Quria - a Library Services Platform

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Marshall Breeding

librarytechnology.org

[Smart Libraries Q&A: Differences between ILS and LSP](librarytechnology.org)

The technical architecture of library services platforms follows the modern approach of software-as-a-service with the following characteristics.

Note that while many vendors promote their hosting services for legacy systems as SaaS, there are important technical distinctions.

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- Mutlitenant platform able to support all libraries using the product on a single instance of the system

- A single code-base so that all organizations use the same version of the software

- Hosted by the vendor or (or its hosting provider)

- Software updates are deployed at regular intervals with no technical installation routines required by users.

- Native web interfaces for all staff and patron features

- Flexible metadata structures able to describe different formats of content

- Ability to separate institutional data as needed

- Ability to aggregate data as needed

- API's exposed for all or at least most system functions and data elements

- Access to native database tables is generally not permitted in mutlitenant environments.

- Access to operating systems or other underlying components not provided to non-developers

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- Acquisitions and cataloging workflows that accommodate electronic and print resources and their associated business and legal frameworks

- Integrated knowledge bases for the managing electronic resources at the product or portfolio level rather than as individual journal titles

- Workflows following multiple procurement models: Subscriptions to electronic resources, selection of open access materials, management of article payment charges, demand-driven acquisitions, purchase of physical materials
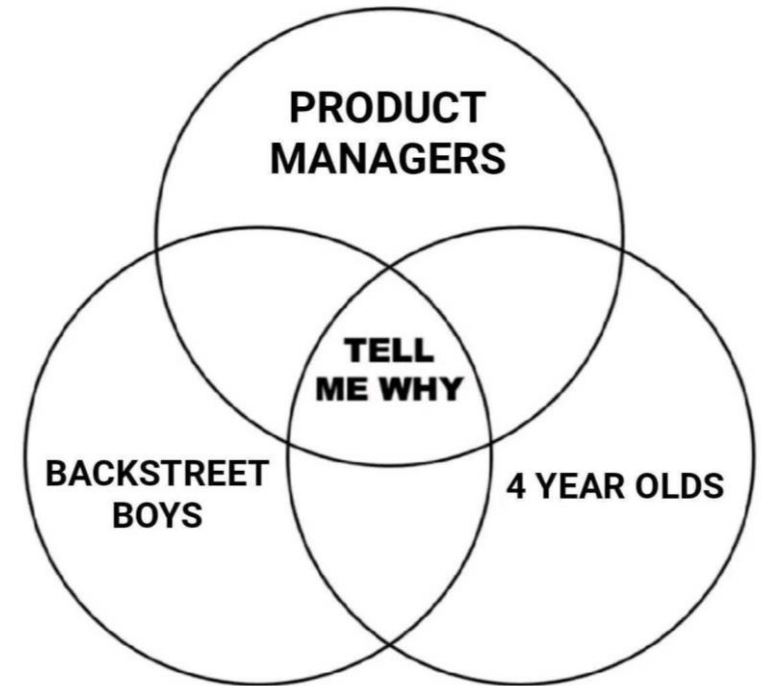
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- **Patron engagement**
  - Arena
  - Library App
  - Quria School/Welib
- **Event** management
  - Event calendar and seat booking tool for library events
- Federated search
  - Transforms Arena to **Quria Discover**
- **Linked data**
- **Case** management (2024)
  - Efficient handling of communication between patrons and the library

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Creating of a LSP for public libraries means that we need to

- Understand the bigger picture
- Focus on generic workflows
- Analyze every requirement from many angles
- Avoid development that adds unnessesary complexity.
- Learn by doing
- Face and solve unexpected challenges

PRODUCT MANAGERS

BACKSTREET BOYS

TELL ME WHY

4 YEAR OLDS

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Quria Installation Base
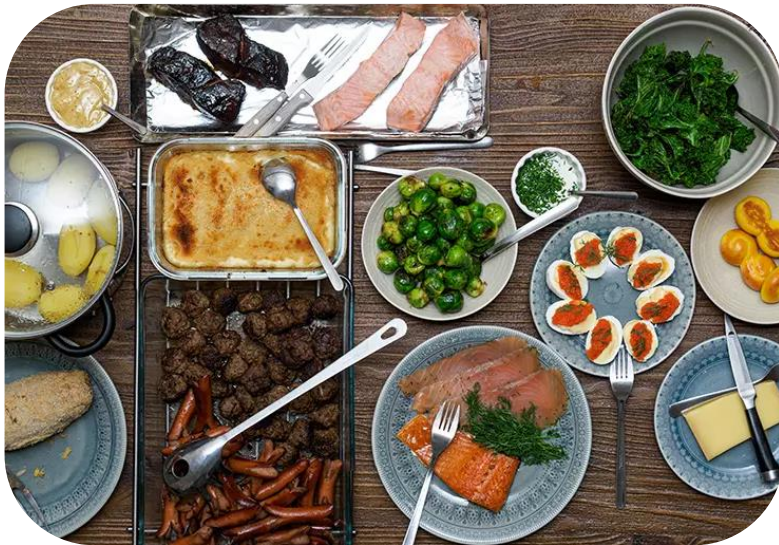
Status October 2023:

161 institutions live

42 in implementation

Total > **200** under contract

The past year!

Quria Digital Agreements
Mobile shelf list
New rules
Layout settings for various receipts
Temporary items
Acquisitions : Discounts, links to invoices from subscriptions, budget control when adding requisition
Patrons: More than one active e-mail, present debt id
Bill export in Json
Data export for use in 3rd party BA tools
RFID integrations
Component parts -
Payment methods
Block types

Infrastructural changes with huge improvement of general performance
Finland!

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Quria Digital Agreements

- An opportunity to get rid of paper agreements between the library and the patrons!

Next release - 14 November 2023

Bulk search

Works, expressions and manifestations

Search for works, expressions and manifestations with different criterias

RDA compliance

Possibility to add multiple creators on works by introducing the concept of additional creators.

RFID

Integration to MK Solutions/Tagvision staff stations

Report groups for e.g. yearly statistics

A possibility to configure and run grouped reports that can be reused in a simple way to minimize the work each time. Examples: yearly statistics to national institutions and monthly reports to the municipality

Postal code groups for Analytics

In order to support many libraries needs to report active patrons divided into "own municipality" and "other municipalities", it will be possible to define different groups within the framework of Analytics/Settings to group the patrons geographically, for example a group called "Own municipality" and then you specify which postcodes are included in this delimitation.

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Sustainable solution for analytical reports

- Create needed reports – this is where the most effort lies– but only once!

- Gather them in one group

- Sort in best order

- Run at new year in one go and get them sorted in the chosen order

- Save the files and wait until it's time to fill in the report

+

Postal code groups! For use to separate patrons from different municipalities or other geographical grouping, in analytical reports

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Bibliotekkortet

Mål 1: Brukeren skal på sikt kunne bestemme sikkerhetsnivå for autentisering selv

- Överenskommelse med NB om att de bygger en inloggningsservice som vi implementerar i Arena
- Låntagare som i NL bestämmer att de inte vill bruke en pinkod kommer inte kunna logga in med lånekort+pin i Arena

Mål 2: Bibliotekansatte skal først få tilgang til fulle opplysninger om en nasjonal låner når hen er tilknyttet biblioteket

- Endast namn, födelsedatum, kön och lånekort visas när man har slagit upp en låntagare i samband med nyregistrering.
- Kortet med "Mer information" visas som read-only och all data är maskerad
- När låntagaren sparas hämtas all information in och visas för den ansatte. Om man registrerar en låntagare manuellt fungerar allt som tidigare.

Mål 4: Kvalitetssikring av opplysninger om brukerne

Gäller låntagarnas adresser.
Specifikationsarbete pågår

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Roadmap 2024

Bibliotekskortet	SRU: K10plus	Bulk WEM actions	Authorization of subjects	Improved reservation cooperation
OAI-PMH improvements	Print labels from Collection/Items	Continuous RDA compliance work	Settings for administration of the self registration form in Arena	System notifications to Quria users
EKZ Standing orders	Floating collections	Permissions for configuration	**Quria Case management**	Intended audience

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Tack för mig!