



**Atrium®**  
V 12



# What's New in Atrium 12.0

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## What's New in Atrium 12.0

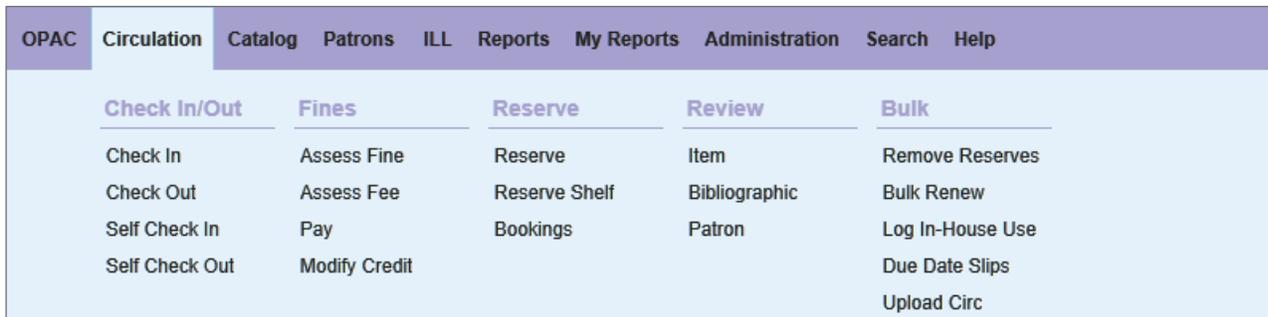
### Librarian Desktop Interface

#### Menu Redesign

Atrium's **Menu Bar** has been completely revamped with a new look and convenient subcategories in each main menu category to make finding the option you need easier than ever. You can choose from two options: a **Buttons Menu** (*that's also great for touch screens*) or a minimalist **Text Menu** style.



*Buttons Menu Style*



*Text Menu Style*

#### To select your Menu Style

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **Library**.
3. Click **Worker Settings**.
4. Under *Library Settings*, click the **Buttons** or **Text** radio button to change your menu style.
5. Click **Save** to keep your changes. The following message will appear. Either click on the blue link or press F5 on your keyboard to activate your menu style choice.



## What's New in Atrium 12.0

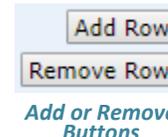
### Librarian Desktop Layout

Now you can customize your Atrium Home Page Layout using a form similar to configuring your **OPAC** Layout. Widgets are no longer editable from the Librarian Desktop; all customization now happens in one place. Access this form from the configuration panel by clicking  under the Atrium logo follow the steps below.



### To change your Librarian Desktop layout

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **Library**.
3. Click **Librarian Desktop Layout**.
4. Use the **Add Row** and **Remove Row** buttons and drop-down lists to customize your Librarian Desktop.
5. Use the Green Arrow buttons to resize and make the widget sizes larger or smaller.
6. To edit **News And Messages** or **Quick Links**, click the appropriate **link** after saving your other changes.
7. To enter preferences for other widgets, use the fields and radio buttons.
8. Click **Save**.



Librarian Desktop Featured

### To push your Librarian Desktop layout to workers

1. Configure your own Desktop with the widgets your staff needs to work efficiently and click **Save**.
2. Click **Administration** from Atrium's **Menu Bar**.
3. Click **Library**.
4. Click **Worker Settings Defaults**.
5. Under **Librarian Desktop Configuration**, click to select the **Existing Workers** check box.
6. Click **Save**.
7. Your saved configuration will be pushed out to all Worker accounts.

# Atrium®

## What's New in Atrium 12.0

### New Librarian Desktop Theme

If you'd like a different look for your Librarian Desktop, consider enabling **Aqua**, the new theme, or choose another option.

1. Open the **Configuration** panel under the Atrium logo.
2. Click **Select Theme**.
3. Click the theme name to preview it.
4. Click **Confirm** to save the theme or **Cancel** to keep your current theme.



Librarian Desktop Featured

A screenshot of the Atrium Librarian Desktop interface. The top navigation bar includes icons for Home, Quick Cataloging, Item Lookup, Patron Lookup, and Cart Lookup. Below the navigation bar is a menu with options like OPAC, Circulation, Catalog, Patrons, Reports, My Reports, Administration, Search, and Help. The main content area is divided into several sections: 'News And Messages' with a welcome message and features list; 'Lookup For Check Out' with search fields for patron and item; 'Yesterday's Stats' showing bibliographic and holding records; 'Quick Links' with shortcuts to AVL, Dictionary, Google, Merriam-Webster, and Weather; and 'Date And Time' showing a calendar for May 2018 and the current time (01:37:16 PM). A 'Configuration' panel is open on the right side, showing options to 'Configure The Toolbar', 'Configure The Librarian Desktop Layout', and 'Show Animation Effects'. The 'Current Theme' is set to '[Aqua]', and the 'Select Theme' button is highlighted with a red box.

Librarian Desktop Aqua Theme

## Cataloging Features

### Subject Heading Enhancements

Three new features have been added to speed up standardization of subject headings of your bibliographic records using the **Analytics** form:

- Delete subject headings with a single click.
- Add a row of subject headings with a single click.
- Standardize capitalization for the whole record using a simple pop-up.

1. Click **Catalog** from Atrium's **Menu Bar**.
2. Under **Item**, click **Edit**.
3. Search for the record whose headings you need to modify.
4. If needed, click the **View** drop-down button in the top right corner, and click again to select **Full View**.
5. On the **Analytics** form, you now have three new Options (shown circled on right).
6. To remove a subject heading, click . There is no need to save until you are finished editing all the headings.
7. To add a new row of fields, click **Add More Subject Heading Fields**.
8. To standardize the capitalization of subject headings, click **Change Capitalization** and select **UPPERCASE**, **Sentence case**, or **Title Case**. Then click **Apply**.
9. Click **Save** to keep all your subject heading changes for this record.

*Analytics form (Full View)*

**Tip!** You can also quickly update an entire group of holdings' subject headings using the **Reclassify Items** form. Click **Catalog** from Atrium's **Menu Bar**. Under **Bulk**, click **Reclassify**.

*Reclassify Items form*

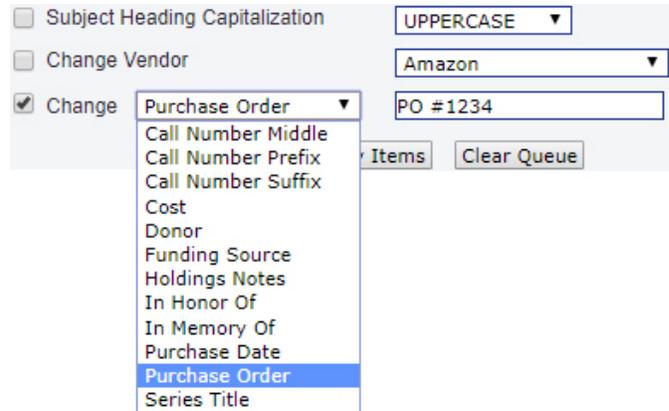
*Change Capitalization Options*

## What's New in Atrium 12.0

### Reclassify Purchase Order

If you need to add a PO number to multiple holdings, you can now do so using the **Reclassify Items** form.

1. Click **Catalog** from Atrium's **Menu Bar**.
2. Under **Bulk**, click **Reclassify**.
3. Scan or enter the barcodes of the items, or **Filter** to find and queue them.
4. Click the last check box on the form to select it.
5. Click the drop-down button, and click again to select **Purchase Order**.
6. Enter the PO number in the field (see example right).
7. Click **Reclassify Items**.



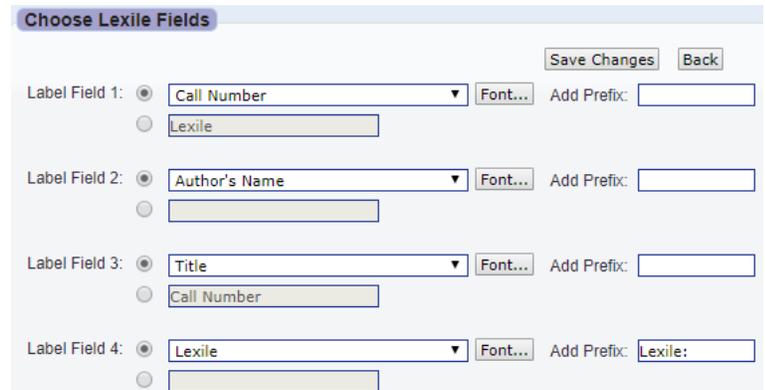
*Reclassify Items form*

### Study Program Label Prefixes

Lexile® and Fountas & Pinnell™ Study Program labels can now be customized with prefixes so that you can put a label and a value on the same line.

#### To customize your Study Program labels

1. Click **Catalog** from Atrium's **Menu Bar**.
2. Under **Labels**, click **Study Programs**.
3. Click the program **name**.
4. Click **Choose Fields And Set Alignment** to customize your labels.
5. To add a prefix, enter it in the **Add Prefix** field.
6. Use the radio buttons, drop-down lists, and fields to select which information to display.
7. Click **Save Changes**; then click **Back** to queue and print your Study Program labels.



*Choose Fields And Set Alignment form*

**Tip!** Click **Font...** to change the Font, Style, Size, Color, and Alignment and click Set Font.

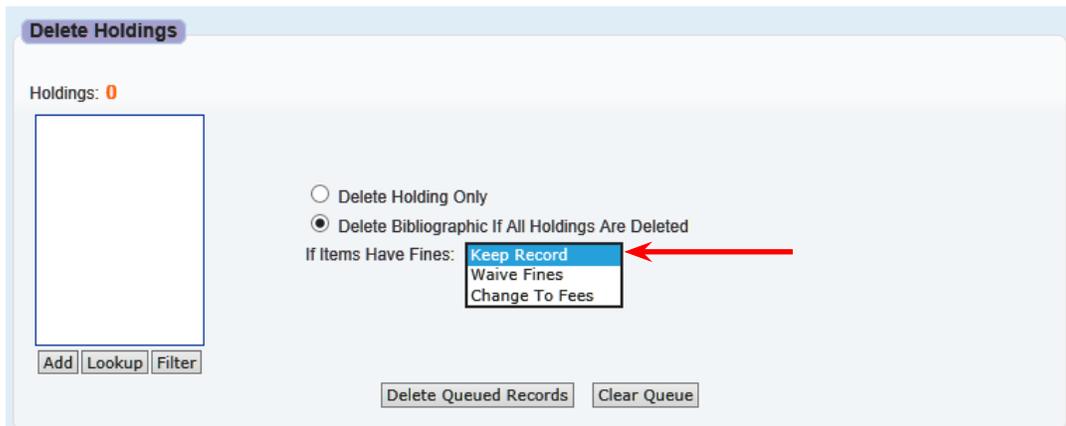


*Sample Lexile Label  
(Avery 5160 label type)*

### Delete Items with Attached Fines

Traditionally, items that have fines associated with them cannot be deleted. However, now you have options to waive fines or convert them to fees during deletion so that you can remove holding records from your database. If you convert fines to fees, you can still collect money from patrons without having the lost or damaged item holding records cluttering up your database.

1. Click **Catalog** from Atrium's **Menu Bar**.
2. Under **Bulk**, click **Delete Holdings**.
3. Scan or enter the barcodes of items you want to delete or **Filter** to locate items and queue them.
4. Next to the **If Items Have Fines** option, click the drop-down button, and click again to select an option.
  - **Keep Record** – Items won't be deleted because fines are associated with the holding.
  - **Waive Fines** - Fines will be waived from the database, and holdings will be deleted.
  - **Change To Fees** - Fines will be converted to fees, meaning they will only be attached to the patron record. The reason is kept in the **History Action Comment** so that the item's title is preserved in case the patron disputes the charge.
5. Click **Delete Queued Records**.



To see a list of patrons that had items that were deleted and the fines changed to fees, click **Reports** from Atrium's Menu Bar. Under **Administration**, click **History**. Next to the Limit History By Action, click the drop-down button, and click **Assess**. Click **Generate Report**.

Line #	Title	Author's Name	Holdings Barcode	Patron Name	History Action Comment	Date of Action	History Action	Worker Name
1				Jones, William "Bill"	Assess Fee: \$3.70 Reason: Deleted (Arizona), worker chose to change all fines to fees.	05/23/2018 02:27:19PM	Assess	scott

*History Report using Limit History By Action "Assess"*

## OPAC

### New Emoji Theme

Kids are all about emojis and young library patrons will love this new theme celebrating the world of emoji.

#### To select the Emoji Theme

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **OPAC**.
3. Click **Themes And Layouts**.
4. Indicate when to use this theme:
  - To use this theme on all machines and browsers, click the drop-down button next to **Default Main Theme** under **Default OPAC Theme Settings For Library**. Click again to select **Emoji**.
  - To use this theme only on certain machines, such as a machine in the children's section of the library, click the drop-down button next to **Main Theme For This Machine**, and click again to select the theme name.
5. Click **Save**.
6. Always preview your changes in **OPAC**. If you use **Scheduled Themes**, remember this theme may be overridden based on your pre-selected dates for scheduled themes.



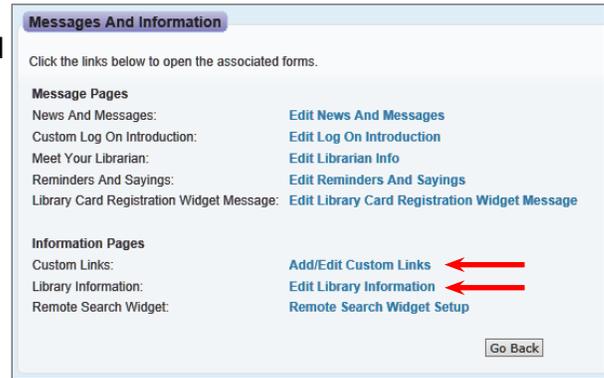
# What's New in Atrium 12.0

## Editing Text For Introduction and Information Pages

The introduction and information pages have been combined so that you only need to visit one form to modify text that displays in **OPAC**.

### To edit Custom Links and Custom Links Introduction

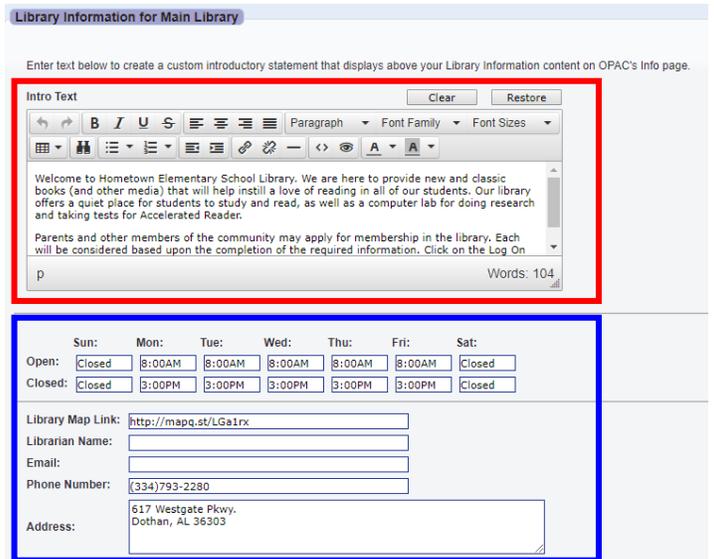
1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **OPAC**.
3. Click **Messages And Information**.
4. Click **Add/Edit Custom Links**.
5. Modify the introductory text.
6. Add or remove links and images as needed (see screenshot on next page).
7. Click **Save**.



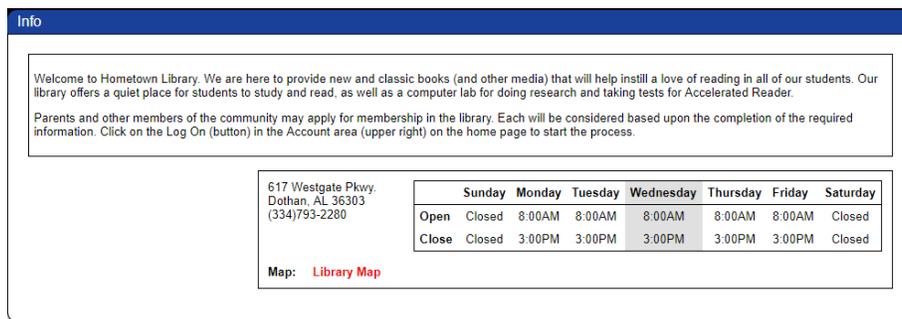
*OPAC Administration – Messages and Information*

### To edit Library Information and Library Information Introduction

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **OPAC**.
3. Click **Messages And Information**.
4. Click **Edit Library Information**.
5. Modify the introductory text (shown right in red box).
6. Modify library hours, contact information, etc. (shown right in blue box).
7. Click **Save**.



*Library Information form*



*Library Info in OPAC*

## Custom Link Images

For **Custom OPAC Links** and **Quick Links Configuration**, you can now upload images to display with links for quick visual identification for your workers on the Librarian Desktop and for your patrons in **OPAC**. Images will display on the **Links** widget (*if enabled*) as well as the **Links** tab in **OPAC**.

The form includes the following fields and controls:

- Name:** Text input containing "Google" and an "Update" button.
- URL:** Text input containing "http://www.google.com" and a "Clear" button.
- Description:** Text input containing "Popular web search engine".
- Image:** A small image of the Google logo and a "Delete" button.
- Link List:** A scrollable list containing "AVL", "Dictionary", "Google", "Merriam-Webster's Word Central", "Weather", and "Tennessee Electronic Library". A "Delete" button is positioned to the right of the list.
- Navigation:** Up and down arrow buttons and a "Save" button at the bottom right.

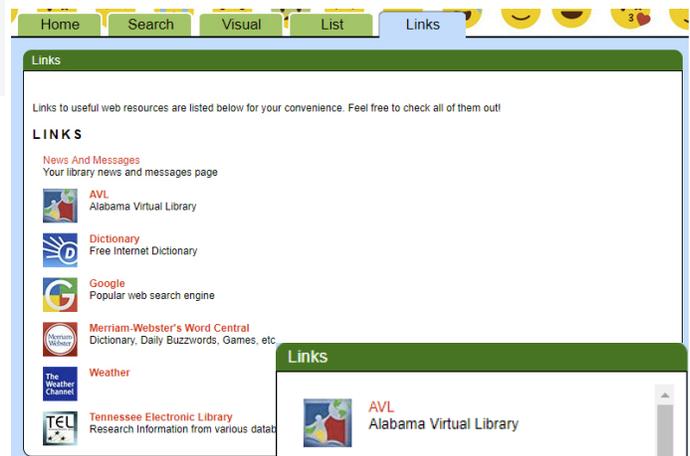
*Add/Edit Custom Links form*

### To add images to Custom OPAC Links

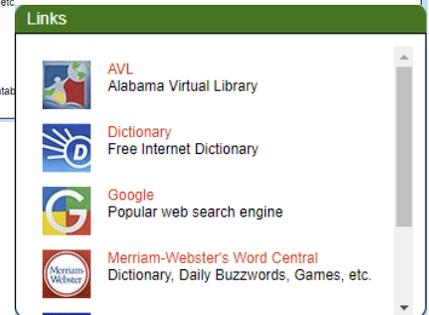
1. Click **Administration** from Atrium's **Menu Bar**, and then click **OPAC**.
2. Click **Messages And Information**.
3. Click **Add/Edit Custom Links**.
4. To add an image to an existing link, click to select the name in the list.
5. Next to the **Image** field, click **Browse** or **Choose File** (*depending on your browser*).
6. Find the image file you want to use and click **Open**.
7. The image displays. Click **Update** to save this entry.
8. Click **Save**.

### To add images to Librarian Desktop Quick Links

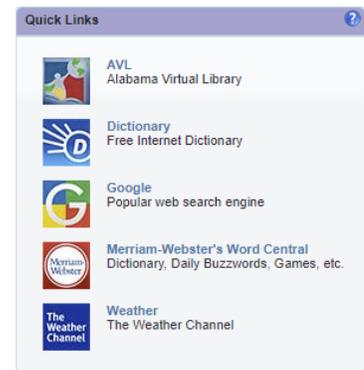
1. Click **Administration** from Atrium's **Menu Bar**, and then click **Library**.
2. Click **Quick Links Configuration**.
3. To add an image to an existing link, click to select the name in the list.
4. Next to the **Image** field, click **Browse** or **Choose File** (*depending on your browser*).
5. Find the image file you want to use and click **Open**.
6. The image displays. Click **Update** to save this entry.
7. Click **Save**.



*Links Tab in OPAC*



*Links Widget in OPAC*



*Quick Links Widget for Librarian Desktop*

### Library Card Registration Widget

You can make it even easier for patrons to fill out an online registration form by adding a widget to your OPAC home page.

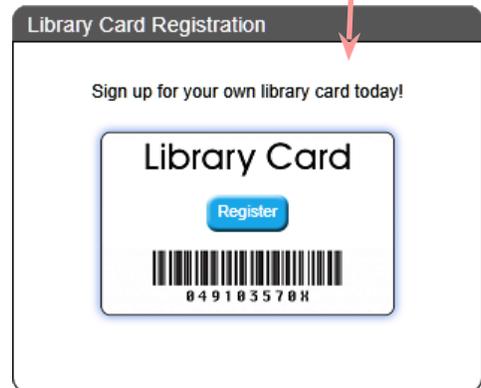
#### To enable and set up Online Registration in OPAC

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **OPAC**.
3. Click **General And Patron Account Settings**.
4. Under *My Items Settings*, next to **Allow Patrons To Register For Library Card Online**, click **Edit Settings** to open the **Online Registration Settings** form.

Allow Patrons To Register For Library Card Online: [Edit Settings](#)

5. Click **Yes** to enable this option.
6. Under **Registration Fields**, click to select which fields that are required.
7. Click **Yes** or **No** to determine whether patrons must agree to Terms and Conditions; after saving, click the [link](#) to edit those if needed. When finished editing click **Save Changes**.
8. Enter an email address of the person who should be notified about new card requests.
9. Click **Save**.

This text can be customized with instructions unique to your library.



*Library Card Registration Widget for OPAC*

#### To add the Library Card Registration widget to your OPAC

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **OPAC**.
3. Click **Themes And Layouts**.
4. In the *Widgets* section, click a widget drop-down button, and click again to select **Library Card Registration** from the list.
5. Click **Save**.

#### To customize the Library Card Registration widget message

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **OPAC**.
3. Click **Messages And Information**.
4. Click **Edit Library Card Registration Widget Message**.
5. Enter a custom message and click **Save**.

### Your Library App Widget

Encourage patrons to download Librista™, the app for searching the library catalog and allowing patrons to manage their account. Librista is available for supported Apple® devices and Android™ devices (see pg. 34).

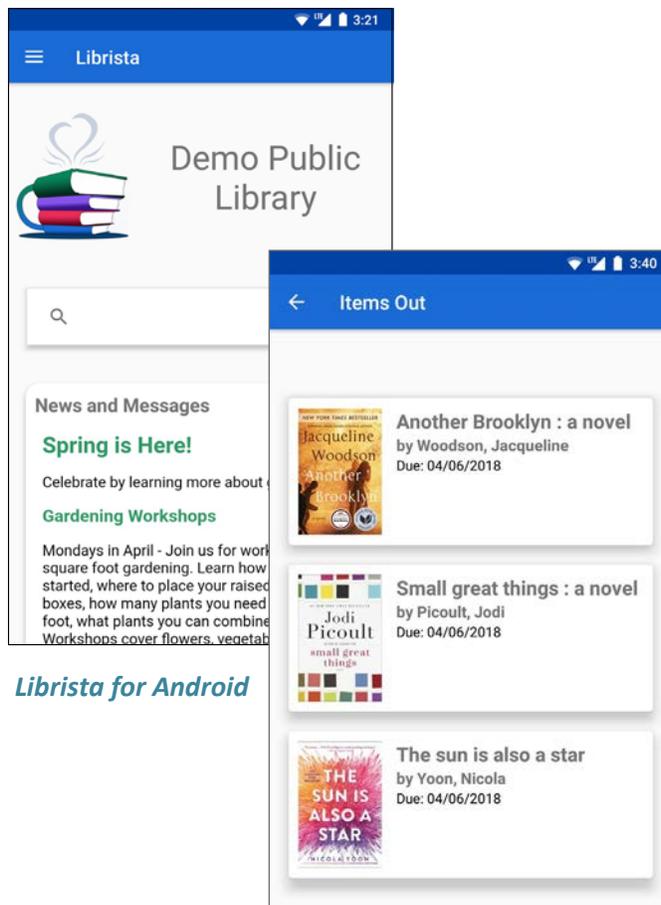
Add the **Your Library App** widget to your **OPAC** home page, and patrons can simply scan a QR code on their mobile device to open the App Store™ or Google Play™ store and download the app. Atrium automatically detects which kind of mobile operating system the patron is using.

Apart from adding the widget to promote the app, no additional setup is required on your end. Your patrons can log on with their existing usernames and passwords just like they do in My Items. Your **OPAC** settings regarding account permissions, reserves, etc. carry over to the app.

### To add the Librista widget to OPAC

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **OPAC**.
3. Click **Themes And Layouts**.
4. In the *Widgets* section, decide where you want the widget to display, and then use the drop-down list to select **Your Library App**.
5. Click **Save**.
6. Preview your changes in **OPAC**.

**Note:** For more information on the Librista app see page 34.



*Librista for Android*



*Librista Widget for OPAC*

OPAC Features

## Total Patron Savings Widget

Remind your patrons just how valuable the library can be! Add the **Total Patron Savings** widget to your **OPAC** to show the total amount patrons have saved in the last 365 days by borrowing books, music, and movies from the library instead of purchasing them.

### To enable the Total Patron Savings widget for OPAC

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **OPAC**.
3. Click **Themes And Layouts**.
4. In the *Widgets* section, click a widget drop-down button, and click again to select **Total Patron Savings** from the list.
5. Click **Save**.



*Total Patron Savings Widget for OPAC*



*Circulation Receipt with Patron Savings*

### To show Patron Savings on Circulation Receipts

You can also show individual patrons how much their current visit to the library has saved them.

### To enable the Patron Savings receipt setting

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **Circulation**.
3. Click **Circulation Settings**.
4. In the *Receipt Settings* section, click **Yes** next to **Print Patron Savings in Footer**.
5. Click **Save**.
6. The savings will display at the bottom of the patron receipt even if you include footer text on receipts.

You saved \$33.98 by borrowing these items from your library instead of buying them!

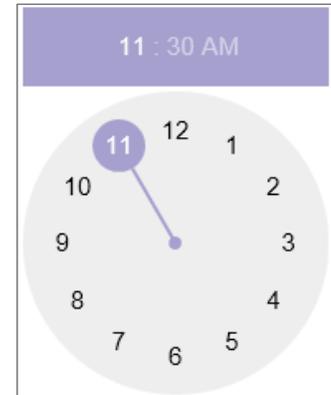
## Community Events

Community posts can now be designated as **Groups** or **Events** (specific time/date). This is true for librarian posts created in the Librarian Side of Atrium as well as patron-created posts in **OPAC** using the **Interests** tab when logged on to **My Items**. For a brief introduction to the Community feature, click on the **Add Community Post** form to watch a video about using Community to expand your library's reach.

To show community content in widgets and searches, enable the **Show Community Search Results** setting. Click **Administration** from Atrium's **Menu Bar**, and then click **OPAC**. Click **Searching**. Under *Search Results Options*, click **Yes** next to **Show Community Search Results**, and click **Save**.

### To create a post in the Librarian Side of Atrium

1. Click **Patrons** from Atrium's **Menu Bar**.
2. Under **Community**, click **Add Post**.
3. Enter a name and description (required).
4. Choose whether this is a Group or an Event. If it is an Event, pick a start date (required); click **+ Add Time** and use the clock (*shown right*) to select a start time.
5. Enter contact information, social media links, and keywords as needed.
6. Click **Save**.



*Click to select start time for an Event*

## Upcoming Events Widgets

Highlight events that are happening in the library or community by enabling this new widget on your **OPAC** home page.

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **OPAC**.
3. Click **Themes And Layouts**.
4. In the *Widgets* section, click a widget drop-down button, and click again to select **Upcoming Events** (cycles through events one at a time) or **Upcoming Events Slider** (scroll through events using arrow buttons).
5. In the **Days In The Future To Show Upcoming Events** field, enter a number of days. For example, if you enter 14, then events for the next two weeks will display.
6. Click **Save**.



*Upcoming Events Widget for OPAC*



*Upcoming Events Slider Widget for OPAC*

## What's New in Atrium 12.0

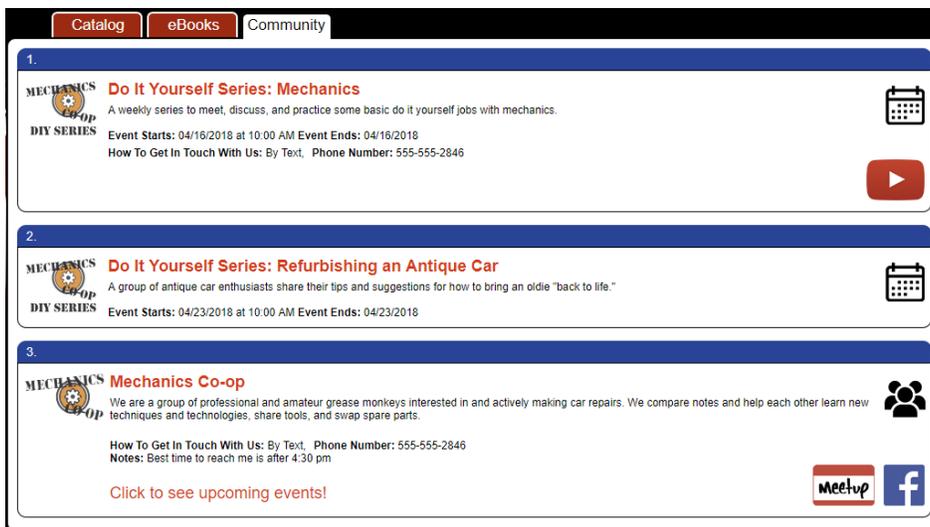
You can also filter for community events or groups using the community report.

1. Click **Patrons** from Atrium's **Menu Bar**.
2. Under **Community**, click **Report**.
3. Use the drop-down list to select a post type, and then click **Generate Report**.



### Community Searches

Community search results have two new icons to indicate whether the post is for a **Group** or an **Event** so patrons can quickly skim through the list to find what they need.



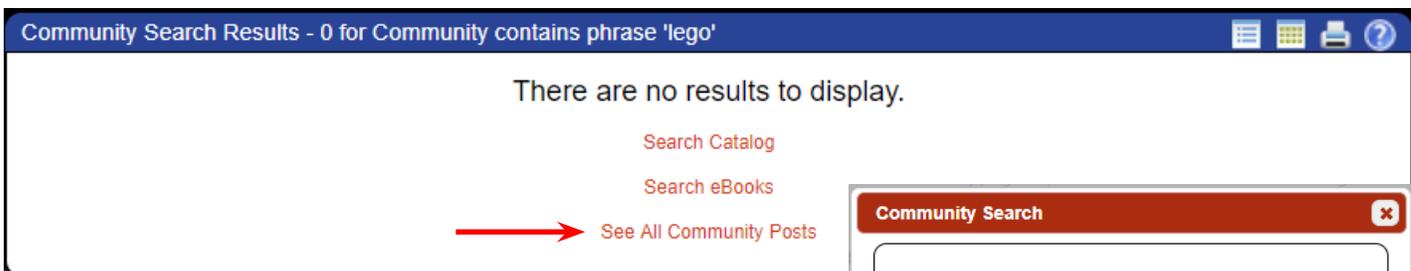
Support for a YouTube Link

Event

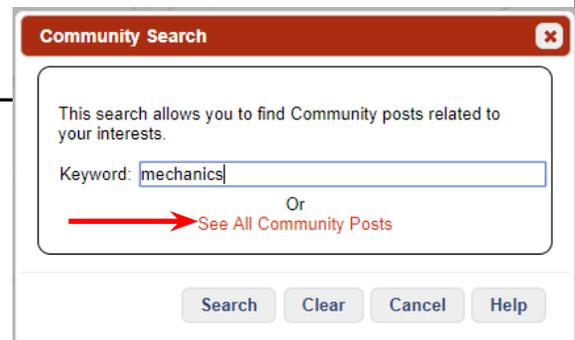
Group

Community Search Results in OPAC

If your search does not return results, you can click a new link to see ALL approved Community posts, regardless of keyword.



You have the same option using the **Community Search** pop-up accessible from the **Search** tab in **OPAC**.



## Patron Features

### Email Validation

Atrium now automatically detects if an email is incomplete when you save the record so you can correct the problem before emails are returned undeliverable. This feature is on the **Add/Edit Patron** form.

Email Address:   
**Error: "genna@mail." is not a valid email address.**  
*Add/Edit Patron form*

### Disable Patron History

You can disable patron history for specific individuals using a check box on the **Add/Edit Patron** form or the **Reclassify Patrons** form.

When disabled, history will still be collected for fines and fees, but identifying information such as item titles, authors, and barcodes will be hidden to protect patrons' privacy. Once this option is in place, past history will be cleared overnight.

6	Identifying information is hidden	Clark, Elizabeth	Assess Fine: \$1.00 Reason: Overdue book. Checked in on 08/16/2018. Was due on 08/02/2018.	08/16/2018 12:37:42PM	Assess	Bonnie
---	-----------------------------------	------------------	--	-----------------------	--------	--------

*History Report with Patron History disabled*

### To disable history for a single patron

1. Click **Patrons** from Atrium's **Menu Bar**.
2. Under **Patron**, click **Edit**.
3. Search for the patron whose history you want to disable.
4. Click to select the **Disable History** check box.
5. Click **Save**. This patron's history will be obfuscated overnight.

Has Barcode Been Printed?  
 Can Publish Bookbags As Book Lists  
 Referred To Collection Agency  
 **Disable History**

*Add/Edit Patron form*

### To disable history for a group of patrons

1. Click **Patrons** from Atrium's **Menu Bar**.
2. Under **Bulk**, click **Reclassify**.
3. Scan or enter the patron barcodes, or **Filter** to add them.
4. Click the **Change Disable History Option** check box to select it.
5. Click the drop-down button and click again to select **Yes**.
6. Click **Reclassify Patrons**.

Change Disable History Option Yes ▾

*Reclassify Patrons form*

### Allow Patrons to Disable and Clear Patron History in OPAC

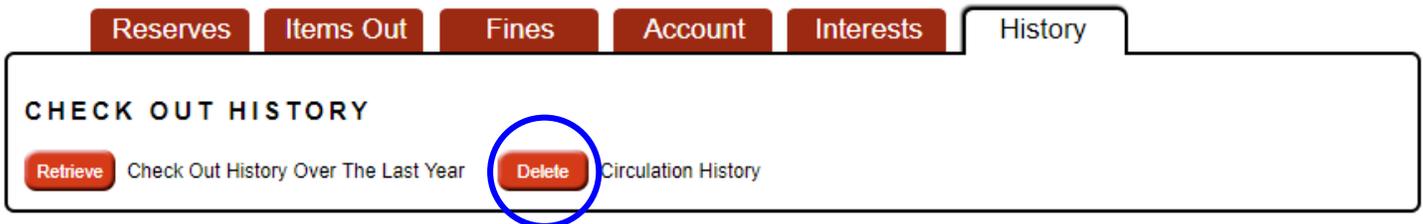
You can also allow patrons to disable history themselves from the **Account** tab in **OPAC** (*Note: My Items must be enabled*).

#### To allow patrons to disable their history in My Items

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **OPAC**.
3. Click **General And Patron Account Settings**.
4. Under *My Items Settings*, click **Yes** next to **Allow Patrons To Disable And Clear Circulation History**.
5. Click **Save**.
6. A **Disable History** radio button option displays on the **Account** tab in My Items.

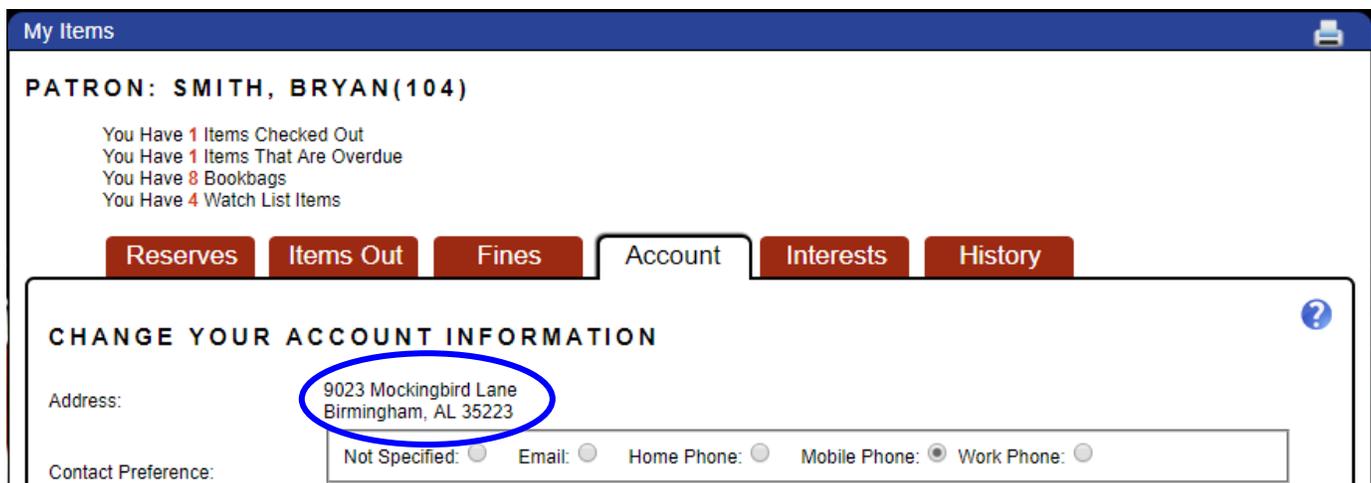
The same setting lets patrons delete their circulation history immediately from the **History** tab in My Items.

When enabled, patrons will see a **Delete** button that removes their circulation history (*titles and other holdings information*) from reports. Any fines associated with their patron records are retained even though the holdings information is hidden.



### Patron Address in My Items

The patron's physical address now displays in the **Account** tab in My Items. While patrons cannot change their address from **OPAC**, they can notify the library if the information is outdated.



## Auto Reserve Watch List Items

If patrons have set up Watch List terms (*requires a saved email address*), they can now elect to automatically place a hold on newly added holdings that match a term, such as a favorite author. To make the automatic reservation process fair, the system randomly assigns the reserve order to patrons with the same Watch List term.

### To enable the Auto Reserve Watch List Items setting

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **OPAC**.
3. Click **General And Patron Account Settings**.
4. Under *Renew/Reserve/Bookings Settings*, click **Yes** next to **Allow Patrons To Auto Reserve Watch List Items**.
5. Click **Save**.
6. Patrons will receive an email for any successful reservations matching their Watch List terms.

### To use the Auto Reserve Watch List Items feature as a patron

1. In OPAC, log on to your My Items account.
2. Click the **Interests** tab.
3. Click to expand the **My Watch Lists** section.
4. Next to the term you want to reserve, click **Edit** in the **Action** column.
5. Click the **Yes** radio button for the **Automatically reserve new items that match this term**.
6. Click **Save**.

**MY WATCH LISTS - CLICK TO HIDE**

---

**YOUR WATCH LIST TERMS** ?

Type	Term	Action
Series Title	--For dummies	Edit   Delete
Author	Grisham, John	Edit   Delete
Author	Rondeau, Amanda	Edit   Delete
Author	Bowling, J. K.	Edit   Delete

Add New Watch List Term

**Watch Lists**

**Add/Edit Watch List Term**

Author Grisham, John

Automatically reserve new items that match this term: Yes:  No:  Save

### Create and Edit Watch Lists

You can now create or edit Watch Lists from the librarian side of Atrium for patrons who don't want to log onto My Items in **OPAC** or just need extra help. Setting this up for patrons will provide notifications about newly added items with subjects, authors, or series they are interested in.

**Add/Edit Watch List Terms**

Patron Name: [Nesbitt, Virginia](#)  
Barcode: 401643  
Patron Report Class: Adults  
Patron Circulation Class: Adults

Author

Automatically reserve new items that match this term: Yes:  No:

**Watch List Terms For This Patron**

Type	Term	Action
Subject	<a href="#">Cookbooks</a>	<a href="#">Edit</a>   <a href="#">Delete</a>
Author	<a href="#">Grisham, John</a>	<a href="#">Edit</a>   <a href="#">Delete</a>
Series Title	<a href="#">Kinsey Millhone Mysteries</a>	<a href="#">Edit</a>   <a href="#">Delete</a>
Subject	<a href="#">Philosophical Counselling</a>	<a href="#">Edit</a>   <a href="#">Delete</a>
Subject	<a href="#">Police-England-Fiction</a>	<a href="#">Edit</a>   <a href="#">Delete</a>
Subject	<a href="#">Politics</a>	<a href="#">Edit</a>   <a href="#">Delete</a>
Subject	<a href="#">Sustainable living</a>	<a href="#">Edit</a>   <a href="#">Delete</a>

#### To add a Watch List Term for a Patron

1. Click **Patrons** from Atrium's **Menu Bar**.
2. Under **Patron**, click **Review**.
3. Search for the patron.
4. On the **Patron Information** form, click [Watch List Terms For This Patron](#).
5. Use the drop-down list to select whether this term is an Author, Series Title, or Subject.
6. Enter the term in the field.
7. Use the radio button to select if new items matching this term should be automatically reserved for the patron (refer to page 19 for more information about this feature).
8. Click **Add**.
9. To modify or remove an existing term, click the appropriate [link](#) in the **Action** column.

### Patron Pictures in Patron Lookup

If you have patron pictures imported from a student database or have manually added them to records, you can choose to display these pictures in lookup results when searching. This is helpful in quickly differentiating between patrons with the same first or last name without having to check other details.

**Patron Lookup Results**

	<p>1. <b>Smith, Bryan</b> Barcode: 104 Birth Date: 04/26/2009</p>	<p>Patron Report Class: 3rd Grade Patron Circulation Class: Student Grade Level: 3</p>
	<p>2. <b>Smith, Randy</b> Barcode: 26 Birth Date: 04/15/1967</p>	<p>Patron Report Class: Faculty Patron Circulation Class: Staff Grade Level: FAC</p>

*Patron Lookup Results (Distributed)*

**Patron Lookup Results**

	<p>1. <b>Rowe, Ana</b> Barcode: 401593 Address: 56 Valley Lane Birth Date: 04/19/1965</p>	<p>Patron Report Class: Adults Patron Circulation Class: Adults Patron Branch: East Branch</p>
	<p>2. <b>Rowe, Michael "Greggory"</b> Barcode: 530 Address: 101 Happy Valley Road Birth Date: 05/04/1963</p>	<p>Patron Report Class: Seniors Patron Circulation Class: Adults Patron Branch: Main Library</p>

*Patron Lookup Results (Centralized)*

#### To enable patron pictures in lookup

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **Patrons**.
3. Click **Patron Settings**.
4. Next to **Display Patron Pictures In Librarian Search Results**, click **Yes**.
5. Click **Save**.

#### Delete Patron Records with Fines

If you need to delete patrons in bulk, there is now an option to waive fines attached to patron records so that you can delete a group of patrons without having to edit each patron record one-by-one and remove fines.

1. Click **Patrons** from Atrium's **Menu Bar**.
2. Under **Bulk**, click **Delete Patrons**.
3. Scan or enter the patron barcodes, or **Filter** to locate patrons and queue them.
4. Next to the **If Patrons Have Fines** option, click the drop-down button, and click again to select **Waive Fines**.
5. Click **Delete Queued Records**. Any patrons with fines attached to their records will be deleted along with the other patron records in the queue.

Delete Public Book Lists For Deleted Patron Records

If Patrons Have Fines: Keep Record ▼

Keep Record  
Waive Fines

## Circulation Features

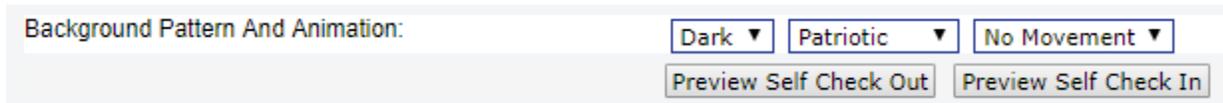
Several updates have been added to make Self Check more engaging for younger patrons and to increase efficiency for your staff.

### Self Check Station Backgrounds and Preview *(requires license)*

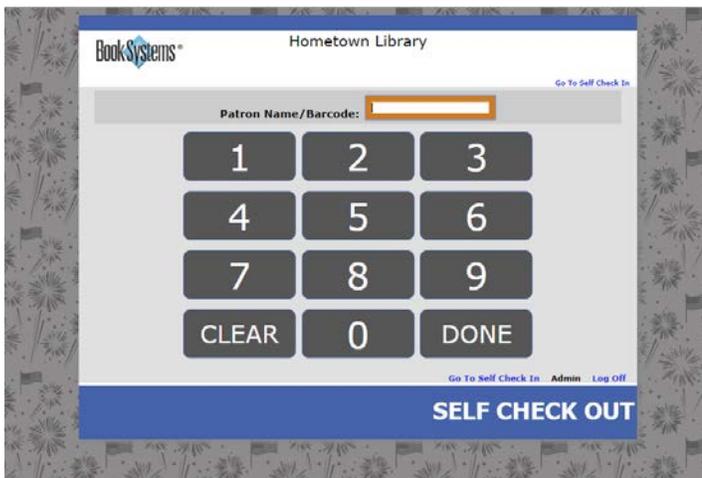
Easily select a background pattern and shading (**Light** or **Dark**) to customize your Self Check interface.

#### To select a Self Check background pattern and animation

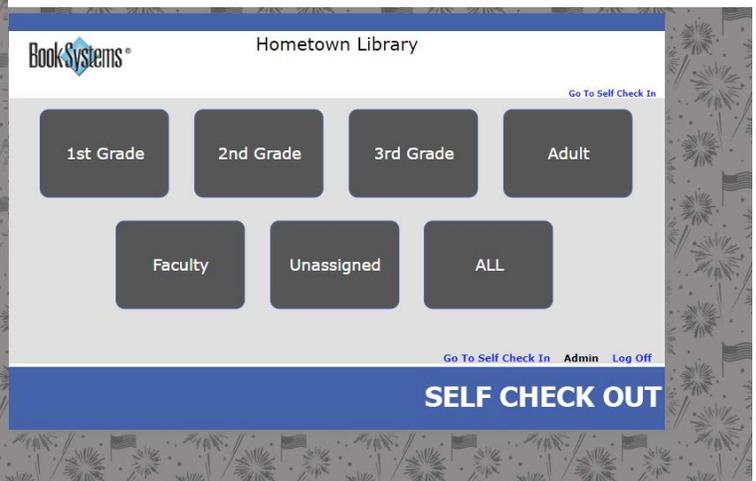
1. Click **Administration** from Atrium's **Menu Bar**, and then click **Circulation**.
2. Click **Circulation Settings**.
3. Under *Self Check Station Settings*, use the drop-down list to the left to select whether the background pattern should be **Light** or **Dark**.
4. Use the drop-down list in the middle to select your Self Check background pattern.
5. If needed, use the drop-down list to the right to select a motion for the pattern.
6. To see your choices use the **Preview** buttons for **Self Check Out** and **Self Check In**.



7. When you are satisfied with your selections, click **Save**.



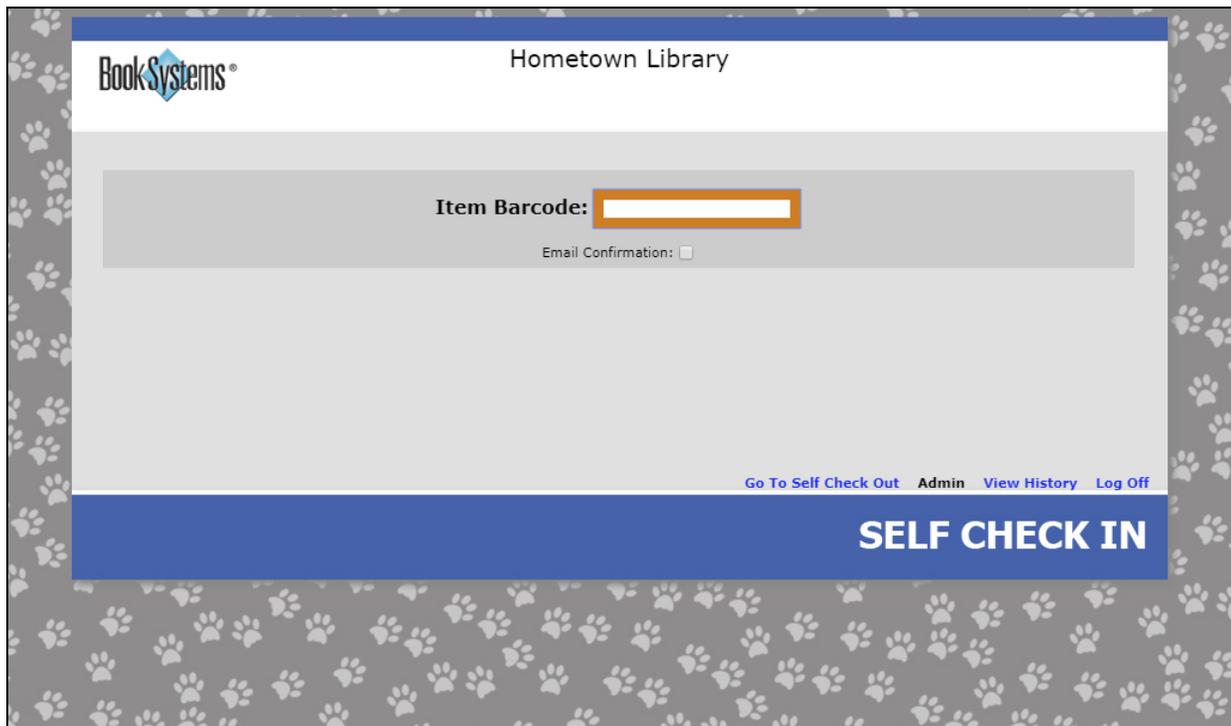
*Self Check Out with Scan Barcode*



*Self Check Out with Choose By Class*

### Self Check Field Borders *(requires license)*

If you want your patrons to be able to tell at a glance whether the barcode field for scanning is active (orange) or inactive (blue), you can increase the border width of the field using a new circulation setting. These color changes take place in most browsers.



#### To enable the setting

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **Circulation**.
3. Click **Circulation Settings**.
4. Under *Self Check Station Settings*, enter a new value in pixels to increase the **Field Border Width**.
5. Click **Save**.
6. To see your changes, click the **Preview Self Check Out** or **Preview Self Check In** button under **Background Pattern And Animation**.

## What's New in Atrium 12.0

### Birthday Song on Self Check Stations *(requires license)*

Atrium has added birthday options to Self Check. If you enable **Pop-Up Birthday Notifications**, a pop-up celebrates patrons who check items in/out on their birthdate.

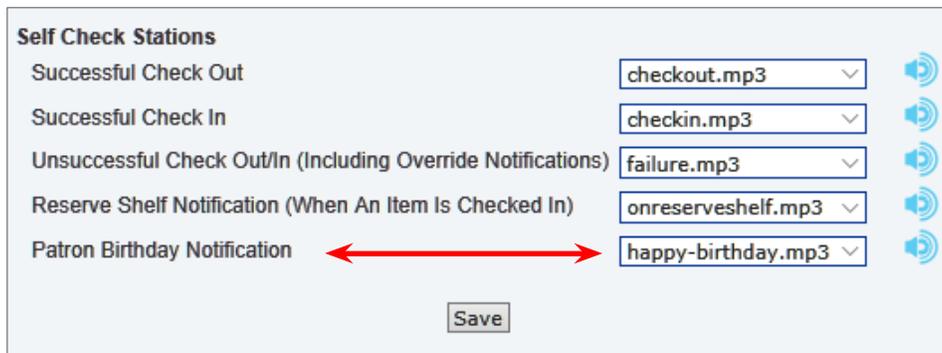
#### To enable Pop-Up Birthday Notifications

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **Circulation**.
3. Click **Circulation Settings**.
4. Click **Yes** next to **Pop-Up Birthday Notifications**.
5. Click **Save**.



#### To play a sound for birthday notifications

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **Library**.
3. Click **Custom Sounds**.
4. Under *Self Check Stations*, click the drop-down button next to **Patron Birthday Notification**, and click again to select **happy-birthday.mp3** or another sound.
5. Click **Save**.



## Physical Location and Custom Item Status on Check In

When you check in an item, the physical location displays. This is helpful if an item needs to be reshelfed in a special area or display shelf. The **Display Physical Location Where Applicable** setting must be enabled for this to work.

**Successes**

<b>Title:</b> <a href="#">The Guernsey Literary and Potato Peel Pie Society</a>	<b>Checked Out To:</b> <a href="#">White, Linda (Check Out)</a>
<b>Barcode:</b> 00007150	<b>Patron Circulation Class:</b> Adults
<b>Author:</b> Shaffer, Mary Ann	<b>Patron Report Class:</b> Adults
<b>Was Due On:</b> 04/24/2018	<b>Cost:</b> \$29.99
	<b>Physical Location:</b> Display 1 - Front Entrance, Main Desk ←
	<a href="#">Reclassify</a>   <a href="#">Transfer</a>

### To enable the Physical Location setting

1. Click **Administration** from Atrium's **Menu Bar**, and then click **Catalog**.
2. Click **Catalog Settings**.
3. Next to **Display Physical Location Where Applicable**, click **Yes**.
4. Click **Save**.

If you have set the option to remove **Custom Item Status** on items when they are checked in, a warning message now tells you what the status was before it was removed on check in.

**Warnings**

**WARNING: This item's custom item status has been reinstated to the normal circulation status.**

**Successes**

<b>Title:</b> <a href="#">Red sparrow</a>	<b>Checked Out To:</b> <a href="#">Smith, Damon (Check Out)</a>
<b>Barcode:</b> 00007149	<b>Patron Circulation Class:</b> Adults
<b>Author:</b> Matthews, Jason	<b>Patron Report Class:</b> Adults
<b>Was Due On:</b> 04/24/2018	<b>Cost:</b> \$49.99
	<b>Previous Custom Item Status:</b> In Transit ←
	<b>Physical Location:</b> Main Stacks
	<a href="#">Reclassify</a>   <a href="#">Transfer</a>

### To enable the Automatically Remove Custom Item Status On Check In setting

1. Click **Administration** from Atrium's **Menu Bar**, and then click **Circulation**.
2. Click **Circulation Settings**.
3. Next to **Automatically Remove Custom Item Status On Check In**, click **Yes**.
4. Click **Save**.

### Refresh Patron On Check Out Setting

Using the Circulation Menu Check Out (single and batch), the previous version of Atrium was changed to automatically move your cursor to the **New Patron Name / Barcode** field after printing a receipt so the current patron's information stayed on the screen in case of paper jams or other extenuating circumstances.



If you would prefer to automatically open the **Patron Lookup** form to find the next patron after printing, enable the **Open Patron Lookup After Printing Circulation Receipt** setting.

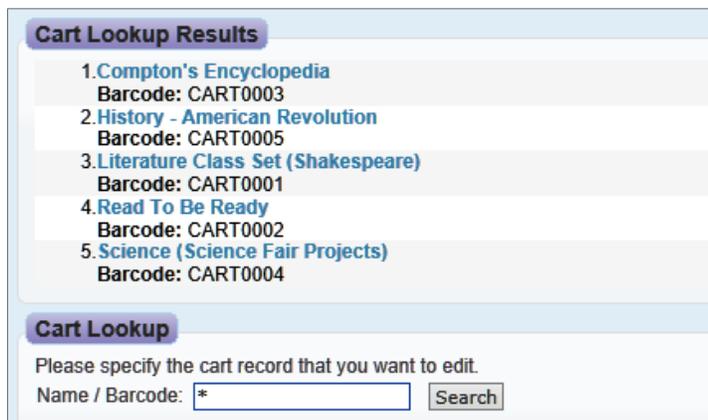
#### To enable the setting

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **Circulation**.
3. Click **Circulation Settings**.
4. Under *Receipt Settings*, click **Yes** next to **Open Patron Lookup After Printing Circulation Receipt**.
5. Click **Save**.
6. After completing a check out transaction, the patron lookup form will open so you can look for the next patron.

### Cart Lookup in Left Column

The ability to group holdings that belong to a physical cart or other type of container was added to a recent version of Atrium. Now you can quickly search for a cart using the **Left Column**.

Type a cart name or cart barcode, or enter an asterisk (\*), and click **Search** to see a complete list of cart records.



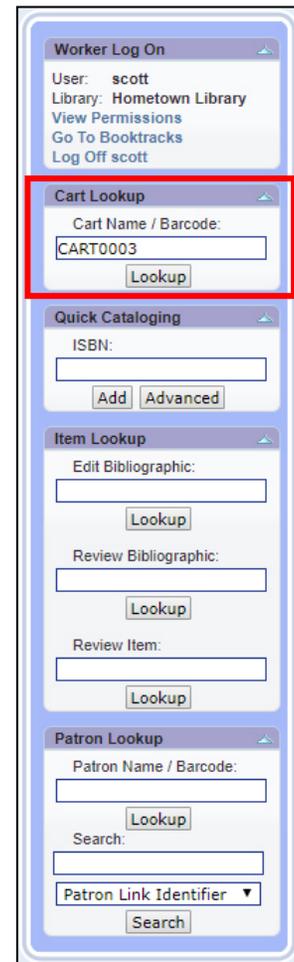
**Cart Lookup Results**

1. **Compton's Encyclopedia**  
Barcode: CART0003
2. **History - American Revolution**  
Barcode: CART0005
3. **Literature Class Set (Shakespeare)**  
Barcode: CART0001
4. **Read To Be Ready**  
Barcode: CART0002
5. **Science (Science Fair Projects)**  
Barcode: CART0004

**Cart Lookup**

Please specify the cart record that you want to edit.

Name / Barcode: \*



Worker Log On  
User: scott  
Library: Hometown Library  
View Permissions  
Go To Booktracks  
Log Off scott

**Cart Lookup**  
Cart Name / Barcode:  
CART0003

Quick Cataloging  
ISBN:

Item Lookup  
Edit Bibliographic:

Review Bibliographic:

Review Item:

Patron Lookup  
Patron Name / Barcode:

Search:

Patron Link Identifier ▼

## Report Features

### Borders on Printable Reports

If you prefer to view lines on printed reports for easier reading, you can now add column and row borders to create a complete grid. These are two distinct settings, so you can choose to show vertical borders, horizontal borders, or both. Some unique reports already contained borders by default; those are not affected.

Line #	Call Number	Author's Name	Title	Holdings Barcode
1			The 100 most influential inventors of all time	EB000220
2			The 100 most influential musicians of all time	EB000223
3			The 100 most influential painters & sculptors of the Renaissance	EB000221
4			The 100 most influential philosophers of all time	EB000224
5			The 100 most influential scientists of all time	EB000219

### To enable the settings

1. Click **Administration** from Atrium's **Menu Bar**, and then click **Library**.
2. Click **Worker Settings**.
3. Under *Report Settings*, click **Yes** next to **Display Column Borders For Printable Reports** to show vertical lines.
4. Click **Yes** next to **Display Row Borders For Printable Reports** to show horizontal lines.
5. Click **Save**.

### Export Options

If you need to omit column headers, line numbers, or both from your report data during export, you can now easily do that from your generated report. Simply click **Export Options** on the generated report, and deselect options as needed. Click **OK**. Then export your report as a CSV or Text file as usual.

**Accession List**

Report Results For: Holdings Status equals "Active"  
13950 Result(s) Found.  
Displaying Results 1 - 10

[Edit This Report](#)
[Email Report](#)
[Printable Version](#)
[Export MARC Records](#)
[Export Report As CSV](#)
[Export Report As Text](#)
[Export Options](#)

**Export Options** ✕

Use Column Headers  
 Use Line Numbers

Atrium remembers your preferences.

## What's New in Atrium 12.0

### Used and Unused Barcode Report Ranges

On barcode reports, the number of barcodes in each range displays in parentheses next to the range so you can easily fill in gaps in your database when adding a batch of patrons or items. In the example shown below, a librarian who is ordering up to 51 new items from a vendor could give them the barcode range below so all the new items would be in sequence and fill in that gap in the database.

#### To view barcode reports

1. Click **Reports** from Atrium's **Menu Bar**.
2. Under **Administration**, click **Standard/Saved**.
3. Click a **name** to open one of the following reports:

- [Unused Holdings Barcodes](#)
- [Unused Patron Barcodes](#)
- [Used Holdings Barcodes](#)
- [Used Patron Barcodes](#)

34	00007070 - 00007073 (4)
35	00007153 - 00007643 (491)
36	00007645 - 00007692 (48)
37	00007694 - 00007716 (23)
38	00007718 - 00007813 (96)
39	00007815 - 00007865 (51)
40	00007867 - 00008188 (322)
41	00008191 - 00008271 (81)
42	00008274 - 00008396 (123)

*Unused Holdings Barcodes Reports*

### New Filtering Options

#### Last Modified Date

If you need to see what records were modified on, before, or after a specified date, you can now use the data type for **Last Modified Date** to narrow your results. For instance, if you were out on vacation for a week and want to see which items were edited during your absence, you can search for *Last Modified Date is within last 7 days*.

**Create Filter**

Physical Location Equals

Item Report Class Equals

Barcode Labels

Spine And Pocket Labels

Holdings Status

Call Number

Holdings Barcode

**Last Modified Date**

## What's New in Atrium 12.0

### Statistical Reports Date Filter

Statistical reports now automatically default the Start Date to the first day of the current month and the End Date to the current date. You can still adjust the dates as needed and generate Statistical reports based on your required date range.

**Items Added And Deleted By Age Group : 05/01/2018 to 05/16/2018**

Filter Criteria: Start Date:  

End Date:  

### Exactly Matches Text Qualifier

If you need to search for an item based on letters and/or numbers regardless of spaces and punctuation, such as a home phone number that might be formatted differently in different patron records for the same family, you can use the *exactly matches text* qualifier in Advanced Filtering.

**Create Filter**

Data Type:  Qualifier:  Search Terms:

**Patron List**

Report Results For: Home Phone exactly matches text "5555551234"  
 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 Barcode	Patron Name	Patron Circulation Class	Home Phone
<a href="#">Review</a>	1	402632	Johnson, Miriam "Mimi"	Adults	555-555-1234
<a href="#">Review</a>	2	400780	Powell, Sarah	Young Adults	5555551234
<a href="#">Review</a>	3	401720	Smith, Damon	Adults	(555) 555-1234
<a href="#">Review</a>	4	401375	Smith, Janice	Child	555 555-1234
<a href="#">Review</a>	5	408008	Smith, Joe	Adults	5555551234

[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:

## Alternative Payment Types

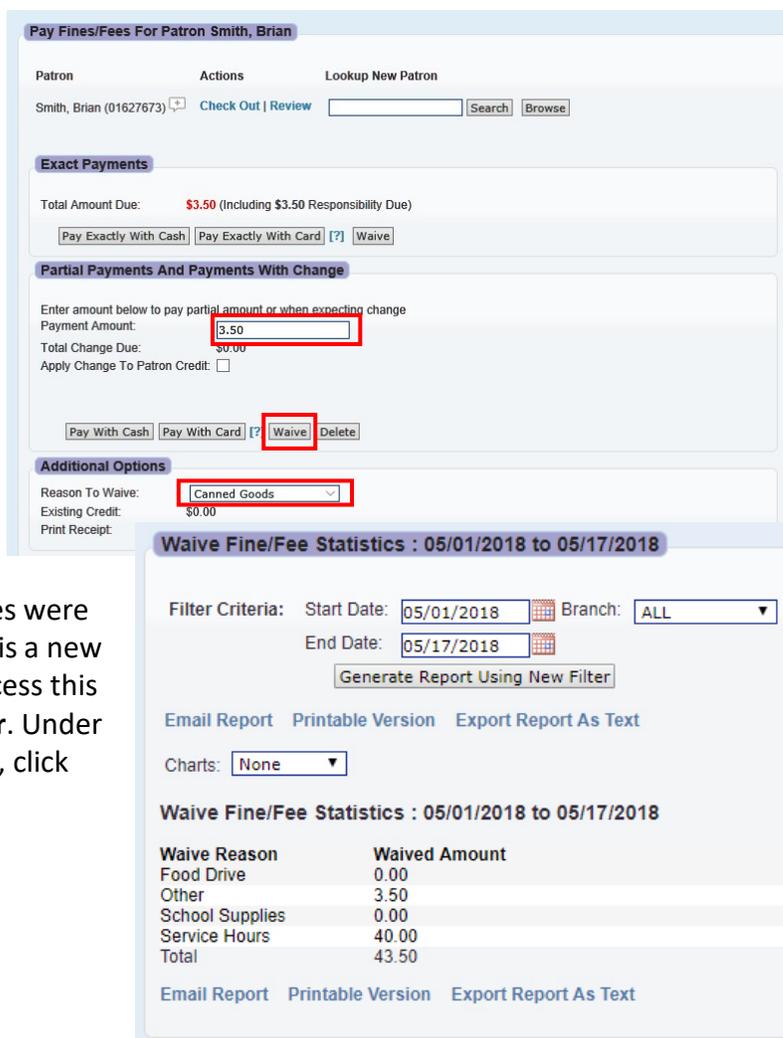
If you allow patrons to exchange canned goods, volunteer hours, or the like in lieu of fines, there is now a way to track that in Atrium. Simply set up a **Payment Type** for your preferred currency, and select this option when waiving fines on the **Pay Fines/Fees** form.

### To add an alternative payment type

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **Circulation**.
3. Click **Payment Types**.
4. Click **Add New Payment Type**.
5. Enter a name such as **Canned Goods**.
6. Enter a description such as **Canned Food Items**.
7. Click **Save**.

### To waive a fine with an alternative payment type

1. Click **Circulation** from Atrium's **Menu Bar**.
2. Under **Fines**, click **Pay**.
3. Look up the patron who is exchanging goods or services for fine forgiveness.
4. Enter the amount to be waived in the Payment Amount field. Under **Additional Options**, click the drop-down list button next to **Reason To Waive** and **click again** to select a payment type from the list.
5. Click **Waive**.



**Pay Fines/Fees For Patron Smith, Brian**

Patron: Smith, Brian (01627673) | Actions: Check Out | Review | Lookup New Patron

**Exact Payments**

Total Amount Due: \$3.50 (Including \$3.50 Responsibility Due)

Buttons: Pay Exactly With Cash | Pay Exactly With Card | Waive

**Partial Payments And Payments With Change**

Enter amount below to pay partial amount or when expecting change

Payment Amount: 3.50

Total Change Due: \$0.00

Apply Change To Patron Credit:

Buttons: Pay With Cash | Pay With Card | Waive | Delete

**Additional Options**

Reason To Waive: Canned Goods

Existing Credit: \$0.00

Print Receipt:

---

**Waive Fine/Fee Statistics : 05/01/2018 to 05/17/2018**

Filter Criteria: Start Date: 05/01/2018 | Branch: ALL | End Date: 05/17/2018

Buttons: Generate Report Using New Filter

Options: Email Report | Printable Version | Export Report As Text

Charts: None

Waive Reason	Waived Amount
Food Drive	0.00
Other	3.50
School Supplies	0.00
Service Hours	40.00
<b>Total</b>	<b>43.50</b>

Buttons: Email Report | Printable Version | Export Report As Text

To see statistics about how many fines and fees were waived with alternative payment types, there is a new report called **Waive Fine/Fee Statistics**. To access this report, click **Reports** from Atrium's **Menu Bar**. Under **Administration**, click **Statistical Reports**. Then, click **Waive Fine/Fee Statistics**.

## Apps

### Book Systems Pay

You can now accept credit card payments at the circulation desk using a mobile device, plug-in card reader, and the Book Systems Pay™ app for supported Apple® and Android™ devices.



**Note:** The library must have a PayPal™ or Square™ account in order to use this feature.

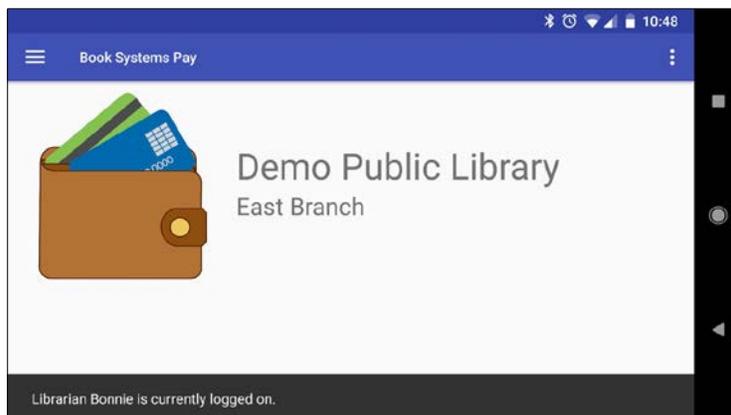


### To enable the Pay With Card feature in Atrium

1. Click **Administration** from Atrium's **Menu Bar**
2. Click **Circulation**, and then click **Circulation Settings**.
3. Next to **Allow Paying With Cards On Librarian Side**, click **Yes**.
4. Click **Save**.

### To set up the Book Systems Pay app

1. Download the appropriate app from the App Store<sup>SM</sup> or Google Play<sup>TM</sup> for you mobile device.
2. Open the Book Systems Pay app. Allow location detection or search for your library in the library locator and select it.
3. Log on with an Atrium worker username and password.
4. Choose either Square or PayPal as your payment provider. If you select Square, you will be prompted to download the Square Point of Sale™ app to allow you to complete transactions. You must sign into the Square app with the library's credentials. Then, return to the Book Systems Pay app.



*Book Systems Pay for Android*

## What's New in Atrium 12.0

### Accepting card payments

1. Initiate a fine payment in Atrium on the **Pay Fines/Fees** form by using the exact payment option or by entering an amount and clicking the **Pay With Card** button. A pop-up displays telling you that Atrium is syncing to Book Systems Pay.

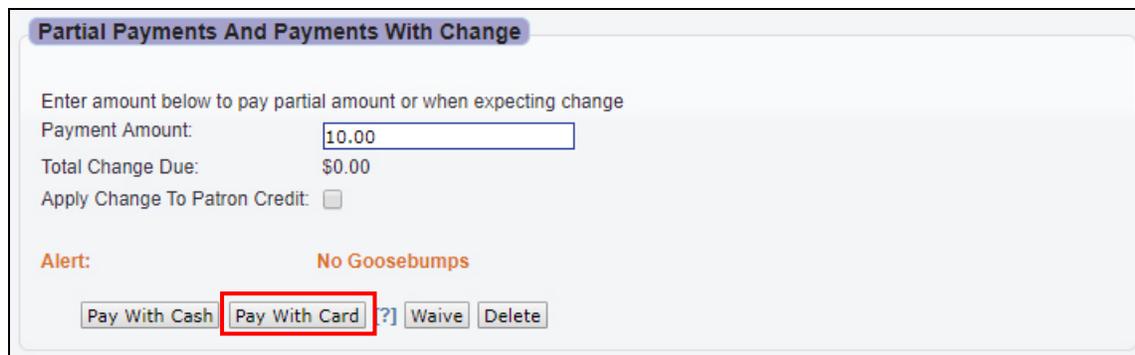


**Pay Fines/Fees For Patron Smith, Bryan**

Patron: Smith, Bryan (106) MSG Actions: Check Out | Review Lookup New Patron

Total Amount Due: **\$20.00**

Buttons: Pay Exactly With Cash **Pay Exactly With Card** [?] Waive



**Partial Payments And Payments With Change**

Enter amount below to pay partial amount or when expecting change

Payment Amount: 10.00

Total Change Due: \$0.00

Apply Change To Patron Credit:

Alert: **No Goosebumps**

Buttons: Pay With Cash **Pay With Card** [?] Waive Delete

2. Open the Book Systems Pay app on your Apple or Android device. The payment should be ready to process. Book Systems Pay will show you a Square or PayPal interface, depending on your selected settings.
 

**Note:** You may be prompted to plug in the card reader if you have not already. You may also need to allow the “audio” permission so that the device can access the audio port where the card reader is plugged in.
3. Swipe the card. Have the patron sign on the device screen.
4. The transaction is complete and the fine will be registered as paid in Atrium.
5. Use receipt options in the app to provide the patron with a receipt via email or text, if applicable.

## What's New in Atrium 12.0

### Reporting

Enhancements were made to existing reports to provide information concerning electronic payments.

#### Cash Drawer Statistics Report

1. Click **Reports** from Atrium's **Menu Bar**.
2. Under **Administration**, click **Statistical Reports**.
3. Click **Cash Drawer Statistics**.
4. Click the **Separate Cash/Electronic** radio button to divide statistics out to see the amounts your patrons are paying electronically (with Book Systems Pay and/or in **OPAC** using PayPal if you have that setting enabled or).

Item Report Class	Cash Payments Received	Electronic Payments Received	Waived	Refunded	Currently Owed
000 - 099	0.00	3.00	0.00	0.00	84.73
100 - 199	10.00	6.99	12.50	66.99	112.50
200 - 299	0.00	23.00	5.00	0.00	89.50

### History Report

1. Click **Administration** from Atrium's **Menu Bar**.
2. Click **Reports**.
3. Under **Administration**, click **History**.
4. Use the Easy Filter to limit the report. For example, you may adjust the date range or limit the **History Action** so you don't get unrelated information.

Line #	Title	Author's Name	Holdings Barcode	Patron Name	History Action	Comment	Date of Action	History Action	Worker Name
1	India	Italia, Bob,	10224	Smith, Bryan	Fine Paid: \$0.60	Reason For Fine: Overdue. Checked in on 04/03/2018 11:06:00AM. Was due on 03/26/2018.	04/03/2018 11:06:21AM	Pay	Scott
2	German Shepherds	Kallen, Stuart A.,	10251	Smith, Bryan	Fine Paid: \$1.90	Reason For Fine: Overdue. Checked in on 04/03/2018 11:06:03AM. Was due on 03/07/2018.	04/03/2018 11:06:21AM	Pay	Scott
3	Italy	Italia, Bob,	10225	Smith, Bryan	Fine Paid: \$0.50	Reason For Fine: Overdue. Checked in on 04/03/2018 11:06:13AM. Was due on 03/27/2018.	04/03/2018 11:06:21AM	Pay	Scott

# Atrium®

## What's New in Atrium 12.0

### Librista for Android

Check out the latest free mobile OPAC app for Atrium on Android devices. You and your patrons will love this feature-packed library tool. Patrons can download Librista from either the App Store or Google Play.



App Features

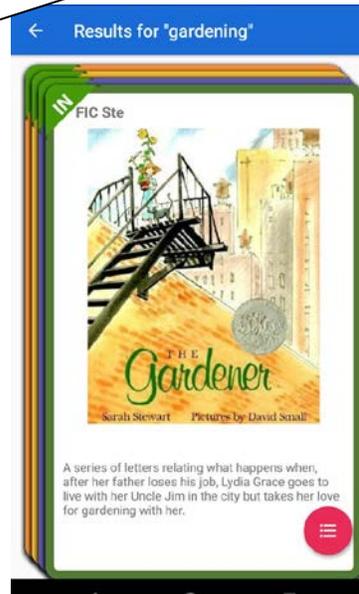
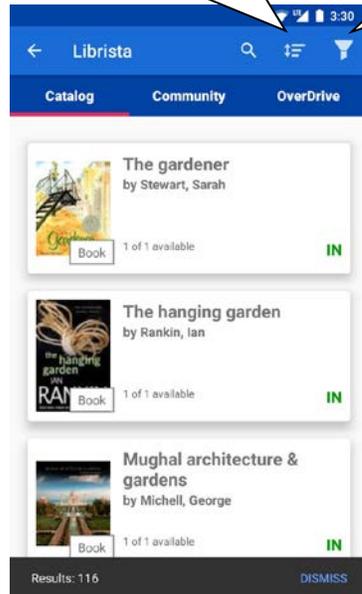
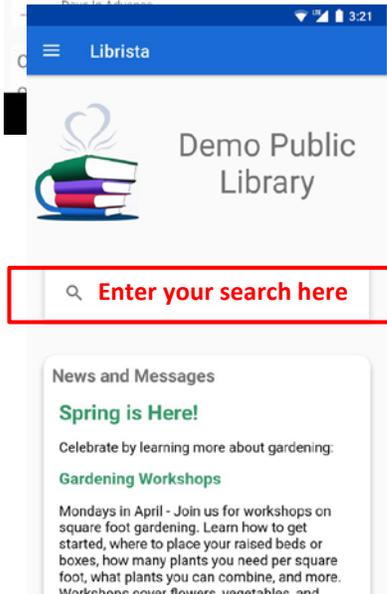
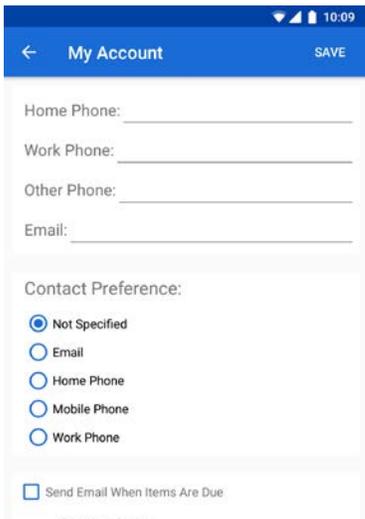
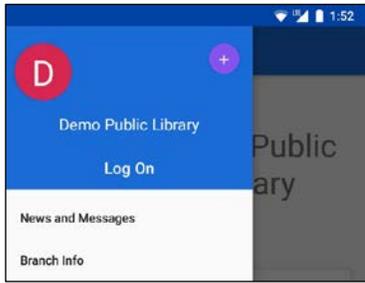
#### Features:

- Find libraries closest to you
- Easily switch between libraries and users
- Create bookbags of items you enjoy
- Manage your personal account
- Reserve items
- Keep up with Community posts
- And much more!

#### Supported devices:

- Android Smartphone
- Android Tablet
- Android PC

As the librarian, you can add a widget to your **OPAC** to promote the app (see pg. 13), but you don't need to do any additional setup. Your **OPAC** settings for account permissions, reserves, etc. carry over from Atrium.



# Atrium®

## What's New in Atrium 12.0

### Resources

The new features covered in this guide are also documented in Atrium's online Help files.

Click **Help** from the **Menu Bar** at any time to access a context-sensitive topic with information about the form you are currently using.

Click  from any settings form for detailed descriptions of all available settings.



Click  from the **Toolbar** to open the **Downloads** form; or you can click **Administration** from Atrium's **Menu Bar**, and then click **Library**. Click **Downloads** to open the form to view guides and handbooks on various features.

For more information about downloading and using Book Systems apps, read the **Atrium Mobile Apps Guide**, available on the **Downloads** form in Atrium or on the Book Systems website at <https://www.booksys.com/mobile-apps>.

If you have further questions that this document or our online Help files do not answer, please call Book Systems' Technical Support Staff at **(888) 289-1216** or send an email to [support@booksys.com](mailto:support@booksys.com). Business hours are Monday through Friday, 7 am – 7 pm Central Standard Time.

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