

## Introduction

Book Systems, Inc. provides the **Atrium Mobile Interface™ (AMI)** application for Apple® iPhone®, iPod touch®, iPad®, and iPad mini™ devices and Android™ devices so that librarians can continue to circulate items even if they are away from the circulation desk.

The app allows you to perform basic transactions, including checking in items you find in the hallway or left in the library, checking out items to patrons, and looking up the status of patrons and items.

This document lists the requirements for supported Apple and Android devices to work correctly with **AMI** and provides steps for installing and using the app.

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## AMI for Apple devices

Review the following requirements to see if your device is supported:

- iPhone 4S or higher
- iPod touch 5th generation or higher
- iPad 2 or higher
- iPad mini 1st generation or higher
- Most current version of Atrium
- Internet connection

Open the **App Store<sup>SM</sup>** on your device, and search for **Atrium Mobile Interface**.



Tap the app from the results to open a page with images, install options, overview information, requirements, etc. Tap **GET** and then **INSTALL**. The App Store automatically detects which type of device you are using and installs the appropriate version of the app.



You will be prompted to sign in to your **iTunes Store®** account (which must have associated credit card information even though this particular app is free). An icon  displays while the app is downloaded and installed to your device. When it is finished, tap **OPEN**.

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## AMI for Android devices

Review the following requirements to see if your device is compatible:

- Android version 4.0.3 or higher
- Most current version of Atrium
- Internet connection
- Built-in camera or scanner with auto-focus

Open the **Google Play™** store app. Search for **Atrium Mobile Interface**, and then tap the app from the results to view a page with images from the app, install options, overview information, requirements, etc.



Tap **INSTALL**. You may be prompted to give the app permission to access certain areas of your device; tap **ACCEPT**. You will see a **Downloading...** and **Installing...** message; when the process is finished, tap **OPEN**.

## Configuration

To use **AMI**, you need to configure settings for the app to communicate with your Atrium database. If you plan to use a Bluetooth® scanner to capture item and patron barcodes, you also need to be sure it is set up to work with your device. Both tasks are covered in the next sections.

## AMI Settings

When you initially open the app using any device, a message displays letting you know you cannot log on until you configure settings. Tap the **Enter Server Settings** or **Server Settings** button (depending on your device), and then configure your options. Some information you need displays in your Atrium URL (pictured below):



- **Server:** – Enter the main DNS or IP address for your Atrium. This is the first part of the address between the double slashes and the first single slash (highlighted in yellow in the image above).
- **Port:** – Enter or change the number as needed; depending on your device and connection type, you may see 80 or 443 (SSL).
- **Library:** – Enter the prefix for your library URL. This is the part of the address after “/libs/” (highlighted in blue in the image above).
- **SSL** – This option allows you to securely connect to your server. It may already be enabled based on your configuration, but if needed, you can also manually enable this setting.
- **Bluetooth** – This setting is disabled by default. If you will use a Bluetooth scanner, enable this by tapping the option or selecting it in the left pane and then tapping the check box (depending on your device). When enabled, **AMI** will automatically focus on each field, allowing you to quickly scan barcodes without additional steps.



You can tap your device’s hide/dismiss option at any time to close the keyboard.

- **Play Sounds** – If you want to hear sounds for successful/unsuccessful circulation transactions, either tap to enable the option or select it in the left pane and then tap the check box (based on your device).

When you are finished, tap the device’s go back button, and then do the following to log on:

- Enter your username and password in the first two fields. This is the same information you use to log on to the administrative side of Atrium.
-  To log on to **AMI**, your worker record must have the following permissions enabled: **Log On** and **Upload Data And Sync From Supplemental Tools**. You should also have the **Check In**, **Check Out**, and **Override Circulation Rules** permissions as needed to perform those specific tasks.
- Tap **Lookup Location** to set your location. If you have a **Centralized** database, a list of Branches displays. Tap the location where you need to log on.
- If needed, tap **Log On**.

## Bluetooth Scanner

The Bluetooth capability allows you to use a scanner to input barcodes for lookup and circulation. To use this feature, enable Bluetooth on the device where **AMI** is installed, and pair it with your scanner. If your Bluetooth scanner does not automatically display as an available device for pairing, you may have to scan a barcode to make it discoverable, tap a scan option on your mobile device to find available devices, or use other options depending on your particular situation. Refer to your scanner's instructions to set this up.

 If you do not have a Bluetooth scanner, you can also scan barcodes using your device's built-in camera.

## AMI Features

Once you have settings configured for the app on your device, you can begin circulating. This document briefly covers the features available in **AMI**, including check in, check out, and item and patron review. When using **AMI** from an iPhone, iPod touch, or Android device, you have access to streamlined views, making it quick and simple to perform tasks. When using **AMI** from an iPad or iPad mini, you will see data-rich views that give you important information and alerts about your patrons and items.

 This guide documents and illustrates features for using AMI with the latest version of Atrium; if you have not upgraded, you will see differences depending on your current version.

## AMI for iPhone, iPod touch, or Android

When using an iPhone, iPod touch, or Android device, **AMI** provides quick, easy-to-use features that are streamlined with only the most important information for circulating items. The images here match the way the interface displays on an iPod touch; if you are using another device, your colors may vary, and the task icons may display across the top rather than the bottom.



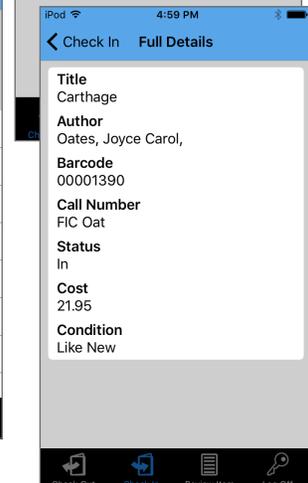
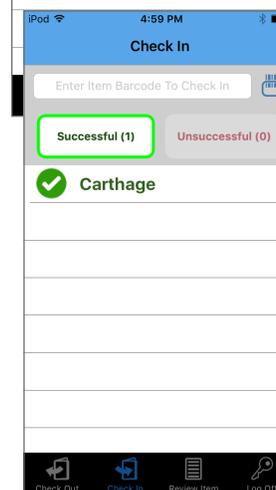
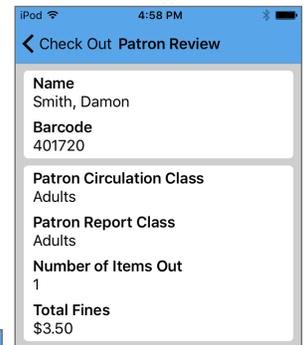
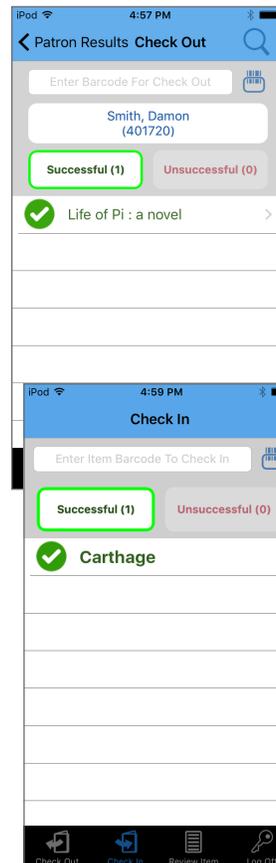
**Check Out** – Quickly look up a patron and then check out an item. This feature allows workers to override circulation errors if needed, based on their permissions. Tap the patron name to view the **Patron Review** page.



**Check In** – Scan or enter an item barcode being returned to the library. After checking in an item, tap the item to view the **Full Details** or **Item Details** (depending on your device).



**Review Item** – Scan or enter an item barcode to open the **Review Details** page, where you can view the Title, Barcode, and Status. If the item is checked out, the Status includes the due date, and you also see the related Patron Name, Patron Barcode, and Patron Report Class.



## AMI for iPad or iPad mini

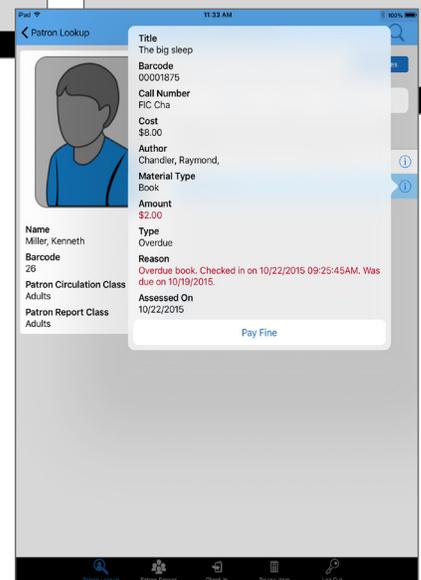
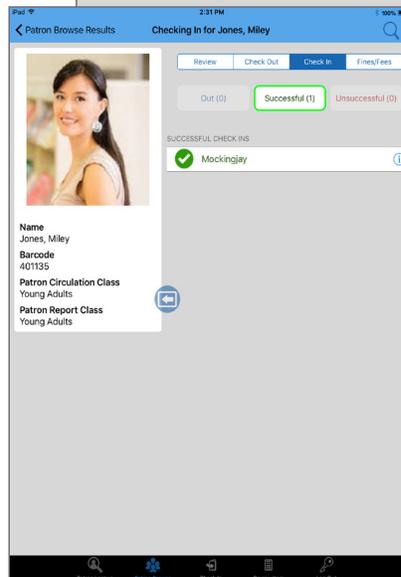
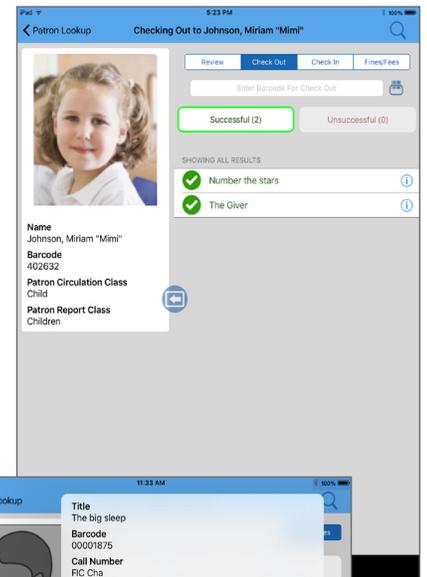
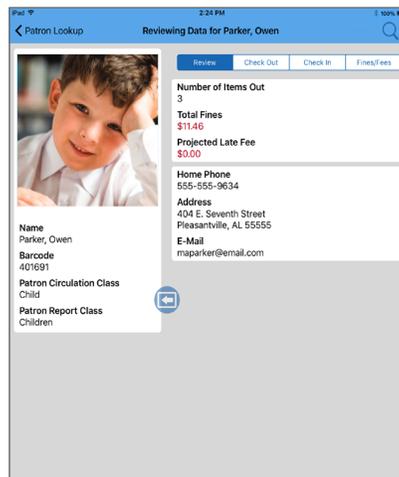
When using an iPad or iPad mini, **AMI** provides the same basic functionality with the addition of fine management, the ability to browse for a patron record if you don't have easy access to his/her barcode, more detailed information in patron and item views, and pictures when reviewing patrons.



**Patron Lookup/Patron Browse** - Tap one of these options across the bottom of the screen to select a method for finding a patron record. The **Patron Lookup** feature allows you to scan/enter a barcode or enter a name. If needed, tap the information icon ⓘ to view a pop-up with patron information or the alert icon ⚠ to view reasons why a patron cannot check out. The **Patron Browse** feature allows you to select a class. Then, you may see a list of names (50 or fewer patrons) or letters A to Z (more than 50 patrons) to drill down to find patrons. To select a patron for circulation, tap the name.

Once you find a patron, the **Reviewing Data** page opens, displaying the patron picture or a generic image (as applicable) in the upper, left-hand corner and basic patron information. You can access all of the options in the bulleted list by tapping the tabs from this one screen:

- The **Review** tab (open by default) lists alerts, circulation/fines status, contact information, reading level, and more.
- The **Check Out** tab allows you to scan/enter item barcodes the patron wants to check out.
- The **Check In** tab lists items the patron already has; simply tap the item to open a pop-up where you can tap **Check In For Patron** or **Renew For Patron**.
- The **Fines/Fees** tab allows you to tap **Pay All** to process all fines/fees at once or select an individual charge and then tap **Pay Fine**.



# Atrium<sup>®</sup>

## Atrium Mobile Interface



**Check In** - Tap this option at the bottom of the screen to open a page where you can scan/enter a barcode for an item that has been returned.



**Review Item** - Tap this option at the bottom of the screen to open a page where you can look up an item and see related details such as Title, Barcode, Call Number, Status, Cost, Check Out Date, and more. Plus, you will see a section with related patron information if the item is checked out.

### Tips!

- During **Patron Browse** or **Patron Lookup**, if you have a long list of results, you can type in the field to search within that list.
- On the **Reviewing Data** page, you can click the left arrow  to hide the patron picture and basic information and have more space to view the **Review**, **Check Out**, **Check In**, and **Fines/Fees** tabs.
- At any time on the **Reviewing Data** page or related tabs, you can tap **New** in the upper, right-hand corner to search for another patron to review.
- To refresh the **Check In** or **Fines/Fees** tab and ensure you are seeing the latest information for the patron, touch and hold at the top of the list and drag down. A progress wheel displays while **AMI** is updating.
- To close an open pop-up or cancel a transaction, simply tap anywhere else on the screen.

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## Product Support

If you have questions about **AMI**, 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 a.m. – 7 p.m. Central Standard Time.

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