

Receipt Configuration – Available Hold Slips

Revised January 30, 2020

If your library has receipt printers, a receipt will need to be configured for each type of receipt you use in each wizard. There is no one receipt configuration that carries through to the same type of receipt in the next wizard.

These wizards contain the Available Hold Slips for items available for pickup at your library.

- Discharge
- Fine Free Discharge
- Check Item Status
- Remove User Hold
- Remove Item Hold
- Trap Holds
- Onshelf Items
- Discharging Bookdrop
- Pending Transits

When choosing information to include on these receipts, please do not include any Patron Private Identifying Information (PII). Because receipts, transit labels, and other documents are often left in library materials, we recommend against inclusion of PII such as full name, Patron ID, and patron contact information. Library staff should routinely check materials for old receipts and transit labels and dispose of them in a secure manner.

Available Hold slips are configured by logging into WorkFlows using the supervisor login.

Log into WorkFlows using the Supervisor login:

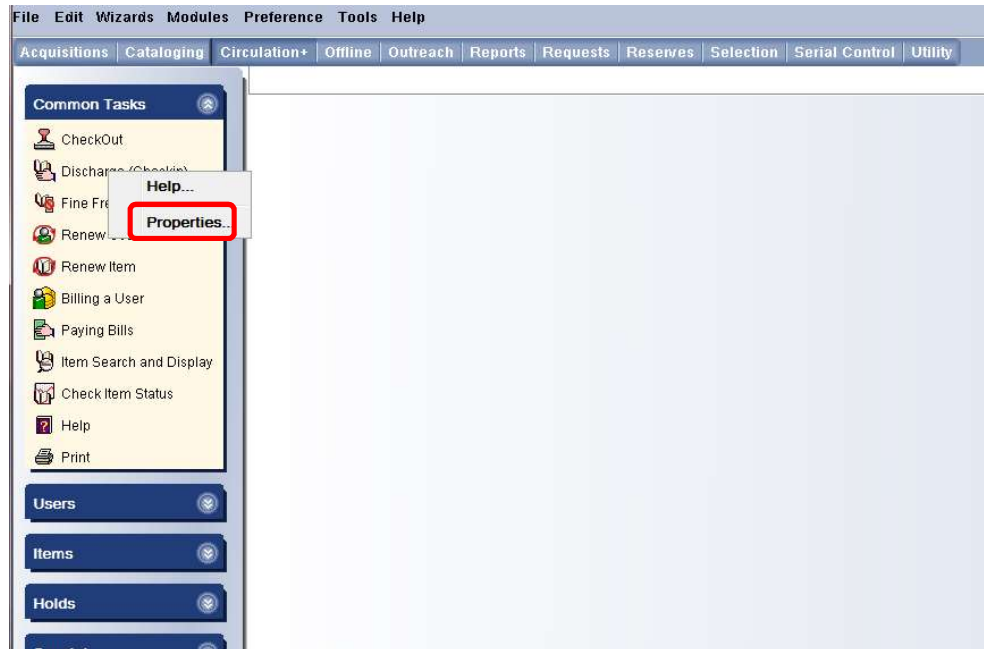
- Enter your WorkFlows library name followed by SUPER. The pin is also SUPER.
Example:



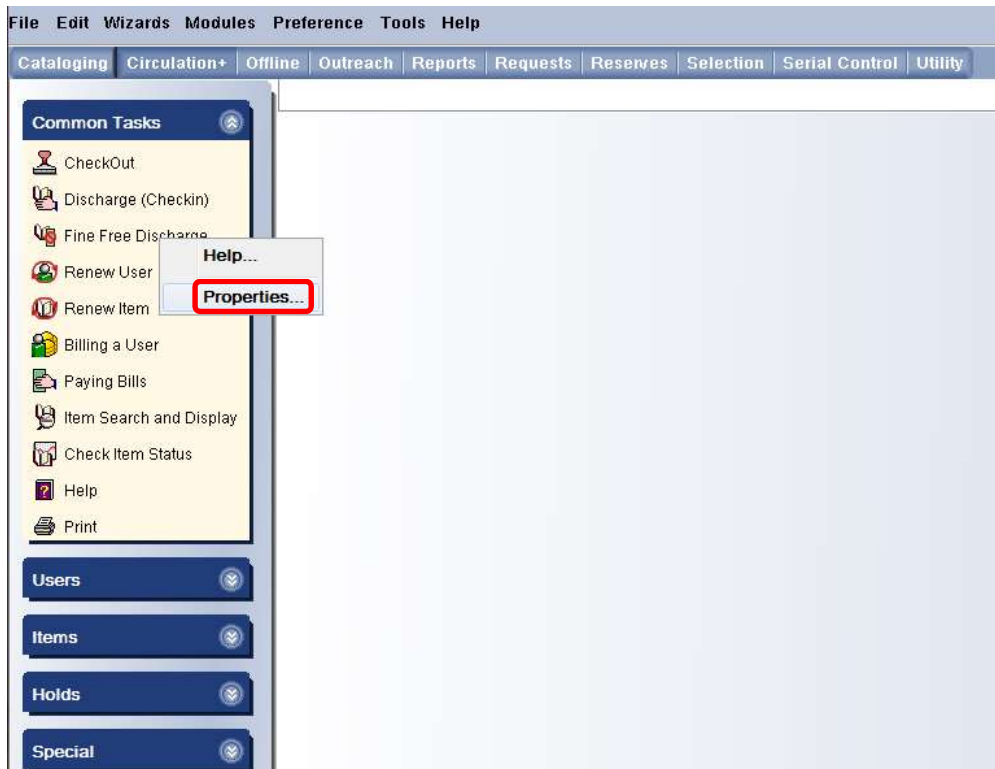
In the Circulation module:

- Place the cursor on the name of the circulation wizard that contains the receipt to be configured and right click.
- Select Properties from the drop down menu.

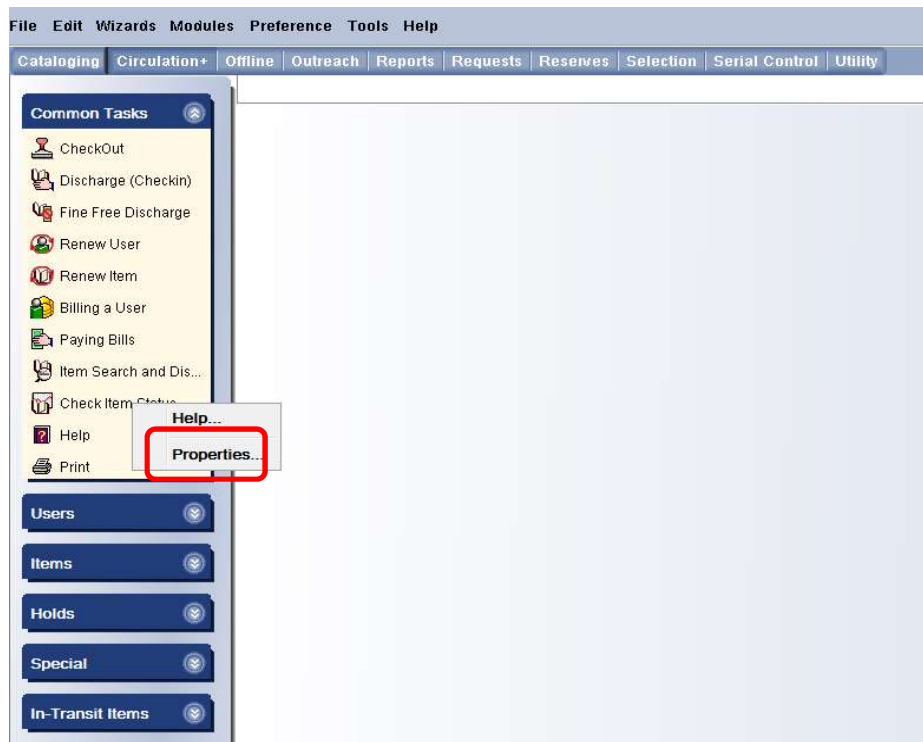
Discharge Wizard:



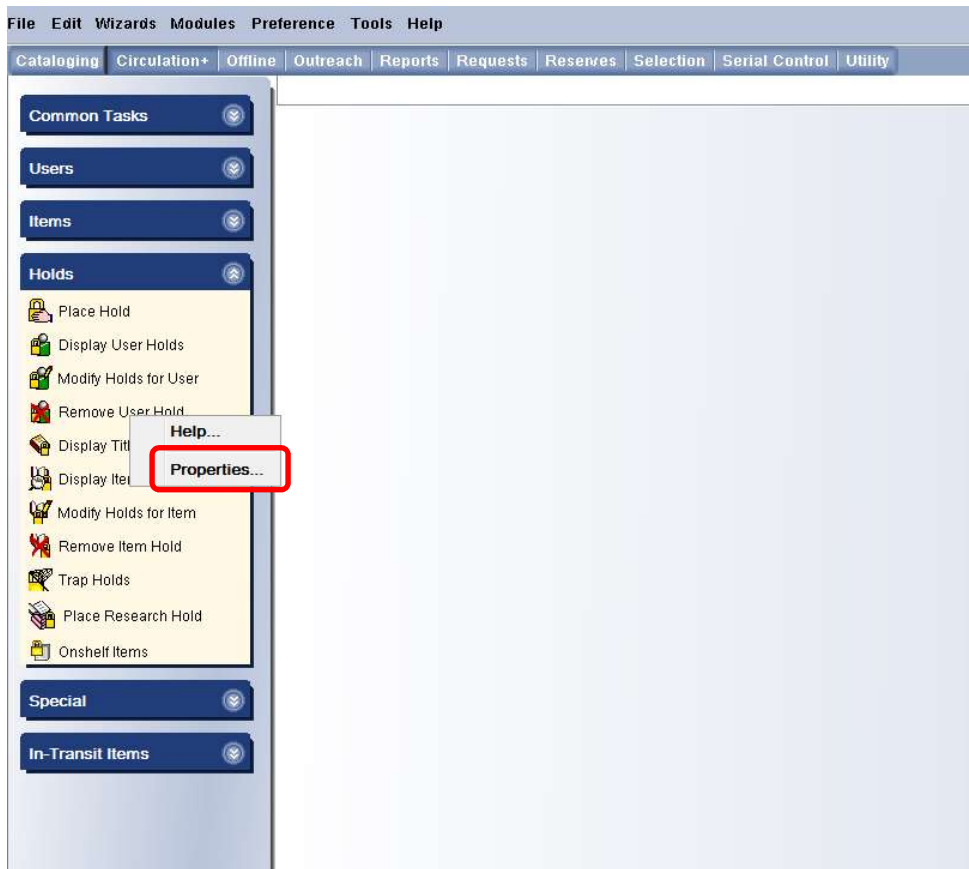
Fine Free Discharge Wizard:



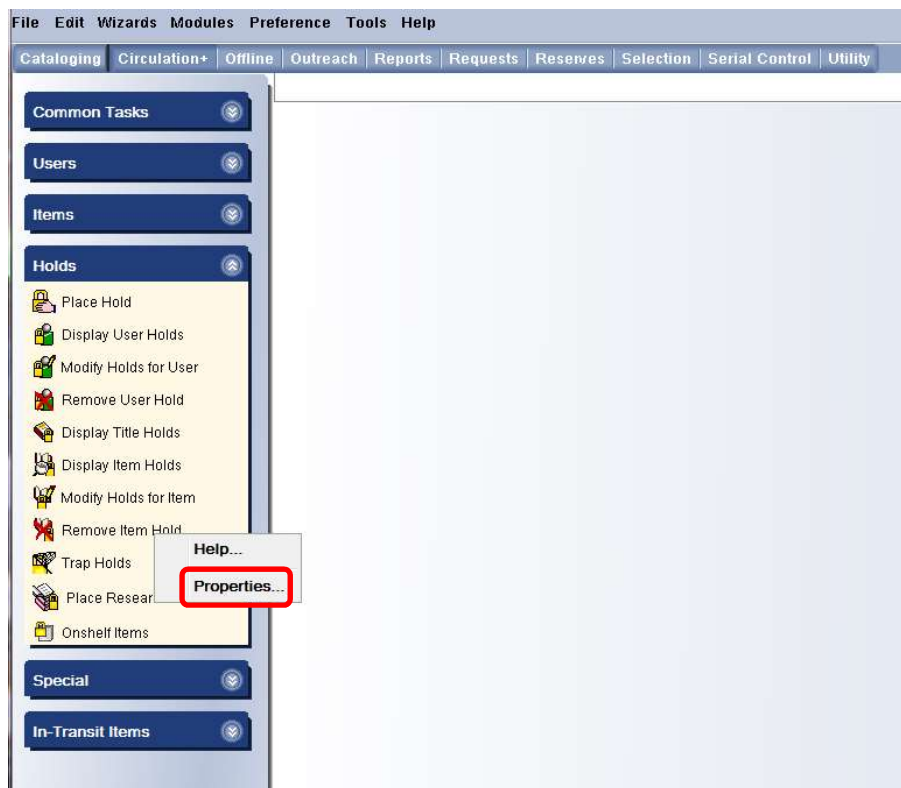
Check Item Status Wizard:



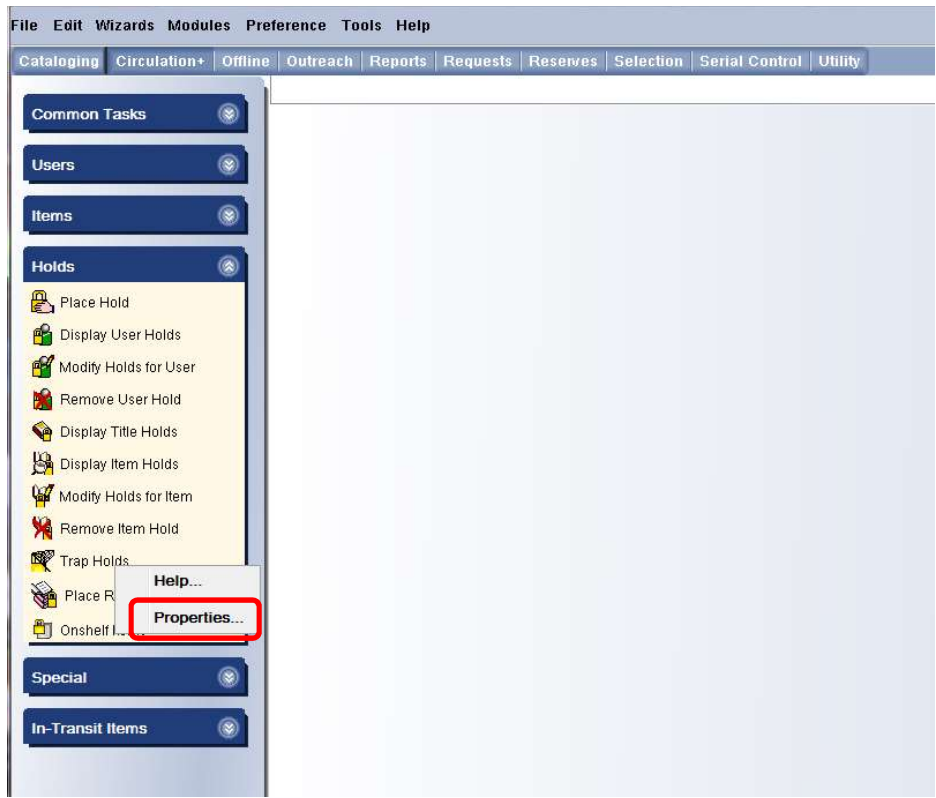
Remove User Hold Wizard:



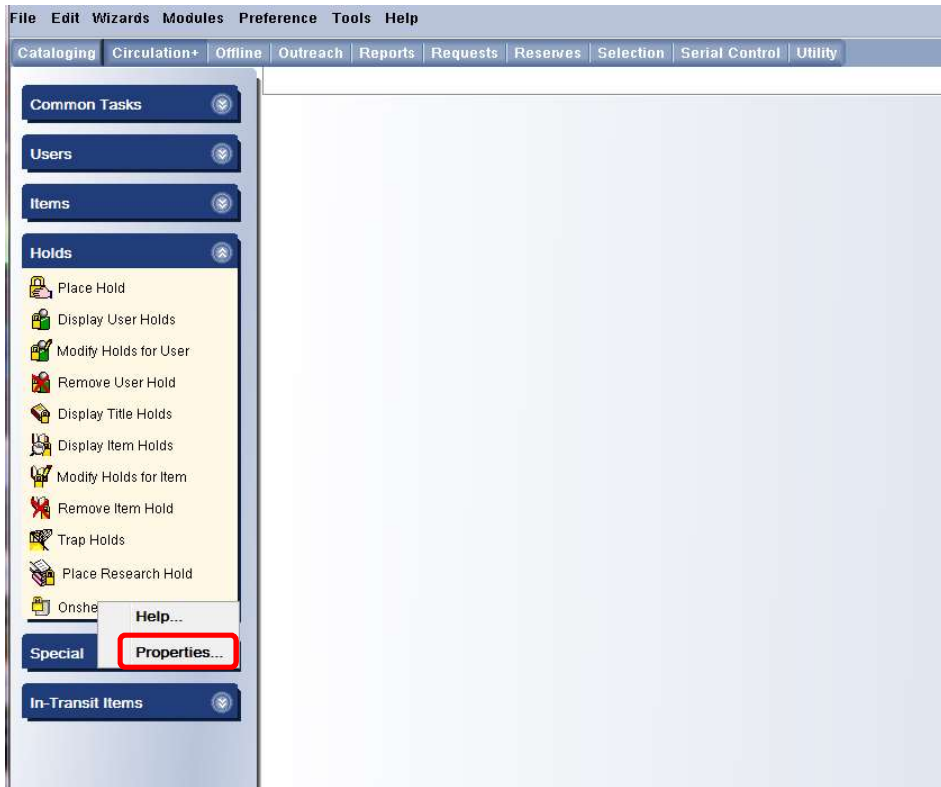
Remove Item Hold Wizard:



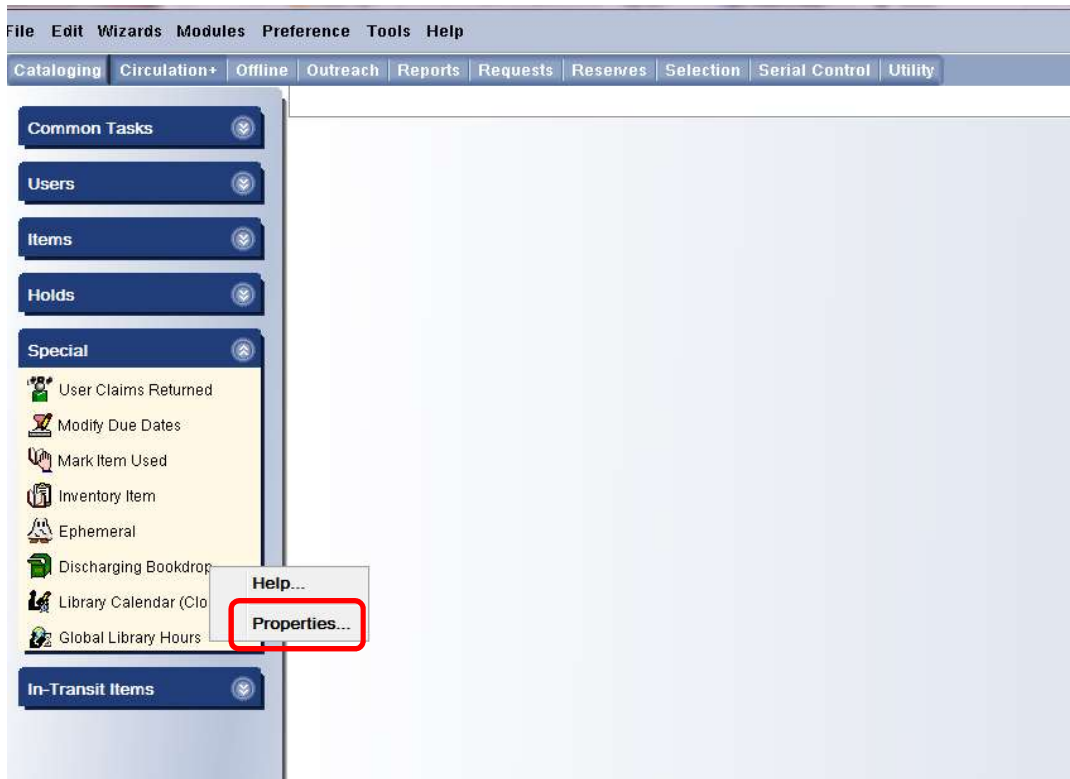
Trap Holds Wizard:



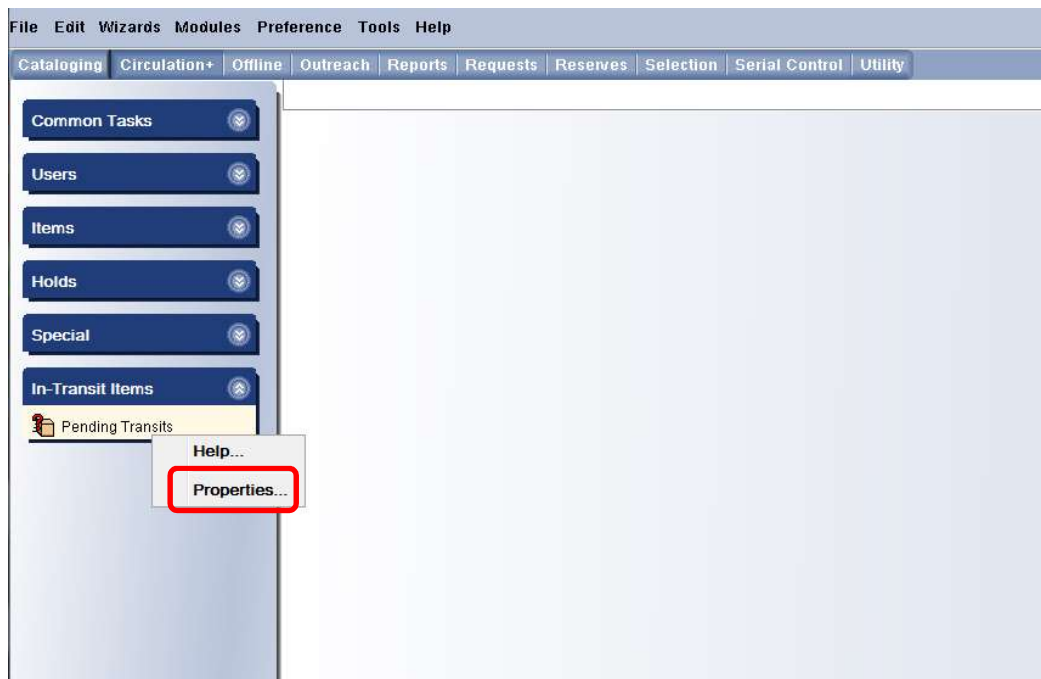
Onshelf Items Wizard:



Discharging Bookdrop Wizard:



Pending Transits Wizard:



Receipt (Available Hold)

The Set Properties popup box contains a checked box labeled Print available hold slips on the Behavior tab.

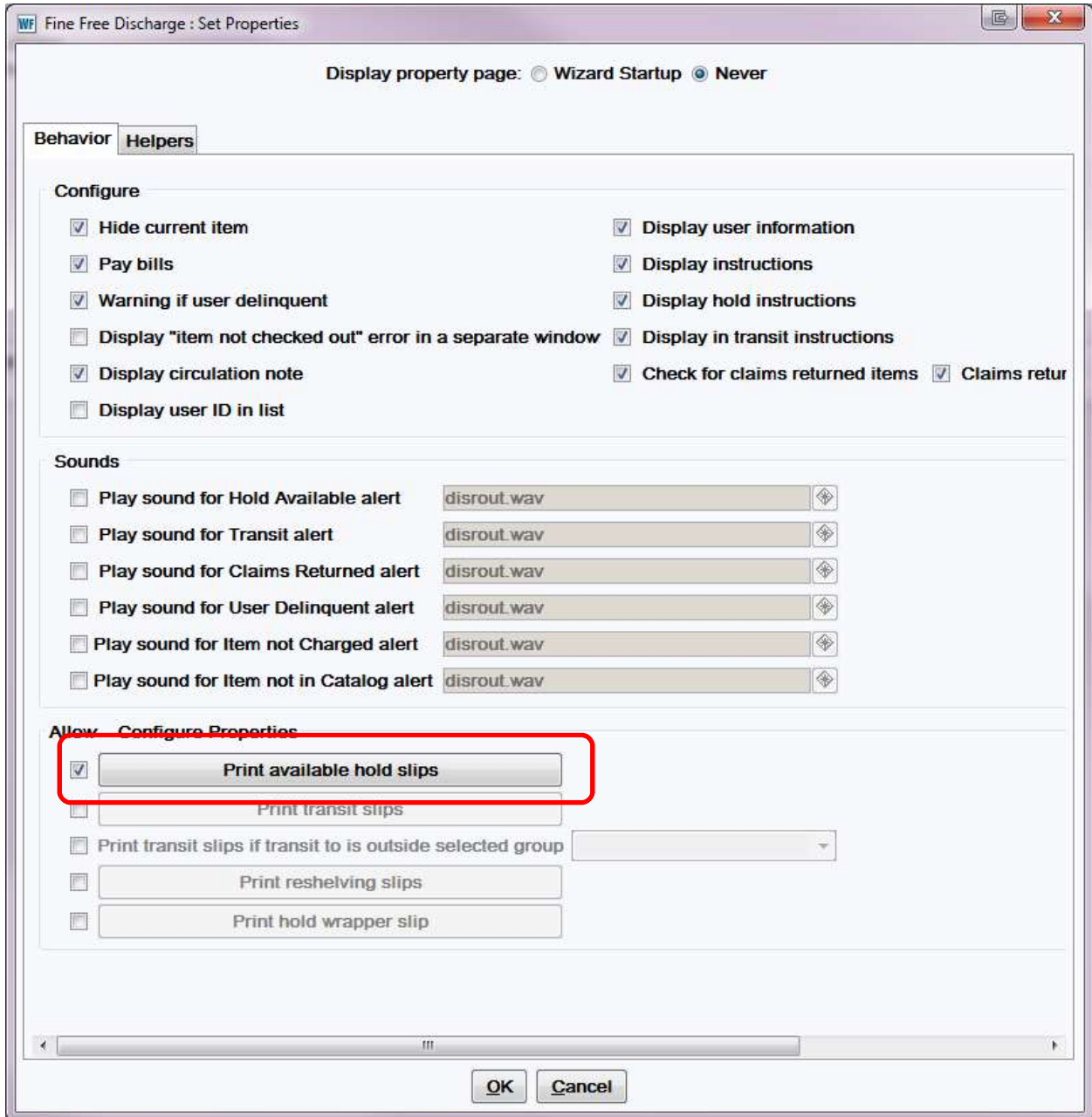
Make sure the check box is selected and click the Print available hold slips bar to the right of the checked box.

Discharge wizard:

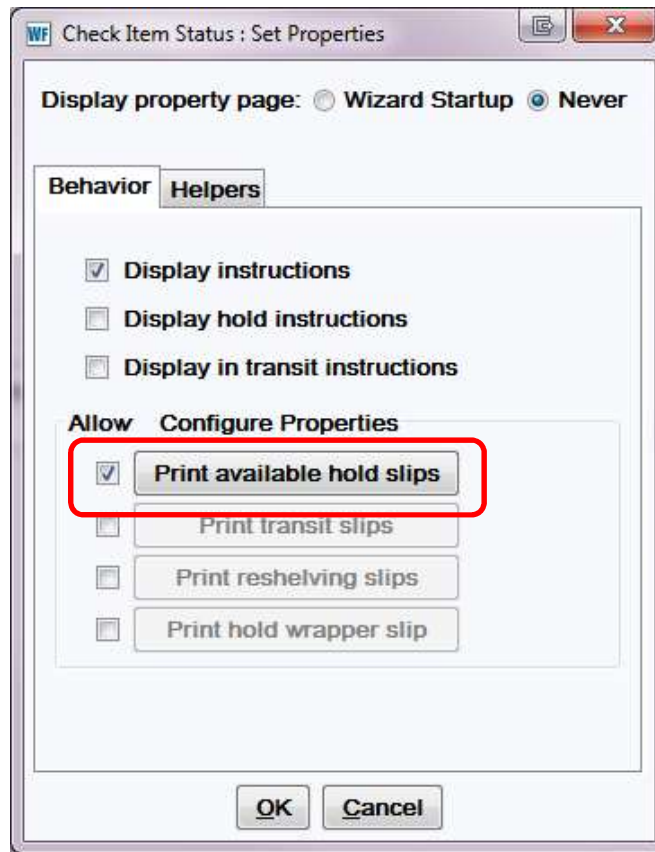
The screenshot shows the 'Discharge (Checkin) : Set Properties' dialog box with the 'Behavior' tab selected. The 'Display property page' options are 'Wizard Startup' and 'Never', with 'Never' selected. The 'Configure' section contains various checkboxes for displaying information and instructions. The 'Sounds' section lists several alert sounds, all set to 'disrout.wav'. The 'Allow Configure Properties' section at the bottom has several checkboxes, with 'Print available hold slips' checked and highlighted by a red rectangle. Other checkboxes include 'Print transit slips', 'Print transit slips if transit to is outside selected group', 'Print reshelving slips', and 'Print hold wrapper slip'. The 'OK' and 'Cancel' buttons are at the bottom.

Section	Property	Value
Configure	Hide current item	<input type="checkbox"/>
	Pay bills	<input checked="" type="checkbox"/>
	Warning if user delinquent	<input type="checkbox"/>
	Display "item not checked out" error in a separate window	<input checked="" type="checkbox"/>
	Display circulation note	<input checked="" type="checkbox"/>
	Display bill warning for every item	<input type="checkbox"/>
	Display user information	<input checked="" type="checkbox"/>
	Display instructions	<input checked="" type="checkbox"/>
	Display hold instructions	<input checked="" type="checkbox"/>
	Display in transit instructions	<input checked="" type="checkbox"/>
Accumulate fines	Yes	<input type="radio"/>
	No	<input checked="" type="radio"/>
	Prompt	<input type="radio"/>
	Check for claims returned items	<input checked="" type="checkbox"/>
	Claims returned alert: allow modify user prompt	<input checked="" type="checkbox"/>
	Display user ID in list	<input checked="" type="checkbox"/>
Sounds	Play sound for Hold Available alert	<input type="checkbox"/> disrout.wav
	Play sound for Transit alert	<input type="checkbox"/> disrout.wav
	Play sound for Claims Returned alert	<input type="checkbox"/> disrout.wav
	Play sound for User Delinquent alert	<input type="checkbox"/> disrout.wav
	Play sound for Item not Charged alert	<input type="checkbox"/> disrout.wav
	Play sound for Item not in Catalog alert	<input type="checkbox"/> disrout.wav
Allow Configure Properties	Print available hold slips	<input checked="" type="checkbox"/> [Button]
	Print transit slips	<input checked="" type="checkbox"/> [Button]
	Print transit slips if transit to is outside selected group	<input type="checkbox"/> [Dropdown]
	Print reshelving slips	<input type="checkbox"/> [Button]
	Print hold wrapper slip	<input checked="" type="checkbox"/> [Button]

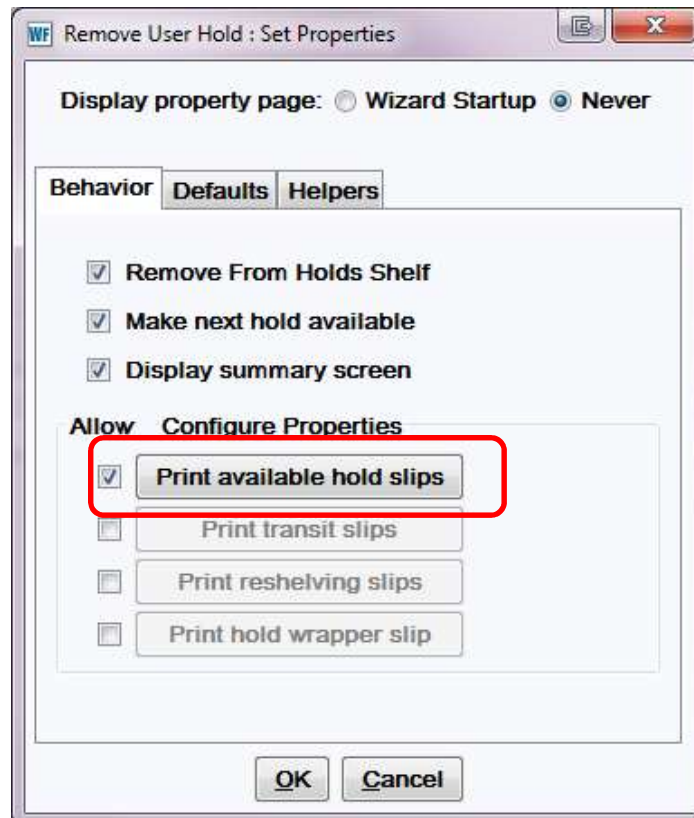
Fine Free Discharge wizard:



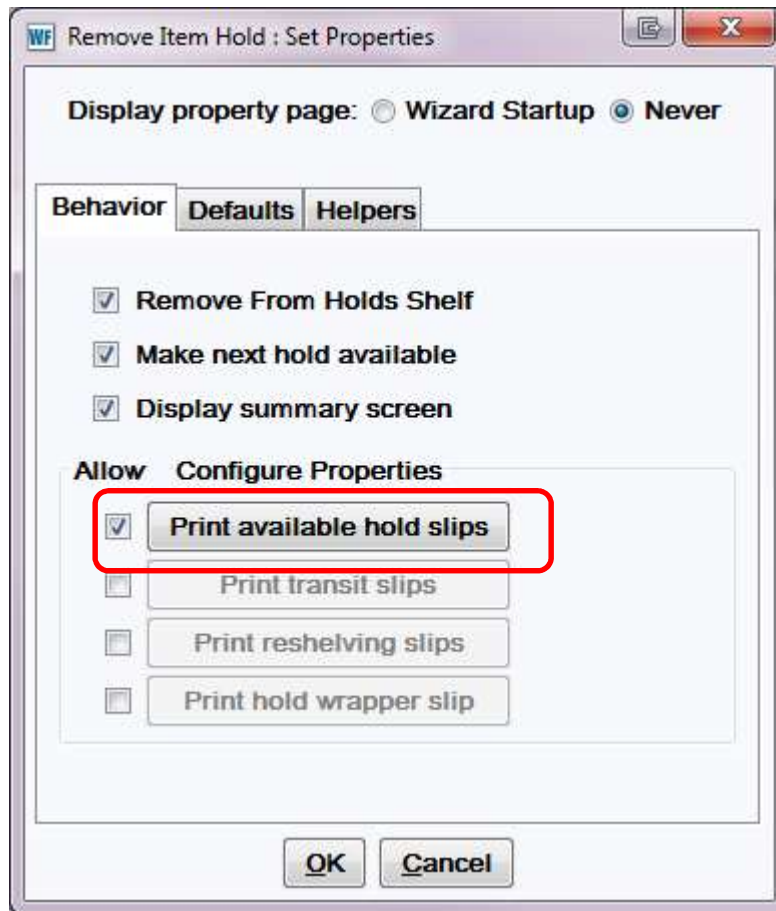
Check Item Status wizard:



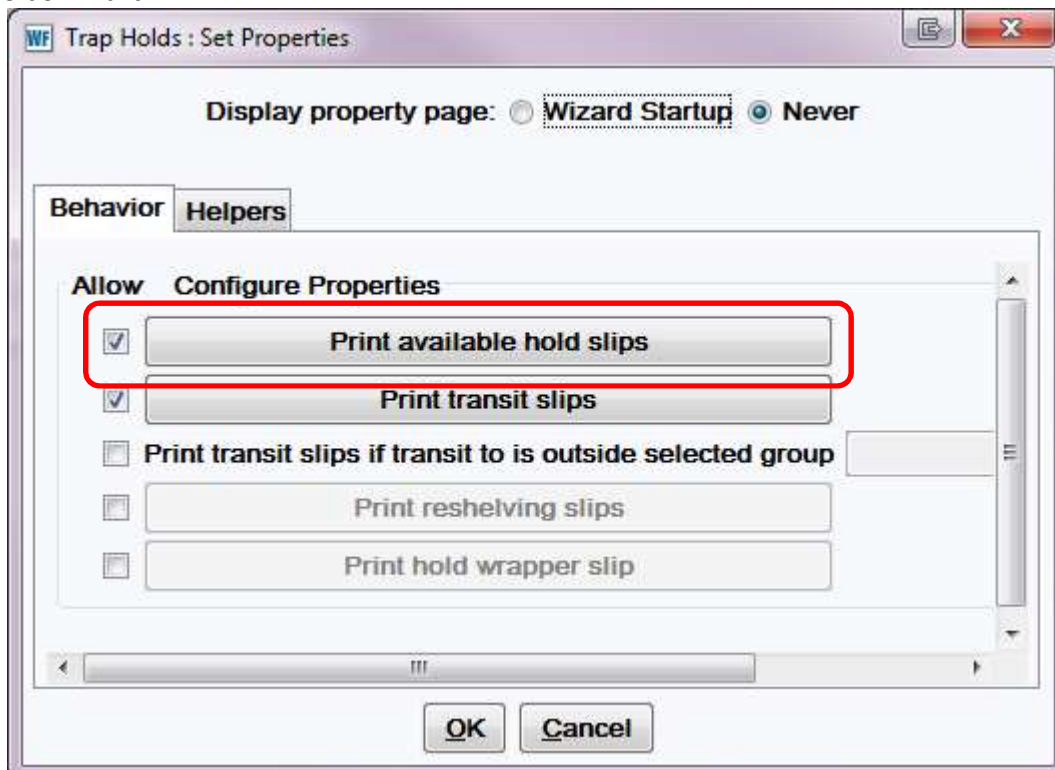
Remove User Hold wizard:



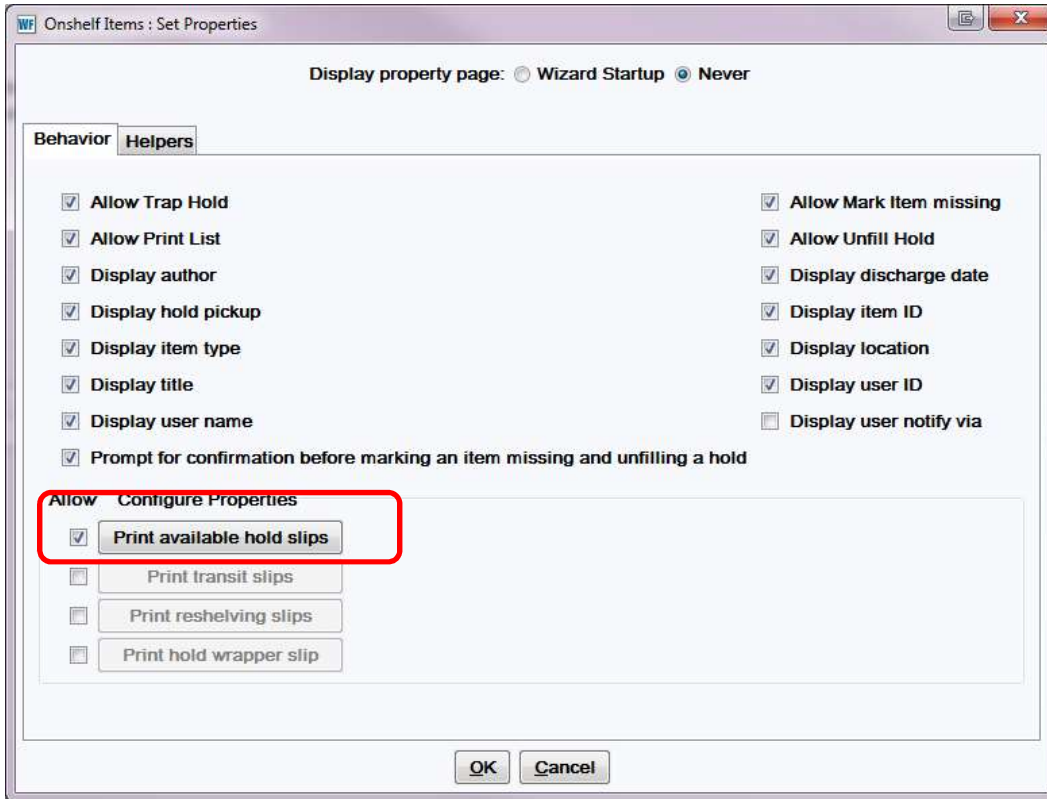
Remove Item Hold wizard:



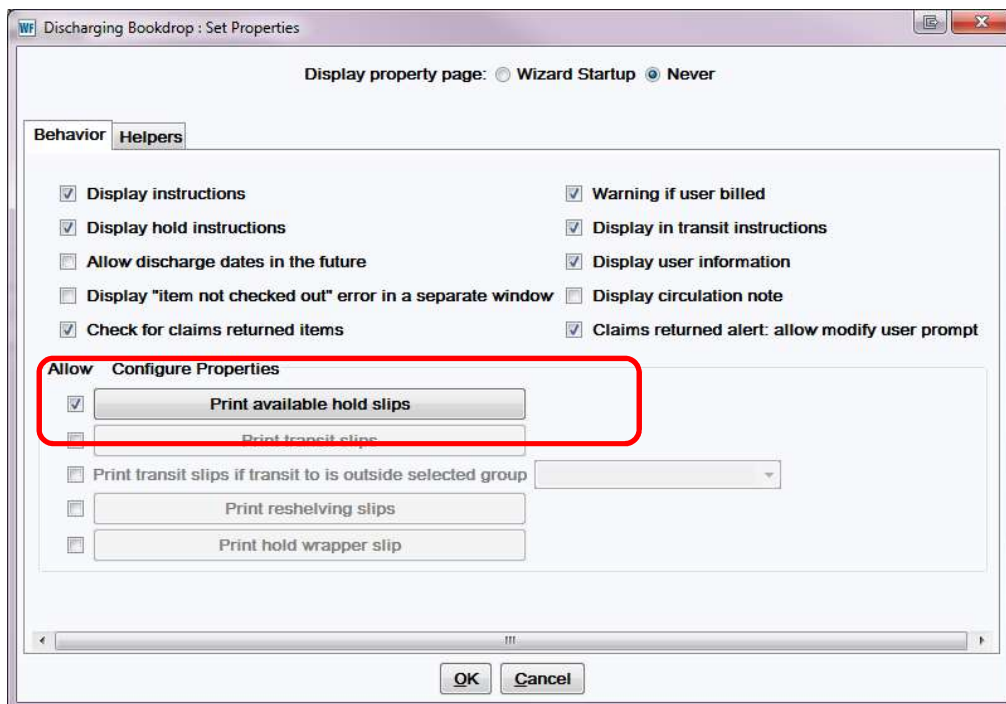
Trap Holds wizard:



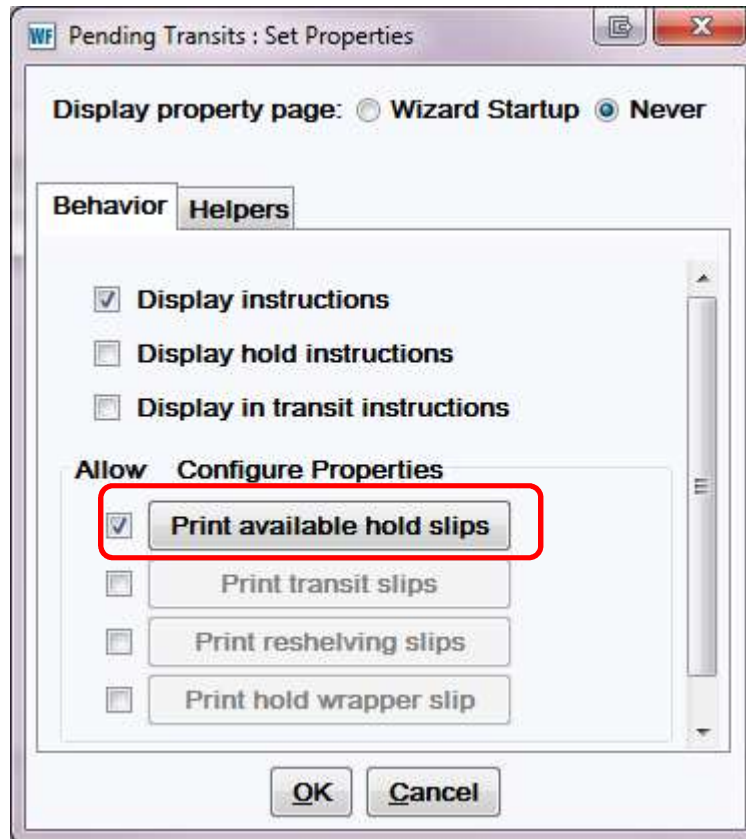
Onshelf Items wizard:



Discharging Bookdrop wizard:




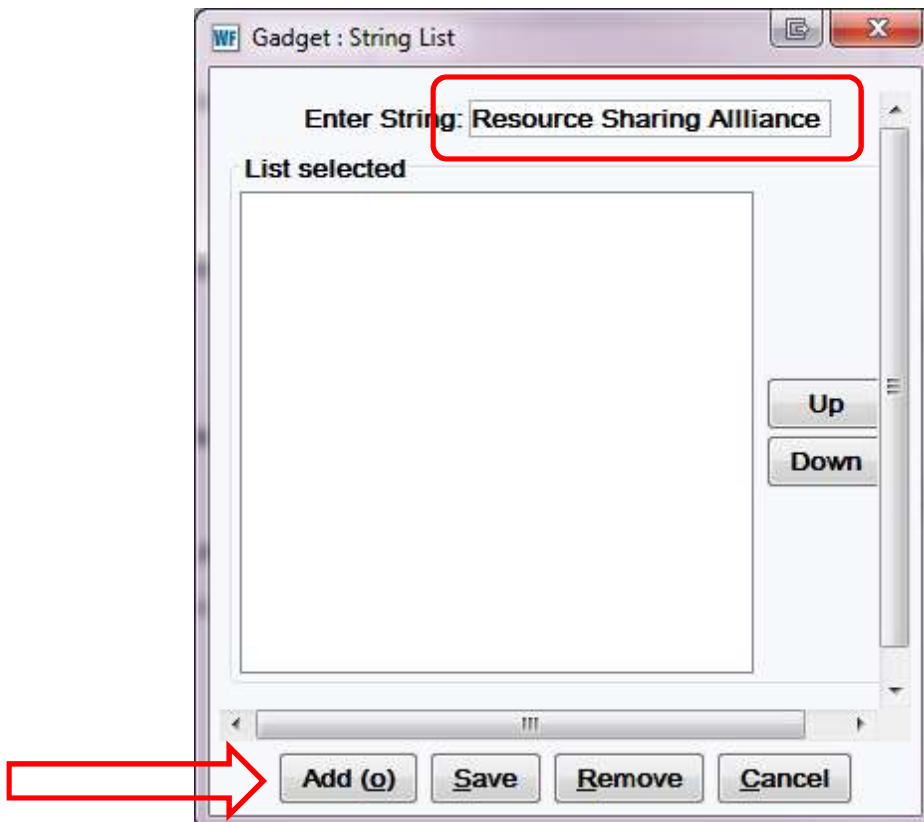
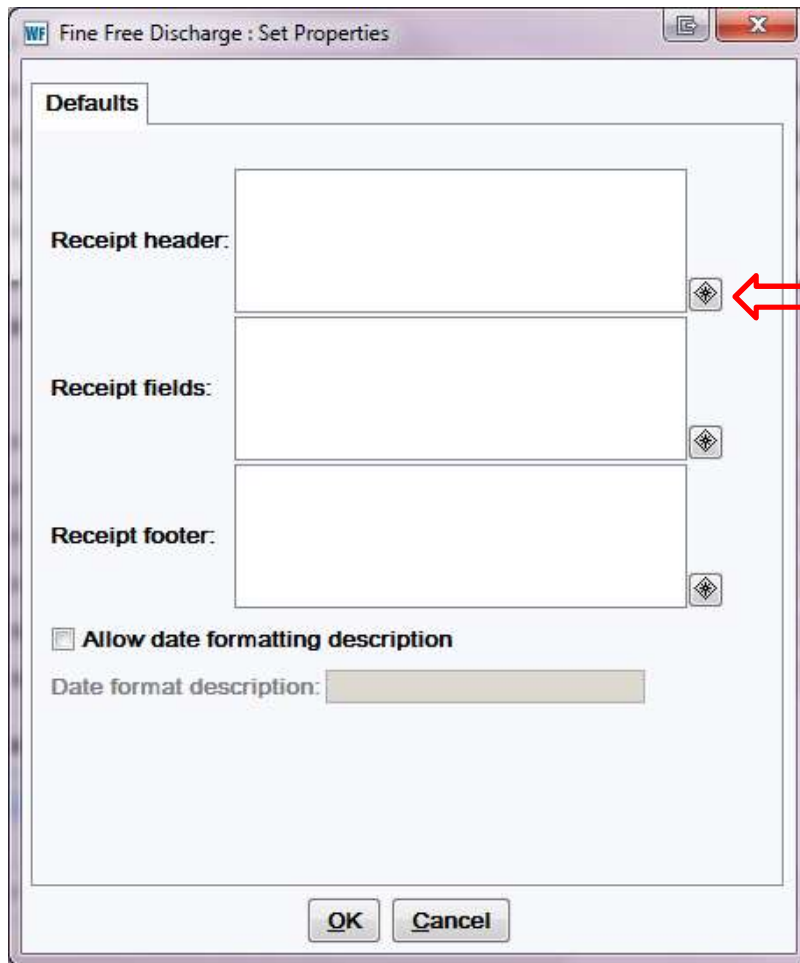
Pending Transits wizard:



The Set Properties box will pop up.

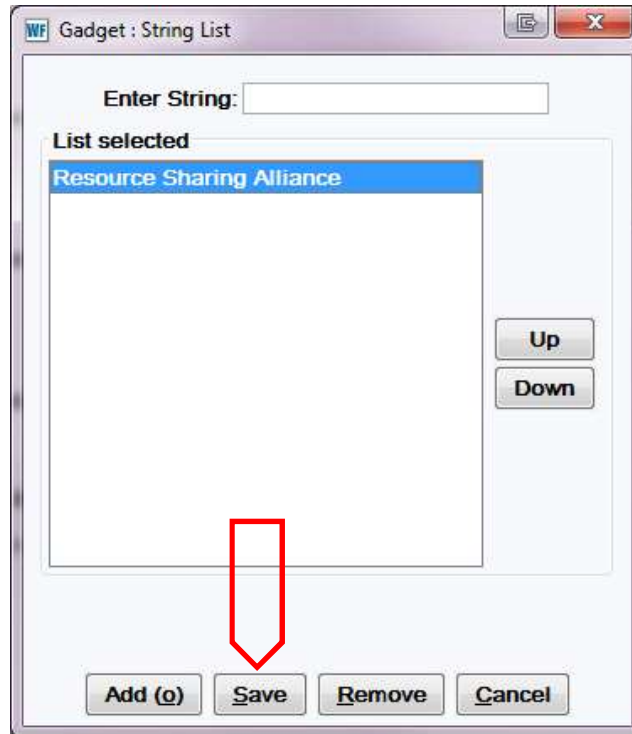
- Print available hold slips: Prints a hold slip for items to be picked up at your library.
- ❖ Receipt Header (Optional): *Since hold slips are used internally you may choose not to enter information into the receipt header. If you are not entering information into the receipt header skip the receipt header setup.*

Click the gadget  to the right of the Receipt Header box to enter information that will appear on the top of the receipt. The most common entry will be the library name.

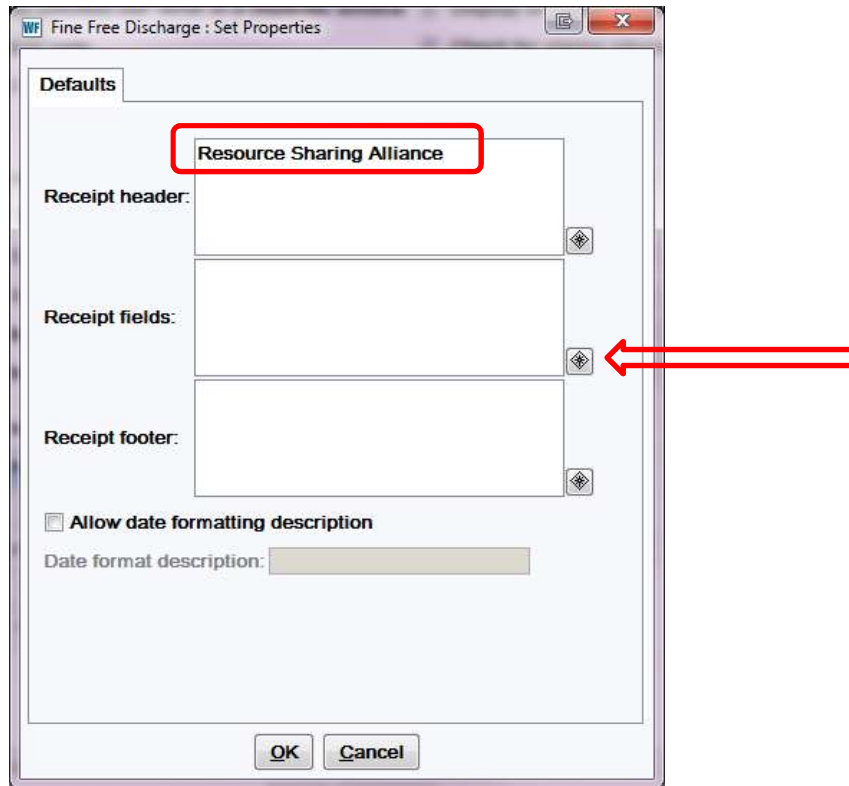


- Enter the information into the Enter String box and click the Add button on the bottom of the Gadget: string List box

There are a limited number of characters that can be entered in the Enter String box. The limit depends on the characters that you enter into the string. If your library name or other information is too long add the text and create an additional text string.




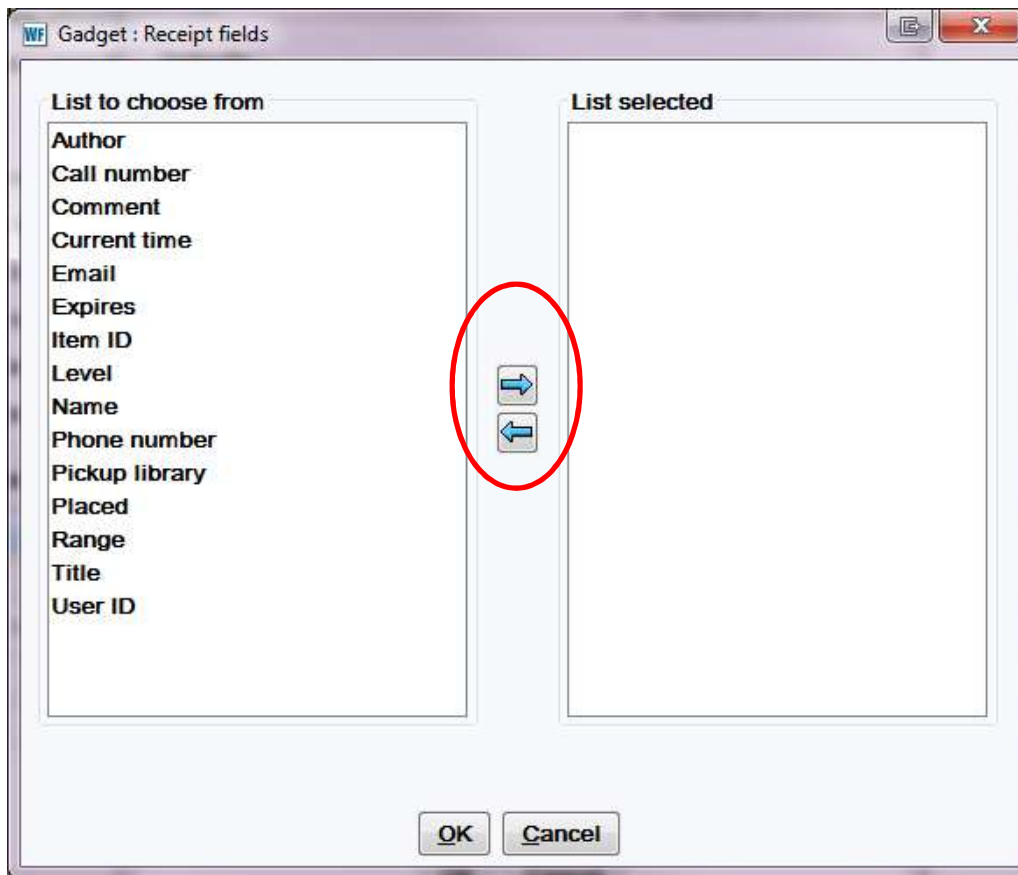
The information added to the Receipt Header will appear in the List Selected display box. When you have finished adding the receipt header information click the Save button on the bottom of the Gadget: string list popup box.



The information added to the Receipt header will appear in the receipt header display box on the Set Properties popup box.

❖ Receipt fields:

Click the gadget  to the right of the Receipt fields display box to select the information that will be included on your receipt. (See previous page)



Use the arrows in the middle of the Gadget: receipt fields pop up box to move the information to be included on the receipt from the “List to choose selection” list on the left to the “List selected box” on the right.

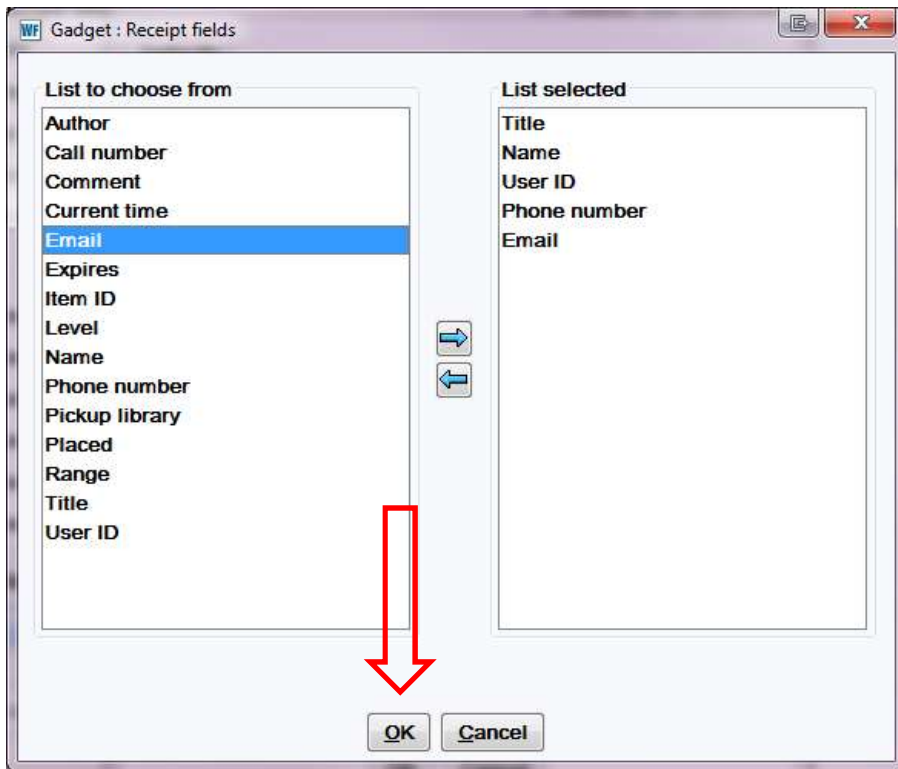
Many libraries include the following information on the hold slips:

- Name
- Title
- User ID
- Phone Number
- Email

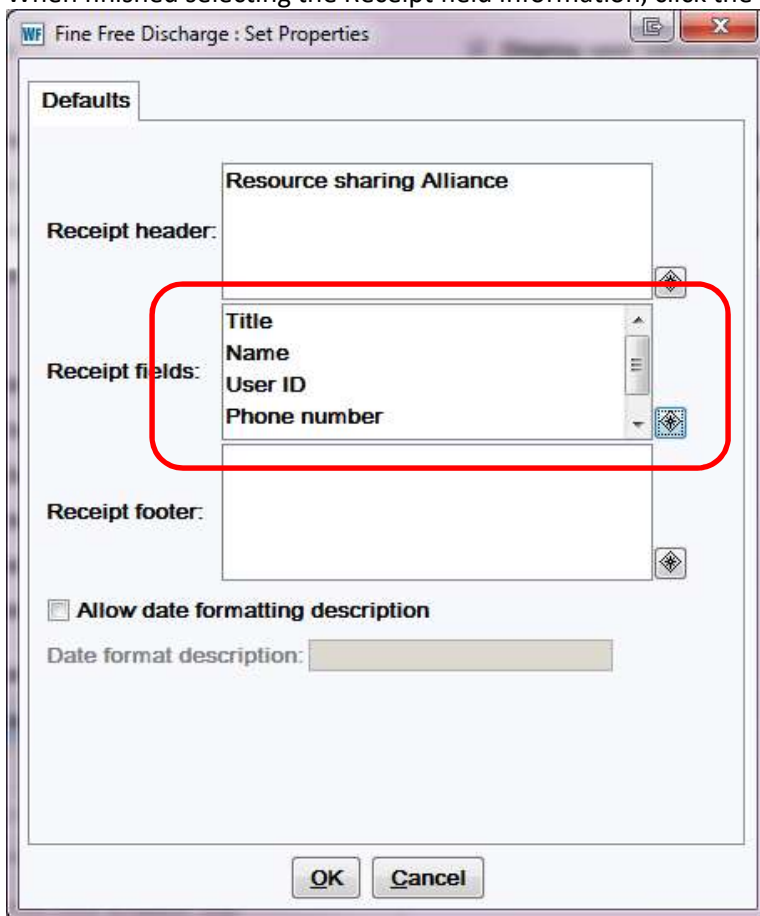
We understand that these hold slips may be how many libraries label holds. If you are including PII such as name, User ID and contact information on available hold slips, these slips should be removed and securely disposed of before the items are placed on any publically accessible shelf, given to the patron, or transited to another library.

If you are able to process your hold materials without including patron information on these receipts, we encourage you to remove it from your hold slips.

You may select other information from the list to include on your receipt.




When finished selecting the Receipt field information, click the OK button.

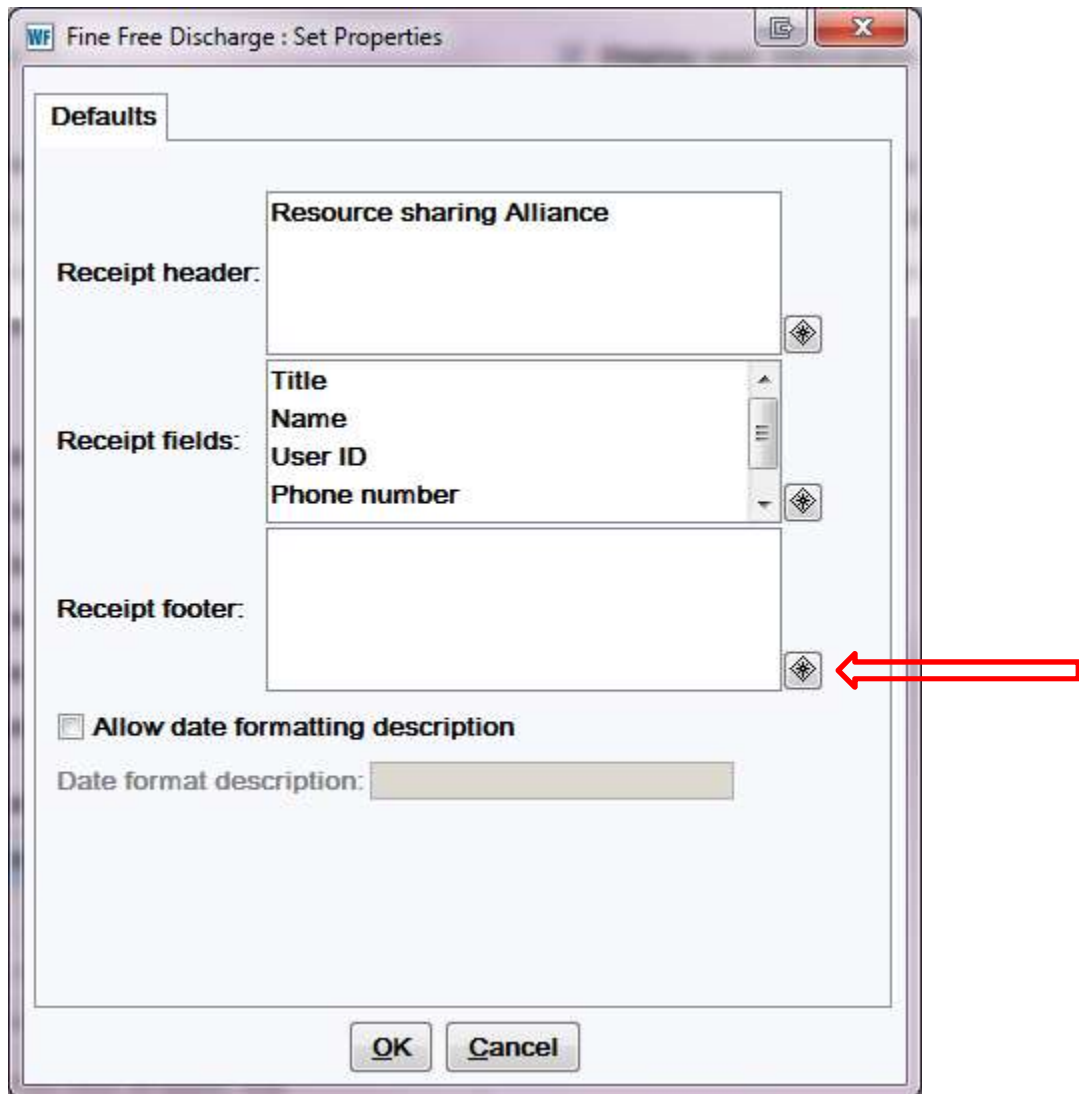


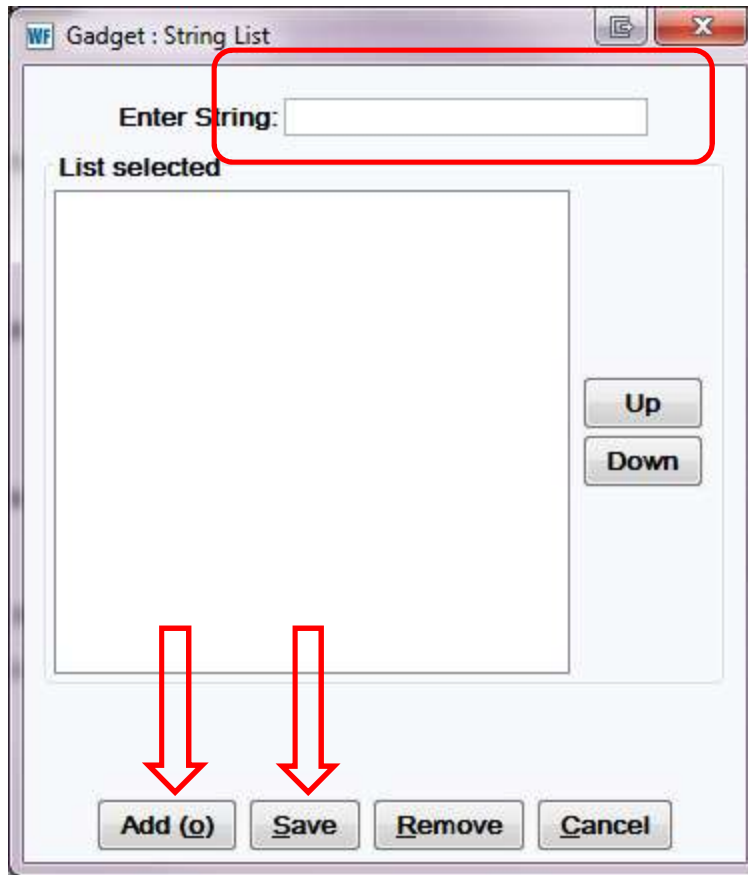
The information added to the receipt fields will appear in the Receipt fields display box on the Set Properties popup box.

❖ Receipt Footer

Receipt Footer (Optional) : *Since hold slips are used internally you may choose not to enter information into the receipt footer. If you are not entering information into the Receipt footer skip the receipt footer setup.*

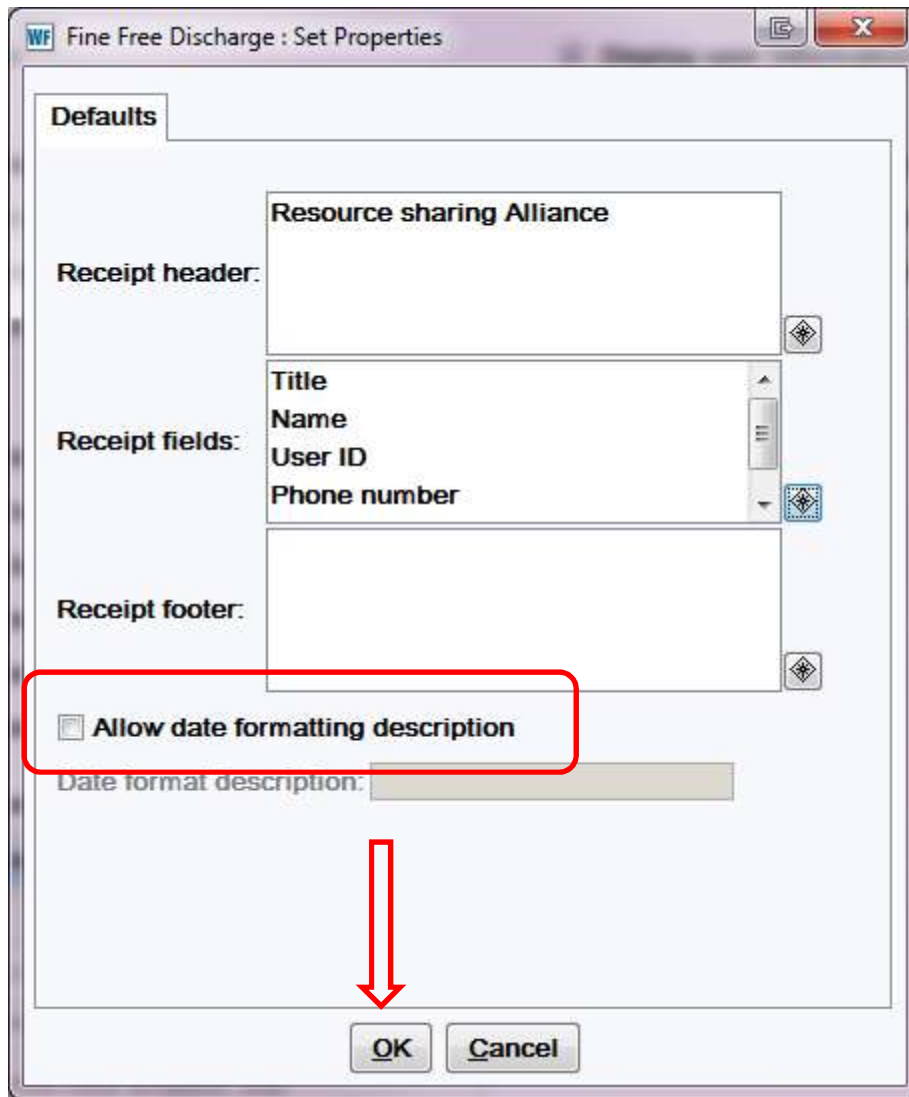
Click the gadget  to the right of the Receipt Footer box to enter information that will appear on the bottom of the receipt.





Enter the information into the Enter String box and click the Add button on the bottom of the Gadget: string List box

The information added to the Receipt Footer will appear in the List Selected display box. When you have finished adding the receipt header information click the Save button on the bottom of the Gadget: string list popup box.



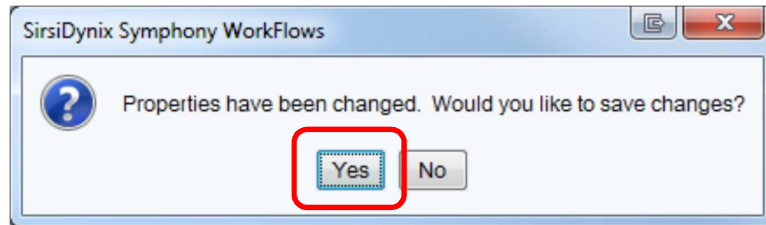
(Optional): Date formatting supplies text on the receipt to explain the date format your library uses

12/14/2015
Month/Day/Year

When you have finished configuring the Available Hold Slips click the OK button on the bottom the CheckOut: Set Properties pop up box.

You must close the Supervisor session of WorkFlows to save the Available Hold Slips configurations.

When you close this session of WorkFlows you will receive the following popup box:



Click "Yes" to save the settings.

The Available Hold slips will be available the next time you log into WorkFlows using the CIRC or your assigned cataloging login.

Don't forget to back up your Sirsi folder which will now contain the receipt configuration. Instructions for backing up your Sirsi folder can be found on the RSA web page.

How to Back Up the Workflows Configuration Folder on Windows 7:
<http://alsrsa.org/client/search/asset/3503>

The backed up Sirsi folder can be used to:

- Transfer settings from one computer to another
- Load configured settings onto a new computer

Instructions on replacing the Sirsi folder or transferring the folder to another computer can be found on the RSA web page.

How to Replace the WorkFlows Configuration Folder on Windows 7:
<http://alsrsa.org/client/search/asset/4346>

Questions?? Contact Martha at:
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