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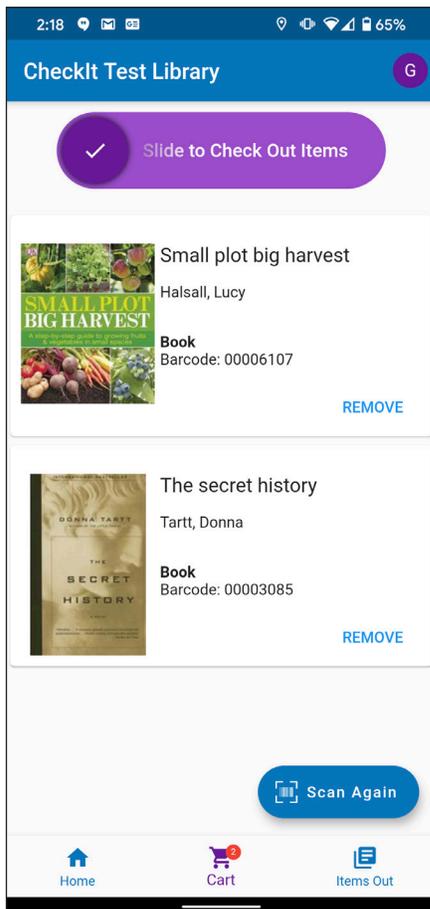
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Available Now!

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.

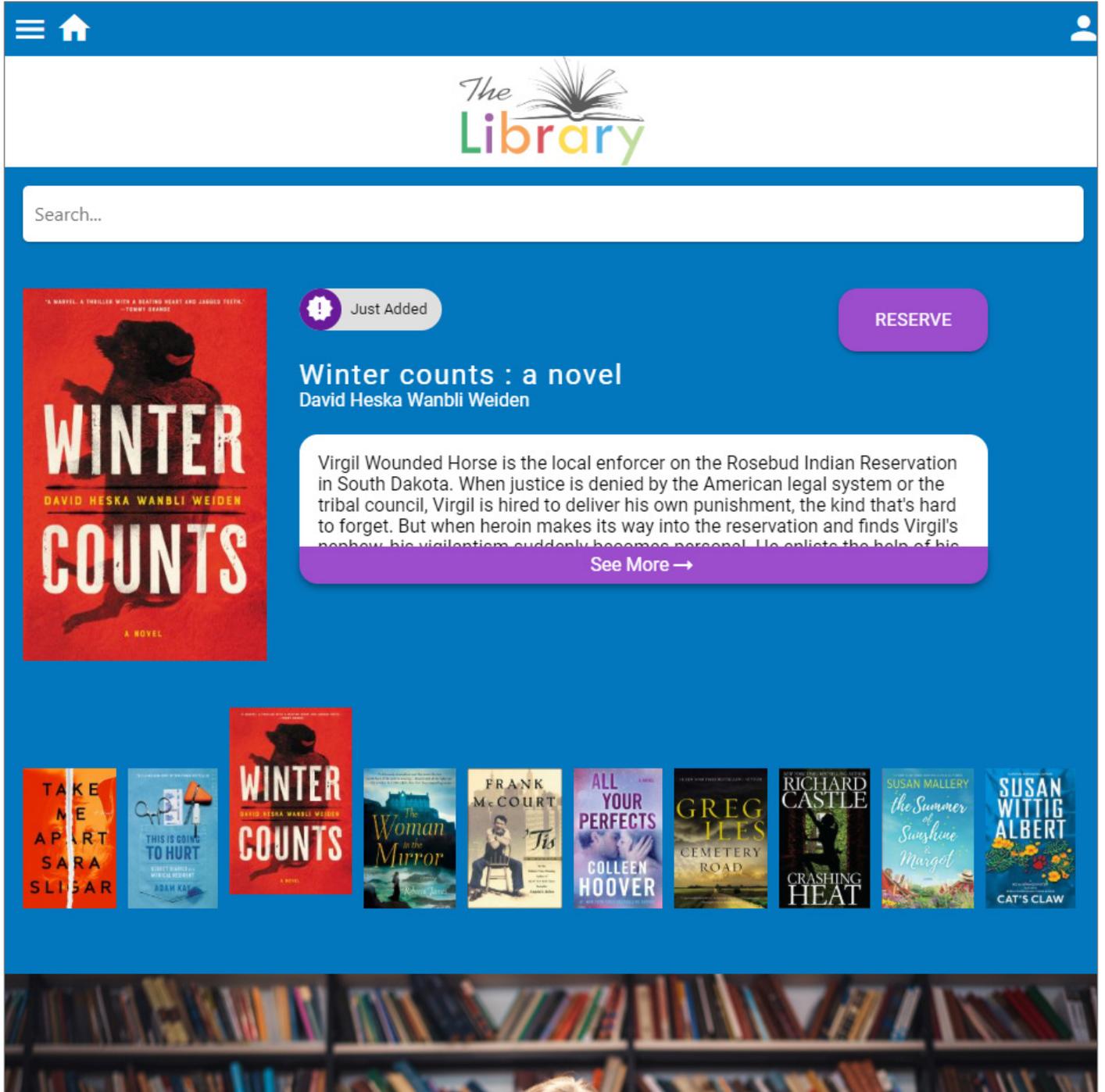


Scan item barcodes with your device camera,
then check out items with a slide of your finger!

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!



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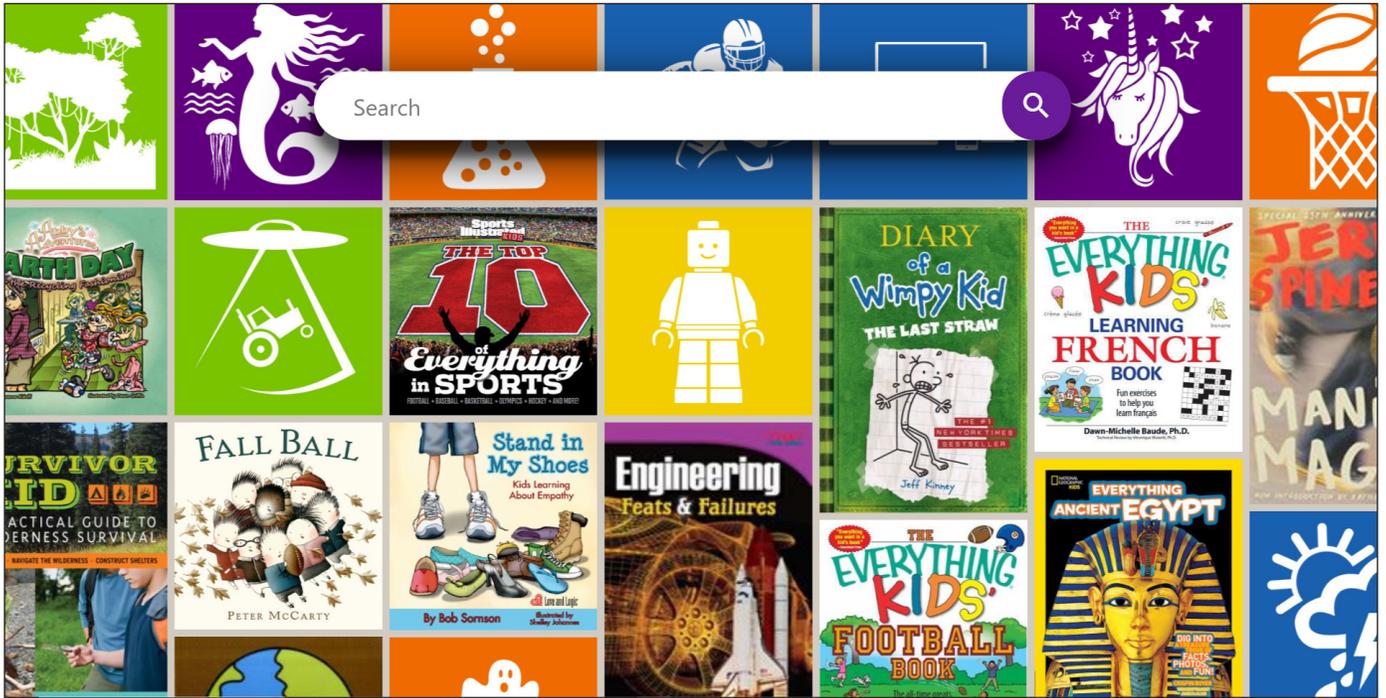
What's New in Atrium 12.9

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

The screenshot displays the Atrium patron dashboard for a user named Jane. At the top, there is a search bar and a navigation menu with options for Dashboard, Fines, My Lists, and Account. A 'SIGN OUT' button is located in the top right corner. Below the navigation, a summary bar shows account statistics: 109 History, 1 Overdue, 1 Due Soon, 1 Items Out, 1 Ready for Pickup, and 1 Reserved. The 'OVERDUE' section is highlighted in red, with a 'RENEW OVERDUE' button. Below this, a horizontal bar categorizes items into DUE SOON, ITEMS OUT, READY FOR PICKUP, and RESER. The main content area shows five book covers with their respective due dates and actions: 'H' for Homicide (Due: 9-7-2020, RENEW), 'The Family of MRS. TOM THUMB' (Due: 9-10-2020, RENEW), 'WINTER COUNTS' (Due: 9-22-2020, RENEW), 'The Woman in the Mirror' (at Main Library, CANCEL), and 'Lucy' (You'i, CA).

Quilt

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



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What's New in Atrium 12.9

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 Atrium'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 Atrium, 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).

Custom Sounds

Customize circulation sounds by task using the options below. Visit [Circulation Settings](#) to disable all sounds. 

Main Circulation		
Successful Check Out	<input type="text" value="checkout.mp3"/>	
Successful Check In	<input type="text" value="checkin.mp3"/>	
Unsuccessful Check Out/In (Including Override Notifications)	<input type="text" value="failure.mp3"/>	
Repeat Check Out (Same Patron And Same Item)	<input type="text" value="dingkle.mp3"/>	
Reserve Shelf Notification (When An Item Is Checked In)	<input type="text" value="onreserveshelf.mp3"/>	
Barcode Scanned/Entered In Check Out	<input type="text" value="Local Sound"/>	
Inter-Branch Loan/ILL Notification	<input type="text" value="scales.mp3"/>	
Patron Birthday Notification	<input type="text" value="happy-birthday.mp3"/>	
Kit Notification	<input type="text" value="chime1.mp3"/>	
Self Check Stations		
Successful Check Out	<input type="text" value="checkout.mp3"/>	
Successful Check In	<input type="text" value="checkin.mp3"/>	
Unsuccessful Check Out/In (Including Override Notifications)	<input type="text" value="failure.mp3"/>	
Reserve Shelf Notification (When An Item Is Checked In)	<input type="text" value="onreserveshelf.mp3"/>	
Patron Birthday Notification	<input type="text" value="happy-birthday.mp3"/>	

What's New in Atrium 12.9

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.

Review Item

Title:	"B" is for burglar	Review Bibliographic	
Author:	Grafton, Sue.	Patron Reviews/Ratings	
Barcode:	00003087 	Cost:	8.99
Call Number:	FIC Gra	Funding Source:	
	Branch:	Main Library	
Item Status:	Item is checked out Checked Out To: Nesbitt, Virginia (401643) Due On: 07/28/2020 Times Renewed: 1 Last Scan: 06/26/2020 04:43:24PM		
Copy Status:	1 of 3 copies currently available	Watch List Terms For This Author Watch List Terms For This Series Title Watch List Terms For These Subjects History For This Item	
Holdings Note:			
Kit Information:			
Lexile:	F&P Reading Level:		



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 Atrium'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.

Automatically Notify When Reserve Status Changes:	Yes: <input checked="" type="radio"/> No: <input type="radio"/>
Additional Message For Auto Reserve Shelf Notifications:	Call 555-555-1234 and we will bring items to your car.

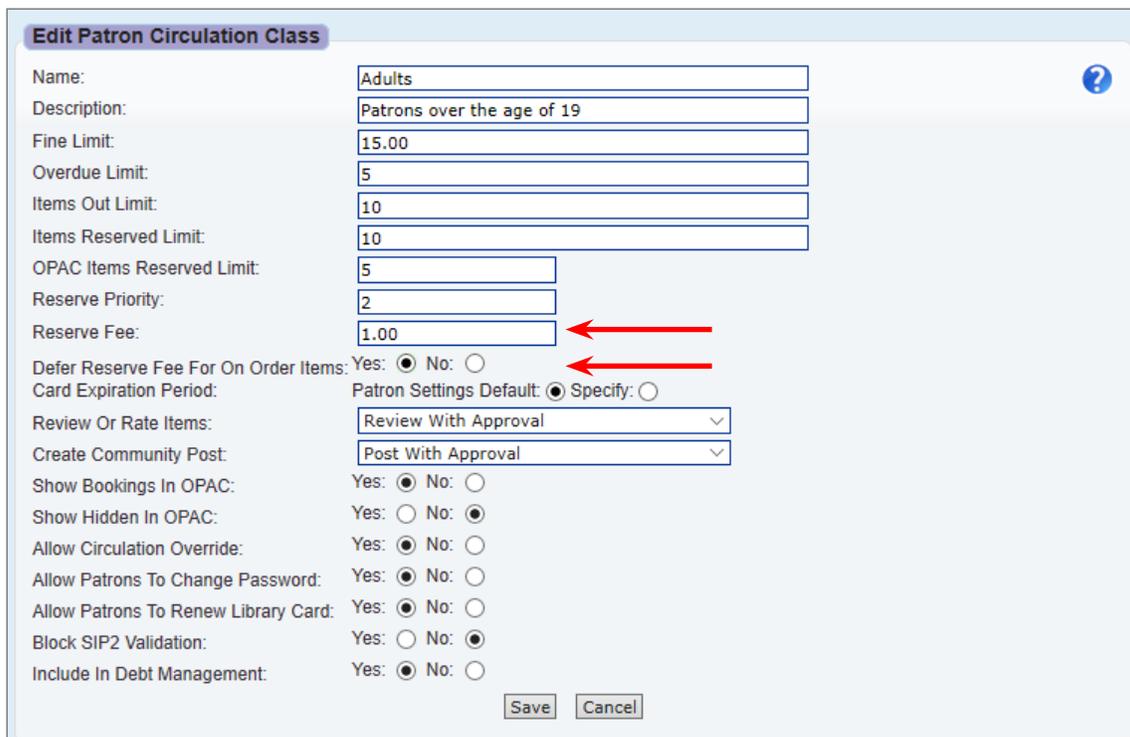
Delaying Reserve Fees For On Order Items

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 Atrium'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**.



Edit Patron Circulation Class

Name: Adults

Description: Patrons over the age of 19

Fine Limit: 15.00

Overdue Limit: 5

Items Out Limit: 10

Items Reserved Limit: 10

OPAC Items Reserved Limit: 5

Reserve Priority: 2

Reserve Fee: 1.00

Defer Reserve Fee For On Order Items: Yes: No:

Card Expiration Period: Patron Settings Default: Specify:

Review Or Rate Items: Review With Approval

Create Community Post: Post With Approval

Show Bookings In OPAC: Yes: No:

Show Hidden In OPAC: Yes: No:

Allow Circulation Override: Yes: No:

Allow Patrons To Change Password: Yes: No:

Allow Patrons To Renew Library Card: Yes: No:

Block SIP2 Validation: Yes: No:

Include In Debt Management: Yes: No:

Save Cancel

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What's New in Atrium 12.9

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 Atrium'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**.

Select Which Reports To Schedule For Library main Worker Bonnie

Available Reports:

Report Name	Remote Host URL	Username	Password	Report Format	Report Options	Time And Frequency (HH:MM or HH:MM AM/PM)	Action
<input type="checkbox"/> New Additions	<input type="text" value="acmeftp:210"/> <input type="button" value="["/> <input type="button" value="?"/>	<input type="text" value="mainstreet"/>	<input type="text" value="ID10469"/>	<input type="text" value="MARC Combined"/>	<input type="checkbox"/> Use Column Headers <input type="checkbox"/> Use Line Numbers	<input type="text" value="10:00 AM"/> <input type="text" value="Monthly"/> <input type="text" value="1"/>	<input type="button" value="Remove"/>
File Name: <input type="text" value="New Additions-%Y-%m-%d-%H.%M.%S"/>		<input type="button" value="Test"/>					

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What's New in Atrium 12.9

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 Atrium'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.

Edit Patron

Save History Delete Review Make Copy Add New Patron Messages

Last Name: *

First Name: *

Salutation:

Name Suffix:

Patron Nickname:

Barcode: *

Barcode Type: ▾

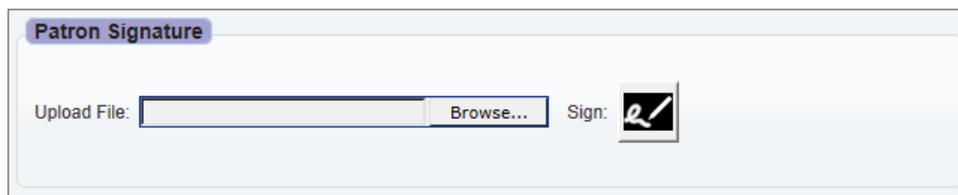
Topaz Signature Pad

If you capture patron signatures for account verification purposes, you can capture and save those images to the patron's record in Atrium. 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 Atrium 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 Atrium'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 Atrium'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 Atrium'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**.

Enable Patron Responsible For Feature:	Yes: <input checked="" type="radio"/> No: <input type="radio"/>
Force Global Responsibility For Circulation:	Yes: <input checked="" type="radio"/> No: <input type="radio"/>
Hide Titles For Responsible To Patrons:	Yes: <input checked="" type="radio"/> No: <input type="radio"/>
Block Circulation For Responsible For Fine Limits:	Yes: <input type="radio"/> No: <input checked="" type="radio"/>

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.

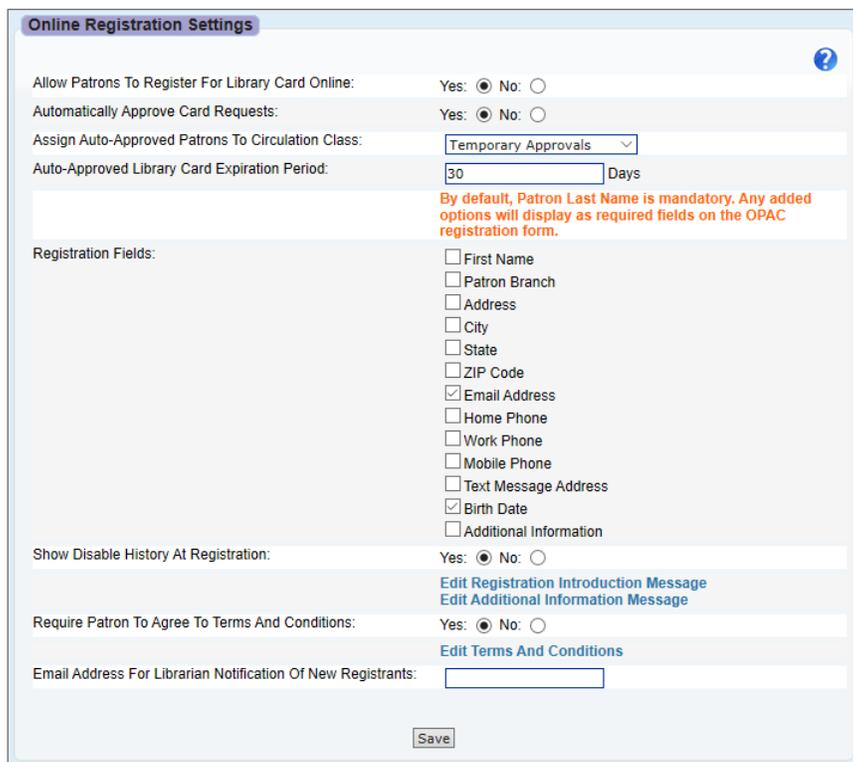
Before beginning the set up below, create a designated Patron Circulation Class with the limited permissions you would like to grant for temporary cards.

To set up temporary cards

1. Click **Administration** from Atrium'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.



Online Registration Settings

Allow Patrons To Register For Library Card Online: Yes: No:

Automatically Approve Card Requests: Yes: No:

Assign Auto-Approved Patrons To Circulation Class: Temporary Approvals

Auto-Approved Library Card Expiration Period: 30 Days

By default, Patron Last Name is mandatory. Any added options will display as required fields on the OPAC registration form.

Registration Fields:

- First Name
- Patron Branch
- Address
- City
- State
- ZIP Code
- Email Address
- Home Phone
- Work Phone
- Mobile Phone
- Text Message Address
- Birth Date
- Additional Information

Show Disable History At Registration: Yes: No:

[Edit Registration Introduction Message](#)
[Edit Additional Information Message](#)

Require Patron To Agree To Terms And Conditions: Yes: No:

[Edit Terms And Conditions](#)

Email Address For Librarian Notification Of New Registrants:



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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 Atrium.
- 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 Atrium'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.



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What's New in Atrium 12.9

OPAC

Watch Lists

Atrium 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 Atrium'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 Atrium'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**.

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Hoopla in OPAC

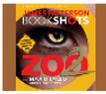
If your library subscribes to this third-party provider of eResources, search results for those items can be viewed in **OPAC**.

To enable Hoopla

1. Click **Administration** from Atrium'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.

The screenshot displays the Atrium OPAC interface with the 'Hoopla' tab selected. The search results are as follows:

Item	Author	Year	Copies	Format	Availability
	James Patterson	2010	Online	eBook	ONLINE
	James Patterson	2016	Online	Audiobook	ONLINE
	James Patterson	2016	Online	Audiobook	ONLINE
	James Patterson	2011	Online	eBook	ONLINE

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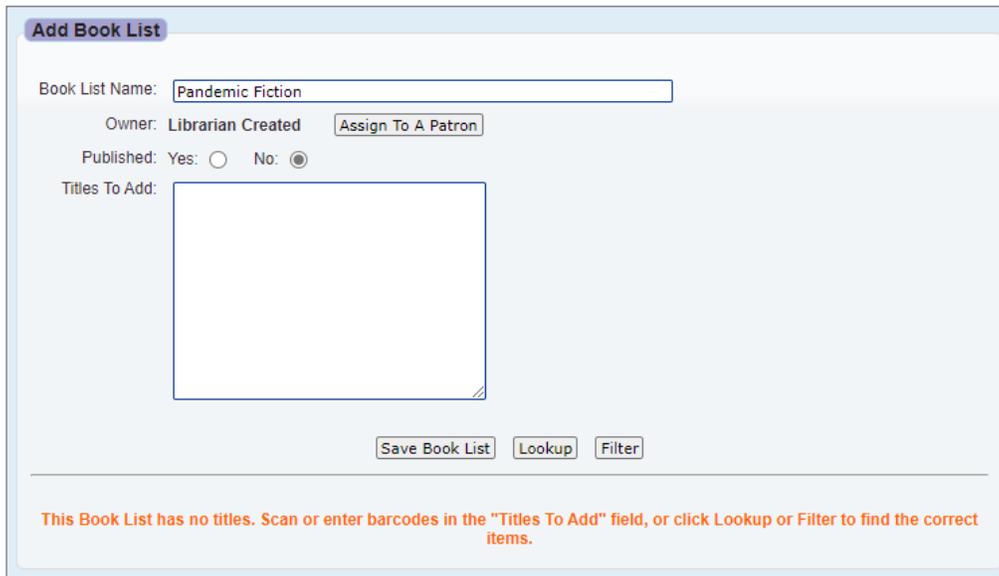
What's New in Atrium 12.9

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 Atrium. 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 Atrium'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.



Add Book List

Book List Name:

Owner: Librarian Created

Published: Yes: No:

Titles To Add:

This Book List has no titles. Scan or enter barcodes in the "Titles To Add" field, or click Lookup or Filter to find the correct items.

6. Click **Save Book List**.
7. Other options for managing this book list are described below:
 - **Clear Book List** - displays the total number of 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.

What's New in Atrium 12.9

To edit a Book List

1. Click **Patrons** from Atrium'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 of 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 CSV or txt format.
4. If you make changes to the contents of the list, click **Save Book List** to keep your changes.

Edit Book List

Added 15 titles to Book List.

Book List Name:

Owner: Librarian Created

Published: Yes: No:

Titles To Add:

Number Of Items In Book List: 15

#	Title	Author	Action
1	2030 : the real story of what happens to America	Brooks, Albert,	Remove
2	Allegiant	Roth, Veronica,	Remove
3	Animal farm	Orwell, George,	Remove
4	Animal farm ; : 1984	Orwell, George,	Remove
5	The Ballad of Songbirds and Snakes.	Collins, Suzanne	Remove
6	California : a novel	Lepucki, Edan.	Remove
7	A clockwork orange	Burgess, Anthony,	Remove
8	The End of the World Running Club	Walker, Adrian J.	Remove
9	The heart goes last	Atwood, Margaret,	Remove
10	Hystopia	Means, David	Remove
11	Matched	Condie, Allyson Braithwaite.	Remove
12	Mechanique : a tale of the Circus Tresaulti	Valentine, Genevieve.	Remove
13	Oryx and Crake : a novel	Atwood, Margaret,	Remove
14	Prism	Kellerman, Faye.	Remove

What's New in Atrium 12.9

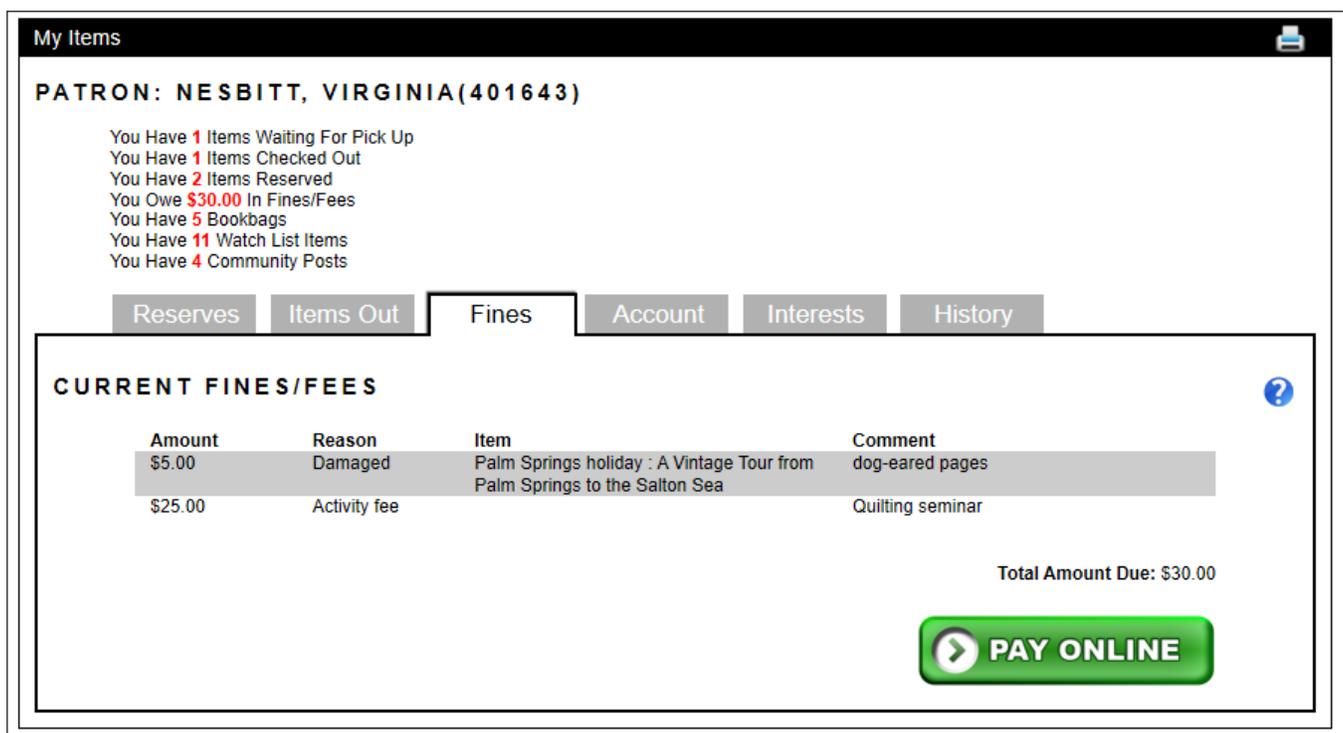
Comprise SmartPAY

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 Atrium'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.



My Items

PATRON: NESBITT, VIRGINIA(401643)

- You Have **1** Items Waiting For Pick Up
- You Have **1** Items Checked Out
- You Have **2** Items Reserved
- You Owe **\$30.00** In Fines/Fees
- You Have **5** Bookbags
- You Have **11** Watch List Items
- You Have **4** Community Posts

Reserves | Items Out | **Fines** | Account | Interests | History

CURRENT FINES/FEEES

Amount	Reason	Item	Comment
\$5.00	Damaged	Palm Springs holiday : A Vintage Tour from Palm Springs to the Salton Sea	dog-eared pages
\$25.00	Activity fee		Quilting seminar

Total Amount Due: \$30.00

PAY ONLINE

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What's New in Atrium 12.9

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 Atrium'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**.

The screenshot shows the 'Add/Edit Custom Links' form in the Atrium administration interface. The form includes the following fields and controls:

- Name:** A text input field containing 'Ancestry.com' and an **Update** button.
- URL:** A text input field containing 'http://ancestry.com' and a **Clear** button.
- Description:** An empty text input field.
- Requires Patron Log On:** Radio buttons for 'Yes' (selected) and 'No'.
- Image:** A **Choose File** button and the text 'No file chosen'.
- Link List:** A scrollable list of links including 'AR BookFinder', 'Alabama Virtual Library', 'Lexile Framework', 'Library of Congress', 'Our Profile', 'Web Browser', 'Events', 'Resource', 'Goodreads', 'Google Calendar', 'Ancestry.com' (highlighted), and 'Washington Post'.
- Actions:** **Delete**, **Up**, and **Down** buttons.
- Save:** A **Save** button at the bottom.

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

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What's New in Atrium 12.9

ILL (requires license)

ILL non-temporary records

Atrium'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 Atrium'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:	<input type="text" value="next available"/>	Call No. Prefix:	<input type="text"/>
Barcode Type:	<input type="text" value="ILL Barcode"/>	Call No.:	<input type="text"/>
Title:	<input type="text" value="Camino Winds"/>	Call No. Suffix:	<input type="text"/>
Author:	<input type="text" value="Grisham, John"/>	Lending Library:	<input type="text" value="Eastfork Public Library"/>
ISBN:	<input type="text" value="9780385545938"/>	Lending Barcode:	<input type="text" value="00008978"/>
UPC:	<input type="text"/>		
Item Circulation Class:	<input type="text" value="Book"/>		
Item Report Class:	<input type="text" value="Undefined"/>		
Cost:	<input type="text"/>		
Remove Record After Check In:	<input type="checkbox"/>		
Hide From OPAC:	<input checked="" type="checkbox"/>		

OR

Specify the ISBN/UPC you wish to look up using your specified Z39.50 databases:

ISBN/UPC:

What's New in Atrium 12.9

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 Atrium, 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**. Atrium 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.

Reserve Details

Reserve Details For: Nesbitt, Virginia (401643) [Review Patron](#)
Branch:

Title: Winter Counts
Pick Up At: East Branch
Currently At Branch: East Branch
Barcode: 00003939
Date Reserved: 09/08/2020
Expected Return Date: On Reserve
Call Number:

→ **Comment:** Automatically Reserved When Holding Was Linked To ILL Request

[Add To Reserve Shelf](#)

What's New in Atrium 12.9

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 Atrium'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:	atriumpatron@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 Atrium
Author:	Lawrence Wright	Search My Atrium
ISBN:		
Material Type:	Book	
Other Info:		

[Edit Request Details](#)

Request Status

Current Status:	ILL Received
Change Request Status:	<input type="button" value="Reset To Pending"/> <input type="button" value="Assign To ILL"/> <input type="button" value="Returned To ILL Lender"/> <input type="button" value="Tag For Purchase"/> <input type="button" value="Reject Request"/>
	<input type="button" value="Delete Request"/>

Linked Holding: [Create Brief Record For ILL](#) | [Link Brief ILL Record](#)

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What's New in Atrium 12.9

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 Atrium'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.

Patron Request

Patron Name:	Virginia Nesbitt
Patron Report Class:	Adults
Patron Circulation Class:	Adults
Birth Date:	10/09/1960
Card Expires:	04/21/2023
Contact Preference:	Mobile Phone
Email:	
Mobile Phone:	(555) 555-5555
Home Phone:	
Work Phone:	5555555555
Fax Phone:	

[Review This Patron](#)

Request Details

Title:	The End of October	Search My Atrium
Author:	Lawrence Wright	Search My Atrium
ISBN:		
Material Type:	Book	
Branch:	Main Library	
Other Info:		

[Edit Request Details](#)

Request Status

Current Status:	Pending
Change Request Status:	Assign To ILL Received From ILL Tag For Purchase Reject Request Delete Request
Linked Holding:	No Holding Attached

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What's New in Atrium 12.9

To edit the setting

1. Click **Administration** from Atrium'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.

ILL Settings ?

Select your preferred ILL Service: Apex

Mark ILL Brief Records As Temporary: Yes: No:

Keep Pending Requests For: 180 Days

Save

Tools

Convert Patron Record To ILL Library Record [?]

There are other ways Atrium 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.

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What's New in Atrium 12.9

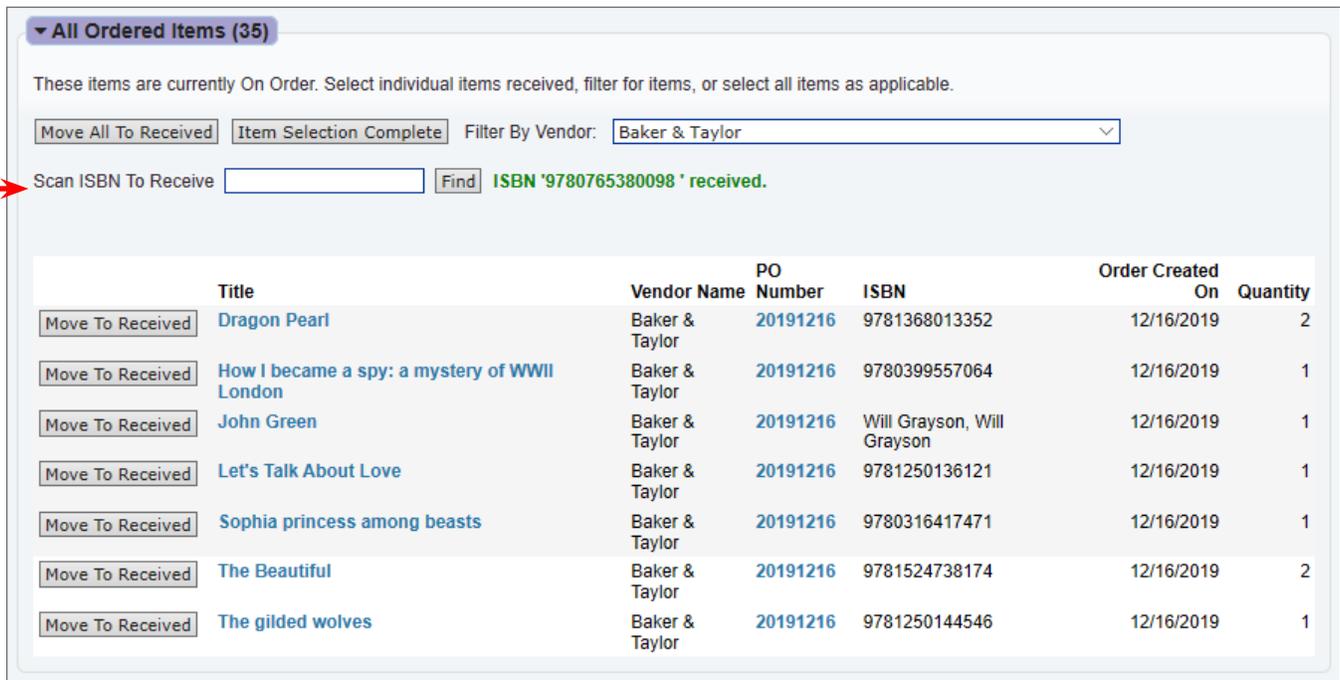
Acquisitions (requires license)

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 Atrium'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.



▼ All Ordered Items (35)

These items are currently On Order. Select individual items received, filter for items, or select all items as applicable.

Move All To Received Item Selection Complete Filter By Vendor: Baker & Taylor

Scan ISBN To Receive Find ISBN '9780765380098 ' 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.

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What's New in Atrium 12.9

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 Atrium'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.

The screenshot shows the 'Edit Order' form in Atrium. At the top, there is a 'Save' button and a 'Review Order' link. Below this, the 'Vendor' is set to 'Ingram', the 'PO Number' is '20200825', and the 'Comment' is 'Summer Adult Fiction 1'. There are buttons for 'Place Order', 'Send EDI Order', 'Reconcile Order', and 'Cancel Order'. The 'Use Same Funding For All Requests' section has 'Yes' selected, with three dropdown menus for 'All Funds', 'Adult Fiction', and 'Operating Budget'. Below this is the 'Add Items To Order' section with buttons for 'Lookup Requests For Order', 'Filter For Requests', 'Add Selected To Order', 'Import Requests', and 'Import MARC'. The 'Line Items' section contains a table with columns for Title, List Price, Discount, Quantity, and Cost. Below the table is a summary table showing the total list price, shipping costs, processing costs, credit, total before tax, tax rate, tax, and total amount.

Title	List Price	Discount	Quantity	Cost
1 Seven Lies	\$28.99	0%	1	\$28.99
2 The End Of October	\$27.95	0%	1	\$27.95
3 The Guest List	\$24.99	0%	1	\$24.99
4 You Let Me In	\$18.99	0%	1	\$18.99

List Price	\$100.92	Line Item Total	\$100.92
Shipping Costs +			\$0.00
Processing Costs +			\$0.00
Credit -			\$0.00
Total Before Tax			\$100.92
Tax Rate %			0
Tax +			\$0.00
Total			\$100.92

Authority (requires license)

Updated Terminology

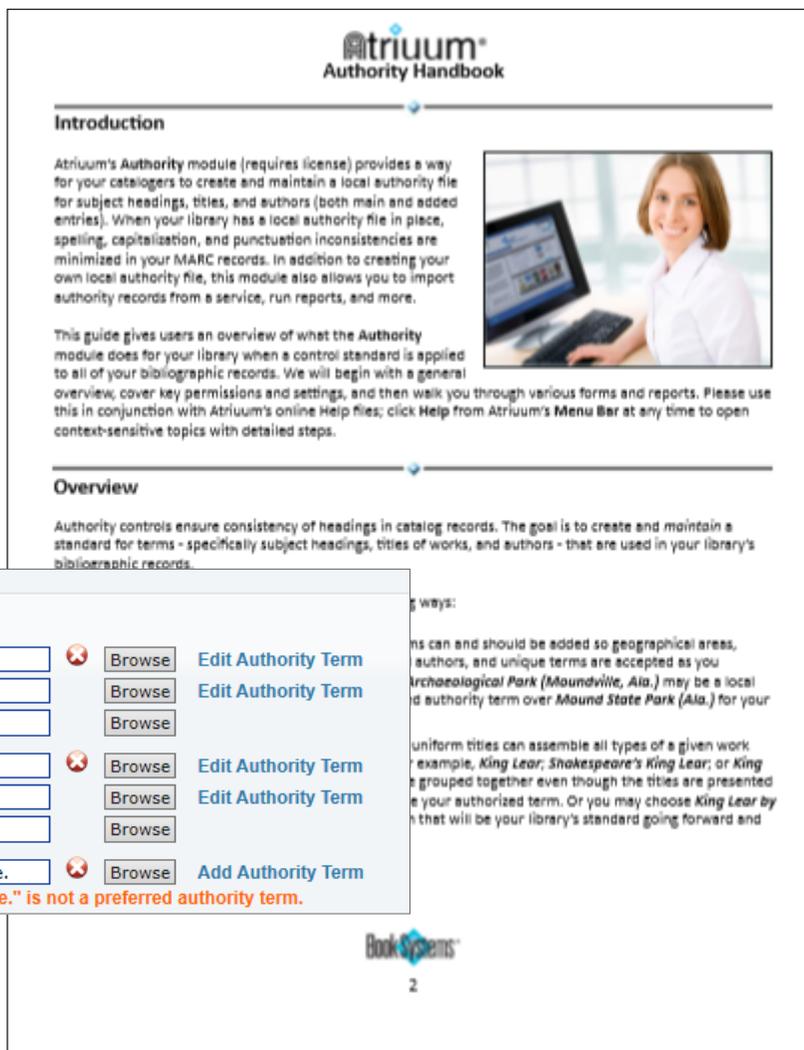
Atrium's **Authority** module allows you to standardize subject headings and author names based on an imported file of authoritative terms or locally created authority terms. In this update, some field names have been updated for clarity and to conform to Library of Congress authority standards.

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

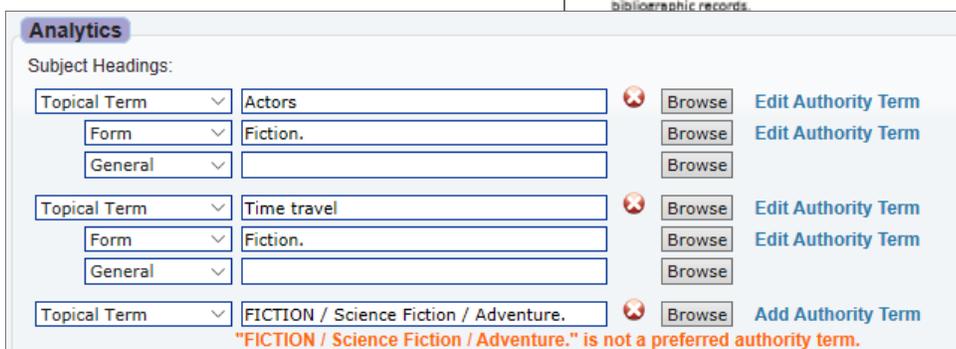
To purchase an Authority license, contact your Book Systems sales specialist.

To access the Authority Handbook

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



The screenshot shows the 'Atrium Authority Handbook' document. The 'Introduction' section explains that the Authority module provides a way for catalogers to create and maintain a local authority file for subject headings, titles, and authors. It also mentions that the module allows for importing authority records from a service. The 'Overview' section states that authority controls ensure consistency of headings in catalog records and that the goal is to create a standard for terms like subject headings, titles of works, and authors.



The screenshot shows the 'Analytics' section of the Atrium interface. Under 'Subject Headings', there are three rows of input fields. Each row has a 'Topical Term' dropdown, a text input field, a 'Form' dropdown, and a 'General' dropdown. The first row has 'Actors' in the topical term field. The second row has 'Time travel' in the topical term field. The third row has 'FICTION / Science Fiction / Adventure.' in the topical term field. To the right of each row are 'Browse' buttons and 'Edit Authority Term' or 'Add Authority Term' links. A red error message is displayed below the third row: '"FICTION / Science Fiction / Adventure." is not a preferred authority term.'