Resource Sharing Alliance NFP
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Receipt Configuration – Date Due Slips

Revised February 2023

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 Print date due slips receipts.

- CheckOut wizard
- Renew User wizard
- Renew Item wizard
- Ephemeral wizard
- Offline Module: Checkout wizard

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.

Log into WorkFlows using the supervisor login to configure receipts.

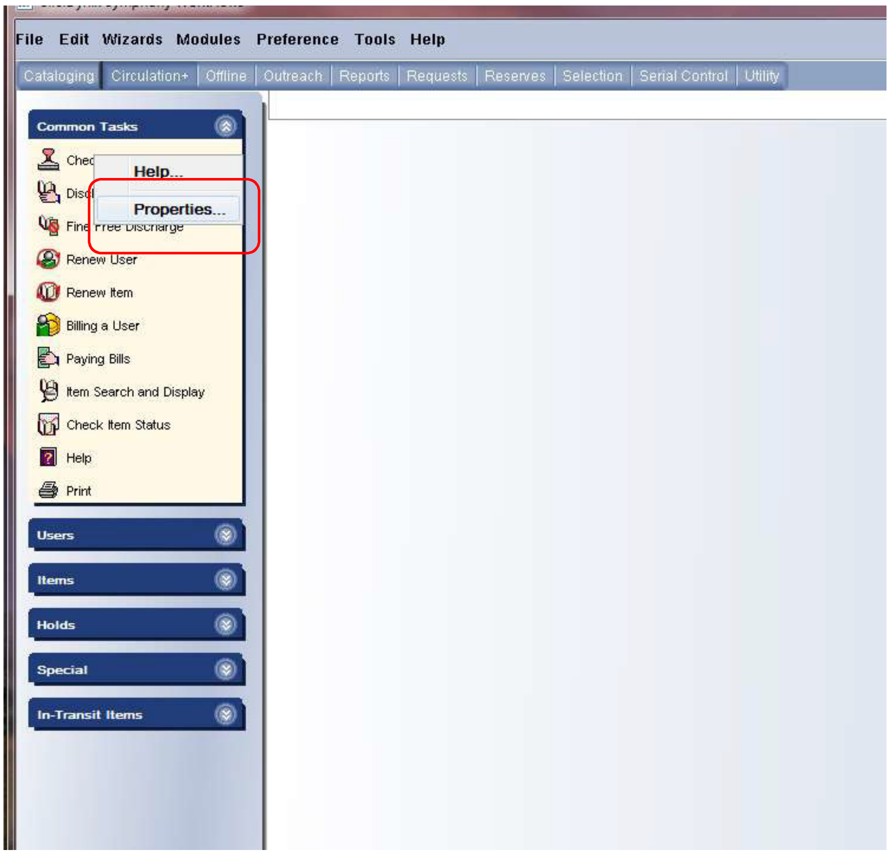
Logging into WorkFlows using the Supervisor login:

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

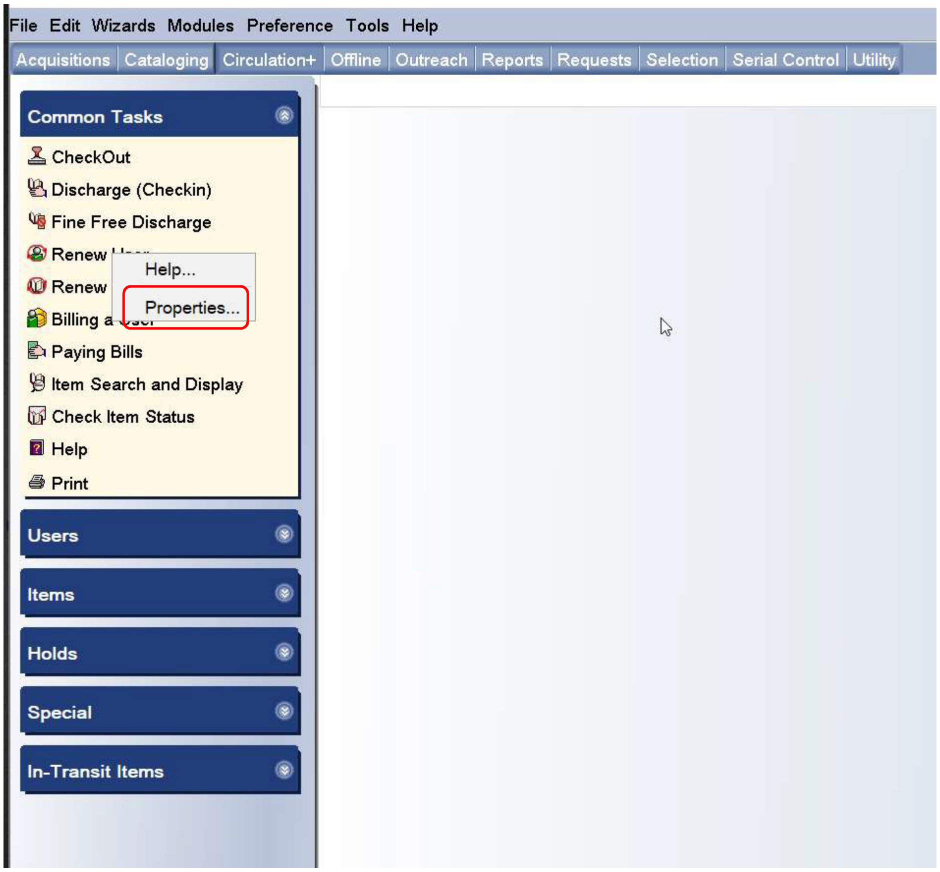
In the Circulation module:

- 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.

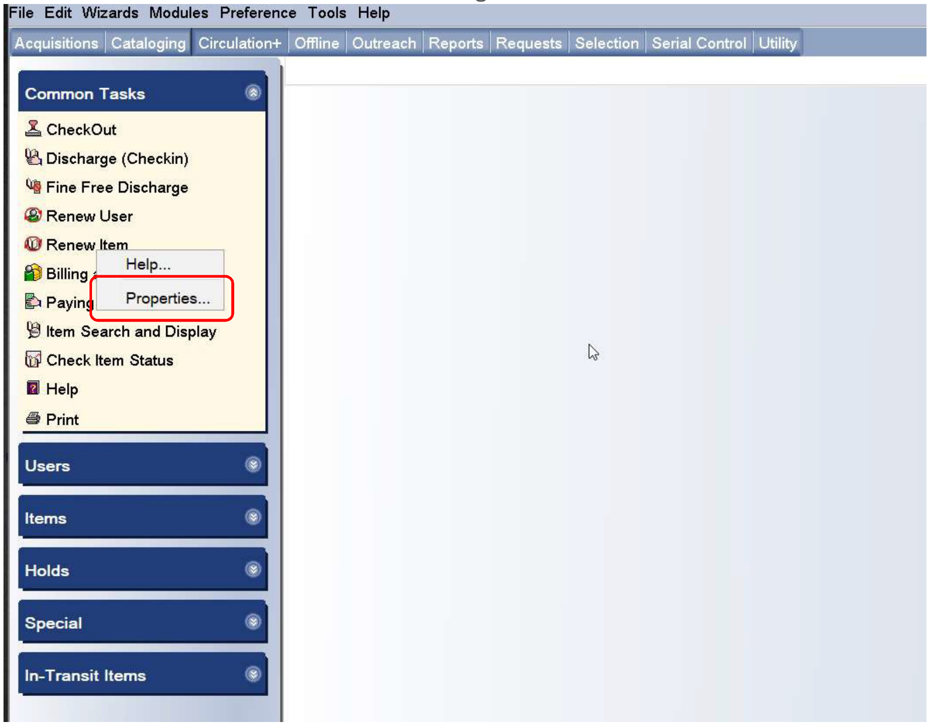
CheckOut Wizard:



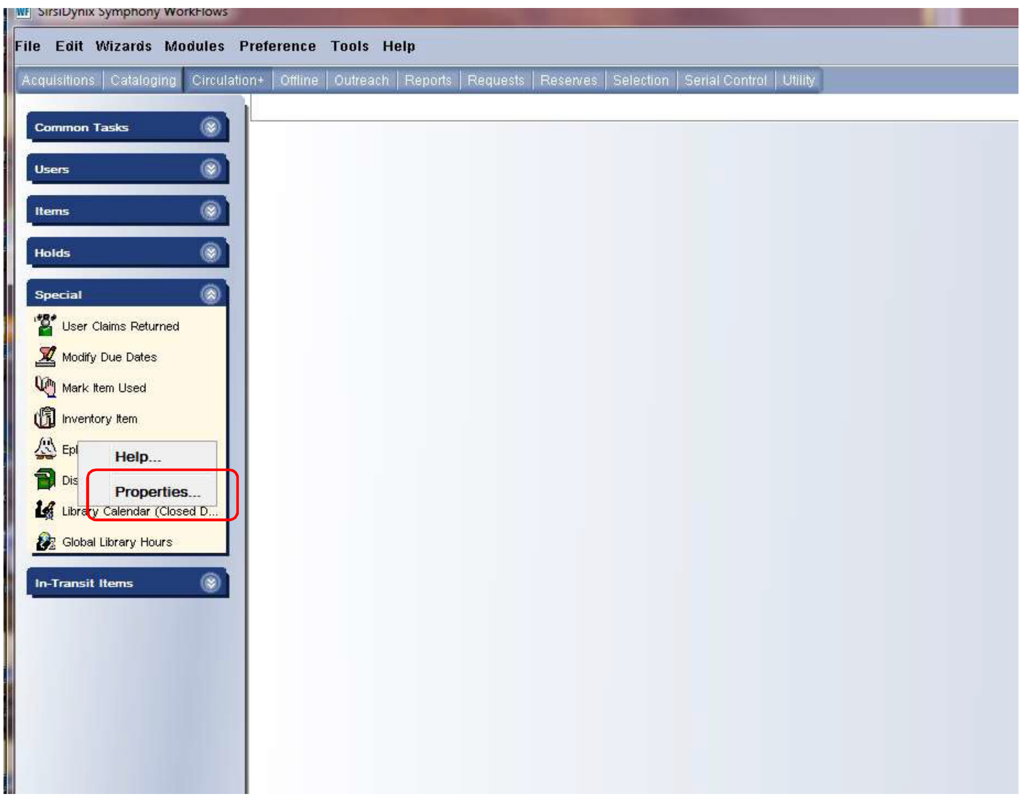
Renew User wizard:



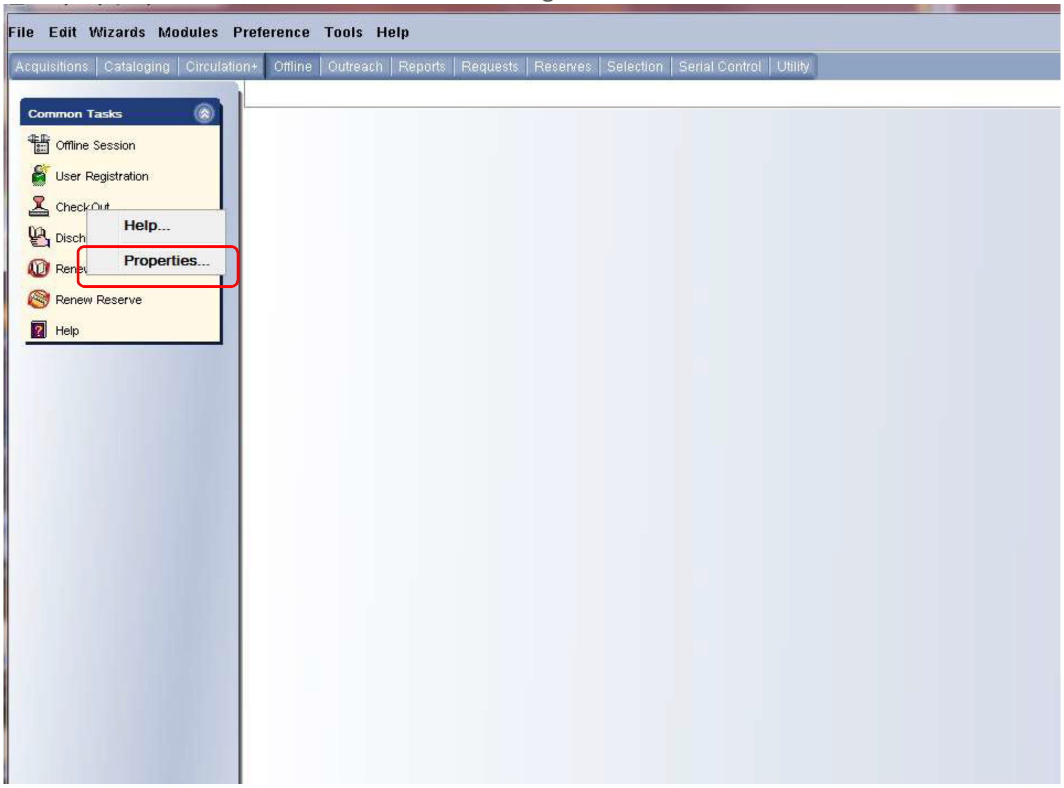
Renew Item wizard:



Ephemeral Wizard:



Offline Module: CheckOut Wizard

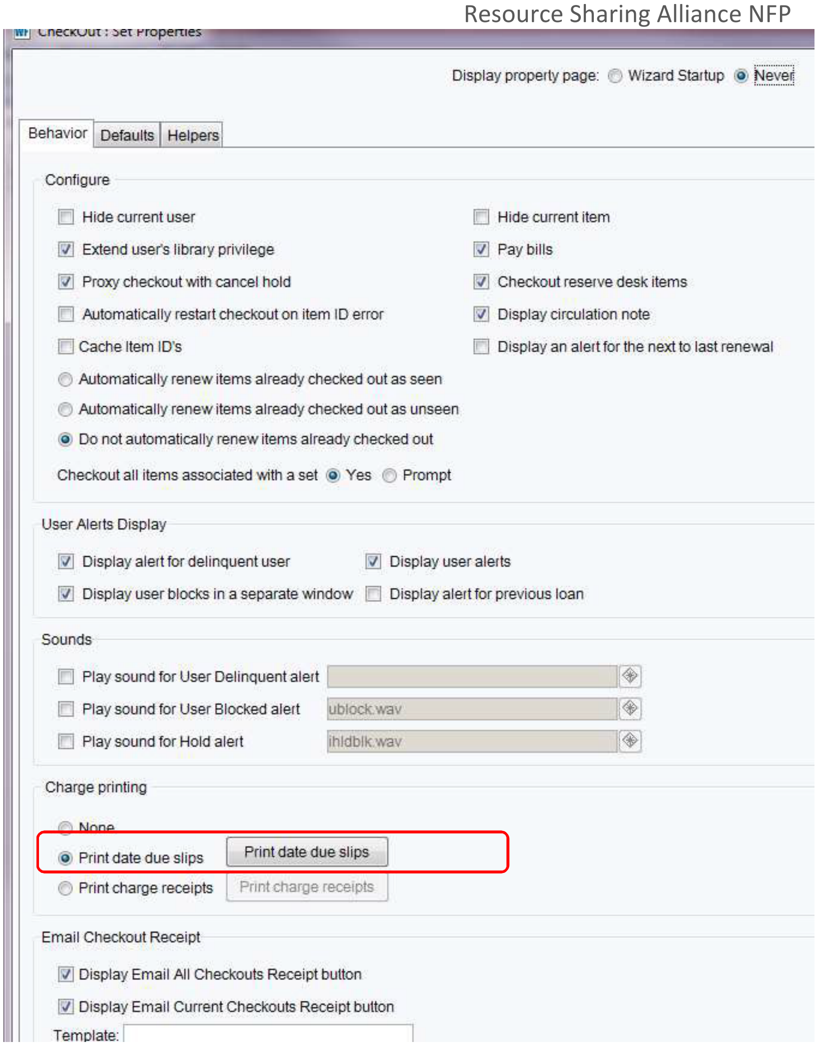


Receipt (Date due slips)

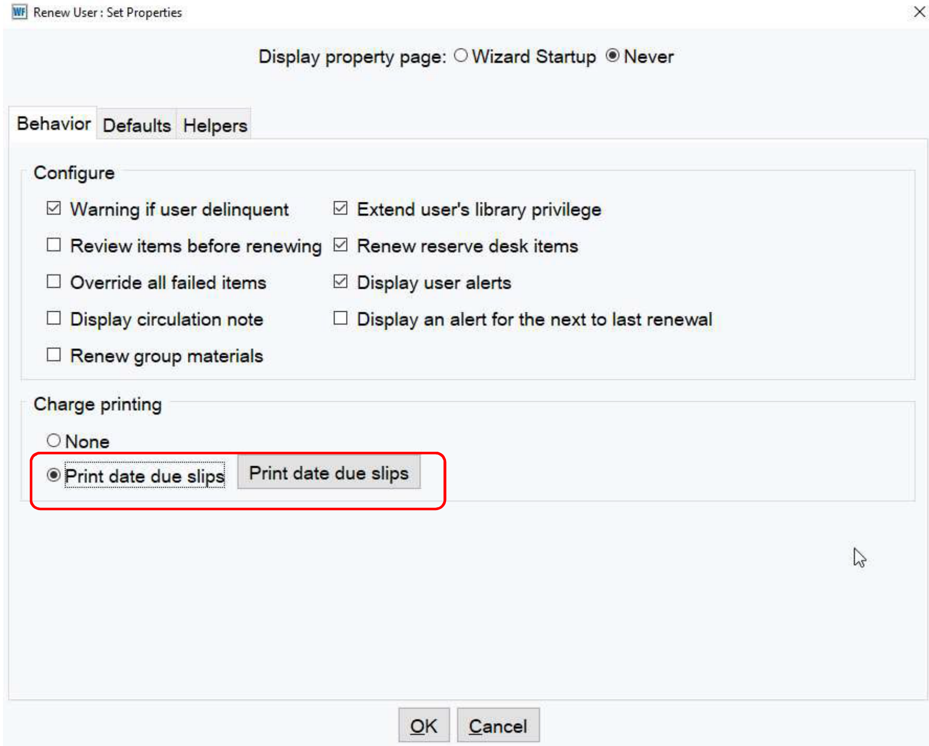
The Set Properties popup box will have a radio button labeled Print date due slips on the Behavior tab.

Make sure the radio button is selected and click on the Print date due slips bar to the right.

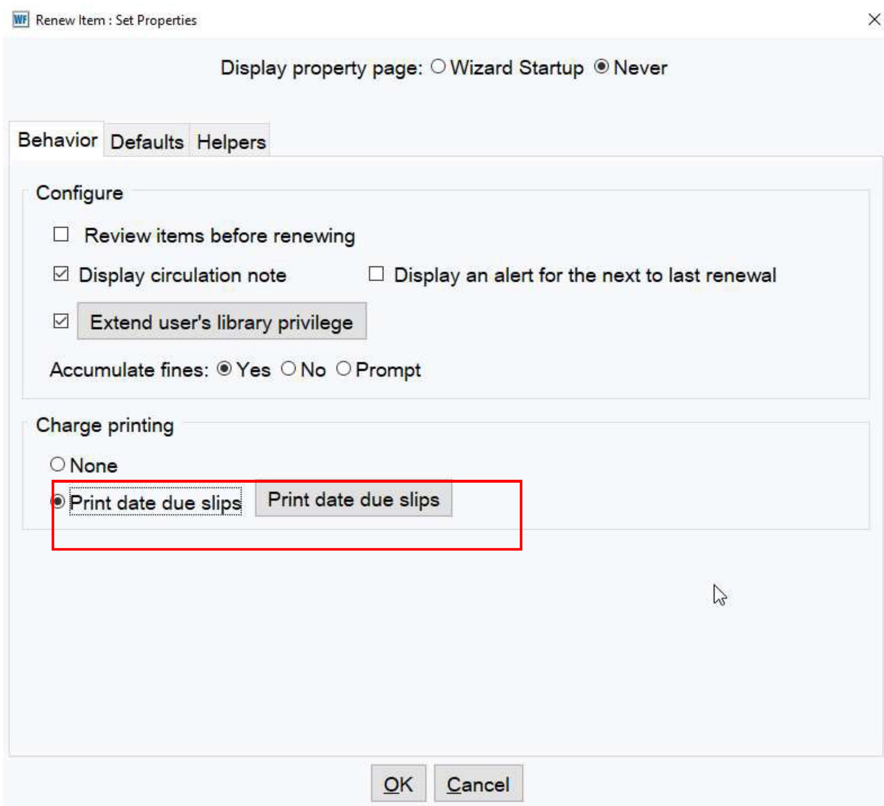
CheckOut wizard:


CheckOut : Set Properties
Display property page: Wizard Startup Never
Behavior
Defaults
Helpers
Configure
Hide current user
Hide current item
Extend user's library privilege
Pay bills
Proxy checkout with cancel hold
Checkout reserve desk items
Automatically restart checkout on item ID error
Display circulation note
Cache Item ID's
Display an alert for the next to last renewal
Automatically renew items already checked out as seen
Automatically renew items already checked out as unseen
Do not automatically renew items already checked out
Checkout all items associated with a set Yes Prompt
User Alerts Display
Display alert for delinquent user
Display user alerts
Display user blocks in a separate window
Display alert for previous loan
Sounds
Play sound for User Delinquent alert
Play sound for User Blocked alert
ublock.wav
Play sound for Hold alert
ihldblk.wav
Charge printing
None
Print date due slips
Print date due slips
Print charge receipts
Print charge receipts
Email Checkout Receipt
Display Email All Checkouts Receipt button
Display Email Current Checkouts Receipt button
Template:

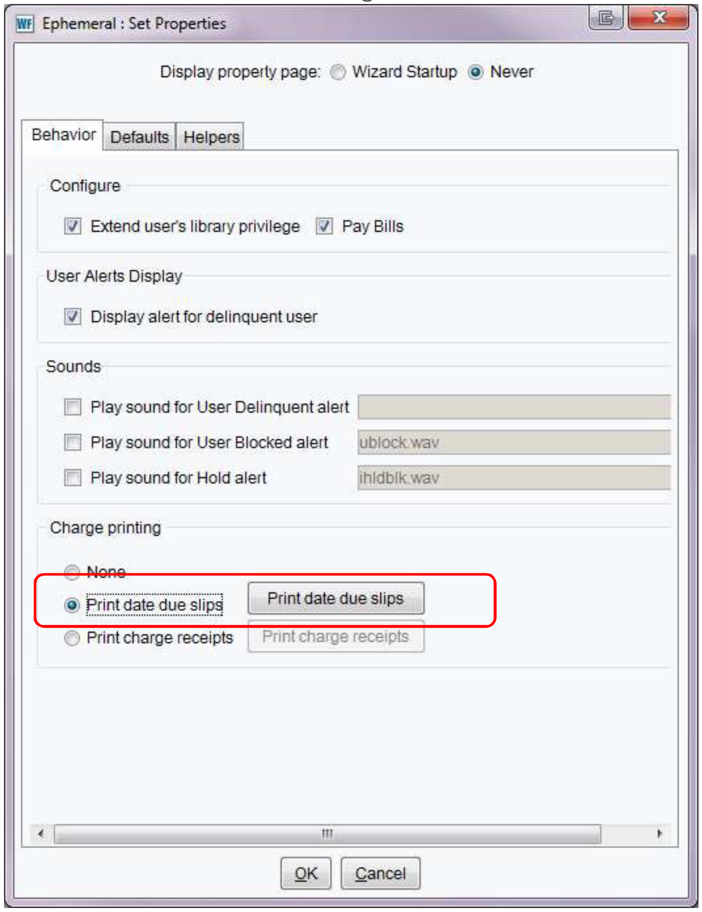
Renew User:



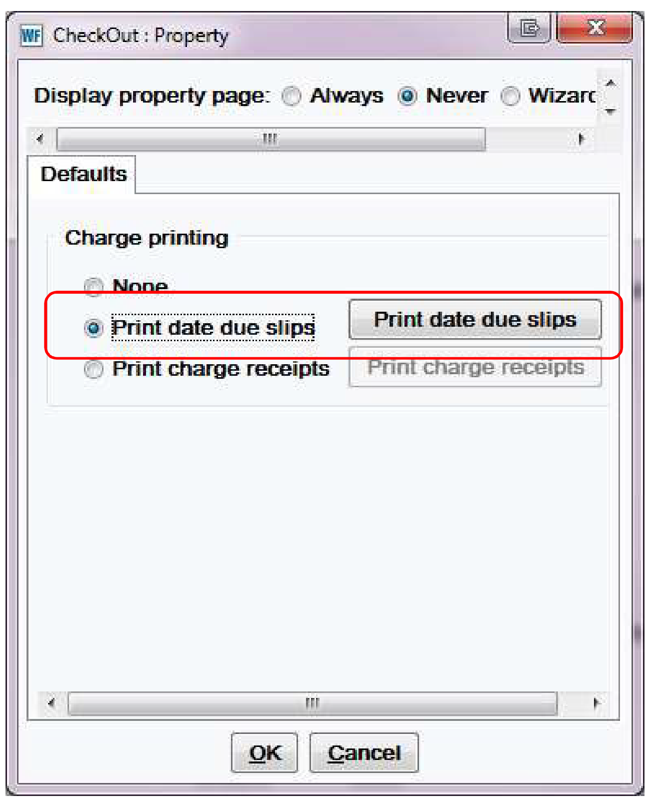
Renew Item:



Ephemeral Wizard:

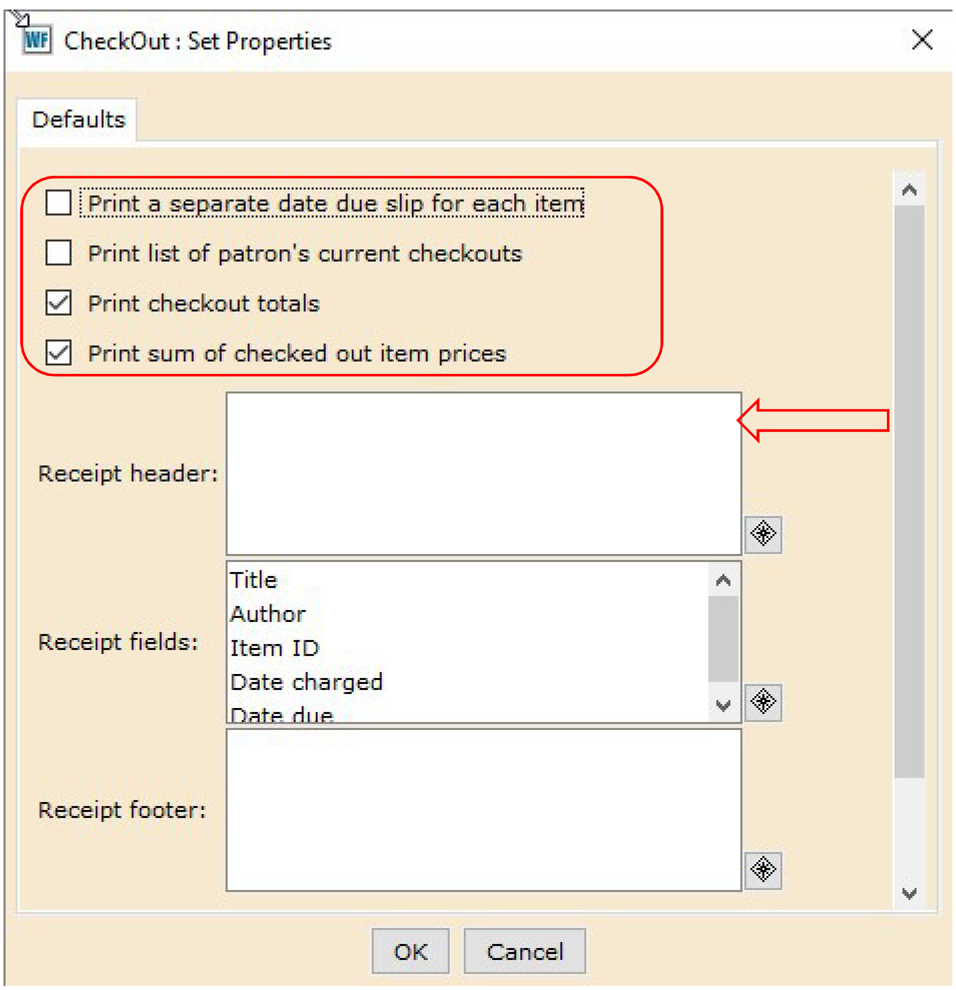


Offline Module: CheckOut wizard:



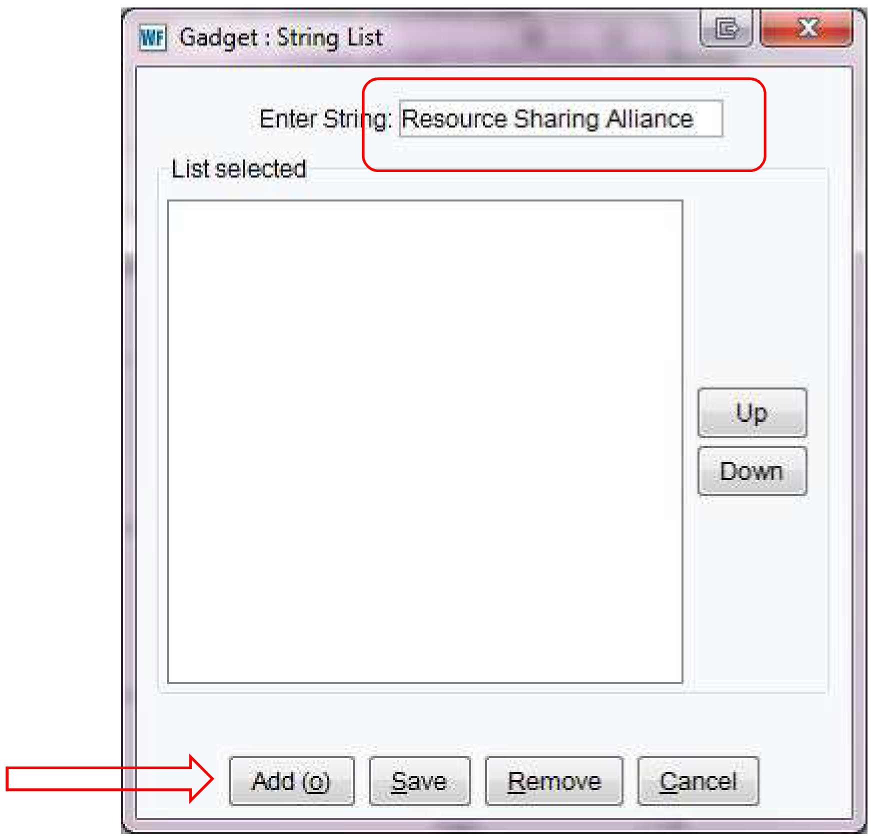
The CheckOut: Set Properties box will pop up.

- Print date due slips: Prints a date due slip during checkout
    - Print a separate date due slip for each item (CheckOut wizard only):
      During the checkout session a separate date due slips is printed for each item the patron checks out.
    - Print list of patron's current checkouts (CheckOut wizard only):
      Prints a list of all items the patron has currently checked out. This list include previously charged items still out on the patron's account
    - Print checkout totals (CheckOut wizard only):
      Prints a count of items checked out and total count of current items checked out.
    - Print sum of checked out item prices (Checkout wizard only):
      Prints the price of each item checked out and a sum of the total value of items checked out.
      System text reads: "By using the library today you saved: $x.xx"



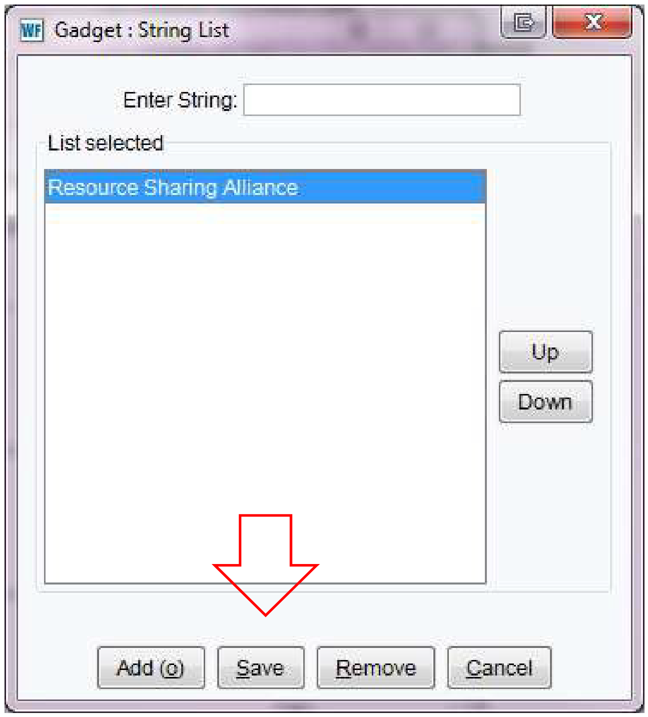
❖ Receipt Header:

Click the gadget to the right of the Receipt Header box to enter information that will appear on the top of the receipt. (See previous page)
The most common entry is the library name.

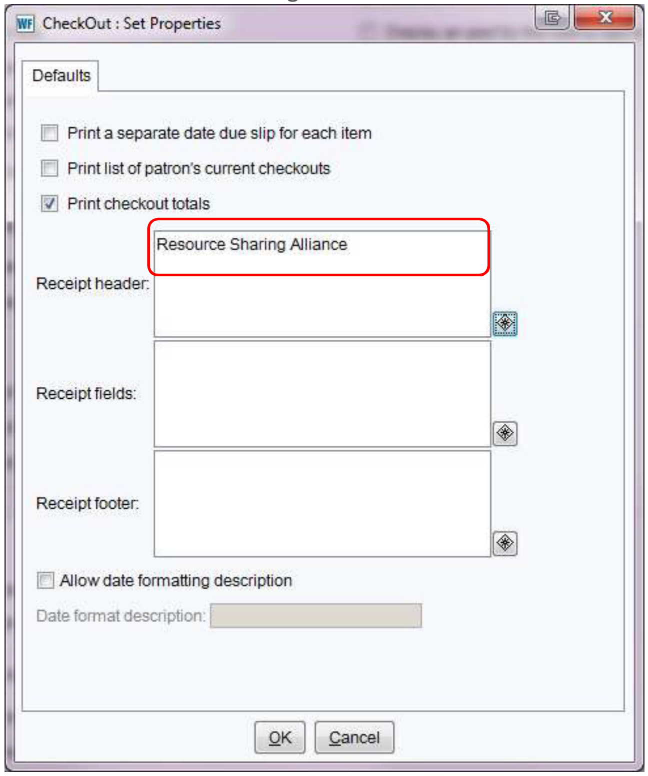


- Enter the information into the Enter String box and click the Add button on the bottom of the Gadget: string List box

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.



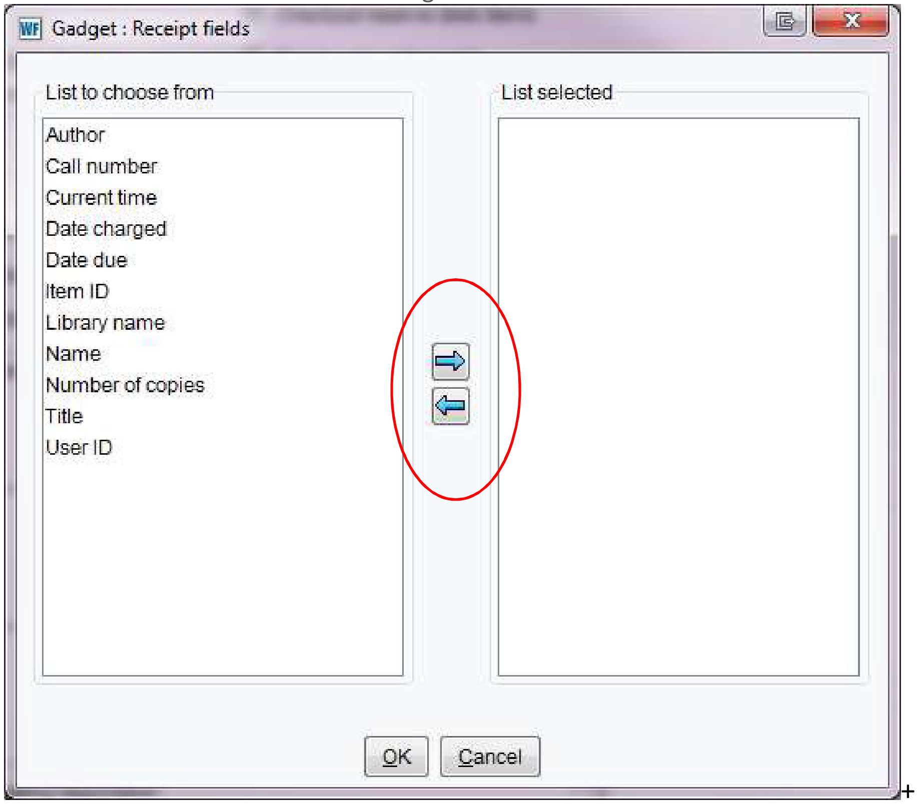
The information added to the Receipt Header will appear in the List Selected display box. When you have finished adding the receipt header information click the Save button on the bottom of the Gadget: string list popup box.



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.

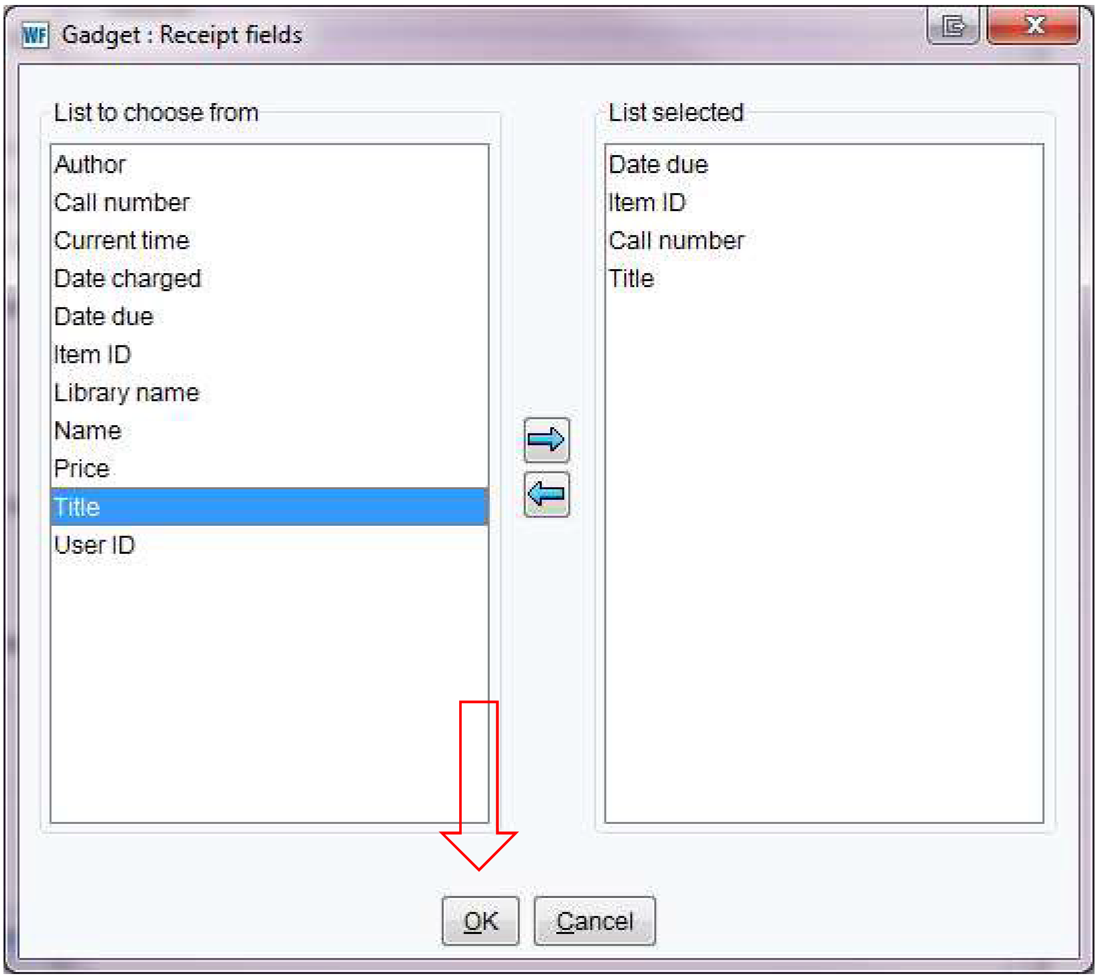


Using the arrows in the middle of the Gadget: receipt fields popup box move the information to be include on the receipt from the “List to choose selection” list on the left to the “List selected box” on the right.

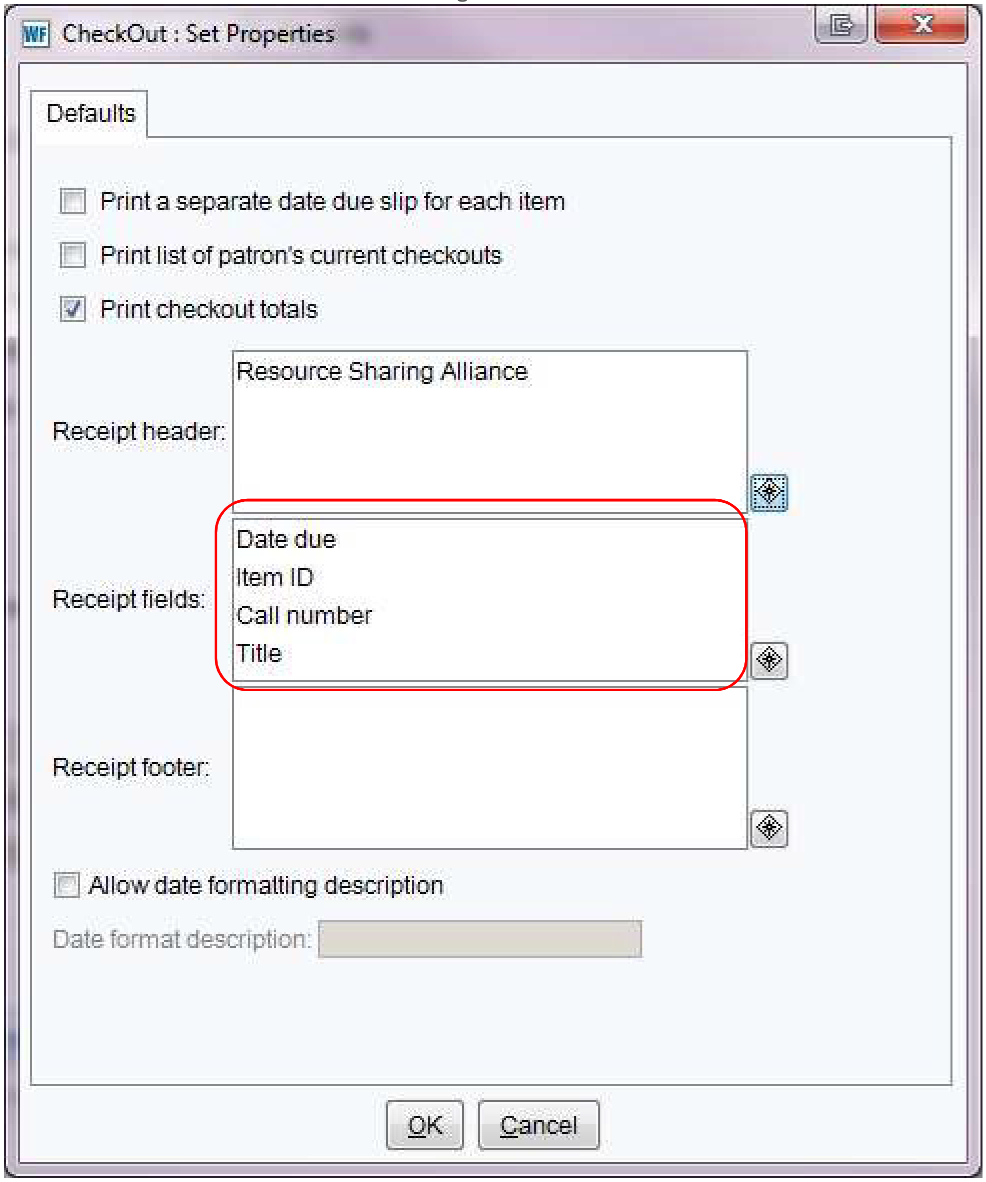
The suggested minimum information to include on the receipt is:

Date Due
Item ID
Call Number
Title

You may select other information from the list to include on your receipt. Be sure you consider patron privacy when making your selections and do not include Name or User ID.



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



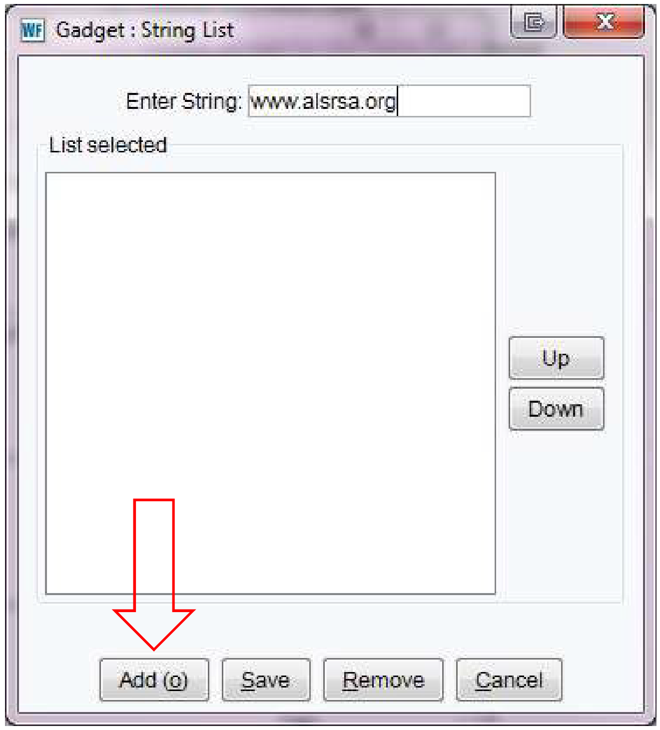
The information added to the receipt fields will appear in the Receipt fields display box on the Set Properties popup box.

- Receipt Footer

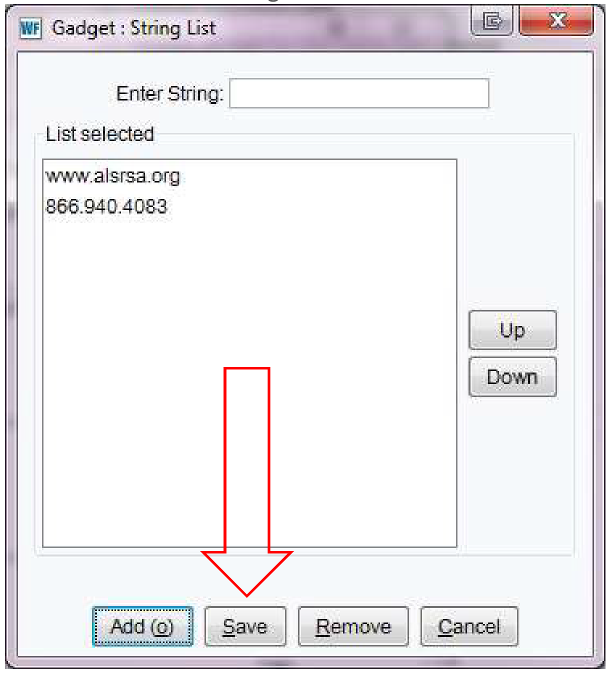
  Click the gadget to the right of the Receipt Footer box to enter information that will appear on the bottom of the receipt.

  Examples of information that could be added to the bottom of the receipt:

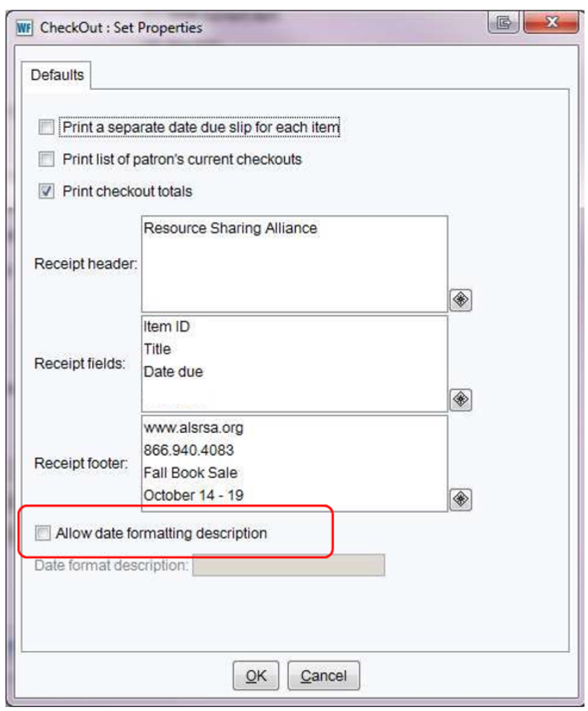
  Library website address
  Library telephone number
  Dates for story time registration
  Dates for the next book sale



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

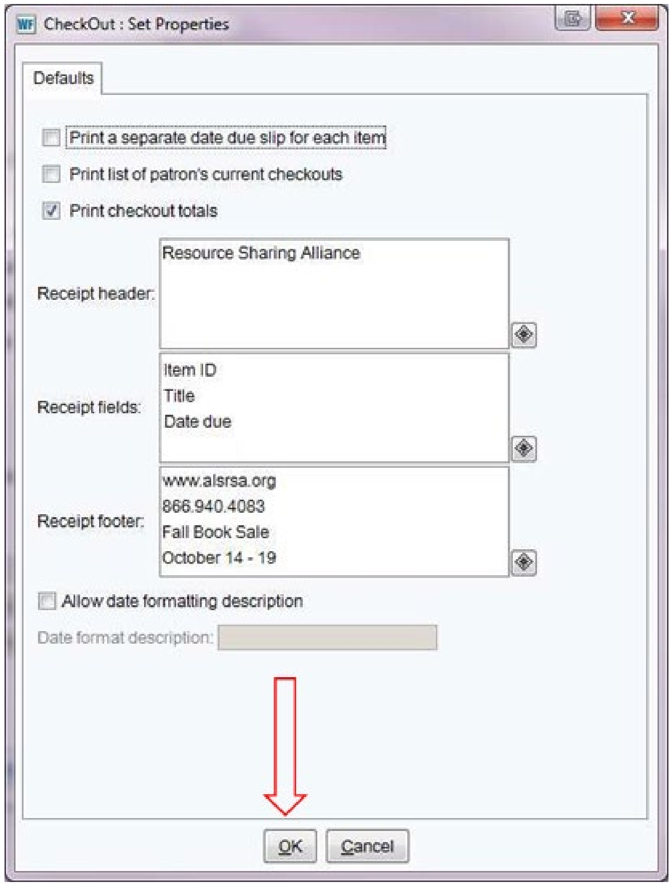


The information added to the Receipt Header will appear in the List Selected display box. When you have finished adding the receipt header information click the Save button on the bottom of the Gadget: string list popup box.



Date formatting supplies text on the receipt to explain the date format your library uses

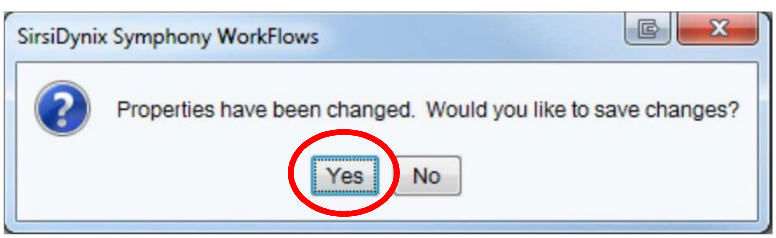
12/14/2015
Month/Day/Year



When you have finished configuring the Print date due slip option 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 Print date due slip configurations.

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



Click “Yes” to save the settings.

The Print Date Due slip will be available next time you log into WorkFlows using the TECH or CIRC login.

Don’t forget to back up your Sirsi folder which will now contain the receipt configuration. Instructions for backing up your Sirsi folder are available on the RSA web page.

How to Back Up the Workflows Configuration Folder on Windows 7:
http://alsrsa.org/client/search/asset/3503
How to Back Up the WorkFlows Configuration Folder on Windows 10:
http://alsrsa.org/client/search/asset/5683

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 are available on the RSA web page.

How to Replace the WorkFlows Configuration Folder on Windows 7:
http://alsrsa.org/client/search/asset/4346
How to Replace the WorkFlows Configuration Folder on Windows 10:
http://alsrsa.org/client/search/asset/5684

Questions??
Contact the RSA help desk at rsahelp@railslibraries.info or RSA staff at 866-940-4083