Receipt Configuration – Hold Wrapper Slip
Revised January 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.

Hold wrappers are slips of paper printed with user information that are placed around the spine of an item that is shelved on a self-service hold shelf.

These wizards contain the Hold Wrapper 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

Due to recent legal challenges, we do not recommend that libraries use full patron names on hold wrappers.

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

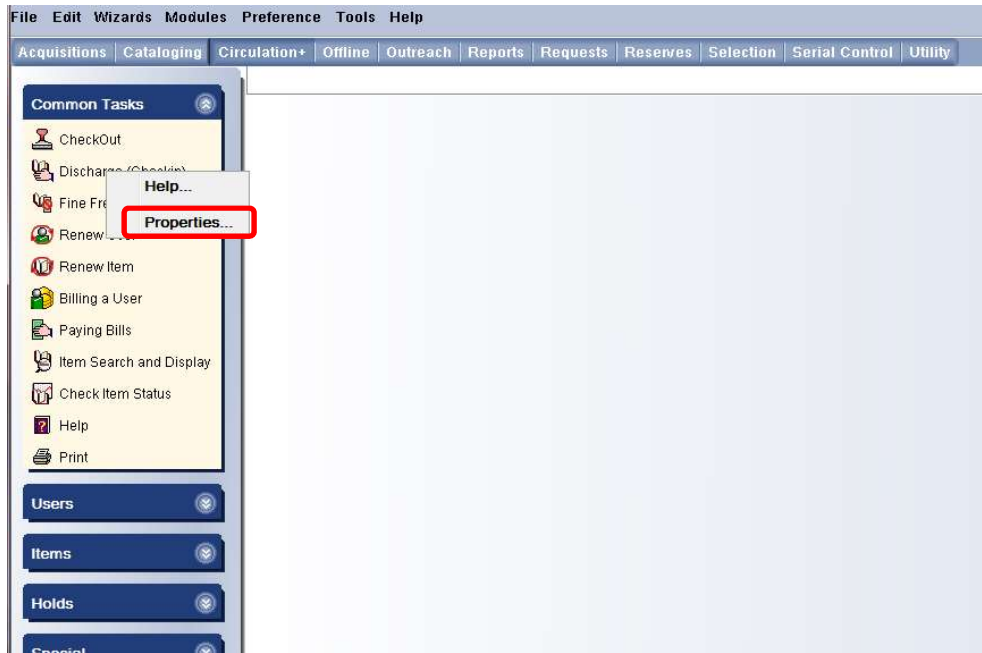Log into WorkFlows using the Supervisor login:
- • Enter your WorkFlows library name followed by SUPER. The pin is also SUPER. Example:
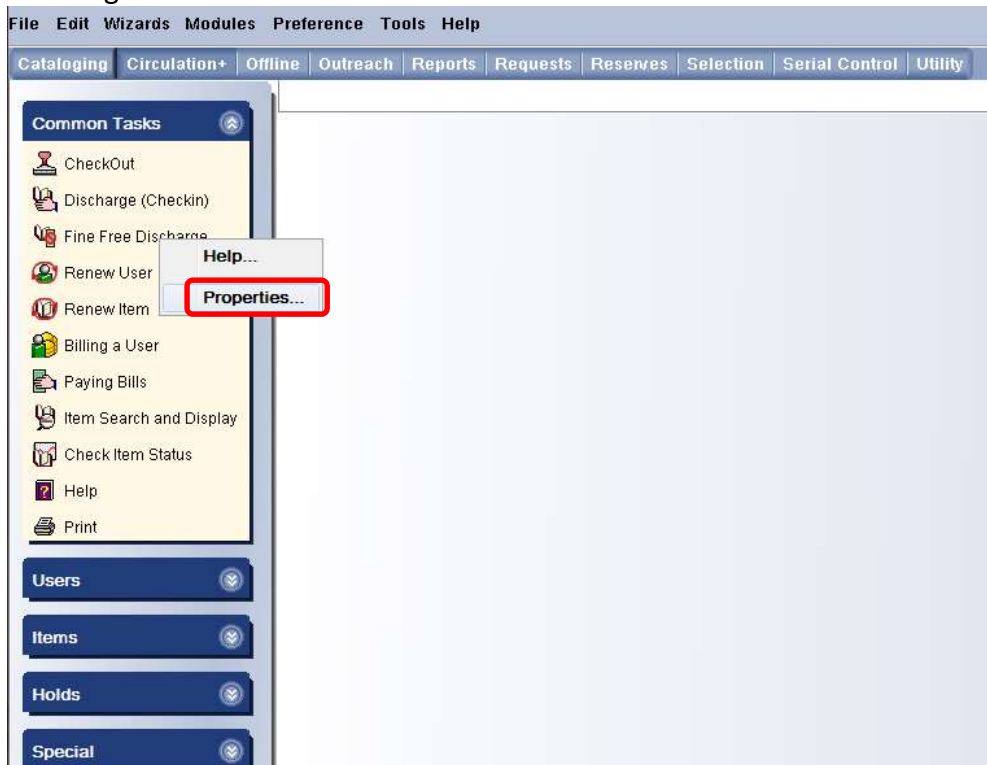
In the Circulation module:

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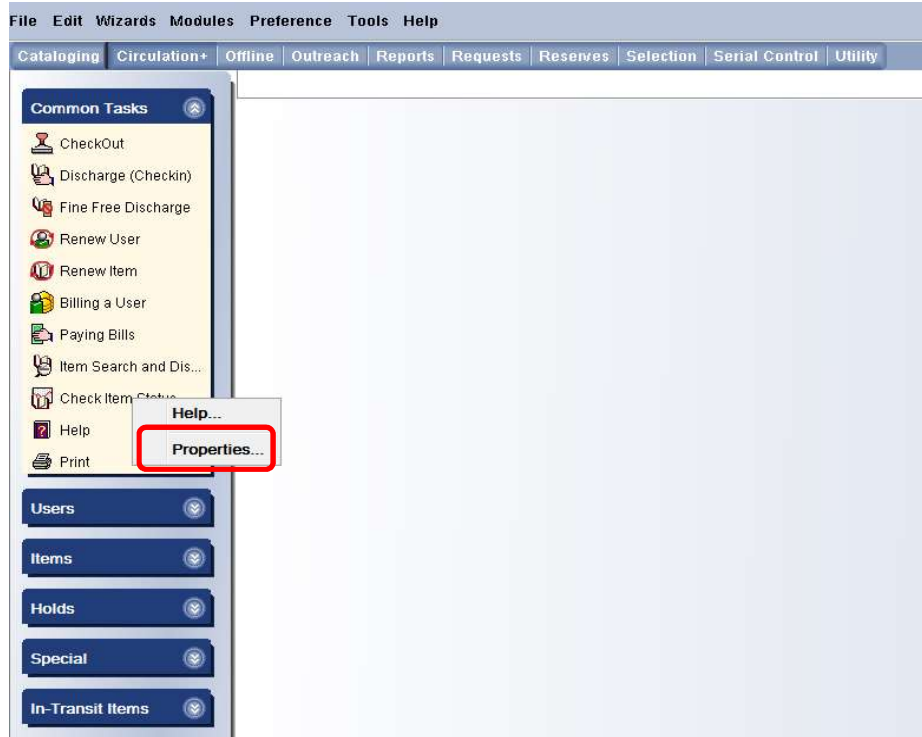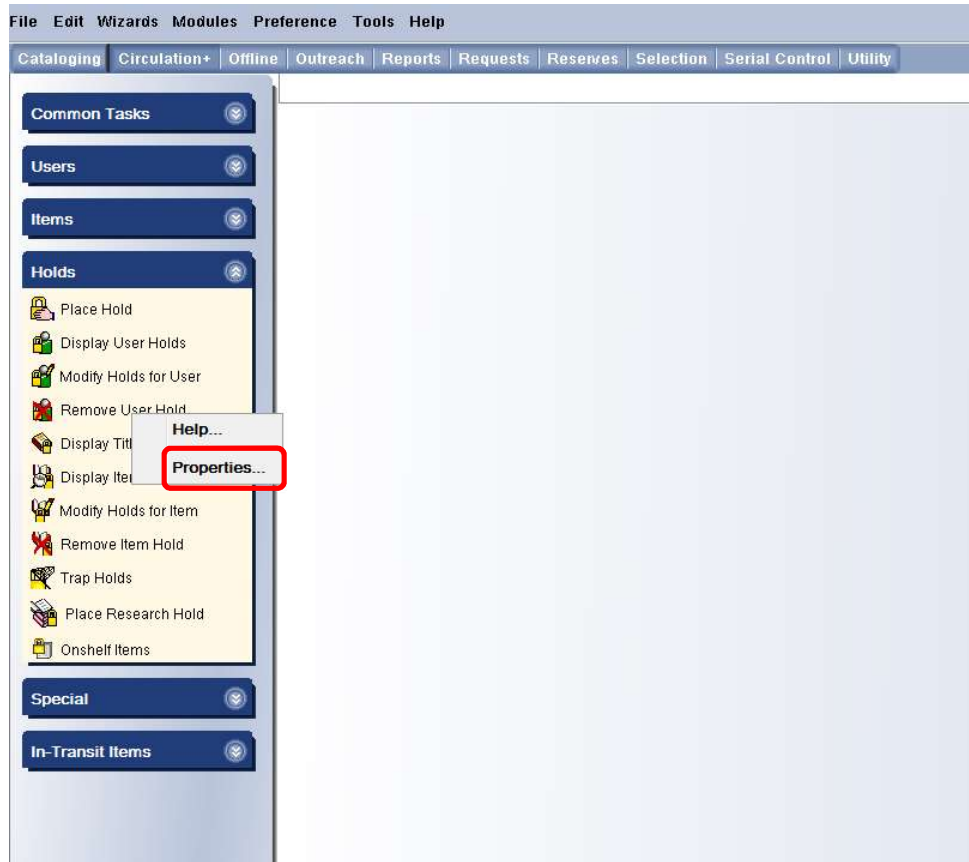- o Select Properties from the drop down menu.

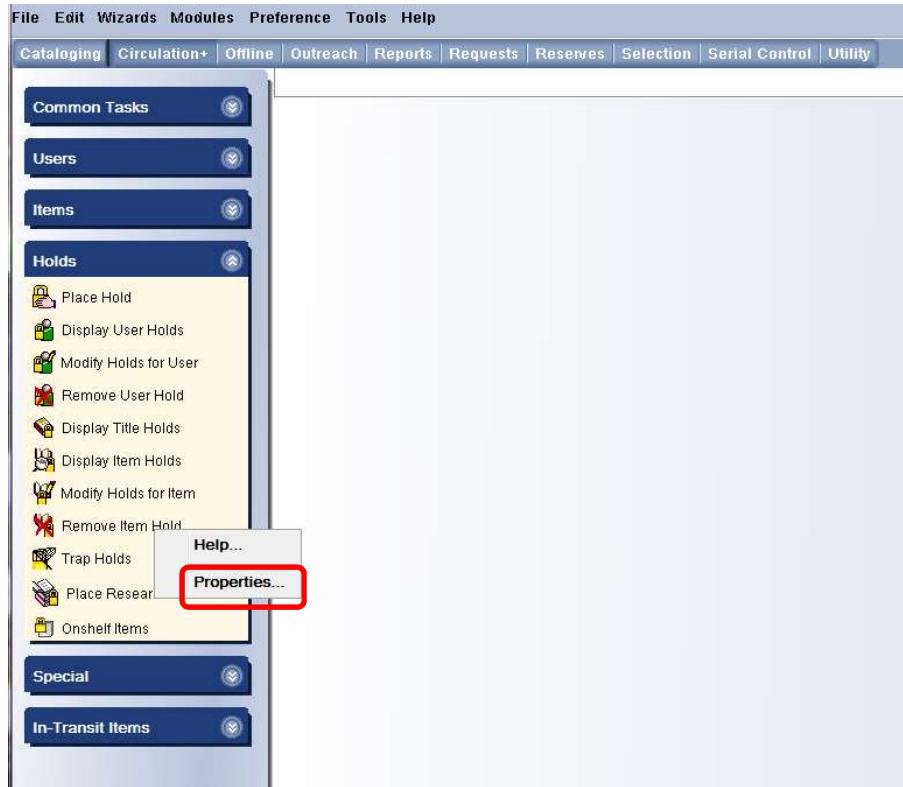Discharge wizard:

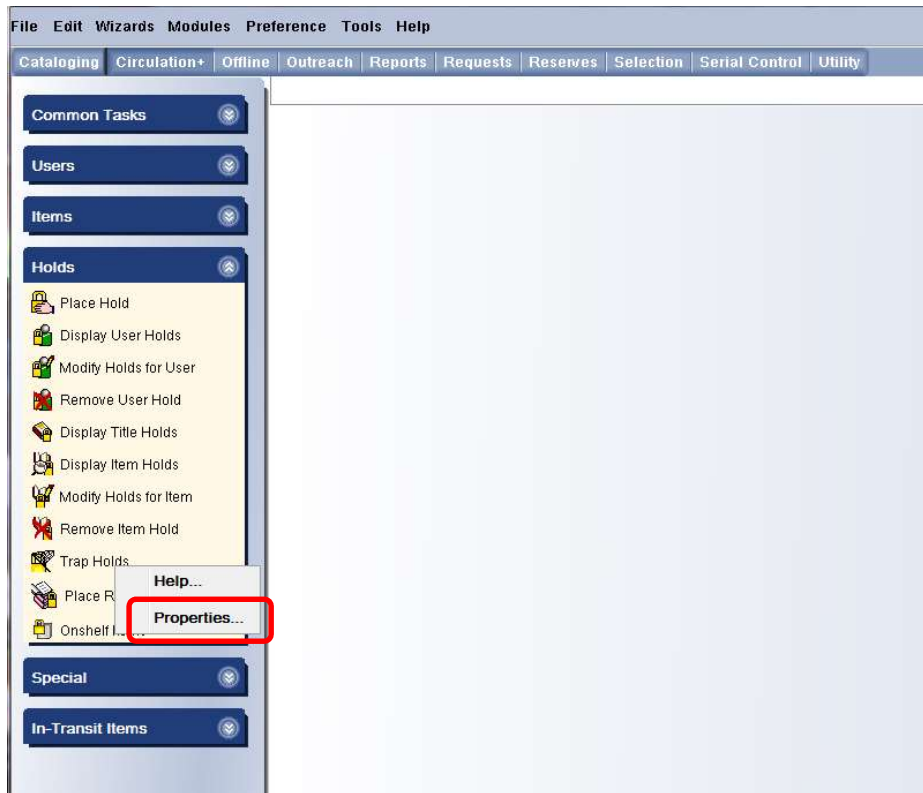Fine Free Discharge wizard:

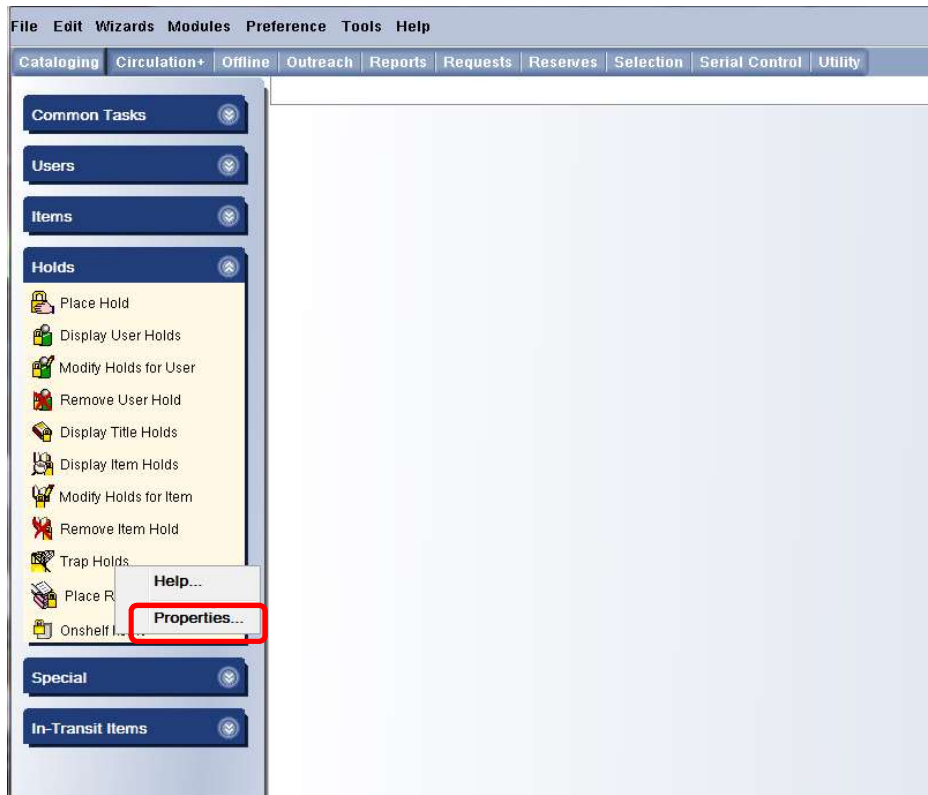Check Item Status wizard:

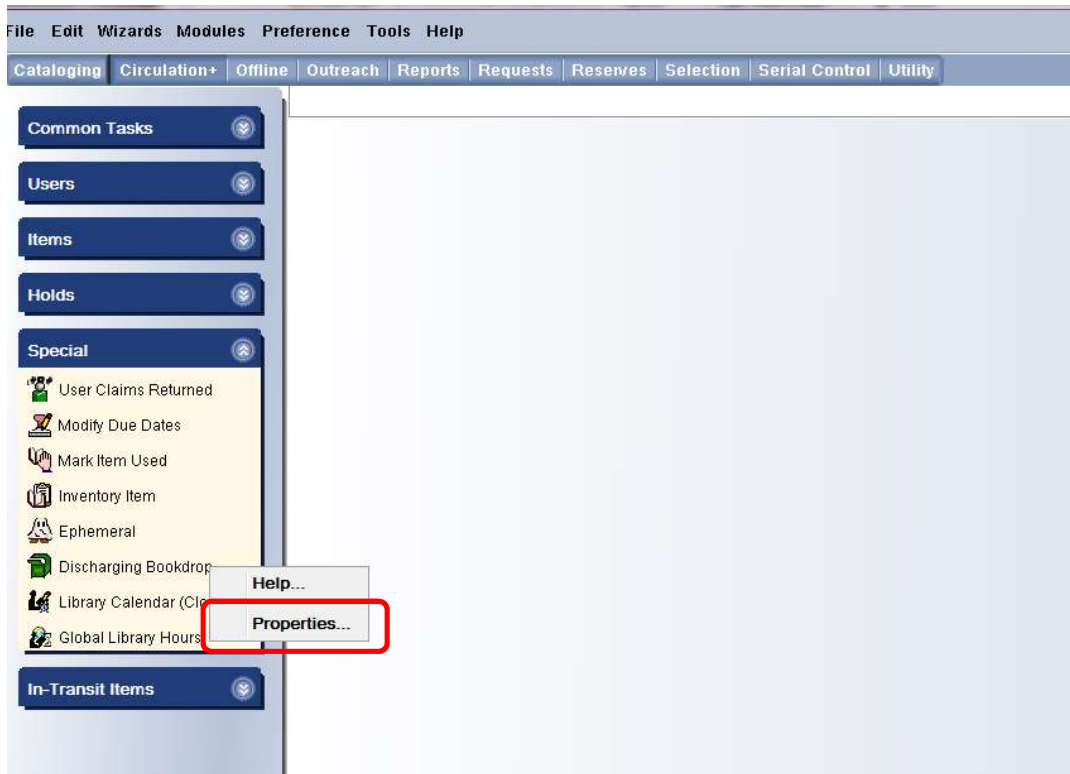Remove User Hold wizard:

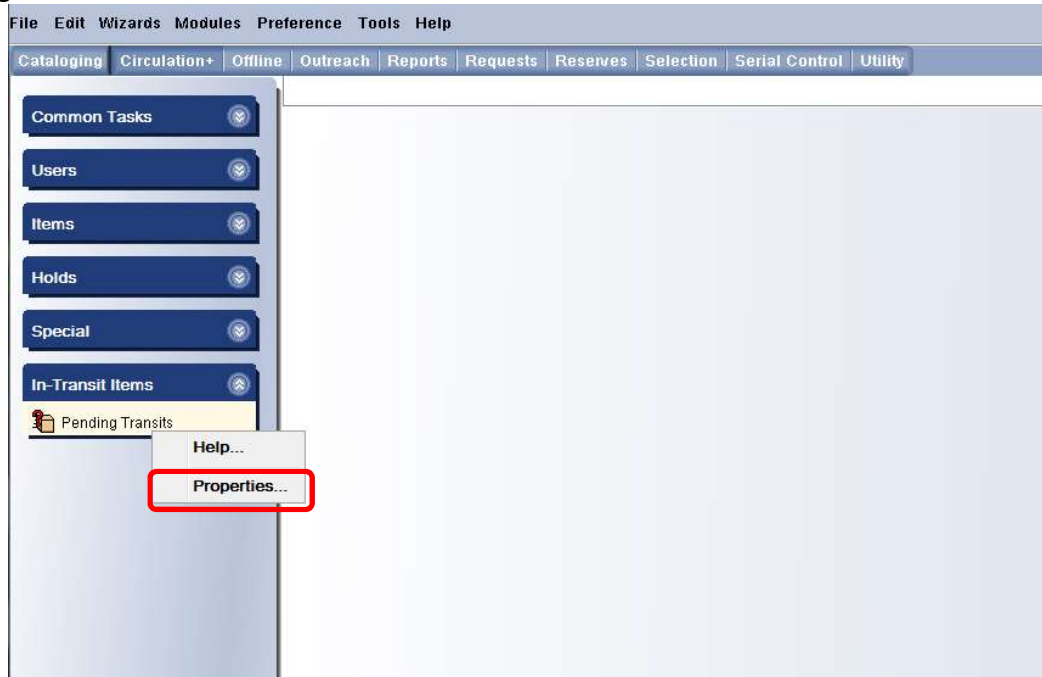Remove Item Hold wizard:

Trap Holds wizard:

Onshelf Items wizard:

Discharging Bookdrop wizard:

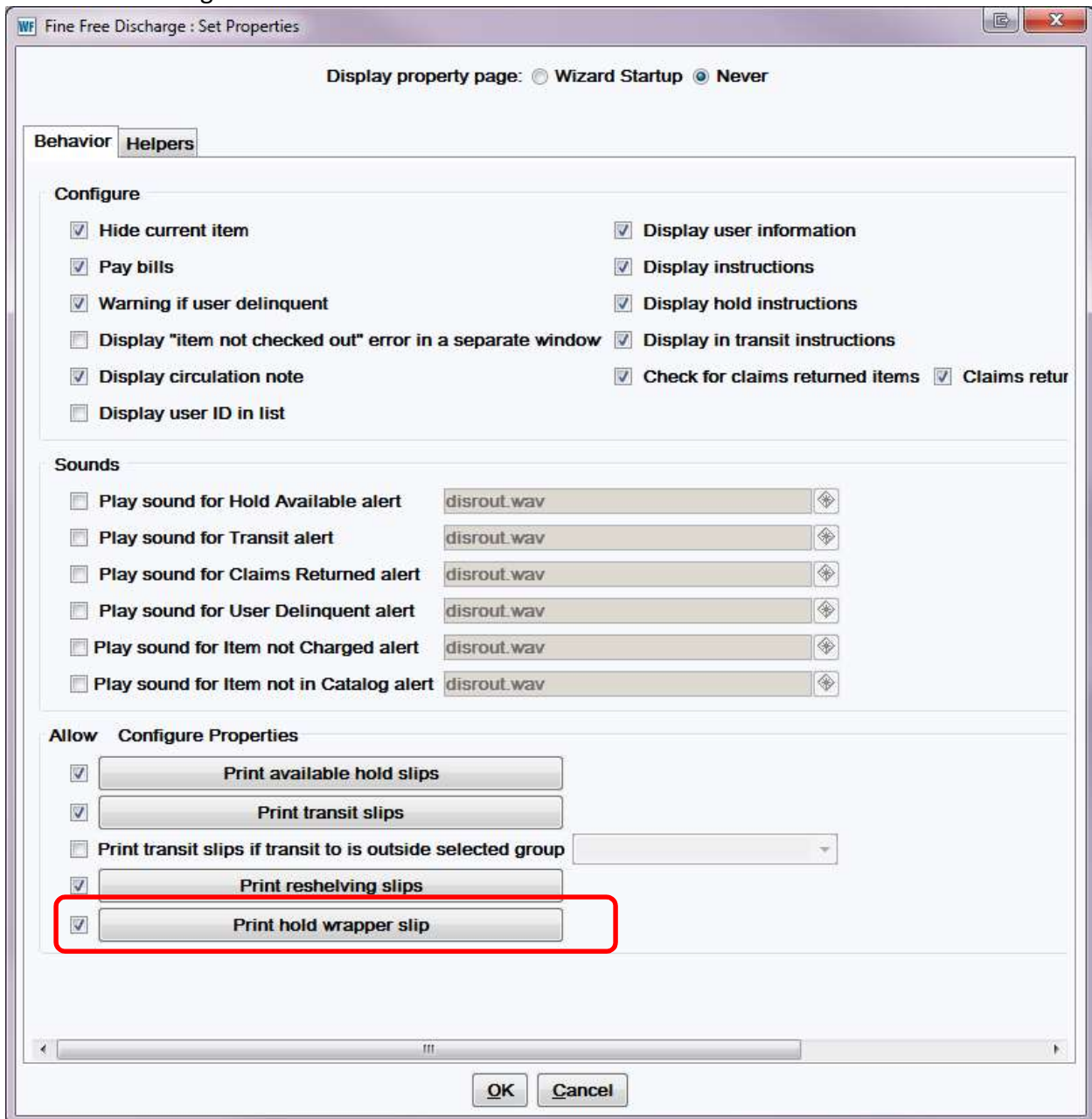Pending Transits wizard:

Receipt (Hold Wrapper)

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

Make sure the check box is selected and click the Print hold wrapper slips bar to the right of the checked box.
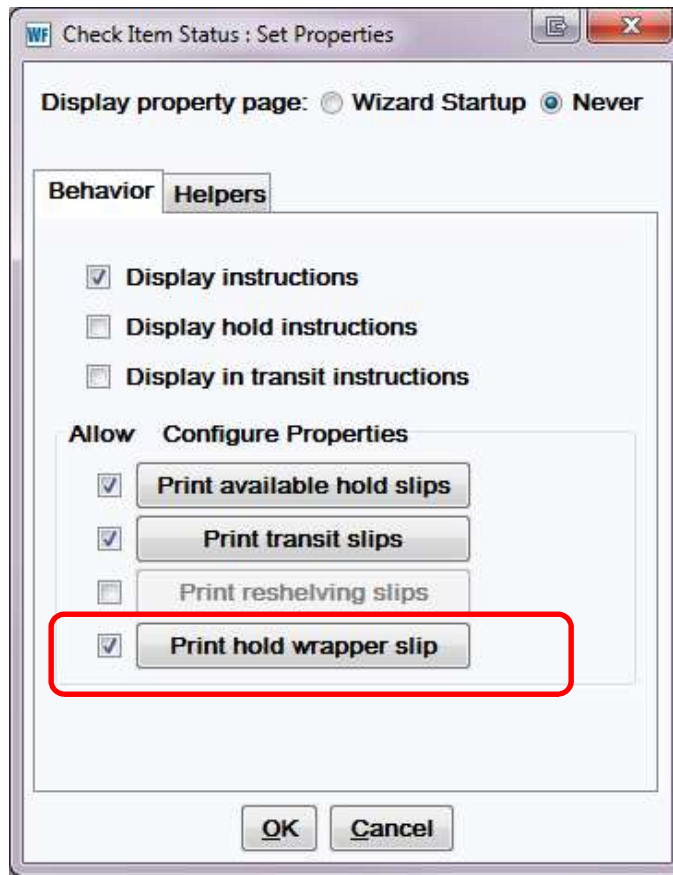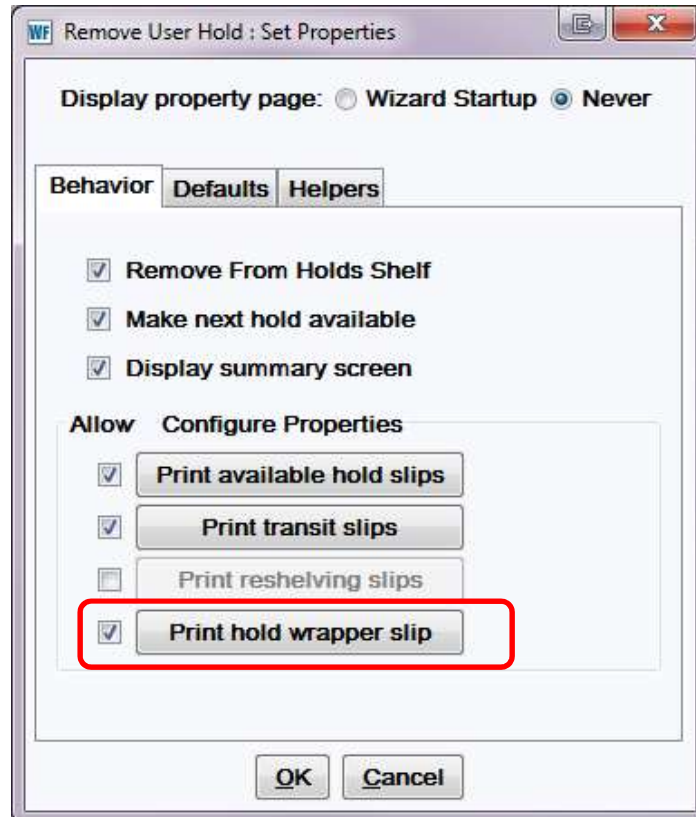
Discharge wizard:

Fine Free Discharge wizard.
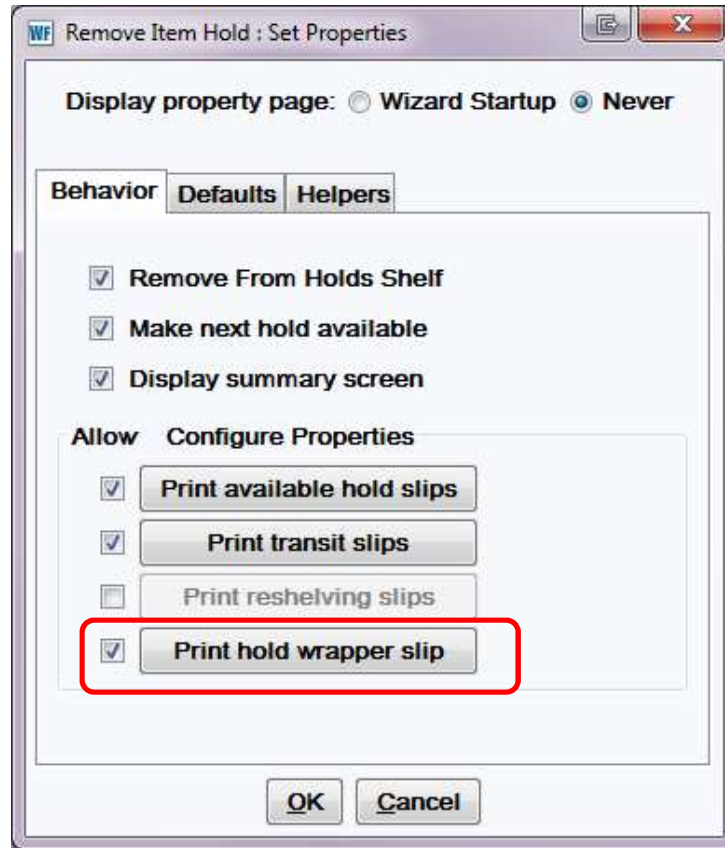
Check Item Status wizard:

Remove User Hold wizard:

Remove Item Hold wizard:

Trap Holds wizard:

Onshelf Items wizard:

Discharging Bookdrop wizard:

Pending Transits wizard:

The Set Properties box will pop up.

- ➢ Defaults tab:

    - ❖ **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.*

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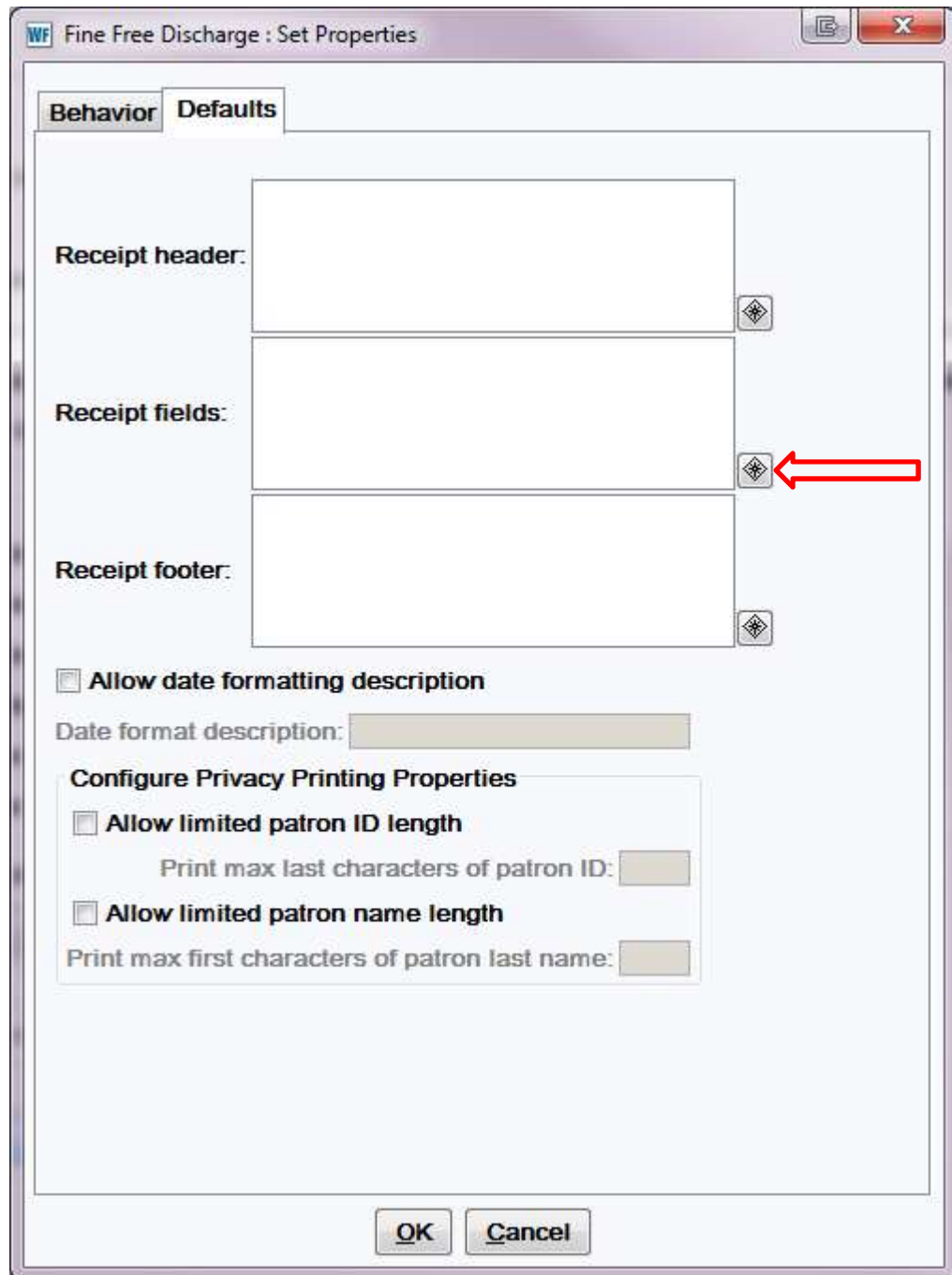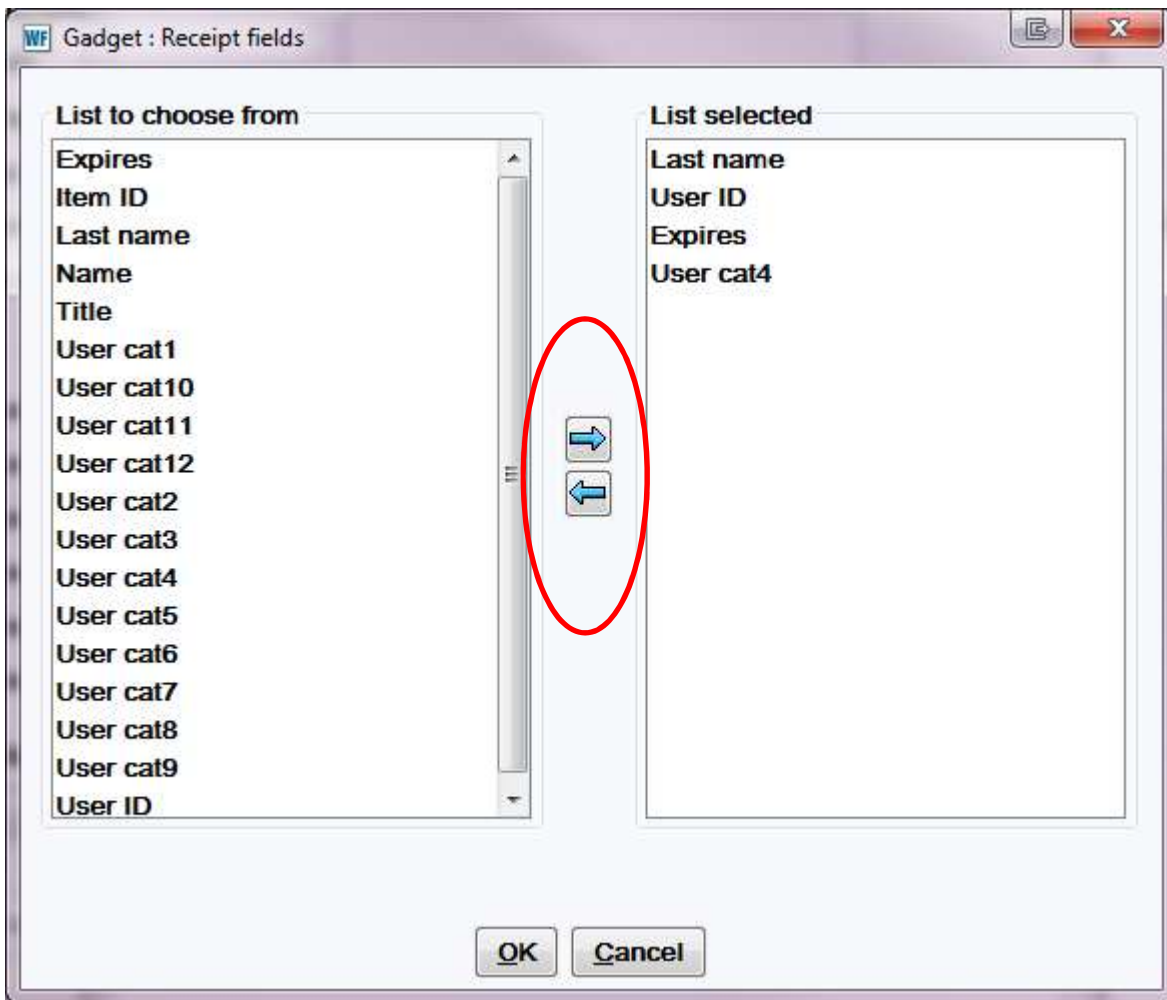
Use the arrows in the middle of the Gadget: receipt fields pop up box to move the information to be included on the receipt from the "List to choose selection" list on the left to the "List selected box" on the right.

Make sure to consider patron privacy when selecting information to include.

Due to recent legal challenges, we do not recommend that libraries use full patron names on hold wrappers.

Workflows allows libraries to print a hold wrapper with a truncated version of the user name and ID.

To do this, select Last Name and User ID as receipt fields.
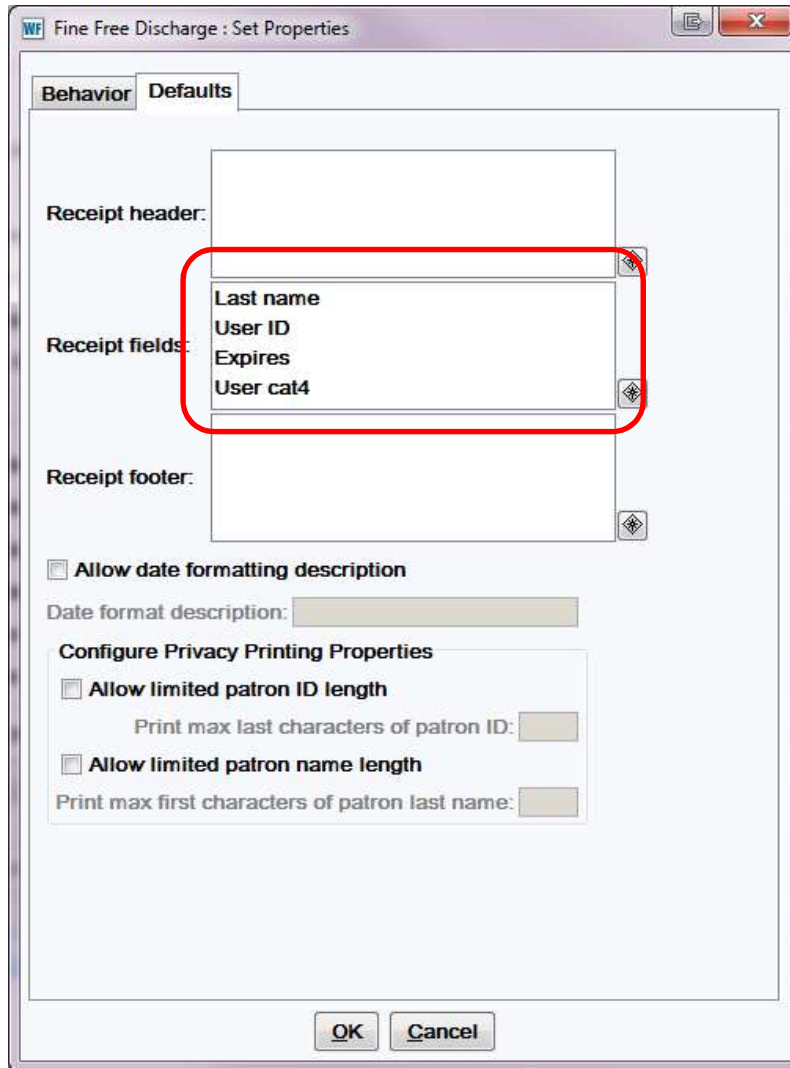
The information added to the receipt fields will appear in the Receipt fields display box on the Set Properties popup box.

Then, under Configure Privacy Settings, check the box next to "Allow limited patron ID Length." Once you do this, "Print max last characters of patron ID," will no longer be grey, and you can enter a number. This will set the number of digits from the end of the patron's ID that will print.

Next, check the box next to "Allow limited patron name length." Once you do this, "Print max first characters of patron last name," will no longer be grey and you can enter a number. This will set the number of characters from the beginning of the patron's last name that will print.

For a patron with the last name of Smith and PID D123456789, the settings below would show:

Pickup By: 2/19/2020

SMI

6789

❖ 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.*

If using the 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.

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

Behavior Tab:
Click on the Behavior tab to finish the hold wrapper configuration.

Each field of the holds wrapper will be configured separately. Only the fields selected on the Default tab will appear on the Behavior tab.
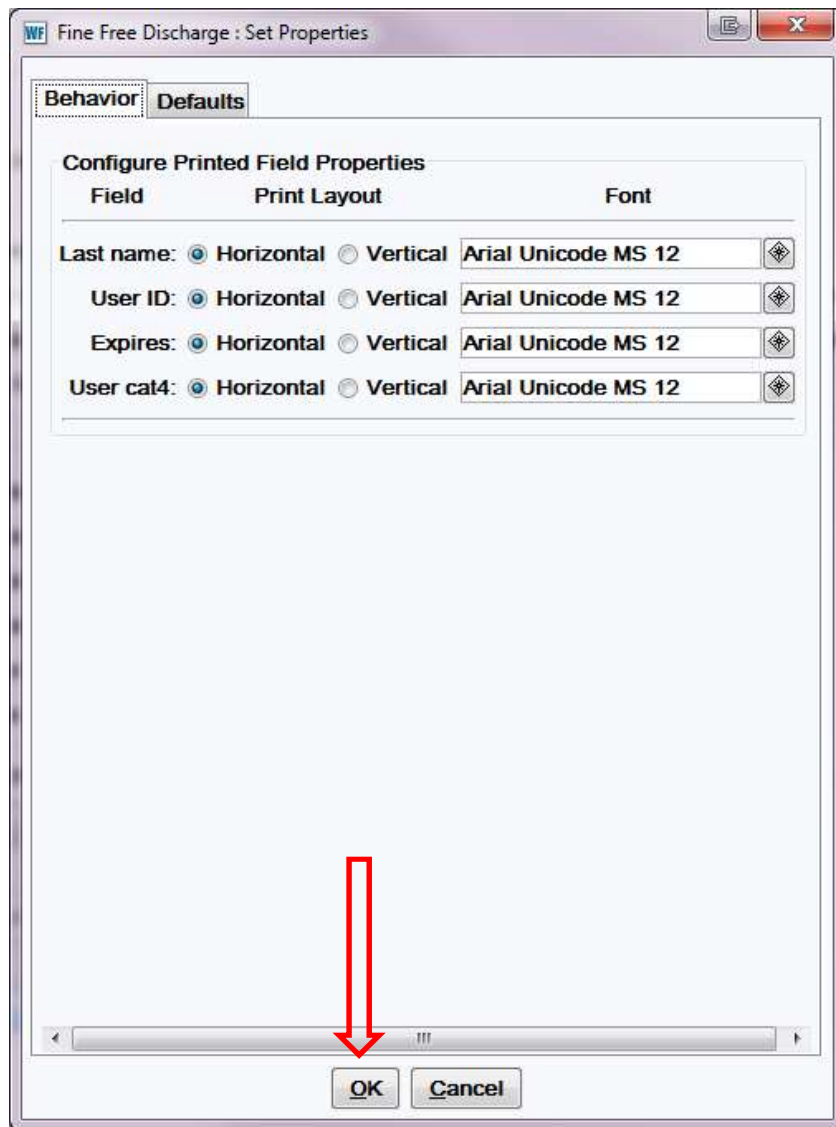
Select the print layout and font for each field listed.

After selecting the print layout and font for each field click to OK button to save the properties.

Click the Ok button at the bottom of the Set Properties popup.

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:
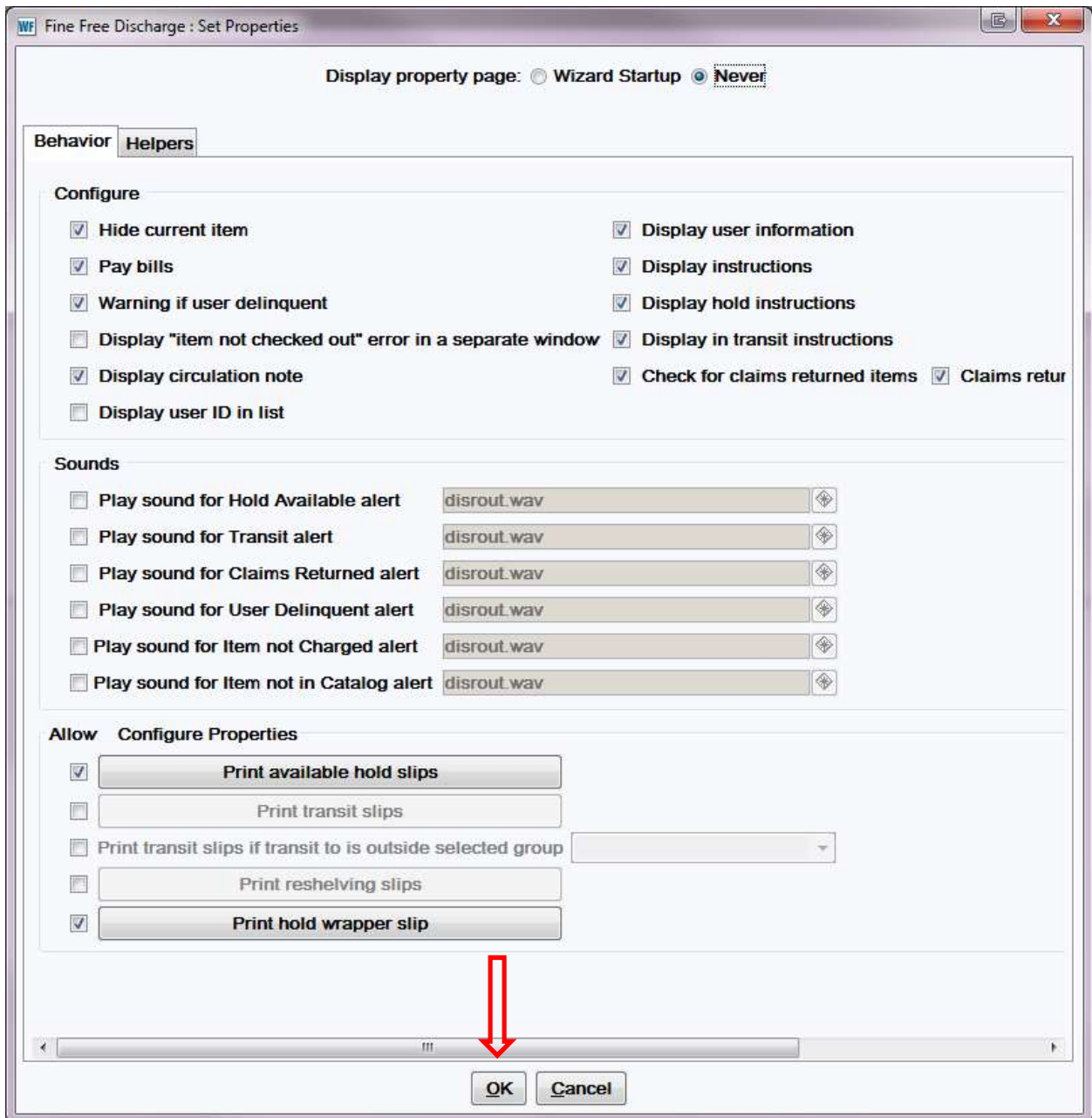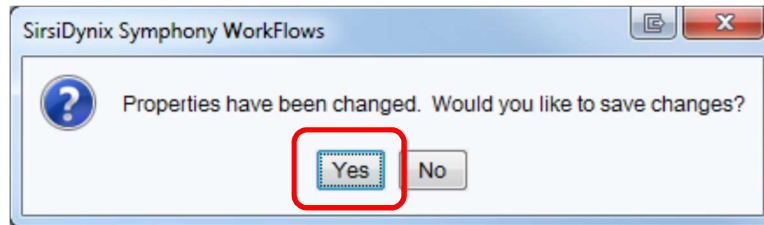

Click "Yes" to save the settings.

The Available Hold slips will be available 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??
RSA Help Desk: RSAhelp@railslibraries.info
RSA Toll Free: 866.940.4083