Atriuum®

# What's New in Atriuum 12.7


**Reserve Features** 3

Library Kiosks (Requires License) 3

Change Pickup Location 7

Anywhere as a Pickup Location (Centralized only) 8

Item Locations on Reserve Notifications 9

Patron Unavailability Dates 10

Reserve Details Navigation 12

Reserve Action Items Auto Removal 13

**Patron Features** 14

Copy Patron 14

Contact Preference Enhancements 15

Password Complexity Requirements 16

Max Log On Attempts 17

Patron Nickname Field is User Defined 18

**Circulation** 19

Due Date Calendar Report 19

**Report Features** 20

Circulation By Physical Location 20

Filtering by Custom Item Status 21

Circulation Combinations in Branch Statistics (Centralized only) 22

**Searching Features** 23

Combo and Expert Search Enhancements 23

**OPAC Features** 24

Study Program Quiz/Note in Search Results 24

Genre Media Icons 25

Field Validation in My Items 26

Blocked Circulation Warning in My Items 27
Library Information Page Redesign 28
**ILL Features (Requires License) 29**
Inter-Library Loan (ILL) Brief Record Default 29
Active ILL Requests in Batch Check Out 30
**Self Check Stations (Requires License) 31**
Dust Jackets in Self Check Stations 31
Blocked Circulation Warning in Self Check Stations 32

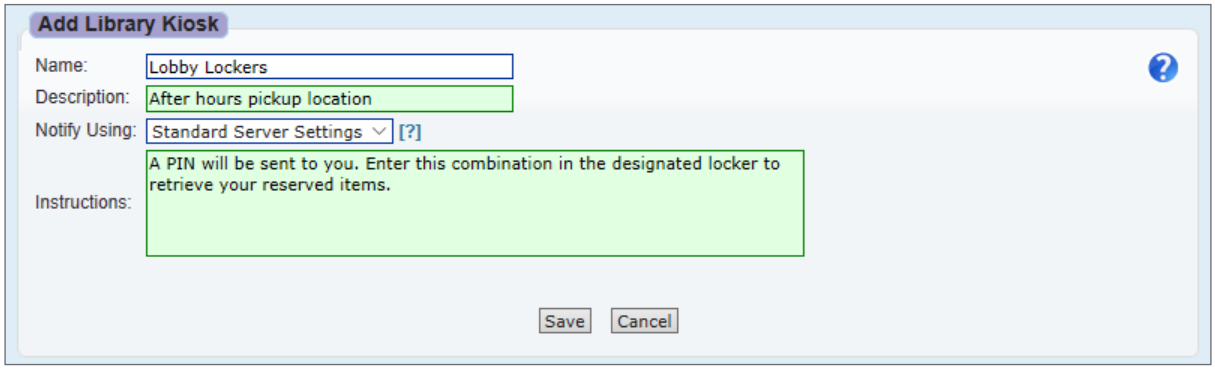
# Reserve Features

## Library Kiosks (Requires License)

If your library uses automated lockers to facilitate reserves for after hours pickup or to service remote locations, you can use this new Atriuum module to manage these circulation tasks. You can also use library kiosks to designate specialized pickup locations within a building.

**To create a library kiosk record**

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Circulation**.
2. Click **Library Kiosks**.
3. Click **Add New Library Kiosk**.
4. Enter a name to identify this pickup location.
5. If your library is **Centralized**, the designated default branch displays. Use the drop-down list to select the branch that will be responsible for checking out items and delivering them to this kiosk.
6. Enter a description of the location.
7. Next to **Notify Using:**, select how patrons should be notified.
   - ***Standard Server Settings*** - Automatic notifications will be sent according to the same method as **Reserve Shelf** items. Choose this for on-site locations that will be frequently serviced.
   - ***Overnight Delay*** - Notifications will be queued and sent automatically during overnight background tasks or at your designated custom times (based on patron and server settings).
   - ***Manual Push*** - Notifications will be sent manually using options from the **Library Kiosk Management** form. Choose this for remote locations that are not serviced daily.
8. Enter any instructions patrons need to access the items. These will be included in notifications.
9. Click **Save**.




***Kiosk form image for a Distributed database***

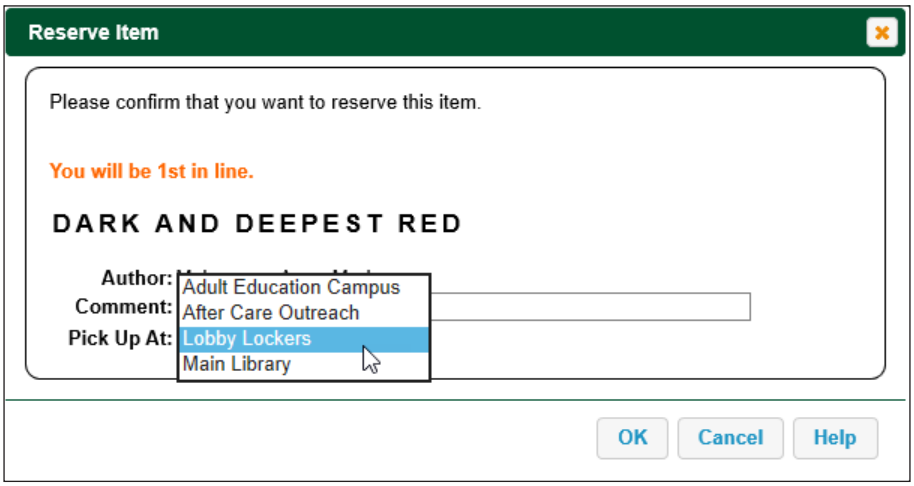
To start using the kiosks module at your library, contact your Book Systems Sales representative today.

**Choosing kiosks as pickup locations**

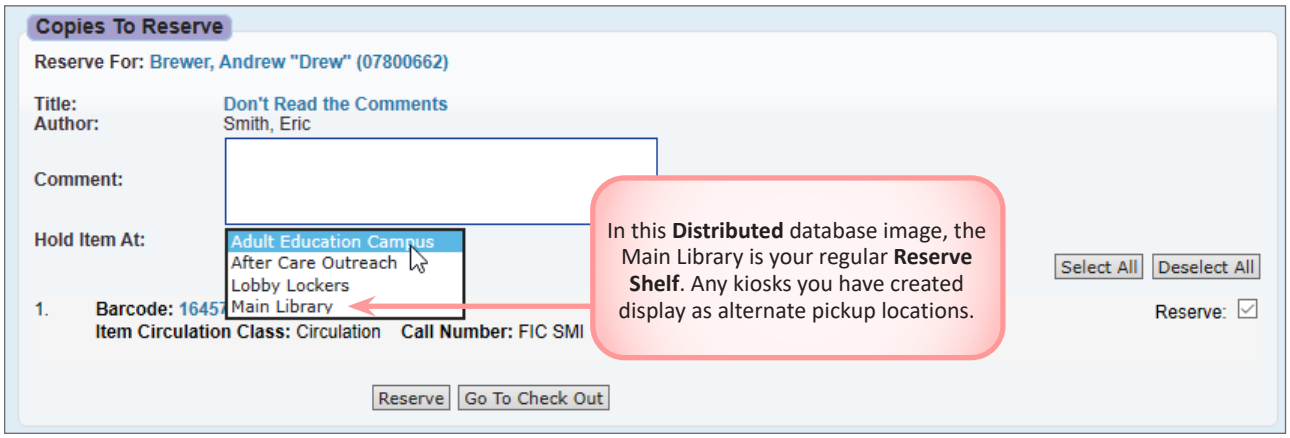
Patrons can reserve items through **OPAC** and select a kiosk as the pickup location. The same is true for librarians creating reserves in Atriuum. If your library is **Centralized**, the only workflow change you will see is that kiosks display like Branches anywhere you can see or set a pickup location.

If your library is **Distributed**, pickup locations are new to you. The scenarios below explain where you will see this new field when making and managing reserves.

In OPAC, patrons can select a location from the list when reserving an item.




In Atriuum, you can select a location from the list when creating a reservation for a patron.

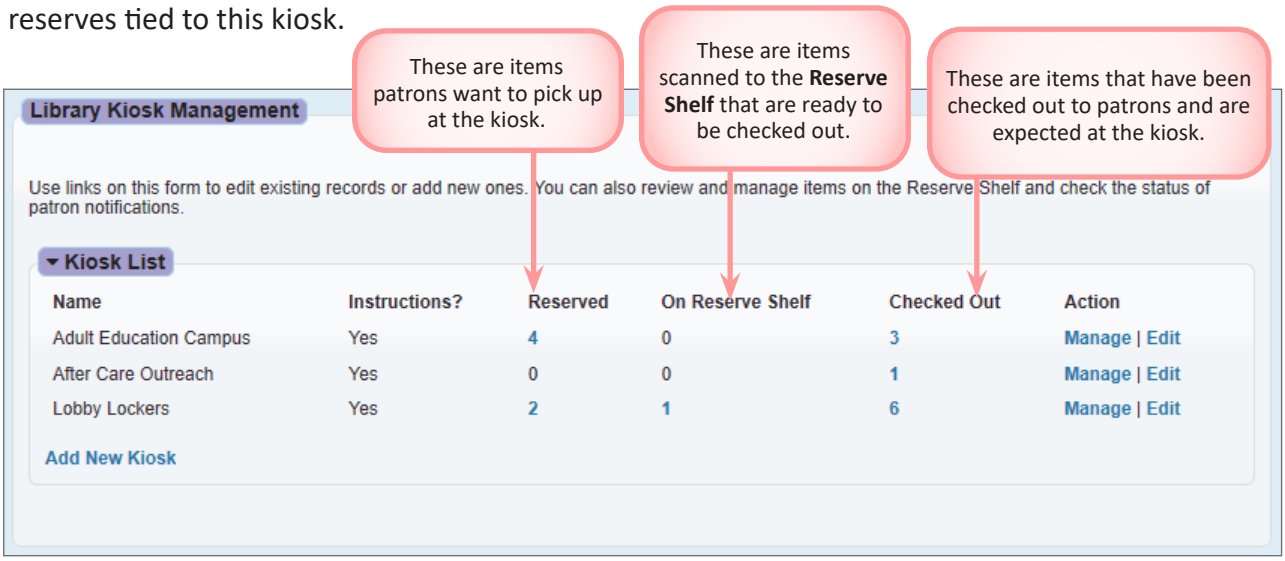



Library staff using the **Circulation Desk** interface must enable the **Specify Pickup Location On Reserve:** worker setting to designate pickup locations when creating reserves.

**To manage kiosks**

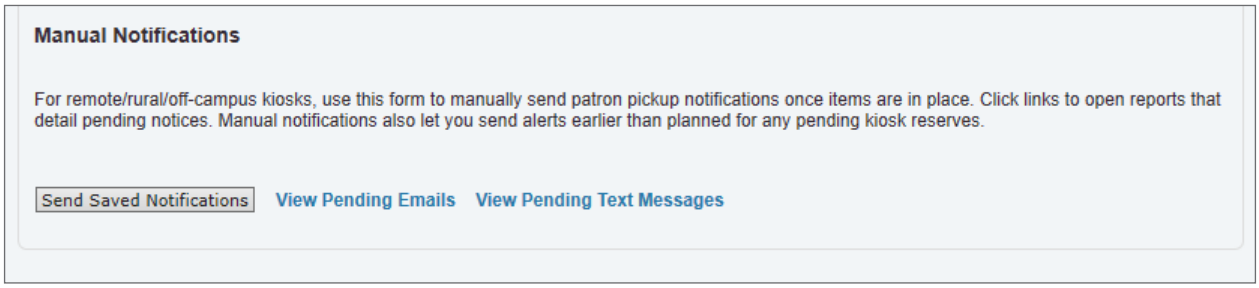
Once patrons have reserved items to pick up at a kiosk, items will need to be placed at those locations. You will also need to check out the items to the requesting patrons; notifications may also need to be sent if the kiosk settings require a manual push. To see the status of kiosks and items, use the **Library Kiosk Management** form. The scenario here is for a **Distributed** database.

1. Click **Circulation** from Atriuum's **Menu Bar**; under **Reserve**, click **Library Kiosk**.
2. The **Library Kiosk Management** form lists each kiosk, along with the status of the items assigned to the kiosk.
3. Click the **number** in the **Reserved** column, for example **4**, to open a report that lists details of all reserves tied to this kiosk.




4. Pull the items from the stacks, and scan each item onto the **Reserve Shelf** using your usual workflow.
5. When you are ready to place the items in the kiosks, return to the **Library Kiosk Management** form using step 1. The number of items under the **On Reserve Shelf** column reflects your changes.
6. Click **Manage**. The patrons and their reserved items display.
7. Next to a patron, click **Check Out**. The items are checked out to the patron. Click **Return To Library Kiosk**, and repeat this step for each patron.

8. Once items have been checked out, the patron's circulation period begins.
9. After items have been placed in your kiosks, notifications are sent based on kiosk settings and patron preferences.
    - If this kiosk is set for ***Standard Server Settings*** or ***Overnight Delay*** notifications, Atriuum will send the notifications according to your settings.
    - If the kiosk is set for ***Manual Push*** notifications, you must click **Send Saved Notifications** to alert patrons that their items are available for pickup. To preview the notifications to be sent, click **View Pending Emails** or **View Pending Text Messages**.



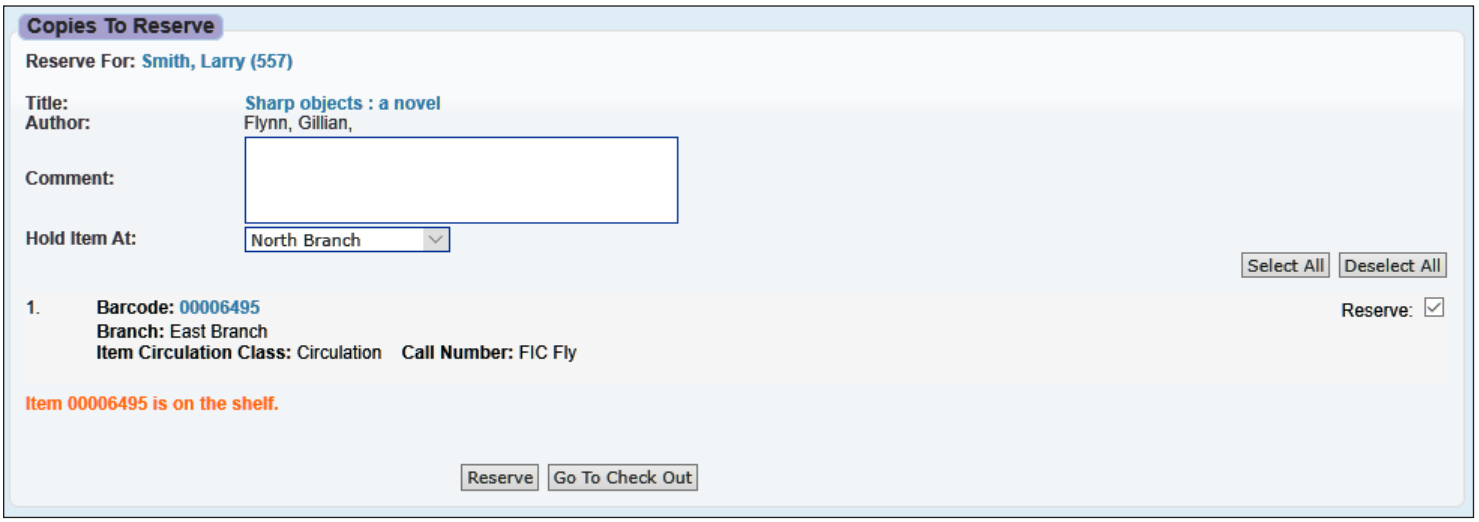

    - If patrons prefer phone calls (by contact preference) the **Phone Call Requested** notification will be added to the **Patron Information** form. Since items at kiosks must be checked out to patrons before they physically have the items in hands, these notifications are not automatically deleted; they must be manually removed.
10. When returned items are checked in, their normal circulation status is reinstated.

## Change Pickup Location

You can now easily change the pickup location after an item has been placed on the **Reserve Shelf** without having to delete and recreate the reserve.

**To change a Reserve Shelf item's pickup location**

1. Click **Circulation** from Atriuum's **Menu Bar;** under **Reserve**, click **Reserve Shelf**.
2. Click **Change Pickup Location**. A pop-up displays; you must confirm that the item should be removed from the current location's Reserve Shelf.
3. The **Copies To Reserve** form opens with information about the reservation.
4. Click the **Hold Item At:** drop-down button, and click again to select another location from the list.
5. Click **Reserve**.
6. The item is ready to be sent to the new pickup location.



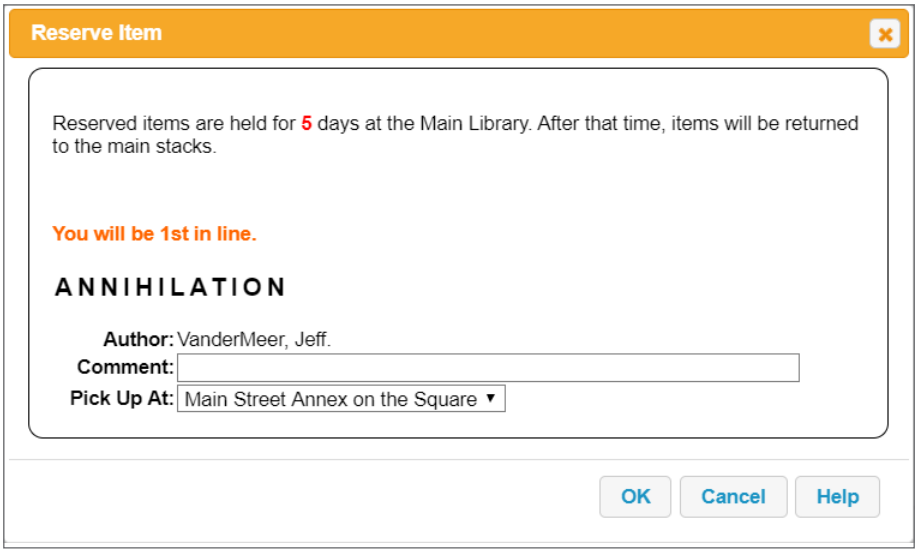

This option only displays in **Distributed** databases if you have set up **Library Kiosks** (requires license).

## Anywhere as a Pickup Location (Centralized only)

Previously, Atriuum allowed patrons to choose "*Anywhere*" as a pickup location, indicating that they were willing to pick up the item at any available branch if it meant getting the item sooner. For libraries that prefer to hide this option, requiring patrons to choose a pickup location, there is a new setting. When disabled, patrons will not see "*Anywhere*" in the list of pickup locations in **OPAC**. However, the option always displays in Atriuum for librarians.

### To disable the setting

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **OPAC**.
2. Click **General And Patron Account Settings**.
3. In the *Reserve Settings* section, next to **Allow Patrons To Choose Anywhere As A Pickup Location:**, click **No**.
4. Click **Save**.



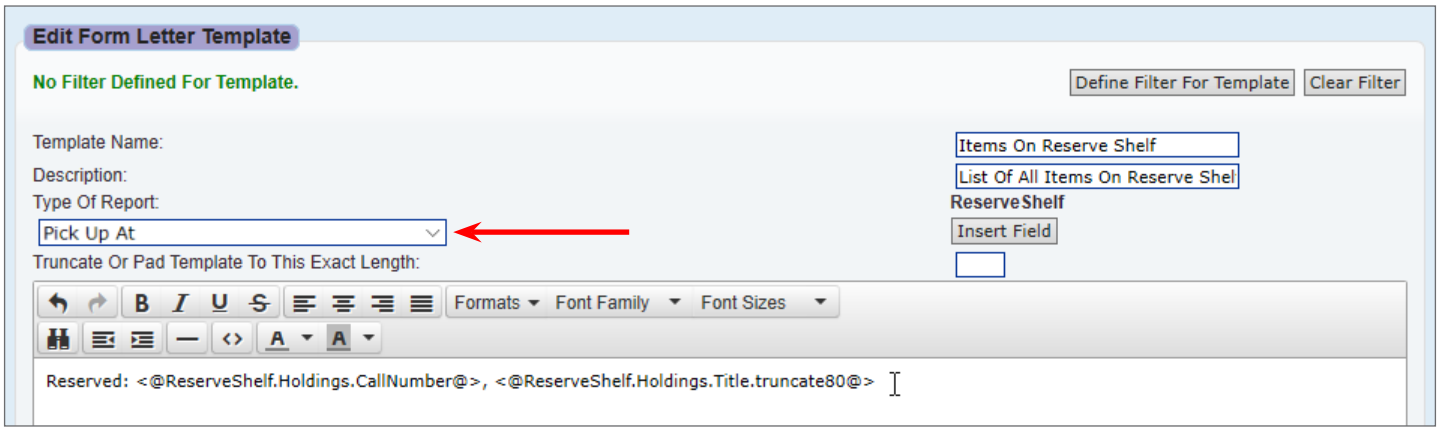
## Item Locations on Reserve Notifications

If you send notifications to patrons, the pickup location is now included in messages as a reminder to patrons. In **Centralized** databases, the pickup location may be a **Branch** or a **Kiosk** (requires license; see "Library Kiosks").

If you are a **Distributed** database and have set up Library Kiosks, you may choose to edit your **Items On Reserve Shelf** template to include the pickup location; this template is usually included in the **Reserve Shelf Items** form letter sent to patrons.

**To edit a Reserve Shelf notification**

1. Click **Patrons** from Atriuum's **Menu Bar**; under **Form Letters**, click **Templates**.
2. In the **Action** column for **Items On Reserve Shelf**, click **Edit**.
3. Place your cursor in a suitable location in the template. One example is pictured below.



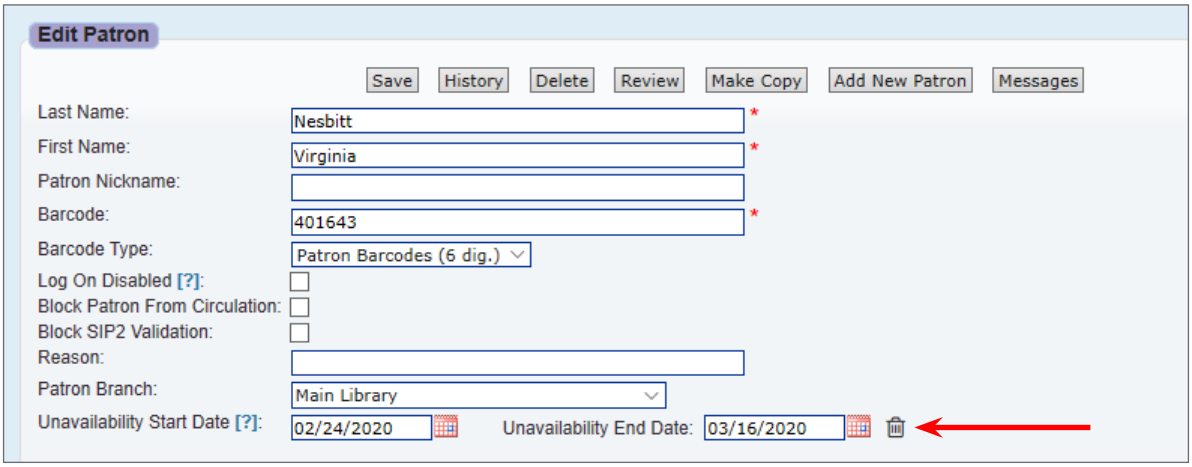

4. Click the drop-down button above the text area, and click again to select ***Pick Up At*** from the list; then, click **Insert Field**.
5. The code for the pickup location is added to the template; this information will be filled in when notifications are sent. You may add additional introductory text before the field to provide context.
6. Click **Save** to keep your changes.

## Patron Unavailability Dates

If you have patrons who want to reserve items but may be unavailable for certain weeks or months of the year, those patrons can set unavailability dates to represent when they cannot claim reserved items. This is useful for patrons who take extended vacations, are deployed, etc. Their place in the reserve list will be maintained while keeping the items available for other patrons.

**To set unavailability dates for a patron**

1. Click **Patrons** from Atriuum's **Menu Bar**; under **Patron**, click **Edit**, and search for the patron you need to modify.
2. In the **Unavailability Start Date:** and **Unavailability End Date:** fields, use the calendar icon (or enter dates in the mm/dd/yyyy format) to define the date range during which the patron cannot claim reserves.
3. Click **Save**.

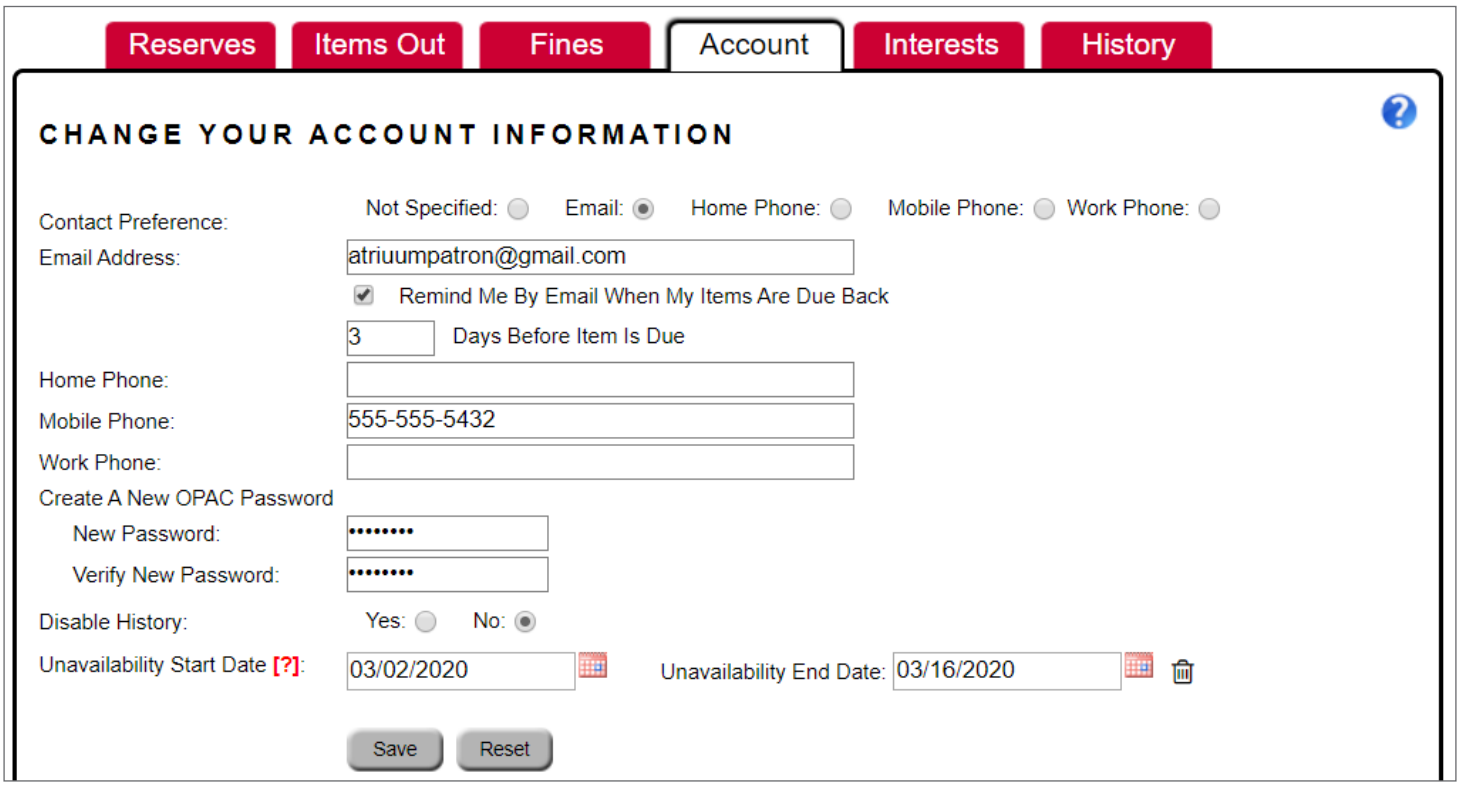



You can also allow patrons to set their own availability dates in their online accounts. For instructions, see the next page.

**To set unavailability dates as a patron in OPAC**

For patrons to modify their account information, the **Allow Patrons To Change Account Info From OPAC:** setting must be enabled on the **General And Patron Account Settings** form.

1. When logged on to **My Items**, click the **Account** tab.
2. In the **Unavailability Start Date:** and **Unavailability End Date:** fields, use the calendar icon (or enter dates in the mm/dd/yyyy format) to define the date range for which reserves cannot be claimed.
3. Click **Save**; enter the account password to confirm changes, and click **Submit**.

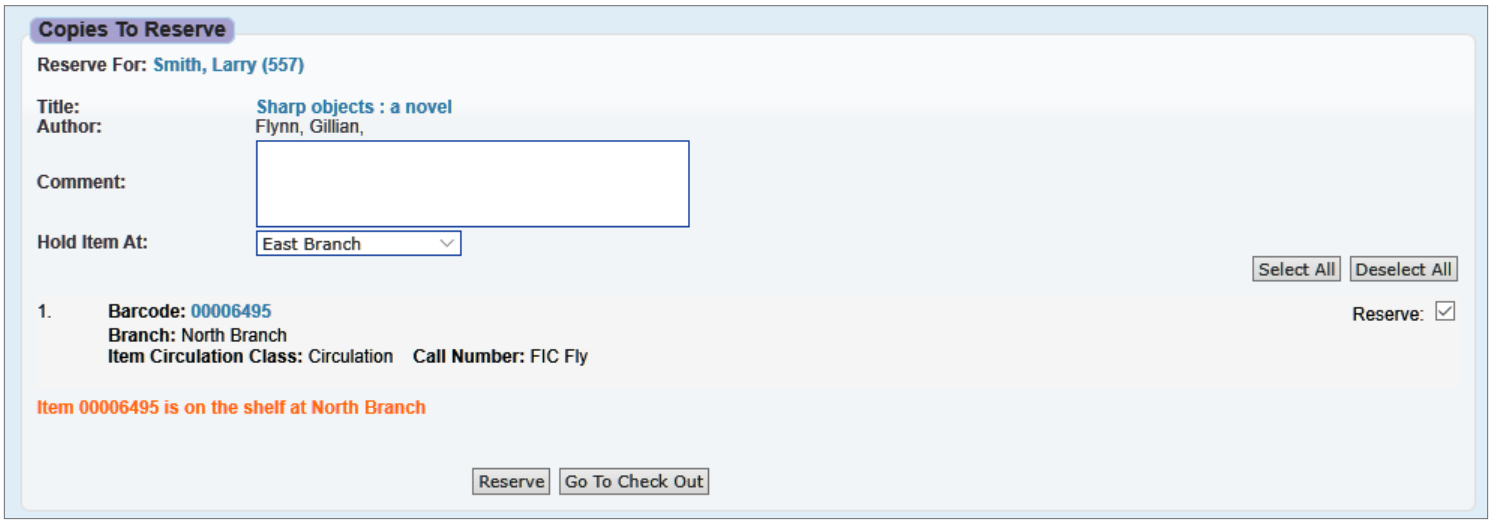


## Reserve Details Navigation

New links on the **Copies to Reserve** form allow you to quickly review the patron, bibliographic, or holding record so you can verify information before completing the reserve. Links have also been added to other reserve forms including the **Items On Reserve Shelf**, **Reserve Shelf** in **Batch Check Out**, etc.

### To open the Copies to Reserve form

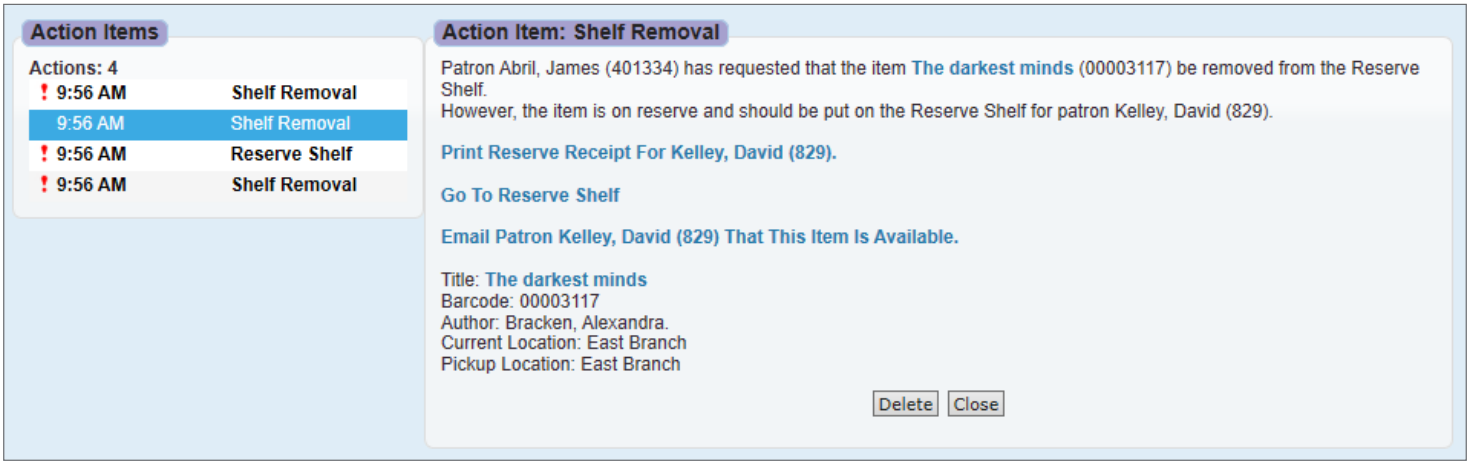
1. Click **Circulation** from Atriuum's **Menu Bar**; under **Reserve**, click **Reserve**.
2. Search for the patron who wants to reserve an item.
3. Search for the item the patron wants to reserve.
4. On the **Copies To Reserve** form, you can use the following links:
    - To review the patron record, click the patron **name**.
    - To review the bibliographic record, click the **title**.
    - To review the holding record, click the **barcode**.



## Reserve Action Items Auto Removal

If you use **Action Items** to manage patron reservation requests, actions that have already been completed are automatically removed from other workers' lists to avoid duplication of effort.

No additional setup is required.



# Patron Features

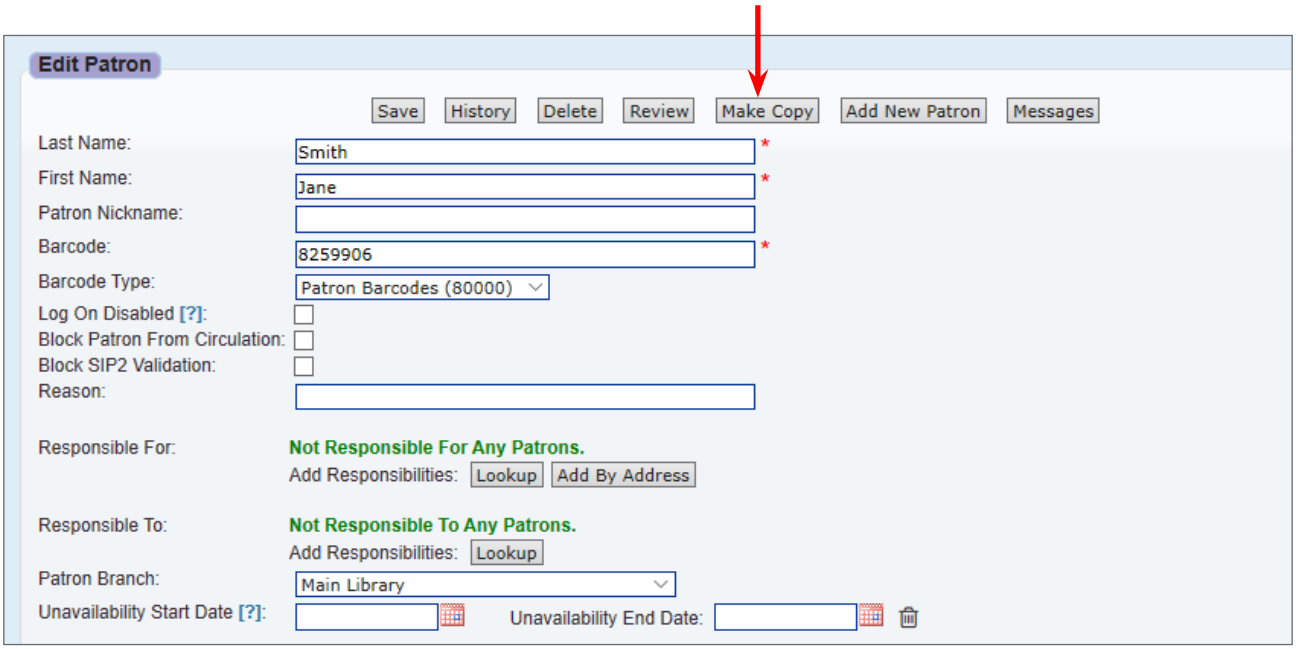
## Copy Patron

When adding new records for an entire family, Atriuum allows you to copy a record, saving you the time of entering identical information for multiple patrons. With this update, two settings allow you to copy more fields to the new record, including notification settings and user defined fields. However, no unique fields, like barcode or driver's license, are copied over.

**To enable the settings**

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Patrons**.
2. Click **Patron Settings**.
3. Next to **Copy Notification Settings When Duplicating Patron Records:**, click **Yes**.
4. Next to **Copy User Defined Fields When Duplicating Patron Records:**, click **Yes**.
5. Click **Save**.

To duplicate a patron record, click **Make Copy** at the top of the **Edit Patron** form. Update the name and any unique information that differs from the original record, and save it.

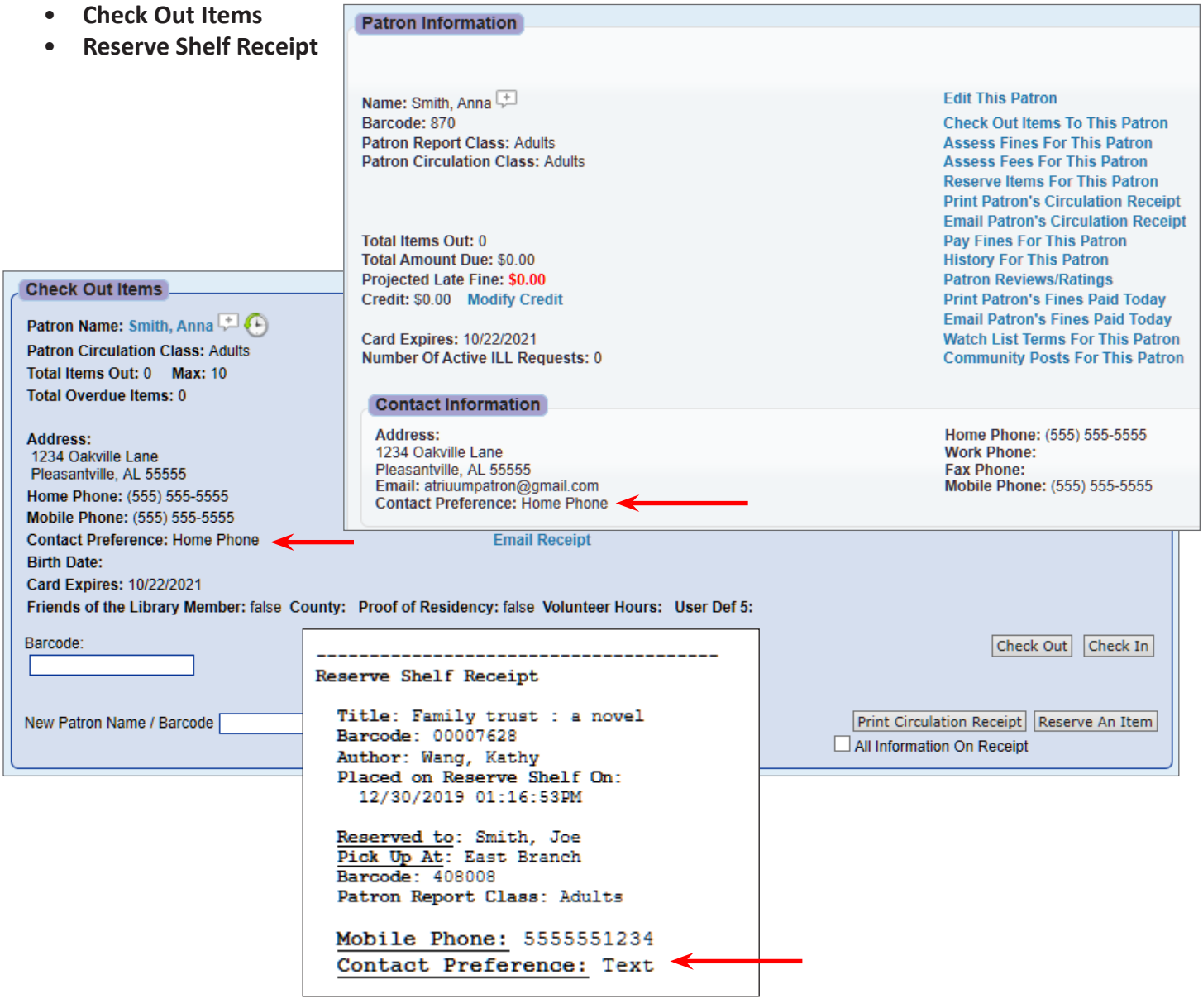


## Contact Preference Enhancements

Contact preference helps you communicate with your patrons on their terms. Some patrons may prefer a text or email, and some would prefer to be contacted by phone. This field is now visible in various places in Atriuum. Validation has also been added so that a contact preference cannot be saved if the related contact information is not filled out; for example, in **OPAC**, a patron cannot set **Text** as their preference but leave the **Mobile Phone:** field empty.

A few locations for this information include the following forms:

- **Patron Information**
- **Check Out Items**
- **Reserve Shelf Receipt**



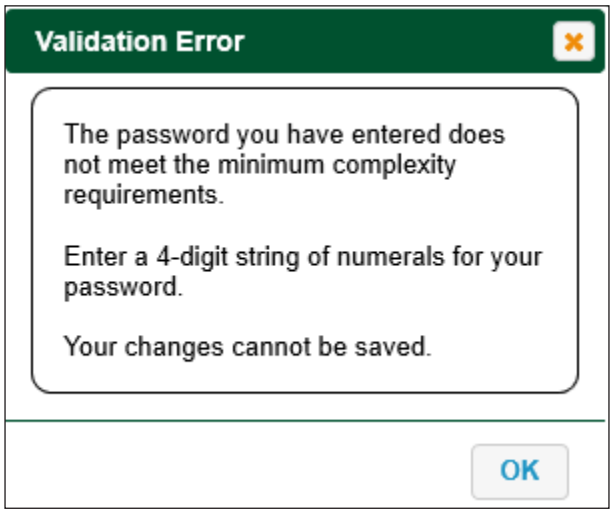
## Password Complexity Requirements

We value your patrons' security as much as you do. To make patron accounts more secure, you can require patrons to choose a password that meets certain preselected criteria. This will not impact existing patron passwords. This setting applies to **My Items** in **OPAC** as well as **Self Check Out** (requires license) if you require password entry there.

**To set password requirements**

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Patrons**.
2. Click **Patron Settings**.
3. Under *Patron Password Settings*, next to **Assign Patron Password Complexity:**, select one of the following options from the drop-down list:
   - ***Unrestricted*** - This selection is enabled by default; patrons can choose any combination of alphanumeric characters they want.
   - ***4-Digit PIN*** - This selection requires patrons to choose a string of 4 numerals to secure their account.
   - ***Complex*** - This selection requires patrons to choose an 8-16 character password that contains all of the following: uppercase and lowercase letters, numerals, and at least one special character.
4. Click **Save**.

During password changes in **My Items** (if you allow patrons to change passwords using their online accounts), If patrons enter an invalid password, they will be given a hint to inform them of what is required.



## Max Log On Attempts

To prevent unauthorized users from accessing your patrons' accounts, you can enable a setting that limits the number of times patrons can enter an incorrect password before their account is blocked. This setting applies to **My Items** in **OPAC** as well as **Self Check Out** (requires license) when a password is mandated.

Patrons are automatically blocked after the designated number of attempts, and a staff member must reset their accounts using the **Edit Patron** form to restore their access.

**To enable the setting**

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Patrons**.
2. Click **Patron Settings**.
3. Under *Patron Password Settings*, next to **Max Failed Log On Attempts:**, select one of the following options:
    - ***Unlimited*** - There are no restrictions on the number of attempts.
    - ***3*** - Patrons have three tries to enter the right password. On a fourth incorrect attempt, they will be warned, and if they enter another incorrect password, their account will be blocked.
    - ***5*** - Patrons have five tries to enter the right password. On a sixth incorrect attempt, they will be warned, and if they enter another incorrect password, their account will be blocked.
4. Click **Save**.

**To unblock a patron account**

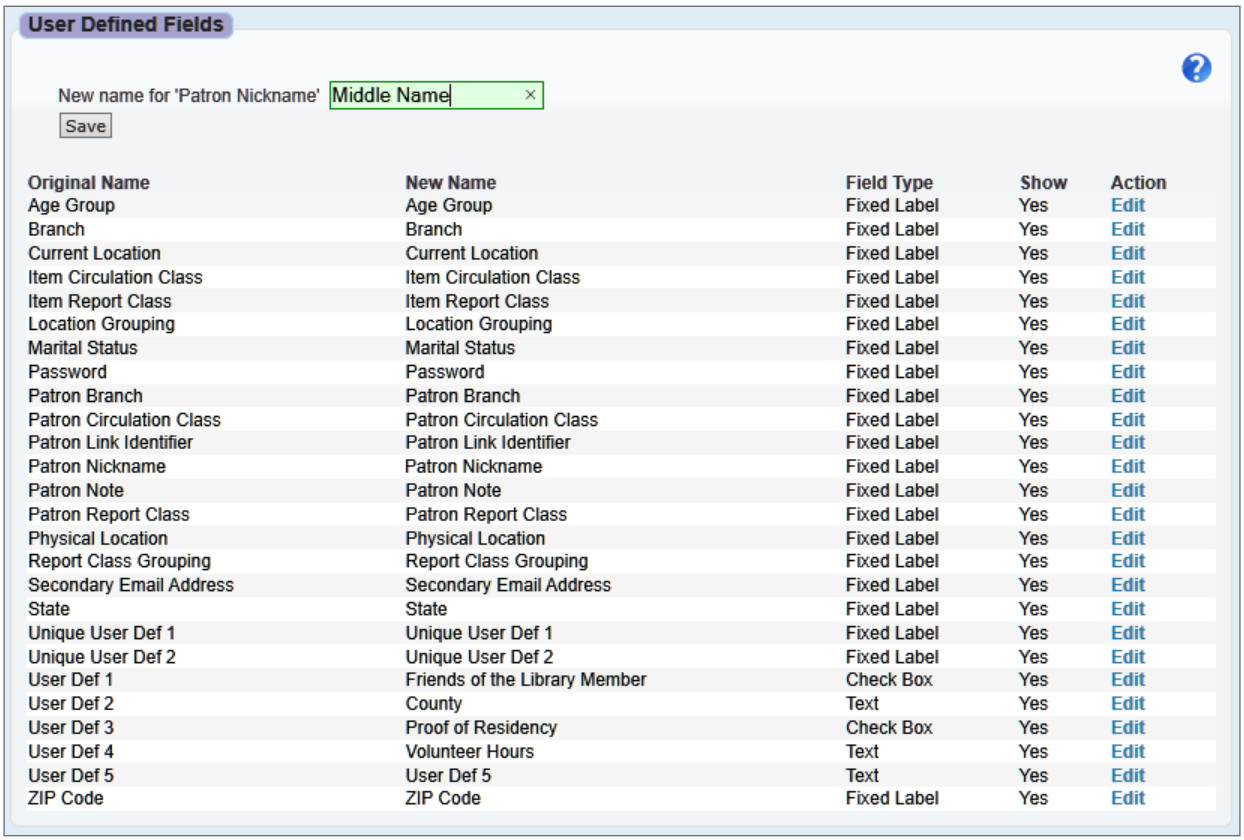
1. Click **Patrons** from Atriuum's **Menu Bar**, and then click **Edit**.
2. Search for the patron by name or barcode.
3. If the patron's account is blocked, the **Log On Disabled:** check box is selected. Click to deselect the check box, and then click **Save**.
4. The patron's account access is restored.

## Patron Nickname Field is User Defined

If you typically enter information in the **Patron Nickname** field, such as the patron's middle name, you can rename it so that the label matches the contents. This may help you quickly distinguish between patrons with the same first and last names.

**To rename the Patron Nickname field**

1. Click **Administration** from Atriuum's **Menu Bar,** and then click **Library**.
2. Click **User Defined Fields**.
3. Click **Edit** in the **Action** column for **Patron Nickname**.
4. Enter a new name in the field.
5. Click **Save**; the new name will display in form names, fields, menus, etc.




| Original Name | New Name | Field Type | Show | Action |
|---|---|---|---|---|
| Age Group | Age Group | Fixed Label | Yes | Edit |
| Branch | Branch | Fixed Label | Yes | Edit |
| Current Location | Current Location | Fixed Label | Yes | Edit |
| Item Circulation Class | Item Circulation Class | Fixed Label | Yes | Edit |
| Item Report Class | Item Report Class | Fixed Label | Yes | Edit |
| Location Grouping | Location Grouping | Fixed Label | Yes | Edit |
| Marital Status | Marital Status | Fixed Label | Yes | Edit |
| Password | Password | Fixed Label | Yes | Edit |
| Patron Branch | Patron Branch | Fixed Label | Yes | Edit |
| Patron Circulation Class | Patron Circulation Class | Fixed Label | Yes | Edit |
| Patron Link Identifier | Patron Link Identifier | Fixed Label | Yes | Edit |
| Patron Nickname | Patron Nickname | Fixed Label | Yes | Edit |
| Patron Note | Patron Note | Fixed Label | Yes | Edit |
| Patron Report Class | Patron Report Class | Fixed Label | Yes | Edit |
| Physical Location | Physical Location | Fixed Label | Yes | Edit |
| Report Class Grouping | Report Class Grouping | Fixed Label | Yes | Edit |
| Secondary Email Address | Secondary Email Address | Fixed Label | Yes | Edit |
| State | State | Fixed Label | Yes | Edit |
| Unique User Def 1 | Unique User Def 1 | Fixed Label | Yes | Edit |
| Unique User Def 2 | Unique User Def 2 | Fixed Label | Yes | Edit |
| User Def 1 | Friends of the Library Member | Check Box | Yes | Edit |
| User Def 2 | County | Text | Yes | Edit |
| User Def 3 | Proof of Residency | Check Box | Yes | Edit |
| User Def 4 | Volunteer Hours | Text | Yes | Edit |
| User Def 5 | User Def 5 | Text | Yes | Edit |
| ZIP Code | ZIP Code | Fixed Label | Yes | Edit |

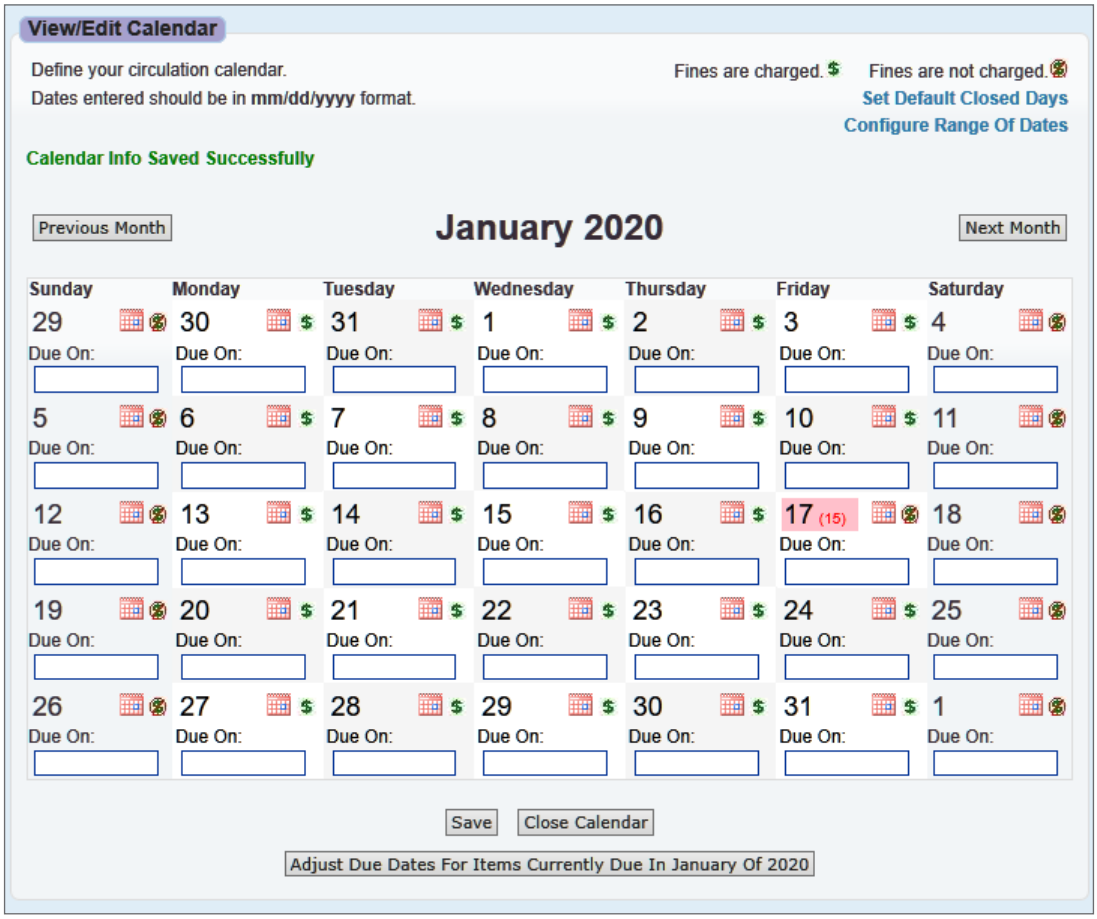
# Circulation

## Due Date Calendar Report

If you need to close the library for a unplanned event or an unexpected closure such as inclement weather, technology updates, etc., you can forgo fines or redirect the due dates for items. After marking the date closed for the purposes of fine accrual, you can now click the number of items due that day to view a report listing related details.

**To adjust the due date calendar and view the report**

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Circulation**.
2. Click **Due Date Calendar**.
3. For the date the library will be closed, click the dollar sign icon to forgo fines. Then, click **Save**.
4. The **Due Date Calendar** displays the number of items with that scheduled due date in **red**.
5. Click the number, **(15)** in the image below, to open a report listing all the items with that due date.



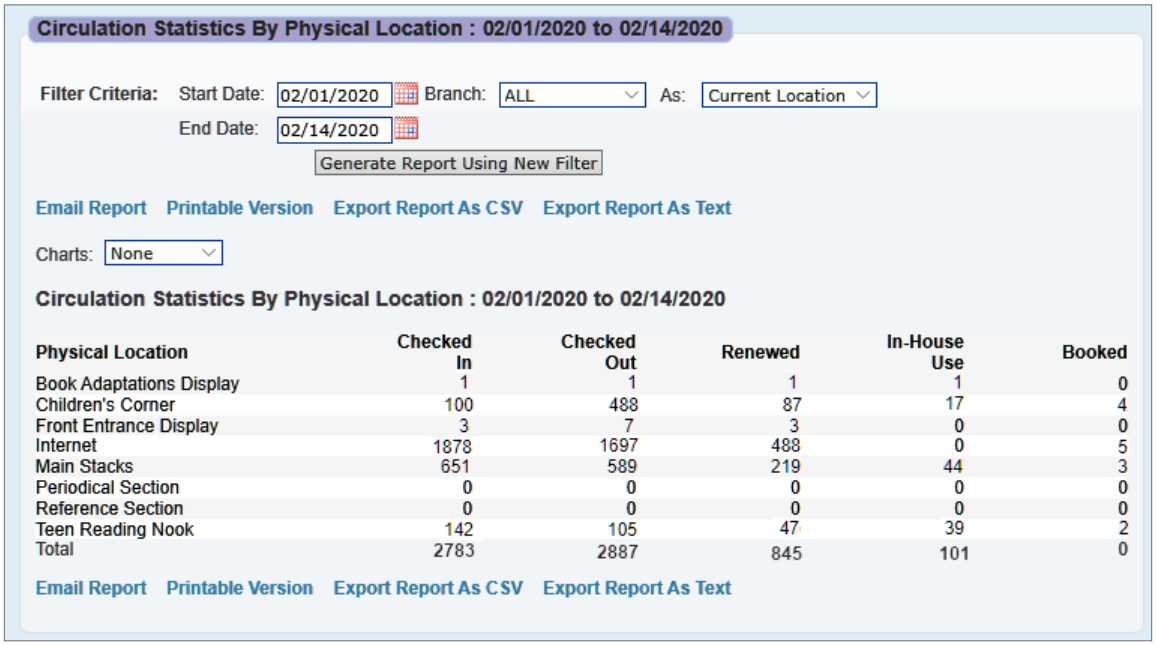
# Report Features

## Circulation By Physical Location

Curious about which sections of the library are circulating the most items? You can use the new **Circulation By Physical Location** statistical report to track the number of items checked in and out, renewed, used in-house, and booked for each area of the library.

### To run a Circulation By Physical Location report

1. Click **Reports** from Atriuum's **Menu Bar**; under **Administration**, click **Statistical Reports**.
2. Click **Circulation By Physical Location**, or click **View** in the **Action** column.
3. By default, this report shows data from the first of the month until now, but you can edit the date range as needed. If you make modifications, click **Generate Report Using New Filter**.

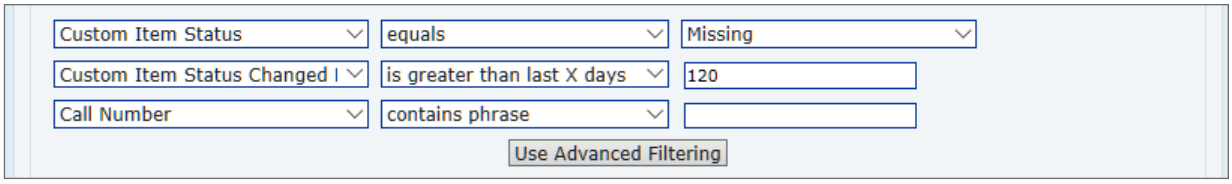


## Filtering by Custom Item Status

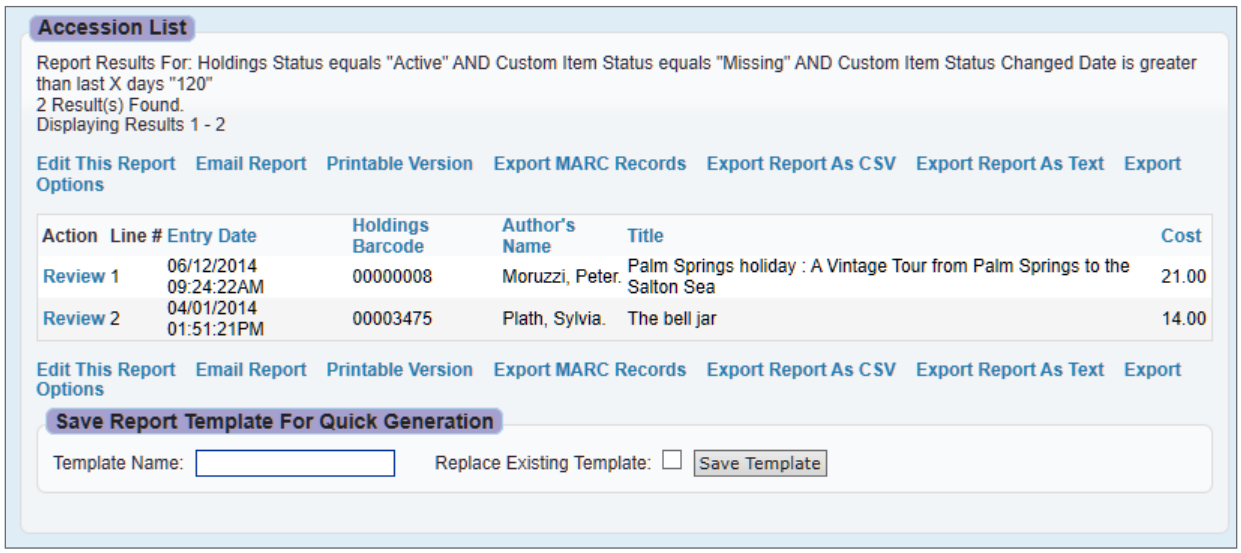
Do you need to be able to identify items based on how long they have had a custom item status? For example, if you apply a status of "*Missing*" to items for a set period before marking those items lost, you can now use a report filter to find all the items that were marked missing a certain number of days ago. The steps below illustrate this example.

**To filter by a Custom Item Status date range**

1. Click **Reports** from Atriuum's **Menu Bar**; under **Items**, click **Accession List**.
2. The **Easy Filtering** form opens in a new window.
3. Using one row of drop-down lists, set a criterion for *Custom Item Status equals Missing*.
4. Using the second row of drop-down lists, set a criterion for *Custom Item Status Changed Date is greater than last X days 120*.




5. Click **Generate Report**. The report displays items that were marked missing in your system 120 days ago or more.

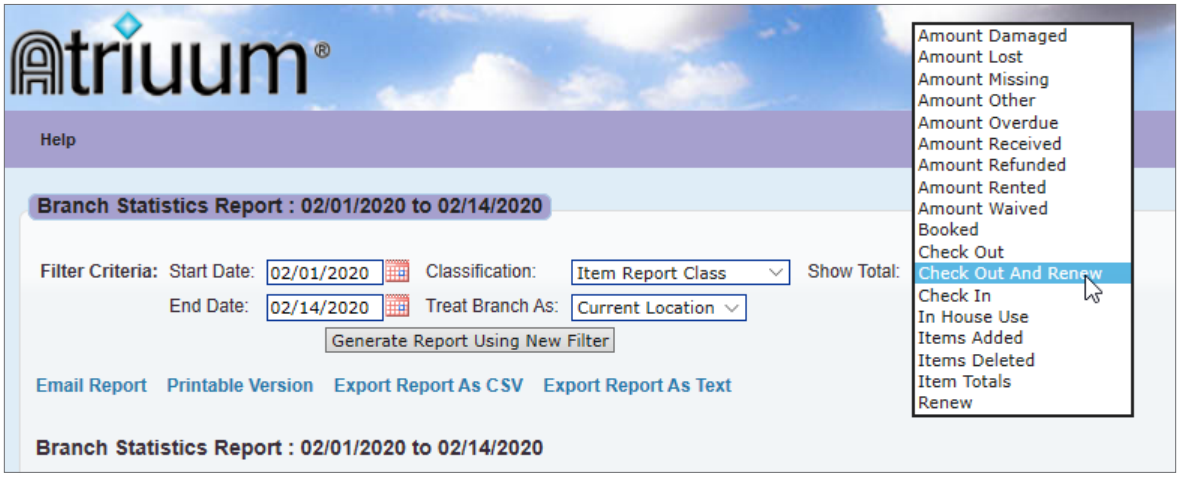


## Circulation Combinations in Branch Statistics (Centralized only)

Depending on your state's reporting requirements, you may include renewals along with check outs in your circulation statistics. You can easily select this option in the **Branch Statistics** report.

**To run a Branch Statistics report**

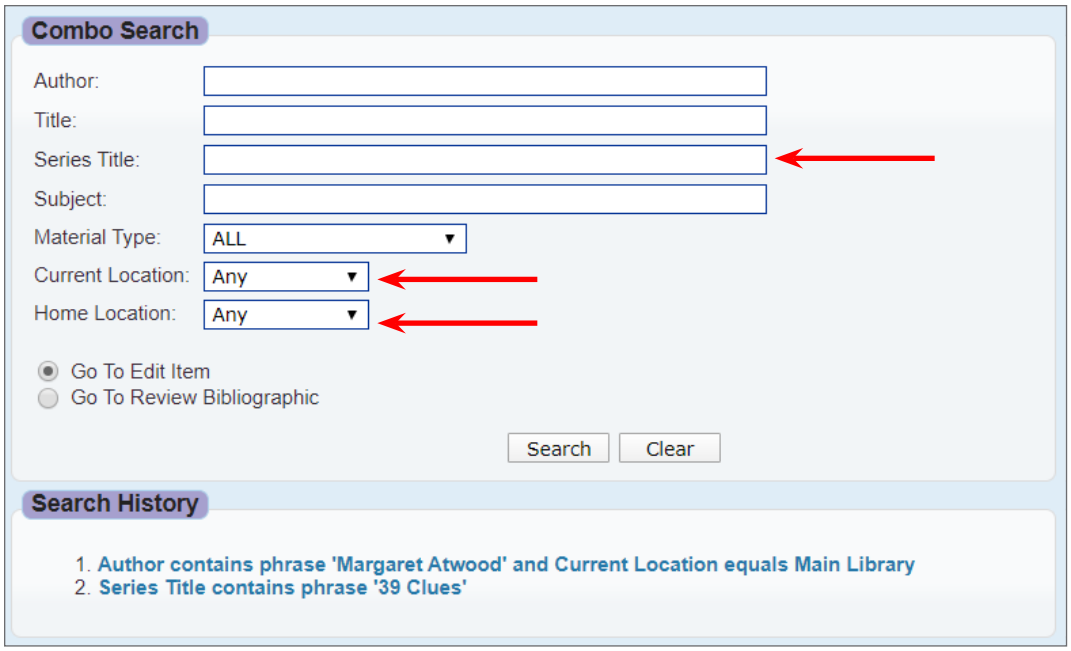
1. Click **Reports** from Atriuum's **Menu Bar**; under **Administration**, click **Statistical Reports**.
2. Click **Branch Statistics Report**.
3. By default, the report shows data from the first of the month through today. Edit the date range or other options as needed.
4. Click the **Show Total:** drop-down button, and click again to select ***Check Out And Renew.***
5. Click **Generate Report Using New Filter**.
6. The report refreshes with updated totals.



# Searching Features

## Combo and Expert Search Enhancements

Combo and Expert searches offer convenient ways to locate items if you don't have the physical item or barcode in front of you. You can combine multiple criteria/use Boolean operators to locate correct items or to limit your results. Recently added options have further enhanced these searches; both forms now offer ways to filter for items based on their current and/or home location. Additionally, the **Combo Search** form allows you to find items via the series title and also displays your recent search history.

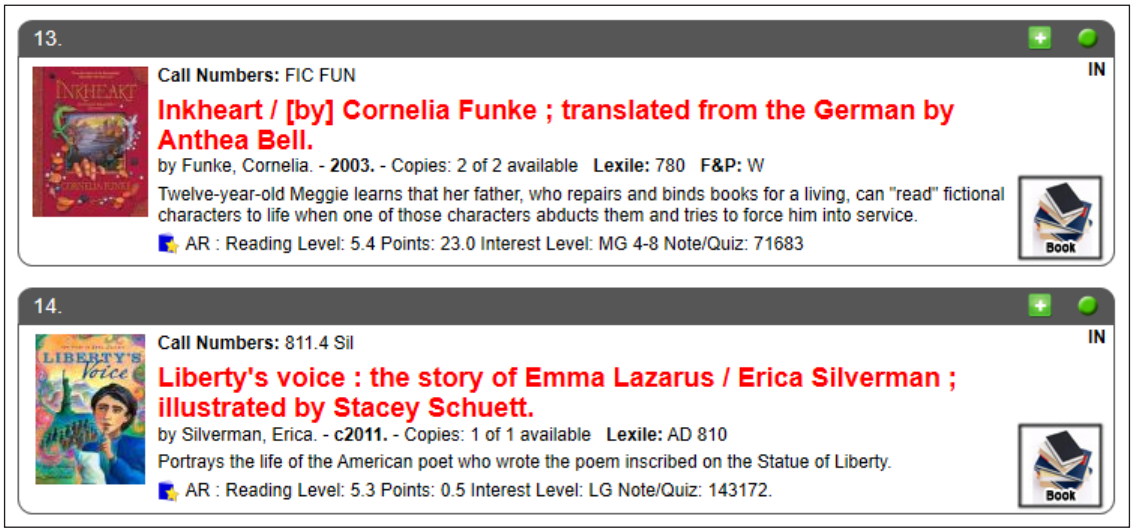



- **Series Title** - locate an item by the title of its series.
- **Current Location (Centralized only)** - select a branch from the drop-down list to filter for items based on where they currently reside.
- **Home Location (Centralized only)** - select a branch from the drop-down list to filter for items based on their ownership.
- **Search History** - the last 10 searches from this session are displayed to repeat previous queries.

# OPAC Features

## Study Program Quiz/Note in Search Results

If your library stores quiz numbers for study programs such as ***Accelerated Reader*** in the **Note/Quiz:** field in Atriuum, you can now display this information in OPAC's **List View** search results. This allows students to quickly locate the associated quiz number.




**To display study program information in OPAC**

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **OPAC**.
2. Click **Searching**.
3. Under *Search Results Options*, next to **Display Study Program Information:**, click **Yes**.
4. Click **Save**.

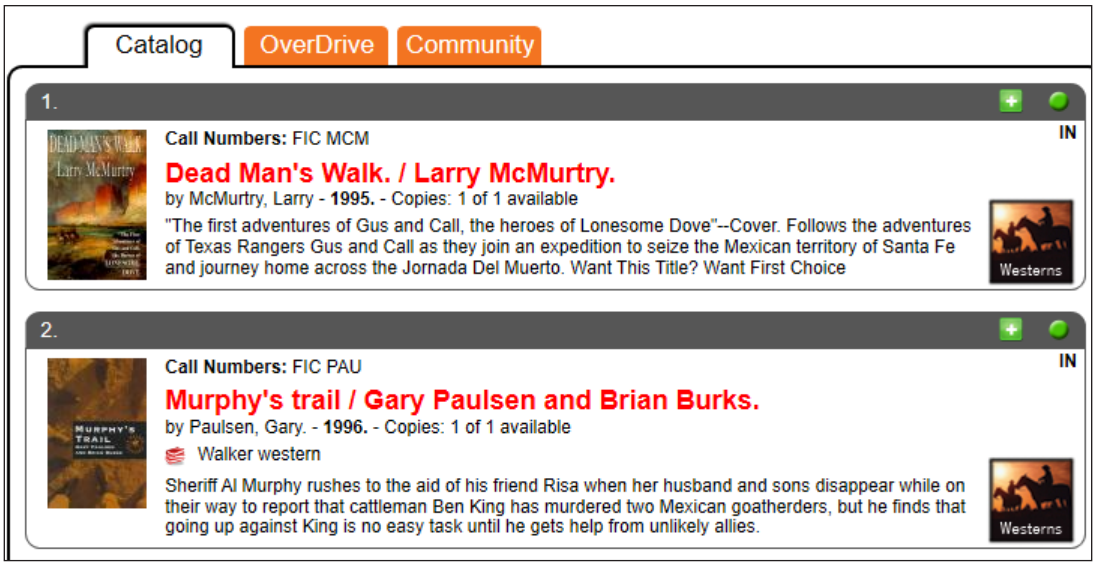
## Genre Media Icons

If your library classifies items into **Material Types** based on genres, you can choose icons to display in librarian and **OPAC** search results. One such example is pictured below.

**To assign a media icon**

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Catalog**.
2. Click **Media Icons**.
3. Click **Edit Images**.
4. In the **Material Type** column, locate the genre category that needs a new icon.
5. Click the first drop-down button under the **Select A File** column, and click again to select an image file from the list.
6. Click **Save Changes**.

The icons display for this material type in OPAC search results (**List View**) and in Atriuum when searching for items.

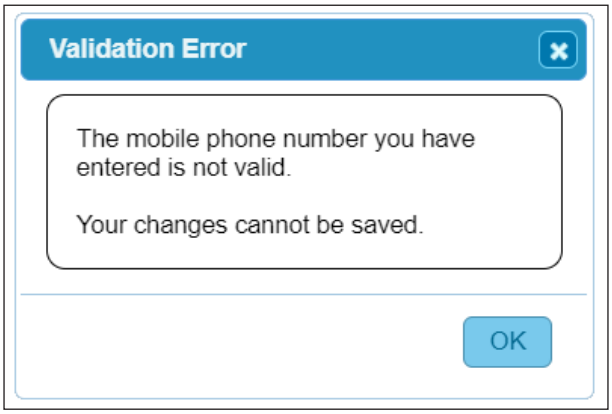


## Field Validation in My Items

If you allow patrons to change their account information using the **Account** tab in **My Items**, Atriuum now checks any changes to verify that information is properly formatted so that incorrect information is not saved.

For example, patrons will see errors if the email address they enter is not in a recognized format or if a phone number contains letters or an incorrect amount of numbers.

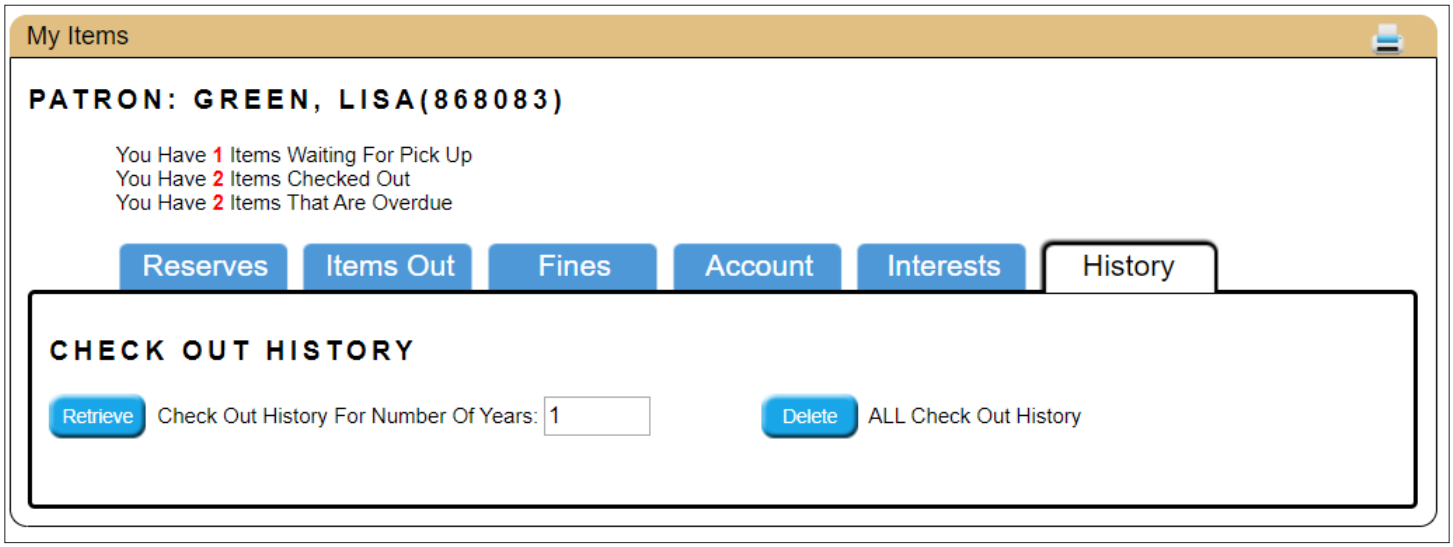
No additional setup is needed.




## More History in My Items

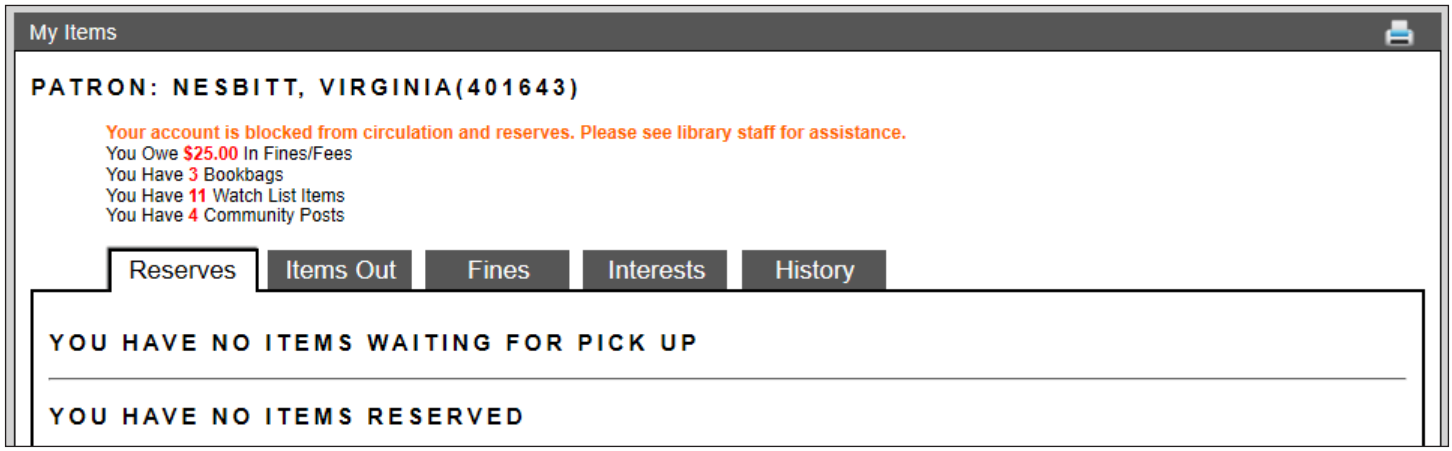
If you allow patrons to view their own check out history using **My Items** in **OPAC**, they now have a choice to determine how far back it goes. Previously, a year of circulation or the most recent 250 items was shown, whichever was larger. Now, patrons can opt to see as much of their history as they choose.

To see check out history, patrons should enter a number of years in the field, and then click **Retrieve**.



## Blocked Circulation Warning in My Items

If patron accounts are not in good standing and are blocked from circulation, patrons will see a warning in **My Items**, informing them that they need to resolve issues with the help of library staff.




**To block or unblock a patron account**

**Note:** This applies to patrons whose accounts have been blocked using the **Add/Edit Patron** form. Patrons may still be restricted from reserving or checking out items if they have exceeded other circulation rules such as excess fines.

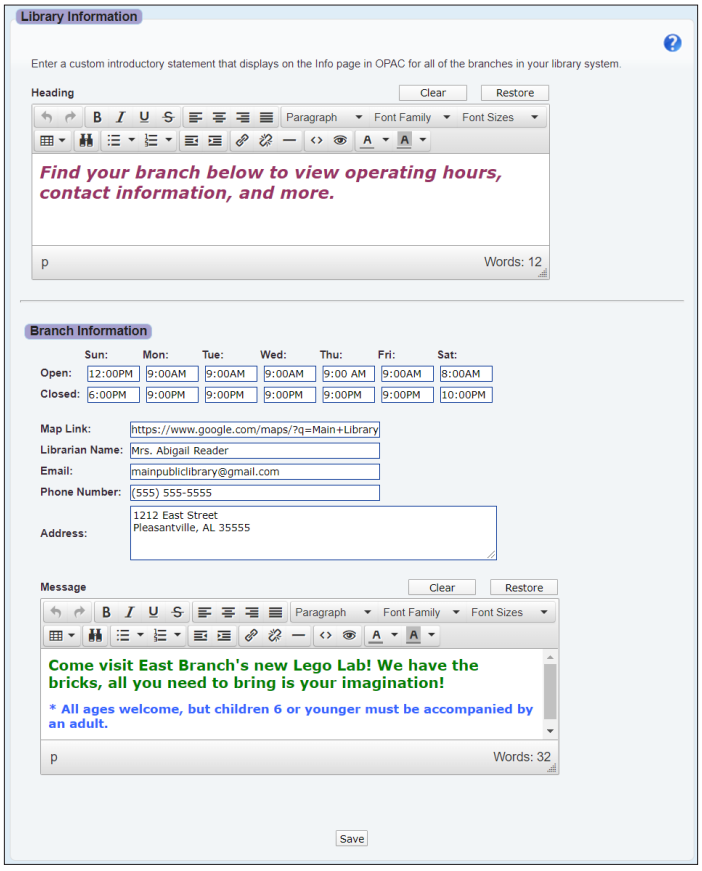
1. Click **Patrons** from Atriuum's **Menu Bar**; under **Patron**, click **Edit**, and search for the patron you need to modify.
2. If the **Block Patron From Circulation:** check box is selected, the patron is currently blocked; if it is deselected, the patron is not blocked.
3. Select or deselect the check box as needed.
4. Click **Save**.

## Library Information Page Redesign

In **OPAC**, you can display your library's hours, contact information, and more for each **Branch** (**Centralized** only) as well as a system-wide introductory statement. The page has been redesigned to clearly indicate which messages are library-wide and which messages are branch-specific.

### To set library information

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **OPAC**.
2. Click **Messages And Information**.
3. Click **Edit Library Information**.
4. In the **Heading** field, enter a system-wide message; use the text editor buttons to style content as needed.
5. In the **Branch Information** fields, enter the hours of operation for the location where you are currently logged on.
6. Include a link to the location of the Branch, librarian name and contact information, and the physical address as needed.
7. In the **Message** field, enter an introduction or important announcement for this Branch; use the text editor buttons to style content as needed.
8. When you are satisfied with your changes, click **Save**.



# ILL Features (Requires License)

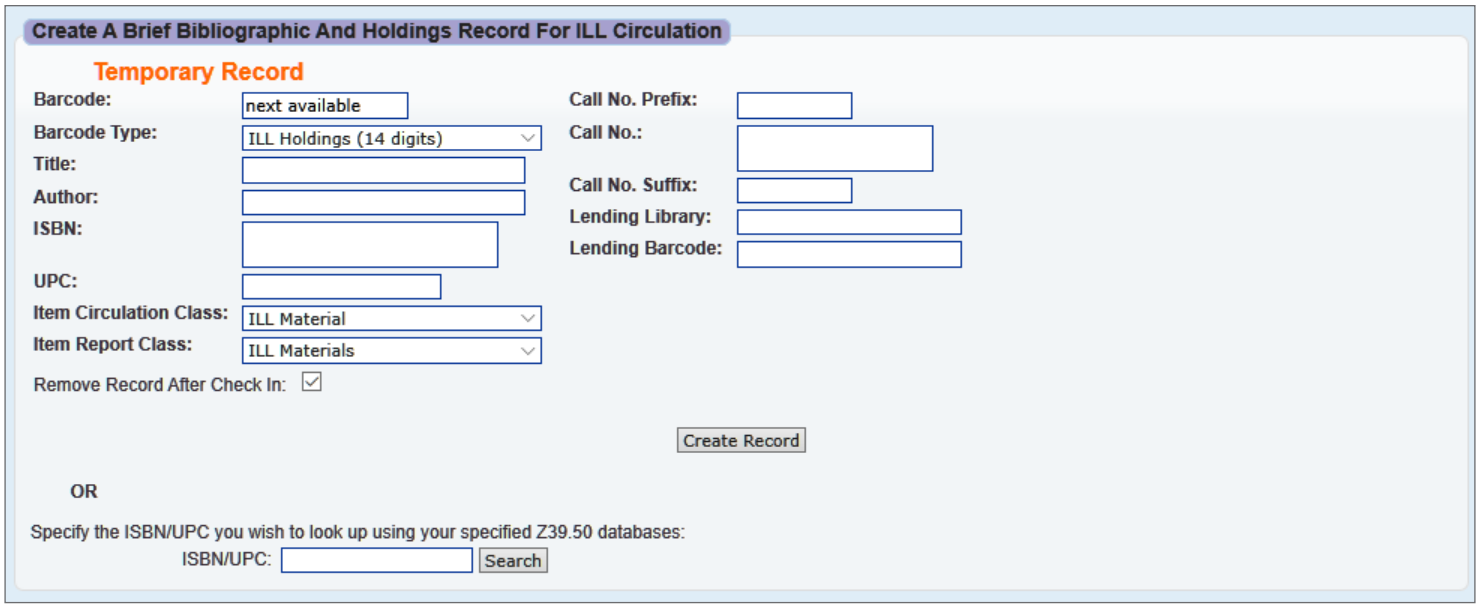
## Inter-Library Loan (ILL) Brief Record Default

Usually, items borrowed using the **ILL** module from other libraries are cataloged as brief records so that their records are deleted when the items are returned. However, you may prefer not to automatically delete these records, for example, if multiple patrons have requested a popular item borrowed from your ILL partner. A setting allows you to determine the default for brief ILL records.

**To choose a default**

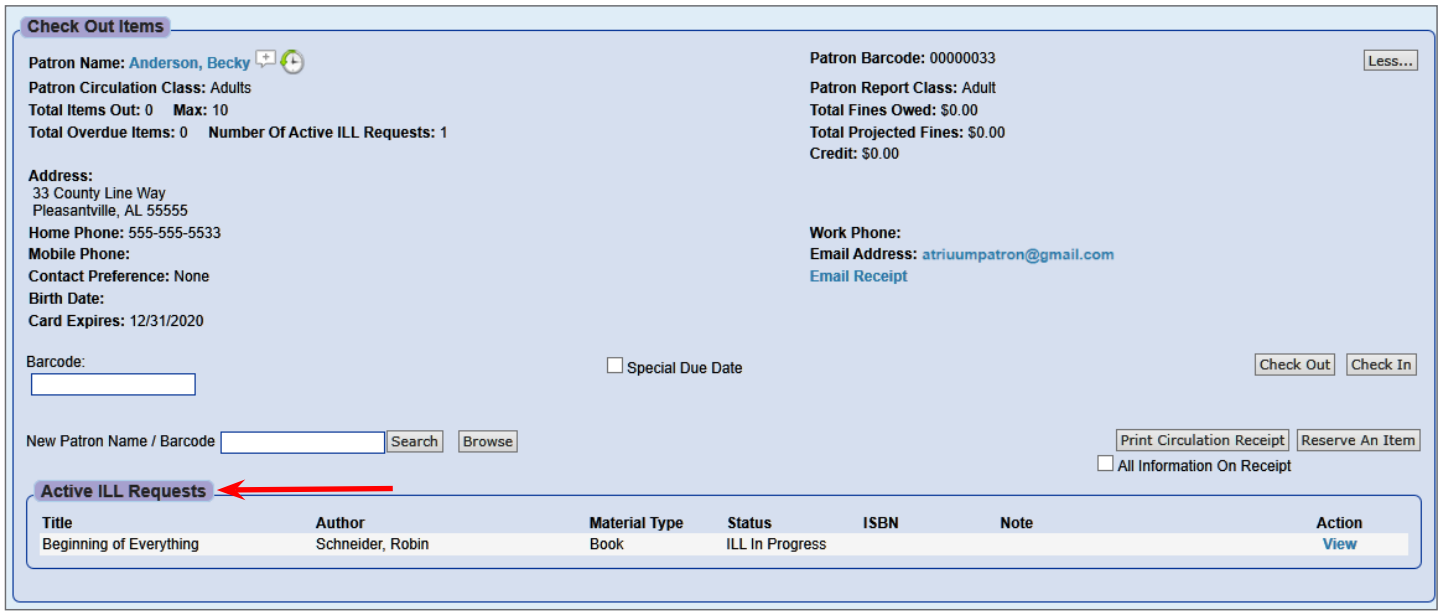
1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Library**.
2. Click **ILL Settings**.
3. Next to **Mark ILL Brief Records As Temporary:**, click **Yes** to mark borrowed items as brief allowing records to be deleted automatically on check in, or click **No** to delete brief records manually.
4. Click **Save**.

The choice you make here determines whether the **Remove Record After Check In:** check box on the form below is selected or deselected when the form opens. You can manually change this for any items as needed.



## Active ILL Requests in Batch Check Out

If you use the **ILL** module, you can see active requests when circulating items for patrons. This allows you to convey the status of patrons' ILL requests while they are at the circulation desk. This information also displays on the **Patron Information** form.



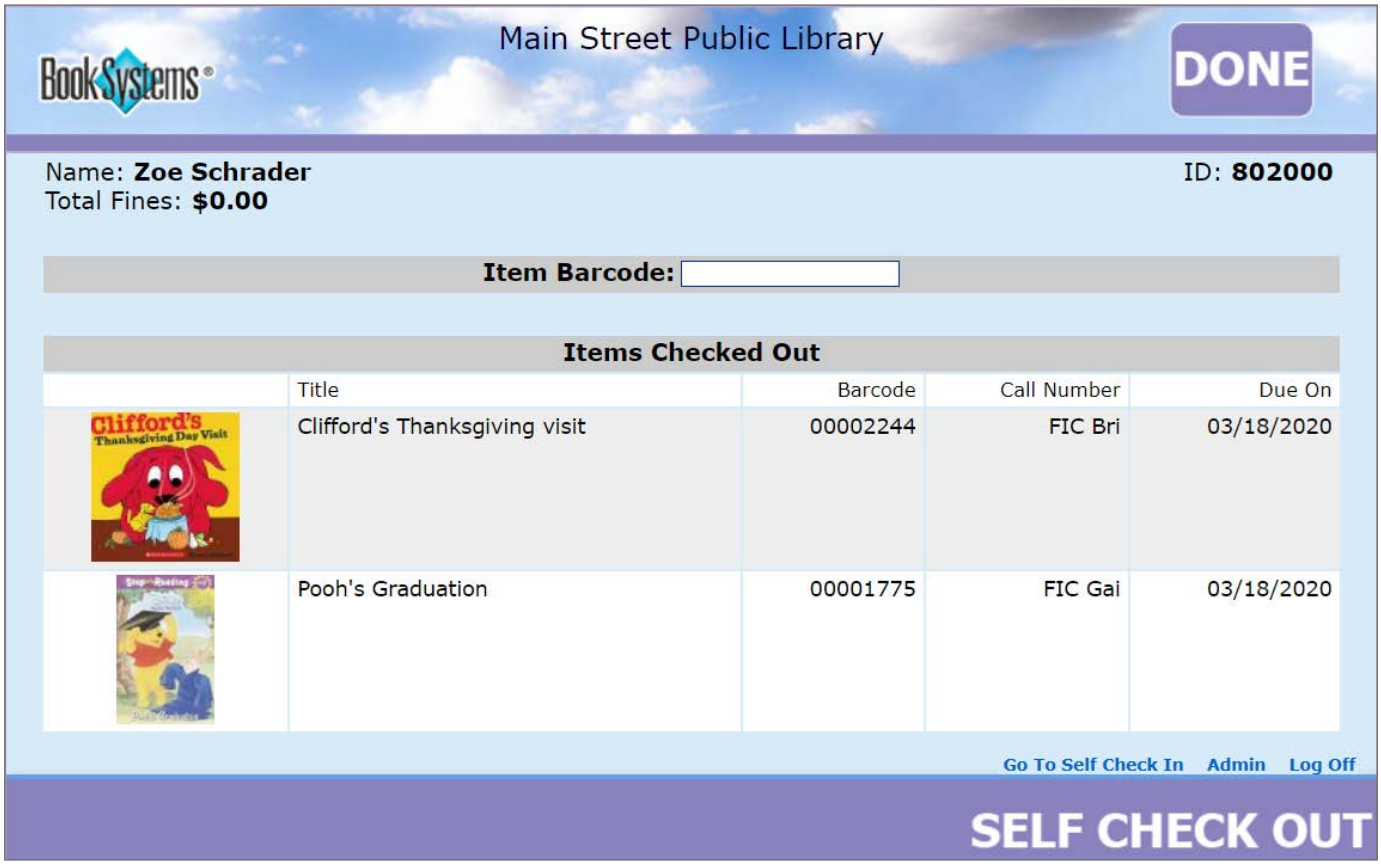
# Self Check Stations (Requires License)

## Dust Jackets in Self Check Stations

If you subscribe to an **OPAC Snapshot** service or upload item dust jackets manually to your database, you can display these images in your **Self Check** interface. This is helpful for assisting younger patrons in identifying their items.

**To enable the setting**

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Circulation**.
2. Click **Circulation Settings**.
3. Under *Self Check Station Settings*, click **Yes** to enable **Display Dust Jackets During Self Check Out/In**.
4. Click **Save**.



## Blocked Circulation Warning in Self Check Stations

If patrons have reached a circulation limit for excess fines or are blocked from circulation (for example, via the check box on the **Add/Edit Patron** form), they will see an error informing them they are blocked before they begin scanning items. No additional setup is required.