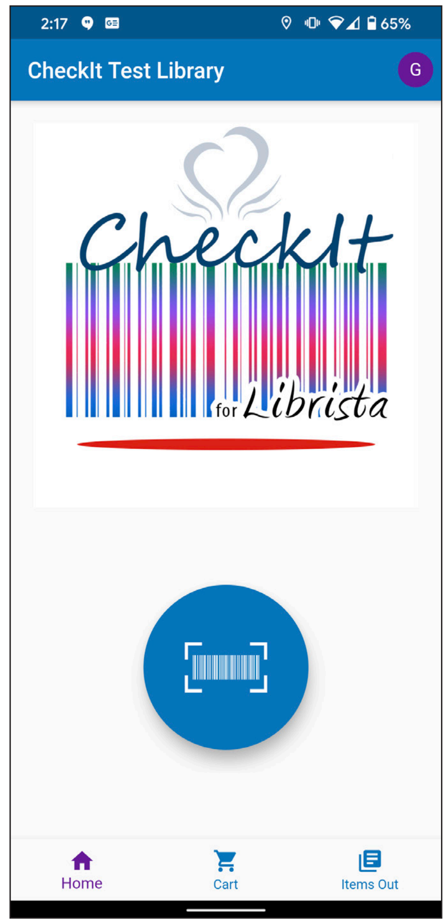
What's New in Atriuum 12.9

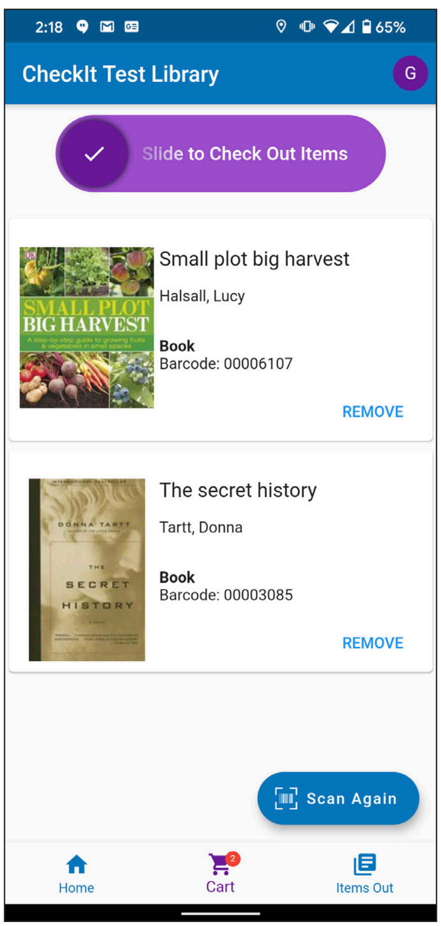
Available Now!

Librista CheckIt (requires license)

This new licensed app from Book Systems puts the power of check out in your patrons' hands. To facilitate social distancing, patrons can use the app to scan items and check them out without staff-patron contact. This app is compatible with supported Apple® iPhone® and iPad® devices and Android™ devices.

To learn more about purchasing a license for this app, contact Book Systems' sales team at (800) 219-6571.



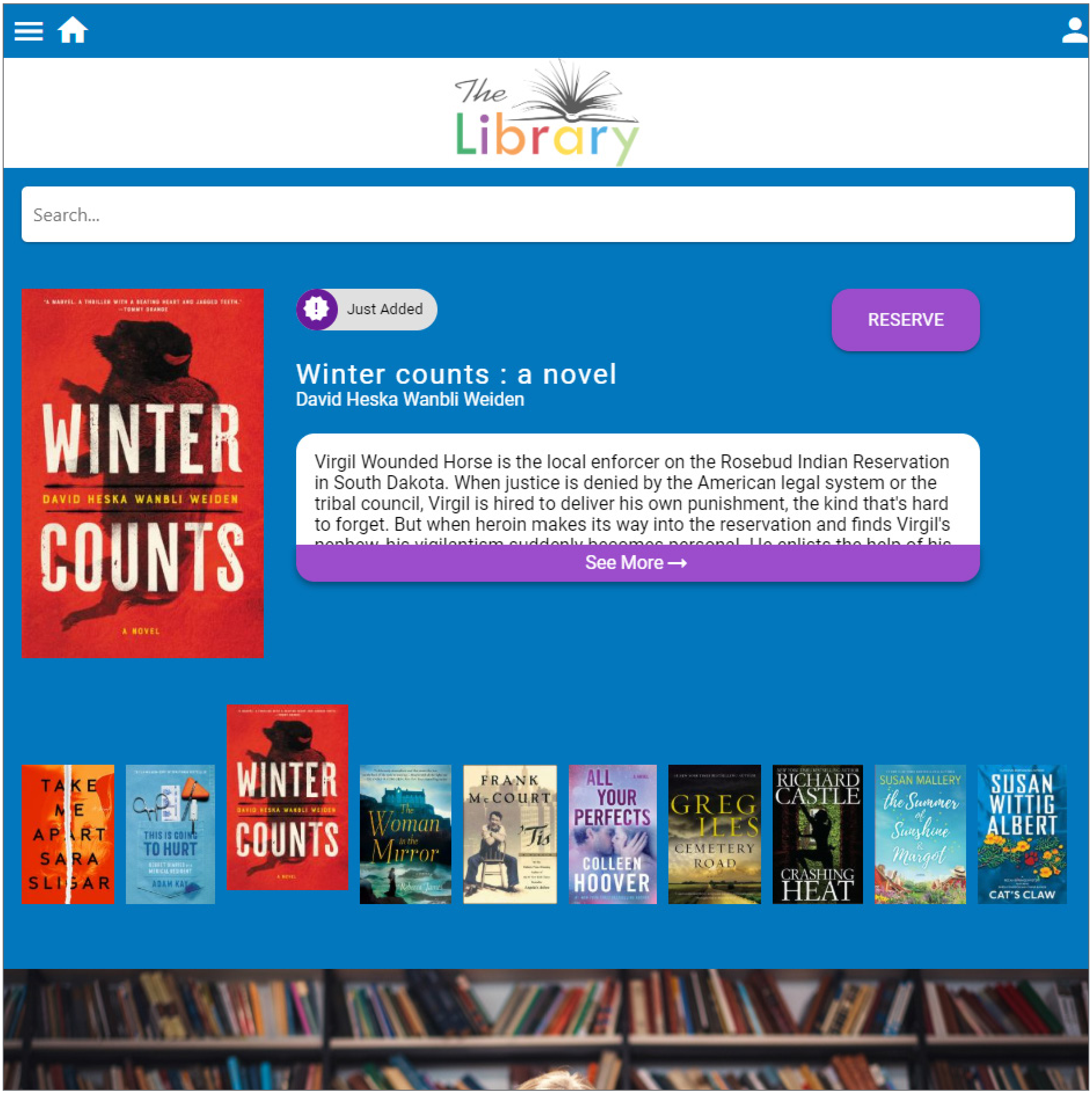


Scan item barcodes with your device camera, then check out items with a slide of your finger!

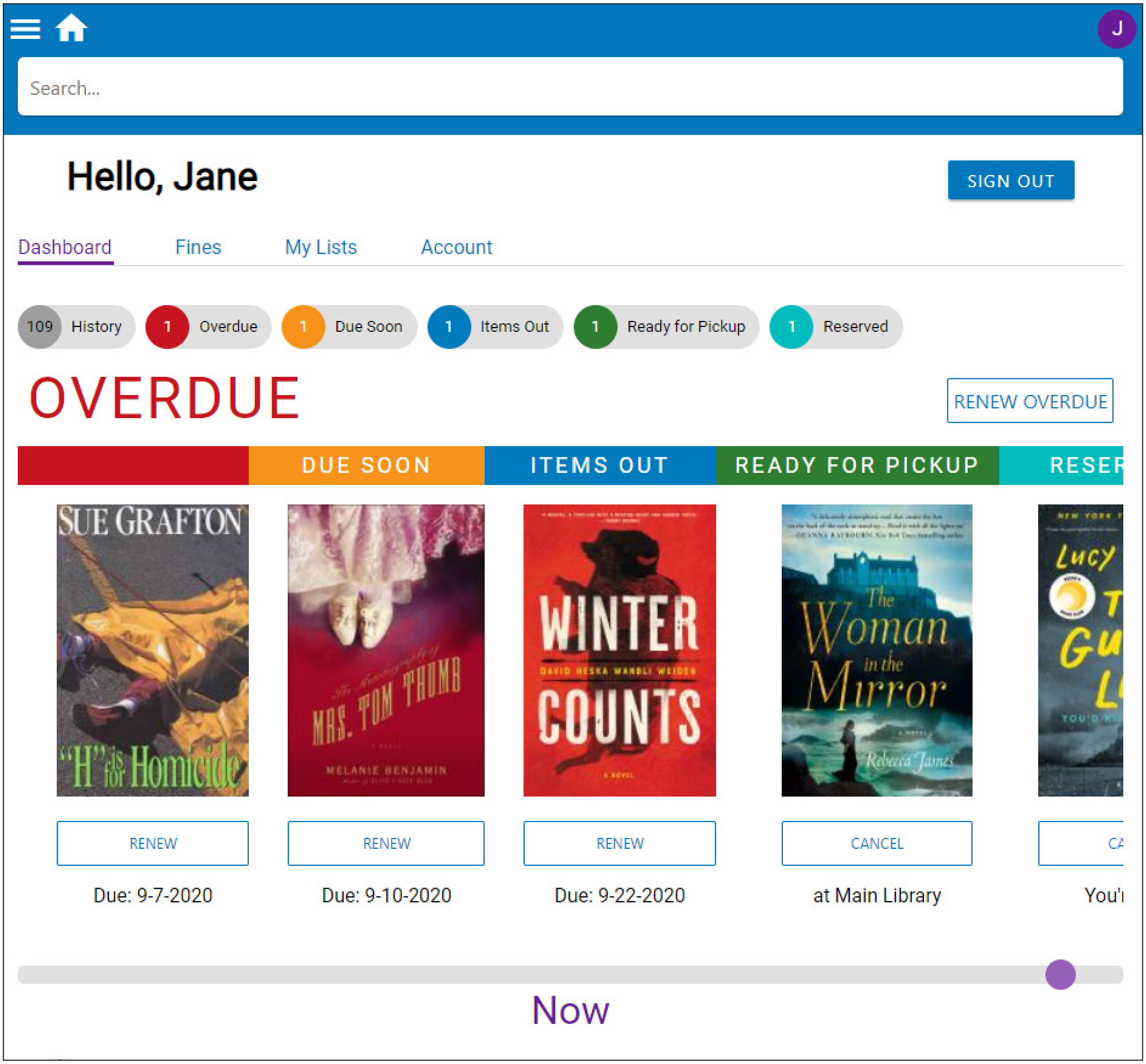
Coming Soon!

Gallery

A curated OPAC experience is the latest cutting edge offering from Book Systems. A sleek, modern interface makes searching and filtering easy for patrons. This option will be available soon at no additional cost!

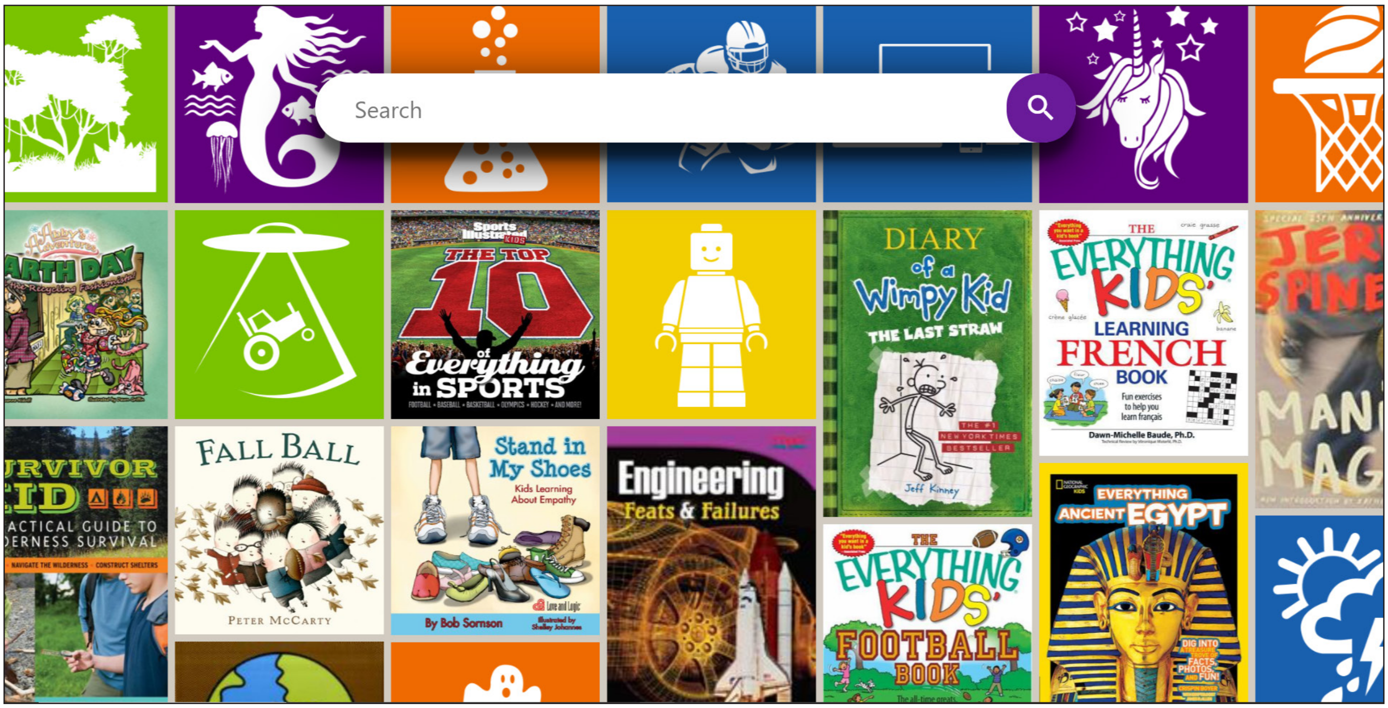


A patron dashboard allows an at-a-glance view for patrons of their account standing, reservations, and circulation history.



Quilt

An interactive Gallery interface for kids terminals is ideal for small hands to use on touch screen devices.



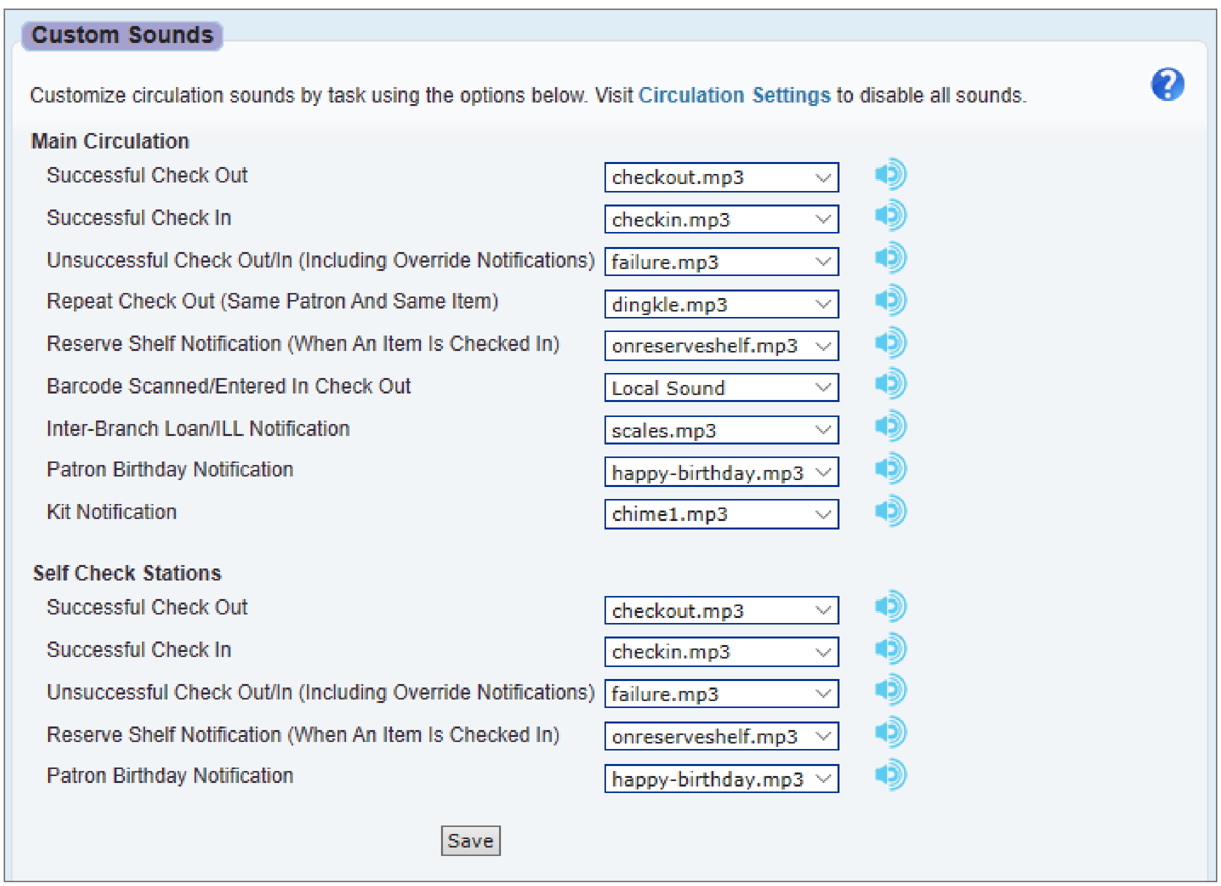
Circulation

Custom Sound for Repeat Check Out

This custom sound alerts staff so they can warn patrons who may be checking out an item they have read before by mistake.

To edit a custom sound for repeat check outs

1. Click **Administration** from Atriuum’s **Menu Bar**, and then click **Library**.
2. Click **Custom Sounds**.
3. Next to **Repeat Check Out (Same Patron And Same Item)**, click the drop-down list, and click again to select a file to play. To use a sound not delivered with Atriuum, click **Upload Local Sound**, locate the file on your machine, and click **Save**. Or, to play no sound in this case, click **None**.
4. To hear a preview of the sound, click .
5. Click **Save** to keep your changes.
6. When a patron checks out an item s/he has checked out before, the selected sound plays (**Circulation Menu** and **Circulation Desk** interfaces).



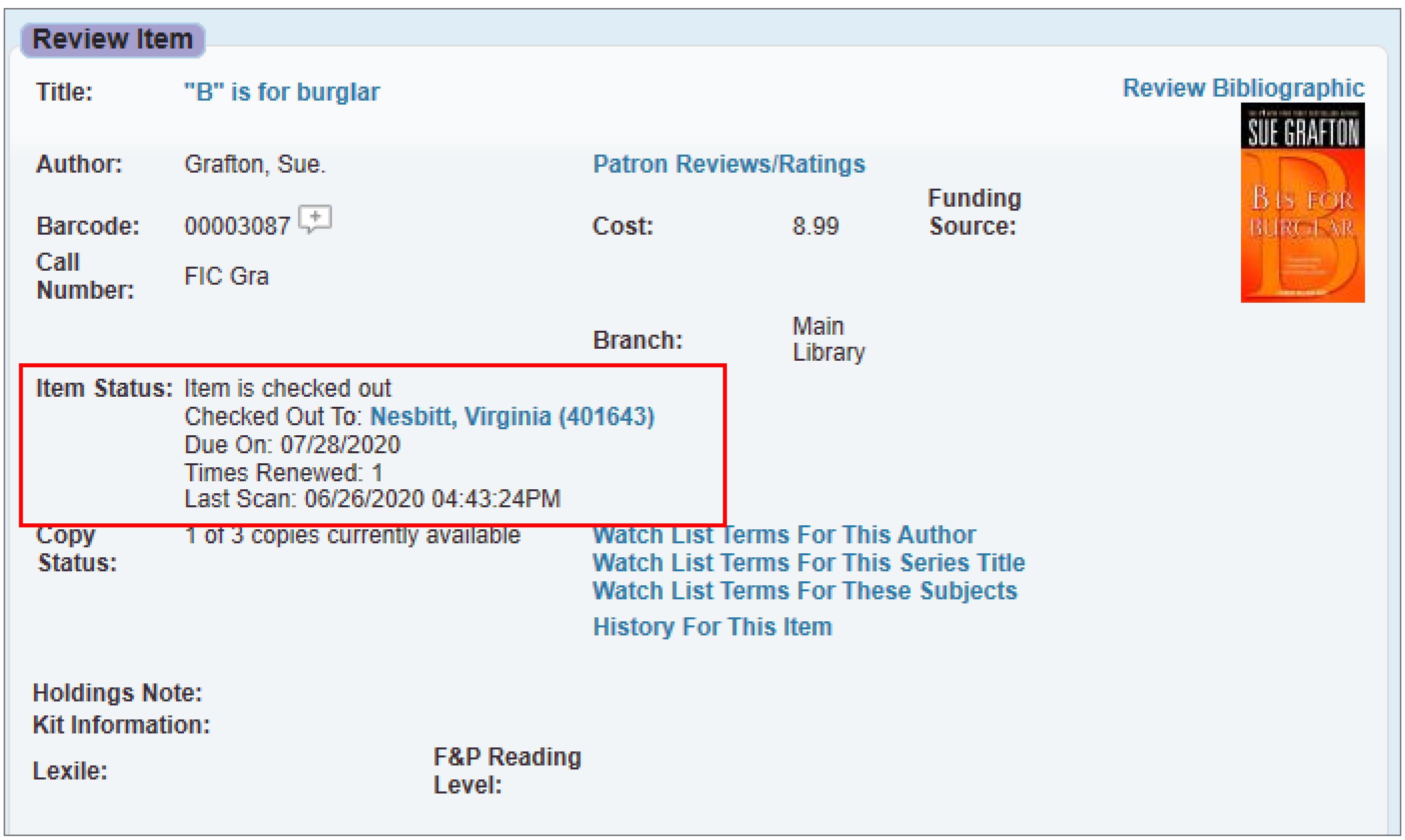
Date of Last Scan on Review Item

Sometimes it’s helpful to see quick information about an item without having to generate a history report. If you need to see when an item was last scanned at the library (for Check In, Check Out, or in-house use), you can view that information on the **Review Item** form.

To see an item’s status

In the **Item Lookup** section of the **Left Column**, enter the item’s title or barcode in the **Review Item:** field, and then click **Lookup**.

In the **Item Status:** field, pertinent information about the copy displays, including the **Last Scan:** date and time.



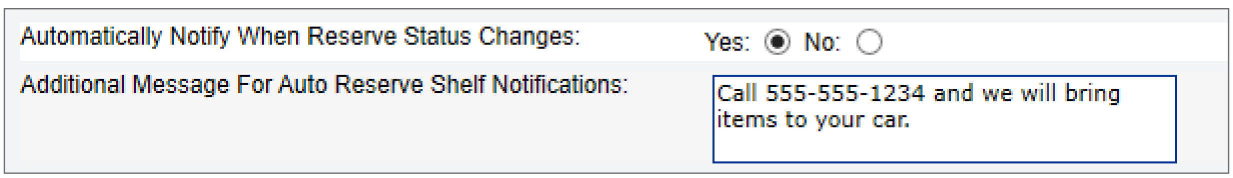
Additional Instructions For Pickup Notifications

If you need to make patrons aware of pickup policies when they receive automatic notifications for reserves, you can add instructions or additional information to be included in these text messages and emails.

To set up automatic notifications

1. Click **Administration** from Atriuum’s **Menu Bar**, and then click **Circulation**.
2. Click **Circulation Settings**.
3. Next to **Automatically Notify When Reserve Status Changes:**, click **Yes**.
4. In the **Additional Message For Auto Reserve Shelf Notifications:** field, enter instructions or details about your pickup procedures.
5. Click **Save**.

This information will be appended to the regular pickup message when automatic notifications are sent.



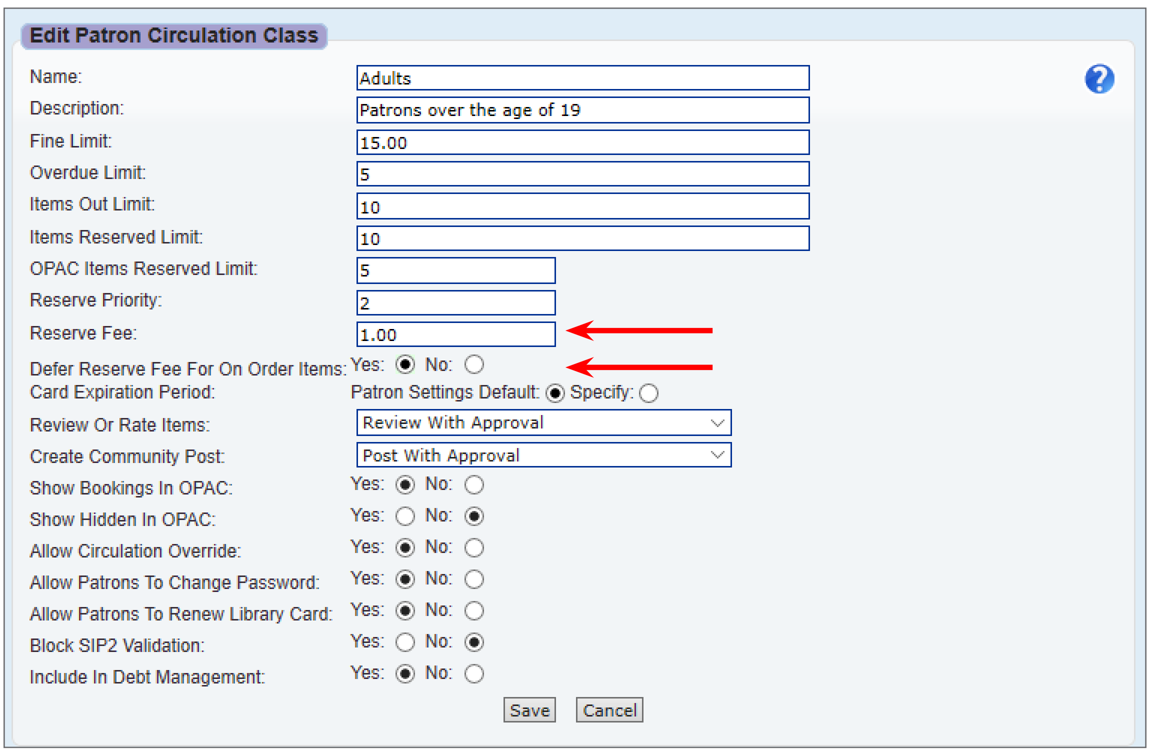
Delaying Reserve Fees For On Order Items

If you allow patrons to reserve items that are On Order but don’t want to charge them reserve fees until the items arrive, you can use this new option on the Patron Circulation Class to delay the charge until the holding becomes active.

When the item’s On Order status is removed and the holding becomes active, the fee is charged to the patron at that time.

To defer Reserve Fees

1. Click **Administration** from Atriuum’s **Menu Bar**, and then click **Patrons**.
2. Click **Patron Circulation Class**.
3. For the class in question, click **Edit** in the **Actions** row.
4. In the **Reserve Fee:** field, modify the amount to charge as needed.
5. Next to **Defer Reserve Fee For On Order Items:**, click **Yes**.
6. Click **Save**.



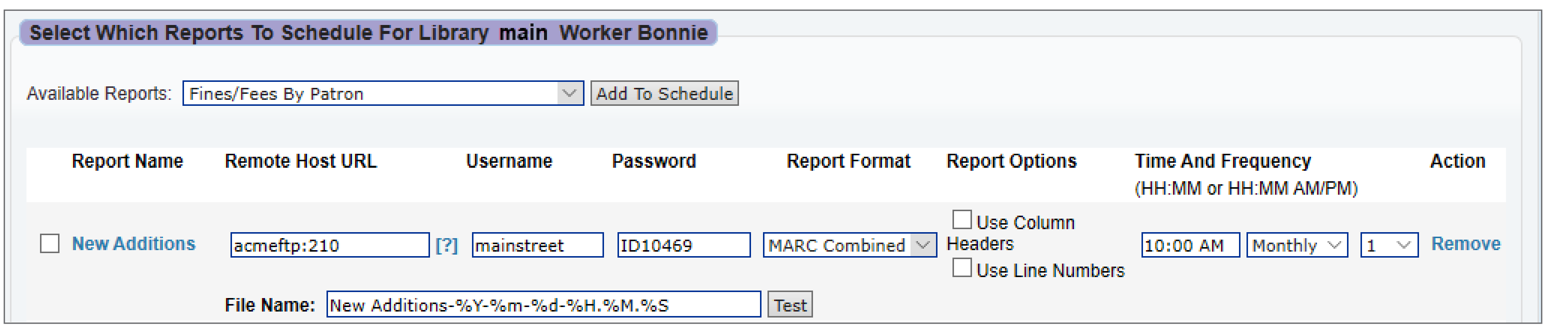
Catalog

New MARC Formats For Scheduled Reports

If you use a service that requires you to upload a report of catalog items to an FTP server regularly, you can schedule reports in the ***MARC Combined*** format to group all holdings information for a title into a single bibliographic record. If you use OCLC, you can schedule reports in the ***OCLC Data*** format to provide the information they need.

To schedule an FTP report

1. Click **Reports** from Atriuum’s **Menu Bar**; under **Utilities**, click **Schedule For FTP**.
2. Click the **Available Reports:** drop-down button, and click again to select the report or template you need to add. Click **Add To Schedule**.
3. In the **Remote Host URL** field, enter the server and port.
4. In the **Username** and **Password** fields, enter the credentials to access the server.
5. Click the **Report Format** drop-down list, and click again to select ***MARC Combined*** or ***OCLC Data***.
6. In the **Report Options** column, click options if needed to format your data.
7. In the **Time And Frequency** column, use the drop-down list(s) and fields to indicate how often to send the report.
8. Click **Save**.



Patrons

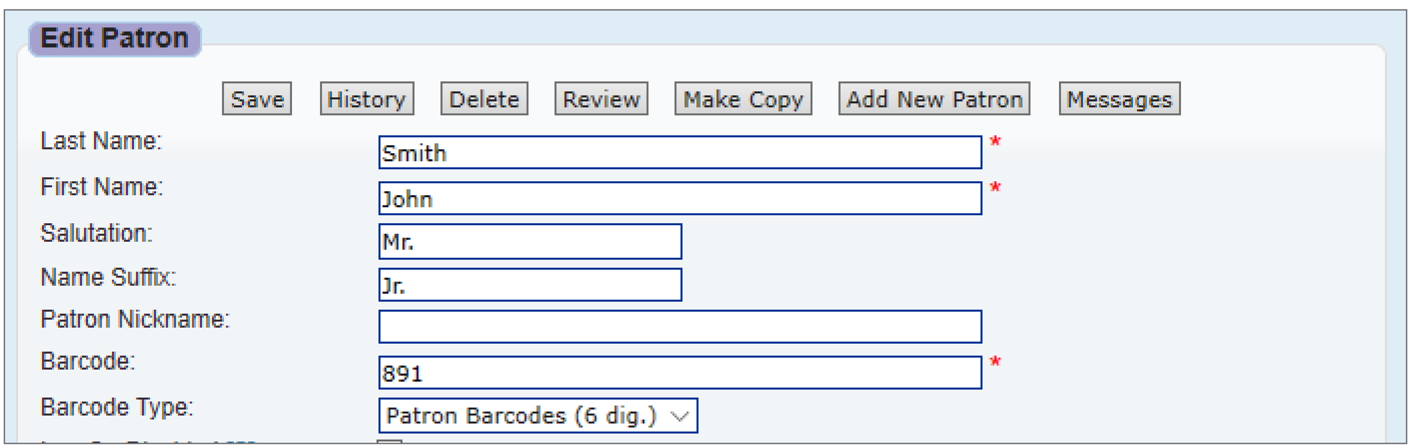
Salutations and Suffixes

If you need further information to identify patrons with similar names, you can include information new fields to add information before or after the patron name. Salutations and suffixes can also be included in customized form letters for a more formal tone.

To edit a patron record

1. Click **Patrons** from Atriuum’s **Menu Bar**, and then click **Edit**.
2. Search for the patron record you want to modify.
3. In the **Salutation:** field, enter the term of address for this patron (Mr., Mrs., Ms. Dr., etc.).
4. In the **Name Suffix:** field, enter the designation to identify the patron (Jr., II, III, etc.)
5. Edit any other information on the patron record.
6. Click **Save**.

Name suffixes display in search results to differentiate between similarly named patrons.



Topaz Signature Pad

If you capture patron signatures for account verification purposes, you can capture and save those images to the patron's record in Atriuum. This feature is designed to work with most models of signature pads sold by Topaz Systems, Inc.™, but you can also manually upload images if you use different signature capture hardware.

To set up the software and browser extension needed for Topaz and Atriuum to communicate, please follow the instructions in your **Topaz User Installation Guide**.

To capture a patron signature using a Topaz Signature Pad

1. Click **Patrons** from Atriuum's **Menu Bar**; under **Patron**, click **Edit**.
2. Search for the patron record you need to modify.
3. In the **Patron Signature** form, click the **Sign** button to initialize the Topaz software.
4. As the patron signs the pad, the signature displays for your approval. Click the green check mark to save or click the eraser to clear the window for another attempt.
5. Click **Save** to attach this signature to the patron record.

To manually upload a signature

1. Click **Patrons** from Atriuum's **Menu Bar**; under **Patron**, click **Edit**.
2. Search for the patron record you need to modify.
3. In the **Patron Signature** form, click **Browse** or **Choose File**, and use the file explorer to locate the image file of the signature.
4. Click **Open** to upload this image to the patron record.
5. Click **Save**.

If a patron has a saved signature, a message displays on the **Patron Information** form so you can quickly confirm there is an image on file.

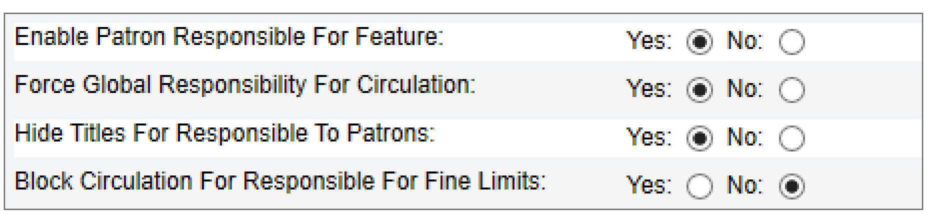
New Patron Responsibility Options

Patrons within a family can be linked together to hold parents or guardians responsible for dependents’ fines. Two new settings allow greater flexibility for deciding when to block responsible parties, as well as increasing privacy for dependents.

Since there are now four settings, the information below provides an overview of all the responsibility settings and how they work together. **Responsible For:** (parent/guardian accounts) and **Responsible To:** (dependent accounts) are still set up the same way on the patron record.

To establish responsibility settings

1. Click **Administration** from Atriuum’s **Menu Bar**, and then click **Patrons**.
2. Click **Patron Settings**.
3. Enable or disable the following settings according to your preferences:
    - **Enable Patron Responsible For Feature:** - this setting enables responsibility connections between patrons. You must enable this setting to use the feature.
    - **Force Global Responsibility For Circulation:** - if this setting is enabled, then if any family member reaches a circulation limit, ALL family members are blocked from circulation until the issue is resolved. If this setting is disabled, only the patron who has reached the limit is blocked.
    - **Hide Titles For Responsible To Patrons:** - if this setting is enabled, dependents’ titles are hidden from the parent/guardian account. Responsible parties will be able to see fine amounts but not titles to protect patron privacy. If this setting is disabled, responsible parties can see all titles in fine details.
    - **Block Circulation For Responsible For Fine Limits:** - If you do NOT enable global responsibility (see above), you can choose to block or allow parents/guardians from circulation when their dependents reach limits. If the setting is enabled, parent accounts will be blocked if a dependent has reached a limit (other dependents can still circulate). If this setting is disabled, other accounts can still circulate. Either way, a warning about the dependent fines displays during check out for both parent and dependent.
4. Click **Save**.



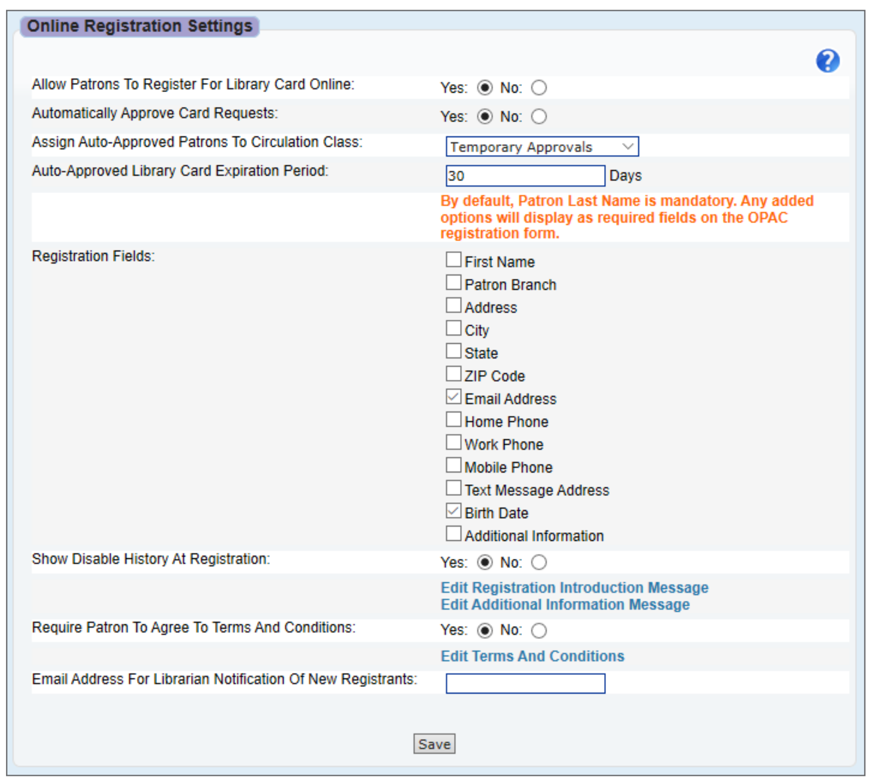
Temporary Approval of Library Cards

If you want to allow patrons access to the library while their registration requests are being processed, you can grant temporary approval that expires after a set time period. Patrons will be granted temporary log on credentials via email to begin using the library right away.

Before beginning the set up below, create a designated Patron Circulation Class with the limited permissions you would like to grant for temporary cards.

To set up temporary cards

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **OPAC**.
2. Click General And Patron Account Settings.
3. In the *My Items Settings* section, click Edit Settings next to **Allow Patrons To Register For Library Cards:**.
4. Next to **Allow Patrons To Register For Library Card Online:**, click **Yes** to enable the online registration feature.
5. Next to **Automatically Approve Card Requests:**, click **Yes**.
6. Next to **Assign Auto-Approved Patrons To Circulation Class:**, click the drop-down button, and click again to select your class for temporary patrons.
7. In the **Auto-Approved Library Card Expiration Period:** field, enter a number of days until temporary library cards expire. The default is ***"30."***
8. In the **Registration Fields:** list, click the check box for **Email Address** to require patrons to provide an address so that they can receive temporary log on credentials; enable any other required fields as needed.
9. Click **Save**.



If you want to provide instructions to applicants during registration, you can edit the registration introduction or additional information using the links.

Tip! Because these patron requests have been automatically approved, they will not display in the **Requests For Library Card** report. To see which patrons are temporary, run a **Patron List** report and filter by Patron Circulation Class.

Reports

Reserve Statistics

New reports are available to provide detailed information about your library's reserve statistics. You can view statistics by Age Group, Item Circulation Class, Item Report Class, Material Type, Physical Location, Pickup Location, and Report Class Grouping. In each of these new reports, you can see the following information:

- Reserves - the total number of reservations that were placed.
- Checked Out - the number of items checked out to patrons who reserved them.
- Cancelled - the number of reserves that were cancelled by patrons or could not be fulfilled.
- Patron Created - the number of reserves placed by patrons using OPAC or Librista.
- Librarian Created - the number of reserves placed by staff using Atriuum.
- Required Transfer (**Centralized** only) - the number of items that needed to be sent to another location to fulfill a reserve.

To view the Reserves By Material Type report

1. Click **Reports** from Atriuum's **Menu Bar**; under **Administration**, click **Statistical Reports**.
2. Click **Reserves By Material Type**.
3. The report displays all the relevant statistics.
4. If needed adjust the date range or location type (**Centralized** only), and click **Generate Report Using New Filter**.
5. You can export, print, or email the report like any other statistical report.

OPAC

Watch Lists

Atriuum allows patrons logged on to **OPAC** to select authors, series, or subjects to be notified about when matching items are added to your collection. You can choose to enable or disable Watch List options for your library.

To change the setting

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **OPAC**.
2. Click **General And Patron Account Settings**.
3. In the *Basic Settings* section, next to **Enable Watch Lists**, click **Yes** to allow patrons to create watch lists, or click **No** to hide this feature.
4. Click **Save**.

Watch Lists Privacy

If you want certain staff to be able to see what watch list terms have been created and by which patrons, you can enable the **Manage Patron Data In Watch Lists Reports** permission. Staff without this permission will be able to see created terms for determining purchasing decisions, but they will not be able to see which patrons are attached to the terms.

To enable the permission

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Library**.
2. Click **Worker Records**.
3. In the **List Of Workers**, click **[Edit]** next to the worker you need to modify.
4. Under *Supervisor Permissions*, click the check box next to **Manage Patron Data In Watch Lists Reports**.
5. Click **Save**.

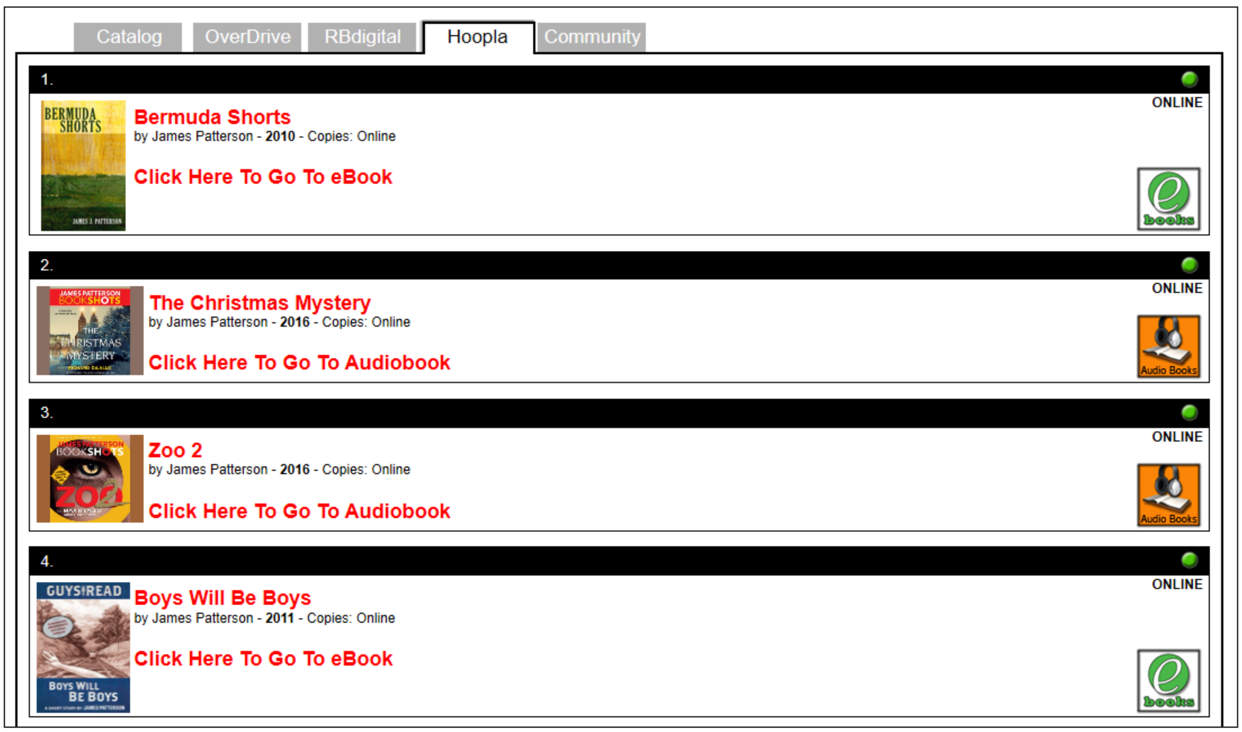
Hoopla in OPAC

If your library subscribes to this third-party provider of eResources, search results for those items can be viewed in **OPAC**.

To enable Hoopla

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **OPAC**.
2. Click **Add Ons**.
3. In the *Hoopla* section of the **Digital Resources** form, click **Yes** to enable this service.
4. In the **Library ID:** field, enter the identifier given to you by Hoopla.
5. The **Display Only Child-Friendly Content In Main View (Not KidZviZ):** setting limits results to age-appropriate results; click **Yes** to enable this option, or leave it set to **No** to show results for all ages.
6. Click **Save**.

When performing a search in **OPAC**, click the **Hoopla** tab to view results from this service.

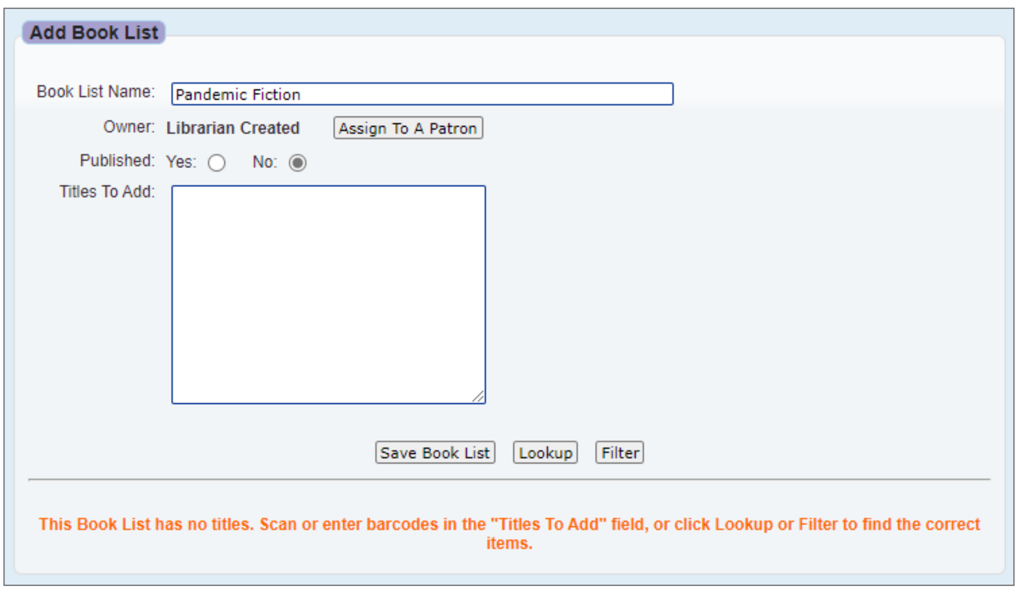


Librarian Book Lists

Patrons can create bookbags of items for personal use or (with permission) publish lists of recommendations for other patrons to see in **OPAC**. Now, this powerful feature is accessible on the librarian side of Atriuum. Use this option to create themed lists and promote circulation. You can also use this interface to help create or edit book lists for teachers or patrons who need additional assistance.

To add a book list

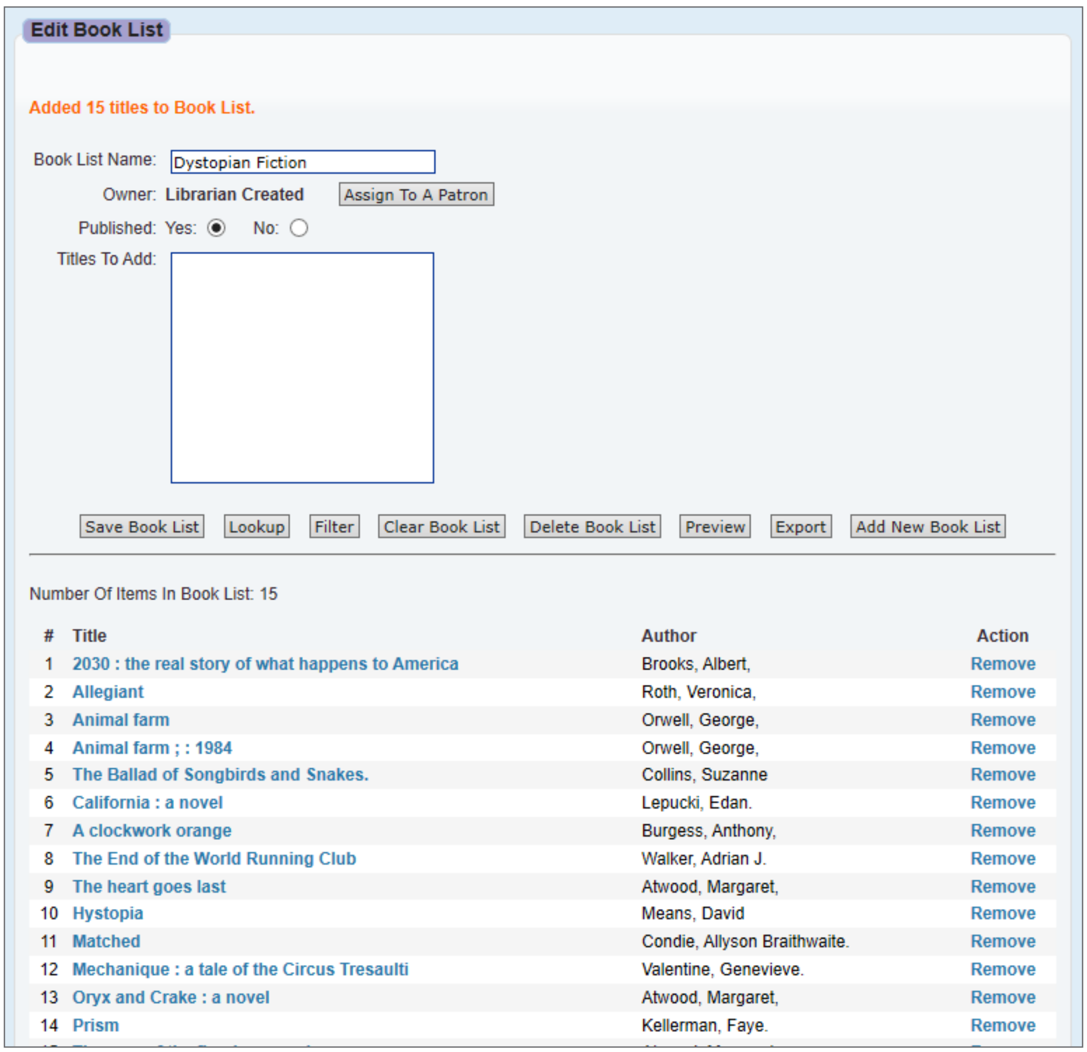
1. Click **Patrons** from Atriuum's **Menu Bar**; under **Book Lists**, click **Add**.
2. Enter a name or description of this list in the **Book List Name:** field.
3. By default, lists made on this form are designated as ***Librarian Created***. To attach this list to a patron account, click **Assign To A Patron**, and search for the patron you want to be connected to this list.
4. Next to **Published:** click **Yes** to display this list in **OPAC**; otherwise, click **No** to hide an incomplete or seasonal list from **OPAC**.
5. In the **Titles To Add:** field, scan or enter barcodes to add the associated bibliographic records to the list. Use the **Lookup** or **Filter** options to search for a single item or to use a Report Wizard to find more items.



6. Click **Save Book List**.
7. Other options for managing this book list are described below:
   - **Clear Book List** - displays the total number or items in this list. Click it to empty the list and start again.
   - **Delete Book List** - completely removes this book list.
   - **Preview** - opens the book list in **OPAC** so you can see how it displays for patrons.
   - **Export** - displays the book list in a report format for printing or exporting in CVS or txt format.

To edit a Book List

1. Click **Patrons** from Atriuum's **Menu Bar**; under **Book Lists**, click **Manage**.
2. Enter the name of the Book List or the patron it belongs to (not applicable for Librarian Created lists), and search for the list you want to modify.
3. On the **Edit Book List** form, use the following options as needed:
   - To add more titles, scan or enter barcodes in the **Titles To Add:** field, or use the **Lookup** or **Filter** options to search for a single item or to use a Report Wizard to find more items.
   - **Clear Book List** - displays the total number or items in this list. Click it to empty the list and start again.
   - **Delete Book List** - completely removes this book list.
   - **Preview** - opens the book list in **OPAC** so you can see how it displays for patrons.
   - **Export** - displays the book list in a report format for printing or exporting in CVS or txt format.
4. If you make changes to the contents of the list, click **Save Book List** to keep your changes.



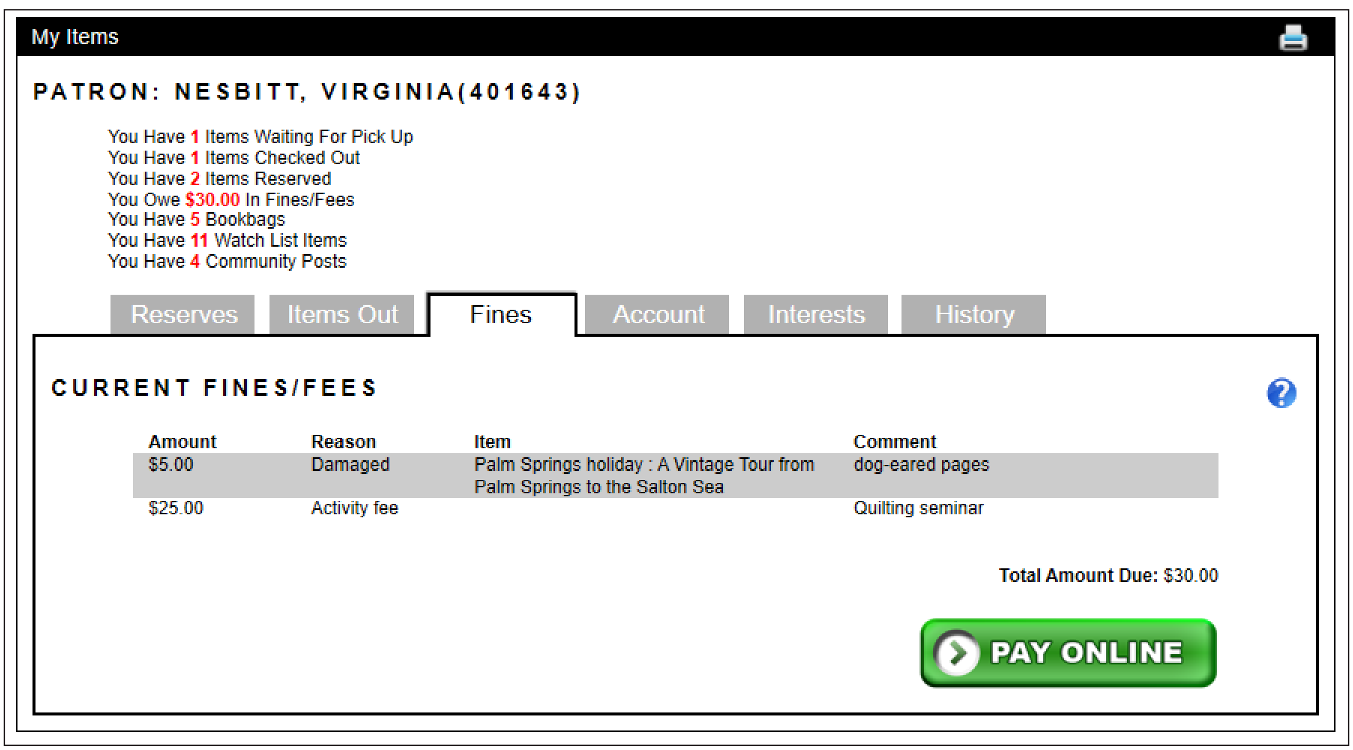
Comprise SmartPAY

If you have an account with this third-party service, you can allow patrons to pay fines and fees electronically through **My Items** in **OPAC**.

To set up Comprise SmartPAY

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **OPAC**.
2. Click **Add Ons**.
3. In the **Other** form, under **SmartPay**, next to **Enable Pay Fines With SmartPAY:**, click **Yes**.
4. In the **Account ID:** field, enter the identification number provided to you by Comprise.
5. In the **Location ID:** field, enter the identification number provided to you by Comprise.
6. In the **Account Username:** field, enter the username provided to you by Comprise.
7. In the **Account Password:** field, enter the password provided to you by Comprise.
8. In the **Receiver Email Address For Notifications:** field, enter an email address to receive notifications of transaction errors.
9. In the **Minimum Fine Amount To Pay With SmartPAY:** field, enter the minimum amount for online payments. If the patron's fines are below this amount, the option to pay online will be hidden.
10. Click **Save**.

In **OPAC**, patrons will see a **Pay Online** button. They can click to be redirected to the SmartPAY site where they can securely enter credit card information. They will be redirected to **OPAC** after the transaction.

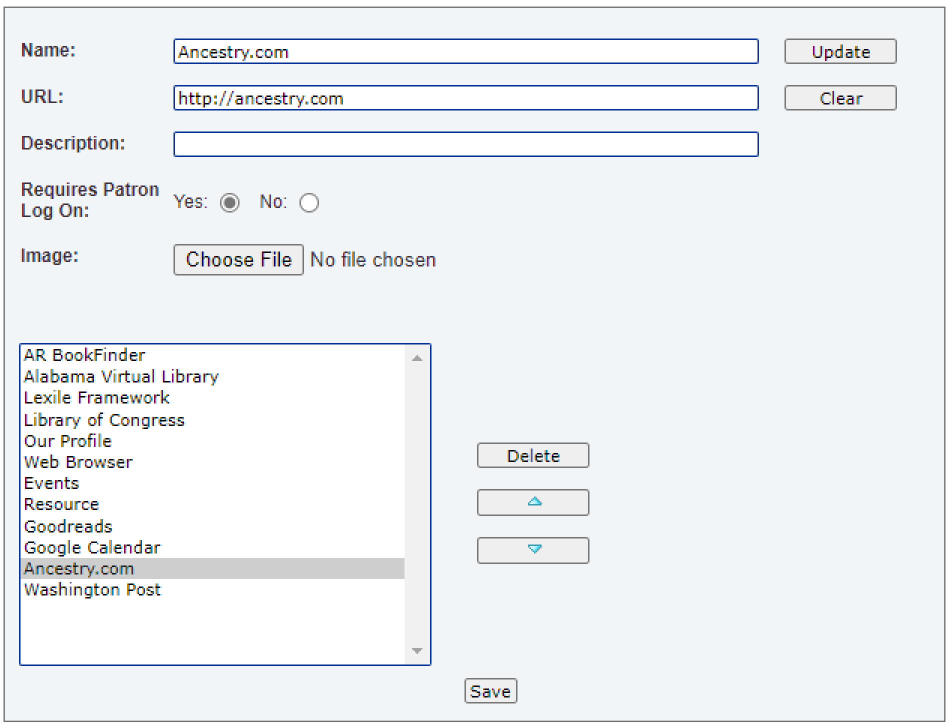


Require Log On to Access Custom Links

If you need patrons to log on with their library credentials to access certain websites, you can require this for resources that display in the **Links** tab or **Links** widget.

To require log on for a link

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **OPAC**.
2. Click **Messages And Information**.
3. Click **Add/Edit Custom Links**.
4. In the list of websites, click the link you need to modify.
5. Edit the name, URL, description, or image as needed.
6. Next to **Requires Patron Log On:**, click **Yes**.
7. Click **Update**.



When patrons click this link in OPAC, they will be prompted to enter their My Items username and password to access the linked website.

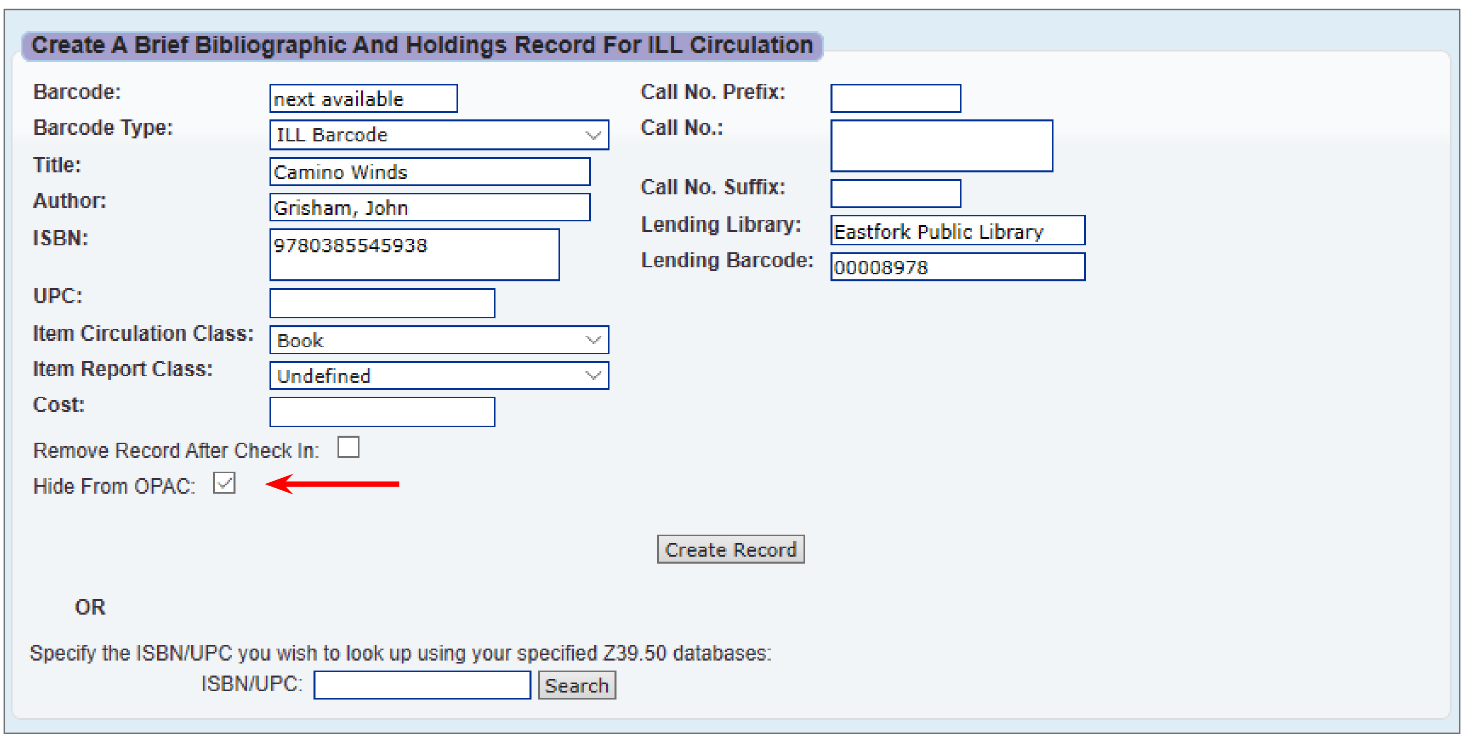
ILL (requires license)

ILL non-temporary records

Atriuum's Interlibrary Loan module offers many options to customize your workflow. For example, you can choose to make ILL brief records temporary or not temporary. Temporary items are automatically deleted on check in. If you prefer to manually remove ILL records, you can still hide these items from **OPAC** during circulation to prevent patrons from seeing them.

To manage non-temporary ILL brief records

1. Click **ILL** from Atriuum's **Menu Bar**; under **Borrowing**, click **Receive Item**.
2. The **Create A Brief Bibliographic And Holdings Record For ILL Circulation displays**. You may see a **warning** message indicating this record is temporary.
3. Enter barcode information, item information, and information about the lending library as needed.
4. Click to deselect the **Remove Record After Check In:** check box to make this item non-temporary.
5. The **Hide From OPAC:** check box displays; it is enabled by default.
6. To keep this ILL item from showing in **OPAC**, leave this check box selected; to display it in **OPAC**, click to deselect the check box.
7. Click **Create Record**.


Create A Brief Bibliographic And Holdings Record For ILL Circulation
Barcode: next available
Barcode Type: ILL Barcode
Title: Camino Winds
Author: Grisham, John
ISBN: 9780385545938
UPC:
Item Circulation Class: Book
Item Report Class: Undefined
Cost:
Remove Record After Check In:
Hide From OPAC:
Call No. Prefix:
Call No.:
Call No. Suffix:
Lending Library: Eastfork Public Library
Lending Barcode: 00008978
Create Record
OR
Specify the ISBN/UPC you wish to look up using your specified Z39.50 databases:
ISBN/UPC: Search

Auto-Reserve ILL Item to Patron

When an item comes in from a lending library and a brief record is created and linked to the request, a reserve is automatically created for the requesting patron. When the item is placed on the Reserve Shelf in Atriuum, reserve pickup notifications will be sent according to your library's settings.

This feature requires no setup.

To create a brief record and link a patron request

1. Click **ILL** from Atrium's **Menu Bar**; under **Borrowing**, click **Receive Item**.
2. Enter information about the item you received from the lending library as needed in the fields, and click **Create Record**.
3. Click **Link Patron ILL Request**. Atriuum searches for matching patron requests. Click the request **title**.
4. The brief record is linked to the patron request, and the item is automatically reserved for the patron.

The **Comment:** in **Reserve Details** includes a message indicating this was an automatic reserve.

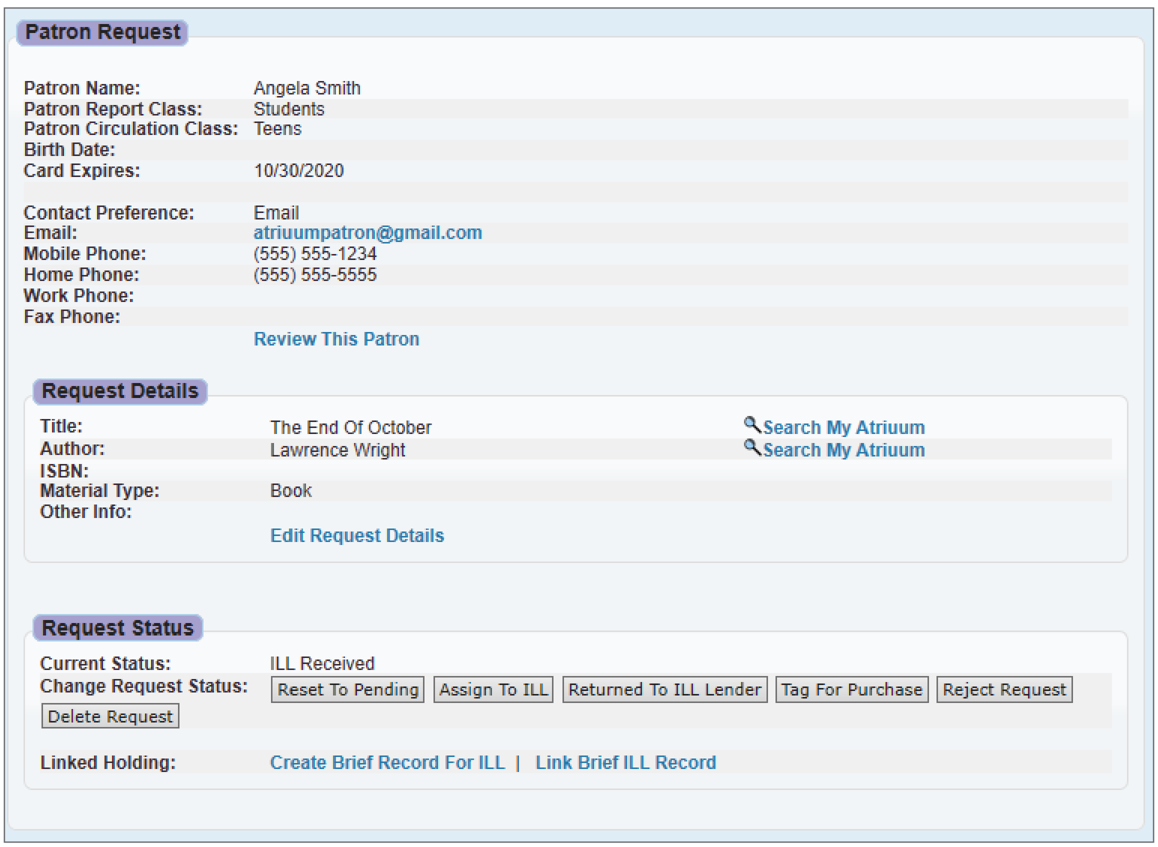
Returned To ILL

If you would like to keep a record of when items are returned to the lending library in case of disputes, you can update item status to indicate that the items have been sent back.

This status does not apply to temporary records, which are automatically deleted on Check In.

To update a request's status

1. Click **ILL** from Atriuum's **Menu Bar**; under **Borrowing**, click **Review Request**.
2. Search for the request you need to modify.
3. Click **Returned To ILL Lender**.
4. The **Current Status** is updated and also displays the date the item was marked returned.
5. When the lending library has confirmed receipt of the item, return here and click **Delete Request** to permanently remove it from your database (see next page).



Patron Request

Patron Name:	Angela Smith
Patron Report Class:	Students
Patron Circulation Class:	Teens
Birth Date:	
Card Expires:	10/30/2020
Contact Preference:	Email
Email:	atriuumpatron@gmail.com
Mobile Phone:	(555) 555-1234
Home Phone:	(555) 555-5555
Work Phone:	
Fax Phone:	
	Review This Patron

Request Details

Title:	The End Of October	Search My Atriuum
Author:	Lawrence Wright	Search My Atriuum
ISBN:		
Material Type:	Book	
Other Info:		
	Edit Request Details	

Request Status

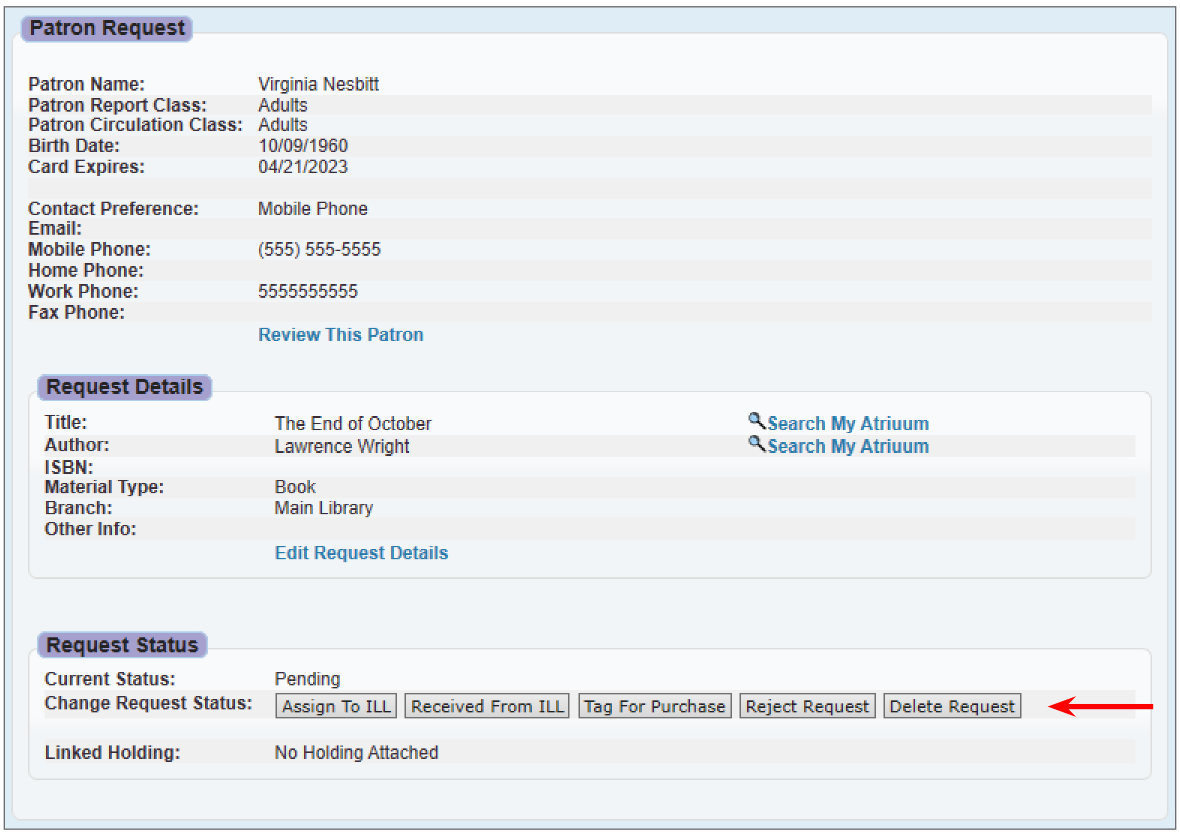
Current Status:	ILL Received
Change Request Status:	Reset To Pending · Assign To ILL · Returned To ILL Lender · Tag For Purchase · Reject Request
Delete Request	
Linked Holding:	Create Brief Record For ILL | Link Brief ILL Record

ILL Delete Requests

If you have a backlog of ILL requests that need to be cleaned out of your database, there are now two ways to perform this action: you can manually delete individual requests, or you can establish a time period after which pending requests are automatically removed.

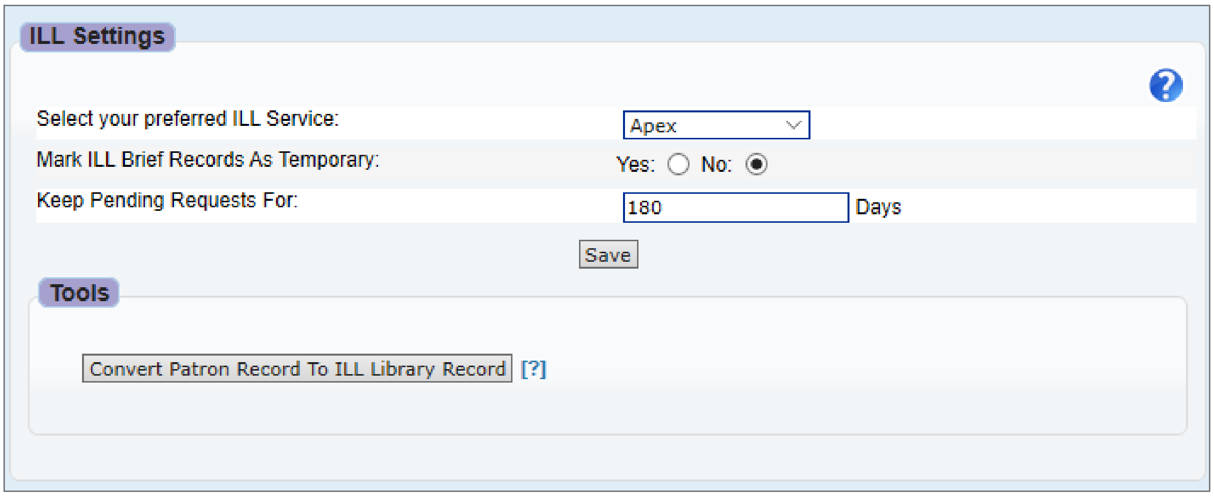
To remove a single request

1. Click **ILL** from Atriuum’s **Menu Bar**; under **Borrowing**, click **Review Request**.
2. Search for the request you want to remove.
3. Click **Delete Request**; a pop-up asks you to confirm the action, and the request is removed from your database.



To edit the setting

1. Click **Administration** from Atriuum’s **Menu Bar**, and then click **Library**.
2. Click **ILL Settings**.
3. By default, pending requests are kept for ***180*** days before being deleted from your database. To allow more or less time for deleting requests, highlight the default in the **Keep Pending Requests For: X Days** field, and enter a new number.
4. Click **Save** to keep your changes.



There are other ways Atriuum removes requests from your database automatically—no setup required.

- Requests that have been rejected are removed automatically after 7 days.
- Requests that have been tagged for purchase are removed automatically after 180 days.

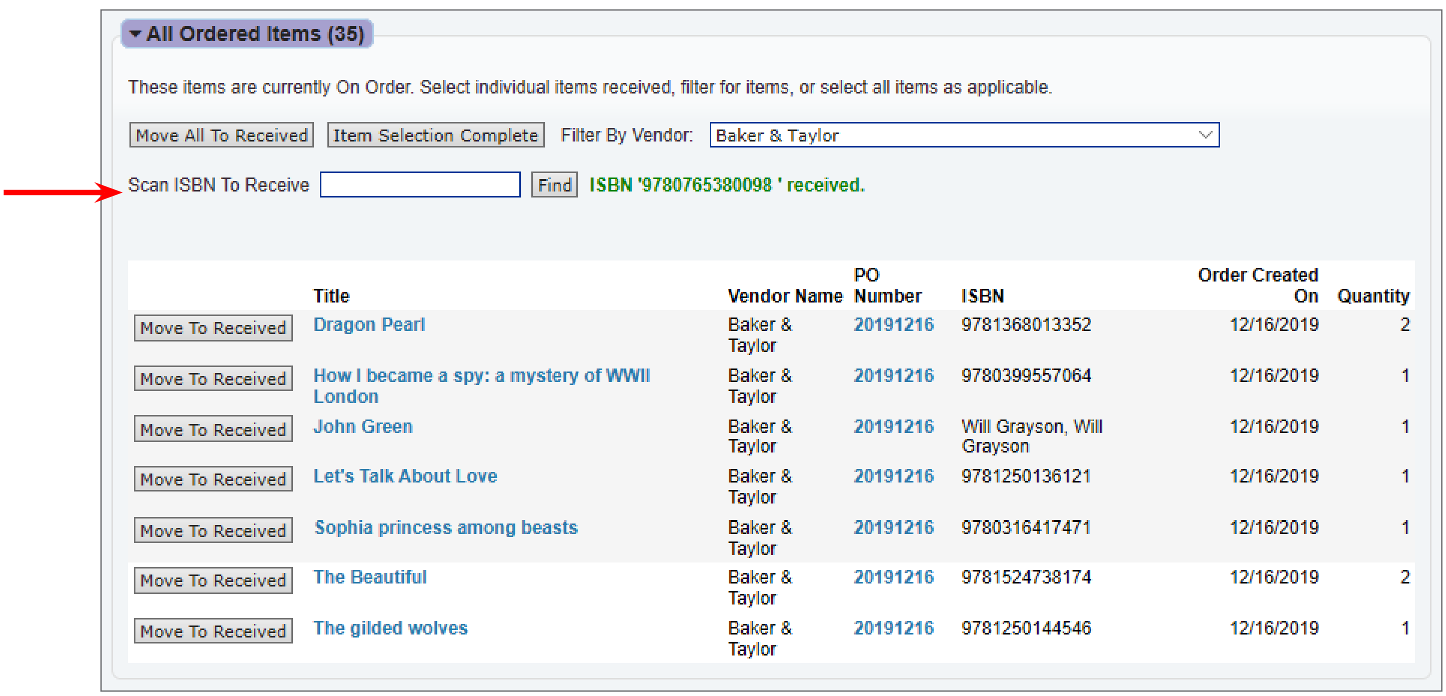
Acquisitions (requires license)

Scan ISBN to Receive Item

If you typically get shipments with a lot of items, streamline your workflow with scanning. Simply scan the item ISBN to move the item from the list of **All Ordered Items** to the **Items Received** form. Then, continue to reconcile the shipment as normal.

To reconcile a shipment

1. Click **Acquisitions** from Atriuum's **Menu Bar**; under **Orders**, click **Reconcile Shipment**.
2. Click an open invoice **number** to continue processing, or click **New Shipment** to start from scratch.
3. If needed, enter data such as the **Invoice Number**, date received, and any additional costs not account for on an individual order. This step is not required but is recommended for preserving history.
4. The **All Ordered Items** form displays every item currently assigned to an order in your system.
5. To quickly move items to the **Items Received** section, simply scan the ISBNs on your items to mark it as received.



	Title	Vendor Name	PO Number	ISBN	Order Created On	Quantity
Move To Received	Dragon Pearl	Baker & Taylor	20191216	9781368013352	12/16/2019	2
Move To Received	How I became a spy: a mystery of WWII London	Baker & Taylor	20191216	9780399557064	12/16/2019	1
Move To Received	John Green	Baker & Taylor	20191216	Will Grayson, Will Grayson	12/16/2019	1
Move To Received	Let's Talk About Love	Baker & Taylor	20191216	9781250136121	12/16/2019	1
Move To Received	Sophia princess among beasts	Baker & Taylor	20191216	9780316417471	12/16/2019	1
Move To Received	The Beautiful	Baker & Taylor	20191216	9781524738174	12/16/2019	2
Move To Received	The gilded wolves	Baker & Taylor	20191216	9781250144546	12/16/2019	1

6. When you have scanned all the items from the shipment, update quantities and **Invoiced Costs** as needed. When you have added all information and items for this shipment, click **Finalize**. Items will be marked as invoiced, fully filled orders will be closed, and any incomplete orders remain open.

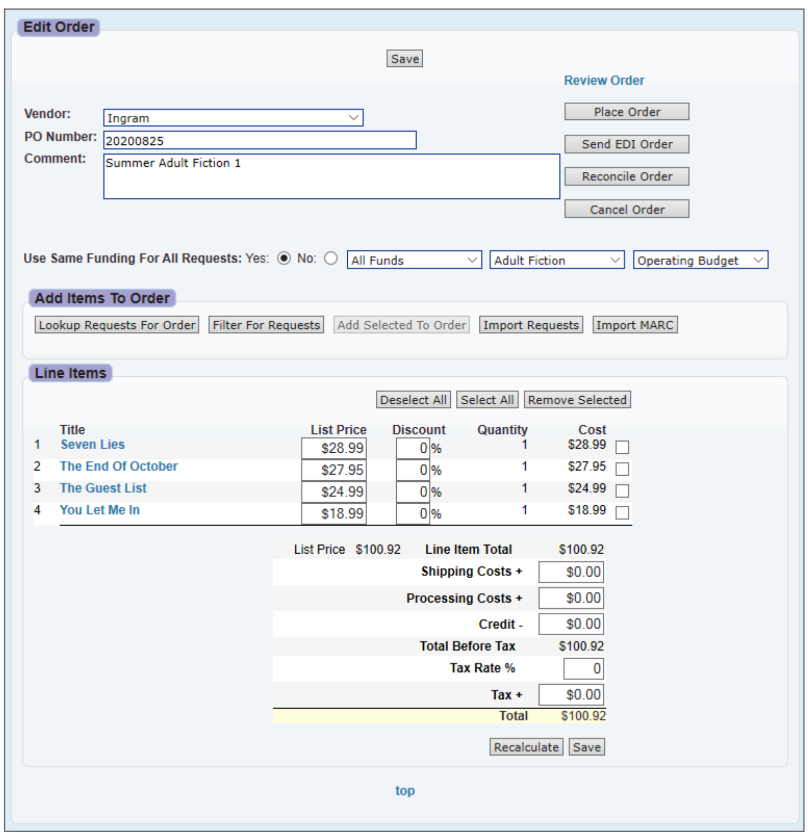
Update Order Funding In Bulk

If all the items in your order have the same funding, you can use the **Edit Order** form to change the funding of the requests in bulk rather than taking the time to edit each request. This process can be done for requests that were manually created, as well as those imported in text or MARC format.

To apply funding to an order

1. Click **Acquisitions** from Atriuum's **Menu Bar**; under **Orders**, click **Create Order**.
2. Select the **Vendor** and enter a purchase order number and any other information about this order; then, click **Create Order**.
3. On the **Edit Order** form, add requests using your usual workflow by searching/filtering for requests, or by importing requests.
4. Next to **Use Same Funding For All Requests:**, click **Yes**.
5. Click the first drop-down list, and click again to select a Fund Category.
6. Click the second drop-down list, and click again to select a Fund.
7. Click the third drop-down list, and click again to select a Source.
8. Click **Save** to apply this funding to every request in the order; this overrides any pre-existing funding.

This amount is now accounted for in your budget.



Authority (requires license)

Updated Terminology

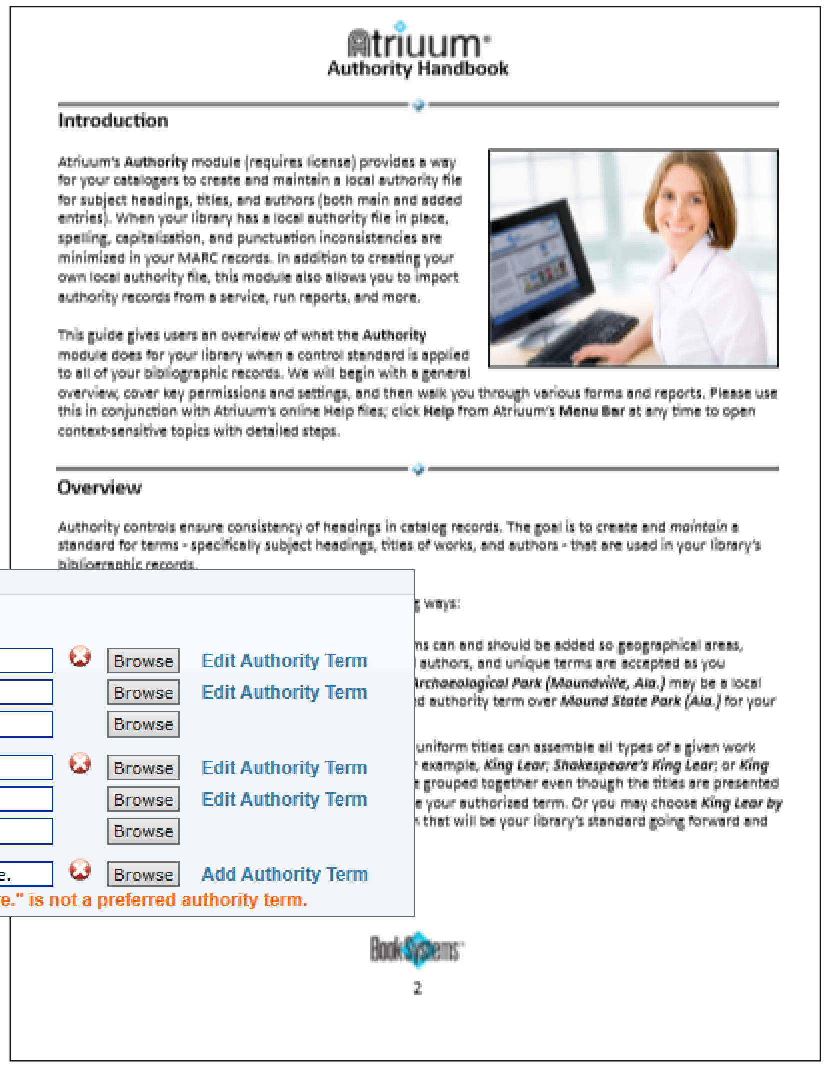
Atriuum's **Authority** module allows you to standardize subject headings and author names based on an imported file of authoritative terms or locally created authority terms. In this update, some field names have been updated for clarity and to conform to Library of Congress authority standards.

A new document is available to download or print for a complete walkthrough of the Authority module.

To purchase an Authority license, contact your Book Systems sales specialist.

To access the Authority Handbook

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Library**.
2. Click **Downloads**.
3. Click **AtriuumAuthorityHandbook.pdf** to view the document in a new tab.
4. Use your browser options to save or print the file as needed.



Atriuum®
Authority Handbook

Introduction

Atriuum's **Authority** module (requires license) provides a way for your catalogers to create and maintain a local authority file for subject headings, titles, and authors (both main and added entries). When your library has a local authority file in place, spelling, capitalization, and punctuation inconsistencies are minimized in your MARC records. In addition to creating your own local authority file, this module also allows you to import authority records from a service, run reports, and more.

This guide gives users an overview of what the **Authority** module does for your library when a control standard is applied to all of your bibliographic records. We will begin with a general overview, cover key permissions and settings, and then walk you through various forms and reports. Please use this in conjunction with Atriuum's online Help files; click **Help** from Atriuum's **Menu Bar** at any time to open context-sensitive topics with detailed steps.

Overview

Authority controls ensure consistency of headings in catalog records. The goal is to create and *maintain* a standard for terms - specifically subject headings, titles of works, and authors - that are used in your library's bibliographic records.

[illegible] ways:

[illegible] ms can and should be added so geographical areas, [illegible] authors, and unique terms are accepted as you [illegible] *rchaeological Park (Moundville, Ala.)* may be a local [illegible] d authority term over *Mound State Park (Ala.)* for your

[illegible] uniform titles can assemble all types of a given work [illegible] r example, *King Lear*; *Shakespeare's King Lear*; or *King* [illegible] grouped together even though the titles are presented [illegible] e your authorized term. Or you may choose *King Lear by* [illegible] n that will be your library's standard going forward and

Book Systems

2