, by signing in to a third-party signing provider
- In Quria, using a sign pad
- Manual signing of a printed agreement, to be verified and handled by staff

Other agreements

Other agreements can for example be used to regulate Open Library access or other special agreements that the library may want to handle. These agreements are added manually to patron accounts.

Signing other agreements

Patrons can sign other agreements in the following ways:

- In Quria, using a sign pad
- Manual signing of a printed agreement, to be verified and handled by staff

Agreements in Arena

When a patron signs in to Arena, the system checks if the patron has to sign a General terms and conditions agreement. Signature may be required based on one of the following scenarios:

- The patron has self-registered and not yet signed an agreement.
- All patrons need to sign an agreement due to an organisational setting in Quria.
- The patron now belongs to a new age group, and this has triggered that a new agreement must be signed.

If signing an agreement is required, a link to the agreement is displayed, and the patron can either sign digitally from Arena, provided that this option is enabled, or visit the library and sign manually. The agreement and its introductory text are both fetched from Quria.

See also: **Circulation and patrons**, **Digital agreement rules**, **Digital agreements**, **Sign pad configuration**

Circulation and notifications configuration

In the Configuration section, under Settings/Circulation and notifications, you can view and make settings related to circulation and notifications maintenance.

Rules

Select rule type, rule and in some cases level, and then select a level in the organisation to display the rules configured for that area. You can also add new rules and edit or delete existing rules.

See also: **Rules**

Self-service sorting rules

If the library uses sorting machines, items that have been checked in using self-service can be sorted automatically according configuration in Quria.

See also: **Setting up automatic sorting of self-service items**

Communication languages

You can add communication languages that are suitable for your patrons and then make sure that all message texts have corresponding translations. You can select one of the defined communication languages when adding or editing a patron, in order to let that patron receive messages in another language than the default language for the organisation.

You cannot delete a communication language that is in use in a message text.

> **Note:**
> Some system texts that are included in patron messages and sent to Arena are only available in Quria's supported user interface languages. To fetch these texts, you need to define the communication language in exactly the same format as the user interface languages when the communication language match one of the user interface languages, for example *nb_NO* for Norwegian Bokmål. If you define a communication language that is not supported, a few system texts in patron messages will appear in the default language for your Quria installation. See also: **User interface languages**

See also: **Message texts** and **The patron details window**

Notification contacts

The notification contacts are used for addressing various messages sent from Quria, so that the recipient of a message knows who sent the message. The list shows the notification contacts that have been defined. You can also add new contacts.

A default setting on system/account level must be defined, to be used if no other contacts have been defined. Contacts can be configured on different organisational levels, and different contacts can be configured for reservations and overdue reminders if different recipients should be notified depending on subject.

What sender information that will actually come in use depends on the e-mail- and SMS service providers and all settings might not be applicable.

Note:
SMS providers might have special restrictions regarding the content of Sender SMS. In Quria, you can either enter a phone number according to E.164 standard, or a maximum of 11 alphanumeric characters. These are the most common restrictions. But your SMS provider might have even more specific rules. It must be checked with your supplier what is possible to use if you are not sure about what is acceptable.

The Recipient email is used for an internal recipient in special cases, such as when someone at the library needs to act when a trapped reservation is deleted.

Message texts

Select a customised message text in the list to view or edit it, or click **Add custom text** to create a new text.

See also: **Message texts**

Replacement charges for billing

The list shows the replacement charges defined for the account. You can also add new replacement charges and delete the ones no longer of interest.

For each replacement charge it can be decided if the replacement charge should be used or if an existing item price should be used instead.

Setting up automatic sorting of self-service items

When items have been checked in using self-service machines, the returned items can be sorted automatically using sorting rules. Quria can be configured for automatic sorting under **Settings**/**Circulation and notifications**/**Self-service sorting rules**.

When you select an organisational level/workplace, you will see an overview of the sorting rules that apply to this level. If you start to add a rule set for a specific organisation/workplace you have to specify all needed rules for the rule set.

If no rules are set up for a specific organisation/workplace, you will get information about what rule set will be used for the selected organisation/workplace.

Note:
The bin name that you enter must correspond to an existing sorting bin in the machine.

Sorting can be configured on account, authority, branch and workplace level, and according to three different priorities:

1. Trapped items
2. Incoming ILL/Temporary items
3. General sorting rules

Trapped items

Click **Add rule** and specify pick-up branch for the item and the name of the bin.

Incoming ILL

Click the pen and determine if incoming ILL items should be sorted or not. If you choose to sort incoming ILL items, enter the name of the bin.

Temporary items

Click the pen and determine if temporary items should be sorted or not. If you choose to sort temporary items, enter the name of the bin.

General sorting rules

Click **Add rule** and select account, authority or branch and make settings related to item details. The settings are evaluated in the following order:

- Department (if branch is selected)
- Section
- Item shelf
- Main entry
- Item types
- Manifestation types
- Languages

Then specify the name of the bin.

In addition to detailed sorting rules, you should create a general sorting rule per setup that covers all items belonging to your own account. This will make sure that all items will get a bin when checked in using the self-service machine.

Notifications

When the notification rules are defined, notifications can be sent to a patron’s email address and/or phone number, for example when a reserved item is ready to be picked up, or when items are overdue. The notifications can also be printed.

The following notification rules can be defined:

- Reservation notice (a reserved item can be picked up at the library)
- Overdue warning (the item due date is in x days)
- Overdue reminder 1 (first reminder sent, y days after due date)
- Overdue reminder 2 (second reminder sent, z days after due date)
- Overdue reminder 3 (third reminder sent, xx days after due date)
- Overdue reminder 4 (fourth reminder sent, yy days after due date)
- Overdue reminder 5 (fifth reminder sent, zz days after due date)
- Bill (bill sent, xxx days after due date)
- Overdue reminder for reserved item (reminder sent directly on due date if the item is reserved by someone else)

- Age group transition (a message sent to patrons that because of age, no longer belong to their previous age group)
- Debt reminder 1
- Debt reminder 2
- Debt reminder 3
- Debt reminder 4
- Debt reminder bill

One notification message contains a patron's all items, if more than one item is overdue, ready to be picked up etc. You can set a fee for notification messages.

Overdue reminders for children are sent to the guarantor instead of to the child. Reservation notices and Overdue warnings are sent to the child. If no guarantor exists, all messages are sent to the child.

Note:
If a reminder on a preceding level is not sent for some reason (for example, a rule that prevents a certain patron category such as staff from being notified), the reminder on the next level will not be sent either.

See also: **Message texts**

Notification method

A patron can get notifications by print-out, email and/or SMS.

- If an email address has been registered for the patron, the notification will always be sent by email (together with an SMS or as the only message). If many email addresses has been registered for a patron, the notification will be sent to the primary email address.
- If the patron wants an SMS, you need to check the SMS box next to the phone number in patron details. If you add several phone numbers for which you check the SMS box, all the numbers will receive all SMS notifications.
- If there is no email address or phone number for sending text messages configured for a patron, notifications can be printed in order to send by post.
  See also: **Printing notifications**
- You can suppress some notification methods for overdue reminders by using the **Extra settings for the rule** that you find when configuring the **Circulation control**/**Enable overdue reminder** rules.

Default notification email address

The default notification email address is defined for the consortia, account, authority or branch. For some notifications, for example reservations and acquisitions, you can define a specific notification contact. The notification contact on the lowest possible organisational level is used.

1. Go to the **Configuration** section in the main menu.
2. Under **Circulation and notifications**, click **Notification contacts**.
3. Select **Default** for your organisation in the list to view existing settings.
4. To add a new contact for notifications, click on **Add contact** and select a contact type in the list.

Managing scheduled jobs (manually)

You can send notifications to patrons manually.

1. Go to the **Configuration** section in the main menu.
2. On the **Admin** tab, click **Manage scheduled jobs** under **Scheduled jobs**.
3. Click **Run now** for the **Generate overdue reminders** job.

Notifications are now sent for all items matching the notification rules.

You can edit a scheduled job by clicking on it in the list. You may, for example, want to adjust the time a scheduled job is run, or cancel it temporarily.

You can get an overview of all scheduled jobs that have been run by selecting **View status for executed jobs** under **Executed jobs**.

Notification information

You find information about sent overdue notifications:

- In the item details, the **Use of item** section.
- In the patron details, the **Notifications** tab.

Internal notifications and notifications to suppliers

In addition to notifications to patrons, you can also set up notifications for other purposes.

You need to add notification contact settings and verify that the message texts are set up according to your needs.

- Item on bill returned - to be sent internally when a billed item has been returned to the library and an external party might need to be contacted. The message is sent to the notification contact defined for overdue reminders. If this address is not defined, the default notification contact is used.
- Last item deleted - to be sent internally when the last item of a reserved manifestation has been deleted. The message is sent to the notification contact defined for reservations. If this address is not defined, the default notification contact is used.
- Acquisition order - to be sent to the supplier when ordering titles.
- Periodical reminder - to be sent to the supplier if an issue of a periodical has not been received.

See also: Notification contacts

Message texts

Quria includes a number of predefined messages texts that the system can send as notifications to patrons, such as overdue warnings, reminders and notices. The texts can be customised.

Notifications can be set up to be sent via SMS, email and mail, depending on the message type.

In addition to the notifications that are controlled by rules, the message type **Direct message** can be used to contact patrons individually from Patron data or to contact many patrons at one time using the bulk handling functionality.

See also: Notifications, Receipts and Handling many patrons at the same time

Variables

Message texts can include variables to automatically insert relevant information.

Note:
The variables must be entered exactly as in the tables below.

General

The general variables can be used in most messages to patrons.

Variable	Description	Comment
{{LibraryName}}	The name of the library	
{{SchoolName}}	The name of the school	Used for school branches
{{SchoolClass}}	The name of the class	
{{BranchInfoText1}}	Fetches branch information added under organisation settings	The two sets of branch information makes it possible to maintain and use different information for different purposes.
{{BranchInfoText2}}		
{{NotificationDate}}	The date of the notification	
{{NotificationFee}}	Notification fee	Used for messages that can include a fee, for example reservation notice and debt reminder
{{PatronFirstName}}	Patron's first name	
{{PatronLastName}}	Patron's surname	
{{PatronIdentifier}}	Patron's unique number	
{{PatronCard}}	Patron's card number	Prints the first active non-blocked card for the patron. If all cards are blocked/inactive, no card number is printed.
{{PatronTitle}}	Patron's title	
{{PatronAddress}}	Patron's address	The PatronAddressFormatted option is used to distribute the address on several rows, to for example make it fit in a window on an envelope, while PatronAddress is printed on a single line. The PatronAddressFormatted option can include c/o.
{{PatronAddressFormatted}}		
{{PatronNationalID}}	Patron's national ID number	Used for Debt reminder bill
{{GuarantorStart}}	Used for calculation of the Child variable (name of child with guarantor)	Only used when a patron is assigned guarantor for a child. Not used for Direct message, Age group transition or check-in/checkout/renewal receipts. See also: **Notifications to guarantors**
{{GuarantorEnd}}		
{{Child}}		

Item information

These variables are related to items and are mostly used for reservation messages and internal messages.

Variable	Description	Comment
{{Title}}	The title of the item	Used for Reservation notice, Item on bill returned, Last item deleted and Periodical reminder
{{CreatorName}}	The author of	Used for Reservation notice and Last item deleted

Variable	Description	Comment
	the item	
{{ItemBarcode}}	The barcode of the item	Used for Reservation notice and Last item deleted
{{ManifestationType}}	The manifestation type	Used for Last item deleted

Loans and reservations

These variables are used for reservation messages.

Variable	Description	Comment
{{LastPickupDate}}	Last day to pick up a reserved item	
{{PickupBranch}}	The branch where the reserved item can be fetched	
{{TrapNumber}}	The number a reservation gets while on the reservation shelf, waiting to be picked up	
{{ItemList}}	List of items that the patron checked in or out	
{{NoOfItems}}	Number of items that patron checked in or out	

Debts and bills

These variables are used for different reminders and bills.

Variable	Description	Comment
{{NumberOfItems}}	Number of patron’s overdue items	Used for Overdue warning and Overdue reminder level 1-5
{{BillNumber}}	Bill number	Used for Bill and Item on bill returned
{{ItemListBills}}	The items that are listed on a bill, including replacement charge per item and rows for administration fee and total amount.	Used for Bill and Item on bill returned
{{DebtList}}	List of items included in patron’s debt	Used for Debt reminder level 1-4
{{DebtListBills}}	List of items with debts	Used for Debt reminder level 1-4 and Debt reminder bill
{{LastPaymentDate}}	The last payment date for bills, according to the setting **Number of payment days for bill** (set on authority level).	Used for Bill

Acquisitions and periodicals

The following variables can be used when using the Acquisition order and Periodical reminder messages to communicate with suppliers:

Variable	Description
{{OrderDate}}	Order date
{{OrderList}}	List of items to order
{{OrderNumber}}	Order number
{{SupplierName}}	Name of supplier
{{SupplierAddressFormatted}}	Supplier address, distributed on several rows
{{DeliveryAddressFormatted}}	Delivery address, distributed on several rows
{{InvoicingAddressFormatted}}	Invoicing address, distributed on several rows
{{Issue}}	Issue of a periodical
{{ArticleNo}}	Article number of a periodical

Variable	Description
{{CustNo}}	The customer number of the library

Default message texts and customised texts

The default message texts in Quria are in English, and can be used as they are, or serve as a basis for customised texts.

You work with message texts by selecting **Configuration** in the main menu, and then **Settings**/**Circulation and notifications**/**Message texts**.

Adding, editing and deleting customised texts

You can add customised texts for different message types, for different send methods, on different organisational levels and for different languages by clicking **Add custom text** and making selections in the dropdowns. You will see the content of your own text, and if you want to, you can compare it with the base text (a predefined message text, the text on the level above, or the text defined for the local language on the same level) by expanding it at the bottom of the dialog. You can copy the base text to have something to start from, or type the entire text yourself.

The message editor includes some handy tools that can be used to adapt the layout of the text to, for example, fit in a window of an envelope.

The texts used for patron notifications are the ones defined in the tenant language on given organisation or higher. If no such texts exist, the predefined messages are used.

You can edit or delete an existing text by clicking the pen or the trash can in the **Handle message text** dialog. If you delete a text, the text a level up in the hierarchy is used.

Notifications to guarantors

Rules can be set up in order to send notifications about reservations, overdue warnings or overdue reminders to the guarantor instead of to young patrons.

> **Note:**
> Sending notifications to guarantors only works if the guarantor is registered as patron in Quria and is connected to the young patron using the function **Patron connections**.

The following variables can be used when creating notifications to guarantors: GuarantorStart, GuarantorEnd and Child.

Example

“Dear {{PatronFirstName}} {{PatronLastName}} {{GuarantorStart}} (guarantor for {{Child}}) {{GuarantorEnd}}…”

For a child patron named Lisa Green with a guarantor named Tom Brown, the following result is generated:

“Dear Tom Brown (guarantor for Lisa Green)…”

Debt reminders

If a patron has not paid outstanding fees over a set amount, it is possible to define debt reminders after a certain time. A maximum of four debt reminders, that may or may not include an administrative fee, can be generated before a bill is created.

> **Note:**
> Any unpaid membership fees will not be included in Quria’s debt reminders. These fees need to be handled separately.

Only one series of debt reminders can be ongoing at the same time for one patron per authority. If a patron pays part of a debt so that the total debt amount is less than the set amount that triggers debt reminders, these reminders will not be sent out any more.

Any administrative fees for debt reminders will be added to the total sum of the ongoing debt reminder.

Debt reminders rules can only be set up on account or authority level. (Note that if set at account level, the notifications will still be done on an authority basis, meaning there will be different debt reminders sent per authority if the patron has debts in different authorities.)

The following needs to be defined to support debt reminders, and is described in detail below:

- Enabling usage of debt reminders
- The minimum debt amount to trigger debt reminders
- If there is an administrative fee for debt reminders
- When debt reminders should be sent out, including send method
- Adding message texts for debt reminders
- If patrons with debt reminders should be blocked in Quria
- Setting up a scheduled job for debt reminders
- Defining the maximum overdue period for debt reminders

Enabling debt reminders

You set up usage of debt reminders under **Configuration**/**Settings**/**Circulation and notifications**/**Rules**.

1. Select **Circulation control**/**Enable debt reminder**.
2. Select **Debt reminder 1**.
3. Click **Add rule**.
4. Enter a description of the rule and define the conditions. Mandatory fields are marked with an asterisk.
5. Select **Yes** for **When above, then**.
6. Determine if notification via email or print-out should be prevented and if the patron or the guarantor (if applicable) should be notified.
7. Click **Save**.

Continue adding debt reminders 2, 3 and 4, and bill, if you want to use all these levels.

Defining minimum debt amount

The minimum total amount to trigger debt reminder is set up under **Configuration**/**Settings**/**Circulation and notifications**/**Rules**.

1. Select **Counts**/**Minimum total amount for debt reminder**.
2. Click **Add rule**.
3. Enter a description of the rule and define the conditions. Mandatory fields are marked with an asterisk.
4. Define the minimum total debt amount for a debt reminder to be generated.
5. Click **Save**.

Defining an administrative fee for debt reminder

The administrative fee is set up under **Configuration**/**Settings**/**Circulation and notifications**/**Rules**.

1. Select **General charges**/**Debt reminder fee**/**Debt reminder 1**.
2. Click **Add rule**.
3. Enter a description of the rule and define the conditions for the fee. Mandatory fields are marked with an asterisk.
4. Define the debt reminder fee.
5. Click **Save**.

Continue adding administrative fees for debt reminders 2, 3 and 4, and bill, if you want to use all these levels.

Defining time period for debt reminder

1. Select **Periods**/**Debt reminder period**/**Debt reminder 1**.
2. Click **Add rule**.
3. Enter a description and define the conditions for the rule. Mandatory fields are marked with an asterisk.
4. Define the number of days after which the first reminder should be sent.
5. Click **Save**.

Debt reminder 1 will only be sent if the debt amount is reached and if no other series of debt reminders has been initiated.

Continue adding time periods for debt reminders 2, 3 and 4, and bill, if you want to use all these levels. The number of days equals days that have passed since the last reminder was sent plus the total number of days for the previous reminder levels, for example: if reminder 1 is sent after 100 days and reminder 2 should be sent after additional 28 days, then reminder 2 will be sent after 128 days.

Message texts for debt reminders and debt reminder bills

Message texts need to be created to be used for debt reminders and these are defined on authority or account level. They are set up under **Configuration**/**Settings**/**Circulation and notifications**/**Message texts**.

1. Select **Debt reminder** (including level) and **Debt reminder bill** for Message type, **Email** or **Print-out** for send method, the correct level in the organisation and the language for the reminders.
   You can click an existing message text in the list to verify that the text is accurate.
2. To add a custom text, click **Add custom text**.

You find the debt reminders/bills for printout under **Patron**/**Notifications**.

1. Select **Debt reminder** (including level)/**Debt reminder bill** and the correct branch.
2. Click **Print** for each of the reminders/bills that you want to print.

Blocking patrons with debt reminders

You can block patrons with debts reminders from making reservations and checking out items under **Configuration**/**Settings**/**Circulation and notifications**/**Rules**.

1. Select **Patron control**/**Debt reminder block**/**Debt reminder** or **Bill**.
2. Click **Add rule**.
3. Enter a description and define the conditions for the rule. Mandatory fields are marked with an asterisk.
4. Select **Yes** to block a patron with a debt reminder/bill from reserving and checking out items.
5. Add a message if you want to.
6. Click **Save**.

Setting up a scheduled jobs to generate debt reminders

Debt reminders and debt bills are generated using a scheduled job.

See also: **Notifications**

Defining a maximum overdue period for debts

By default, overdue reminders older than 730 days are excluded from debt reminders. You can update this setting under System settings.

See also: **System settings**

Billing of lost items

If a patron has not returned items to the library after overdue reminders, it is possible to set up for bills to be sent out.

When a bill is sent out for an item, this item will be excluded from the public portal and it can no longer be reserved or renewed.

The following needs to be defined to support billing, and is described in detail below:

- Replacement charges and possibly an administrative fee
- When a bill should be sent out
- If an item on bill may be checked in or not
- If bills are to be printed and sent to patrons or handled via integration to the financial system
- If patrons with bills should be blocked in Quria
- Setting up a scheduled job for billing

See also: **Handling bills**

Defining replacement charges

Replacement charges for items are set up under **Configuration**/**Settings**/**Circulation and notifications**/**Replacement charges for billing**.

1. Click **Add replacement charge**.
2. Enter a description of the charge and define the conditions for the charge. Mandatory fields are marked with an asterisk.
3. Define a replacement charge, and select if this charge should always be used (**Do not use item price**) or if the item price should be used. The item price is retrieved from the unit price when the item was ordered. If a unit price cannot be found, the replacement charge is used.
4. Click **Save**.

Defining an administrative fee for bills

The administrative fee is set up under **Configuration**/**Settings**/**Circulation and notifications**/**Rules**.

1. Select **General charges**/**Overdue reminder fee**/**Bill**.
2. Click **Add rule**.
3. Enter a description of the rule and define the conditions for the fee. Mandatory fields are marked with an asterisk.
4. Define the overdue reminder fee.
5. Click **Save**.

Defining when a bill should be sent out

Take the time periods defined for the overdue reminders into account when defining when bills should be generated.

The time period for sending out a bill is set up under **Configuration**/**Settings**/**Circulation and notifications**/**Rules**.

1. Select **Periods**/**Overdue reminder**/**Bill**.
2. Click **Add rule**.
3. Enter a description and define the conditions for the rule. Mandatory fields are marked with an asterisk.
4. Define the number of days.
5. Click **Save**.

Defining if an item on bill may be checked in

If billed items are not accepted for check-in, it will not be possible to force a check-in.

If billed items are allowed for check-in, normal check-in routines apply for transit, overdue fees etc, but the amount due for the returned item is deducted from the patron's bill (excluding the administrative fee). An email can be generated and sent to the **Overdue** notification contact using the message text **Item on bill returned**, provided that the notification contact is defined. If no **Overdue** notification contact is defined, the **Default** notification contact is used.

Whether a billed item may be checked in or not is set up under **Configuration**/**Settings**/**Circulation and notifications**/**Rules**.

1. Select **Circulation control**/**Check-in of items with bill** and **Self-service control**/**Check-in of items with bill** respectively.
2. Click **Add rule**.
3. Enter a description and define the conditions for the rule. Mandatory fields are marked with an asterisk.
4. Select **Yes** to allow and **No** to deny check-in of a billed item.
5. Click **Save**.

Printing bills

You decide to handle bills at the library under **Configuration**/**Settings**/**Organisations**/**Organisation settings**.

1. Make sure to select consortium, account or authority level under Organisation.
2. Click **Add setting**.
3. Under Circulation, check **Bills can be paid at the library**.
4. Click **Save**.

A message text needs to be created to be used for printout of bills. It is set up under **Configuration**/**Settings**/**Circulation and notifications**/**Message texts**.

1. Select **Bills** for Message type, **Print-out** for Send method, the correct level in the organisation and the language for the bills.
   You can click an existing message text in the list to verify that the text is accurate.
2. To add a custom text, click **Add custom text**.

You find the bills for printout under **Patron**/**Notifications**.

1. Select **Bills** and the correct branch.
2. Click **Print** for each of the bills that you want to print.

Integration to financial system for billing

You define the integration to the financial system under **Configuration**/**Settings**/**Peripherals and integration**/**Integration settings**. You add the settings one by one.

1. Make sure to select the authority level under Organisation.
2. Click **Add setting**.
3. For each setting, add the accurate key and value for your provider of financial system. Mandatory fields are marked with an asterisk.
4. Click **Save**.

See also: **Integration with financial systems**

Blocking patrons with bills

You can block patrons with bills from making reservations and checking out items under **Configuration**/**Settings**/**Circulation and notifications**/**Rules**.

1. Select **Patron control**/**Notification block**/**Bill**.
2. Click **Add rule**.
3. Enter a description and define the conditions for the rule. Mandatory fields are marked with an asterisk.
4. Select **Yes** to block and **No** to allow a patron with a bill to reserve and check out items.
5. Add a message if you want to.
6. Click **Save**.

Setting up a scheduled jobs to generate bills

Bills are generated along with other notifications through a scheduled job.

See also: **Notifications**

Reservation cooperation

It is possible to cooperate around reservations within an organisation for different reasons, such as:

- Serving patrons as soon as possible
- Avoiding unnecessary transportation
- Handling a mix of library types such as school libraries and public libraries

Reservation cooperation is configured per pick-up branch. It is possible to define that for example certain item types are to be excluded from the reservation cooperation.

If a branch has not configured levels for reservation cooperation, then all items regardless of home branch are eligible for trapping.

Note:
Reservation rules are superior to setup of reservation cooperation.

Reservation levels

Reservations levels are used to define priority between branches or groups of branches. Your own branch is always part of level 1. Titles that belong to level 1 are trapped first – the levels below are only used if the title cannot be found at level 1.

A maximum of 9 levels can be defined for each branch.

Items at branches that are not included in any reservation cooperation level for a pick-up branch will never trap reservations for that pick-up branch.

Example: For reservations with pick-up branch A, you have defined that items belonging to branch A and branch B are included in the cooperation. This means that items that belong to branch C will never be trapped for reservations with pick-up branch A.

Configuring reservation cooperation

1. Go to the **Configuration** section in the main menu.
2. Under **Circulation and notifications**, click **Reservation cooperation**.
3. Select the branch you want to configure and click **Add settings for this branch**.
4. Click **Edit** for Level 1 and add any other branches from which holdings should trap reservations as the first option.
   You see that the branch you are configuring is already part of Level 1.
5. Click **Edit** for Level 2 and add the branches from which holdings should trap reservations if the title cannot be found at Level 1.
6. Continue to add up to a total of maximum 9 levels for the reservation cooperation.

Overriding reservation cooperation levels

You can set aside the levels in the reservation cooperation and trap items at any branch included in the reservation cooperation. For example, if a reservation has been outstanding for a certain amount of time it can be escalated by checking **Override cooperation levels** or **Trap at any branch** (handled manually). This function is activated via a special permission for Collections.

Reservations in Arena

If reservation cooperation has been configured, only titles with items available in the levels set for this branch can be reserved in Arena.

Acquisitions and periodicals

In the Configuration section, under Acquisitions and periodicals, you can view and make settings related to these areas.

Budgets

The list shows the budgets that have been created. You can also add new budgets, edit budgets and delete budgets no longer of interest.

Adding a budget

Add the budget on the organisational level where it should be possible to use it. Budgets can be used by all levels below this, which can be useful for example when creating a budget for project grants.

1. Click **Add budget**.
2. Fill in the fields. Mandatory fields are marked with an asterisk.
3. Add one or several budget periods, and if you want to, a warning level. The warning level is used in the budget follow-up to indicate when you have reached the set level for the budget period.
4. Click **Save**.

Currencies

You can add currencies to get an estimation of the cost when making purchases from international suppliers. There is no connection to currency rates used by financial institutes, and you need to maintain the currencies yourself.

If you want to use the currency functionality in Quria, you should add the default currency (the currency used in your location) with the exchange rate 1. Then add the other currencies with their exchange rates in relation to the default currency. A currency with exchange rate 0 will be disregarded.

Example

In a Swedish installation where you want to be able to make some purchases in euro, the Swedish SEK currency is set to **Exchange rate** *1*. In the same installation, the euro EUR is set to **Exchange rate** *10.34* since 1 euro currently costs 10.34 SEK.

Suppliers

This is where you handle suppliers; both suppliers of manual orders of items, and the suppliers of the orders that automatically go in to Quria. A supplier is also mandatory when creating a periodical subscription.

There is a large number of settings, of which only a few are mandatory. You can for example add a communication language and currency if these are different from the system default settings (useful if you make orders from abroad). You can add a discount if this has been agreed upon. Note that the **Website** setting for the contact information must begin with http:// (or https://) to become clickable.

The contact persons that you add are just a way to keep track of these - not used in the system.

Customer numbers need to be added if orders are imported from suppliers. For EKZ, both username and password are mandatory as well as the organisation number *ekz*.

If no information about organisation, department and budget is included in the imported data, the values registered per customer number will be used as default values.

Delivery and invoice addresses

You can set up addresses for delivery and invoicing, to for example get deliveries to the library but invoices to the financial department located at another address. The delivery and invoice addresses that you add here, are available for selection on different levels under **Organisations**/**Organisation settings**.

VAT rates

You can enter different VAT rates to be used for different kinds of acquisitions. These are all included in the budget transactions in the system for future use, however there is no available follow-up at the moment.

Peripherals and integration configuration

In the Configuration section, under Settings/Peripherals and integration, you can view and make settings related to peripheral equipment and integration.

Item numbers

The format of item numbers is set at initial installation of the system.

Print settings

The system includes default settings for printing of bibliographic labels, spine labels, receipts and reservation slips. The default settings will be used unless local print settings have been created.

To create a local print settings instead of using the default simplified layouts, click **Add local print setting** and select a print type. Most of the local print settings support using a set of variables to adapt the content. You can also set a suitable label height and width, and make different layout settings.

Select an organisational level in the dropdown to see which print settings have already been defined on different levels.

Labels

1. Define the default width and height.
2. If you want to, you can limit the number for characters for the title, creator, shelf and main entry, and also select to print the main entry in capitals if that suits you.
3. Under **Layout**, add the content to include on the label and make layout settings in the editor. You can enter a combination of text and variables.

These variables can be used to customize bibliographical labels and spine labels:

Variable	Description
{{BranchShortName}}	The branch short name, defined in organisational settings
{{BranchCode}}	The branch code, defined in organisational settings
{{DepartmentName}}	The department name, defined in department settings
{{DepartmentCode}}	The department code, defined in department settings
{{SectionName}}	The section name, defined in section settings
{{SectionCode}}	The section code, defined in section settings
{{ItemShelf}}	The item shelf, defined in the item details
{{Creator}}	The creator of the item
{{Title}}	The title of the item
{{MainEntry}}	The main entry based on creator and manifestation title information
{{Barcode}}	The generated image of the barcode (Code 128)
{{ItemNumber}}	The barcode characters
{{ISBN}}	The ISBN of the item
{{ManifestationType}}	The manifestation type
{{Year}}	The year of the main publication event

Note:
The variables must be entered exactly as in the table.

When you have created your layout, you can scan or enter any item number in the box and print the label to see that you get the expected result.

Reservation slips

1. Define the default width.
2. Select if name, patron category and/or school class should be included on the printout. Only patron categories that have been marked as possible to include on reservation slips will be included when printing.

Receipts

You can define separate print type settings for check out/renewal receipts, check-in receipts, payment receipts and receipts for removal of debts.

1. Select print type, communication language and default width.
2. Enter an item number for testing, if you want to.
3. Under **Layout**, add the content to include on the label and make layout settings in the editor. You can enter a combination of text and variables.

These variables can be used to customise receipts:

<table>
<tr><th>Variable</th><th>Description</th></tr>
<tr><td>{{LibraryName}}</td><td>The name of the branch, defined in organisational settings</td></tr>
<tr><td>{{BranchAddressLine1}}</td><td rowspan="9">The branch contact details, defined under Contact information in organisational settings</td></tr>
<tr><td>{{BranchAddressLine2}}</td></tr>
<tr><td>{{BranchPostcode}}</td></tr>
<tr><td>{{BranchCity}}</td></tr>
<tr><td>{{BranchCountry}}</td></tr>
<tr><td>{{BranchPhoneNumber}}</td></tr>
<tr><td>{{BranchEmail}}</td></tr>
<tr><td>{{BranchPaymentReceiver}}</td></tr>
<tr><td>{{BranchOrgNumber}}</td></tr>
<tr><td>{{BranchInfo1}}</td><td rowspan="2">The branch information texts, defined in organisational settings</td></tr>
<tr><td>{{BranchInfo2}}</td></tr>
<tr><td>{{ItemList}}</td><td>The items included on the receipt. The content varies depending on the receipt type.</td></tr>
<tr><td>{{NumberOfItems}}</td><td>The number of items included on the receipt.</td></tr>
<tr><td>{{Date}}</td><td>The date</td></tr>
</table>

Note:
The variables must be entered exactly as in the table.

When you have created your layout, you can scan or enter your test item number in the box and preview the receipt to see that you get the expected result. The print setting will be used as soon as it is saved, so it is important to preview by entering a test item number, and not to press the **Enter** key until you are done.

Note:
For the receipt for removal of debts, there is no default receipt defined in the system. If you do not configure a print setting for this receipt type, it will not be possible to print a receipt when a debt is removed.

Self-service error messages

Select branch, workplace and type in the dropdowns to show the error messages that can be displayed on self-service machines. You can also add new error messages.

Integration settings

Click **Add setting** to create an integration with an external system. In the window that opens next, select organisation and integration to display the parameters for that specific integration. The values to fill in must be received from the integration party.

Local device configuration

You set up the connection between the self-service machines and Quria by adding a local device configuration.

Click **Add local device configuration** and fill in the settings.

Setting	Description
Local device user ID	The user ID sent from the self-service machine
Local device password	The password sent from the self-service machine
Allow patron access without PIN code	Check this box if you want to allow patrons without PIN code to be accepted.
Use strict XML	If this box is unchecked, the characters &, <, >, “ and ' will be sent in the SIP2 message to the self-service machine as is if they appear in the message - for example in a title. Newer self-service machines might not be able parse the SIP2 XML message in that case. If the box is checked, the characters &, <, >, “ and ' will be escaped (& will be & etc.) in the SIP2 XML message but will require the self-service machine to unescape the characters before printing them on the screen or on receipts. Note that because of caching, it can take up to an hour before checking/unchecking the box has an effect.
User	The Quria system user that should be connected to all transactions from the self-service machine. See also: Adding a system user

Printer setup

Printer setup is needed for each workplace that should connect to a printer. The setup differs depending on printer.

Star TSP100 printer

Drivers

1. Install the printer device drivers that you find at starmicronics.com/support/manual.aspx?printerCode=TSP100.
2. Go to the tab **Drivers** and click the recommended driver.
3. Click the **Full** version driver to download. Unzip the file, and go to **Windows** > **Installer** > **Setup_x64** if you have a 64 bit computer (most common), otherwise use the setup file.

4. Double-click and install the driver. If the driver does not show up after completing these steps, try rebooting the computer, or reinstall the driver.

In Windows

1. Open the **Control panel**, go to **Devices and Printers** and find the printer.
2. Open the printer properties.
3. On the **Device settings** tab set the following:
   FRICTION: **72mm x Receipt**
   Paper Type: **Receipt**
   FRICTION: **72mm x Receipt**
   Page Cut Type: **Partial Cut**
   Document Cut Type: **Partial Cut**
4. On the **General** tab click **Preferences...**.
5. On the **Layout** tab click **Advanced** and make sure **Paper Size** is **72mm x Receipt**.
6. On the **Paper/Quality** tab set **Paper Source** to **FRICTION**.
7. Click **OK** to save changes.

When printing a slip, check that the paper size in the printer options in Chrome is also set to **72mm x Receipt**. The print preview will show a very long slip but it will print-out correctly.

Zebra GK420t

1. Install the printer device drivers.
2. Find an item in Quria and open the item details.
3. Click on **Print bibliographic label** or **Print spine label**.
4. Select printer ZDesignerGK420t.
5. In the Chrome printer dialogue **More settings**:
   Set **Layout** to **Portrait**.
   Set **Paper size** to **User defined**.
   Set **Margins** to **None**.
   Set **Scale** to **100**.
   Uncheck the option **Headers and Footers** (if checked, you will get urls in the footer of the receipts).

Headers and footers

Headers and footers that include urls, date, page number etc may be displayed on printouts by default, depending on which web browser you are using.

The default setting in Microsoft Edge prints without headers and footers.

Google Chrome

To avoid printing headers and footers in Google Chrome:

1. In the **Print** dialog, displayed just before the printout is created, select **More settings**.
2. Under **Options**, uncheck **Headers and footers**.

Mozilla Firefox

To avoid printing headers and footers in Mozilla Firefox:

1. In the address field type *about:config* and accept the warning.
2. Search for *header* and *footer* respectively, and clear the default values for the following variables:
    - print.print_headercenter
    - print.print_headerleft
    - print.print_headerright
    - print.print_footercenter
    - print.print_footerright
    - print.print_footerleft
3. Clear the corresponding variables, in the same dialog, for your installed printers.

RFID configuration

When the RFID equipment has been installed, this is how you configure it in Quria.

1. Go to the **Configuration** section in the main menu.
2. Under **Organisations**, click **Workplaces**.
3. Select authority and branch from the dropdown menus.
4. Click the workplace name and enter the following parameters depending on RFID equipment type.

RFID equipment type	RFID equipment hostname	RFID equipment port
Bibliotheka DK	rfid.bibliotheca.dk	7001
EasyCheck	localhost	10004
Lyngsoe Systems (previously P.V. Supa)	localhost	7002

5. Click **Save**.

Editing the RFID alarm status

When an RFID tag is put on the RFID reader, a note is displayed if its alarm status does not correspond to the item status in the Quria database:

- Item status checked out: alarm should be off
- Item status checked in: alarm should be on

If the statuses do not match, you can activate or deactivate the alarm in the context menu of the item. These options are not available if the statuses match.

Scanner configuration

Scanners that should read Quria barcodes need to be Plessey enabled.

Scanners purchased from Axiell are pre-configured and ready to use. Please contact your scanner supplier if you need assistance with programming your scanner.

Sign pad configuration

A sign pad captures a handwritten signature, to be used when patrons sign digital agreements for library usage.

Signature Pad signotec Sigma

The Signature Pad signotec Sigma needs to be installed using **downloads.signotec.com/signoPAD-API_Web/signotec_signoPAD-API_Web_3.3.1.exe** or similar software here: **signotec.com/software/integration-sdk-api-/signopad-api-web**

Note:
The software for signotec must be installed using all listen hosts options. This qualified host name uses WSS (WebSocket Secure).

After installing the software, connect the USB cable, and configure the workplace with the settings in the table below.

Integration key	Mapping/description
Sign pad equipment hostname	local.signotecwebsocket.de
Sign pad equipment port	49494
Sign pad equipment type	Signotec

See also: **signotec product description** and **Digital agreements**

Integration settings

A more specific integration setting will be given higher priority than a more general integration setting, in relation to the organisational hierarchy. This means that if there is a setting for a branch that is different from the authority or account, the branch setting will overrule. Some integration settings can only be made on a particular organisation level, described for each integration below.

BaseBibliotek

These settings are currently in use only for Norwegian customers.

Libris ILL

These settings are currently in use only for Swedish customers. See also: **Quria online help in Swedish**

Metadata Update Service

These settings are currently in use only for Swedish customers. See also: **Quria online help in Swedish**

SBD

The SBD integration makes it possible to get files from SBD.bibliotheksservice ag based on EAN or delivery note number. The integration keys below are used in Quria.

Integration key	Mapping/description
customer	Customer number
username	User name
password	Password

SEPA

Single Euro Payments Area (SEPA) is used for bank transfers denominated in Euro. The integration keys below are used in Quria.

Integration key	Mapping/description
BIC	The library bank account BIC. Configuration on authority level in Quria.

Integration key	Mapping/description
IBAN	The library bank account IBAN. Configuration on authority level in Quria.
accountName	The library name (max 70 characters). Configuration on authority level in Quria.
initiatingParty	Indicates from where the file has come. Configuration on authority level in Quria.
patronCardLength	Used as part of setting up the PaymentId for the Direct Debit Transfer information. PaymentId consists of the organisation code and the patron card number in the format *organisation code / patron card number*. The patron card number is padded with zeros to the appropriate length. Should be set to 0 if no padding is wanted. Configuration on authority level in Quria.
paymentId	Identifies the payment collector (the library). This parameter is also known as Creditor Identification Number. Configuration on authority level in Quria.
privateId	Used as part of the Creditor Scheme Id. Configuration on authority level in Quria.

Integration with financial systems

Visma

Quria can communicate with Visma for exchanging information for bills. Settings for Visma are added on account or authority level. The integration keys below are used in Quria.

Integration key	Mapping/description
service.userName	User name for the Visma service
externalSystem	If this is set, then integration is enabled for Visma. Configuration on account level in Quria.
division	Configuration on account level in Quria. (can only be numeric)
commodityNumber.billAdminFee	The account number for handling of library bills and credits in the library's financial system. Configuration on account level in Quria. (can only be numeric)
profile	If set, used for orderLine.profile. If this is not to be used, then enter n/a to send to Visma as blank.
orderRef	If set, used for orderLine.orderRef. If this is not to be used, then enter n/a to send to Visma as blank.
service.url	URL for the Visma service.
service.password	Password for the Visma service
company	Configuration on account level in Quria. (can only be numeric)
principalNumber	Configuration on account level in Quria. (can only be numeric)
commodityNumber.billReplacementCharge	The account number for handling of library bills and credits in the library's financial system. Configuration on account level in Quria. (can only be numeric)
yourRef	If set, used for orderLine.yourRef. If this is not to be used, then enter n/a to send to Visma as blank.

Agresso

Quria can communicate with Agresso for exchanging information for bills. Settings for Agresso are added on account or authority level.

The communication goes from Quria to Agresso only. The integration keys below are used in Quria.

Integration key	Mapping/description
integration.agresso.enabled	Defines if the Agresso service should be enabled.
integration.agresso.service.userName	User name for the Agresso service
integration.agresso.producer	Sender system, e.g. Vigilo, Impleo. Set to Axiell.
integration.agresso.responsible	Responsible for the invoice, e.g. AD username. (max 3 characters). Configuration on authority level in Quria. (noting max length).
integration.agresso.invoice.responsibilityNumber	Responsibility number (max 8 characters). Configuration on authority level in Quria.
integration.agresso.invoice.accountNumber	Account number (max 8 characters).
integration.agresso.invoice.ansvarsnr	Responsibility number (max 100 characters)
integration.agresso.invoice.articleNumberReplacementFee	Article number of replacement charge. Article description includes barcode of item.
integration.agresso.service.authenticationUrl	URL for the Agresso authentication server
integration.agresso.service.url	URL for the Agresso service
integration.agresso.service.password	Password for the Agresso service
integration.agresso.client	Client code, e.g. DK (must be 2 characters). Configuration on authority level in Quria.
integration.agresso.billNumber	Used for generating bill numbers in a series defined by Agresso.
integration.agresso.invoice.serviceNumber	Service number (max 8 characters). Configuration on authority level in Quria.
integration.agresso.invoice.dimvalue1	Accounting dimension 1 (max 12 characters) Configuration on authority level in Quria.
integration.agresso.invoice.articleNumberAdminFee	Article number of admin fee. Article description includes bill number.

Map

In agreement with a map provider, you can display maps in Arena by entering the map provider-specific URL:s for the branches that have maps. The setting can be added on any organisational level.

A map URL consists of two parts:

1. The initial part is specific for each map supplier and customer/map. That part ends when the first ”?” is reached and is marked in bold in the example below.
2. The second part starts with the first ”?” and is built up with a set of parameters that enables the map supplier to give correct map positions. Also this part is map supplier-specific, but is always the same for a specific supplier regardless if you have multiple maps for for example different branches.

Example URL:

https://provider.com/xxx/123*?Lang=sv&encoding=utf-8&unit_code={{UnitCode}}&locale={{Locale}}&param0={{DepartmentCode}}&param1={{SectionCode}}&param2={{FirstCharacterAuthorOrTitle}}&shelf={{ItemShelfmark}}&text={{AuthorAndTitle}}*

For Wagner guide, the second part should look like this: *?Lang=sv&encoding=utf-8&unit_code={{UnitCode}}&locale={{Locale}}&param0={{DepartmentCode}}&param1={{SectionCode}}&param2={{FirstCharacterAuthorOrTitle}}&shelf={{ItemShelfmark}}&text={{AuthorAndTitle}}*

Integration key	Mapping/description
mapURL	The map provider-specific URL according to description above

Events configuration

In the Configuration section, under Settings/Events, you can view and make settings for target audiences, locations and rooms for events.

For locations and rooms, you add the locations first, and then, rooms for each location.

The target audiences, locations and rooms you add will be available for selection when creating an event.

Administration tools

Under the **Admin** tab in the **Configuration** section, you find tools that facilitate administration of your Quria installation.

Scheduled jobs

Different scheduled jobs are set up for the Quria system at installation, and you can run the jobs manually at any time. You can also edit a scheduled job by clicking it in the list. You may for example want to temporarily disable a job or change the time for the next occurrence of it.

You also find a status overview of executed jobs. If you expand the rows you get more information such as run time and relevant statistics for the job.

Note:
It is recommended to start different scheduled jobs with some time apart (at least 10 minutes) rather than starting several jobs at the exact same time.

Overdue warnings, reminders and bills

You can set up the frequency of generation of overdue items, with separate jobs for warnings, reminders and bills, and debt reminders. Make sure to trigger these jobs during daytime, to avoid disturbing patrons with email or SMS notifications. You can also fetch invoice updates from an external financial system.

See also: **Notifications**, **Billing of lost items** and **Debt reminders**

For integration with Visma, you must run one job to check for bills that have been successfully sent to Visma and get the latest invoice information, and another job to look for outstanding bills that have a Visma invoice number, and check their payment status. If an invoice has been paid, it will be noted as **External payment** in the patron details. The routines for this need to be set up by the library.

Memberships

You can set up the frequency of update of memberships, with separate jobs for memberships based on bank payments and based on manual payments. The **Update memberships based on manual payments** job should not be used in combination with the scheduled job for debt reminders, as this would result in debts for membership renewals that might be of no interest to the patrons, and patrons would be reminded of debts that they have not caused.

See also: **Patron membership**

URL checker

This tool is used to verify the availability of internet resources by checking that URLs in manifestations are valid. It is recommended to run this job during night time.

Periodicals reminders

You can set up reminders for the case when periodical issues have not been received according to the publication plan.

See also: Working with periodicals

Patron age group transition

You can set up handling of patron age group transition.

See also: Age group transition

Maintenance of catalogue records

You can clear any unused references to creators, subjects and classifications by running the **Discard unused metadata** job. This will improve the lists of creators, subjects and classifications when adding or editing metadata.

By running **Fetch authority record updates**, you will get updates regarding authority persons from DNB.

For titles that come from Onleihe, you can run the job **Fetch list of discarded titles from Onleihe** to fetch eMedia titles that have been discarded and should be cleared from the catalogue.

For Libris, you can fetch new and discarded titles as MARC records by running the job **Fetch metadata updates**.

For Onleihe you then run the **Handle metadata discard requests** job to execute removal of discarded titles. If there are existing items, reservations or eLoans connected to the discarded titles, these will not be discarded. The next time the job is run, it will try to handle the left-over titles again. You can see in the log file which titles could not be handled and take care of these manually. The corresponding job for Elib records from Libris is **Handle item discard requests**.

The **Authorise metadata entities** job authorises all metadata entities that is currently not authorised and have authority record control number matching the configured source.

Import of incoming ILL requests

You can also run the job **Import incoming ILL** to import ILL requests from Libris.

Import

You can import Antolin subjects and MARC records using the import tools.

Year end tasks

To support the acquisitions flow, you can perform year end processes to transfer any unfinished requisitions and orders from the current year to the next and manage periodicals.

You can also generate and download author fund reports based on number of loans per title or number of reference items per title. Only items set as item type **Reference** will be included in the author fund reports.

See also: Year end processes

Calendar

In the calendar you specify normal open days and special periods with other open days and also closure periods. You specify normal calendar entries per branch but closure periods on any level (per branch, authority or account). The system uses these entries when calculating due dates for loans.

Note:
It is important to define a correct calendar to make sure that due dates for loans do not end up on closed days. Overdue fees do not take the calendar into account.

You find the calendar configuration on the **Calendar** tab of the Configuration section in the main menu. Click a row in one of the lists to edit an existing calendar entry.

If you want to, you can display all calendar entries from the past by clicking the box **Include historical entries**.

Normal calendar entries

This is where you specify normal open days and also special periods with other open days. Normal open days must be set on branch level.

Note:
When changing or adding new open days there cannot be any overlap. For the new days to take effect, set previous open days to end before the new open days begin.

1. Select branch in the dropdown menu.
2. Click **Add**.
3. Type a description, such as *Summer open days*.
4. Specify the validity period with a **From** date and a **To** date.
5. Check the open days for the period.
6. Click **Save**.

Closure period entries

This is where you specify periods when the library is closed. Closure periods can be set on branch, authority or account level. To add a closure period for the entire account, you need to select **No selection** in the organisation dropdown menu.

1. Select authority or branch in the dropdown menu.
2. Click **Add**.
3. Type a description, such as *Education*.
4. Specify the validity period with a **From** date and a **To** date.
5. Click **Save**.

Tip:
You can use a rule to define a period to add to the due date, if the due date is a date when the library is closed in the calendar, to avoid that all items are returned on the first day after a closure period such as Christmas or Easter.

You find more details about the **Adjustment of due date because of closure** rule in the **Rules** section.

Users

The most common user type in Quria is **Staff** - the persons working at the library. There are also system users needed for self-service machines and public portals such as Arena. You find an overview of all users under the **Users** tab of the **Configuration** section in the main menu.

Searching for users

You can search for users' first and/or last names and then narrow down the search results by filtering on types of users, the branch that is the users' default workplace, roles, the period when the users were created and when they last signed in. You can also search for all users using * and then filter the search results.

Editing a user

- Click on a user in the list to open the details for that user, and make the updates.

Adding a staff user

When you add staff users, you also assign roles to the them. A user can have different roles depending on location; where they sign in.

1. Click **Add user** and select user type **Staff**. Mandatory fields are marked with an asterisk.
2. Add name, email address, language and country. Language and country is entered with 2 characters according to the **User interface languages** list.
3. Select the default workplace (all four dropdowns).
4. Click **Add role**. Select location using the dropdown menus - for the role to apply on a higher level and all levels below that, you should only make a selection for the account or account/authority depending on the scope. But for the role to apply only for a specific branch, you make selections in all the dropdowns.
5. Select the role for this user at the specified location in the role dropdown menu and click **Save**.
6. Click **Add role** again, if you want to assign another role for this user, at the same location or at another location.
7. Click **Save**.

Adding a system user

1. Click **Add user** and select user type **Public portal (system user)** or **Self-service (system user)**. Mandatory fields are marked with an asterisk.
2. Add name/description in the First name and Last name fields, user ID, language and country. Language and country is entered with 2 characters according to the **User interface languages** list.
3. Select where the equipment will be placed for default workplace (all four dropdowns).
4. For the **Public portal (system user)**, organisations and pick-up places have to be selected under **Public portal settings** in order to display holdings and pick-up places in the public portal such as Arena. These settings determine which organisations will be shown in **Extended search**, the holdings displayed for catalogue records and what fictive holdings that will be created.
5. Click **Save**.

User interface languages

Currently, the following languages (language variants) are supported in the Quria user interface.

User interface language	User setting - Language	User setting - Country
English (United Kingdom)	en	GB

User interface language	User setting - Language	User setting - Country
Czech	cs	CZ
Finnish (Finland)	fi	FI
French (France)	fr	FR
German (Germany)	de	DE
Norwegian (Bokmål)	nb	NO
Slovak	sk	SK
Swedish (Sweden)	sv	SE

User authentication

Quria uses OpenID Connect to authenticate users. OpenID Connect is a widely spread solution that enables SSO (Single sign-on) and simplifies the administration of user accounts in a municipality. User accounts are administered centrally including handling of passwords, adding/deleting employees etc. The administration of passwords and the rules, e.g. for 2-factor authentication, are all set up in the OpenID Connect Providers implementation.

OpenID Connect is an open standard and decentralized authentication protocol. Promoted by the non-profit OpenID Foundation, it allows users to be authenticated by co-operating sites (known as relying parties, or RP) using a third-party service, eliminating the need for webmasters to provide their own ad hoc sign-in systems. Users can sign in to multiple unrelated websites without having to have a separate identity and password for each.

The users that need access to Quria have to be registered in Quria to get correct permissions and roles. But only the user's email address is needed, the Quria administrator does not have to handle any passwords.

Verified providers

Currently, the following OpenID Connect providers are supported in Quria:

- Google
- Azure

See also: OpenID provider configuration and OpenID authentication configuration with scope = "openid email profile"

Logging user activity

Changes in the system that are initiated by users can be logged and presented. This functionality is commonly referred to as audit trail.

The audit trail functionality is available for many entities in Quria and is accessed via an icon (a small clock with an arrow) in the dialog headers for users that has been granted the **Audit trail** permission.

The log opens up in a new tab and gives information about who added or modified data, when it happened and what type of data it is. Automatic updates of data triggered by system functions will also be listed.

The actions and property names are only presented in English.

Currently, a maximum of 1000 events can be searched for a specific entity. The most recent events will be listed.

System settings

You find some Quria system settings on the **System settings** tab in the Configuration section of the main menu. These settings apply to all accounts.

Maximum overdue period for debt reminders

In order to exclude debts that have been overdue for a long time from debt reminders, you can set a maximum overdue period (days) for debts. The default value is 730.

The reason for making this setting is to prevent sending reminders for migrated debts that have already been subject to debt reminders. However, it should be noted that if you at a later point make longer pauses in your debt reminders, this setting may have unwanted consequences.

Note:
This setting should be defined at the time of installation before any debt reminders are sent, and only updated after careful consideration.

Maximum overdue period for overdue reminders

In order to exclude items that have been overdue for a long time from overdue reminders, you can set a maximum overdue period (days) for loans. The default value is 70.

The reason for making this setting is to prevent sending reminders for migrated loans that have already been subject to reminders. However, it should be noted that if you at a later point make longer pauses in your reminders, this setting may have unwanted consequences.

Note:
This setting should be defined at the time of installation before any reminders are sent, and only updated after careful consideration.

Save reservation history

You can define if reservation history should be kept or not. Possible values: *true* or *false*.

If set to *true*, no reservations are removed from the system regardless of status and will be searchable under **Reservations** on the **Collections** page.

Only active reservations are listed under **Reservations** on the patron details page regardless of this setting.

Preserve loan data for returned items (number of days)

You can define a number of days to preserve loan information for returned items. The value *-1* will make the system disregard this setting. This also affects patron information in the item transaction log. Loan history for patrons that have chosen to save loan history is not affected by this setting.

Number of patron names presented in the item transaction log

You can define the maximum number of patron names to present in the item transaction log for returned items. The value *-1* will make the system disregard this setting.

Prioritize cover URLs from the record

When presenting covers in Quria, you can decide if they should be based on cover URLs in the manifestation information instead of on the ISBN presented by the cover service.

External depots: Stop trapping reservations (number of days prior to external depot expiry date)

You can define the number of days prior to external depot expiry date when trapping of reservations will be stopped. If no value is set, the trapping will continue until the depot expiry date is reached, but patrons will not be able to borrow the item unless the expiry date is extended.

Show notification history after event has passed (number of days)

You can define the number of days to show notification history after the event causing the notification (such as overdue reminders and reservations) has passed. The notification history is displayed in the patron details and will be deleted once the period has expired.

Connection between Quria and external systems

In addition to exchanging data with a public portal where patrons can make use of library services, Quria can connect to a number of different systems for various reasons, such as order handling, import of metadata and update of patron information.

See also: Peripherals and integration configuration and External sources

Displaying and hiding holdings in the public portal

It is possible to adapt display of holdings in public portals such as Arena. Some filtering settings can also be configured in the public portal - please contact Axiell for more information.

Displaying fictive holdings

Fictive holdings need to be created for manifestations without holdings in order for patrons to find these records also in filtered searches (for example via extended search) in a public portal such as Arena. Usually, you want to create fictive holdings in the public portal for eBooks, ePeriodicals etc.

1. Go to the **Configuration** section in the main menu.
2. Under **Metadata and items**, select **Manifestation types**.
3. Make sure that **Automatically create fictive holdings in public portal** is checked for the relevant manifestation types.

Fictive holdings for these manifestation will be created and displayed in the public portal depending on the settings made for **Available organisations** for the user type **Public portal (system user)**.

See also: Adding a system user

Hiding holdings in departments and sections

You can hide holdings at selected departments and sections.

Note:
Modification of the **Hide** settings for departments and sections requires re-indexing of the public portal. Please contact Axiell for more information.

1. Go to the **Configuration** section in the main menu.
2. Under **Organisations**, click **Departments** or **Sections** respectively.
3. Click the department or section that you want to hide in the public portal, and check **Hide externally**.

If there are only items for a title at this department or section, the title will not be displayed in the public portal.

Departments that have been marked to be hidden externally will not be displayed in extended searches.

Updating patron information via Navet

Navet is the Swedish Tax Agency’s system for distributing population registration information to society.

As this information is specific to Swedish Quria installations and include some concepts relevant only in Sweden, the following descriptions are made available only in Swedish.

Uppdateringsfrekvens och -funktion

Quria hämtar uppdateringar av låntagare en gång i veckan. Följande filöverföringstjänster används:

- **Urval mot infil** – Navet uppdaterar alla nya låntagare som tillkommit sedan senaste körningen
- **Ändringsavisering mot infil** – Quria skickar alla personnummer och får tillbaka alla där uppdatering skett i Navet samt uppdaterar dessa

Uppdaterade uppgifter

Följande uppgifter uppdateras om de har ändrats:

- Namn
- Adress
- Födelsedatum
- Ändringskod

Skyddade personuppgifter

I Navet finns stöd för två olika nivåer av skyddade personuppgifter: *Sekretessmarkering* och *Skyddad folkbokföring*. För ytterligare information, se Skatteverkets webbplats: **skatteverket.se/privat/folkbokforing/skyddadepersonuppgifter.4.18e1b10334ebe8bc80001711.html**

Sekretessmarkering i Quria

Texten **Sekretessmarkering** visas under **Externa uppdateringar** i låntagaruppgifterna.

Skyddad personuppgift i Quria

Texten **Skyddad identitet** visas under **Externa uppdateringar** i låntagaruppgifterna. Dessutom raderas förnamn, efternamn och adressinformation och fältet **Efternamn** uppdateras till *Skyddad personuppgift*.