Receipt Configuration – Transit Slips 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.

These wizards contain the Transit 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.

Transit 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:

File Edit Wizards Module	s Preferenc	e Tools Help						
Acquisitions Cataloging	Circulation+	Offline Outreach	Reports	Requests	Reserves	Selection	Serial Control	Utility
Acquisitions Cataloging Common Tasks (a) CheckOut CheckOut CheckOut Fine Fre Renew Properties Renew Item Billing a User Paying Bills Item Search and Display Check Item Status Help Print		Offline Outreach	Reports	Requests	Reserves	5election	Serial Control	Utinty
Users 🛞 Items 🛞 Holds 🛞								

Fine Free Discharge Wizard:

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Check Item Status wizard:

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Cataloging Circulation+ Offline Outreach Reports Requests Reserves Selection Serial Control Utility Common Tasks CheckOut Discharge (Checkin) Fine Free Discharge Renew Item Billing a User Paying Billis Item Search and Dis Check Item Free Print Properties 	
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In-Transit Items 🛞	

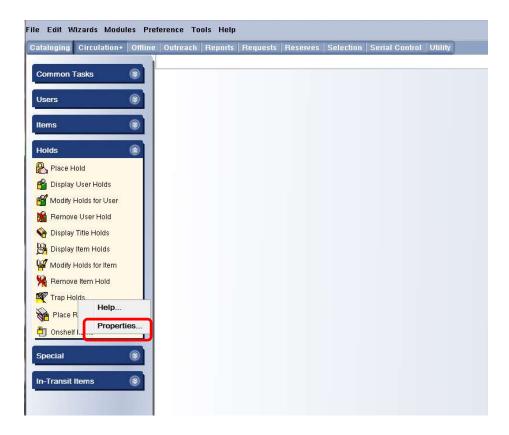
Remove User Hold wizard:

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🍄 Display User Holds								
🍟 Modify Holds for User								
Remove User Hold.								
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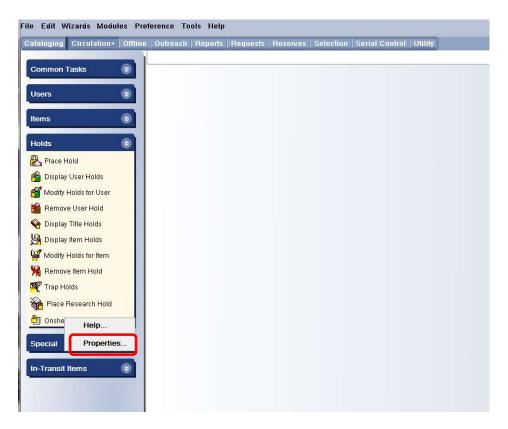
Remove Item Hold wizard:

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Trap Holds wizard:



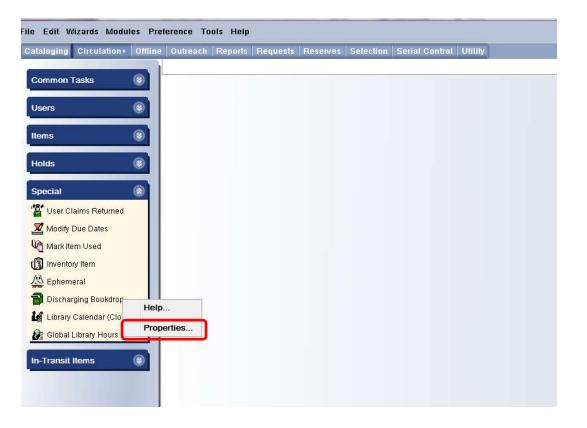
Onshelf Items wizard:



Discharging Bookdrop wizard:

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Common Tasks	.			
Users	0			
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📽 User Claims Returned				
🧤 Mark Item Used				
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Discharging Bookdrop	Help			
🚱 Global Library Hours	Properties			
In-Transit Items				

Pending Transits wizard:



Receipt (Transit)

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

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

Discharge wizard:

W Discharge (Checkin) : Set Properties		
	Display proper	ty page: 🔘 Wizard Startup 🔘 Never
Behavior Defaults Helpers		
Configure		
Hide current item	1	Display user information
Pay bills	ļ	Display instructions
Warning if user delinquent	Į	Display hold instructions
Display "item not checked out" error in	a separate window	Display in transit instructions
Display circulation note	1	Check for claims returned items 🗹 Claims returned alert: allow modify user prompt
Display bill warning for every item		
Accumulate fines: O Yes O No O Promp	t. I	☑ Display user ID in list
Sounds		
Play sound for Hold Available alert	disrout.wav	•
Play sound for Transit alert	disrout.wav	
Play sound for Claims Returned alert	disrout.wav	
Play sound for User Delinquent alert	disrout.wav	
Play sound for Item not Charged alert	disrout.wav	•
Play sound for Item not in Catalog alert	disrout.wav	
Allow Configure Properties		
Print available hold slips		
Print transit slips		
Print transit slips if transit to is outside	selected group	*
Print reshelving slips		
Print hold wrapper slip		
*		
		<u>O</u> K <u>Cancel</u>

Fine Free Discharge wizard:

Display prop	erty page: 🔘 Wizar	d St	artup 💿 Never
ehavior Helpers			
Configure			
Hide current item		V	Display user information
Pay bills		V	Display instructions
Varning if user delinquent		V	Display hold instructions
Display "item not checked out" error in	a separate window	V	Display in transit instructions
Display circulation note		1	Check for claims returned items 🛛 Claims ret
📃 Display user ID in list			
Sounds			
Play sound for Hold Available alert	disrout.wav		(*)
Play sound for Transit alert	disrout.wav		(*)
Play sound for Claims Returned alert	disrout.wav		
Play sound for User Delinquent alert	disrout.wav		
Play sound for Item not Charged alert	disrout.wav		
Play sound for Item not in Catalog alert	disrout.wav		(*)
Allow Configure Properties			
Print available hold slips			
Print transit slips			
Print transit slips if transit to is outside s	selected group		·
Print reshelving slips			
Print hold wrapper slip			

Check Item Status wizard:

ehavio	r Helpers
VD	isplay instructions
23	isplay hold instructions
D	isplay in transit instructions
Allow	Configure Properties
	Print available hold slips
	Print transit slips
	Print reshelving slips
m	Print hold wrapper slip

Remove User Hold wizard:

Benavio	Defaults Helpers	
R	emove From Holds Shelf	
M	ake next hold available	
Di	isplay summary screen	
Allow	Configure Properties	
Allow	Configure Properties Print available hold slips	
	Print available hold slips	

Remove Item Hold wizard:

ehavior	Defaults Helpers
Re	emove From Holds Shelf
Ma	ake next hold available
🛛 Di	splay summary screen
Allow	Configure Properties
	Print available hold slips
	Print transit slips
	Print reshelving slips
	NES 100 100 00

Trap Holds wizard:

	Display property page: 🔘 Wizard Startup 💿 Never	
<u>Behavior</u>	Helpers	
Allow	Configure Properties	-
	Print available hold slips	
	Print transit slips	
Pr	int transit slips if transit to is outside selected group	=
	Print reshelving slips	
	Print hold wrapper slip	
< [m	, -

Onshelf Items wizard:

	Helpers	
	w Trap Hold	Allow Mark Item missing
	w Print List	Allow Unfill Hold
🔽 Disp	blay author	Display discharge date
🔽 Disp	olay hold pickup	Display item ID
🔽 Disp	olay item type	Display location
🔽 Disp	olay title	Display user ID
🔽 Disp	olay user name	Display user notify via
Pron	mpt for confirmation before marking an item miss	ing and unfilling a hold
Allow C	Configure Properties	
P	rint available hold slips	
	Print transit slips	
	Print reshelving slips	

Discharging Bookdrop wizard:

	Display property page: 🔘 Wiza	dS	tartup Never
ehavior	Helpers		
🔽 Di	splay instructions	V	Warning if user billed
🔽 Di	splay hold instructions	V	Display in transit instructions
	low discharge dates in the future	V	Display user information
📃 Di	splay "item not checked out" error in a separate window		Display circulation note
V Cł	neck for claims returned items	V	Claims returned alert: allow modify user prompt
Allow	Configure Properties		
Allow	Configure Properties Print available hold slips		
-			
	Print available hold slips		•
	Print available hold slips Print transit slips		
	Print available hold slips Print transit slips rint transit slips if transit to is outside selected group		
	Print available hold slips Print transit slips rint transit slips if transit to is outside selected group Print reshelving slips		
	Print available hold slips Print transit slips rint transit slips if transit to is outside selected group Print reshelving slips		

Denavior	Helpers
🔽 Di	splay instructions
📃 Di	splay hold instructions
🔄 Di	splay in transit instructions
Allow	Configure Properties
	Print available hold slips
	Print transit slips
	Print reshelving slips

The Set Properties box will pop up.

- > Print transits slips: Prints a transit slip to include with item sent through delivery.
 - Receipt Header (Optional): You may choose to leave the receipt header blank so the library the item is being transited to will appear first on the transit receipt after completing the receipt fields. If you are not entering information into the receipt header skip the receipt header setup.

If using the Receipt Header: Click the gadget 1 to the right of the Receipt Header box to enter information that will appear on the top of the receipt.

Fine Free Discharge : Set Properties	
Defaults	
Receipt header:	
Receipt fields:	
	*
Receipt footer:	
Allow date formatting description	
Date format description:	
<u>Q</u> K <u>C</u> ancel	

Gadget : :	er String:			
List sele	cted		ă.	
			ſ	Up
				Down
	<u>а</u> п			
Add	(<u>o</u>) <u>S</u> av	e <u>R</u> emo	ove <u>C</u> a	ncel

• 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.

Receipt fields:

Click the gadget 1 to the right of the Receipt fields display box to select the information that will be included on your receipt.

efaults	
Receipt header:	*
Receipt fields:	
Receipt footer:	*
Allow date formatting description	
Date format description:	

The suggested minimum information to include on the receipt is:

Transit to Title Item ID Transit library

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.

List to choose from	List selected	
Author Call number Current time Item ID Title Transit date Transit library Transit Rsn Transit to Transit to library group User ID User name	Transit to Title Item ID Transit library	
	<u>O</u> K <u>C</u> ancel	

Fine Free Discharg	: Set Properties	
Defaults		
Receipt header	-	*
Receipt fields:	Transit to Title Item ID Transit library	
Receipt footer:		*
Allow date for Date format des	matting description	
	<u>O</u> K <u>C</u> ance	4

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): You may choose to leave the receipt header blank. If you are not entering information into the Receipt footer skip the receipt footer setup.

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

	<u> </u>		
Receipt header	2		
	T		
	Transit to Title		
Receipt fields:	Item ID		
	Transit library	🛞	
Receipt footer:			
		(* 	- 1
Allow date for	ormatting description		
Date format des	scription:		

Enter String:	
List selected	
	Up
	Down

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.

Defaults		
Receipt header:	Resource sharing Alliance	
Receipt fields:	Title Name User ID Phone number	
Receipt footer:		۲
Allow date for Date format des	rmatting description	
	Ţ	

(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 Transit Slips click the OK button on the bottom the CheckOut: Set Properties pop up box.

(Optional) Print transit slips if transit to is outside selected group

This transit slip option is found on the Behavior tab on the following wizard property screens:

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

When this option is selected the Print Transit slip check box will be automatically selected. If this option is selected transit receipts will not print for libraries in your library group (branches):

Discharge (Checkin) : Set Properties					
	Display prope	erty pag	e: 🔘 Wizard Startup 💿 Never		
Behavior Defaults Helpers					
Configure					
Hide current item		Disp	lay user information		
Pay bills		Disp	lay instructions		
Warning if user delinquent		Disp	lay hold instructions		
Display "item not checked out" error in a separate window			Display in transit instructions		
Display circulation note		Cheo	ck for claims returned items 📝 Claims returned alert: allow modify user p	romp	
Display bill warning for every item					
Accumulate fines: O Yes O No O Promp	t	Disp	lay user ID in list		
Sounds			·		
Play sound for Hold Available alert	disrout wav				
Play sound for Transit alert	disrout.wav				
Play sound for Claims Returned alert	disrout.wav				
Play sound for User Delinquent alert	disrout.wav				
Play sound for Item not Charged alert Play sound for Item not in Catalog alert	disrout.wav				
Play sound for Item not in Catalog alert	disrout.wav				
Allow Configure Properties					
Print available hold slips	s				
V Print increase as page					
Print transit slips if transit to is outside	selected group				
Print resneiving silps					
Print hold wrapper slip					
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• Place a check mark in the box in front of "Print transit slips if transit to is outside selected group".

		Display p	roperty	age: 🔘 Wizard Startup 🍥 Neve	er.
ehavior	Defaults Helpers				
Config	ure				
ПН	lide current item		V	Display user information	
V P	ay bills		V	Display instructions	
Warning if user delinquent			V	Display hold instructions	
🗹 D	isplay "item not checked out" error in	a separate win	dow 🔽	Display in transit instructions	
V D	isplay circulation note		J	Check for claims returned items	Claims returned alert: allow modify user prom
D	isplay bill warning for every item				
Accu	mulate fines: 🔘 Yes 💿 No 🔘 Promp	ot	V	Display user ID in list	
Sound	S				
P	lay sound for Hold Available alert	disrout.wav		*	
P	lay sound for Transit alert	disrout.wav		•	
P	lay sound for Claims Returned alert	disrout.wav		(*)	
P	lay sound for User Delinquent alert	disrout.wav			
Pl	ay sound for Item not Charged alert	disrout.wav		*	
📄 Pl	ay sound for Item not in Catalog alert	disrout.wav		*	
llow	Configure Properties				
☑ [Print available hold slips	3			
	Print transit slips)			
V P	rint transit slips if transit to is outside	selected group	_		
	Print reshelving slips		01_0N		
Print hold wrapper slip		03_0	Y		
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			PO_AL	PPL	
			PO_ON	Y	

• Select the library group to exclude from the drop down menu at the end of the option.

ischarge (Checkin) : Set Properties		
	Display propert	y page: 🔘 Wizard Startup 💿 Never
havior Defaults Helpers		
Configure		
Hide current item	B	Display user information
Pay bills	E	Display instructions
Warning if user delinquent	1	Display hold instructions
Display "item not checked out" error in a separate win		Display in transit instructions
Display circulation note	E	🛛 Check for claims returned items 🛛 Claims returned alert: allow modify user prom
Display bill warning for every item		
Accumulate fines: Ves No Promp	t 🗄	☑ Display user ID in list
Sounds		
Play sound for Hold Available alert	disrout.wav	
Play sound for Transit alert	disrout.wav	
Play sound for Claims Returned alert	disrout.wav	
Play sound for User Delinquent alert	disrout.wav	
Play sound for Item not Charged alert	disrout.wav	(*)
Play sound for Item not in Catalog alert	disrout.wav	
llow Configure Properties		
Print available hold slips		
Print transit slips		
Print transit slips if transit to is outside	selected group P0_A	LL-PPL
Print reshelving slips		
Print hold wrapper slip		
		III.

- No transit slip will print if the item is being placed in transit to any branch of the library selected.
- If the Print Transit Slip has not been configured:
 - Click on the Print Transit Slip bar
 - Go to the beginning of this document and follow the directions for configuring the Transit slip
 - \circ ~ Click the OK button at the bottom of the Set Properties box.

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

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



Click "Yes" to save the settings.

The Transit 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: <u>http://alsrsa.org/client/search/asset/3503</u>

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: <u>http://alsrsa.org/client/search/asset/4346</u>

Questions?? Contact Martha at: RSA Help Desk:<u>RSAhelp@railslibraries.info</u> RSA Toll Free: 866.940.4083 RSA Local: 309.740.3805 martha.troxell@railslibraries.info