Stax Handbook

BookSystems®

Introduction

Stax is a modern app for librarians to perform basic circulation tasks. Whether you are at your desk or out among the "stacks," you can check items in/out, process fines, and review records.

> ✏️ Since Stax is a free companion app for Atriuum, you can use the same username and password to log on. Worker permissions enabled in Atriuum also apply to Stax.

Getting Started

Stax is accessible as a web-based desktop app in any browser supported by Atriuum and as a mobile app available from the App Store® or Play Store™. Once you open/download the app, you can find your library, log in using your Atriuum worker account, and start circulating.

Accessing the App

To access the *desktop* app, simply enter **stax.atriuum.com** into your web browser, and click the **Continue to Website** button at the bottom.

To access the *mobile* app, use the following steps:

1. Open the **App Store** (iOS 10.0 or higher; macOS® 11.0 or higher) or **Play Store** (Android™ 5.0 or higher).
2. Search for *Atriuum Stax*, and look for the app logo.
3. Follow prompts to install.
4. Apple users may be prompted to sign in with their Apple ID (which must have associated credit card information even though this app is free).

Scanner Requirements

On a desktop browser, you can use a USB or Bluetooth scanner. On a mobile device, you can use a Bluetooth scanner or the device's built-in camera; you will be prompted for access the first time you try to capture a barcode.

Square Requirements

Currently, Stax is compatible with the following readers; support for additional reader types will be available soon.

- Square™ Contactless and Chip Reader (all versions)
- Square Reader for Magstripe

Connecting to Your Library

Find your Atriuum database using the **Library Locator**.

If you allow the app access to your location, libraries in close proximity display first.

Otherwise, you can use the **Search** field to look for your library by name, state, ZIP code, etc. If applicable, tap a library type (**Public**, **School**, or **Church**) to filter for matching libraries. When you find the correct one, tap the name.
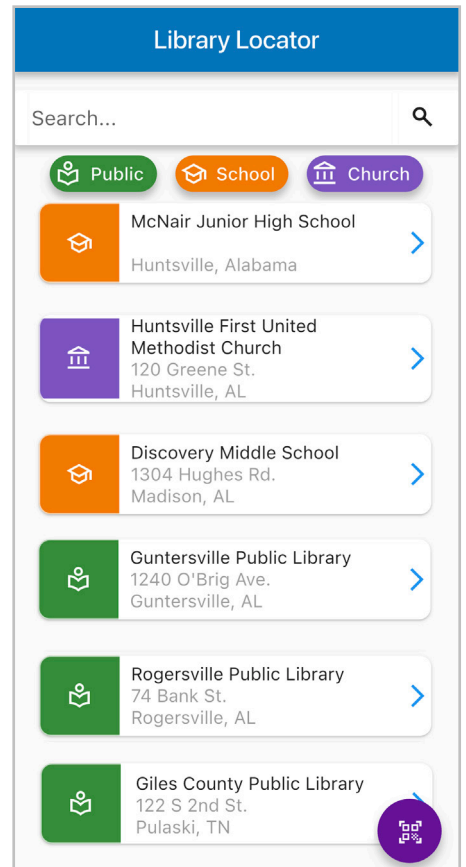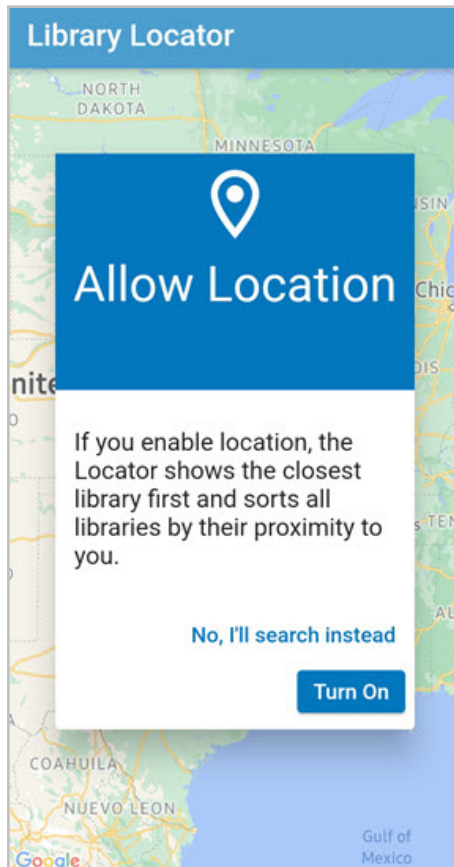
Logging In

Once you are connected to the library's database, enter your Atriuum username and password. Centralized users must select a branch. Then tap **Log In**.
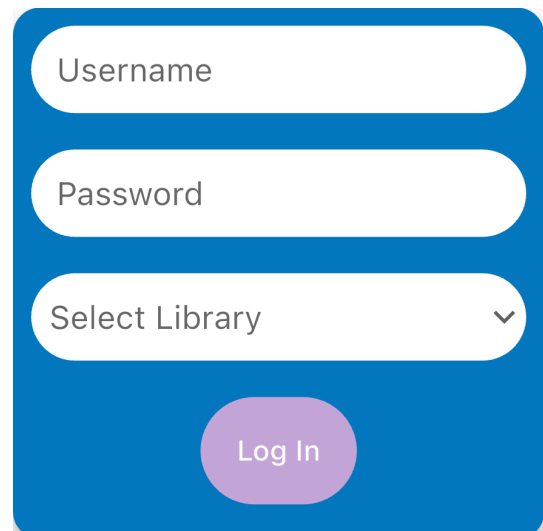
Once you've chosen a library and logged in, Stax remembers the location and worker on subsequent visits. Click the menu icon in the upper right if you need to sign out or switch libraries.

Using Stax

The **Circulation Workspace** allows you to check items in/out, process fines, and review records. Stax supports *super search*, meaning any query will look for barcodes, ISBNs, keywords, titles, names, etc. and locate the correct *patron* or *item* or provide a list of matches.

> When you find a patron in Stax, that record stays loaded so you can switch between check out, fines, and review without needing to look up the patron again. To dismiss a patron record, select the X to the right of their name.

Circulation - Check Out

When you open the app, the **Circulation** screen displays by default; if needed, select the **Circ** icon at the bottom (phone) or left side (desktop/tablet) to reopen this screen.

Use one of the following methods to check out items:

- **Scanner** - Scan the patron barcode and then the item barcodes.
- **Device Camera** - Tap the barcode icon in the search field, and capture the patron barcode. Once the patron is loaded, tap the barcode icon again, and capture the item barcode.
- **Search** - Select **Find a patron**, and enter a name. On your mobile device, tap in the search field; on a desktop, click the magnifying glass. Enter a holdings barcode, title, or keyword to find your items.

> If you need to assign a special due date, select the calendar icon and then choose a day *before* scanning/entering items.

- **Item Details** - If you search for an item *before* having a patron loaded, select the copy, and then select **Send # to Check Out**. Find the patron to complete the transaction.
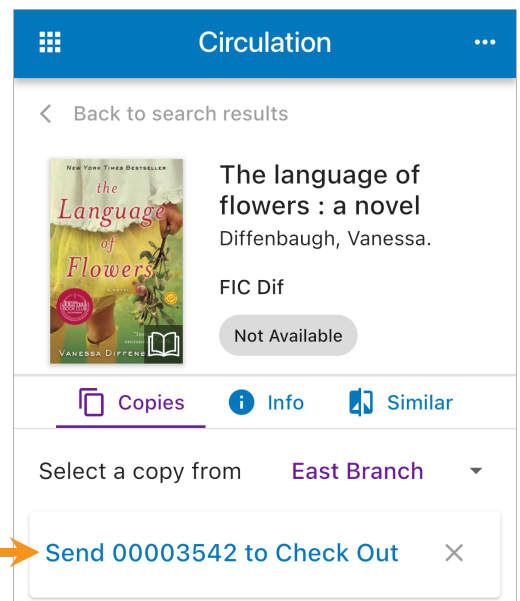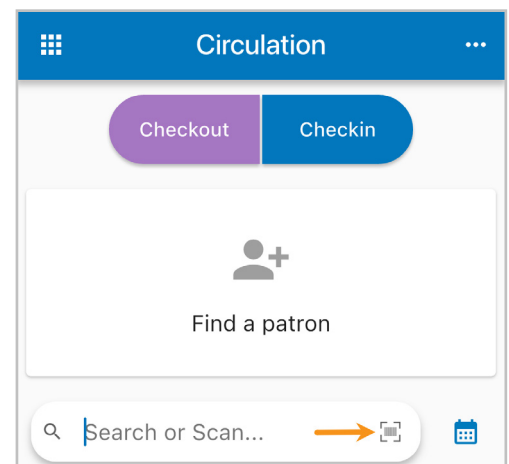
Items display onscreen with their status.

Tap an item at any time to check it in or renew it. If you receive an error, you can tap the item and override the issue (requires the **Override Circulation Rules** permission in Atriuum).
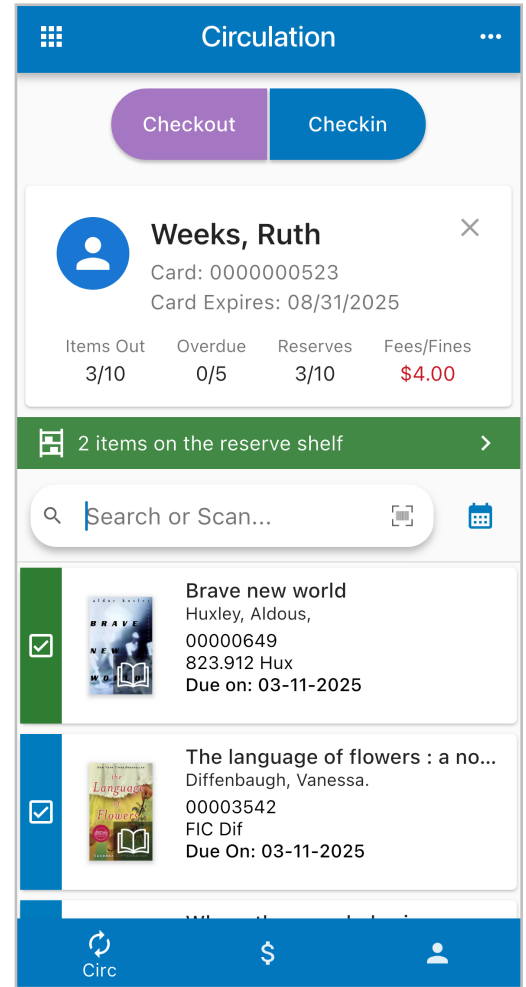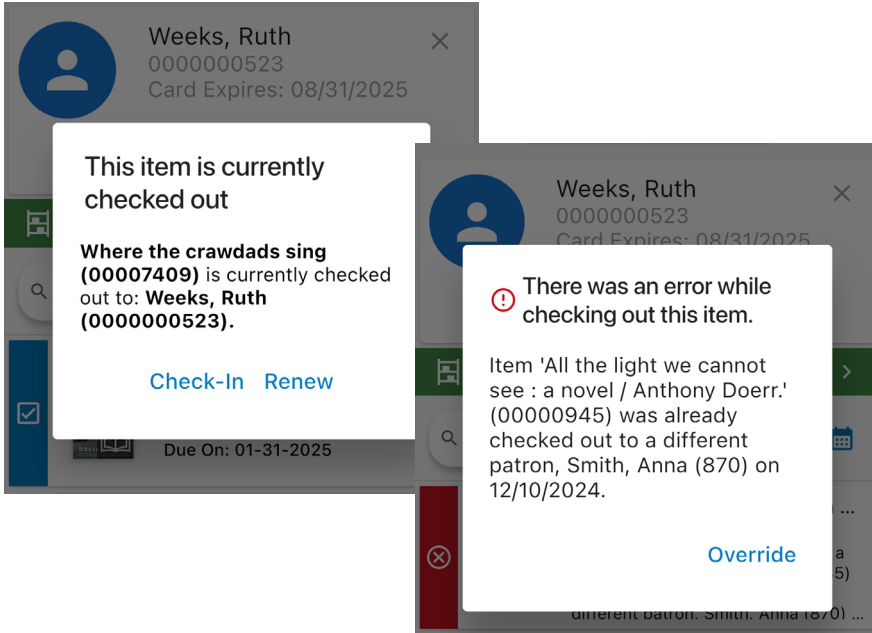
Success

Where the crawdads sing
Owens, Delia
00007409
813.6 Owe
Due On: 01-31-2025

Previously Checked Out

The language of flowers : a no...
Diffenbaugh, Vanessa.
00003542
FIC Dif
Due On: 01-31-2025

Error

Brave new world
00000649
Item 'Brave new world / Aldous Huxley.' (00000649) was already checked out to a different patron, Weeks. Ruth (0000000523) on 01/1...

Overdue

All the light we cannot see : a ...
Doerr, Anthony,
00000945
FIC Doe
Due On: 12-24-2024
Projected Fee: $0.00

Circulation - Check In

On the **Circulation** screen, select **Checkin** at the top to switch between transaction types. Use one of the following methods to process returned items:

- **Scanner** - Simply scan the item barcode.
- **Device Camera** - Tap the barcode icon in the search field, and capture the item barcode.
- **Search** - On your mobile device, tap in the search field; on a desktop, click the magnifying glass. Enter a holdings barcode.
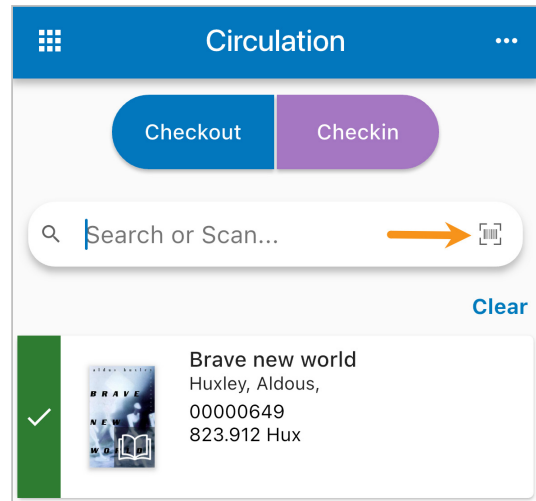
You can also check in items while doing other tasks in the app:

- **Checkout** - Tap an item from the patron's list, and then tap **Check-In**.
- **Item Details** - If you open an item from search results, select the copy, and then select **Send # to Check In**.
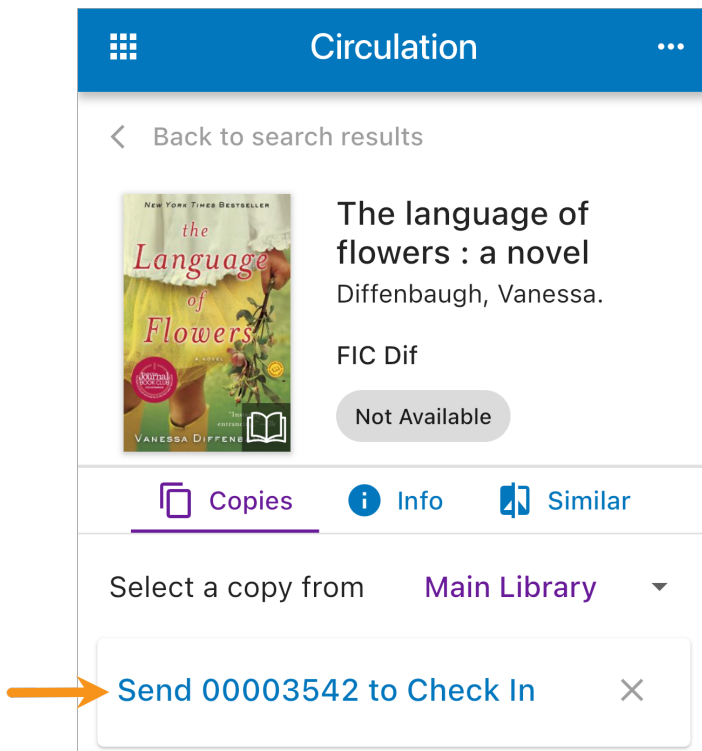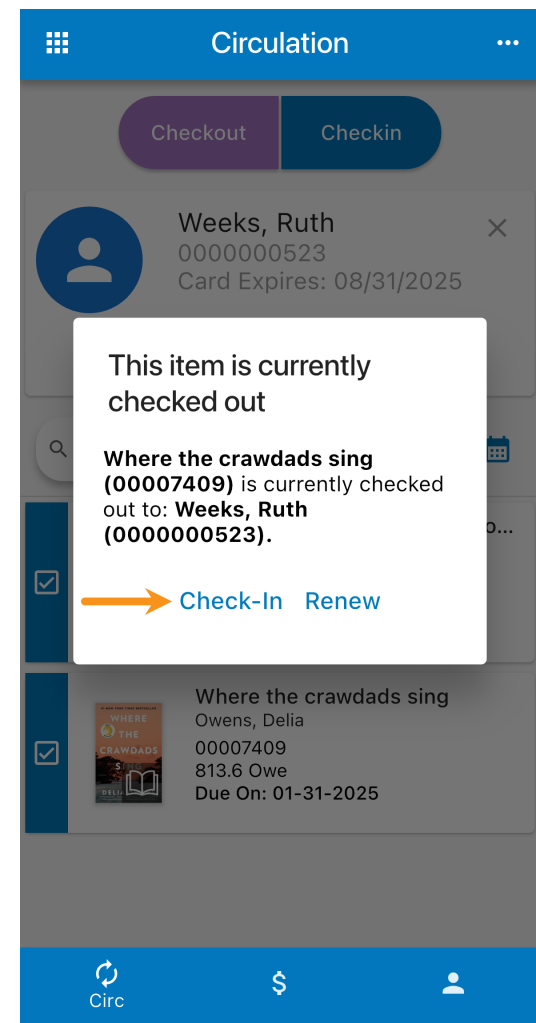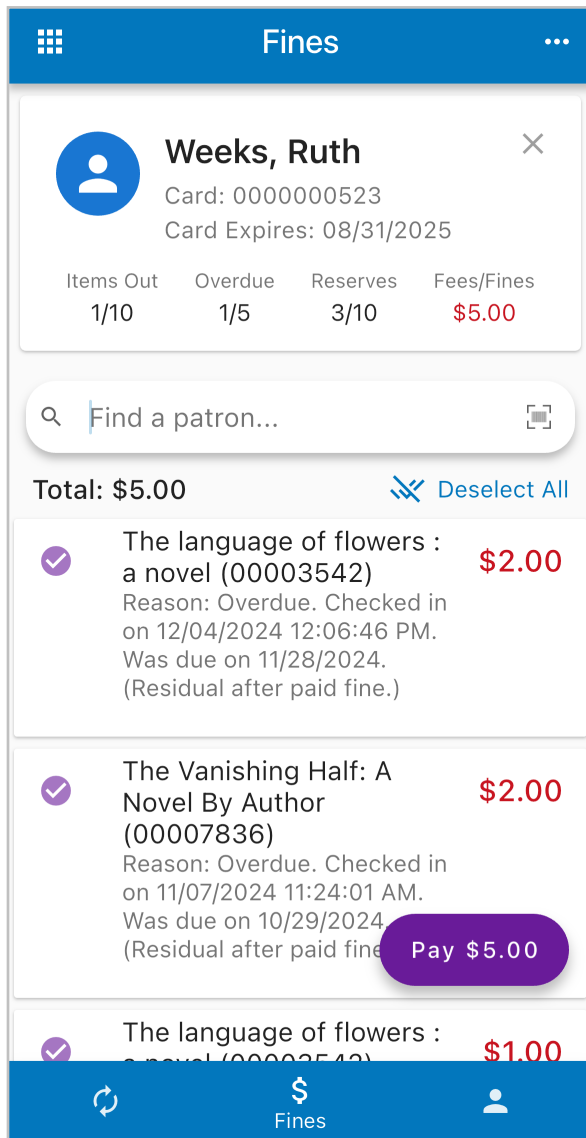
Fines - Cash/Card

This screen allows you to process fine/fee payments that are automatically synced to Atriuum. The following steps are for accepting cash or recording credit card payments processed outside of Stax; if you're using Square (integrated with Stax), skip to the next section.

Select the **Fines** icon at the bottom (phone) or left side (desktop/tablet) to open this screen.
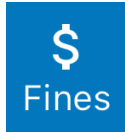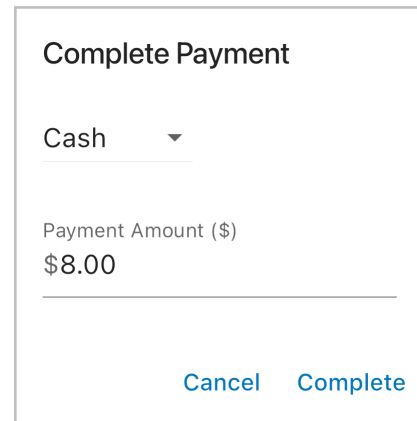
$
Fines

1. Locate the patron in one of the following ways:
   - **Scanner** - Scan the patron barcode.
   - **Device Camera** - Tap the barcode icon in the search field, and capture the patron barcode.
   - **Search** - Select **Find a patron**, and enter a name.

2. All fines/fees are selected initially. Deselect charges as needed.

3. Select **Pay** (bottom right).

Fines

Weeks, Ruth
Card: 0000000523
Card Expires: 08/31/2025

Items Out	Overdue	Reserves	Fees/Fines
1/10	1/5	3/10	$5.00

Find a patron...

Total: $5.00   Deselect All

The language of flowers : a novel (00003542) $2.00
Reason: Overdue. Checked in on 12/04/2024 12:06:46 PM. Was due on 11/28/2024. (Residual after paid fine.)

The Vanishing Half: A Novel By Author (00007836) $2.00
Reason: Overdue. Checked in on 11/07/2024 11:24:01 AM. Was due on 10/29/2024. (Residual after paid fine.)

Pay $5.00

The language of flowers : a novel (00003542) $1.00

Fines

Complete Payment

Cash ▾

Payment Amount ($)
$8.00

Cancel   Complete

4. Use the drop-down list to select **Credit Card** if needed.

5. Edit the payment amount if needed.

6. Select **Complete**.

7. Once the payment has been processed, charges are either removed or subtracted as applicable. Transactions are automatically synced in Atriuum and indicated by **[Via Stax]** in the **History Action Comment** column in history reports.

Fines - Square

The following steps are for processing credit card payments using Square on a mobile device.

> ⚠️ Prior to using this feature, you must set up a Square account for your library, install the Square Point of Sale™ app on your device, and confirm that you have Bluetooth enabled.

1. Locate the patron in one of the following ways:

    - **Scanner** - Scan the patron barcode.

    - **Device Camera** - Tap the barcode icon in the search field, and capture the patron barcode.

    - **Search** - Tap **Find a patron**, and enter a name.

2. All fines/fees are selected initially. Deselect charges as needed.

3. Tap **Pay** (bottom right).

4. Use the drop-down list to select **Square**.

5. For your *first* transaction, do the following:

    - Tap **Log in to Square**, and sign in using your credentials.

    - Tap **Connect Reader** or **Reader Settings**. Follow the prompts to pair your device; then go back to the previous screen.

6. Edit the payment amount if needed.

7. Tap **Complete**.

8. Follow the prompts to accept payment and specify if/how the patron wants a receipt.

9. Once the payment has been processed, charges are either removed or subtracted as applicable. Transactions are automatically synced in Atriuum and indicated by **[Via Stax]** in the **History Action Comment** column in history reports.

Troubleshooting Tips

- If you receive an error saying your reader failed to pair, you may need to open the Bluetooth settings for your device (or any other device that has been connected to the reader) and select "forget." Then repeat the steps to pair.

- If Stax does not detect your reader when trying to pair, its battery may be too low. Charge your reader before trying to pair again.

- If you still encounter difficulties with your reader, please refer to Square's documentation or contact Square's technical support.

Review Patron

This screen allows you to view/edit a patron's basic details, contact information, OPAC account credentials, and history settings.

To get started, select the **Patron** icon at the bottom (phone) or left side (desktop/tablet).

1. Locate the patron in one of the following ways:
   - **Scanner** - Simply scan the patron barcode.
   - **Device Camera** - Tap the barcode icon in the search field, and capture the patron barcode.
   - **Search** - Tap **Find a patron**, and enter a name.
2. Switch tabs to view additional data: **Info**, **Contact**, **OPAC**, or **History**.
3. Select **Edit**, make changes, and then select **Save**. Modifications are automatically synced to Atriuum.
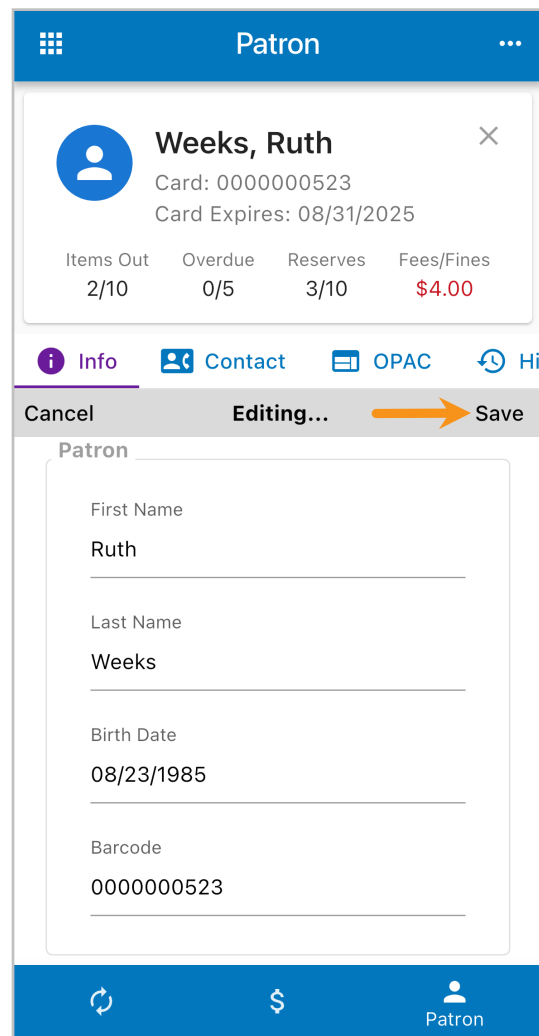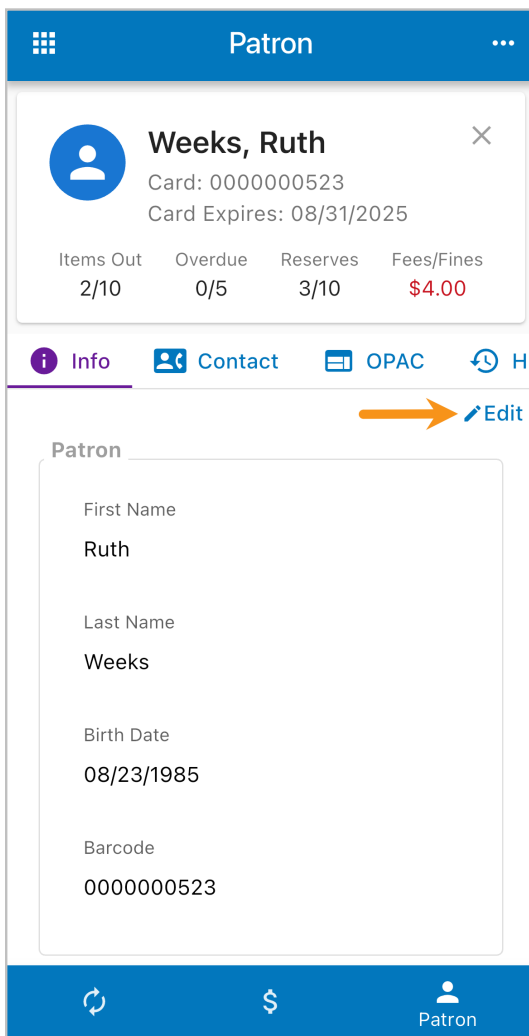
Worker Settings

Each worker who uses Stax can enable sounds on their device and specify if they want the app to remember their search history.

1. Select the menu button in the upper right.
2. Select your worker name.
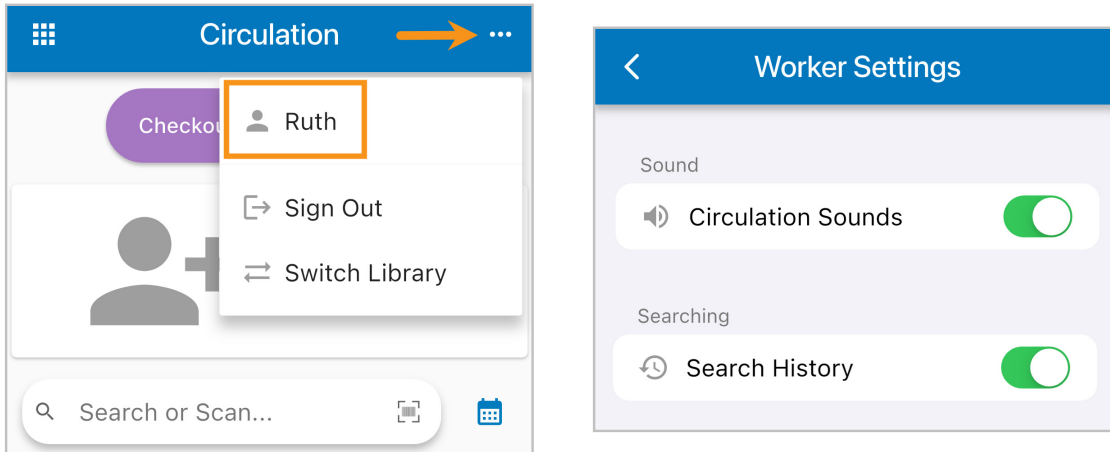
3. Choose to enable/disable circulation sounds and search history. Changes are automatically saved.
4. Select the back arrow to continue working.

Future Workspaces

This early version of Stax focuses on circulation only. Upcoming enhancements will include a **Catalog Workspace** which provides quick cataloging, MARC editing, subject/author validation, and more as well as an **Acquisitions Workspace** which helps you track funding, orders, invoices, and brief records for new items.

Questions? Reach out to our Technical Support Staff or Sales.
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