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WHAT'S NEW

Atriuum®

V 12.5

Atriuum®

What's New in Atriuum 12.5

Librarian Desktop Features

Log Off Toolbar Button and Hotkey

You can now add a **Log Off** button to your toolbar for your convenience to quickly sign out of Atriuum. You can also configure a **Hotkey** to add a keyboard shortcut for this action.

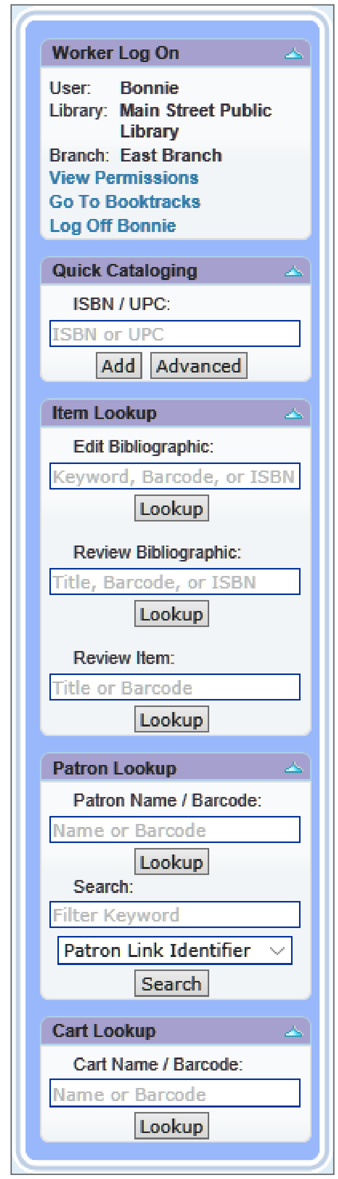
To add the Log Off button to your Toolbar

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Library**.
2. Click Worker Toolbar And Hotkey Configuration.
3. In the **Available Buttons** form, click the **Other** tab.
4. Double-click the **Log Off** button to add it to the **Enabled Buttons** form above.
5. Click and drag buttons to adjust the order.
6. Click **Save**.

To add a Hotkey to Log Off

1. From the **Worker Toolbar And Hotkey Configuration** form, click the **Other** tab.
2. Next to **Log Off**, click **Define Hotkey**.
3. Use your keyboard to enter the combination you want to use for your shortcut (ex. ***Ctrl+L***).
4. The combination displays. To assign this hotkey, click **OK**.
5. Click **Save**.

Left Column Filters



You can use the **Left Column** to quickly find item or patron records. Cues in the search fields tell you what criteria you can use to find records:

Quick Cataloging

- ISBN / UPC - search by 10- or 13-digit ISBN or by UPC

Item Lookup

- Edit Bibliographic - search by keyword, barcode, or ISBN
- Review Bibliographic - search by title, barcode, or ISBN
- Review Item - search by title or barcode

Patron Lookup

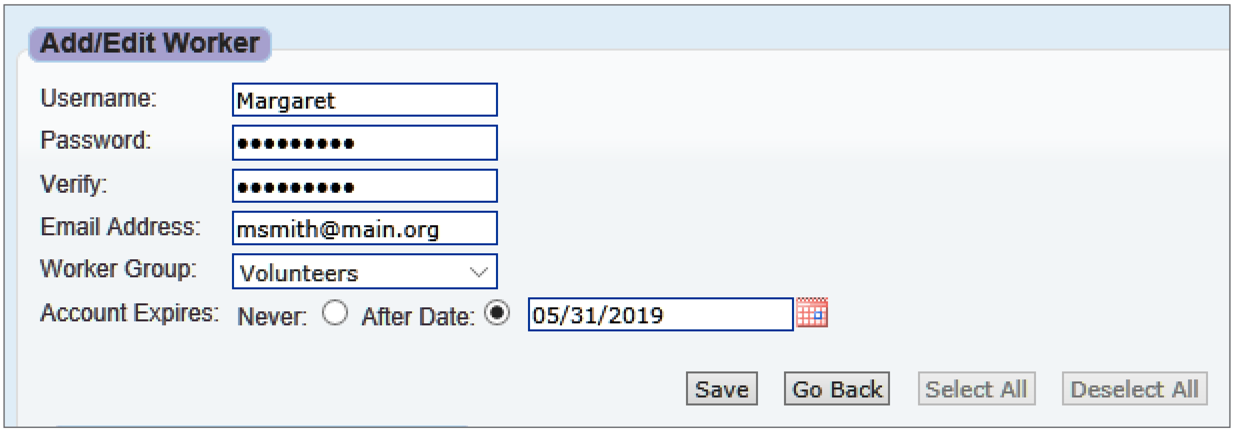
- Patron Name / Barcode - search by name or barcode
- Search - search by a criterion from the drop-down list (Patron Link Identifier, Unique User Defined Field, User Defined Field)

Cart Lookup

- Cart Name / Barcode - search by name or barcode

Temporary Worker Accounts

Do you have volunteers or seasonal school staff that you would like to block from logging on when they are not actively working? You can now create worker records for a specific time frame and include an expiration date, such as the last day of school.



To add an expiration date for an existing worker account

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Library**.
2. Click **Worker Records**.
3. Click **[Edit]** in the **Action** column for the worker you want to modify. The **Add/Edit Worker** form displays.
4. Click the **After Date:** radio button adjacent to **Account Expires:** to indicate that this is a temporary account.
5. Enter the date the worker record should be disabled, or use the calendar icon to select a date.
6. Click **Save** to keep your changes.

The account will be disabled on the expiration date, and the worker will no longer be able to log on.

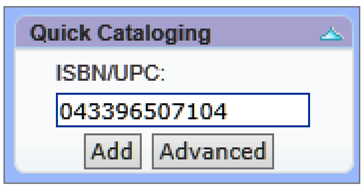
Cataloging Features

Quick Cataloging by UPC

Quick Cataloging is the fastest way to add bibliographic records to your database. This feature has been enhanced to search by Universal Product Code (UPC) for items that do not have an ISBN, such as DVDs. The Quick Cataloging form now recognizes UPC numbers and searches your Z39.50 servers to find results so you can quickly add a record for the item.

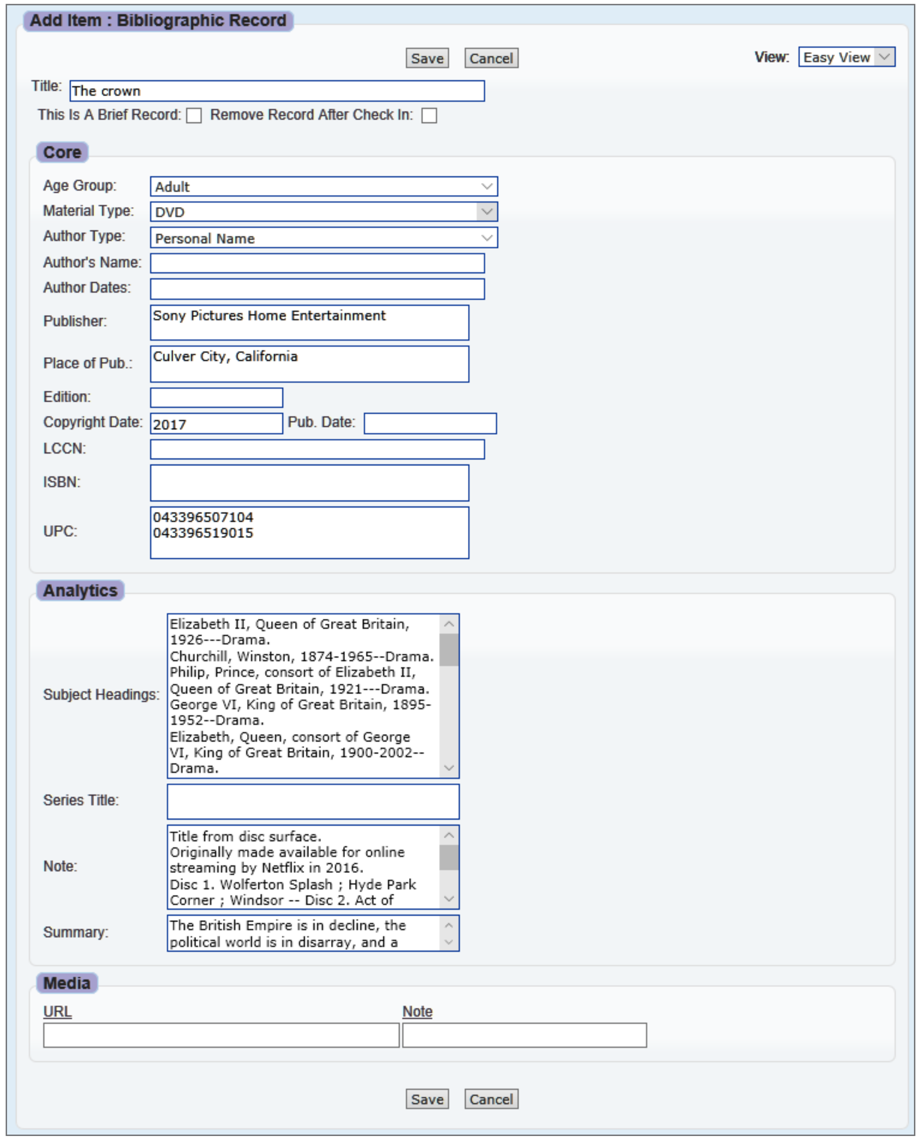
To search for a record by UPC

1. Scan the UPC barcode into the **Quick Cataloging** form.



2. If a match is found, the **Add Item: Bibliographic Record** form opens. Modify fields as needed, including Material Type, Age Group, etc.
3. Click **Save**.
4. Add holdings to the record just as you would for any other item.

If Atriuum does not return a record based on the UPC, click **Advanced**, and enter other information to find a record. You can also add more Z39.50 servers to your **Quick Cataloging Settings** to ensure better results.



Last Modified By and Last Modified Date filtering options

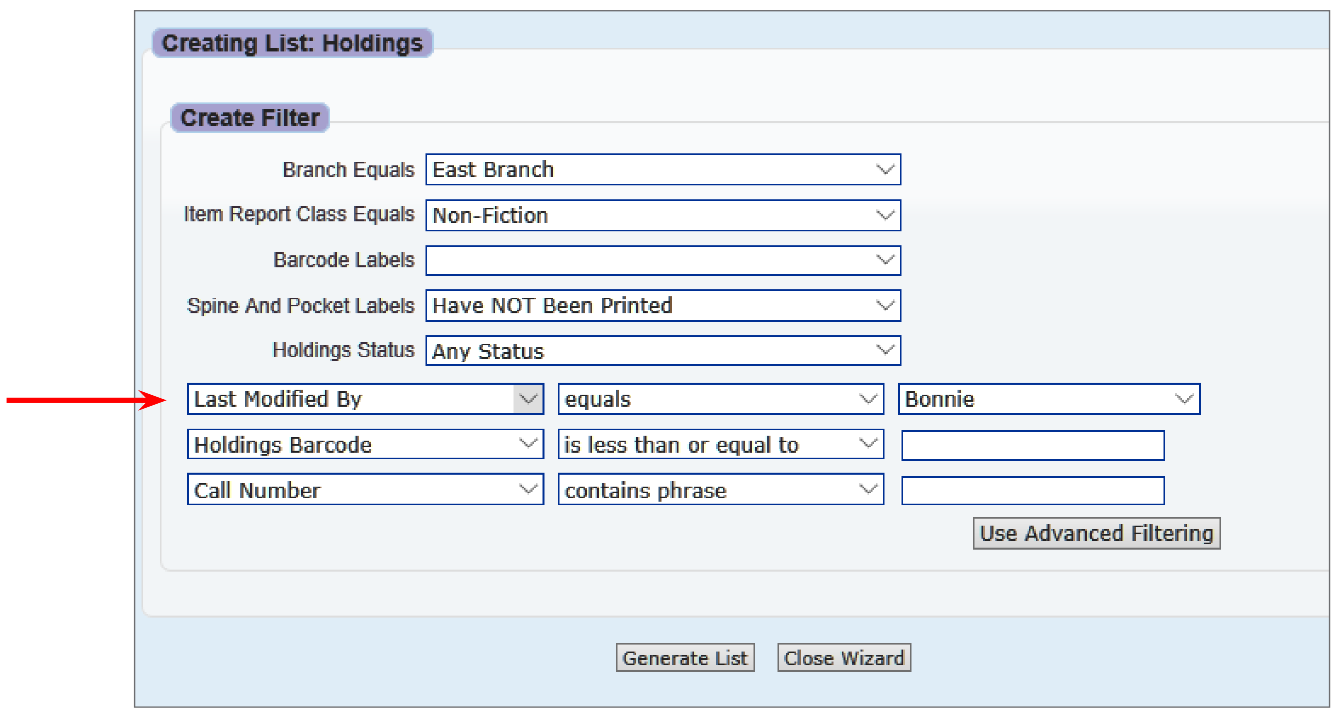
If you need to find items that were cataloged by you or a specific worker, you can now use the **Last Modified By** filtering option to narrow your results. This might be useful if your library has multiple catalogers who work simultaneously (such as one for Adult materials and one for Juvenile materials). Each cataloger can filter for the items he/she worked on when printing barcodes or spine/pocket labels.

You can also use the **Last Modified Date** filter to limit your results to items modified on a certain date, such as if you come back to work on a Monday and need to finish a stack of items you worked on the previous Friday.

An example of using one of these new filters is explained below.

To print Spine and Pocket Labels for items cataloged by one worker

1. Click **Catalog** from Atriuum's **Menu Bar**.
2. Under **Labels**, click **Spine/Pockets**.
3. Click **Filter**. Modify the Branch (**Centralized** only), Item Report Class, or any other filters as needed.
4. Under **Holdings Status**, click the first drop-down button (leftmost), scroll to ***Last Modified By***, and click to select it.
5. Click the next drop-down button (middle), and click again to select ***equals***.
6. Click the next drop-down button (rightmost), and click again to select the ***worker name*** from the list.
7. Modify any other criteria as needed, and then click **Generate List**.
8. The records populate the **Print Queue**. Follow your usual procedure for printing.



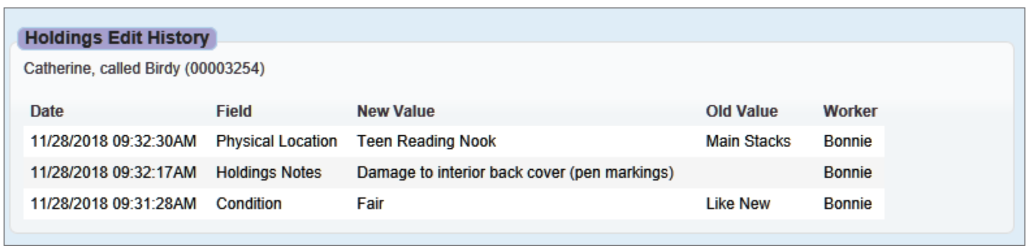
View History of Edits to an Item Record

If you need to determine what change was made to an item record, when, or by whom, you can now access a report of edits to a specific holding or bibliographic record (see "Viewing History Permissions for Workers" on page 44).

Only changes to records made after your Atriuum upgrade will display in this report.

To view edit history

1. Open the bibliographic or holding record you need to examine using the **Left Column** lookup forms or the **Menu Bar**.
2. On the **Edit Item: Bibliographic Record** form (**Full View** only) or the **Holding Record** form, click Display Edit History.
3. A list of changes made to the record displays along with the editing worker and the old and new values of the field.


Holdings Edit History

Catherine, called Birdy (00003254)

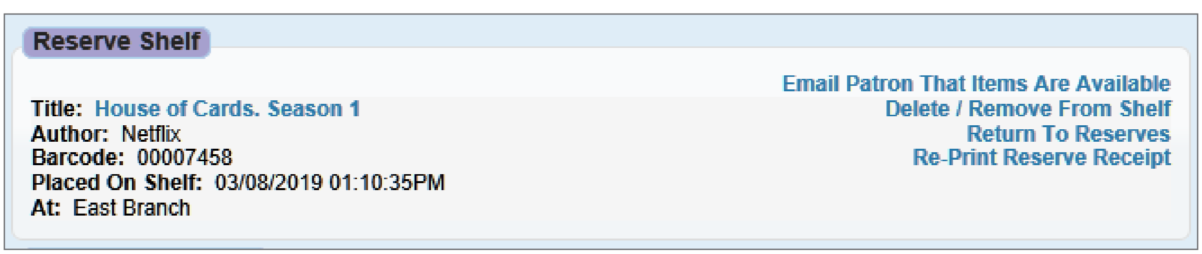
Date	Field	New Value	Old Value	Worker
11/28/2018 09:32:30AM	Physical Location	Teen Reading Nook	Main Stacks	Bonnie
11/28/2018 09:32:17AM	Holdings Notes	Damage to interior back cover (pen markings)		Bonnie
11/28/2018 09:31:28AM	Condition	Fair	Like New	Bonnie

Display Extended Title in More Locations

By default, Atriuum displays an item's extended title in bibliographic records and in **Full Details** (in **OPAC**). If you catalog items such as DVDs with season or disc information in the extended title and need to differentiate quickly when working in Atriuum, enable this setting to see extended titles in more locations.

To enable extended titles throughout Atriuum

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Catalog**.
2. Click Catalog Settings.
3. Next to **Display Extended Title Where Applicable:**, click **Yes**; then click **Save**.

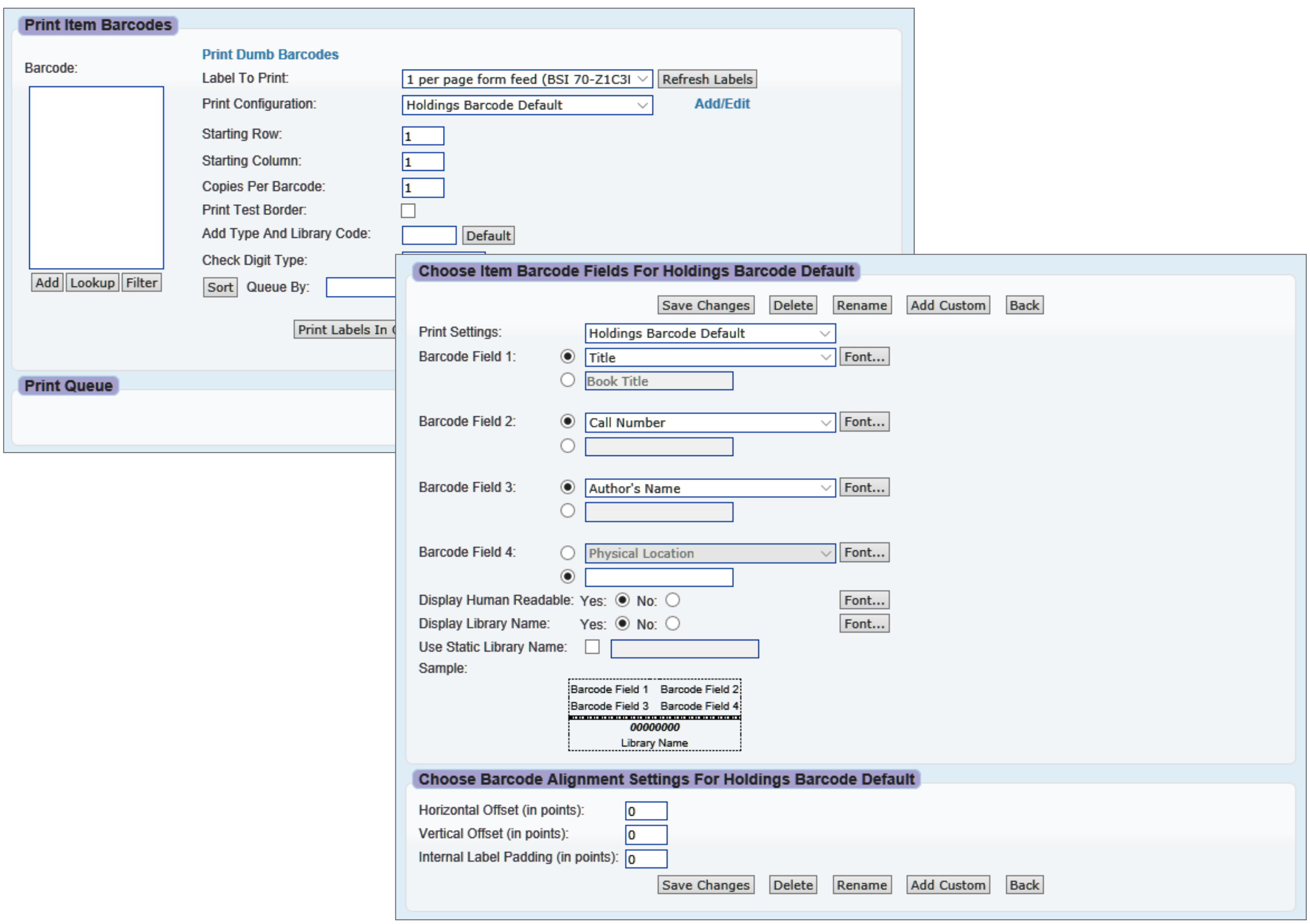


Print Settings Configurations

When printing different types of labels for items or patrons, you can create and save a settings configuration that can be accessed at any time. This is useful if different catalogers work simultaneously or if different printers are used.

To establish settings for labels

1. From any form for printing item or patron labels, click **Add/Edit**.
2. To modify an existing configuration, click the **Print Settings:** drop-down button, and click again to select the one you need to change. Edit fields, font, alignment, etc. as needed, and click **Save Changes**.
3. To create a new print configuration, click **Add Custom**. Enter a name for the configuration, edit fields, font, alignment, etc. as needed, and click **Save Changes**.
4. **Successes** and **Errors** display as they apply. Click **Back** to return to the previous form.
5. Continue printing labels as usual.



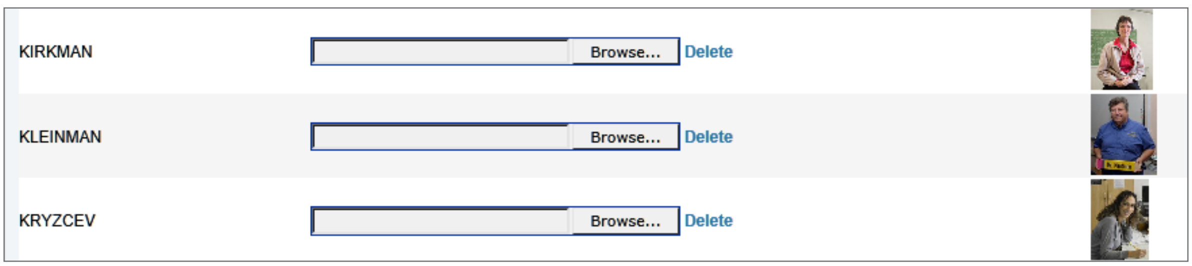
Circulation Features

Patron Report Class Pictures in Self Check Out

If your report classes are based on classrooms, you can add images for each teacher. This helps younger patrons easily identify their class when using the **Self Check Out** module (active license required).

To add images for patron report classes

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Patrons**.
2. Click Patron Report Class Pictures.
3. Next to the report class you want to add a picture for, click **Browse...** (or **Choose File** depending on your browser). Navigate to the file you want to add, and click **Open**.
4. Repeat these steps for all the report classes you need to add images for.
5. Click **Save Changes**. The form refreshes, and a thumbnail of the teacher's image displays.



To enable report class pictures

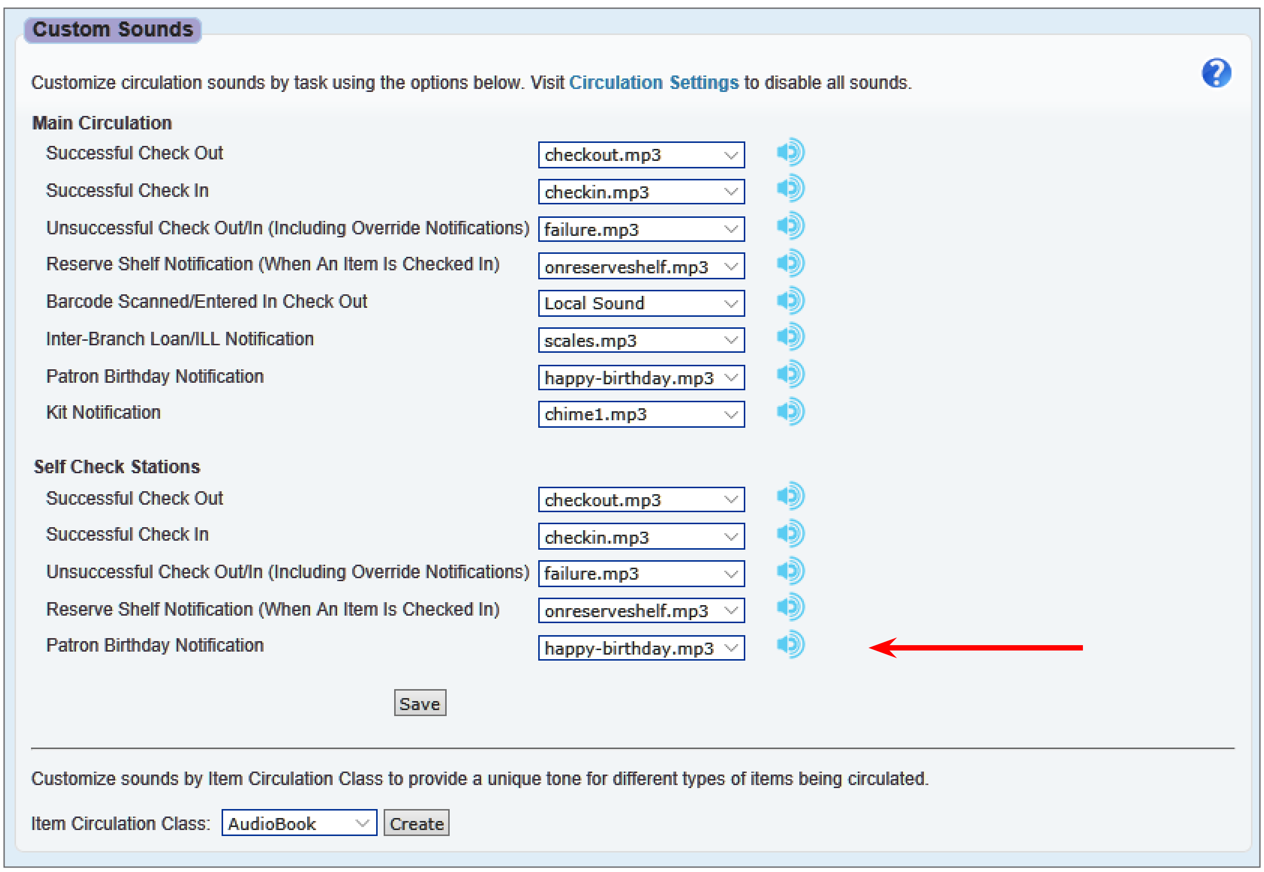
1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Circulation**.
2. Click Circulation Settings.
3. In the *Self Check Station Settings* section, click **Yes** next to **Display Patron Report Class Pictures During Self Check Out:** to enable the setting.
4. Click **Save**.
5. If you have the **Choose By Class** patron lookup method enabled, images display during **Self Check Out**.

Happy Birthday Song in Self Check Stations

If you have younger patrons who just love to bask in their special day, enable a custom sound to help them celebrate. If the patron checks an item in or out using Self Check Stations on his/her birthday, a song or sound will play.

To add a custom sound

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Library**.
2. Click **Custom Sounds**.
3. Under *Self Check Stations*, click the drop down list next to **Patron Birthday Notification**, and click again to select a sound, or click ***Upload Local Sound*** in the list to use an .mp3 file from your computer.
4. Click **Save**.
5. When patrons check items in and out on their birthday, the sound will play.

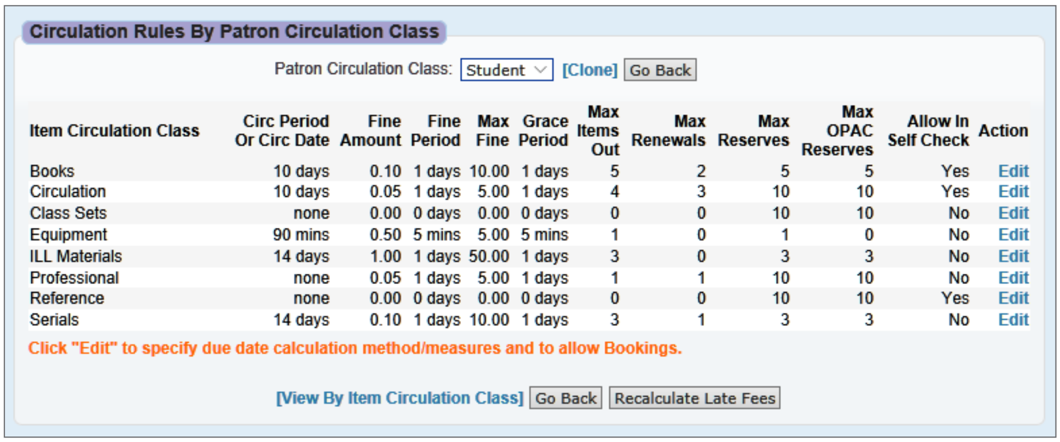


Restrict Self Check using Circulation Rules

If you have valuable items that you do not want patrons to be able to check in or out using **Self Check Stations** (active license required), you can use **Circulation Rules** to ensure those items are checked in/out by staff. For example, you might allow patrons to check out books and DVDs using Self Check Out but require them to see a staff member to borrow a tablet or laptop.

To restrict self check circulation by item and patron class

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Circulation**.
2. Click **Circulation Rules**.



Circulation Rules By Patron Circulation Class

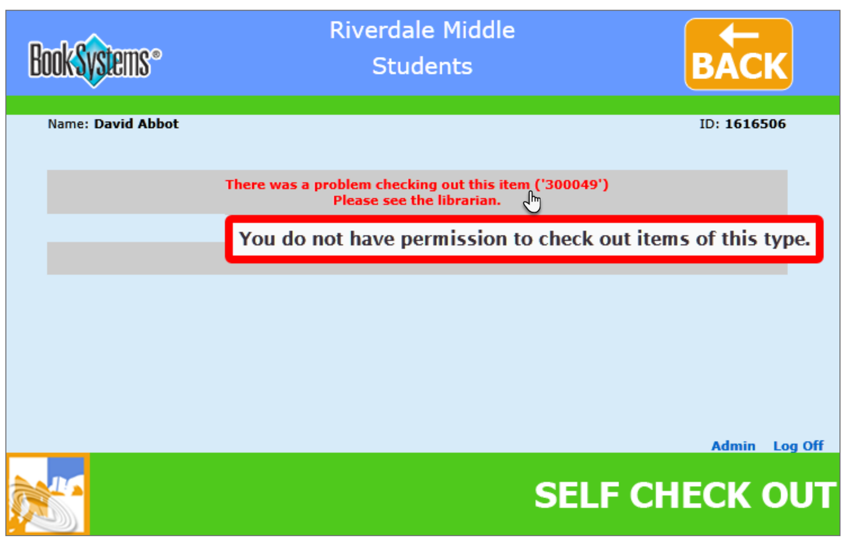
Patron Circulation Class: Student [Clone] Go Back

Item Circulation Class	Circ Period Or Circ Date	Fine Amount	Fine Period	Max Fine	Grace Period	Max Items Out	Max Renewals	Max Reserves	Max OPAC Reserves	Allow In Self Check	Action
Books	10 days	0.10	1 days	10.00	1 days	5	2	5	5	Yes	Edit
Circulation	10 days	0.05	1 days	5.00	1 days	4	3	10	10	Yes	Edit
Class Sets	none	0.00	0 days	0.00	0 days	0	0	10	10	No	Edit
Equipment	90 mins	0.50	5 mins	5.00	5 mins	1	0	1	0	No	Edit
ILL Materials	14 days	1.00	1 days	50.00	1 days	3	0	3	3	No	Edit
Professional	none	0.05	1 days	5.00	1 days	1	1	10	10	No	Edit
Reference	none	0.00	0 days	0.00	0 days	0	0	10	10	Yes	Edit
Serials	14 days	0.10	1 days	10.00	1 days	3	1	3	3	No	Edit

Click "Edit" to specify due date calculation method/measures and to allow Bookings.

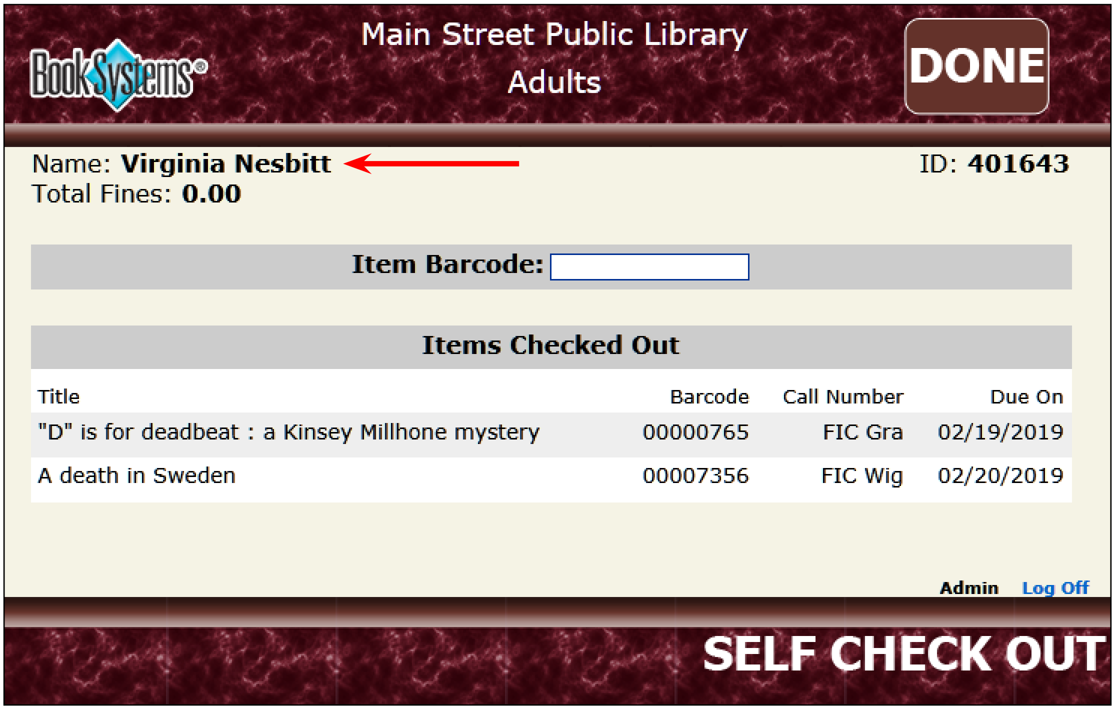
[View By Item Circulation Class] Go Back Recalculate Late Fees

3. In the **Action** column for the **Item Circulation Class** you need to modify, click **Edit**.
4. Under **Restrictions**, click **No** for the **Allow In Self Check:** option. Then, click **Save**.
5. The **Circulation Rules By Patron Circulation Class** form reopens. To add this restriction to another patron class, click the drop-down button, and click to select another class. Then repeat steps 3-4. If needed, you can allow some patrons (such as teachers) to check out/in using Self Check but not others (such as students).
6. When patrons try to check out a restricted item, they will see an error message.



Self Check Patron Name

For better readability, some text elements in the **Self Check** modules (active license required) have been increased in size.

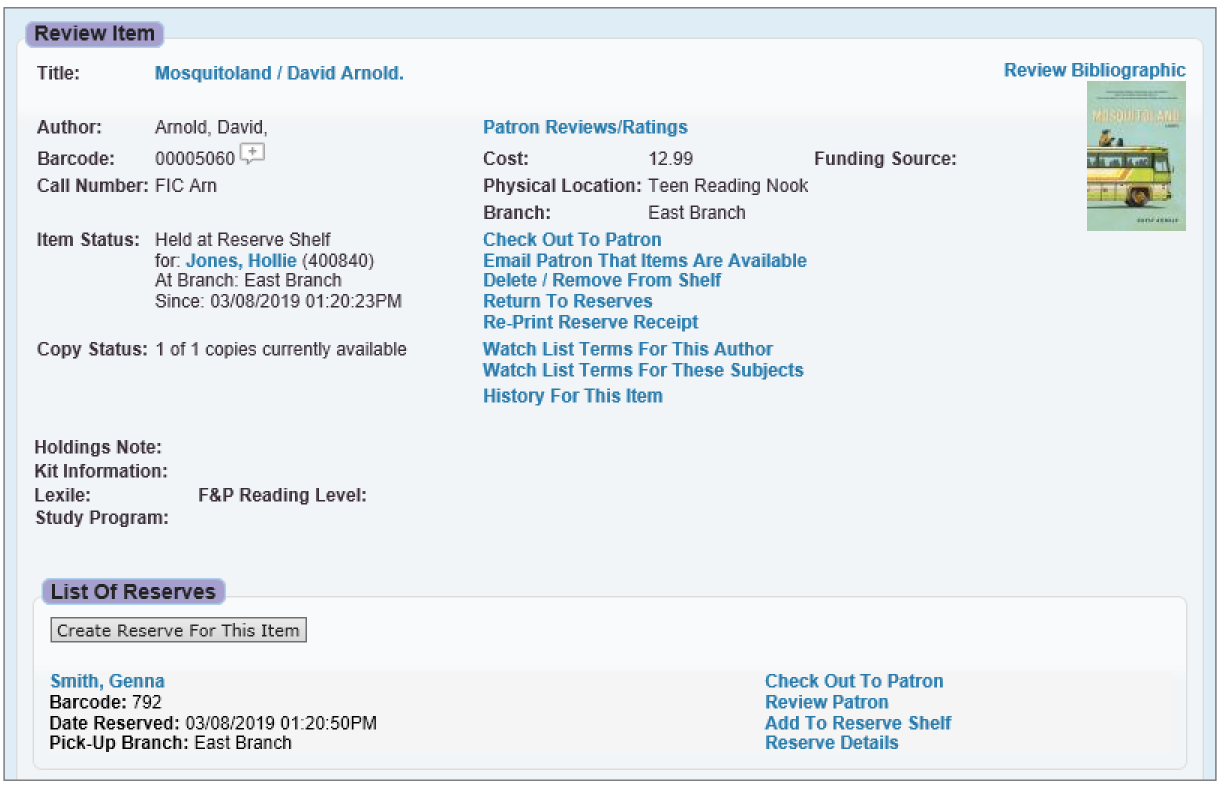


Automatically Assign Patron-Cancelled Reserves To Next In Line

By default, when a patron cancels a reserve through **My Items**, the reserved item is assigned to the next patron in line. This setting allows you to disable that option and choose to manually make these reserve decisions instead.

To disable automatic reserve reassignment

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **OPAC**.
2. Click **General And Patron Account Settings**.
3. Under *Reserve Settings*, next to **Automatically Assign Patron-Cancelled Reserves To Next In Line:**, click **No** to disable the setting.
4. Click **Save**.



If the setting is enabled (default) and patron ***Hollie Jones*** in the image above cancels her reservation through **OPAC**, the **Reserve Shelf** will automatically update to show ***Genna Smith*** as the patron entitled to the item. If the setting is disabled, the **Item Status** will be *Item is not checked out* and you must add the item to the **Reserve Shelf** for Genna manually.

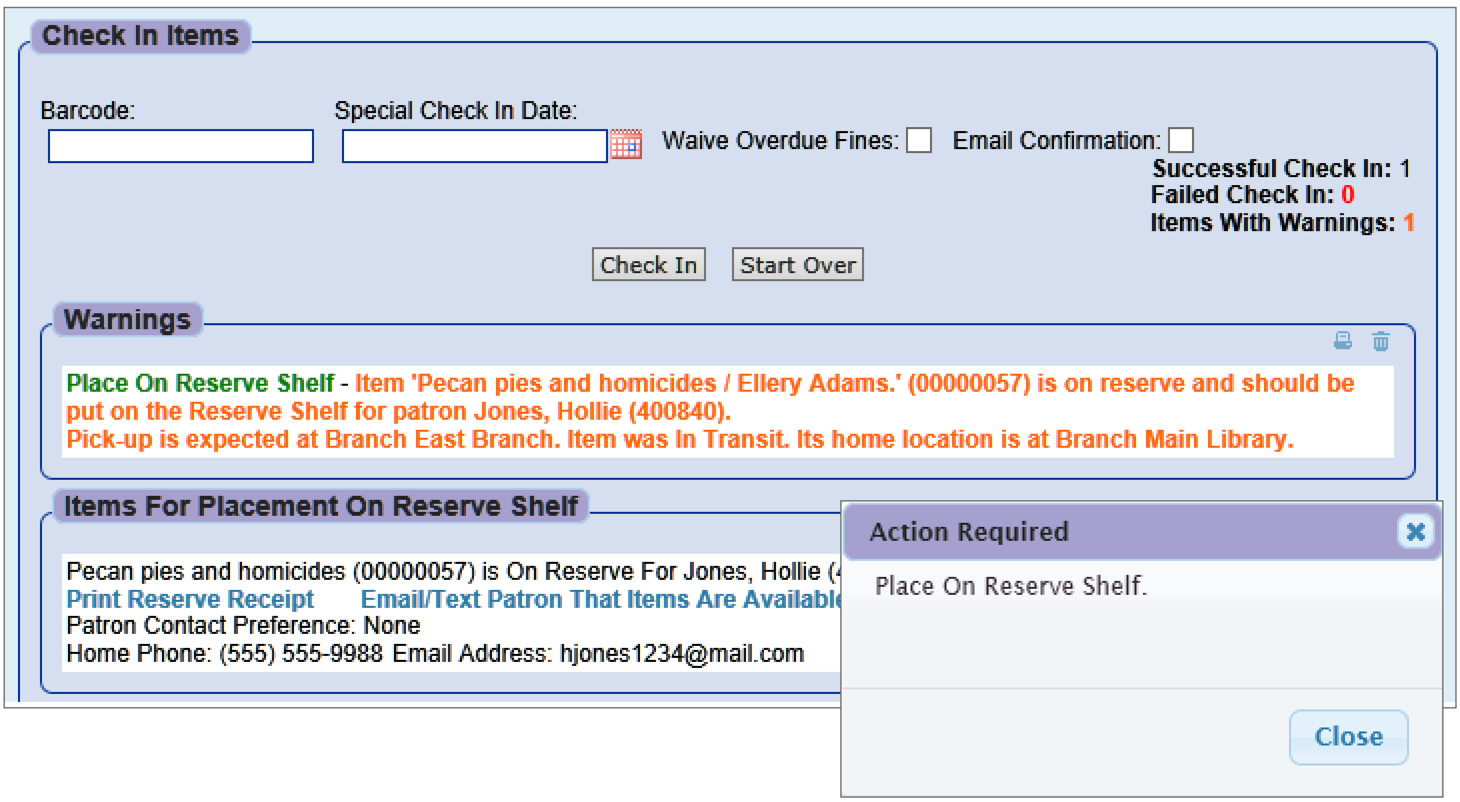
Simplified Action Required Notices on Check In

When an action is needed for an item being checked in, a green summary message displays before the warning so you can see at a glance what needs to be done. Messages display when items need to be sent to another branch (**Centralized** only), placed on the reserve shelf, returned to an **Interlibrary Loan** (**ILL**) location (requires an active license), or placed back in your library’s stacks after returning from another branch.

These green messages display by default. To see additional pop-up notifications, you can enable a circulation setting.

To enable pop-up action notifications

1. Click **Administration** from Atriuum’s **Menu Bar**, and then click **Circulation**.
2. Click Circulation Settings.
3. Next to **Pop-Up Action Notifications On Check In:** (first section of settings), click **Yes**.
4. Click **Save**.



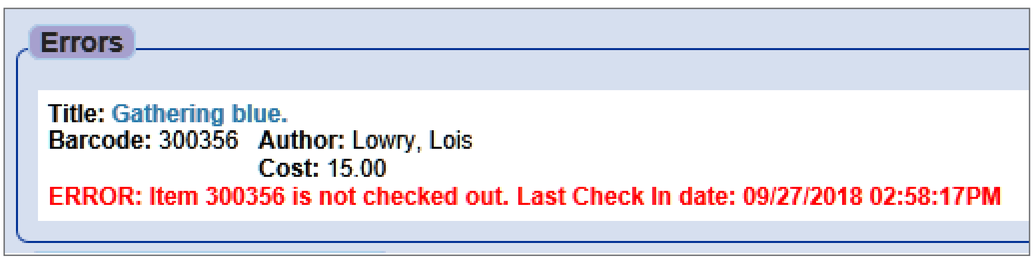
Check In Errors and Warnings for Items Not Checked Out

Since many libraries use check in to monitor an item’s status, a new circulation setting allows you to specify whether you want to see an Error, a Warning, or an In-House Use alert when items are scanned that were not previously checked out. Depending on your library’s workflow it may or may not be common practice to scan these items, so you can choose an alert that reflects the level of concern in this situation. Warnings are simply for reference, In-House Use adds to library statistics, and Errors alert you that something is wrong.

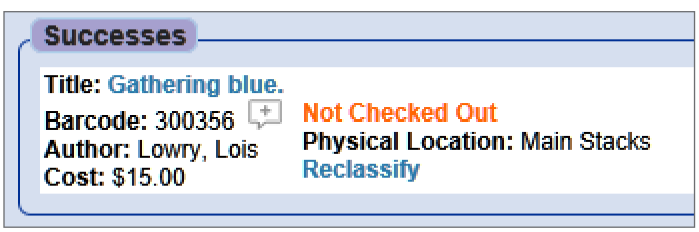
To choose a setting preference

1. Click **Administration** from Atriuum’s **Menu Bar**, and then click **Circulation**.
2. Click **Circulation Settings**.
3. Next to **Treat Checked In Items When Not Checked Out As:**, click to select **Error**, **Warning**, or **In-House Use**.
4. Click **Save**.

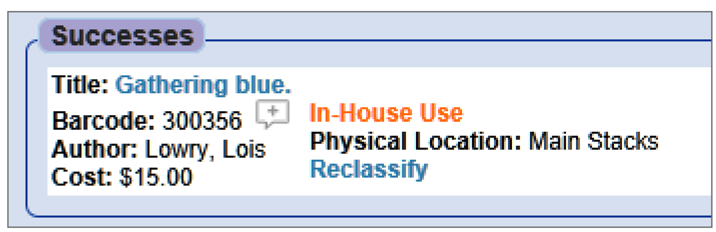
The images below show what you will see for each of the options.



Error



Warning



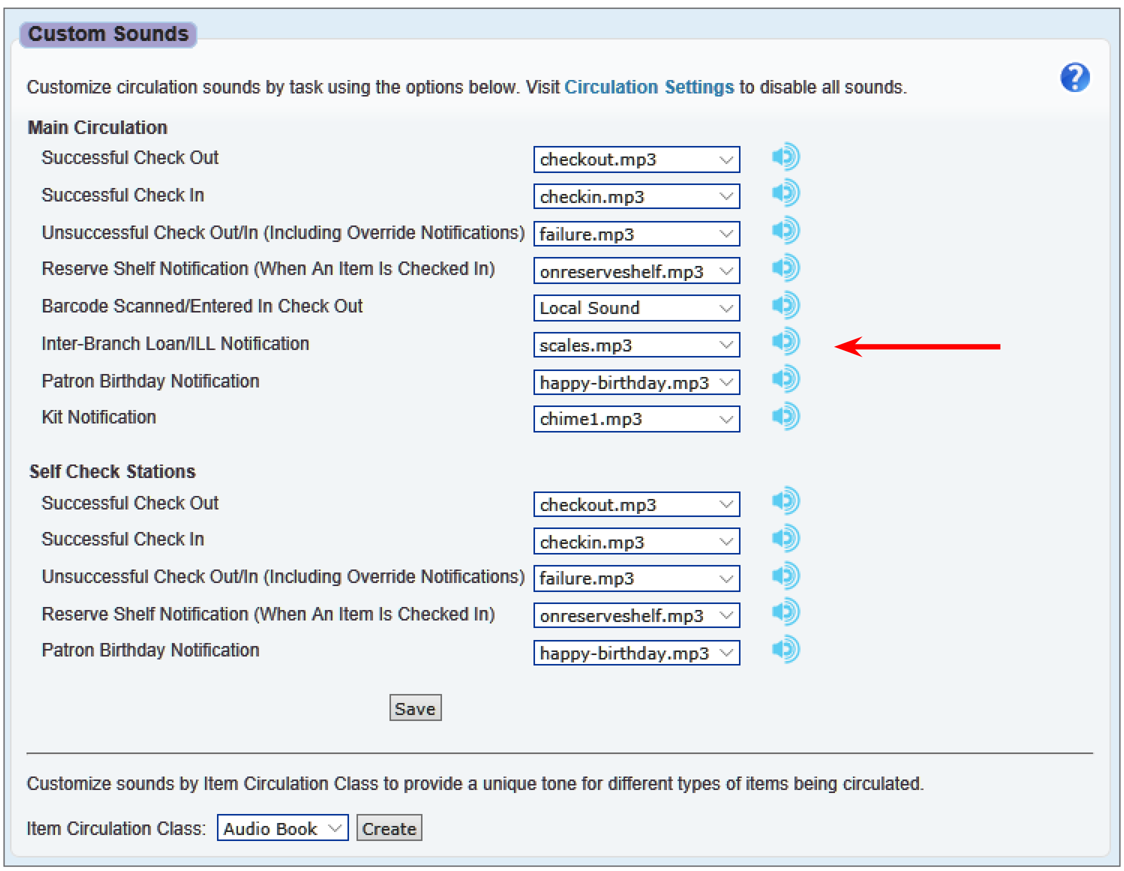
In-House Use

Custom Sounds for Inter-Branch/ILL Items

If you move items frequently between branches (**Centralized** only) or process a lot of **ILL** transactions (requires active license), you can add a custom sound to alert circulation workers that a checked in item needs to be sent to another branch or returned to a lending library.

To add a custom sound

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Library**.
2. Click **Custom Sounds**.
3. Next to **Inter-Branch Loan/ILL Notification**, click the drop-down button, and click again to select an .mp3 file from the list. (To upload a unique sound from your computer, click ***Upload Local Sound***. Then navigate to the location of your saved sound, click **Open**, and click **Save**.)
4. Click **Save**. **Successes** and **errors** display as they apply.
5. During check in (**Circulation Menu** and **Circulation Desk**), the sound will alert staff that an action needs to be taken regarding the item.



Improved Reserves Workflow for Inter-Branch Loans (Centralized only)

If you would like to streamline the inter-branch loan process, new settings allow you reserve items at another branch without an override and to update items' status with a single scan.

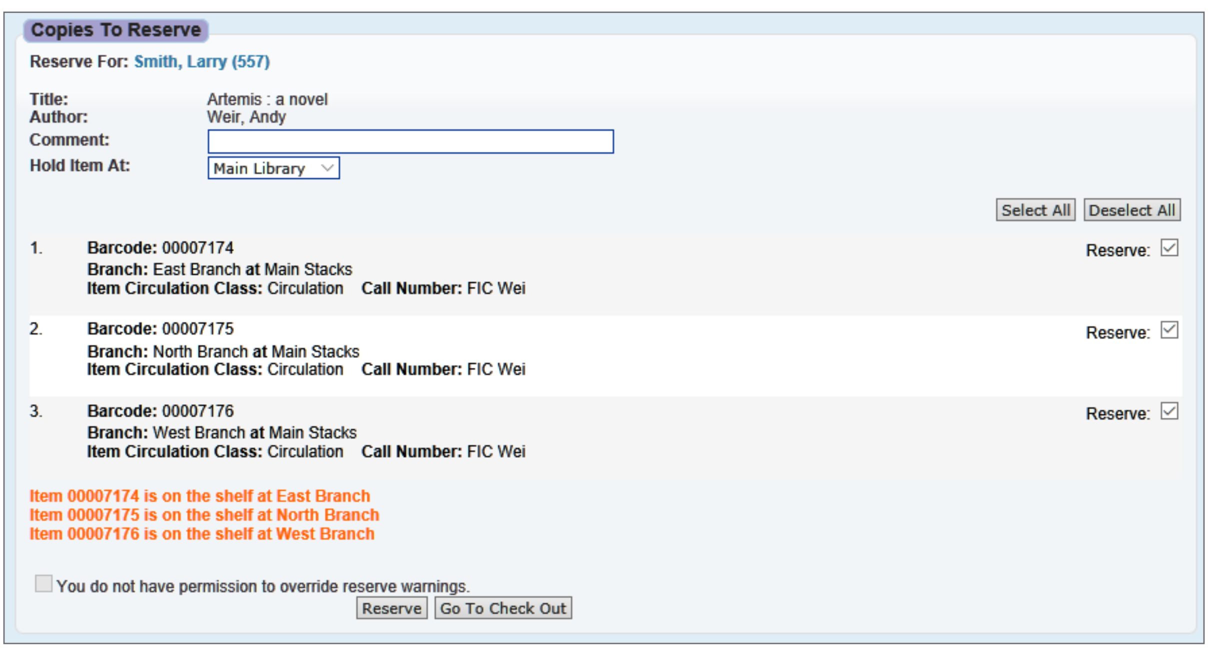
To enable the settings

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Circulation**.
2. Click **Circulation Settings**.
3. In the first section of settings, next to **Treat Checked In Items When Not Checked Out As:**, click **Warning**. (This is recommended to prevent seeing errors as items move between branches.)
4. Under *Branch Settings*, click **Yes** next to **Allow Reservation Without Override When Item Is At Another Branch**.
5. Under *Inter-Branch Loan Settings*, click **Yes** next to **Automatically Mark 'In Transit' If Reserve Pickup Or Home Location Is Another Branch**.
6. Click **Save**.

Workflow Example

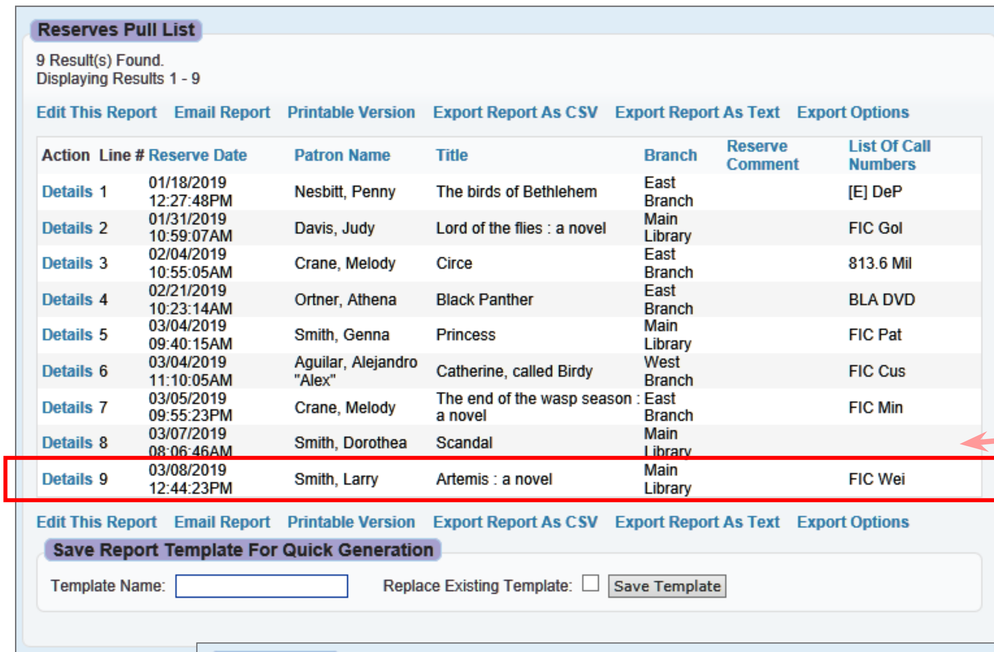
Here, we cover one scenario. A patron wants to reserve an item to be picked up at the Main Branch, but the Main Branch does not have a copy. The East, North, and West Branches each have a copy. One of those branches needs to pull the item from the shelf and send it to the Main Branch so that the patron can pick it up.

Margaret, the librarian at the Main Branch, creates a reserve for the item *Artemis: a novel* for patron Larry Smith. Copies of this item are available at the East, North, and West Branches.



At the East Branch, librarian Bonnie is ready to pull items from the shelves for her own branch's patrons as well as items that need to be sent to other branches. She uses the new **Reserves Pull List** report to create a list of all the items she needs to gather from the stacks (see "Reserves Pull List" on page 49).

1. Click **Reports** from Atriuum's **Menu Bar**.
2. Under **Patrons**, click **Pull List**. Click **Generate Report**.
3. The report shows all items the East Branch needs to collect. The **Branch** column indicates the patron's pickup location. Items only display on the list if your branch has an available copy that can fulfill the reserve.



Reserves Pull List

9 Result(s) Found.
Displaying Results 1 - 9

Edit This Report Email Report Printable Version Export Report As CSV Export Report As Text Export Options

Action	Line #	Reserve Date	Patron Name	Title	Branch	Reserve Comment	List Of Call Numbers
Details	1	01/18/2019 12:27:48PM	Nesbitt, Penny	The birds of Bethlehem	East Branch		[E] DeP
Details	2	01/31/2019 10:59:07AM	Davis, Judy	Lord of the flies : a novel	Main Library		FIC Gol
Details	3	02/04/2019 10:55:05AM	Crane, Melody	Circe	East Branch		813.6 Mil
Details	4	02/21/2019 10:23:14AM	Ortner, Athena	Black Panther	East Branch		BLA DVD
Details	5	03/04/2019 09:40:15AM	Smith, Genna	Princess	Main Library		FIC Pat
Details	6	03/04/2019 11:10:05AM	Aguilar, Alejandro "Alex"	Catherine, called Birdy	West Branch		FIC Cus
Details	7	03/05/2019 09:55:23PM	Crane, Melody	The end of the wasp season : a novel	East Branch		FIC Min
Details	8	03/07/2019 08:06:46AM	Smith, Dorothea	Scandal	Main Library		
Details	9	03/08/2019 12:44:23PM	Smith, Larry	Artemis : a novel	Main Library		FIC Wei

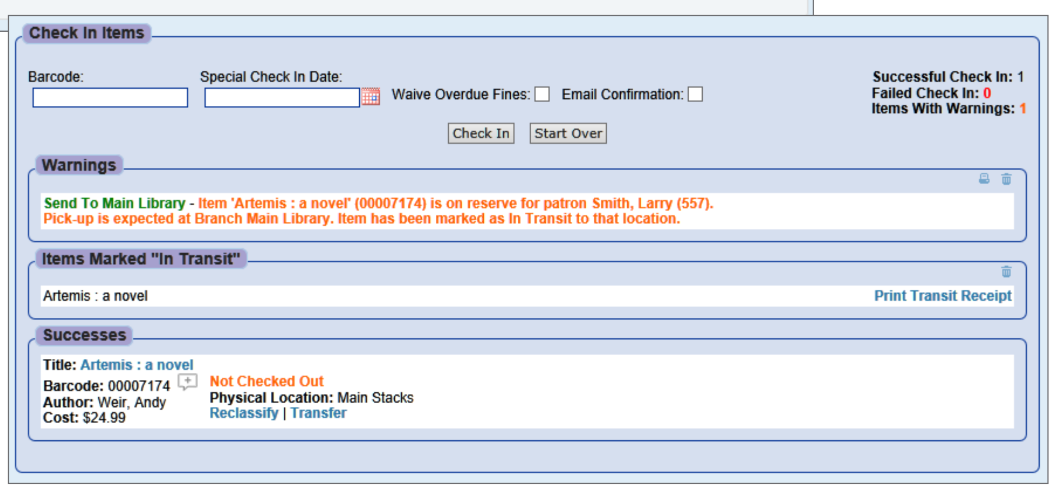
Edit This Report Email Report Printable Version Export Report As CSV Export Report As Text Export Options

Save Report Template For Quick Generation

Template Name: Replace Existing Template: Save Template

If a librarian at another branch has already agreed to send this item, it will not display in East Branch's list

She collects all the items on the list. To begin the transfer process, she simply needs to scan each item using the **Check In Items** form. She scans *Artemis: a novel*. A **message** tells her that this item should be sent to the Main Branch and its status has automatically been updated to **In Transit**. If she needs to, she can click **Print Transit Receipt** to include a printed slip with the destination (see "In-Transit Receipts for Inter-Branch Loans (Centralized only)" on page 23). She sets the book in a bin to be transported to the Main Branch. Atriuum flags the item as **Reserve Being Fulfilled** so that West and North branches do not send duplicate items.



Check In Items

Barcode: Special Check In Date: Waive Overdue Fines: Email Confirmation:

Successful Check In: 1
Failed Check In: 0
Items With Warnings: 1

Check In Start Over

Warnings

Send To Main Library - Item 'Artemis : a novel' (00007174) is on reserve for patron Smith, Larry (557). Pick-up is expected at Branch Main Library. Item has been marked as In Transit to that location.

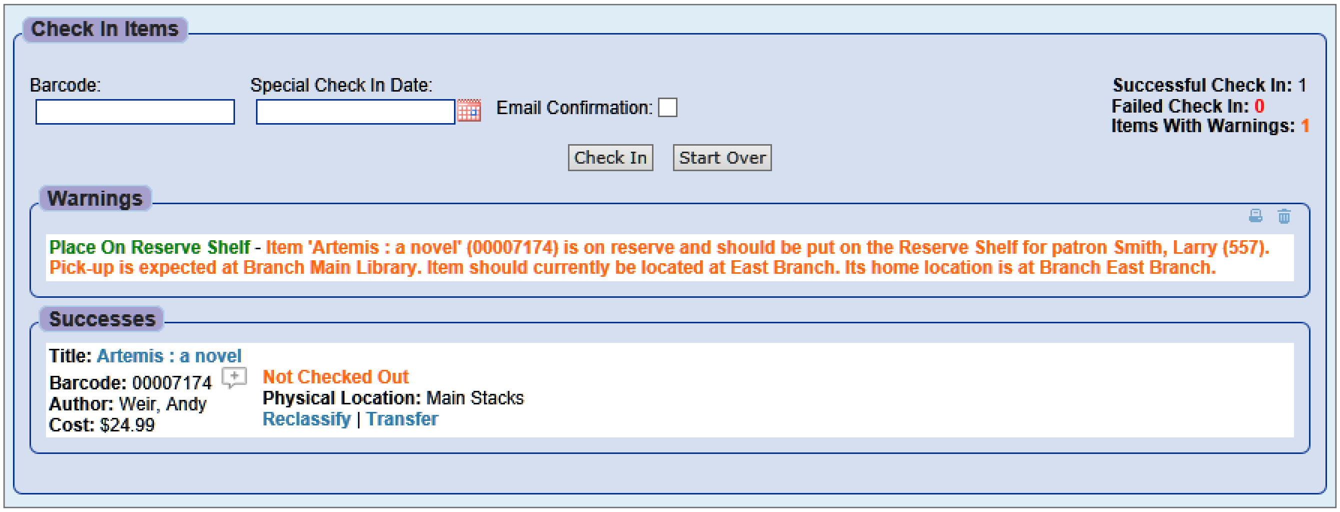
Items Marked "In Transit"

Artemis : a novel Print Transit Receipt

Successes

Title: Artemis : a novel
Barcode: 00007174
Author: Weir, Andy
Cost: $24.99
Not Checked Out
Physical Location: Main Stacks
Reclassify | Transfer

At the Main Branch, librarian Margaret receives the bin of items from East Branch. She scans each item using the **Check In Items** form. When she scans *Artemis: a novel*, she sees a warning telling her she needs to place this book on the Reserve Shelf for patron Larry Smith.

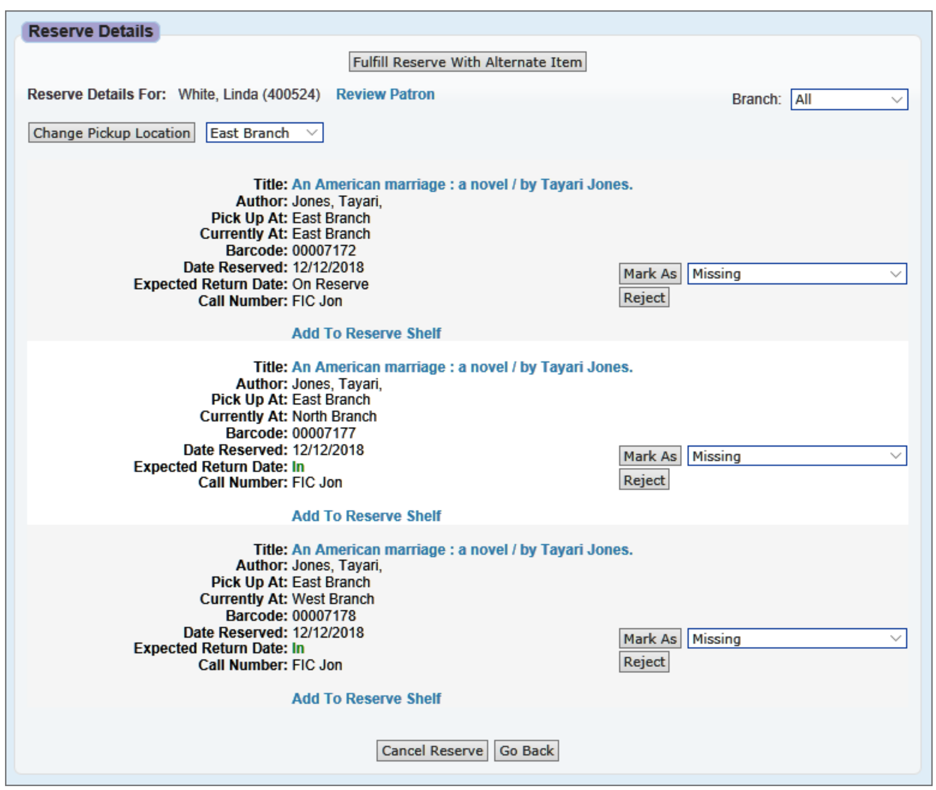


Special Scenarios

If you cannot locate your library's copy of a reserved item, or if you do not want to send it to another branch, you can use new options on the **Reserve Details** form to update the status. For example, you might not want to lend a popular title you prefer to keep for your own patrons.

If you are *unable* to fulfill a request, click the drop-down list, click to select a status, such as ***Missing***, and click **Mark As**.

If you are *unwilling* to fulfill the request, click **Reject**. If all copies are removed, the reservation is deleted and the patron will be notified that their reserve could not be fulfilled (based on settings).

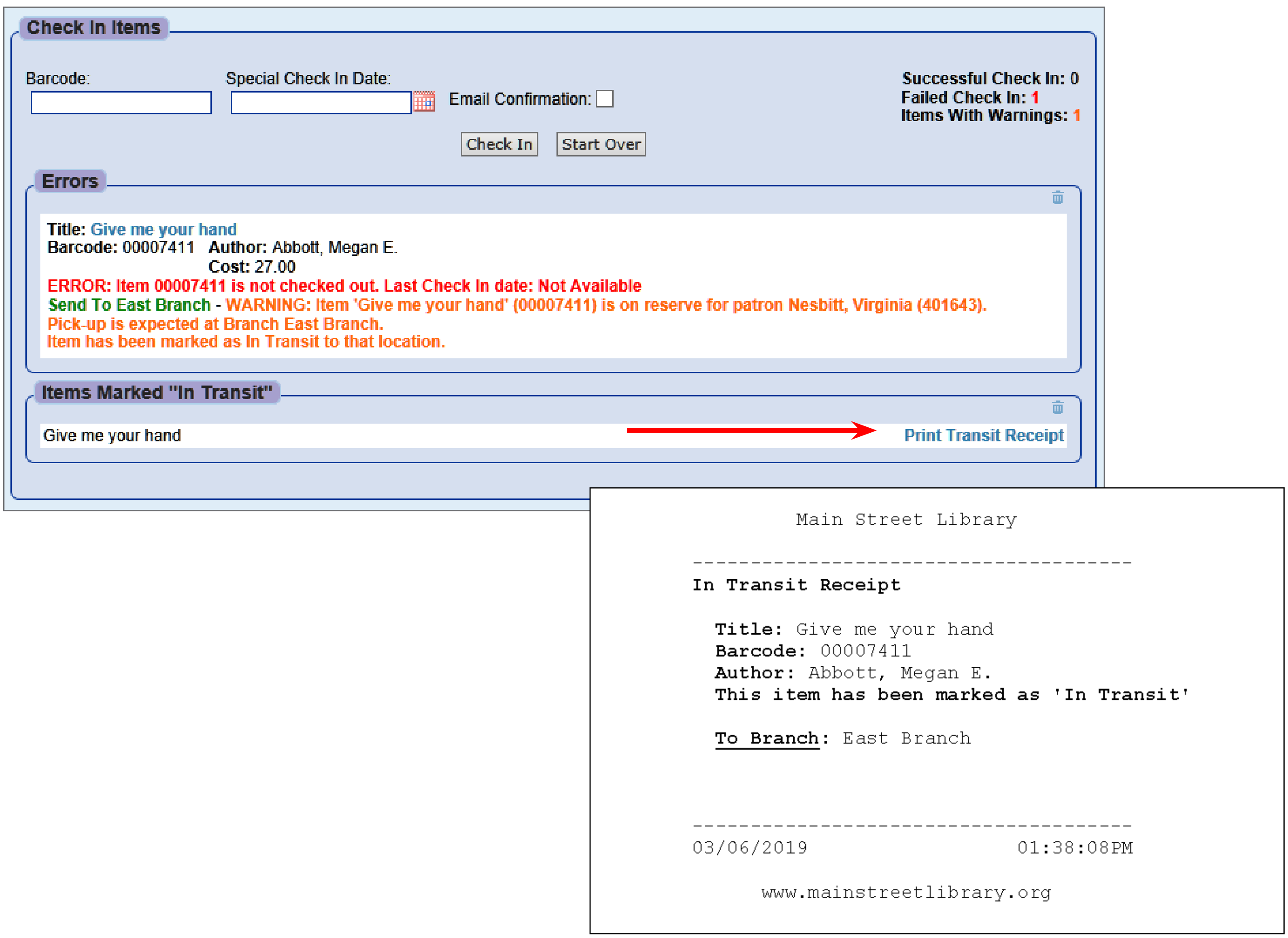


In-Transit Receipts for Inter-Branch Loans (Centralized only)

If you frequently move items between branches to fulfill patron reserves and automatically update their status when in transit, you can print a receipt to accompany the item to the new location.

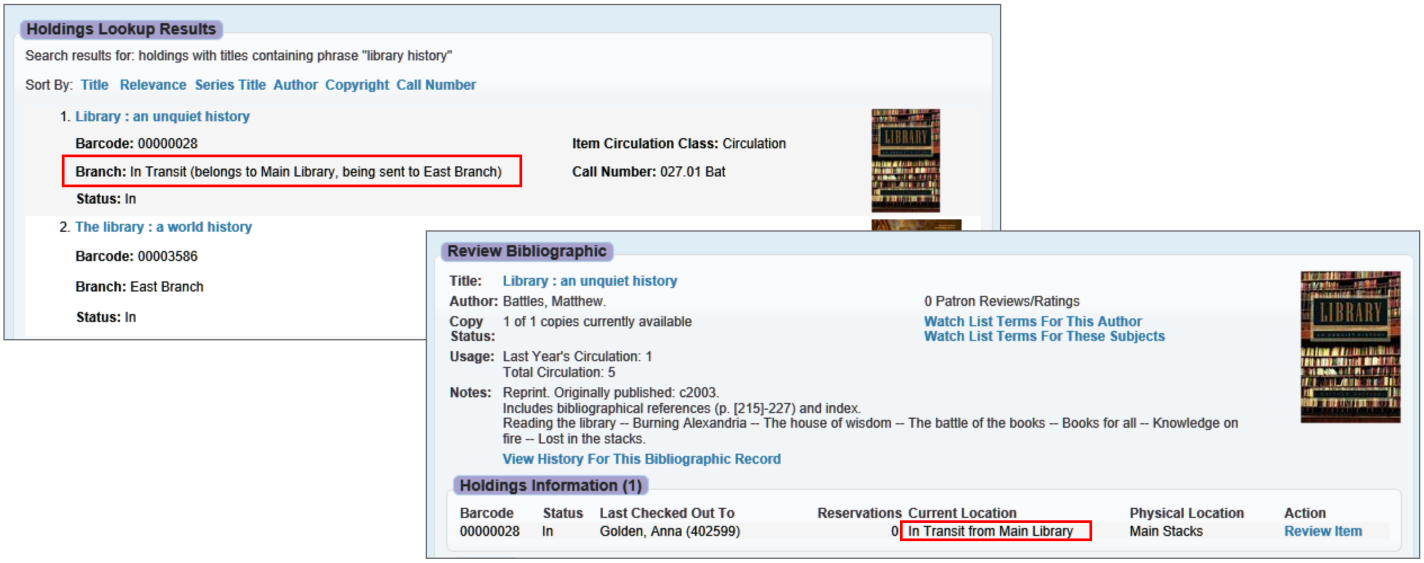
To enable the setting and print transit receipts

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Circulation**.
2. Click Circulation Settings.
3. Under *Inter-Branch Loan Settings*, click **Yes** next to **Automatically Mark 'In Transit' If Reserve Pickup Or Home Location Is Another Branch:**.
4. Click **Save**.
5. When a checked in item needs to be sent elsewhere, a link displays to **Print Transit Receipt**.
6. Click the link to open a preview of the receipt and printing options (based on your browser).



See Locations When Reviewing Bibliographic and Holdings Records (Centralized only)

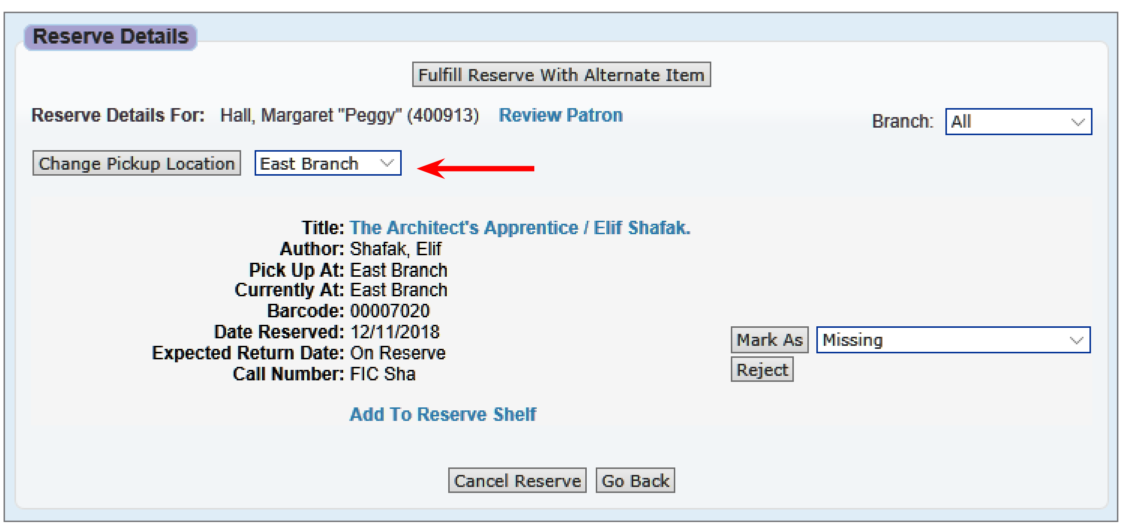
If an item is not at its home location, it is easy to see where it is currently held from the holding or bibliographic record. Status, home branch, and destination information display in holdings lookup results, and current location for each copy displays on the **Review Bibliographic** form and other applicable forms.



Edit Reserve Location (Centralized only)

If a patron mistakenly chose the wrong branch for pickup or needs to pick the item up at another location, the reservation can be edited from the librarian side of Atriuum. The location can be changed using the **Reserve Details** form, which is accessible by clicking Reserve Details from the **Review Patron** or **Review Item** form or Details on the **Reserves Pull List** report.

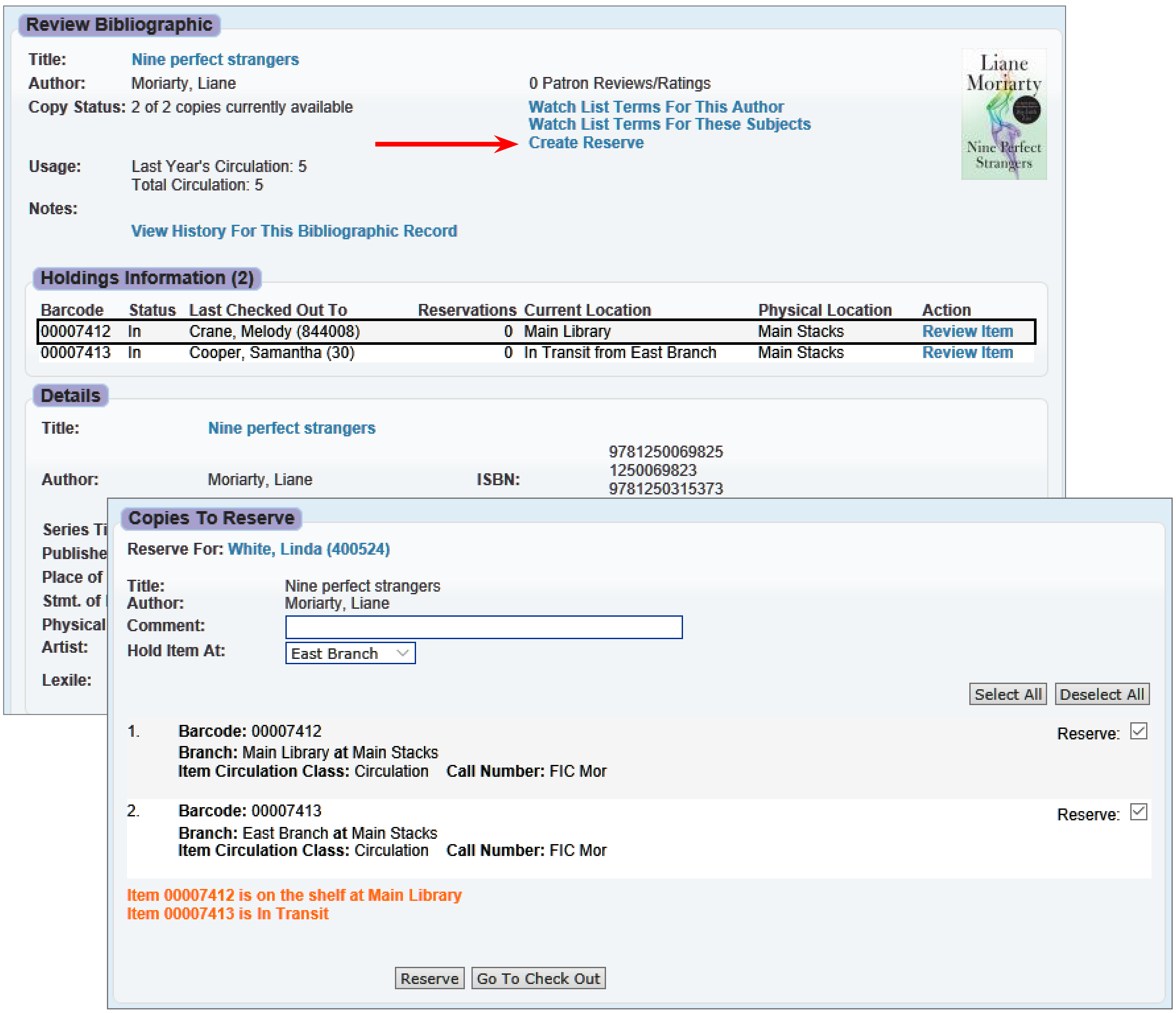
Simply click the drop-down button, and click again to select a different branch. Then, click **Change Pickup Location**.



Create Reserve Link on Review Bibliographic

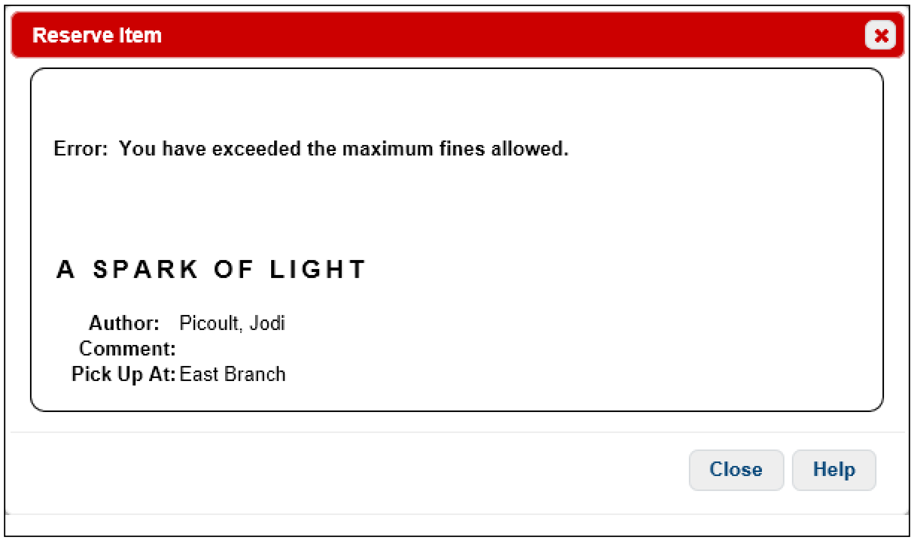
If you have looked up a title for a patron to locate available copies, you can use a link on the **Review Bibliographic** form to begin the reserve process.

Click **Create Reserve** to begin searching for a patron and creating a reserve.



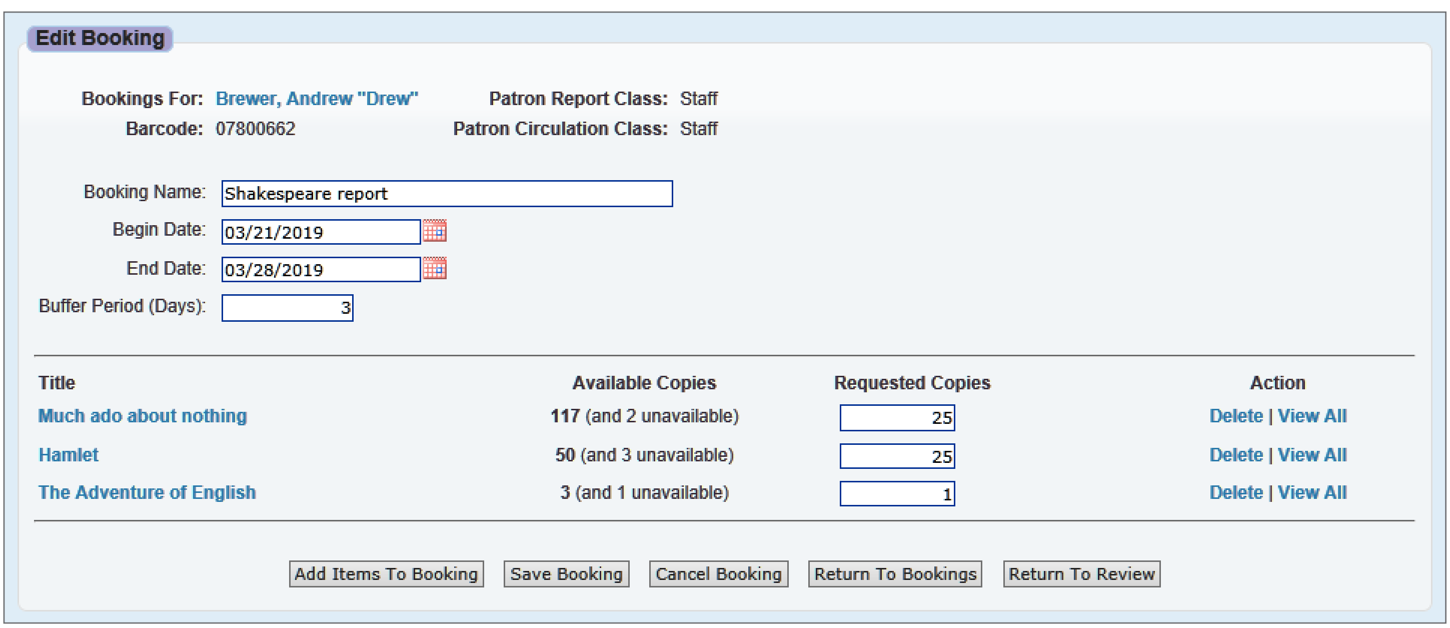
Place Block on Reservations for Fine Limits

Now, if patrons have accumulated enough fines to block them from checking out items, they cannot reserve items in OPAC. They will see the error message shown here. No additional setup is needed.



Bookings Show Available and Unavailable Copies

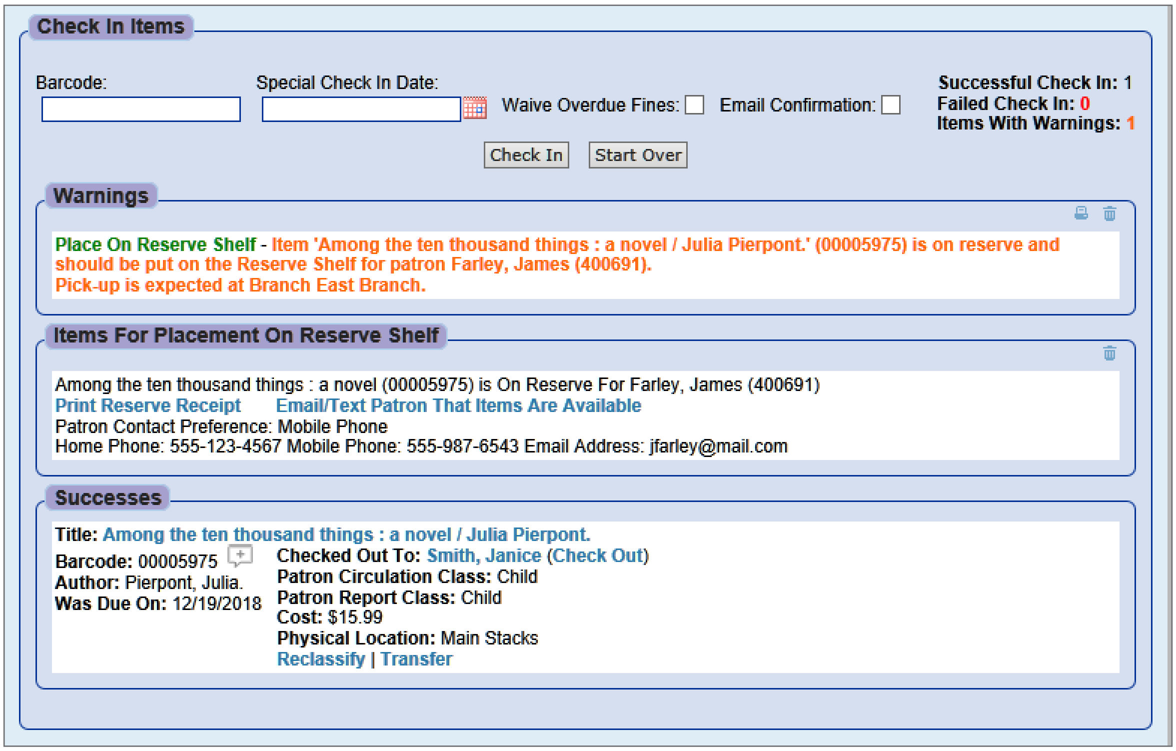
Bookings forms show the number of available and unavailable copies so you can see how many holdings are available to book. Unavailable copies are those that cannot be booked due to **Circulation Rules**. Items hidden from **OPAC** also reduce the number of available copies.

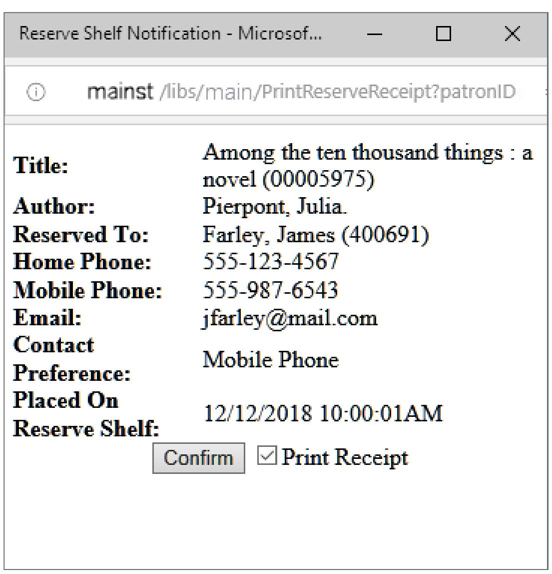


Improved Notifications

Mobile Phone Added to Check In Results

A patron's saved mobile phone number and other contact info now displays in the **Items For Placement On Reserve Shelf** form when a reserved item is checked in, saving you the step of looking up that information.





Email Address Added to Reserve Shelf Pop-Up

A patron's saved email address now displays on the **Reserve Shelf Notification** pop-up (based on **Circulation Settings**).

Automatic Notifications for Reserve Status Changes

A new circulation setting allows emails, text messages, and phone call notifications to be queued when a reserve's status changes, such as when an item is moved to the **Reserve Shelf** or when a reserve is cancelled.

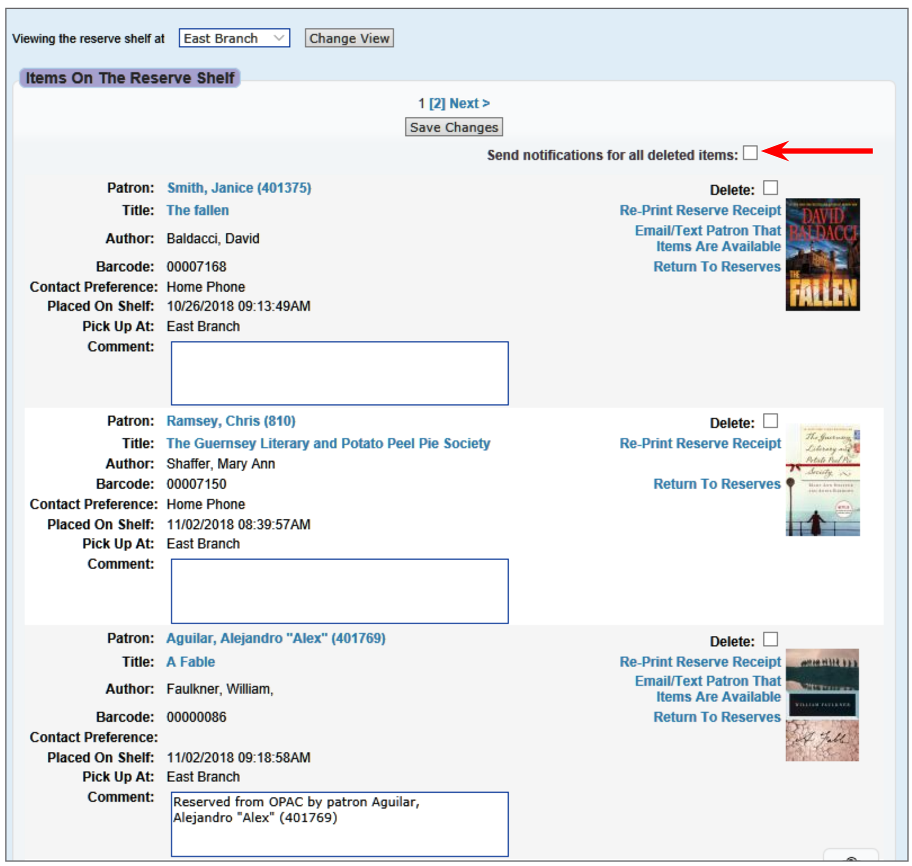
To enable automatic reserve status notifications

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:** (first section of settings), click **Yes**.
4. Click **Save** to keep your changes.

Manual Notifications for Reserve Shelf Cancellations

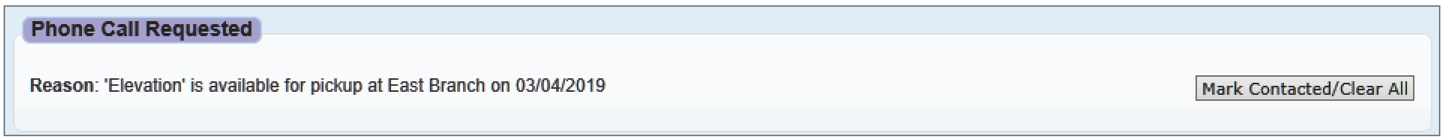
If you do not want to automatically notify patrons about every reserve status change but would like to send out notifications for cancelled reserves, you can do so manually when removing items from the **Reserve Shelf**.

1. Click **Circulation** from Atriuum's **Menu Bar**. Under **Reserve**, click **Reserve Shelf**.
2. On the **Items On The Reserve Shelf** form, click to select the **Send notifications for all deleted items:** check box.
3. Click to select the **Delete:** check box for any items you need to remove.
4. Click **Save Changes**. A **success** message displays, items are taken off the list, and patrons are sent notifications. Based on your patron and circulation settings, as well as what data is saved in the patron record, the notification may be an email or text message, or a **Phone Call Requested** notification may be added to the patron record.



Phone Call Notifications

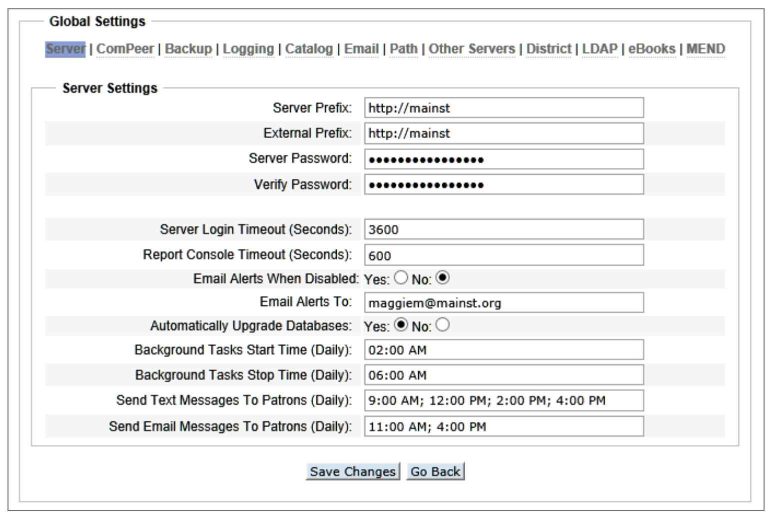
For patrons who do not have email but need to know the status of reserved items, a form displays at the top of the **Patron Information** form alerting you that this patron needs to be called (contact preference must be a phone number). Notifications also display during circulation; the **Phone Call Requested** form displays on the **Batch Check Out Items** form, and a phone icon displays when using the **Circulation Desk**. You must enable the **Automatically Notify When Reserve Status Changes:** setting for these notifications to be queued.



You can also use a new standard report to see a list of patrons who need to be notified by phone. For more information on this report, see “Phone Call Requests Report” on page 50.

Text and Email Notification Improvements

Text and emails can now be sent at multiple times a day so that your patrons always have the most up-to-date information on their reserves and other statuses. To update your preferences, you need to modify a server setting, so contact your system administrator or call Book Systems Tech Support.



The related server setting has been split, and different times can be entered separated by semicolons. By default, these customized times for emails will be used rather than sending them when the overnight background tasks are completed. If you do not wish to use custom times to send emails, you must disable the related *patron setting*.

Action Items List

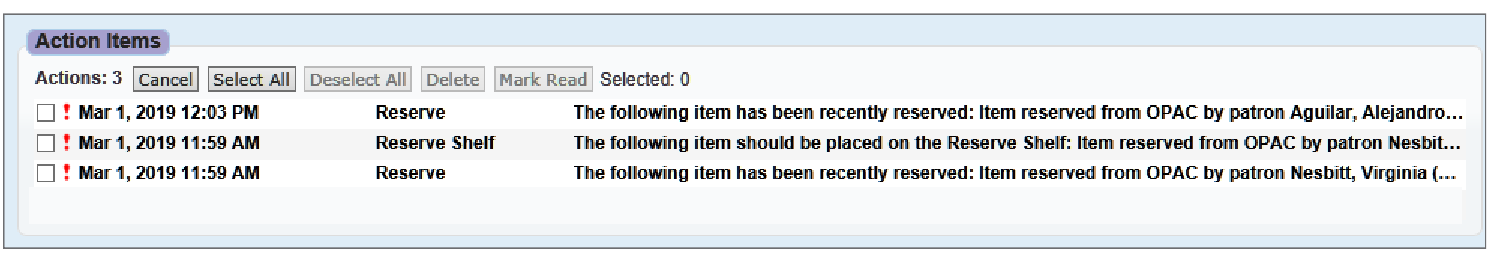
Action Items are notifications sent directly to the **Librarian Desktop** for patron **OPAC** reservations, **Reserve Shelf** additions and removals, and **Scheduled Reports**. These alert staff that an item needs to be pulled from the stacks to fulfill a hold or returned to the stacks if a reservation is cancelled. A clipboard icon displays the number of notifications; click to see details. Workers with the **Manage Action Items** *Administrator* permission will see Action Items about reserves. Any worker can see an Action Item for a scheduled report (no permission required).

The first time you use this feature, your browser will prompt you to allow your Atriuum site to show you notifications. You must allow this in order to see updated information.

You can also use this feature to push reports to individual workers' accounts rather than sending them to email addresses. This allows your workers to quickly see everything they need when the library is busy. For example, you could schedule the new **Reserves Pull List** report to be sent to workers each hour so reserves are processed in a timely fashion.

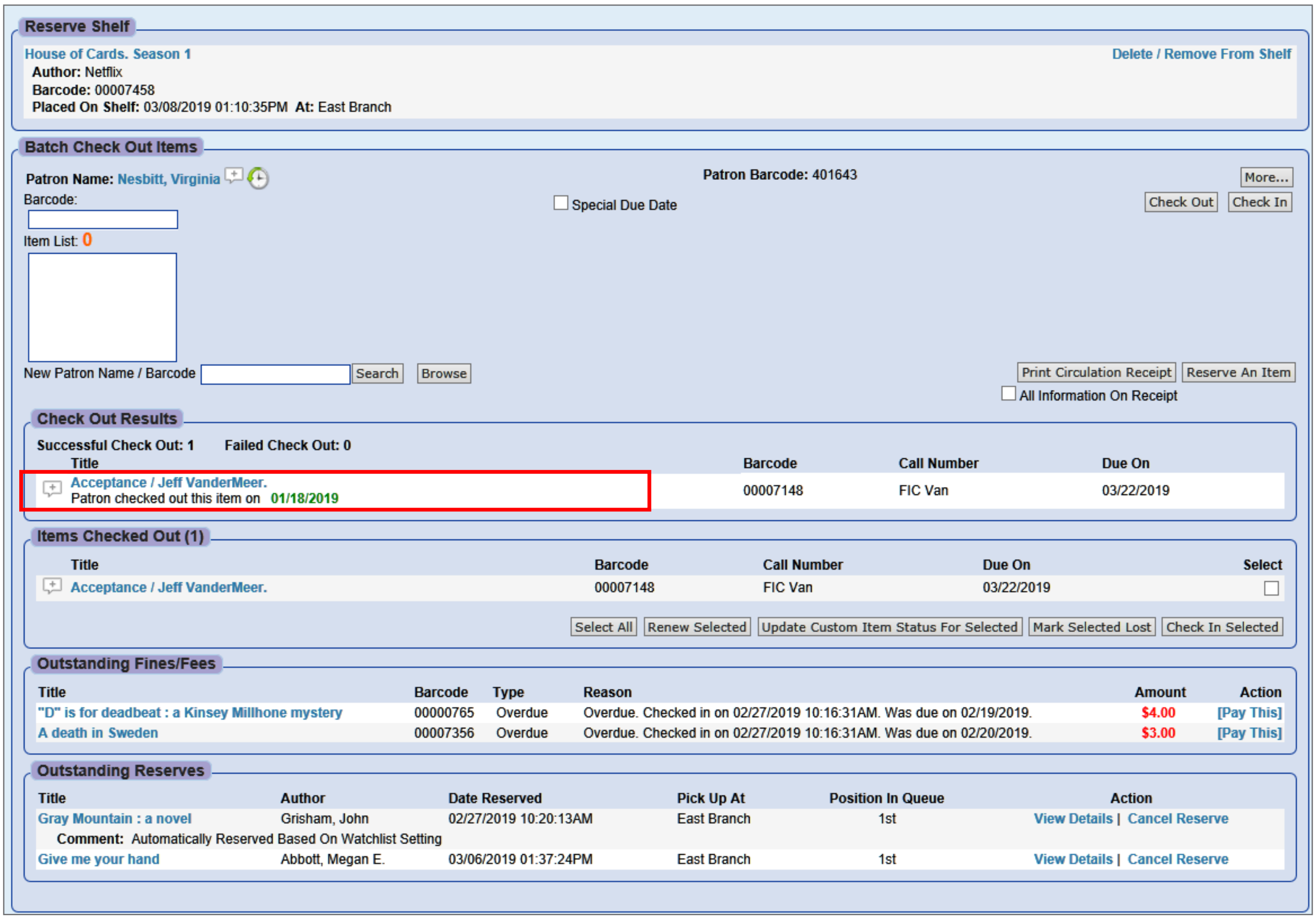
To manage action items

1. Click the clipboard icon to open the **Action Items** list.
2. Click **Manage Action Items**.
3. Click check boxes to select individual messages, or click **Select All** to choose all messages.
4. Click **Mark Read** to indicate messages have been viewed, or click **Delete** to permanently remove messages from the list.



Patron Checked Out This Item Before

Patrons can view a message that they have read a book before in **OPAC** (on the **Full Details** pop-up) and **Self Check Out Stations** (active license required). Now you as the librarian see this message automatically when you are checking out items. No additional setup is needed.



After checking out an item, a message displays in the **Check Out Results** form displaying the **date** the patron last borrowed the item. You can then ask the patron if they intended to borrow this item again or if they were unaware they had read it before.

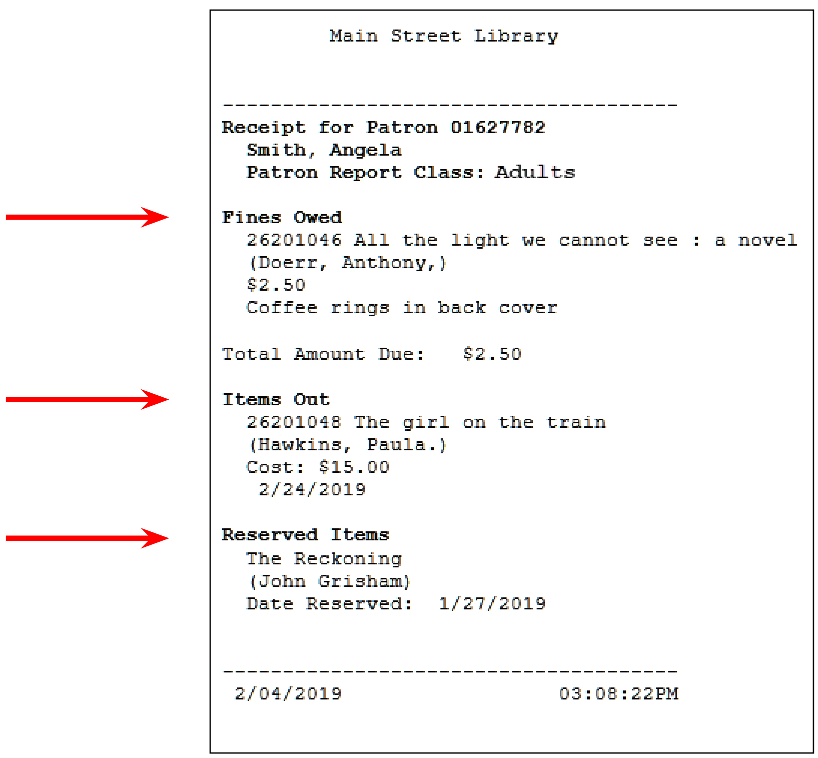
Current Status on Circulation Receipts

Patrons' current status includes checked out items, fines, and reserved items. The option to print this on receipts has been split into three settings, allowing you to further customize what is displayed.

At any time, you can override receipt settings and choose to show every piece of data on a patron receipt by clicking the **All Information On Receipt** check box during check out.

To customize Current Status printing options

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Circulation**.
2. Click **Circulation Settings**.
3. Under *Receipt Settings*, click to select/deselect the following options as needed:
    - **Print Checked Out Items Status On Receipts** - information for *all* items currently borrowed will be printed.
    - **Print Current Fine Status On Receipts** - information for *all* currently owed fines will be printed.
    - **Print Current Reserve Status On Receipts** - information for *all* currently reserved items will be printed.
4. Click **Save**.



```
         Main Street Library


--------------------------------------
Receipt for Patron 01627782
  Smith, Angela
  Patron Report Class: Adults

Fines Owed
  26201046 All the light we cannot see : a novel
  (Doerr, Anthony,)
  $2.50
  Coffee rings in back cover

Total Amount Due:   $2.50

Items Out
  26201048 The girl on the train
  (Hawkins, Paula.)
  Cost: $15.00
   2/24/2019

Reserved Items
  The Reckoning
  (John Grisham)
  Date Reserved:  1/27/2019


--------------------------------------
 2/04/2019                   03:08:22PM
```

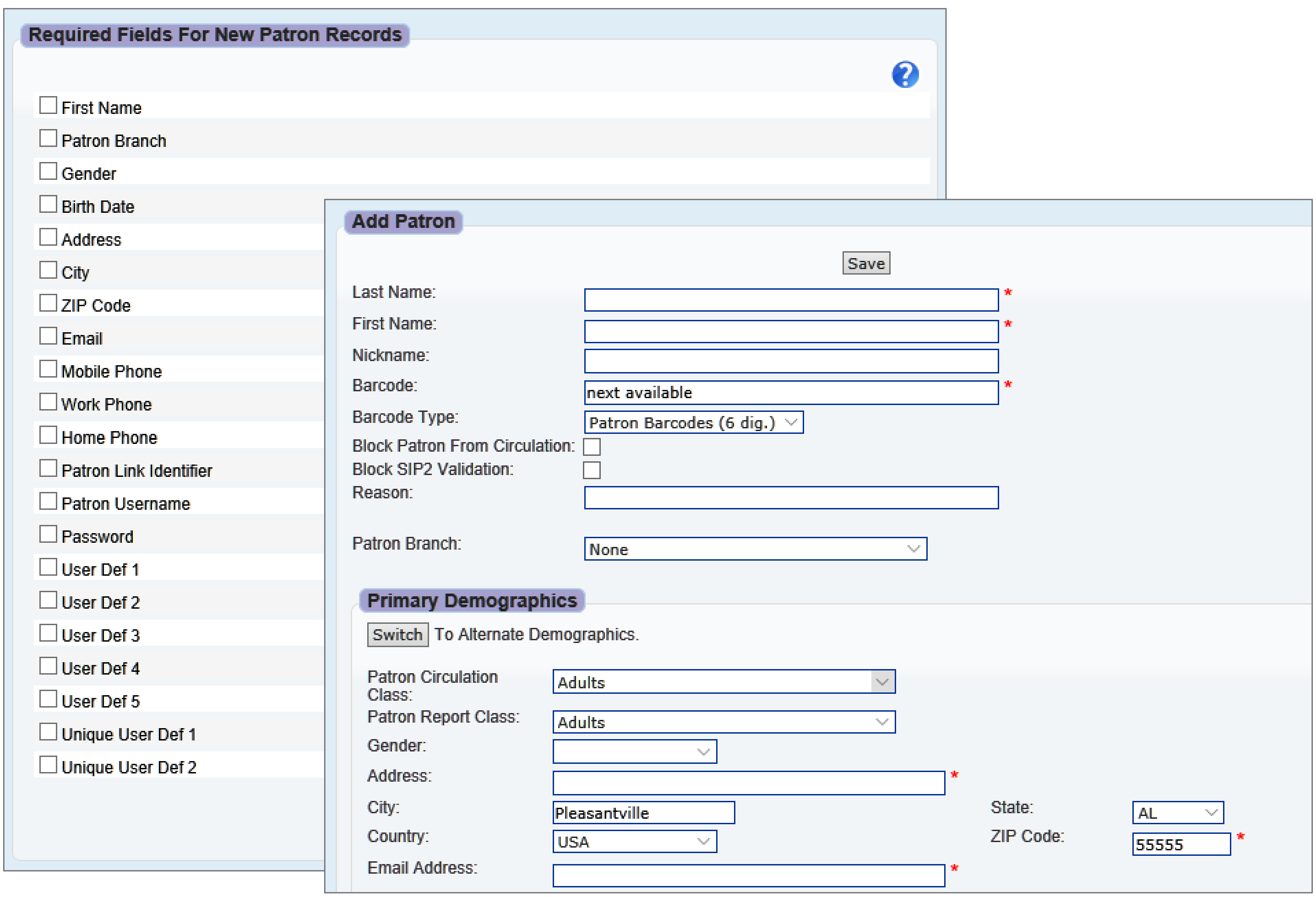
Patron Features

Required Fields For New Patron Records

To ensure your patron records are consistent and thorough, you can specify fields that must be completed in order to save a patron record. When adding a patron manually, the record cannot be saved unless all required fields are filled out (does not apply to patron imports). By default, patron last name and barcode are always required. When an existing patron record is edited, these mandatory fields must be completed before changes can be saved.

To establish required fields for patron records

1. Click **Administration** from Atriuum’s **Menu Bar**, and then click **Patrons**.
2. Click **Patron Required Fields**.
3. Click check boxes to select mandatory fields; then click **Save**.
4. When adding a patron record, required fields display with a red asterisk.

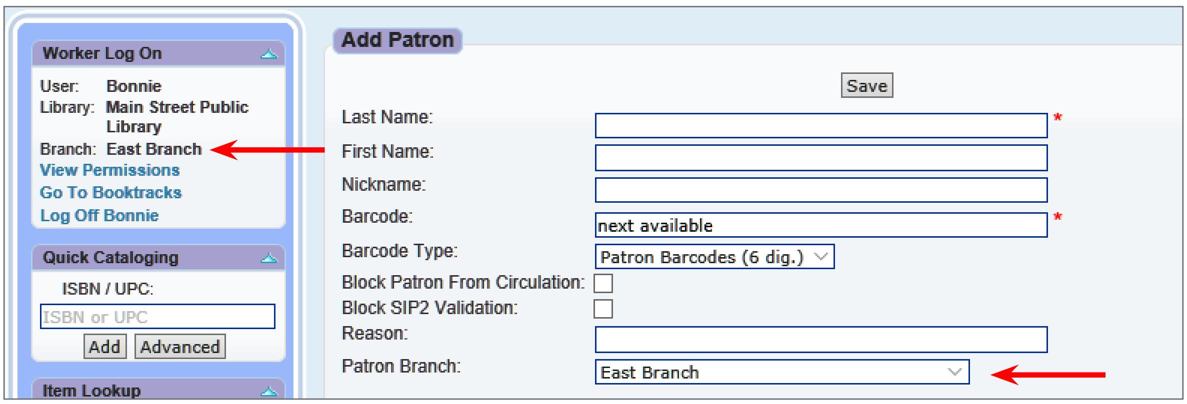


Default Patron Branch to Worker Branch

To save time when manually adding a new patron to the system, you can automatically assign the worker's logged on location as the patron's branch.

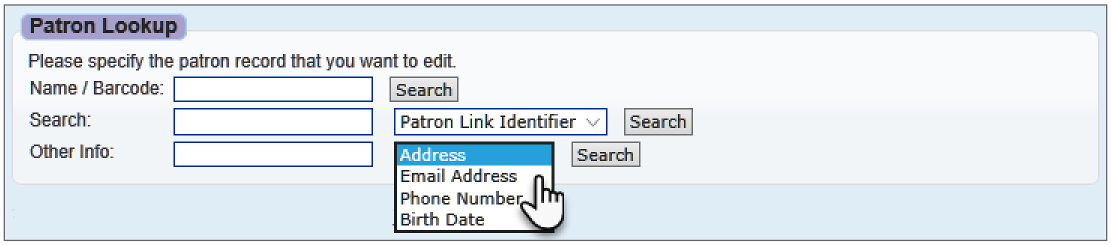
To assign patron branch by worker branch

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Patrons**.
2. Click Patron Settings.
3. Next to **Default Patron Branch To Worker Branch:**, click **Yes**.
4. Click **Save**.
5. When the **Add Patron** form opens, the worker's branch will be selected.



Patron Lookup by Birth Date or Email

There are two new ways to search for a patron using the **Patron Lookup** form. To search by birthday, click the drop-down button next to **Other Info:**, and click again to select **Birth Date**; enter a date in the field in the mm/dd/yyyy format, and click **Search**. To search by email address, click the drop-down button next to **Other Info:**, and click again to select **Email Address**; enter the address in the field, and click **Search**.



View History of Edits to the Patron Record

If you need to determine what change was made to a patron record, when, or by whom, you can now access a report of edits to a specific patron record (based on permissions).

Only changes to records made after your Atriuum upgrade will display in this report.

To view edit history

1. Click **Patrons** from Atriuum's **Menu Bar**; under **Patron**, click **Edit**.
2. Search for the patron record you need to examine.
3. On the **Edit Patron** form, click **Display Edit History** at the bottom of the **Other Info** form.
4. A list of changes made to the patron record displays along with the worker who made the edit and the old and new values of the field.


Patron Edit History

Linda White (400524).

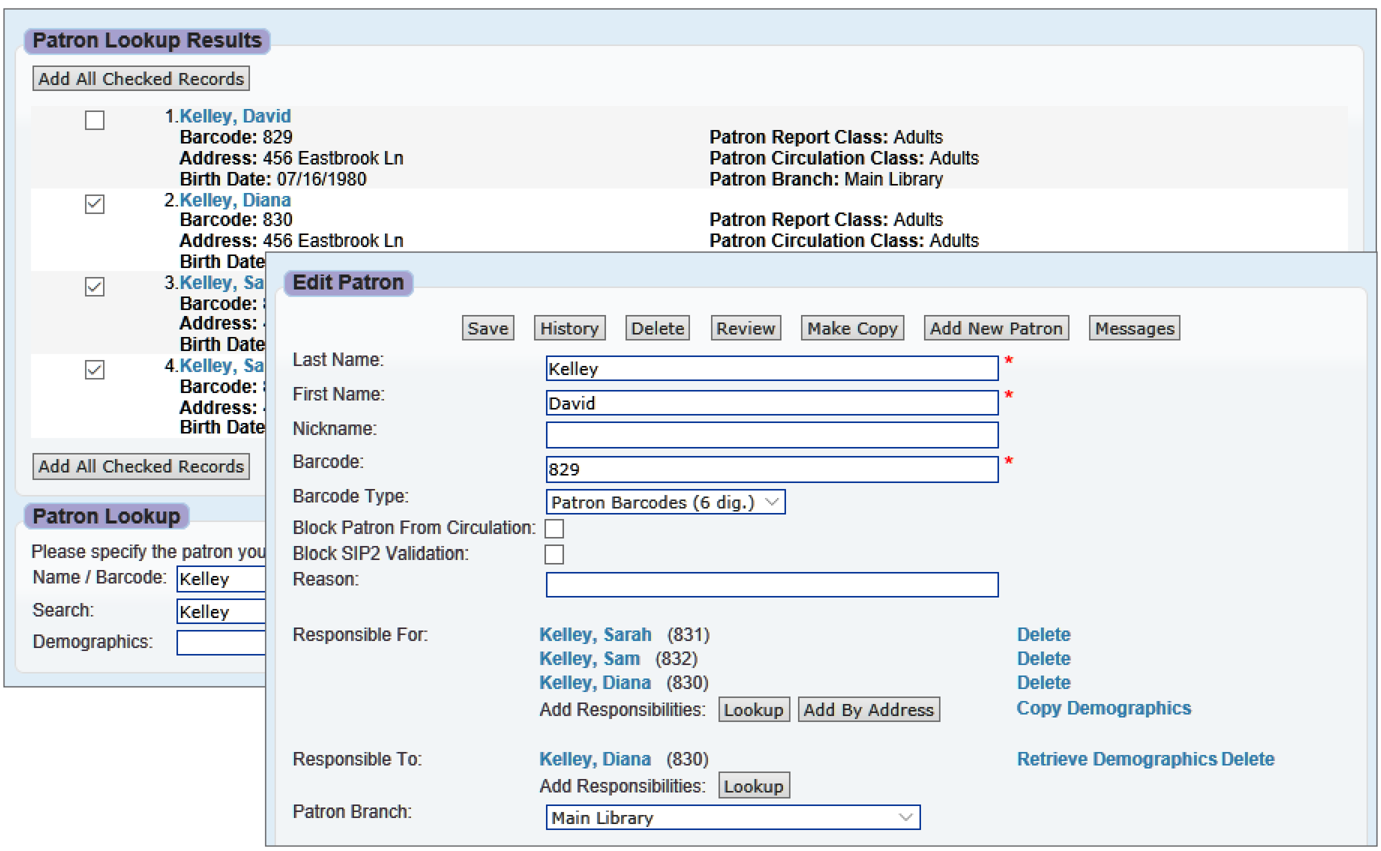
Date	Field	New Value	Old Value	Worker
11/28/2018 09:26:53AM	Primary City	Pleasantville	Glendale	Bonnie
11/28/2018 09:26:53AM	Primary Address	2567 Allandale Rd.	2567 Main Street	Bonnie
11/28/2018 09:24:21AM	Birth Date	03/12/1979		Bonnie
11/28/2018 09:24:21AM	Primary Email Address	lindawhite@mail.com		Bonnie

Patron Responsibility Setup

You can easily select all the members of a family when setting up responsibilities (**Responsible To** and **Responsible For**). This makes connecting patron records fast and convenient. You can also now add **Responsible To** information directly from the dependent's record rather than having to open the responsible party's record.

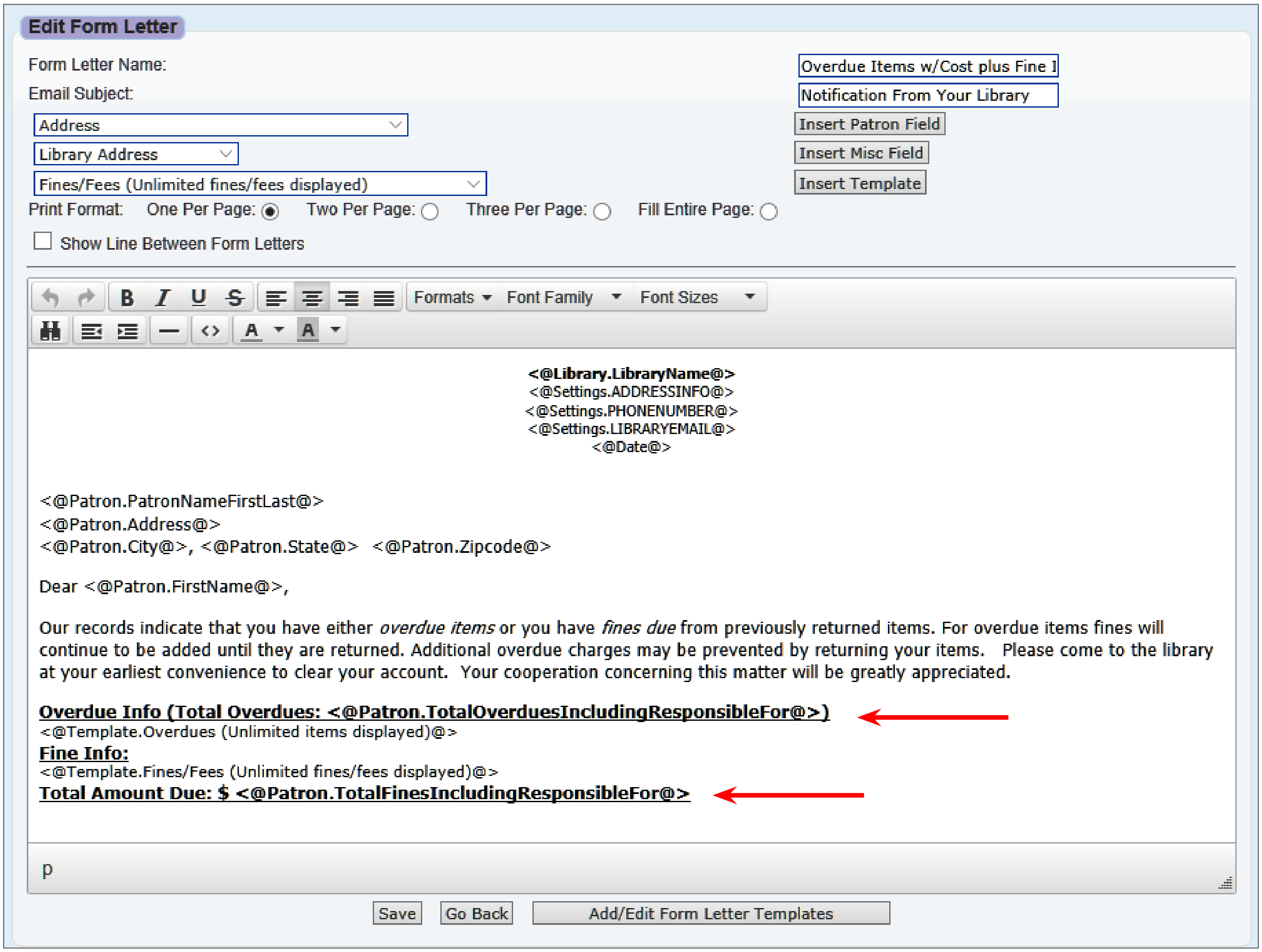
To add multiple patron responsibilities to one patron record

1. Click **Patrons** from Atriuum's **Menu Bar**.
2. Under **Patron**, click **Edit**. Search for the patron. The **Edit Patron** form displays.
3. Next to **Add Responsibilities:**, click **Lookup**.
4. Enter the last name of the family or a shared piece of information, such as an address or phone number.
5. The **Patron Lookup Results** form opens with a list of matching records.
6. Click the check box next to each name as applicable. When you have made your selections, click **Add All Checked Records**.
7. The **Edit Patron** form reopens with the newly added family members.



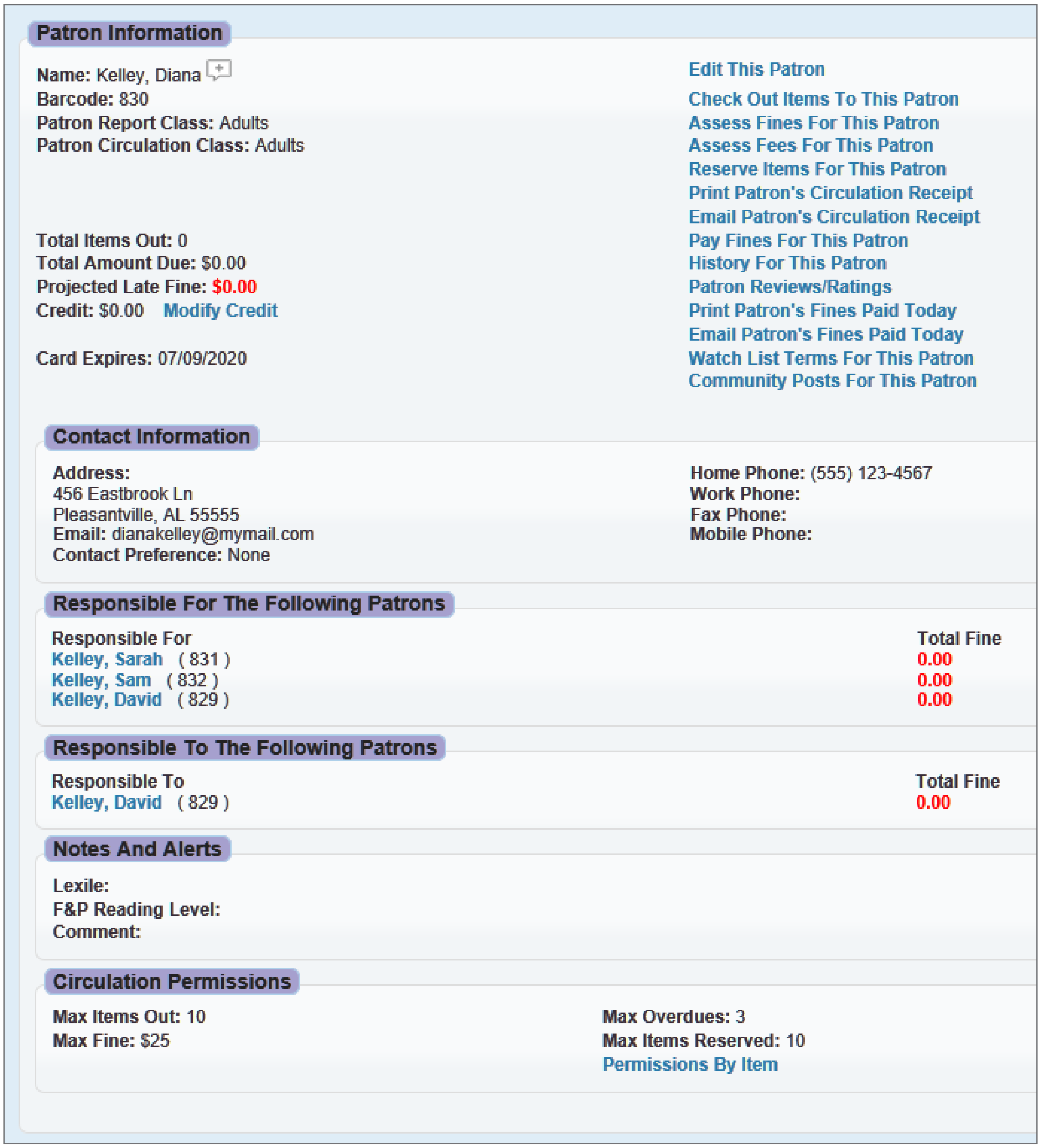
Patron Responsibility in Form Letters

Existing form letters have been updated to automatically include overdue items and fines/fees for patrons the recipient is responsible for, such as children or dependents (if responsibility is enabled). No additional setup is needed.



Patron Responsibility Moved Up on Patron Information

To make it easier to see patron responsibilities, the **Responsible For The Following Patrons** and **Responsible To The Following Patrons** forms have been moved up on the **Patron Information** form. They now display below **Contact Information** rather than at the bottom of the form.



New Contact Preference Option: Text

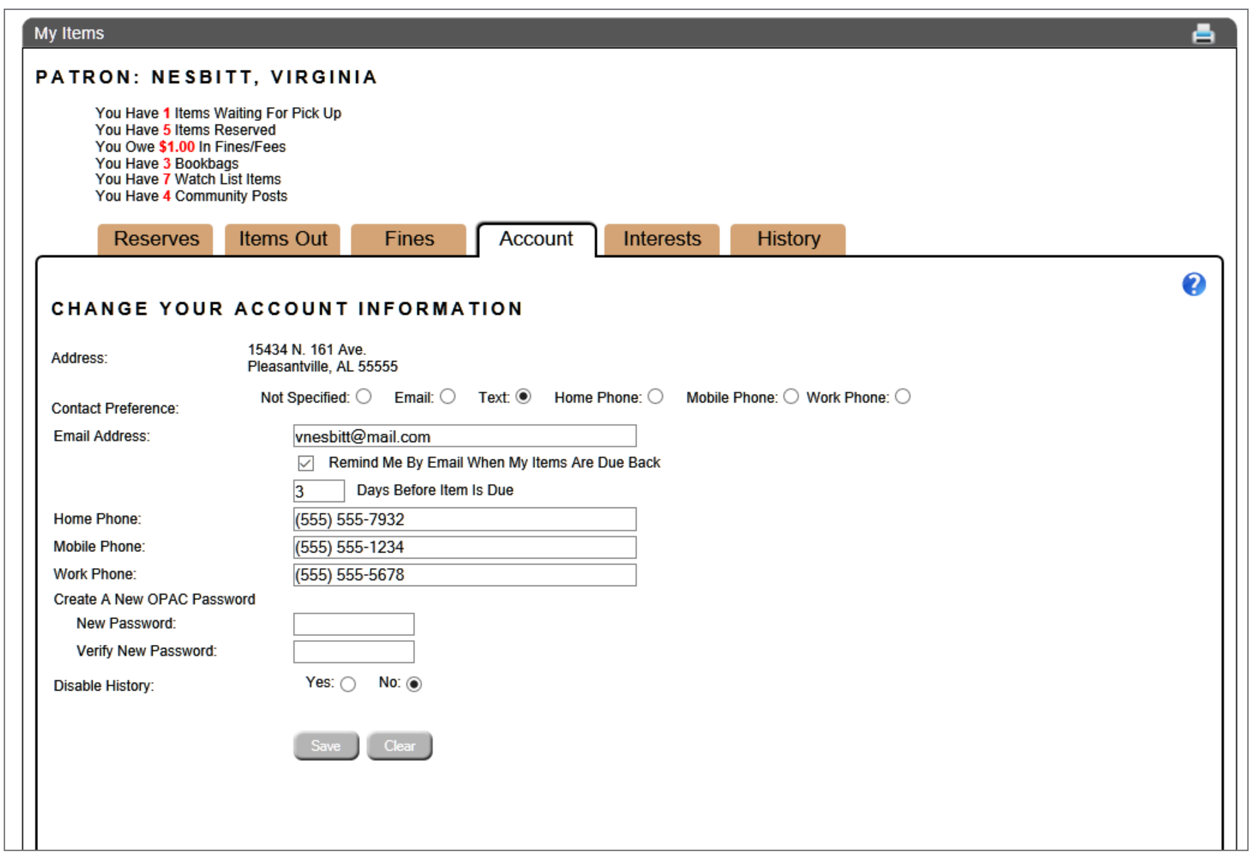
If your patrons prefer to be notified of reserved items or cancellations via text, you can now select this option on patron records. The **Enable Mobile Phone Text Messaging To Patrons:** setting must be enabled for notifications to be sent.

To specify a patron's preference

1. Click **Patrons** from Atriuum's **Menu Bar**.
2. Under **Patron**, click **Edit**. Search for the record you need to modify. The **Edit Patron** form displays.
3. In the **Other Info** section, next to **Contact Preference:**, click a radio button to select an option, such as ***Text***.

4. Click **Save** to keep your changes.

This option also displays in the **Account** tab of **My Items** if you allow patrons to change their account information from **OPAC** (**General And Patron Account Settings**).



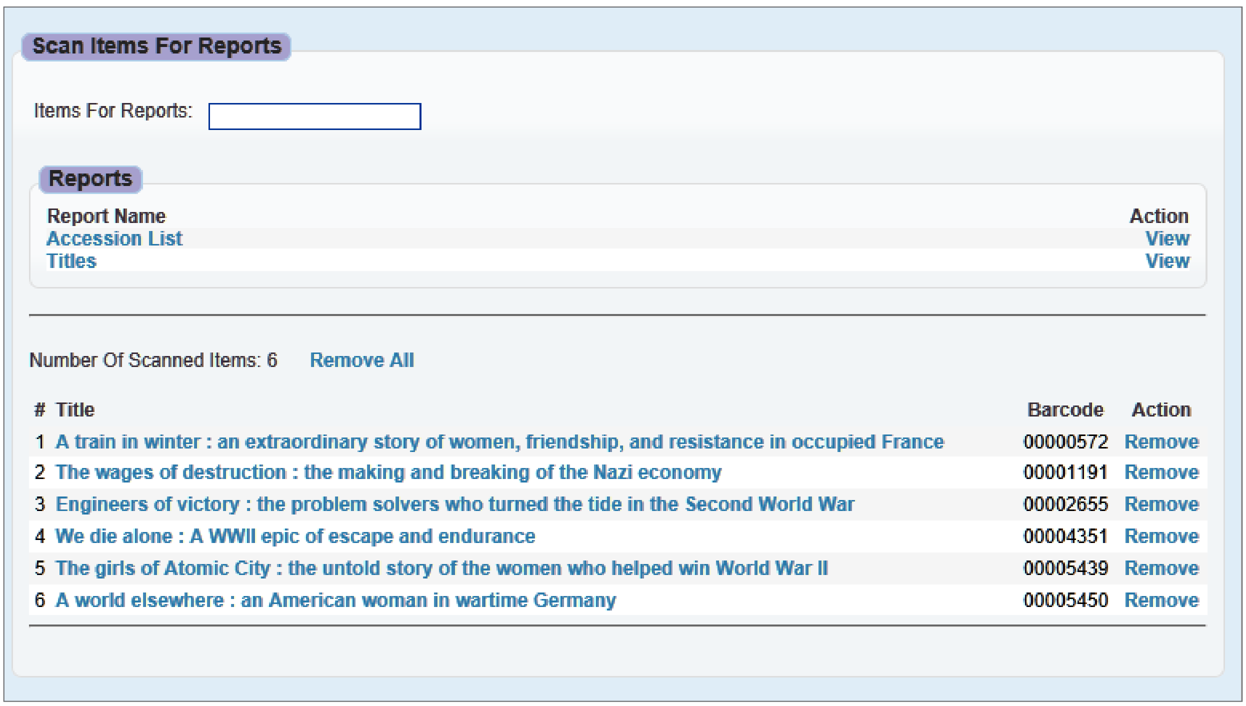
Report Features

Scanned Barcodes Report

If you have a group of items that represent a unique subset of an **Accession List** or **List Of Titles** report, you can scan each item to add it to a report. For instance, you might scan all the items in a topical display that come from different parts of the library.

To create a scanned barcode report

1. Click **Reports** from Atriuum’s **Menu Bar**.
2. Under **Utilities**, click **Scan Items For Reports**.
3. In the **Items For Reports:** field, scan the barcodes of the materials you need to add one at a time. After each addition, the list below refreshes to show the added title.
4. When you have added all the relevant items, click **View** in the **Action** column next to the report type you need to use.



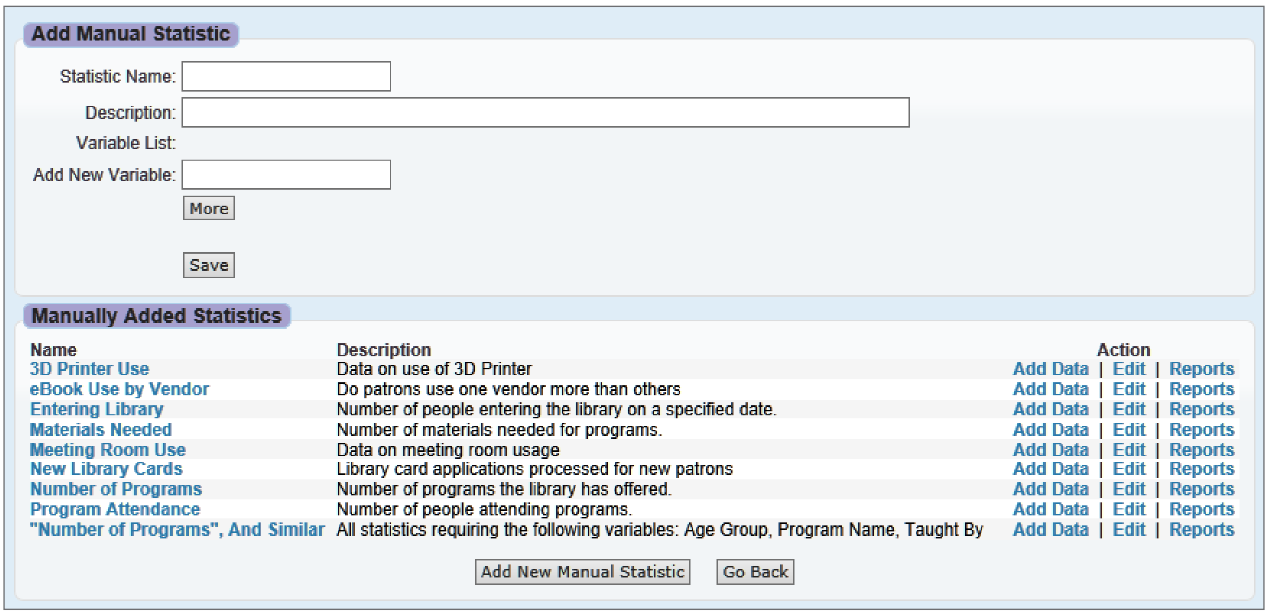
5. If you need to customize the report, click **Edit This Report**, modify your columns and sorts as needed, and click **Generate Report**.
6. To save this list for later, enter a name for this report in the **Template Name:** field, and click **Save Template**. This report can be accessed from the **Saved Report Templates** form.

Manual Statistics

If you need to keep track of unique information for local or state reporting purposes, you can now create your own manual statistics and store data within Atriuum.

To create a new statistic type

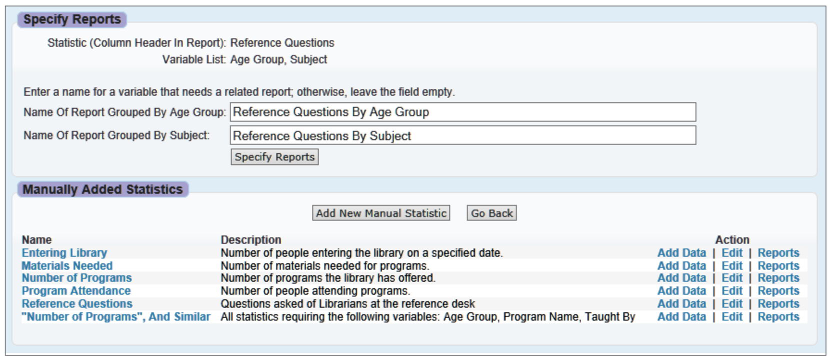
1. Click **Administration** from Atriuum’s **Menu Bar**, and then click **Circulation**.
2. Click Manually Added Statistics.
3. Click **Add New Manual Statistic**.



4. Enter a name for the statistic you want to track. This name becomes the field for the main numerical value associated with the statistic.
5. Enter a description for the statistic.
6. In the **Add New Variable:** field, enter a variable, such as ***Age Group***, that you want to track using reports.
7. To add more than one variable, click **More**, and enter up to five unique variables.
8. When you have added all the variables you need to track, click **Save**.

To add reports for this statistic type to Manual Statistics Reports

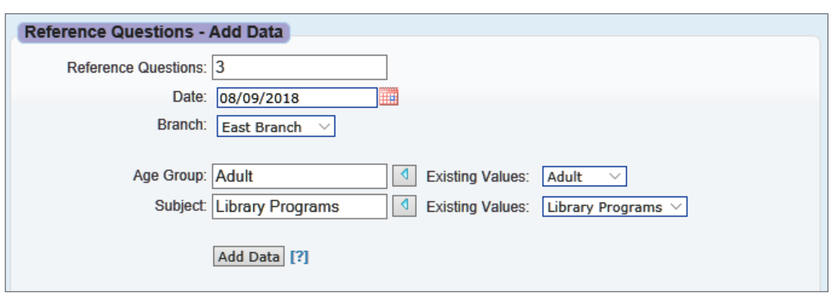
1. From the **Manually Added Statistics** form, click Reports in the **Action** column to open the **Specify Reports** form.
2. If you have more than one variable, enter a name for each report you would like to be able to view in the future. If you leave a field blank, a report by that grouping will not display on the **Manually Added Statistics** form.
3. Click **Specify Reports**.
4. These reports can now be accessed through the **Statistical Reports** form.



To enter data for a statistic

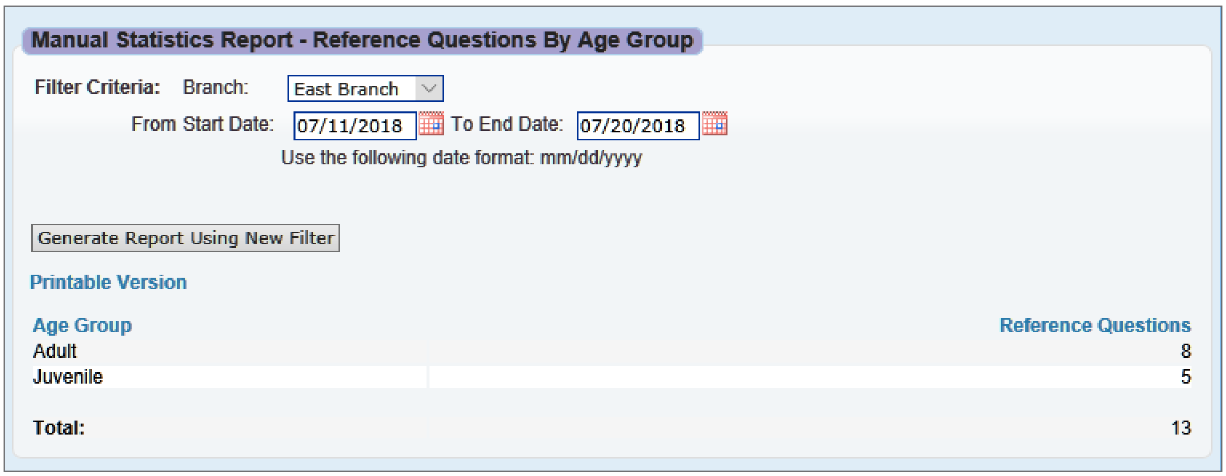
You may enter data daily, weekly, or at whatever interval you prefer for reporting purposes.

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Circulation**.
2. Click Manually Added Statistics.
3. Click the statistic name or Add Data for the statistic you want to record.
4. Next to the ***Statistic Name*** (**Reference Questions** in the example below), enter a numerical value.
5. Use the calendar icon to select the date the value corresponds with, or enter a date in the mm/dd/yyyy format.
6. If needed, select a different branch (**Centralized** only; defaults to your logged on location).
7. For the variables you created, enter a variable value, or select one from the list (only available after it has been entered previously).
8. Click **Add Data** to save this information for reporting purposes.



To view a Manual Statistics Report

1. Click **Reports** from Atriuum’s **Menu Bar**.
2. Under **Administration**, click **Statistical Reports**.
3. Click **Manual Statistics Reports**.
4. In the **Manual Statistics Reports** form, click **View** next to the report you want to see.
5. By default, the report displays all saved data.
6. To narrow your results, select a specific branch (**Centralized** only) or date range.
7. To print a copy of the report, click **Printable Version**.

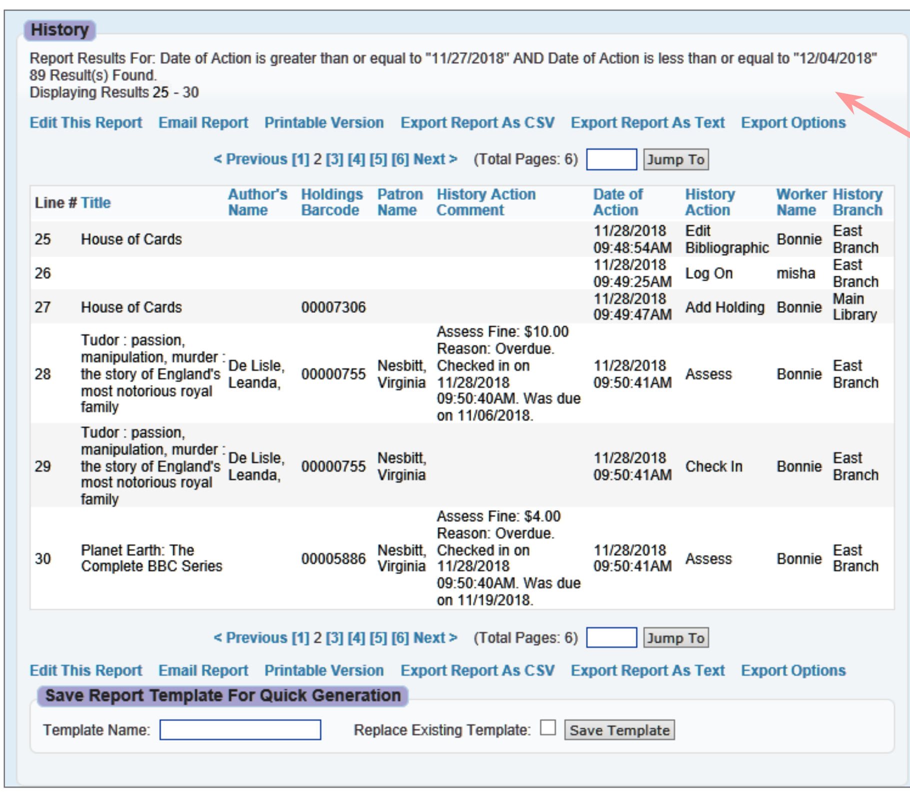


Viewing History Permissions for Workers

To further allow you to customize which workers have access to what information, the preexisting permission has been divided into four separate permissions so you can give each worker the access he/she needs.

To assign permissions

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Library**.
2. Click **Worker Records**.
3. In the **List Of Workers**, click **[Edit]** for the worker whose permissions you need to modify.
4. Scroll down to the **Supervisor Permissions** section, and click to select/deselect check boxes as needed for the history permissions described below:
    - **View History For All Workers** - workers can edit history reports and review all history in the database, including information about all workers, patrons, and items.
    - **View History For Worker Logged On** - workers can only review their own history.
    - **View Item History** - workers can access reports with complete transaction and edit history for individual item records.
    - **View Patron History** - workers can access reports with complete transaction and edit history for individual patron records.
5. Click **Save**.


History

Report Results For: Date of Action is greater than or equal to "11/27/2018" AND Date of Action is less than or equal to "12/04/2018"
89 Result(s) Found.
Displaying Results 25 - 30

Edit This Report   Email Report   Printable Version   Export Report As CSV   Export Report As Text   Export Options

< Previous [1] 2 [3] [4] [5] [6] Next > (Total Pages: 6) Jump To

Line #	Title	Author's Name	Holdings Barcode	Patron Name	History Action Comment	Date of Action	History Action	Worker Name	History Branch
25	House of Cards					11/28/2018 09:48:54AM	Edit Bibliographic	Bonnie	East Branch
26						11/28/2018 09:49:25AM	Log On	misha	East Branch
27	House of Cards		00007306			11/28/2018 09:49:47AM	Add Holding	Bonnie	Main Library
28	Tudor : passion, manipulation, murder : the story of England's most notorious royal family	De Lisle, Leanda,	00000755	Nesbitt, Virginia	Assess Fine: $10.00 Reason: Overdue. Checked in on 11/28/2018 09:50:40AM. Was due on 11/06/2018.	11/28/2018 09:50:41AM	Assess	Bonnie	East Branch
29	Tudor : passion, manipulation, murder : the story of England's most notorious royal family	De Lisle, Leanda,	00000755	Nesbitt, Virginia		11/28/2018 09:50:41AM	Check In	Bonnie	East Branch
30	Planet Earth: The Complete BBC Series		00005886	Nesbitt, Virginia	Assess Fine: $4.00 Reason: Overdue. Checked in on 11/28/2018 09:50:40AM. Was due on 11/19/2018.	11/28/2018 09:50:41AM	Assess	Bonnie	East Branch

< Previous [1] 2 [3] [4] [5] [6] Next > (Total Pages: 6) Jump To

Edit This Report   Email Report   Printable Version   Export Report As CSV   Export Report As Text   Export Options

Save Report Template For Quick Generation

Template Name: Replace Existing Template: Save Template

This image shows a **History** report for a worker with the **View History For All Workers** permission in a **Centralized** branch.

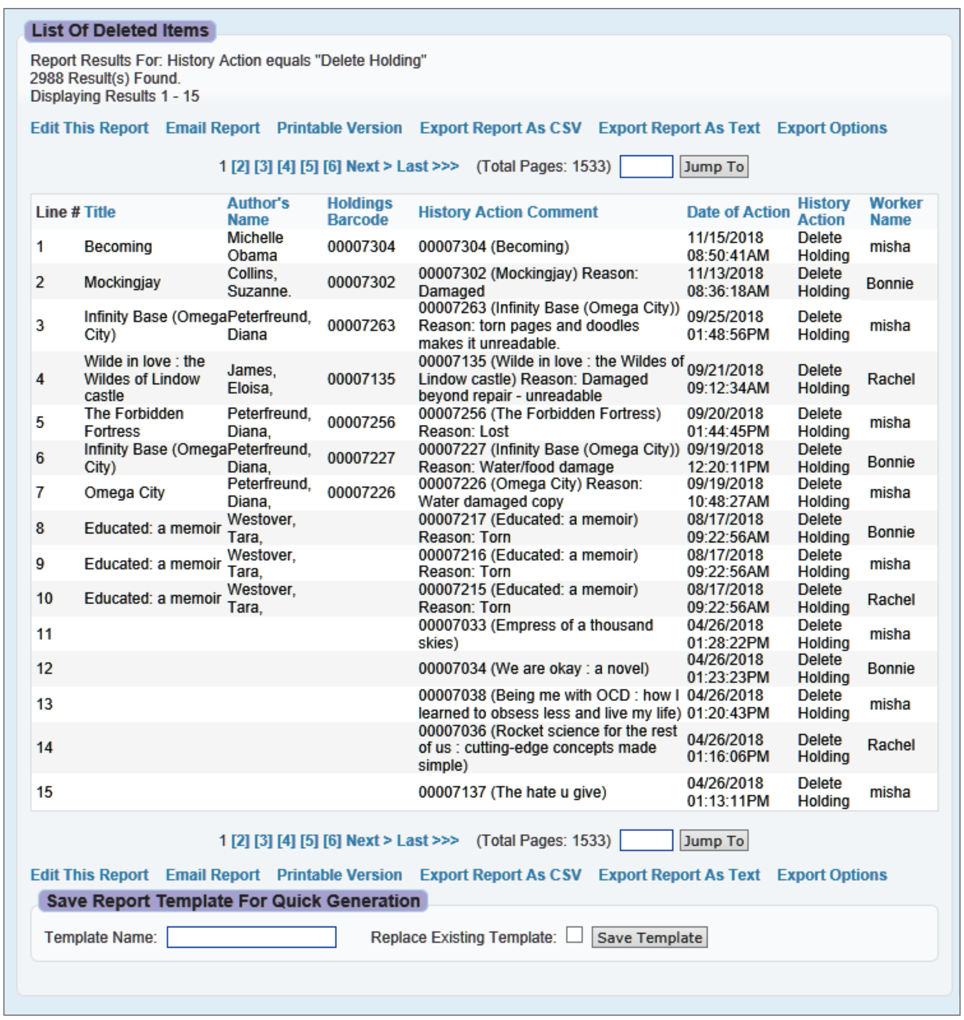
List of Deleted Items

If you need to be able to compile information about items you have removed from your database, you can use this report to view record data even after the items have been deleted.

Enhanced record data is available for items deleted *after* your upgrade. For items removed before your upgrade, the basic information is retained in the **History Action Comment.**

To run a standard List Of Deleted Items report

1. Click **Reports** from Atriuum's **Menu Bar**. Under **Administration**, click **Standard/Saved**.
2. Click **List Of Deleted Items** or **View** in the **Action** column.
3. The report opens in a new window displaying a list of deleted holdings.
4. To limit by a date range, branch (**Centralized** only), or worker, click **Edit This Report**, use the **Report Wizard** to specify your criteria, and click **Generate Report** to run the report again.


List Of Deleted Items

Report Results For: History Action equals "Delete Holding"
2988 Result(s) Found.
Displaying Results 1 - 15

Edit This Report   Email Report   Printable Version   Export Report As CSV   Export Report As Text   Export Options

1 [2] [3] [4] [5] [6] Next > Last >>>   (Total Pages: 1533)   Jump To

Line #	Title	Author's Name	Holdings Barcode	History Action Comment	Date of Action	History Action	Worker Name
1	Becoming	Michelle Obama	00007304	00007304 (Becoming)	11/15/2018 08:50:41AM	Delete Holding	misha
2	Mockingjay	Collins, Suzanne.	00007302	00007302 (Mockingjay) Reason: Damaged	11/13/2018 08:36:18AM	Delete Holding	Bonnie
3	Infinity Base (Omega City)	Peterfreund, Diana	00007263	00007263 (Infinity Base (Omega City)) Reason: torn pages and doodles makes it unreadable.	09/25/2018 01:48:56PM	Delete Holding	misha
4	Wilde in love : the Wildes of Lindow castle	James, Eloisa,	00007135	00007135 (Wilde in love : the Wildes of Lindow castle) Reason: Damaged beyond repair - unreadable	09/21/2018 09:12:34AM	Delete Holding	Rachel
5	The Forbidden Fortress	Peterfreund, Diana,	00007256	00007256 (The Forbidden Fortress) Reason: Lost	09/20/2018 01:44:45PM	Delete Holding	misha
6	Infinity Base (Omega City)	Peterfreund, Diana,	00007227	00007227 (Infinity Base (Omega City)) Reason: Water/food damage	09/19/2018 12:20:11PM	Delete Holding	Bonnie
7	Omega City	Peterfreund, Diana,	00007226	00007226 (Omega City) Reason: Water damaged copy	09/19/2018 10:48:27AM	Delete Holding	misha
8	Educated: a memoir	Westover, Tara,		00007217 (Educated: a memoir) Reason: Torn	08/17/2018 09:22:56AM	Delete Holding	Bonnie
9	Educated: a memoir	Westover, Tara,		00007216 (Educated: a memoir) Reason: Torn	08/17/2018 09:22:56AM	Delete Holding	misha
10	Educated: a memoir	Westover, Tara,		00007215 (Educated: a memoir) Reason: Torn	08/17/2018 09:22:56AM	Delete Holding	Rachel
11				00007033 (Empress of a thousand skies)	04/26/2018 01:28:22PM	Delete Holding	misha
12				00007034 (We are okay : a novel)	04/26/2018 01:23:23PM	Delete Holding	Bonnie
13				00007038 (Being me with OCD : how I learned to obsess less and live my life)	04/26/2018 01:20:43PM	Delete Holding	misha
14				00007036 (Rocket science for the rest of us : cutting-edge concepts made simple)	04/26/2018 01:16:06PM	Delete Holding	Rachel
15				00007137 (The hate u give)	04/26/2018 01:13:11PM	Delete Holding	misha

1 [2] [3] [4] [5] [6] Next > Last >>>   (Total Pages: 1533)   Jump To

Edit This Report   Email Report   Printable Version   Export Report As CSV   Export Report As Text   Export Options

Save Report Template For Quick Generation

Template Name: Replace Existing Template: Save Template

Cash Drawer Statistics

New additions to this statistical report allow you to view a breakdown of fines/fees paid to the library. Fine categories include ***Overdue***, ***Damaged***, ***Lost***, ***Missing***, ***Rental***, and ***Other***. You can also see transactions sorted by worker.

To run a Cash Drawer Statistics Report

1. Click **Reports** from Atriuum's **Menu Bar**.
2. Under **Administration**, click **Statistical Reports**.
3. Click **Cash Drawer Statistics** to run a standard report.
4. If needed, modify the date range using the calendar icons.
5. To view payments collected by a specific staff member, click the **View By:** drop-down button, and click again to select ***Worker***.
6. Click **Generate Report Using New Filter** to run the report with your modified criteria.

Cash Drawer Statistics : 07/01/2018 to 07/11/2018

Filter Criteria: Start Date: 07/01/2018
End Date: 07/11/2018 View By: Item Report Class
Generate Report Using New Filter

Total Fines Received: 2,693.32
Total Fines Refunded: -17.10
Credit Used To Pay Fines: -6.00
Credit Received: 0.90
Credit Refunded: -0.00

Cash Change Over Period: 2,671.12

Email Report Printable Version Export Report As Text

Charts: None ☐ Remove Currently Owed Column On Printable Version
Display Received Columns As: ◉ Combine Cash/Electronic ○ Separate Cash/Electronic

Cash Drawer Statistics : 07/01/2018 to 07/11/2018

Item Report Class	Received	Waived	Refunded	Overdue	Damaged	Lost	Missing	Rental	Other	Currently Owed
000 - 099	37.75	0.00	0.00	0.00	10.75	27.00	0.00	0.00	0.00	67.50
100 - 199	31.25	10.00	0.00	10.50	10.00	0.00	10.75	0.00	0.00	0.00
200 - 299	45.25	0.00	0.00	20.00	5.00	17.25	0.00	3.00	0.00	13.00
300 - 399	59.00	0.00	0.00	38.00	3.00	0.00	15.00	3.00	0.00	29.00
400 - 499	135.00	32.00	0.00	0.00	60.00	75.00	0.00	0.00	0.00	8.80
500 - 599	81.00	15.00	0.00	40.00	12.00	0.00	18.00	11.00	0.00	11.00
600 - 699	26.00	9.00	0.00	26.00	0.00	0.00	0.00	0.00	0.00	68.00
700 - 799	102.00	13.00	0.00	75.00	0.00	0.00	27.00	0.00	0.00	75.00
800 - 899	73.00	12.00	0.00	30.00	15.00	23.00	0.00	5.00	0.00	33.00
900 - 999	157.99	13.00	0.00	70.00	0.00	57.99	12.00	18.00	0.00	101.00
Audio Book	273.00	80.50	0.00	65.00	38.00	0.00	27.00	143.00	0.00	93.50
Author Set	655.00	294.00	0.00	100.00	375.00	125.00	55.00	0.00	0.00	457.00
Biography	129.00	25.00	0.00	45.00	39.00	45.00	0.00	0.00	0.00	58.00
Class Sets	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
eBooks	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Equipment	206.00	0.00	0.00	17.50	10.50	100.00	0.00	78.00	0.00	109.50
Fiction	460.98	299.50	0.00	442.00	5.00	13.98	0.00	0.00	0.00	530.75
Non-Fiction	165.60	10.00	17.10	77.50	6.50	52.10	29.50	0.00	0.00	17.50
Periodicals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Professional	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Reference	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Undefined	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Fees	55.50	14.00	0.00	55.50	0.00	0.00	0.00	0.00	0.00	70.00
Total	2,693.32	827.00	17.10	1,112.00	589.75	536.32	194.25	261.00	0.00	1,742.55

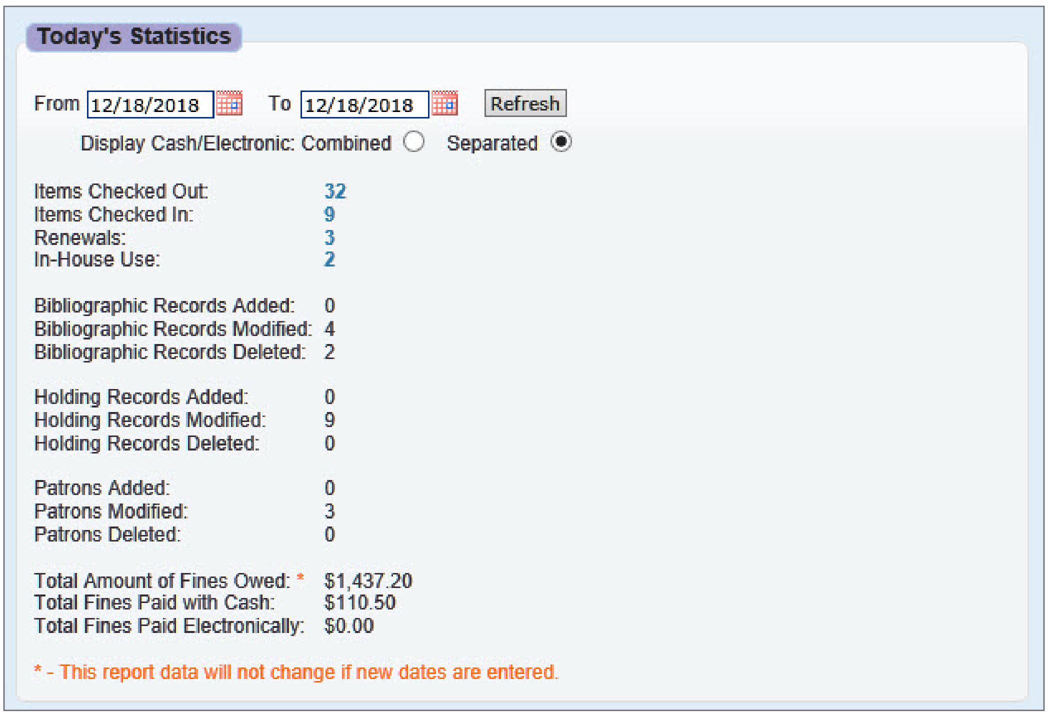
Email Report Printable Version Export Report As Text

Today’s Statistics

On the **Today’s Statistics** report, you can separate cash from electronic payments processed by the library.

To view transaction types using the Today’s Statistics report

1. Click **Reports** from Atriuum’s **Menu Bar**; under **Administration**, click **Today’s Statistics**.
2. The report opens in your Atriuum Window.
3. To view different rows for cash and electronic transactions, click the **Separated** radio button.

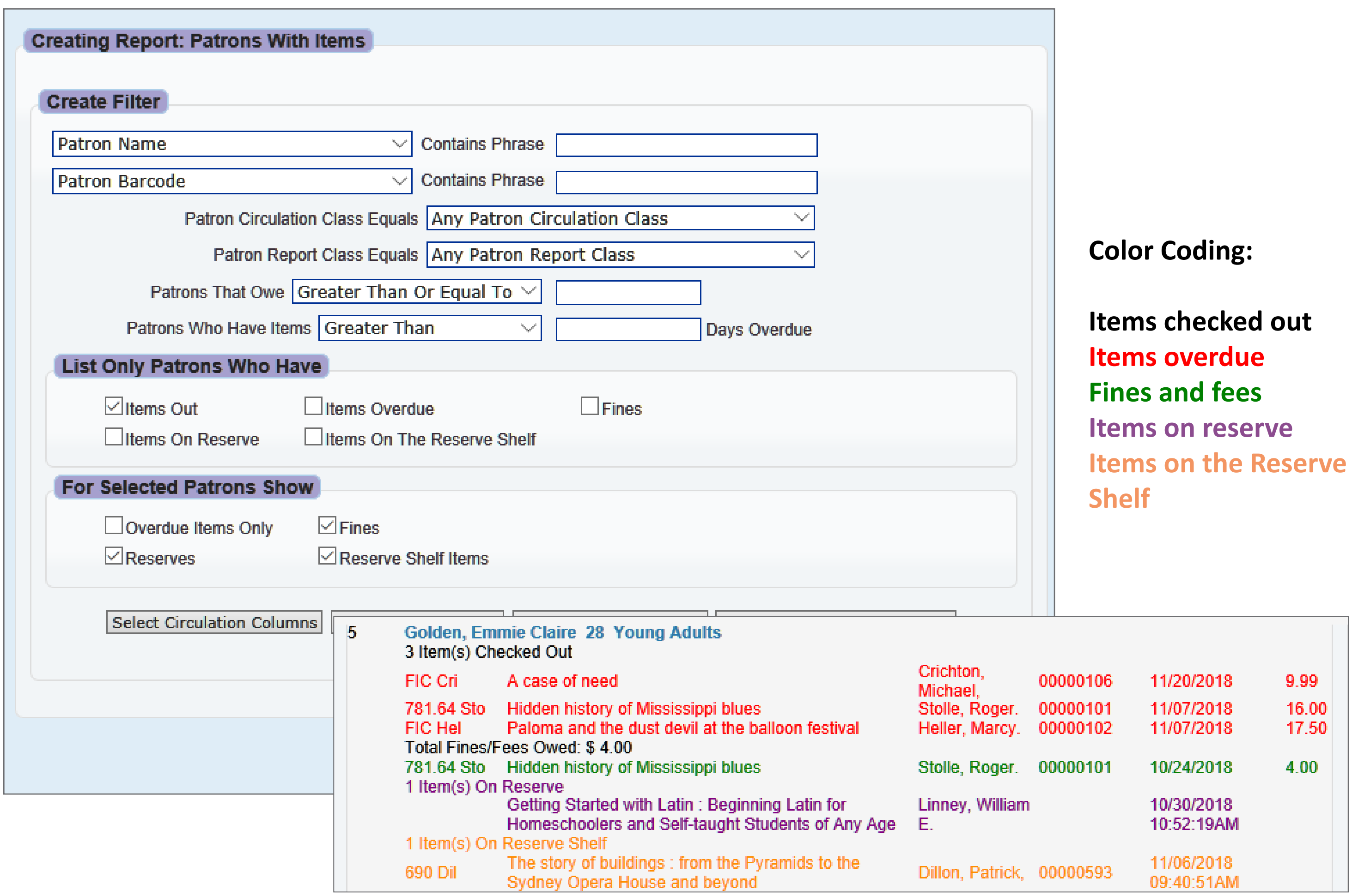


Patrons With Items Report

Check boxes have been added so you can customize the information shown in this report that combines patron and item status in a unique color-coded format.

To customize the Patrons With Items Report

1. Click **Reports** from Atriuum's **Menu Bar**; under **Patrons**, click **Patrons With Items**.
2. The report wizard opens in a new window.
3. In the **List Only Patrons Who Have** form, click checkboxes to filter your patron records. You can choose to show patrons with items out, those with fines, overdue items, and more. Each checkbox acts as an AND boolean operator, so selecting more checkboxes will limit the report to patrons who match all criteria.
4. In the **For Selected Patrons Show** form, click checkboxes to show or hide data for each patron. You can choose to limit the types of items or fines shown.
5. Click **Generate Report**. The report opens displaying color-coded results.



Color Coding:

Items checked out
Items overdue
Fines and fees
Items on reserve
Items on the Reserve Shelf

Reserves Pull List

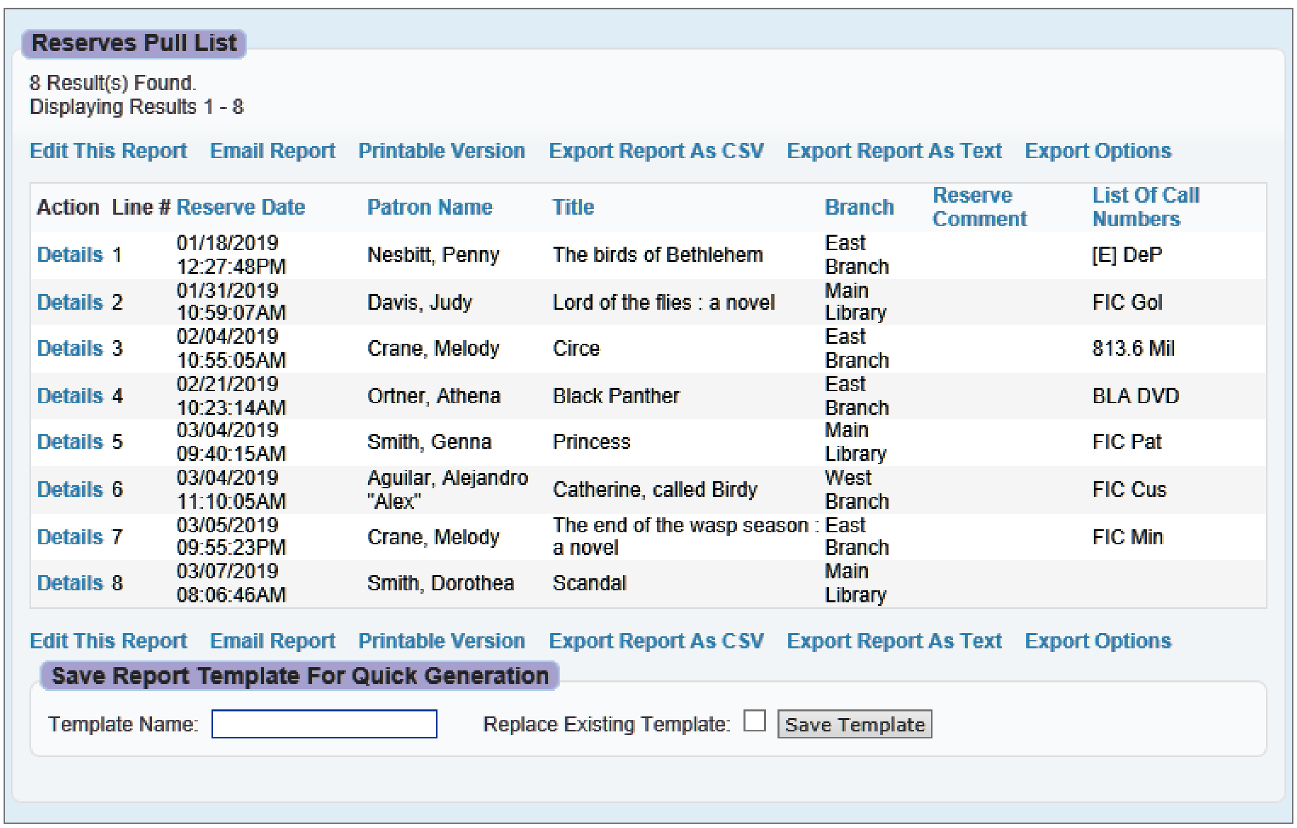
This new report shows which items need to be collected from the stacks for your library's **Reserve Shelf** or to send to other branches (**Centralized** only) to be held for their patrons.

The report data is based on the location where you are logged on. Items that have a **Custom Item Status** are excluded since those are usually not available for circulation. The **Branch** column displays the patron's preferred pickup location, i.e. where the item should be sent.

To run a standard report

1. Click **Reports** from Atriuum's **Menu Bar**.
2. Under **Patrons**, click **Pull List**. The **Report Wizard** opens in a new window.
3. Click **Generate Report**.

You can click **Printable Version** to print a hardcopy to take into the stacks. You can also schedule this report to be sent to worker email addresses or as **Action Items** (see "Action Items List" on page 30) at regular intervals using the **Schedule Reports** feature.


Reserves Pull List

8 Result(s) Found.
Displaying Results 1 - 8

Edit This Report Email Report Printable Version Export Report As CSV Export Report As Text Export Options

Action	Line #	Reserve Date	Patron Name	Title	Branch	Reserve Comment	List Of Call Numbers
Details	1	01/18/2019 12:27:48PM	Nesbitt, Penny	The birds of Bethlehem	East Branch		[E] DeP
Details	2	01/31/2019 10:59:07AM	Davis, Judy	Lord of the flies : a novel	Main Library		FIC Gol
Details	3	02/04/2019 10:55:05AM	Crane, Melody	Circe	East Branch		813.6 Mil
Details	4	02/21/2019 10:23:14AM	Ortner, Athena	Black Panther	East Branch		BLA DVD
Details	5	03/04/2019 09:40:15AM	Smith, Genna	Princess	Main Library		FIC Pat
Details	6	03/04/2019 11:10:05AM	Aguilar, Alejandro "Alex"	Catherine, called Birdy	West Branch		FIC Cus
Details	7	03/05/2019 09:55:23PM	Crane, Melody	The end of the wasp season : a novel	East Branch		FIC Min
Details	8	03/07/2019 08:06:46AM	Smith, Dorothea	Scandal	Main Library		

Edit This Report Email Report Printable Version Export Report As CSV Export Report As Text Export Options

Save Report Template For Quick Generation

Template Name: Replace Existing Template: Save Template

Phone Call Requests Report

If patrons prefer to be notified by phone of reserve status, you can run a report to know who needs a call from staff. You must enable the related *circulation setting* for phone call requests to be queued. Notifications are also added to the **Patron Information** form (see "Phone Call Notifications" on page 29) as well as during circulation (**Circulation Menu** and **Circulation Desk**).

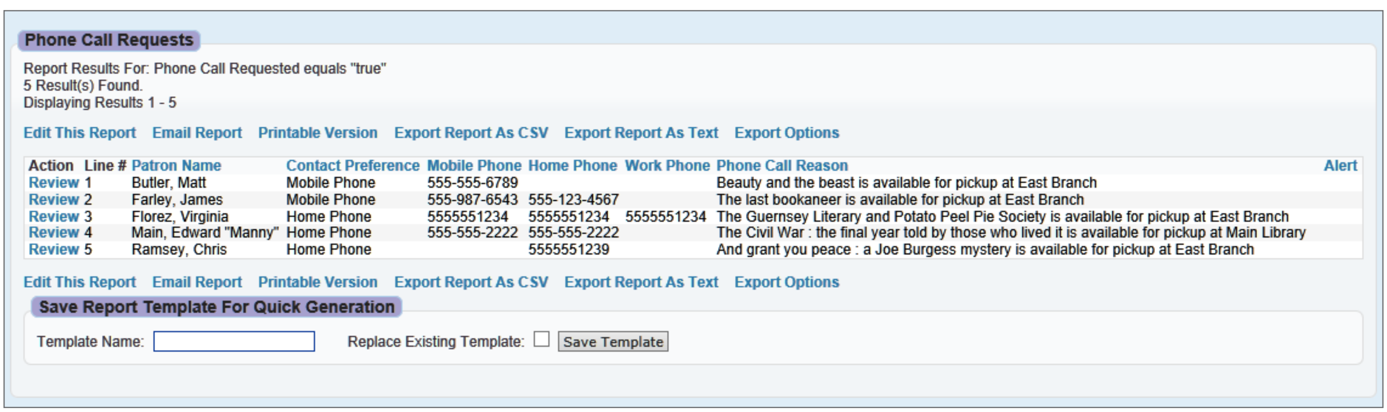
To enable the setting

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:** (first section of settings), click **Yes**.
4. Click **Save** to keep your changes.

The new **Phone Call Requests** report allows to you to quickly see all the patrons who need to be notified by phone about their reservations or cancellations. Patrons and contact information display in this list if the patron's contact preference is set to a phone number (Home, Work, or Mobile) and an item they have reserved is available for pickup or a reservation was cancelled because it could not be fulfilled.

To run a standard report

1. Click **Reports** from Atriuum's **Menu Bar**.
2. Under **Administration**, click **Standard/Saved**.
3. Click **Phone Call Requests**.


Phone Call Requests

Report Results For: Phone Call Requested equals "true"
5 Result(s) Found.
Displaying Results 1 - 5

Edit This Report Email Report Printable Version Export Report As CSV Export Report As Text Export Options

Action	Line #	Patron Name	Contact Preference	Mobile Phone	Home Phone	Work Phone	Phone Call Reason	Alert
Review	1	Butler, Matt	Mobile Phone	555-555-6789			Beauty and the beast is available for pickup at East Branch	
Review	2	Farley, James	Mobile Phone	555-987-6543	555-123-4567		The last bookaneer is available for pickup at East Branch	
Review	3	Florez, Virginia	Home Phone	5555551234	5555551234	5555551234	The Guernsey Literary and Potato Peel Pie Society is available for pickup at East Branch	
Review	4	Main, Edward "Manny"	Home Phone	555-555-2222	555-555-2222		The Civil War : the final year told by those who lived it is available for pickup at Main Library	
Review	5	Ramsey, Chris	Home Phone		5555551239		And grant you peace : a Joe Burgess mystery is available for pickup at East Branch	

Edit This Report Email Report Printable Version Export Report As CSV Export Report As Text Export Options

Save Report Template For Quick Generation

Template Name: Replace Existing Template: Save Template

You can schedule this report to be sent to worker email addresses or **Action Items** (see "Action Items List" on page 30) at regular intervals using the **Schedule Reports** feature.

As you or your staff call patrons, click **Review** next to the patron you have contacted to open the **Patron Information** form. Click **Mark Contacted/Clear All** to indicate that the patron was successfully reached so that he/she will be removed from the report.

Reserve Shelf Reports Options

New columns are available on **Reserve Shelf** reports to help you manage your items on hold. A new default column called **Expired** lets you can see at a glance which items need to be returned to the main stacks or assigned to the next patron in line. You can also add a column to show the **Reserve Shelf Timeout** for the item (based on its **Item Circulation Class**) to see when the reservation expires. Use these fields to customize and schedule a report that can be sent as an email or **Action Item** so your Reserve Shelf stays up-to-date.

To customize the List On Reserve Shelf report

1. Click **Reports** from Atriuum's **Menu Bar**; under **Administration**, click **Standard/Saved**.
2. Click **List On Reserve Shelf**.
3. Click **Edit This Report**.
4. If your library is **Centralized**, click the **Branch Equals** drop-down list, and click again to select your location.
5. Click **Columns** in the **Report Wizard** menu bar.
6. Scroll down the list of **Possible Columns**, and double-click **Reserve Shelf Timeout** to add it to the list of **Selected Columns**.
7. Click **Generate Report**.
8. The report lists all the items on your reserve shelf. Expired reservations are listed first so they can easily be identified and removed from the shelf or assigned to the next patron.

Reserve Shelf Items

11 Result(s) Found.
Displaying Results 1 - 10

Edit This Report Email Report Printable Version Export Report As CSV Export Report As Text Export Options

1 [2] Next >

Line #	Reserve Shelf Date	Patron Name	Title	Reserve Shelf Comment	Expired	Reserve Shelf Timeout
1	06/29/2018 09:04:54AM	North, Nellie	American housewife : Stories	Restored Reserves	true	7
2	07/10/2018 02:11:56PM	North, Nellie	Maze runner trilogy		true	7
3	10/26/2018 09:13:49AM	Smith, Janice	The fallen		true	7
4	11/02/2018 09:18:58AM	Aguilar, Alejandro "Alex"	A Fable	Reserved from OPAC by patron Aguilar, Alejandro "Alex" (401769)	true	7
5	11/05/2018 01:37:25PM	White, Linda	Fahrenheit 451		true	7
6	11/06/2018 09:40:51AM	Golden, Emmie Claire	The story of buildings : from the Pyramids to the Sydney Opera House and beyond	Reserved from OPAC by patron Golden, Emmie Claire (28)	true	7
7	12/17/2018 11:02:09AM	Jones, Hollie	Pecan pies and homicides		false	7
8	12/18/2018 11:29:12AM	Rowe, Michael "Greggory"	Water for elephants	Need this for my wife Reserved from OPAC by patron Rowe, Michael "Greggory" (530)	false	7
9	12/27/2018 12:56:27PM	Schrader, Ryan	Island of Silence	Reserved from OPAC by patron Schrader, Ryan (803000)	false	7
10	12/28/2018 07:50:39AM	Schrader, Robin	Beyond the dinosaurs : monsters of the air and sea	Reserved from OPAC by patron Schrader, Robin (795000)	false	7

1 [2] Next >

Edit This Report Email Report Printable Version Export Report As CSV Export Report As Text Export Options

Save Report Template For Quick Generation

Template Name: Replace Existing Template: Save Template

OPAC

RBdigital Integration

RBdigital, formerly OneClickdigital, is an online repository of audiobooks and eBooks that can be integrated with your **OPAC**. If your library subscribes to this service, you can see an RBdigital tab in **OPAC** search results, allowing your patrons to locate digital items alongside your regular catalog items. If the registration email address for the patron's RBdigital account matches the saved email address in his/her patron record in Atriuum, the patron can see items they have checked out and reserved in **My Items** (based on settings).

To enable RBdigital

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **OPAC**.
2. Click **Add Ons**.
3. In the *Digital Resources* section, locate the RBdigital settings.
4. To show patrons' checked out and reserved items in **My Items**, click **Yes** next to **Enable In My Items**.
5. To show the RBdigital tab in search results, click **Yes** next to **Enable In Searching**.
6. Enter the **Library ID** provided to you by RBdigital.
7. Enter the **Library URL** provided to you by RBdigital.
8. Click **Save**.

Search results from your RBdigital collection display in a unique tab in **OPAC** search results. Patrons can click a link or icon to open the item record at RBdigital.

List View

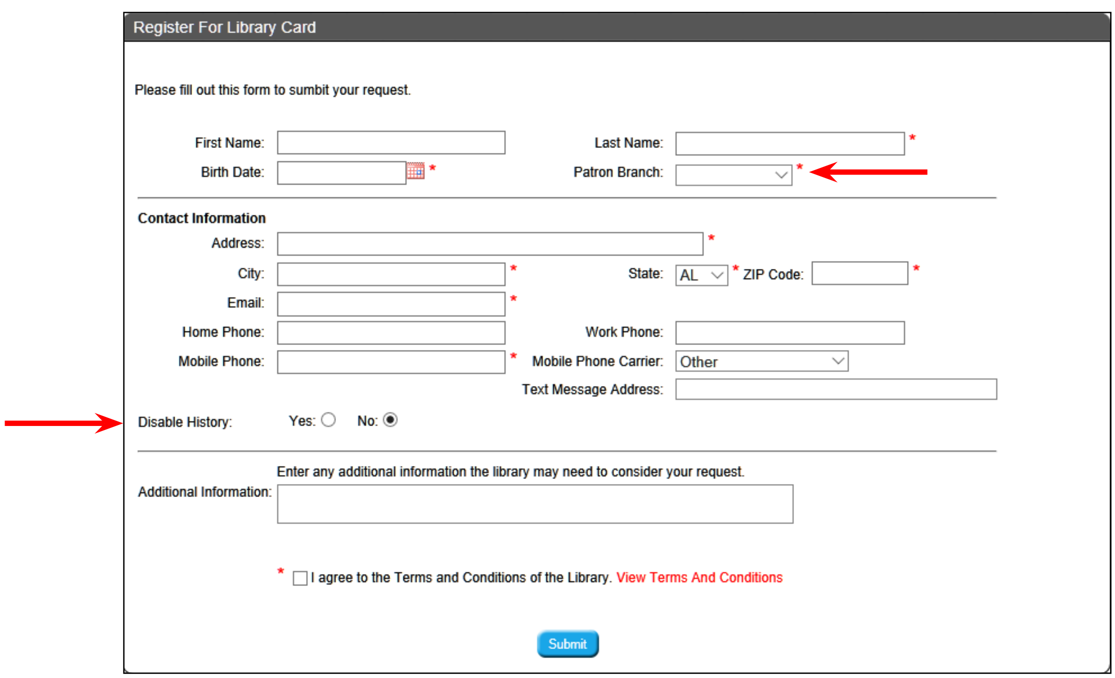
Grid View

Card Registration Options

During library card registration through **OPAC**, patrons can specify what their preferred branch is and whether or not they want their circulation history collected. Branch displays by default but is not required unless you make it mandatory using the **Online Registration Settings** form. The history option only displays if you enable this option using the same form.

To establish Online Registration Settings

1. Click **Administration** from Atriuum’s **Menu Bar**, and then click **OPAC**.
2. Click **General And Patron Account Settings**.
3. Under *My Items Settings*, next to **Allow Patrons To Register For Library Card Online:**, click **Edit Settings**.
4. If needed, click **Yes** to allow patrons to register online.
5. If needed, use the check boxes to select which registration fields are mandatory, including **Patron Branch**.
6. Next to **Show Disable History At Registration:** click **Yes** to allow patrons to choose whether or not to hide their circulation history during the registration process.
7. Make sure an email address is included so a librarian receives notifications for new card requests.
8. Click **Save**. If you need to modify any registration messages or terms and conditions, use the **links** to modify your preferences.
9. When the new patron fills out the **Register For Library Card** form in **OPAC**, he/she will see the option to hide his/her circulation history and select a branch.



Show Number of People in Line for Reserves

If patrons want to reserve a popular title, they may like to see how many people are in line ahead of them before finalizing the reservation. The existing setting **Show Number Of Prior Patron Reservations:** lets patrons see their placement on the **Reserves** tab of **My Items**. The same setting now applies to the **Reserve Item** pop-up so that patrons can see where they will be in line *before* reserving the item.

If you use Reserve Priority or manually rearrange reserve ordering for VIP patrons, you may not want to enable this setting so that patrons do not see their place in line change.

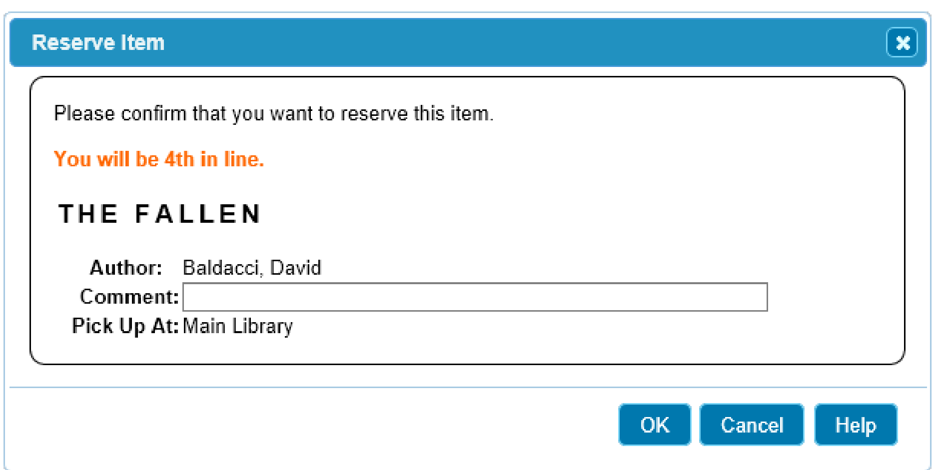
To display patron reserve position

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **OPAC**.
2. Click **General And Patron Account Settings**.
3. Under *Reserve Settings*, click **Yes** next to **Show Number Of Prior Patron Reservations**.
4. Click **Save**.

To view reservation placement in OPAC

These reservation steps may vary depending on your reserve settings. Below is an example. This option does not work with **Quick Reserve**.

1. Search for an item, and click the item title in your search results to open **Full Details**.
2. Click the **Reserve** button or **Holdings** tab.
3. Click **Reserve**.
4. If you are not logged on to **My Items**, you are prompted to do so before continuing.
5. The **Reserve Item** pop-up displays with a **message** showing your potential place in line.
6. To continue and confirm the reservation, click **OK**; otherwise, click **Cancel**.



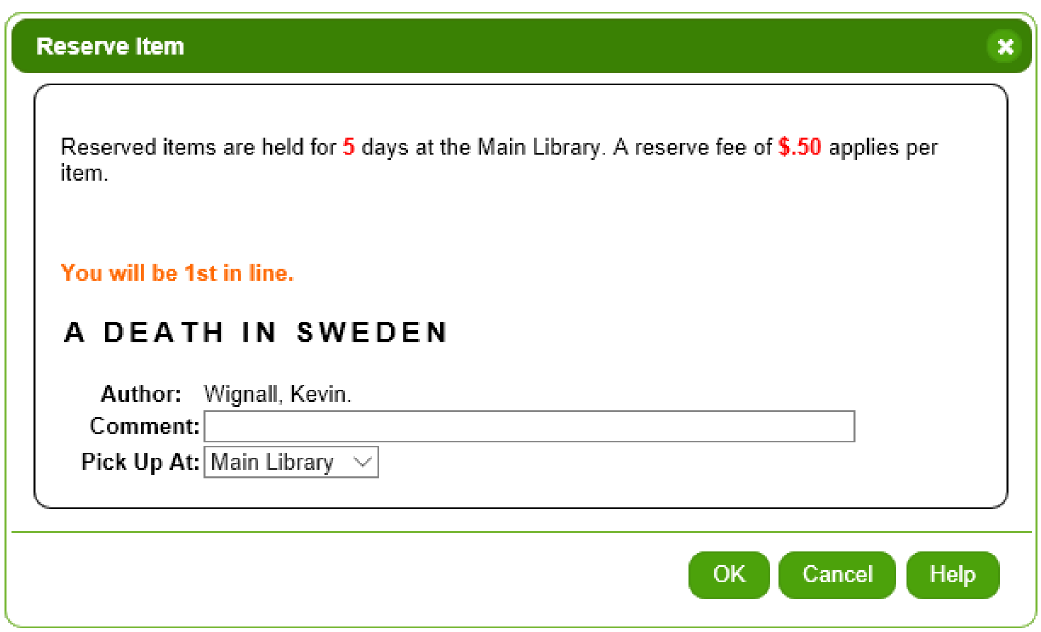
Custom Reserve Message

If you need patrons to be aware of specific library policies when reserving items through **OPAC**, you can customize the message that displays on the **Reserve Item** pop-up to include this information (does not apply to **Quick Reserve**).

To customize the reserve message

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **OPAC**.
2. Click **Messages And Information**.
3. Click **Edit Custom Reserve Message**.
4. The default message displays. Delete this and enter your own statement in the field. This might include policies such as how long items are held, fees that apply, and more.
5. Format content using the text editor buttons.
6. At any time, click **Clear** to empty the field and start over, or click **Restore** to return to the previous message content.
7. Click **Save**.

This message displays when patrons reserve items through **OPAC**. Other fields and information on the pop-up may vary depending on your settings.



Custom Item Status and Reserves

Often, custom item status indicates an item is not available to check out, such as items that are ***Missing***, ***In Repair***, etc. Items with these statuses can be hidden from **OPAC**. If holdings are hidden, patrons cannot reserve them through **OPAC**. They can be reserved by librarians with an override.

To make a custom item status hidden from OPAC and prevent reserves

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Circulation**.
2. Click **Custom Item Status**.
3. Click **Edit** in the **Action** column for the status you need to modify.
4. Next to **Include In OPAC:**, click **No**.
5. Click **Save**.
6. Any holdings with this status will not display in **OPAC** or be available for reserve.

Edit Custom Item Status

Name: In Repair
Description: Items have been sent for repair
Include In OPAC: ◯ Yes ◉ No

Save Cancel

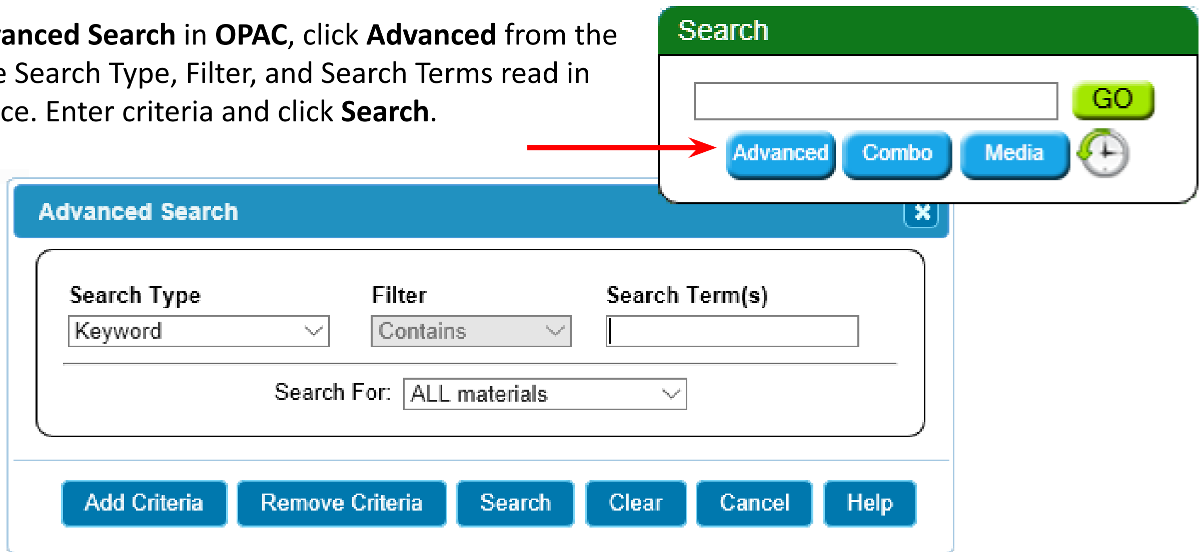
Add/Edit Custom Item Status

Name	Description	Include In OPAC	Action
Use Circulation Status	Status automatically specified based on circulation	Yes	None
At Bindery	The item is being re-bound	Yes	Edit | Delete
Claims Returned	The last patron to borrow this item claims it has been returned, but Atriuum has no record of it being checked in	Yes	Edit | Delete
Damaged	This item is damaged	Yes	Edit | Delete
FOL Sale	Books designated for patron sale	Yes	Edit | Delete
In Library Use Only	Items that can only be used in the library	Yes	Edit | Delete
In Repair	Items have been sent for repair	Yes	Edit | Delete
In Transit	This item is in transit	Yes	Edit | Delete
Lost and Paid For	This item has been lost and is paid for	Yes	Edit | Delete
Missing	This item is missing but it is not yet considered lost	No	Edit | Delete
New Movies for Rent Display	New movies are rented out for one dollar	Yes	Edit | Delete
On Display	This item is on display	Yes	Edit | Delete

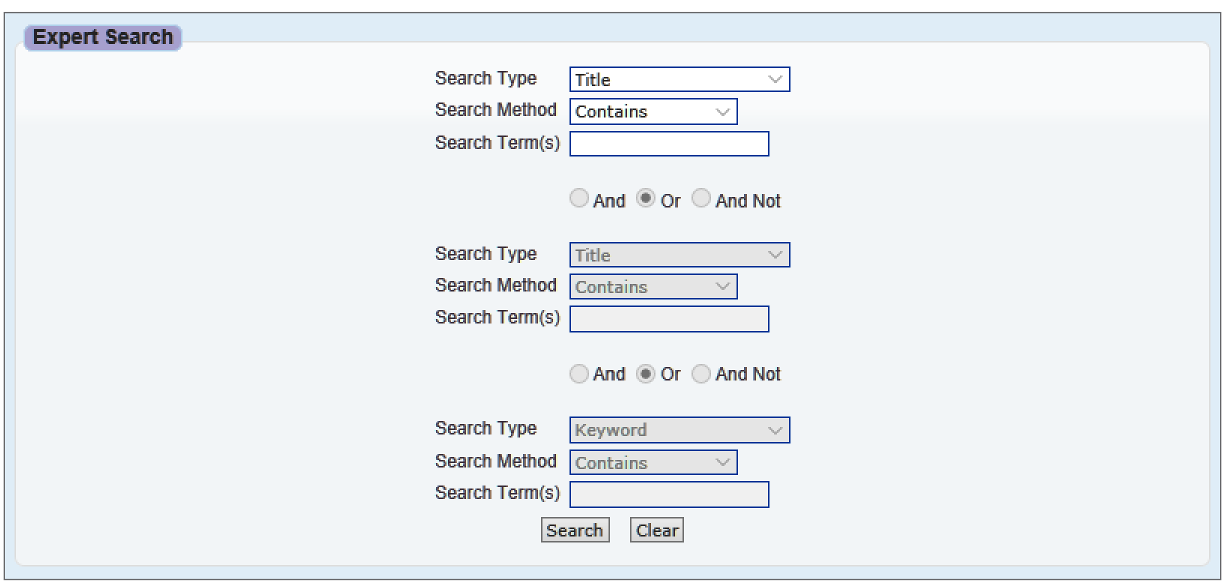
Advanced/Expert Search Filter

The **Advanced Search** option in **OPAC** and **Expert Search** option in Atriuum have been rearranged to be more user-friendly.

To perform an **Advanced Search** in **OPAC**, click **Advanced** from the **Search** widget. The Search Type, Filter, and Search Terms read in order like a sentence. Enter criteria and click **Search**.



To perform an **Expert Search** in Atriuum, click **Search** from Atriuum’s **Menu Bar**, and then click **Expert**. The Search Type, Search Method, and Search Terms read in order like a sentence. Enter criteria and click **Search**.



Electronic Search Results Reminder

When patrons perform a search in **OPAC**, a new message at the bottom of the **Catalog** tab reminds them to check results for enabled electronic services.

This new feature requires no additional setup. If you want to rename your **OverDrive** tab, use the steps below.

To rename the OverDrive tab

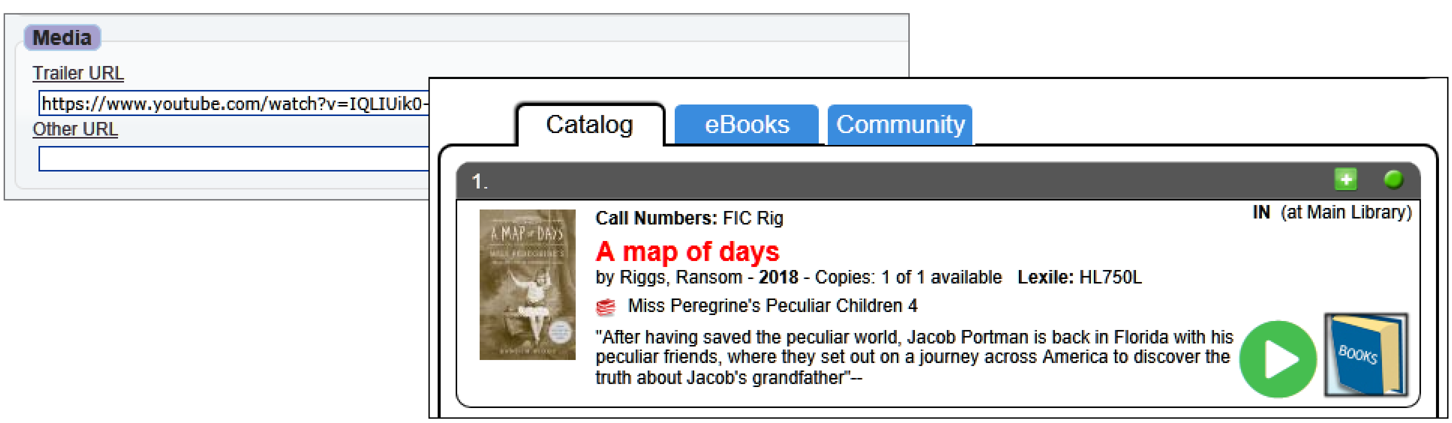
1. Click **Administration** from Atriuum’s **Menu Bar**, and then click **OPAC**.
2. Click Add Ons. The **Add On Settings** form displays.
3. In the **Digital Resources** form, click Setup OverDrive. The **OverDrive Setup** form displays.
4. In the **Default OPAC Label:** field, enter a new name for the tab in **OPAC**.
5. Click **Save**.
6. Preview your selection in **OPAC** to ensure it displays properly.

Trailers in OPAC

To entice readers to try a new item, you can add a link to its trailer; an icon displays in **OPAC** search results (**List View**), and a link displays in the item’s **Full Details**.

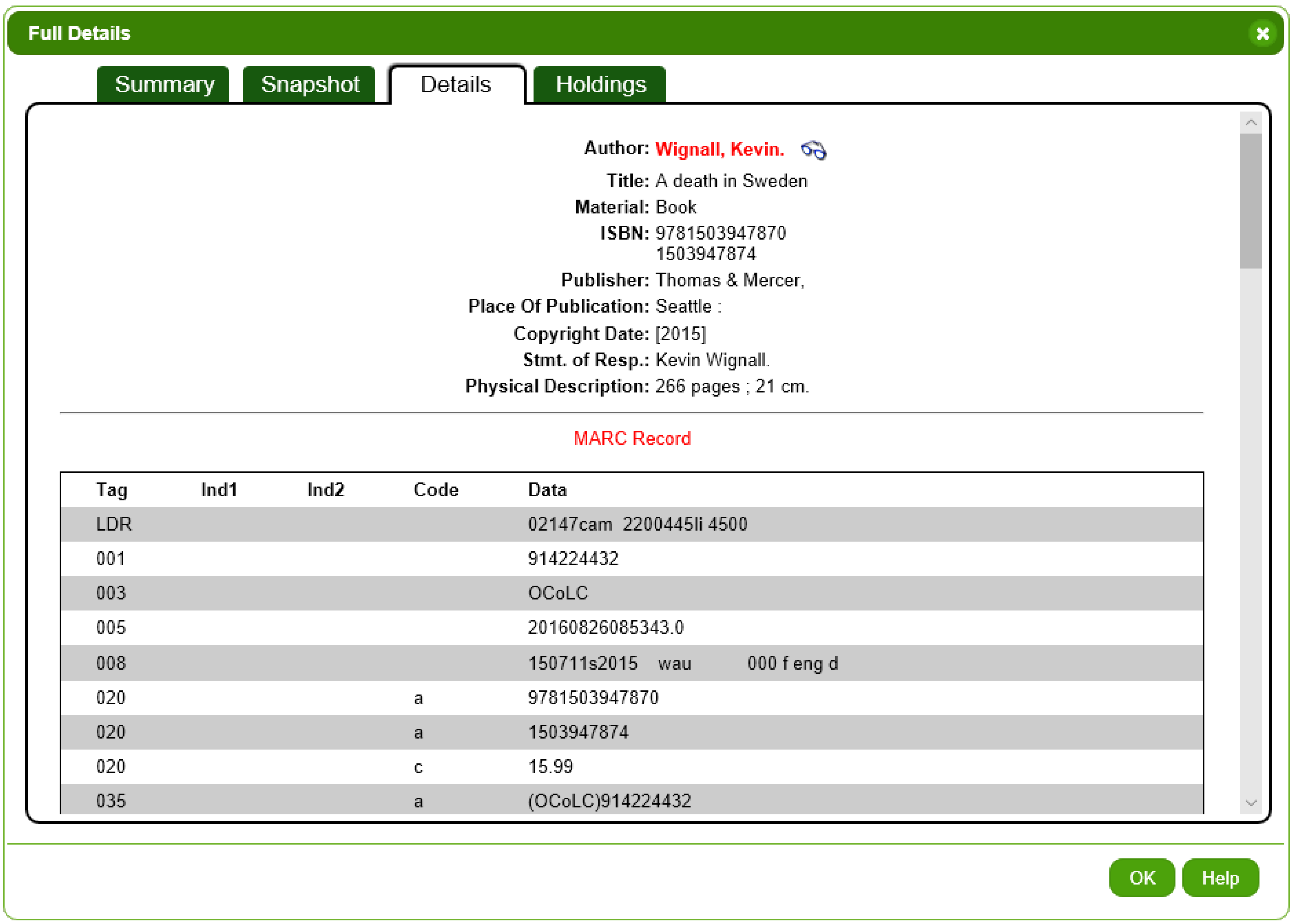
To add a trailer URL

1. Click **Catalog** from Atriuum’s **Menu Bar**. Under **Item**, click **Edit**.
2. Search for the record you need to modify. The **Edit Item: Bibliographic Record** form displays.
3. In the **Media** form, enter the address in the **Trailer URL** field.
4. Click **Save**.



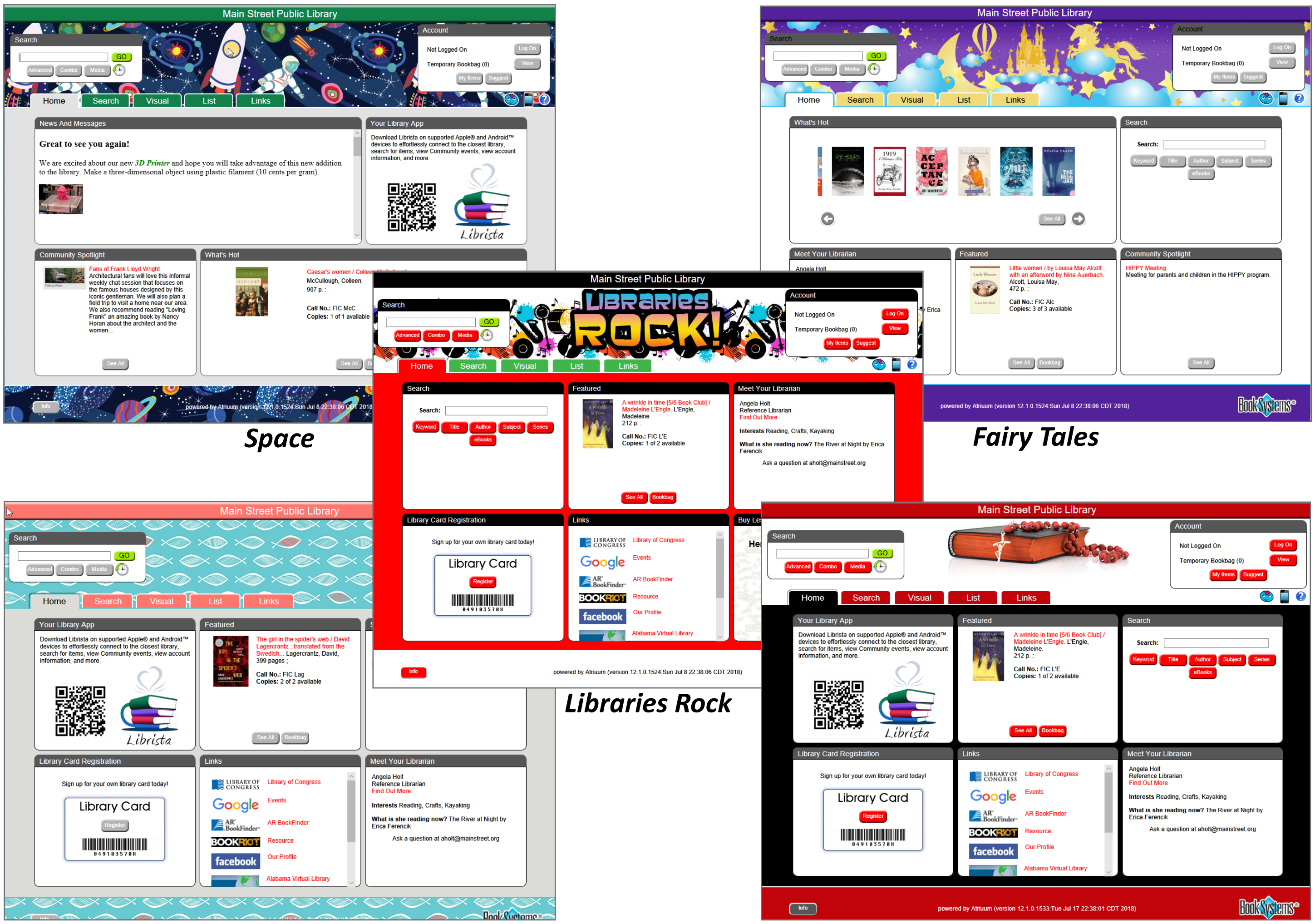
MARC Display in OPAC

If you need to view MARC data for an item you have located in **OPAC**, you can now view that information from the **Details** tab in **Full Details**. Simply click the **MARC Record** link to show or hide this data. If you have enabled the **Combine Summary And Details Tabs:** setting (**General And Patron Account Settings** form), this option displays with other details on the **Summary** tab.



New OPAC Themes

More **Main** themes have been added for use in your library's public catalog. Options include holiday themes like Stars And Stripes, Christmas Ornaments, Roses, and Easter Eggs. There are also subject-based themes for Space, Fairy Tales, and more. A library celebration theme--Libraries Rock--allows you to celebrate the awesome service your library provides to your community. An entire new category of Faith-Based themes contains options for religious organizations and schools.



Space *Fairy Tales* *Libraries Rock* *Ichthus* *Rosary*

To change your Library's Main OPAC Theme

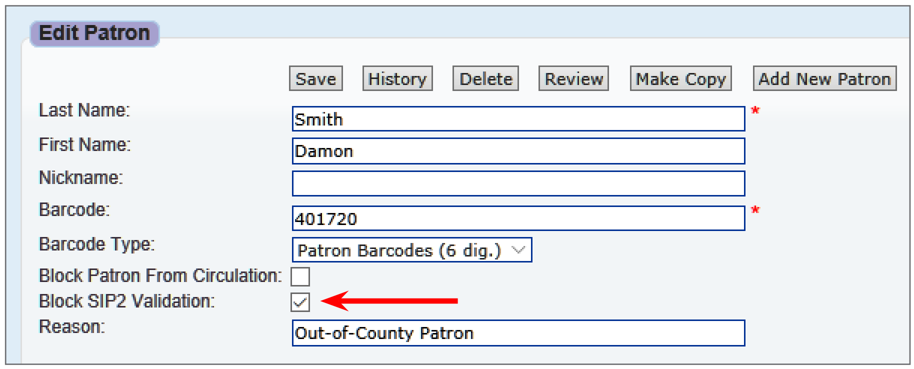
1. Click **Administration** from Atriuum's **Menu Bar**, and then click **OPAC**.
2. Click Themes And Layouts.
3. Under *Default OPAC Theme Settings For Library*, click the drop-down button next to **Default Main Theme:**, and click again to make a selection. (To see thumbnails of all available options, click **Browse...**)
4. Click **Save** to keep your changes.

Block SIP2 (Online Resource Access) for Patrons or Classes

You may choose to allow patrons to check out physical items but restrict their use of online resources. For example, you might allow out-of-county residents to check out books if they pay a fee for a library card. You can block these patrons from using online services that use SIP2 authentication either on individual patron records or by **Patron Circulation Class**. Some services that use SIP2 authentication for patrons include MackinVia, CASSIE, Bibliotheca, Cybrarian, and more.

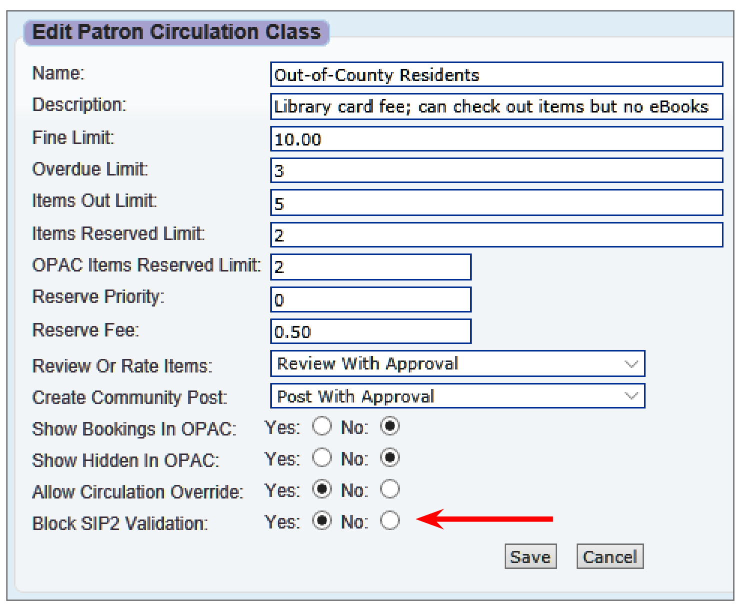
To block an individual patron from using SIP2 resources

1. Click **Patrons** from Atriuum's **Menu Bar**. Under **Patron**, click **Edit**.
2. Search for the patron you need to find. The **Edit Patron** form displays.
3. Click to select the **Block SIP2 Validation:** check box.
4. Click **Save**.



To block a Patron Circulation Class from using SIP2 resources

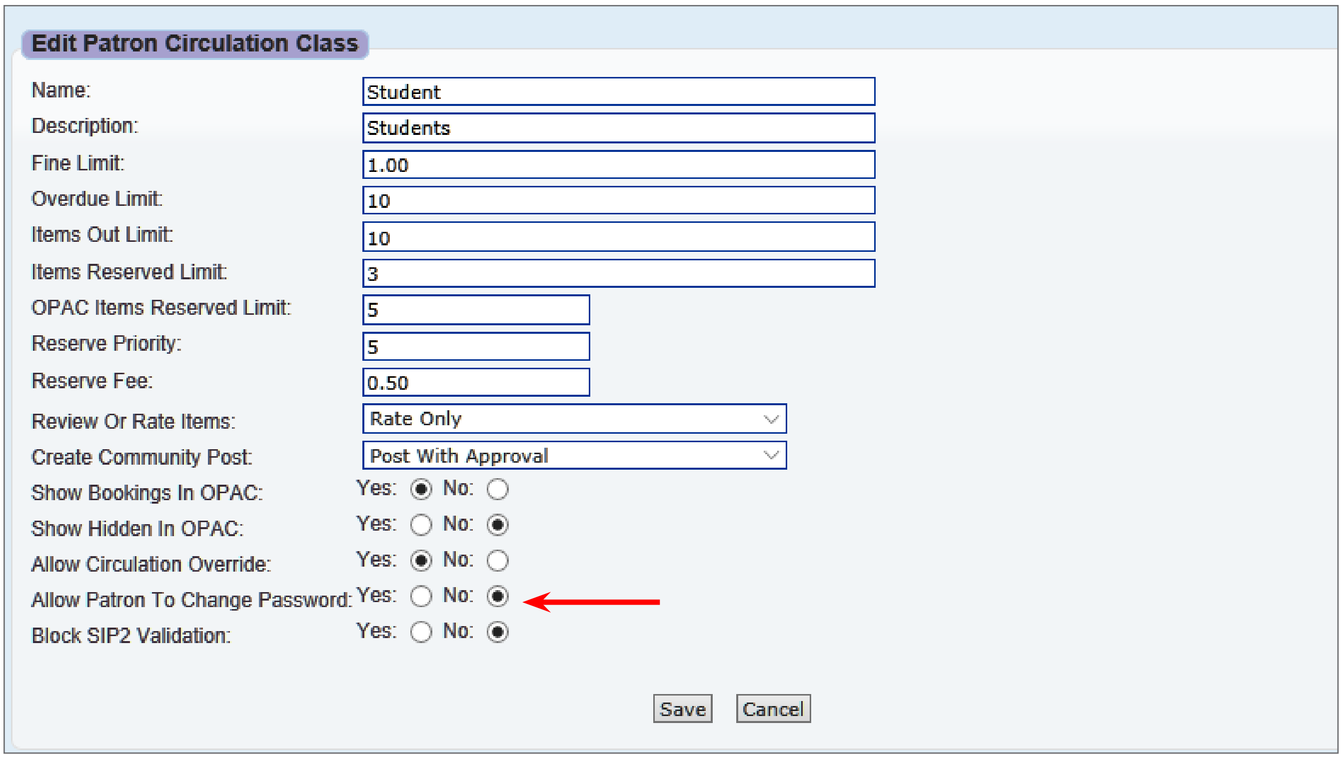
1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Patrons**.
2. Click **Patron Circulation Class**.
3. Click **Edit** in the **Actions:** list next to the class you need to modify.
4. Next to **Block SIP2 Validation:**, click **Yes**.
5. Click **Save**.



Allow Patrons to Change Password in OPAC by Circulation Class

You may allow some patrons to change their own passwords in **OPAC** but not others. For example, you might want teachers to be able to change their own passwords but not students. You can edit **Patron Circulation Classes** to allow or block groups of patrons from changing their own passwords.

To see this option, you must enable the **Allow Patrons To Change Their Password:** setting under *My Items Settings* on the **General And Patron Account Settings** form. Then you can disable the option for any necessary circulation classes.



To allow or restrict patron classes from changing passwords

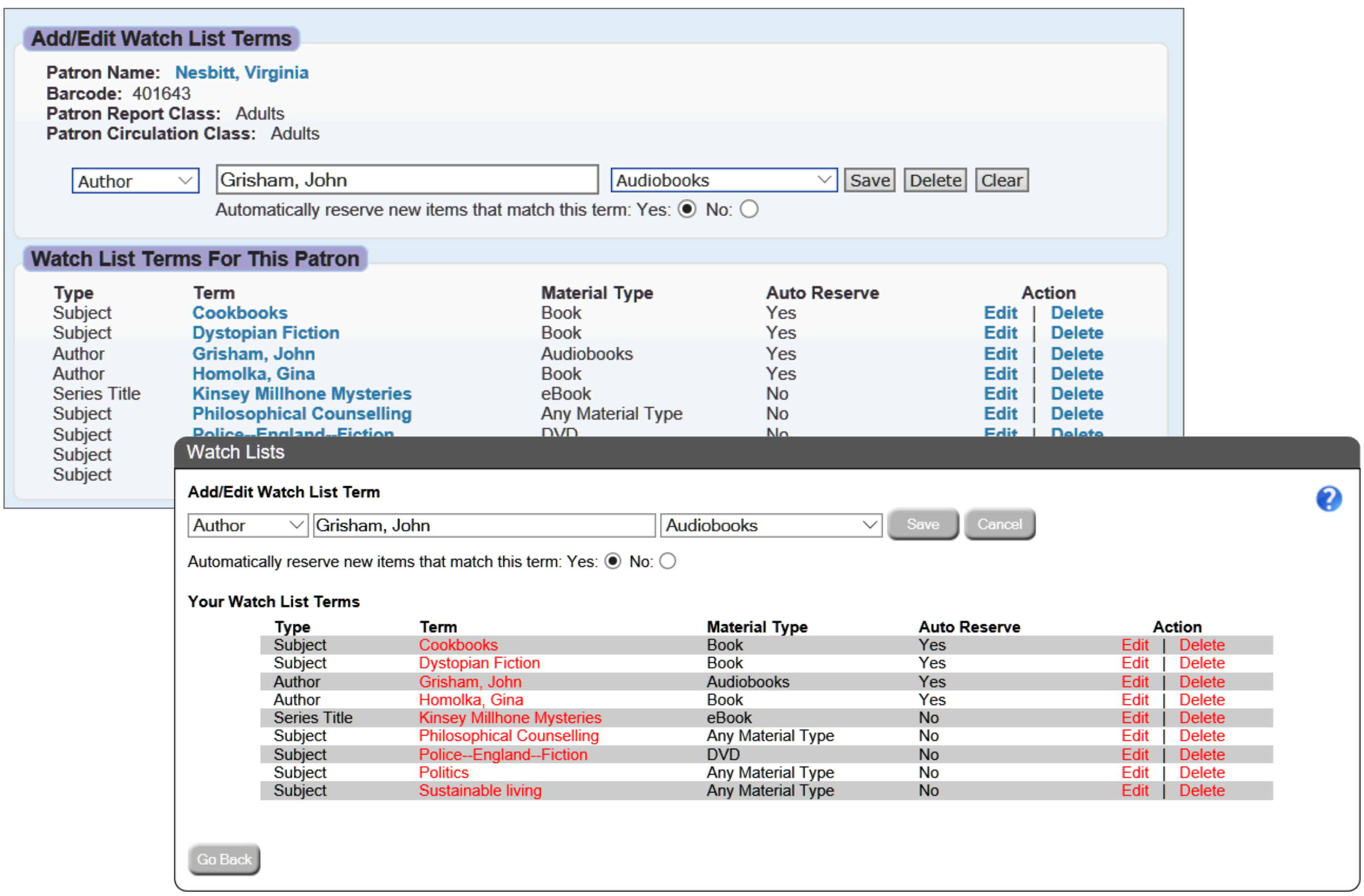
1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Patrons**.
2. Click **Patron Circulation Class**.
3. Click **Edit** in the **Actions:** list for the class you want to modify.
4. Next to **Allow Patron To Change Password:**, click **Yes** to permit this option; otherwise, click **No** to disable this option.
5. Click **Save**.

Watch Lists by Material Type

Patrons can now specify a preferred material type for each watch list term they have set up for favorite authors, series, or subjects. For instance, they might want the latest John Grisham book, but only the audiobook format. Patrons can edit this information through **My Items** in **OPAC**. Librarians can also edit this information in Atriuum.

To edit a watch list term in Atriuum

1. Click **Patrons** from Atriuum's **Menu Bar**. Under **Patron**, click **Review**.
2. Search for the patron whose terms you need to modify.
3. The **Patron Information** form displays. Click **Watch List Terms For This Patron**.
4. Click **Edit** in the **Action** column for the term you need to modify.
5. By default, preexisting terms are for ***Any Material Type***. To limit this term, click the second drop-down list, and click again to select a specific type.
6. Click **Save**.
7. Patrons will be notified via email or text when watch list terms are matched (based on settings).

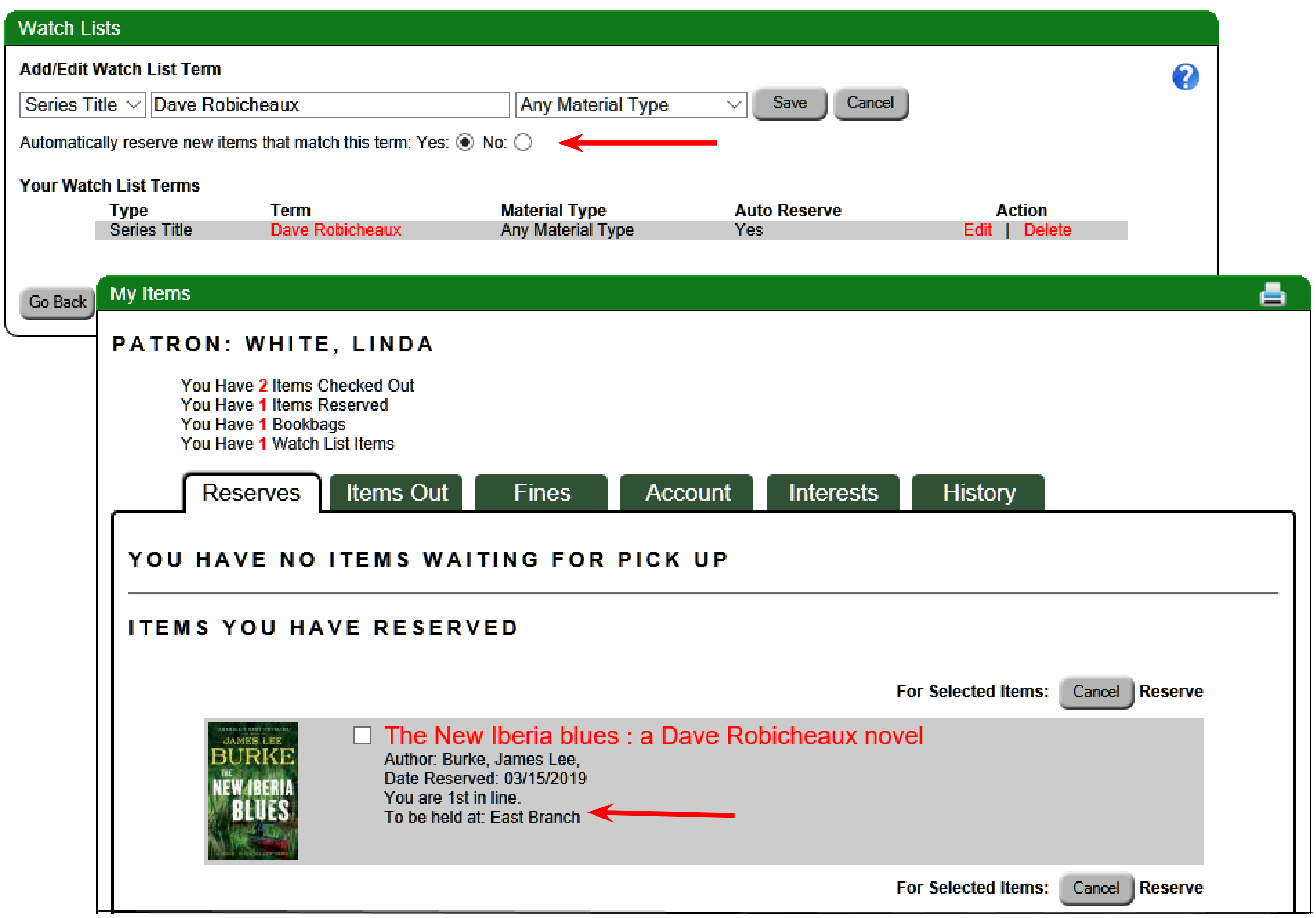


Watch Lists Pickup Locations (Centralized only)

In a Centralized library system, a pickup location is assigned to automatic reserves of **Watch List** items. The patron's preferred branch will automatically be designated as the pickup location when the reserve is generated through background tasks.

To enable auto-reservations of Watch List terms

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **OPAC**.
2. Click **General And Patron Account Settings**.
3. Under *Reserve Settings*, next to **Allow Patrons To Auto Reserve Watch List Items:**, click **Yes**.
4. Click **Save**.
5. Patrons can designate whether to auto-reserve items for specific terms using **My Items**. Auto-reserved items will be held at the branch specified on the patron record. Staff can also edit patron preferences in Atriuum.



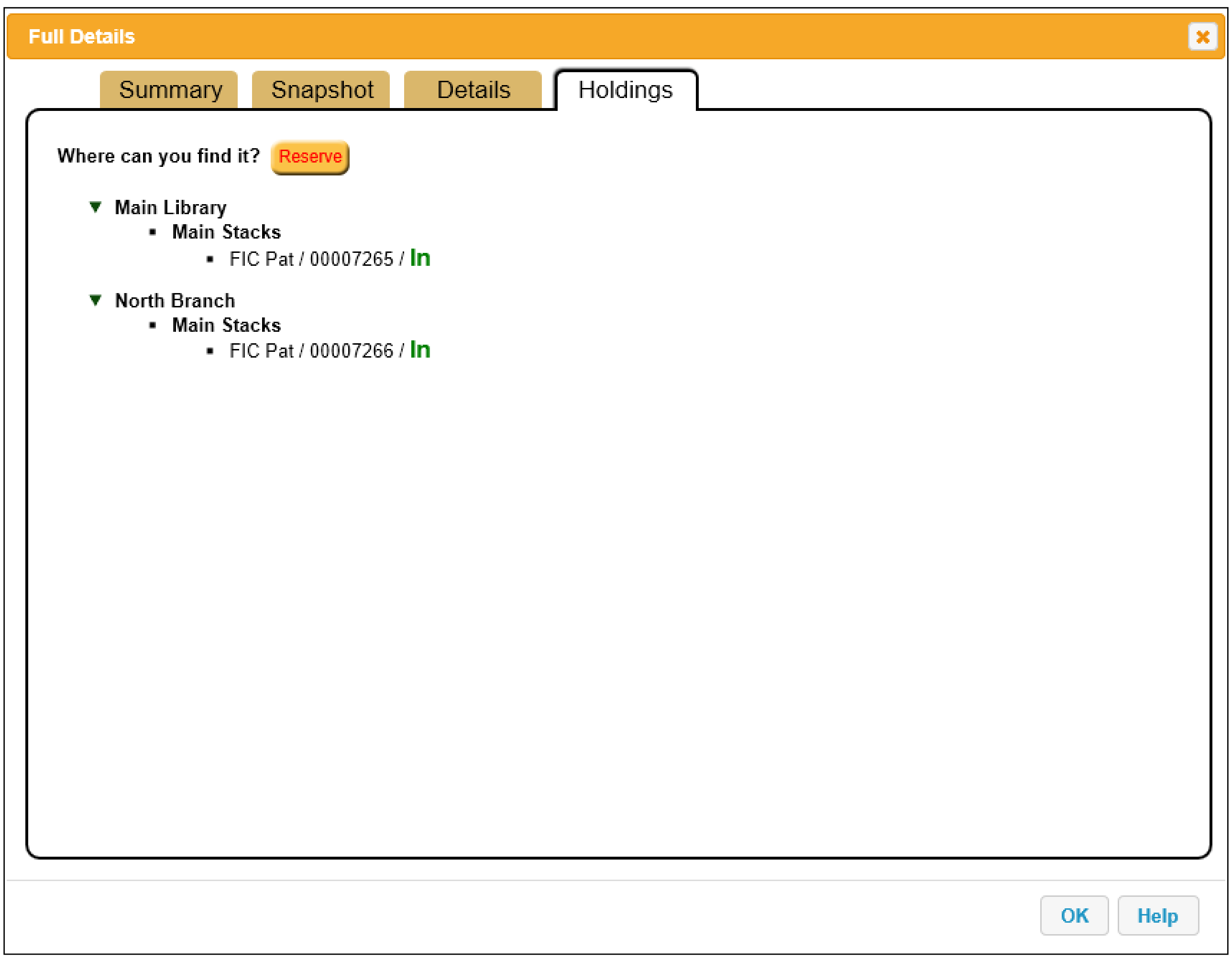
Allow Reserve Copies From Any Location (Centralized only)

If your library frequently moves items between branches to satisfy patron reservations, you can enable this setting to place reservations on all available copies, regardless of the patron's branch.

To reserve all available copies

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **OPAC**.
2. Click General And Patron Account Settings.
3. Under *Reserve Settings*, click **Yes** next to **Reserve Available Copies From Any Location**.
4. Click **Save**.

In **OPAC**, a single **Reserve** button displays on the **Holdings** tab of **Full Details**. All available copies that can fulfill the patron's request are reserved.

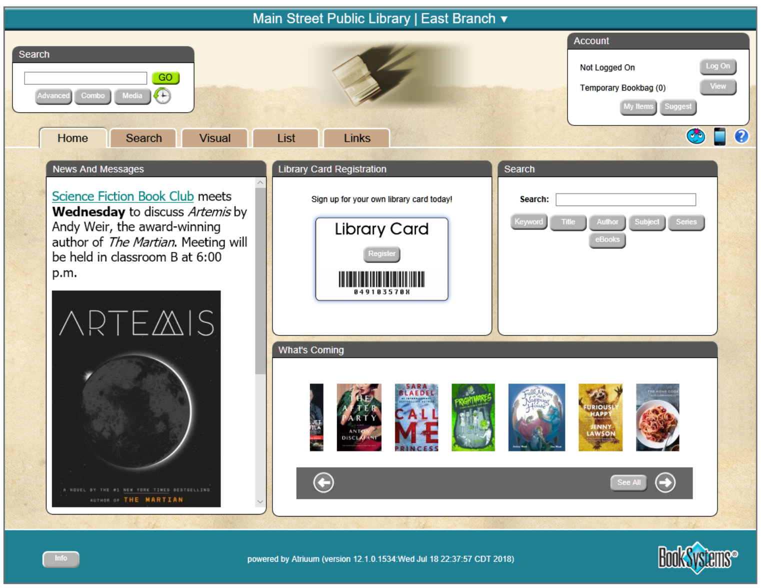


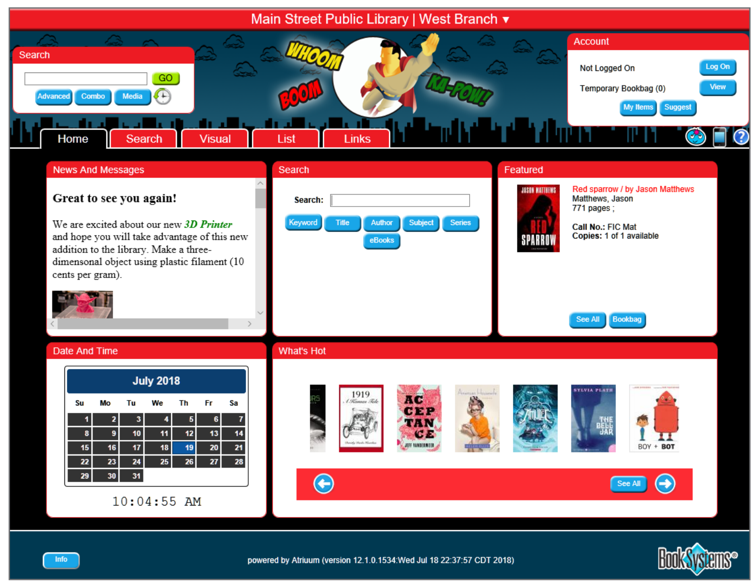
Branch Customization for OPAC (Centralized only)

This new option for **Centralized** libraries allows different branches to customize their public catalog with different themes, messages, and more.

This option can be enabled by calling Book Systems Tech Support.

Once this setting is enabled, staff with the **Set OPAC Administration Information** worker permission can edit various **OPAC** preferences for the branch they have log on permission for (if they have access to ***ALL***, they can edit all branches). Each branch can have its own theme, messages, and more. Widgets like **What's Hot** will display items from that branch only.

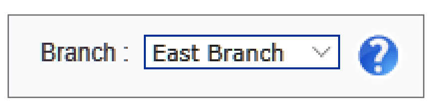




In the sample images above, two branches have customized their home pages to show different widgets and information for patrons. Patrons can switch between branches using the drop-down button at the top by the library name. Searches can default to all branches or search only the selected branch, depending on your settings.

Many aspects of **OPAC** can be customized. What follows is a list of options that can be modified per branch:

- Themes And Layouts
- Scheduled Themes
- News And Messages
- Library Information
- Custom Reserve Message
- Meet Your Librarian
- Reminders And Sayings
- Community Posts



A drop-down list on applicable forms allows workers with permission to switch between branches to modify settings.

Acquisitions Features (requires license)

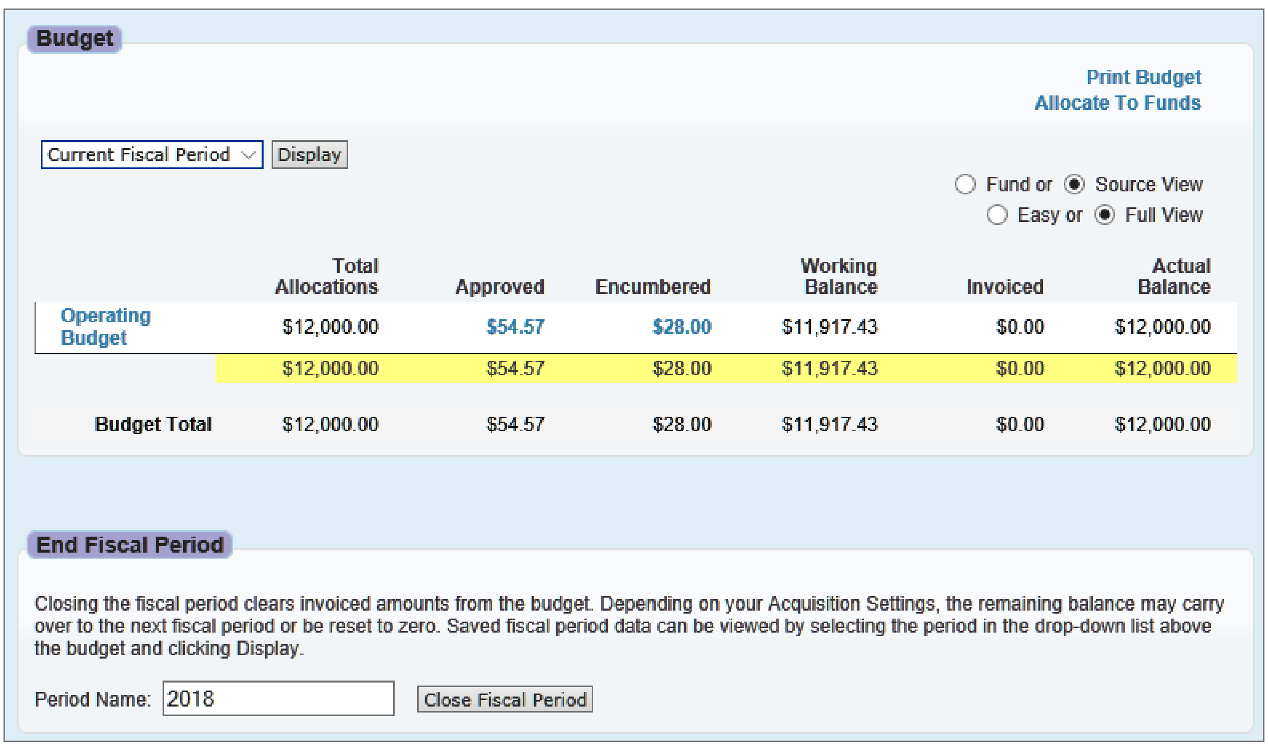
Atriuum's **Acquisitions** module has been streamlined to allow more customization and faster workflows.

Budget Configurations

Your Tech Support Specialist can set up your module in one of three configurations based on how you manage your money:

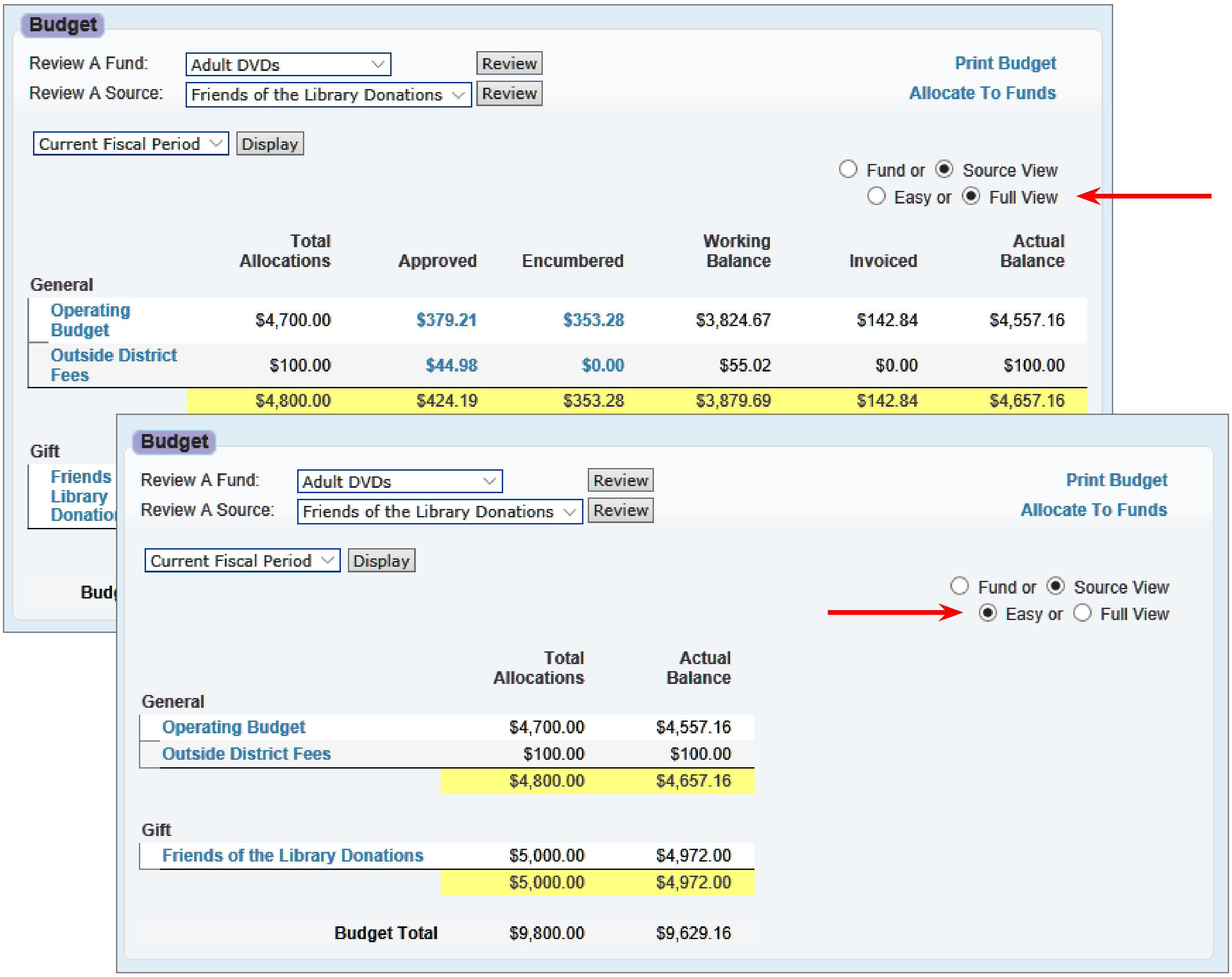
- **Full Budgeting** - multiple funds and sources allow you full control over where allocations are assigned and spent.
- **Simple Budgeting** - a single fund and source allow you to manage your allocations as a single pool of money.
- **No Budgeting** - you can still manage requests and update the status of orders if you have a different software for managing your budget.

Depending on how Book Systems sets up your module, you may see varying degrees of complexity within the product. The image below shows a simple budget with a single fund and source.



Easy and Full Views for Budgeting and Allocations

If you only need to see the funds you started with and what you have available, you can hide other columns and only show your allocations and balance. Simply toggle the radio button to switch between views.



Clear Budget At End of Fiscal Period

If you forfeit money not spent at the end of a financial or calendar year, you can enable a setting to automatically zero out your budget when you close the fiscal year using the **Budget** form.

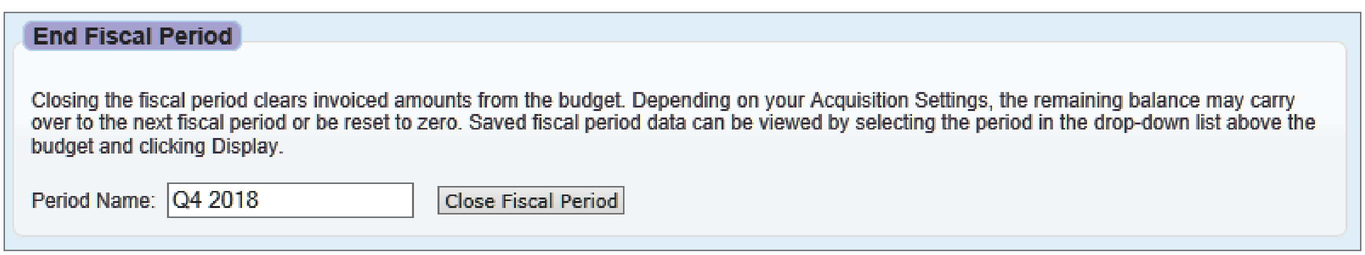
If the setting is disabled, closing the fiscal year will reset only your invoiced amounts. If the setting is enabled, closing the fiscal year will reset both your invoiced amounts and allocations to zero. Approved and encumbered amounts (for requests that have been approved and/or ordered but not yet invoiced) always roll over to the next fiscal period.

To enable automatic budget clearing

1. Click **Administration** from Atriuum’s **Menu Bar**, and then click **Acquisitions**.
2. Click **Acquisition Settings**.
3. Under *Other Settings*, next to **Clear Budget When Fiscal Year Is Closed:**, click **Yes**.
4. Click **Save**.

To close the fiscal period and reset amounts

1. Click **Acquisitions** from Atriuum’s **Menu Bar**. Under **Funds**, click **Budget**.
2. In the **End Fiscal Period** form, enter a name for the time frame in the **Period Name:** field (ex. ***FY2018***, ***Quarter 1 2018***).
3. Click **Close Fiscal Period**.

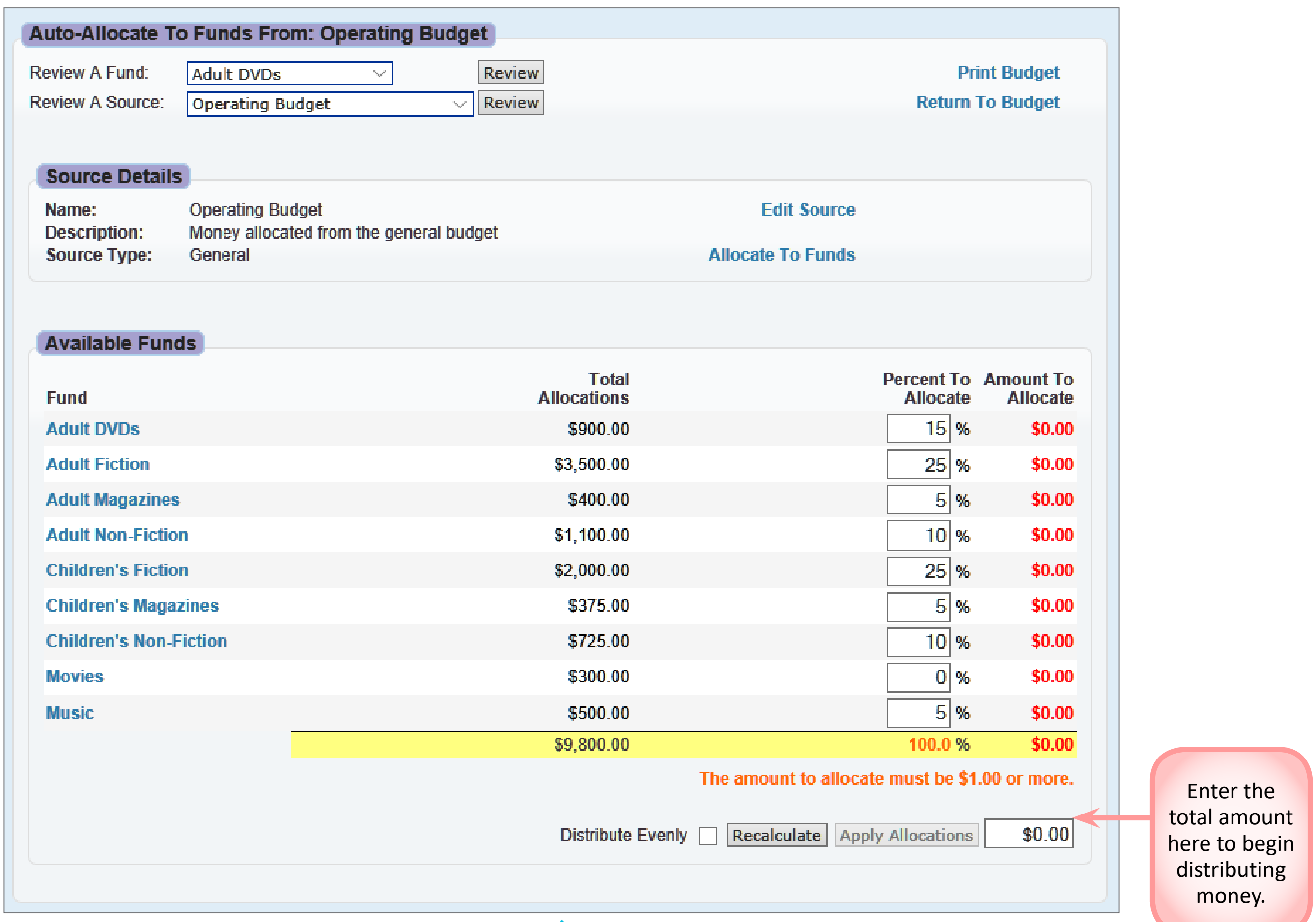


Auto-Allocate To Funds

Don't want to worry with complex calculations for your allocations? You can quickly allocate a source's money to all its funds by percentage. If your library distributes resources equally, you can use an alternative option to divide the money evenly between the funds.

To auto-allocate to funds

1. Click **Acquisitions** from Atriuum's **Menu Bar**; under **Funds**, click **Allocate**.
2. Click the **Review A Source:** drop-down button, and click again to select a specific source; then, click **Review**. The **Review Source** form displays.
3. Click Auto-Allocate to open the **Auto-Allocate To Funds From: *Fund Name*** form.
4. Enter a total amount to allocate in the field at the bottom of the **Amount To Allocate** column.
5. Choose how to allocate funds:
   - Enter percentages to assign to each fund. (The total must add up to 100%)
   - Click the **Distribute Evenly** check box to assign money equally between all funds.
6. Click **Apply Allocations**.


Auto-Allocate To Funds From: Operating Budget

Review A Fund: Adult DVDs Review
Review A Source: Operating Budget Review
Print Budget
Return To Budget

Source Details

Name: Operating Budget
Description: Money allocated from the general budget
Source Type: General
Edit Source
Allocate To Funds

Available Funds

Fund	Total Allocations	Percent To Allocate	Amount To Allocate
Adult DVDs	$900.00	15 %	$0.00
Adult Fiction	$3,500.00	25 %	$0.00
Adult Magazines	$400.00	5 %	$0.00
Adult Non-Fiction	$1,100.00	10 %	$0.00
Children's Fiction	$2,000.00	25 %	$0.00
Children's Magazines	$375.00	5 %	$0.00
Children's Non-Fiction	$725.00	10 %	$0.00
Movies	$300.00	0 %	$0.00
Music	$500.00	5 %	$0.00
	$9,800.00	100.0 %	$0.00

The amount to allocate must be $1.00 or more.

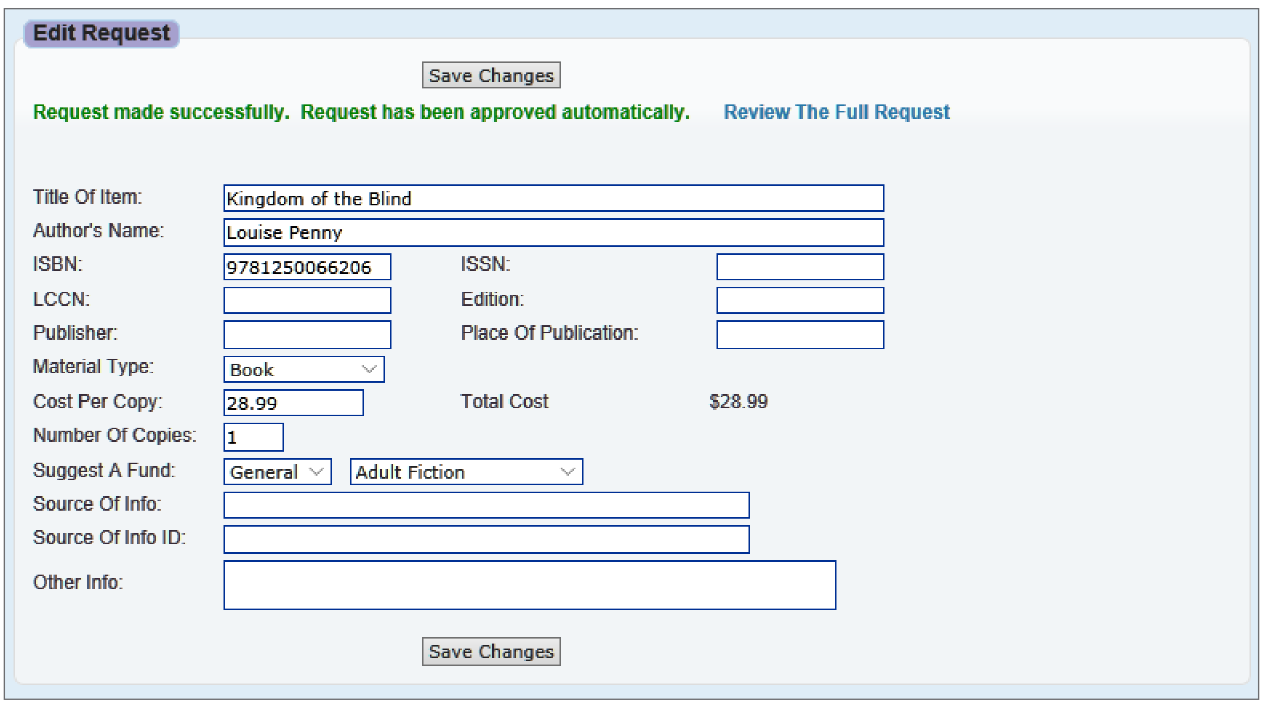
Distribute Evenly Recalculate Apply Allocations $0.00

Automatically Approve Worker Requests

To streamline your request management workflow, you can allow worker requests created through Atriuum to be automatically approved. Patron requests made from **OPAC** still require approval.

To automatically approve worker requests

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Acquisitions**.
2. Click Acquisition Settings.
3. Next to **Automatically Approve Worker Requests:**, click **Yes**.
4. Click **Save**.
5. When requests are made by workers using the **Create Request** form, they will be automatically approved upon saving, as shown below.

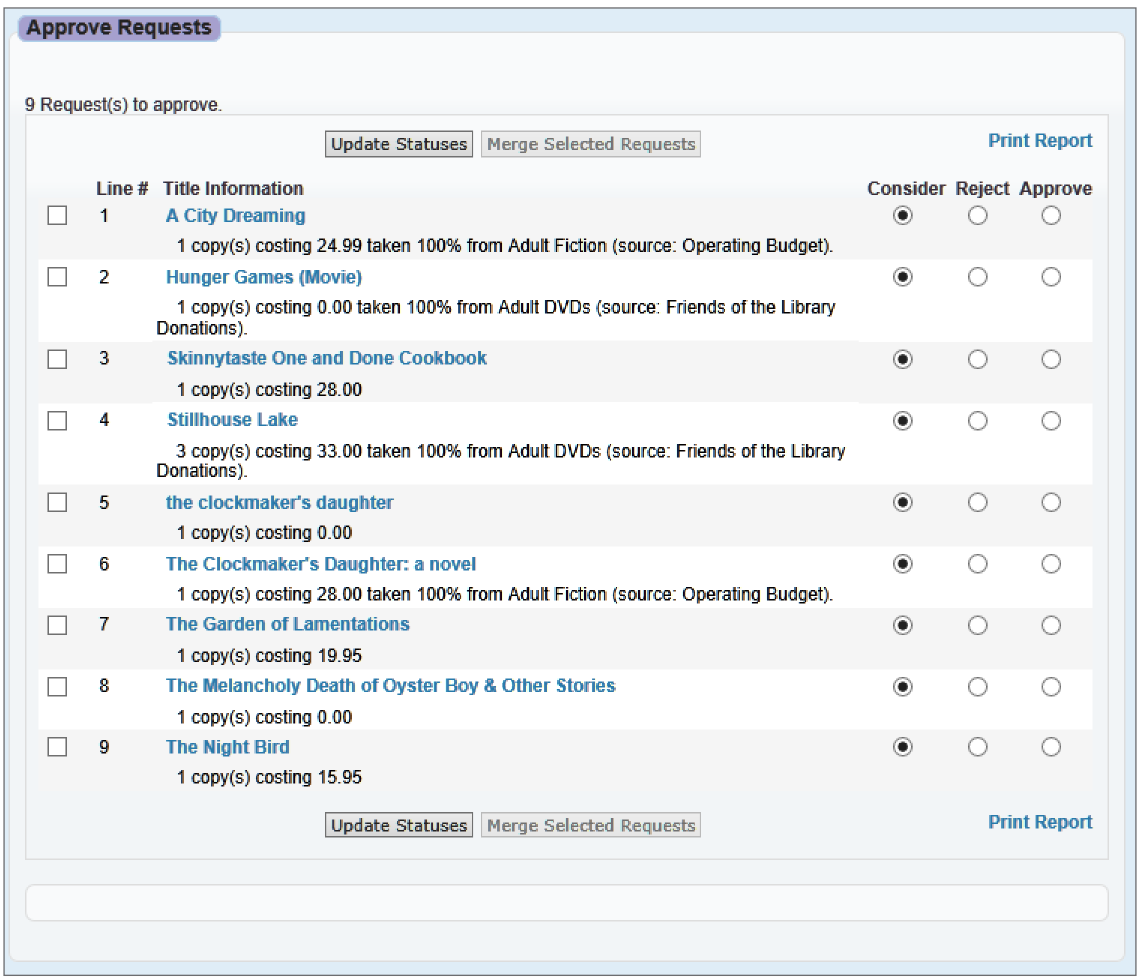


Approve Requests Report

This report allows you to quickly merge duplicate requests, reject extraneous requests, and approve multiple requests from one simple form.

To use the Approve Requests Report

1. Click **Acquisitions** from the **Menu Bar**; under **Requests**, click **Approve**.
2. The report displays. Each line has a check box and a row of radio buttons. By default, each request on the list is under consideration.
3. To merge duplicate requests, click to select check boxes, and then click **Merge Selected Requests**. A **Select Master Request** pop-up displays; click to select the request you prefer to be the main record. The records are combined. Click **Refresh**.
4. Click the radio buttons to indicate request status: click **Reject** for requests you need to remove from the report, and click **Approve** for those you intend to purchase. Then, click **Update Statuses**. Records are updated.



Approve Requests

9 Request(s) to approve.

Update Statuses | Merge Selected Requests | Print Report

	Line #	Title Information	Consider	Reject	Approve
	1	A City Dreaming 1 copy(s) costing 24.99 taken 100% from Adult Fiction (source: Operating Budget).			
	2	Hunger Games (Movie) 1 copy(s) costing 0.00 taken 100% from Adult DVDs (source: Friends of the Library Donations).			
	3	Skinnytaste One and Done Cookbook 1 copy(s) costing 28.00			
	4	Stillhouse Lake 3 copy(s) costing 33.00 taken 100% from Adult DVDs (source: Friends of the Library Donations).			
	5	the clockmaker's daughter 1 copy(s) costing 0.00			
	6	The Clockmaker's Daughter: a novel 1 copy(s) costing 28.00 taken 100% from Adult Fiction (source: Operating Budget).			
	7	The Garden of Lamentations 1 copy(s) costing 19.95			
	8	The Melancholy Death of Oyster Boy & Other Stories 1 copy(s) costing 0.00			
	9	The Night Bird 1 copy(s) costing 15.95			

Update Statuses | Merge Selected Requests | Print Report

EDI Ordering

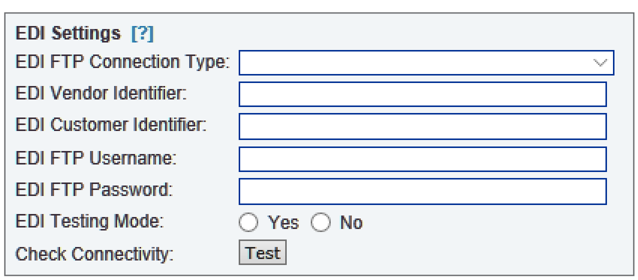
If you place your orders with a vendor that allows electronic ordering through **EDI** (**E**lectronic **D**ata **I**nterchange), you can place those orders directly through Atriuum. Setup has two parts: establishing shipping information and adding vendor information.

To establish EDI shipping information

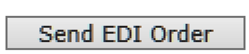
1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Acquisitions**.
2. Click **Acquisition Settings**.
3. Under **EDI Shipping Information**, enter the library's name and address in the applicable fields.
4. Click **Save**.

To add vendor EDI information

1. Click **Administration** from Atriuum's **Menu Bar**, and then click **Catalog**.
2. Click **Vendors**.
3. Click **Edit** next to the provider you need to modify.
4. Under **EDI Settings**, enter the information provided to you by your vendor.
5. Enable **EDI Testing Mode:** (click the corresponding **Yes** radio button) until you have completed successful test transactions. When your connection and settings are tested, return here and click **No**.
6. Click **Save**.
7. To test your connection at any time, click **Test** next to **Check Connectivity:**.

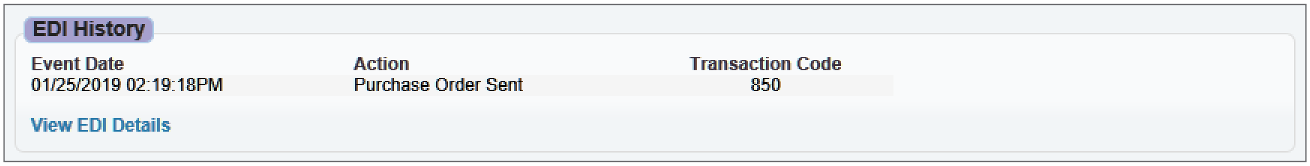


To place an order using EDI, simply click the **Send EDI Order** button on the **Edit Order** or **Review Order** form.

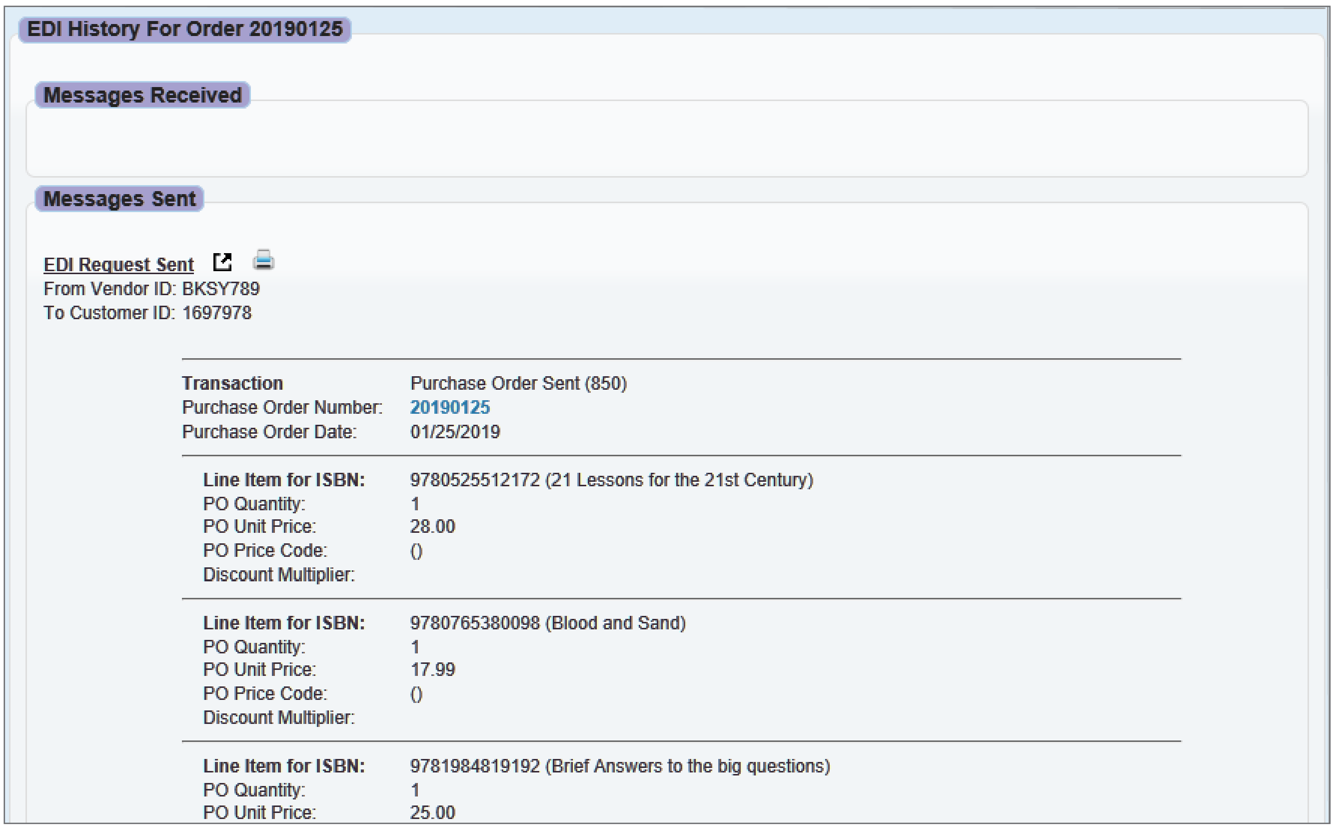


EDI Details for Orders

Information about outgoing and incoming messages associated with an order are now accessible directly from the **Review Order** form under **EDI History**.



To view detailed information about a message, click **View EDI Details**. Information includes item and vendor IDs, line items with ISBNs, quantities, and costs, and more.

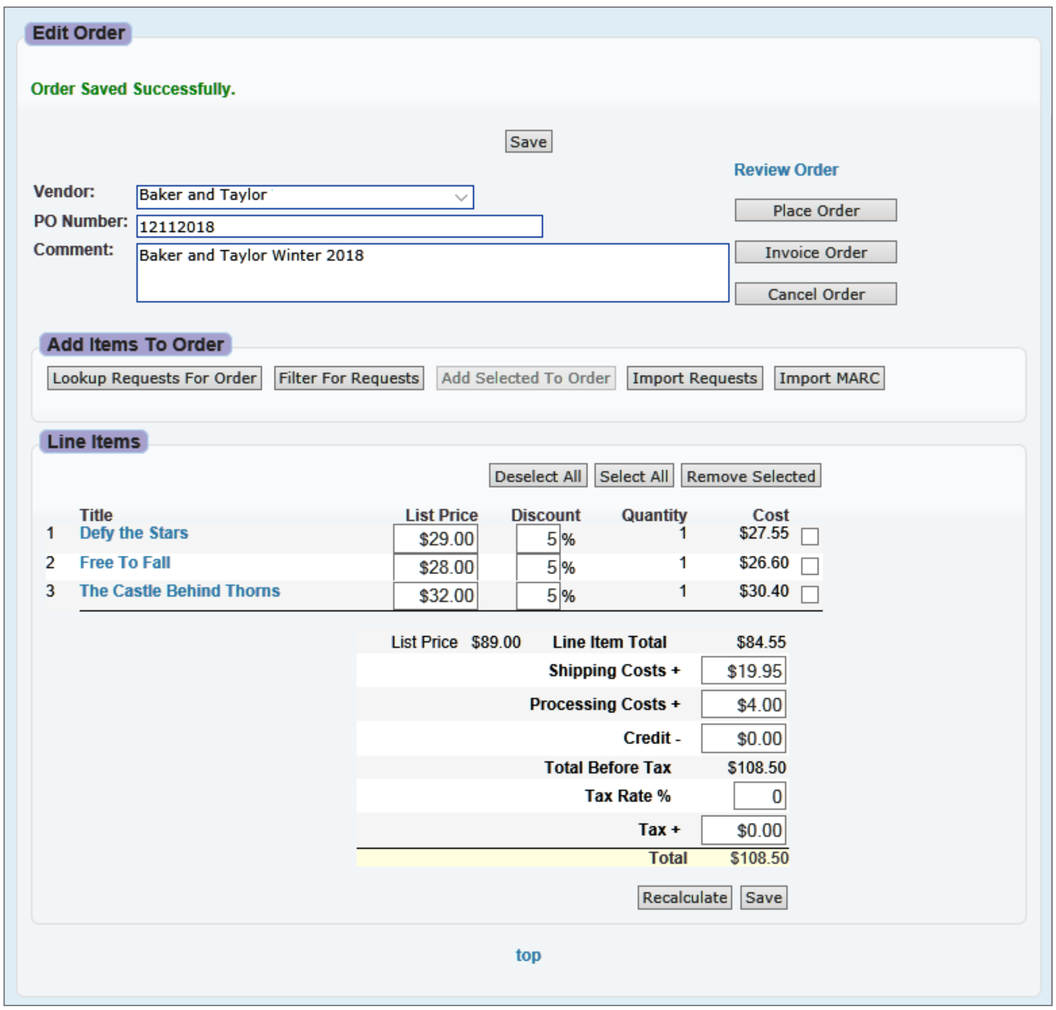


Place Order directly from Edit Order Form

If you have modified an order’s details to add prices or other information, you can now update the order’s status to ***Placed*** directly from the **Edit Order** form. Click **Place Order** to update the status after you have sent the order to the vendor. If you use **EDI** ordering, click **Send EDI Order** to transmit your electronic order and also update its status in Atriuum.

To edit and place an order

1. Click **Acquisitions** from Atriuum’s **Menu Bar**. Under **Orders**, click **Review Order**.
2. Search for the order you need to modify. The **Review Order** form opens.
3. Click **Edit Order**.
4. Fill in additional details, such as price, shipping and processing costs, etc. Click **Save**.
5. Click **Place Order** to update the order’s status within Atriuum after you have sent it to the vendor; click **Send EDI Order** to electronically send the order *and* update the order’s status in Atriuum at the same time.

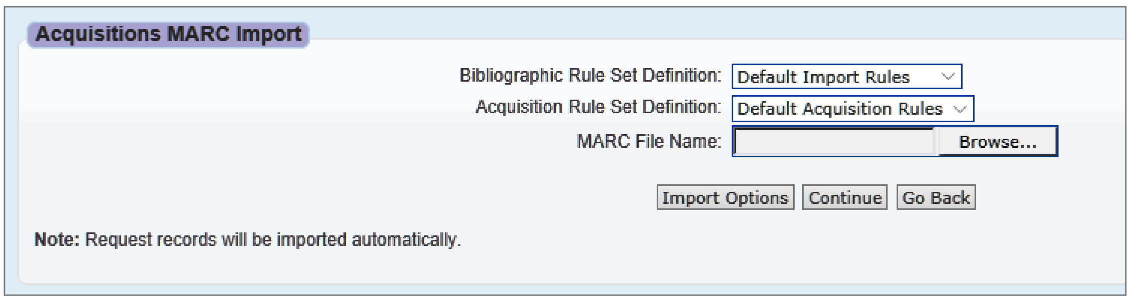


Import MARC as Order

If you create an order on a vendor's website (such as Ingram) that can be downloaded as a MARC file, you can import that file into Atriuum to create requests in the database and attach them to an order.

To import a MARC file to an order

1. Click **Acquisitions** from Atriuum's **Menu Bar**. Under **Orders**, click **Create Order**.
2. Select a vendor and enter a purchase order number; then, click **Create Order**.
3. On the **Edit Order** form, click **Import MARC**.



4. On the **Acquisitions MARC Import** form, click the first drop-down button, and click again to select a **Bibliographic Rule Set Definition**. This set contains rules for importing information specific to the title record.
5. Click the second drop-down button, and click again to select an **Acquisition Rule Set Definition**. This set contains rules for importing information specific to the request record, such as expected cost and number of copies.
6. Click **Browse...** (or **Choose File**, depending on your browser) next to **MARC File Name:**, and locate the file you need to import; then, click **Open**.
7. When you are ready to begin the import, click **Continue**.
8. After the file is imported, your order reopens with the items added to it along with expected cost and number of copies, and the associated requests are stored in the database.

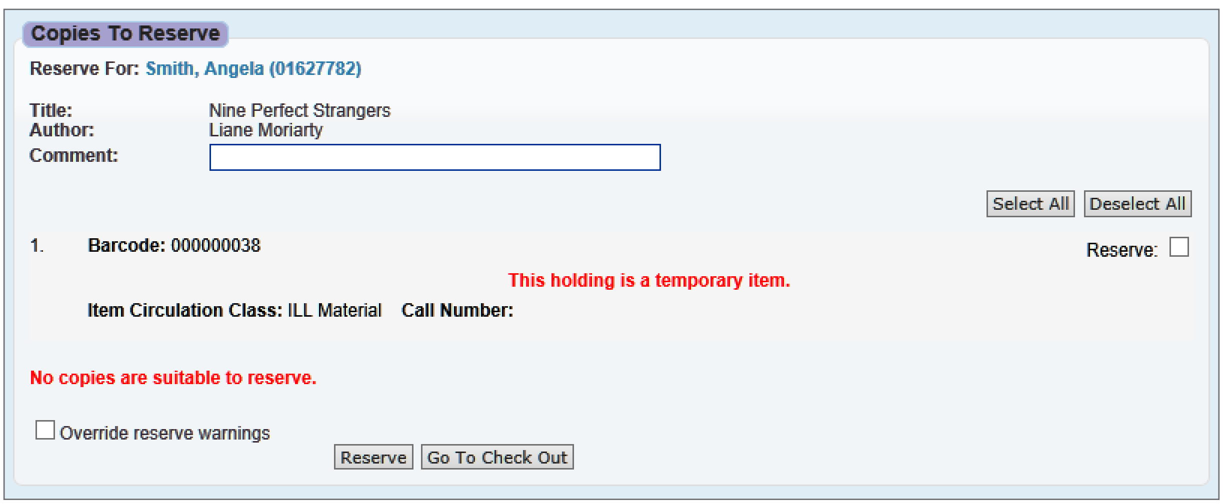
ILL Features (requires license)

Reserve Temporary (ILL) Items

Temporary records are created for managing ILL borrowing. If you create temporary records using the **Create A Brief Bibliographic And Holdings Record For ILL Circulation** form, you can also create reserves to hold those items for patrons.

To reserve an ILL item

1. Click **Circulation** from Atriuum’s **Menu Bar**. Under **Reserve**, click **Reserve**.
2. Search for the patron who needs the item.
3. Scan the item barcode, or use search options to locate the temporary item.
4. The **Copies To Reserve** form displays with the patron and item information. A **warning** alerts you that this is a temporary item.



5. Click the **Reserve** and **Override reserve warnings** check boxes, and then click **Reserve**.

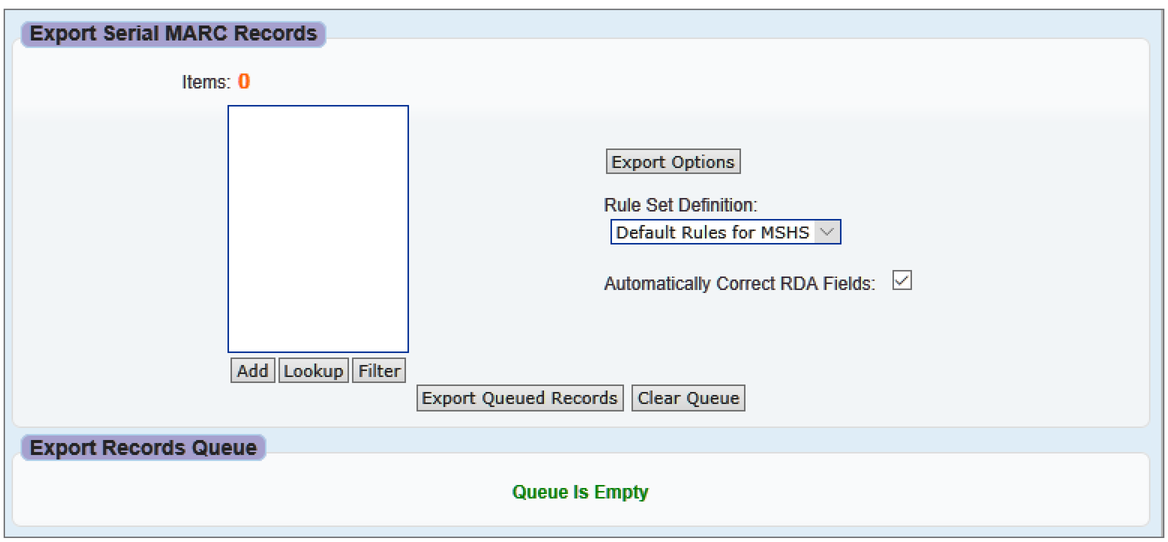
Serials Features (requires license)

Export MARC Serials Redesign

The **Export Serial MARC Records** form has been updated to resemble the standard **MARC Export** form.

To export MARC records for serials

1. Click **Serials** from Atriuum's **Menu Bar**. Under **Serials**, click **Export**.
2. Scan the ISSNs into the **Items: #** field, or use the lookup or filter options to find records.
3. The **Automatically Correct RDA Fields:** check box is enabled by default. This means Atriuum will check MARC fields to determine if the record is RDA compliant and update the MARC leader if needed.
4. Click **Export Queued Records**. A progress bar displays. After the export is complete, the form refreshes with a link to download the file.
5. Click **Download This File** and follow the options onscreen to save the file.



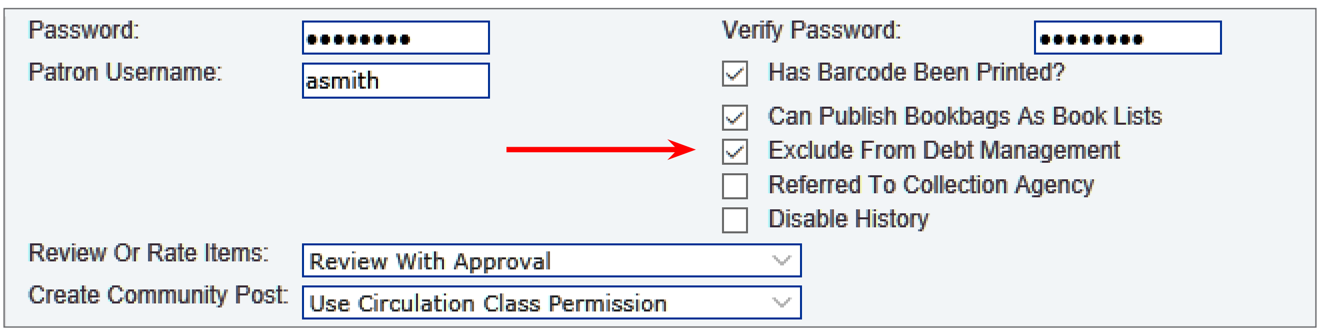
Debt Management Features (requires license)

Exclude From Debt Management for Individual Patrons

If you use this module to improve patron fine collection, you have always been able to exclude specific groups using **Patron Circulation Class**. Now, if there is a particular patron or small group you need to exempt, you can do so using the **Add/Edit Patron** form or the **Reclassify Patrons** form.

To exclude a single patron from Debt Management collection

1. Click **Patrons** from Atriuum's **Menu Bar**.
2. Under **Patron**, click **Edit**, and search for the patron you want to exempt. The **Edit Patron** form displays.
3. In the *Other Info* form, click to select the **Exclude From Debt Management** check box.
4. If the patron was already referred, click to deselect the **Referred To Collection Agency** check box so that this patron will be removed from the delinquent patrons list overnight.
5. Click **Save**. The patron will not be referred to the collection agency in the future.



To exclude a group of patrons from Debt Management collection

1. Click **Patrons** from Atriuum's **Menu Bar**.
2. Under **Bulk**, click **Reclassify**.
3. Enter the patron barcodes in the field, or search or filter for the patrons you need.
4. Click to select the **Change Exclude From Debt Management** check box, then click the drop-down button, and click to select **Yes** to exempt these patrons from collections.
5. Click **Reclassify Patrons**.