

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:

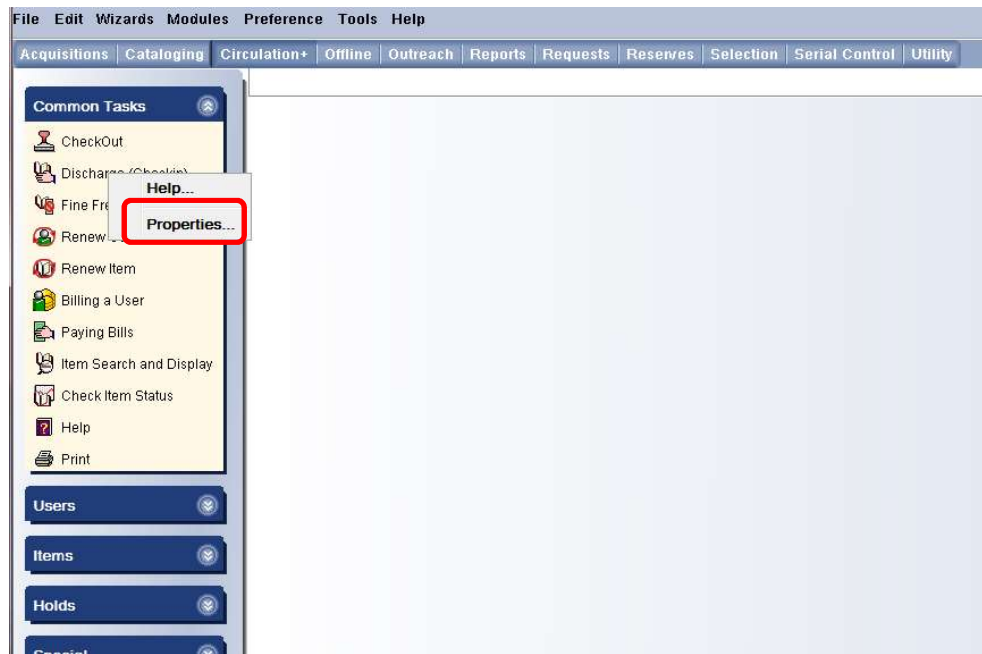
- Enter your WorkFlows library name followed by SUPER. The pin is also SUPER.
Example:



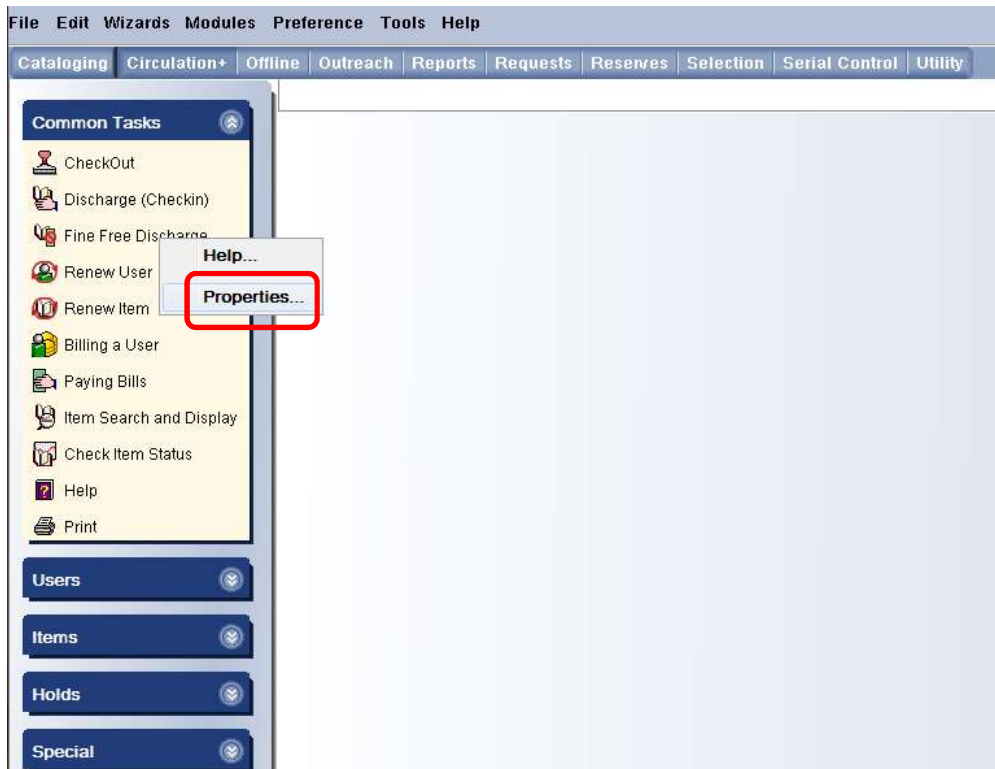
In the Circulation module:

- 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.

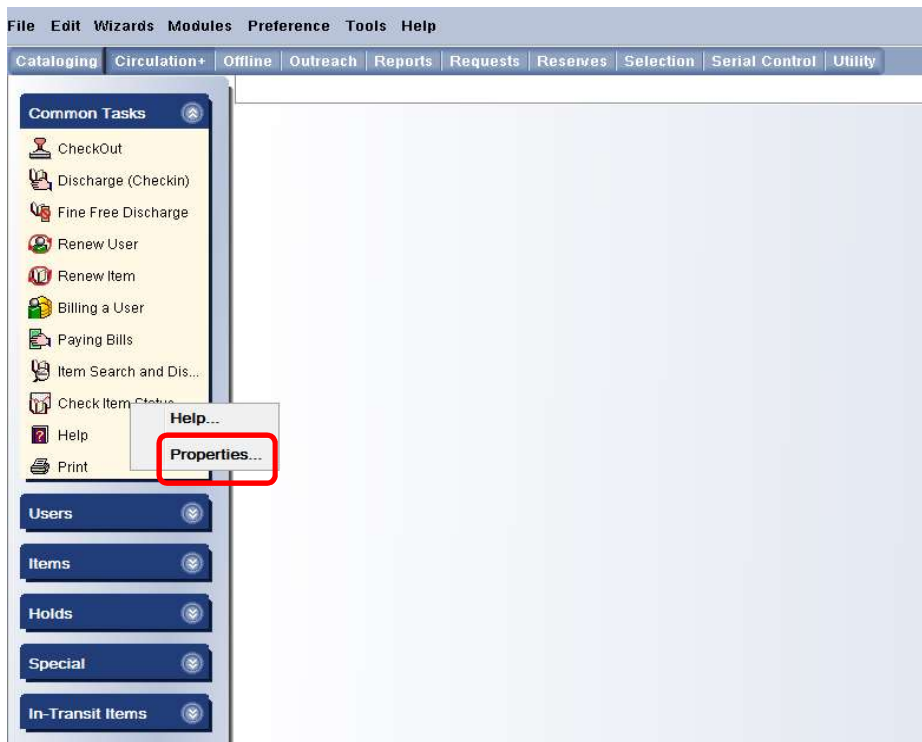
Discharge Wizard:



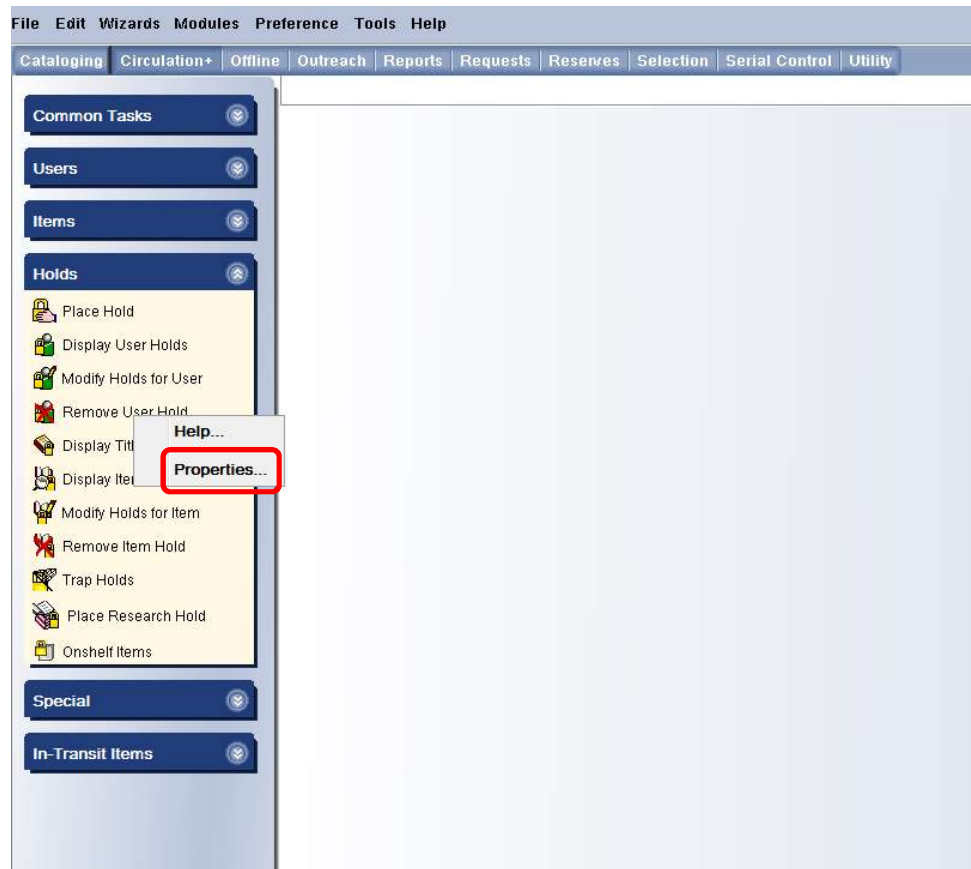
Fine Free Discharge Wizard:



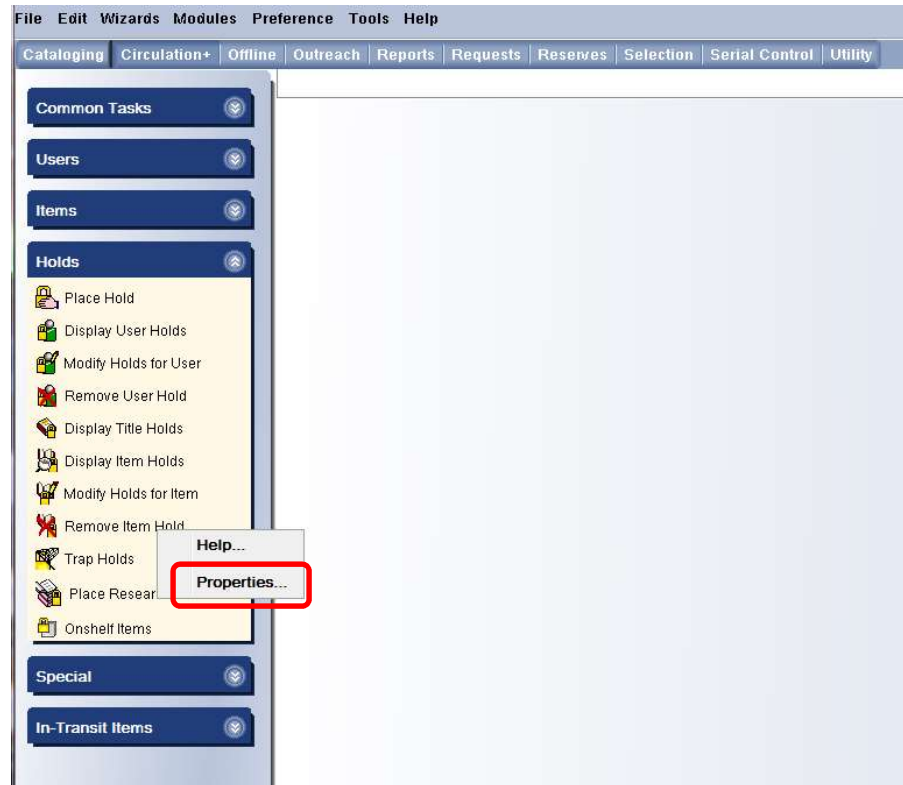
Check Item Status wizard:



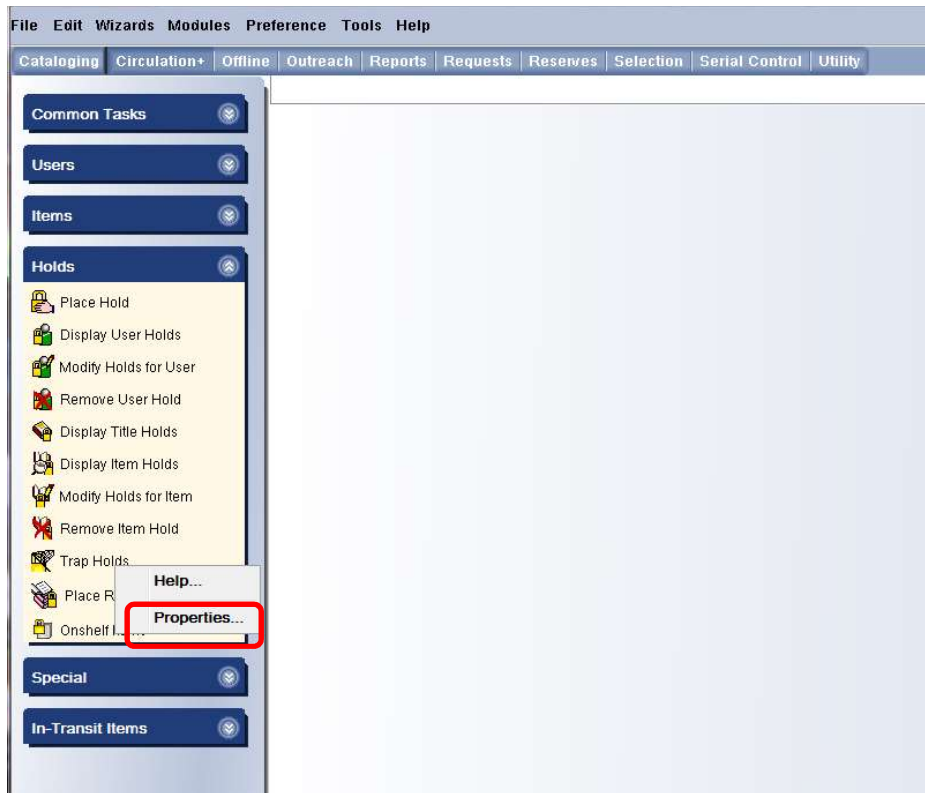
Remove User Hold wizard:



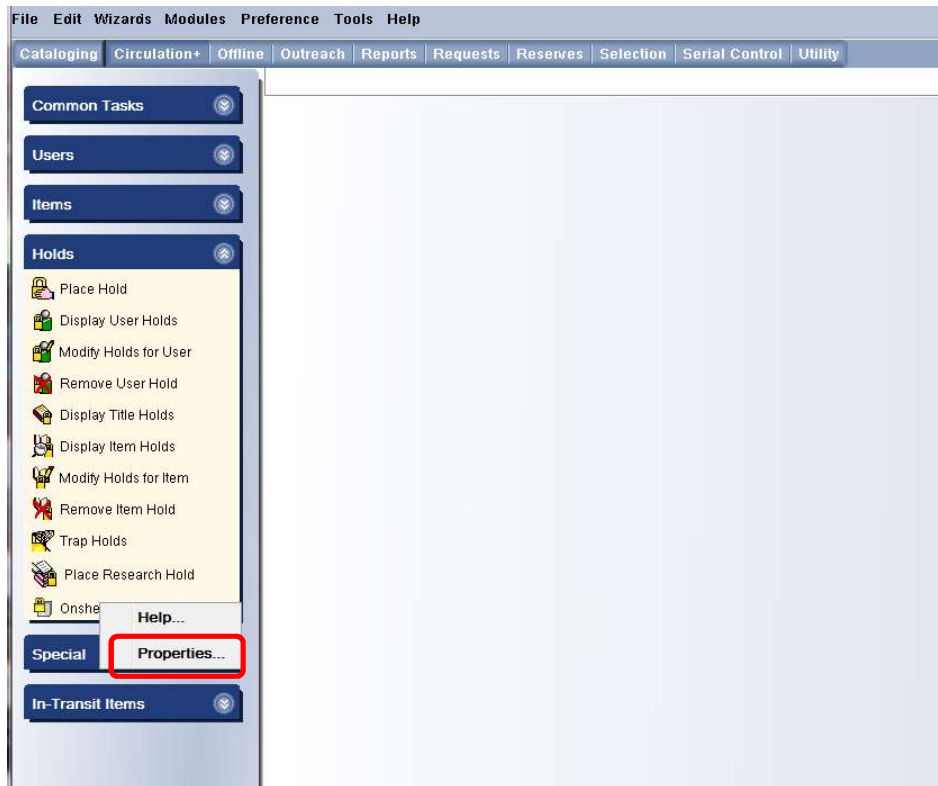
Remove Item Hold wizard:



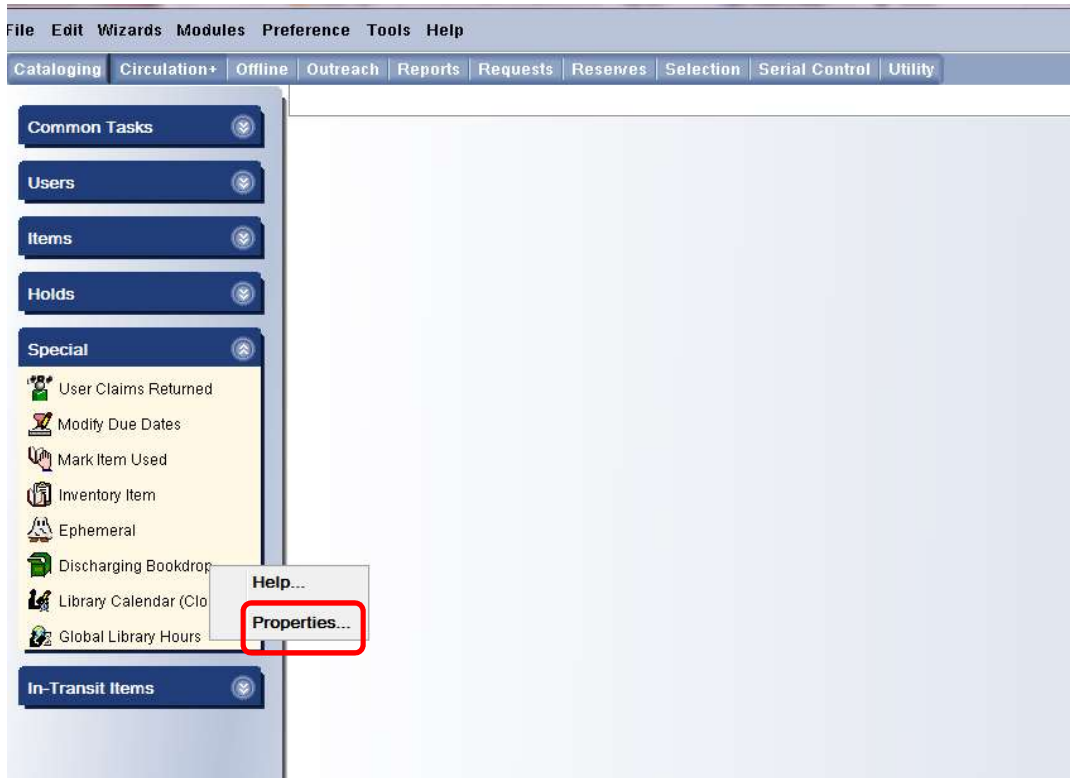
Trap Holds wizard:



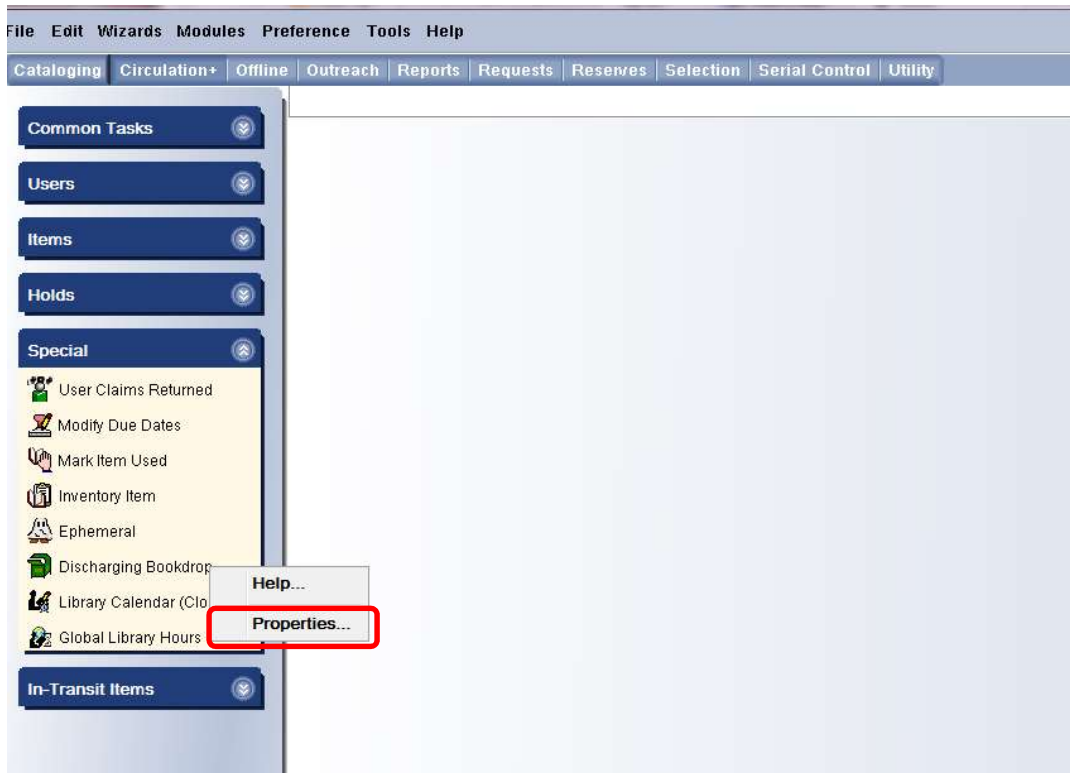
Onshelf Items wizard:



Discharging Bookdrop wizard:



Pending Transits wizard:

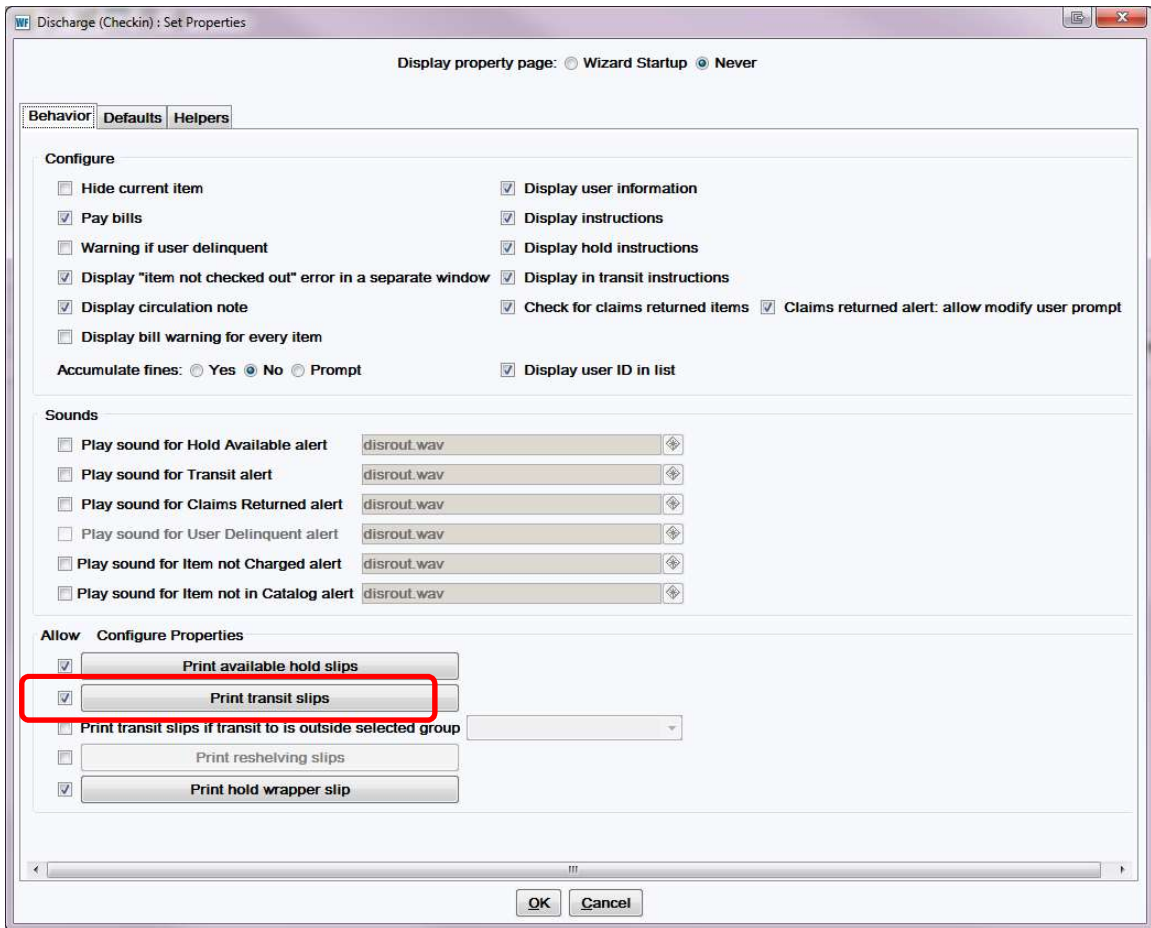


Receipt (Transit)

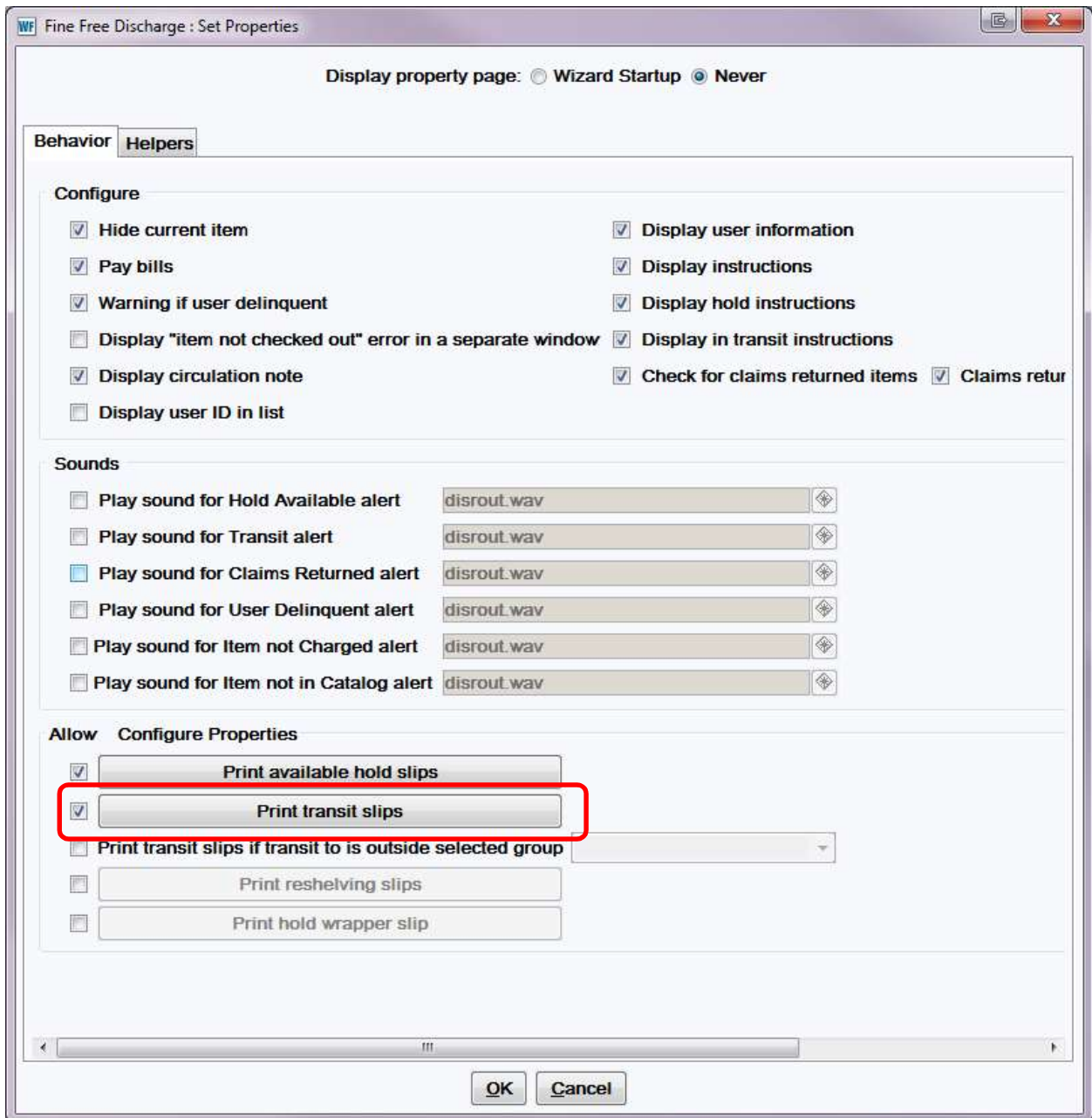
The Set Properties popup box contains a check box labeled Print transit slips on the Behavior tab.

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

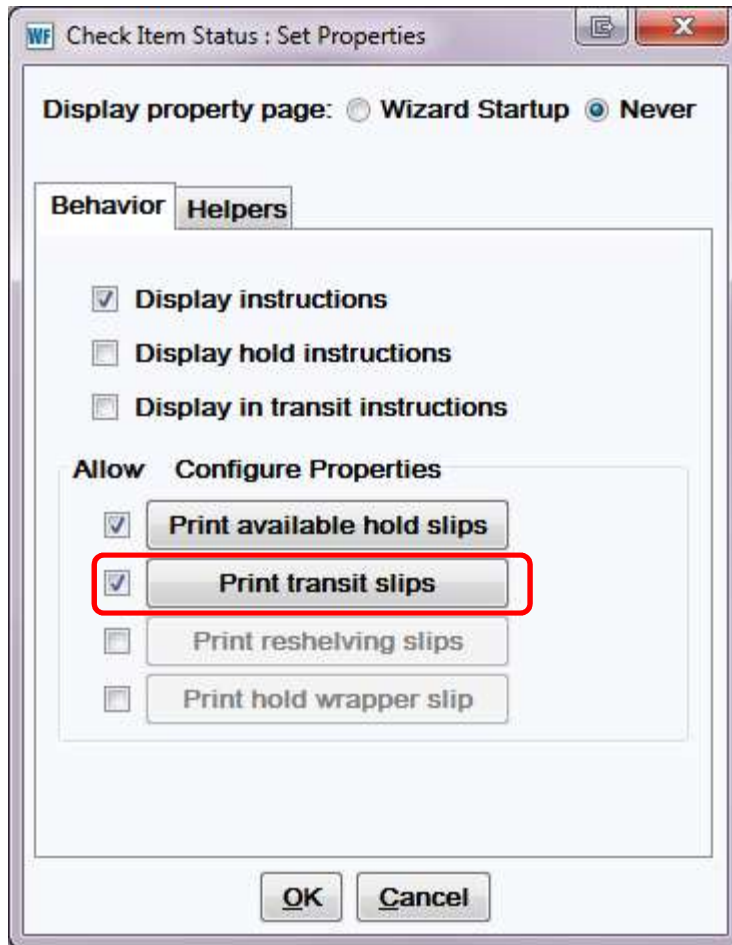
Discharge wizard:



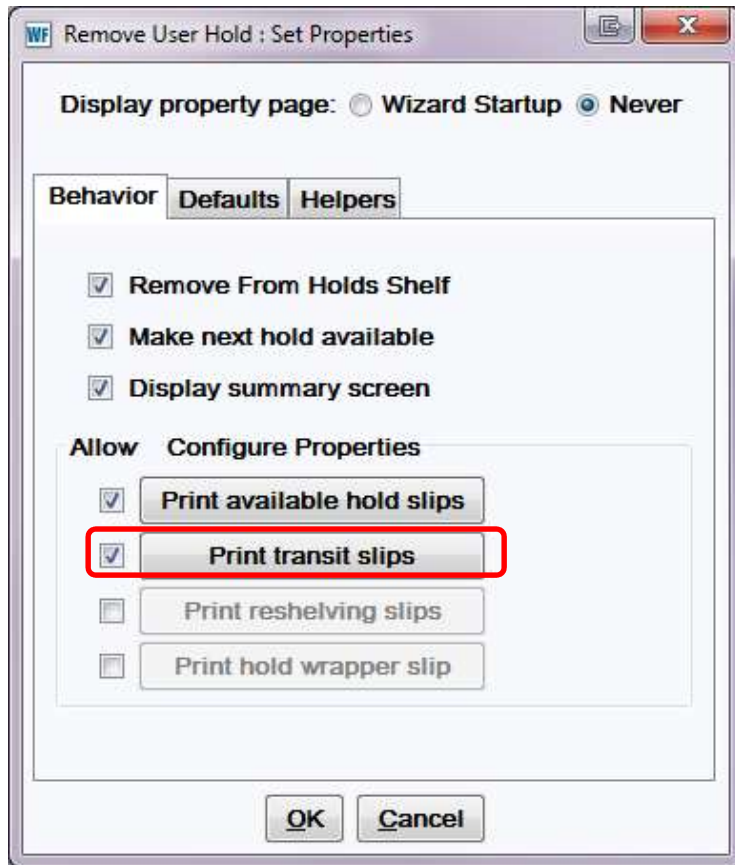
Fine Free Discharge wizard:



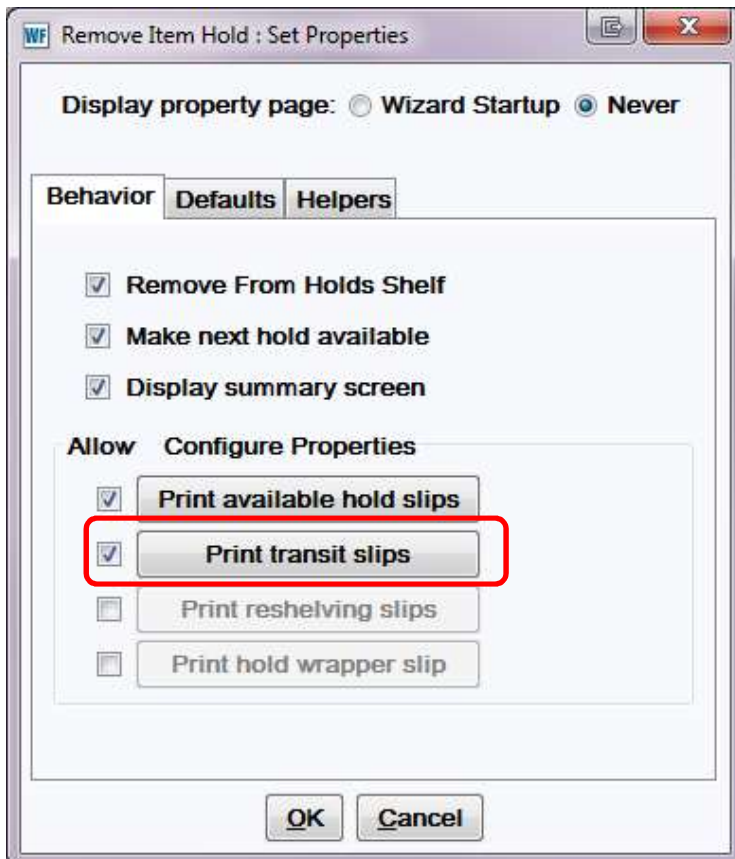
Check Item Status wizard:



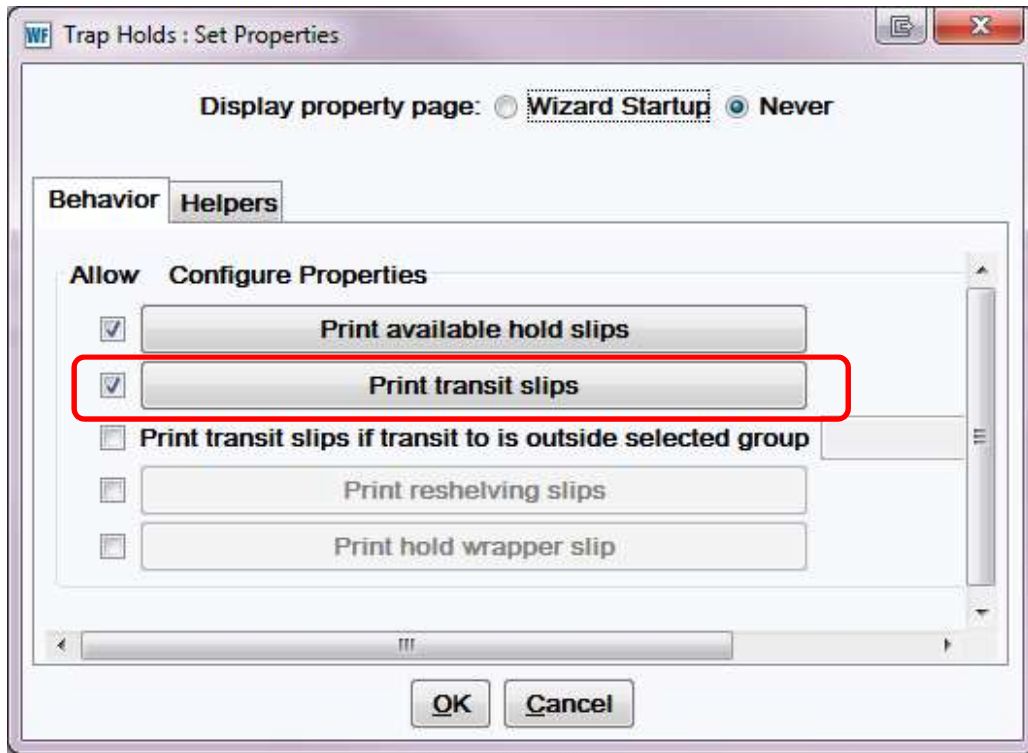
Remove User Hold wizard:



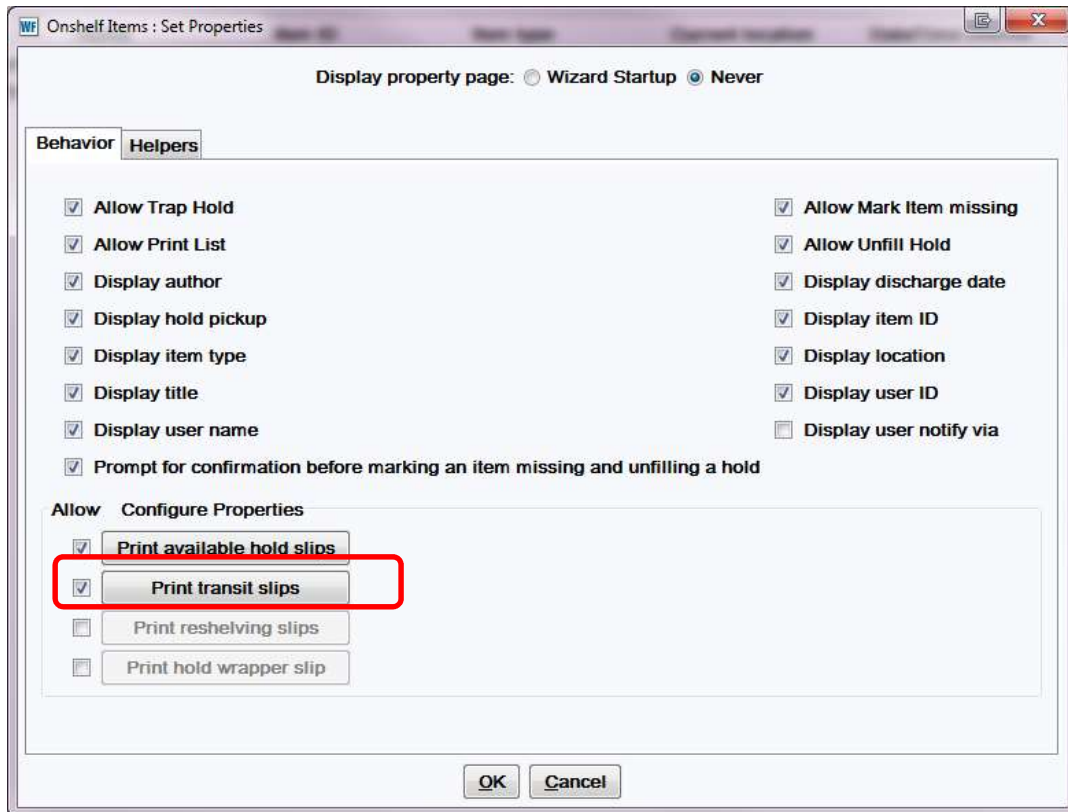
Remove Item Hold wizard:



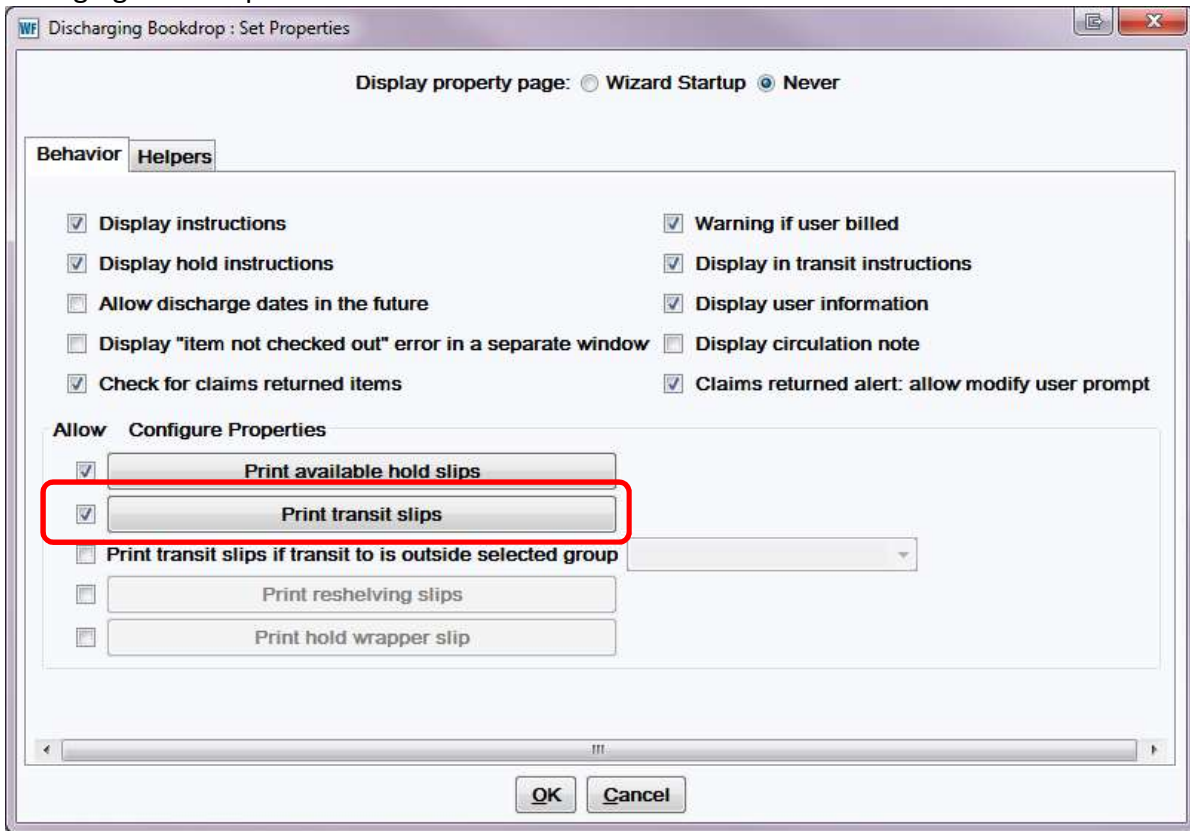
Trap Holds wizard:



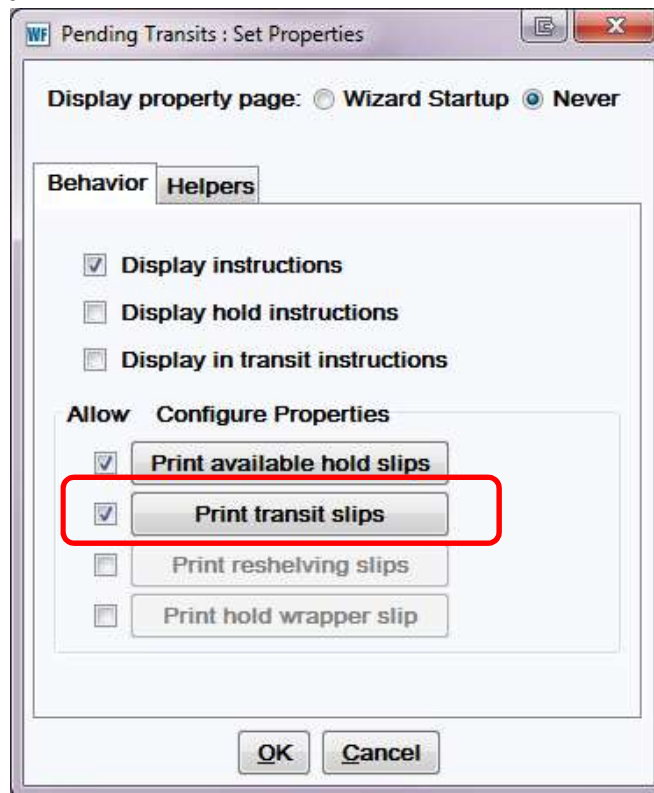
Onshelf Items wizard:



Discharging Bookdrop wizard:



Pending Transits wizard:

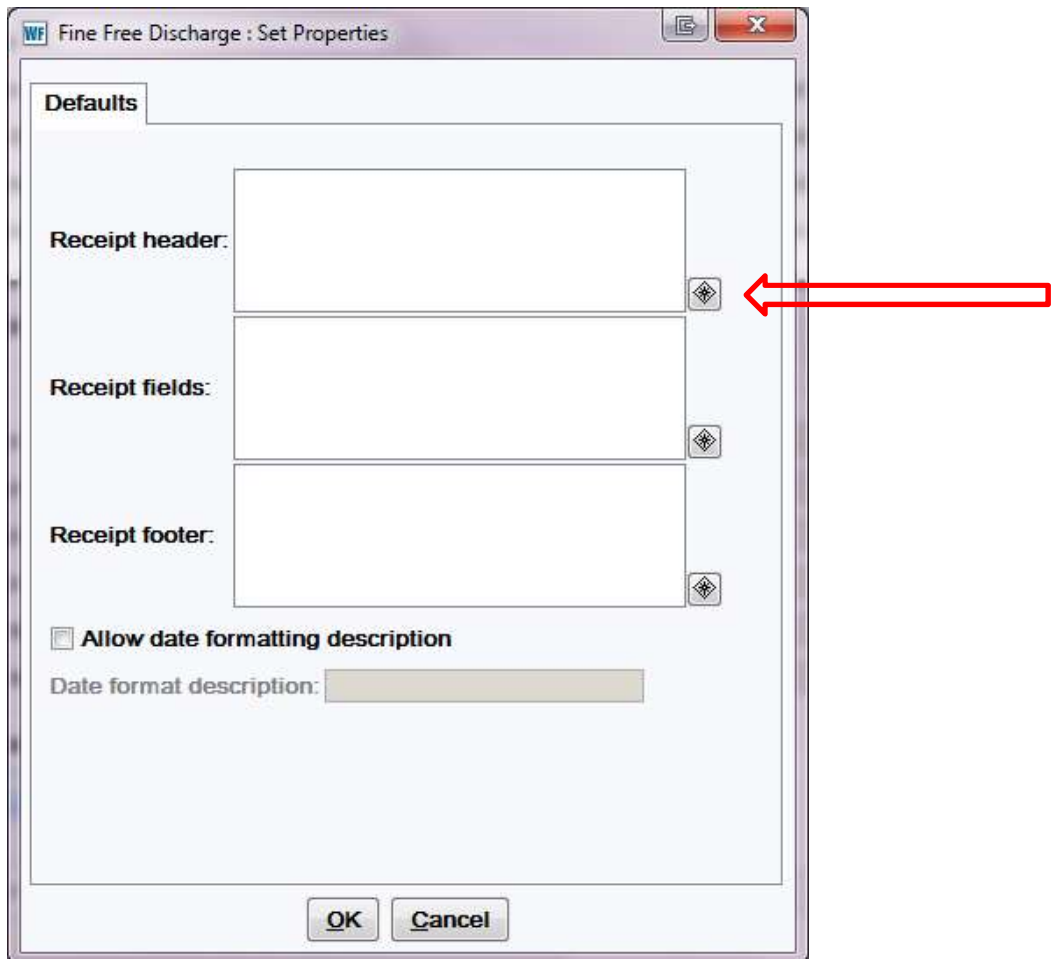


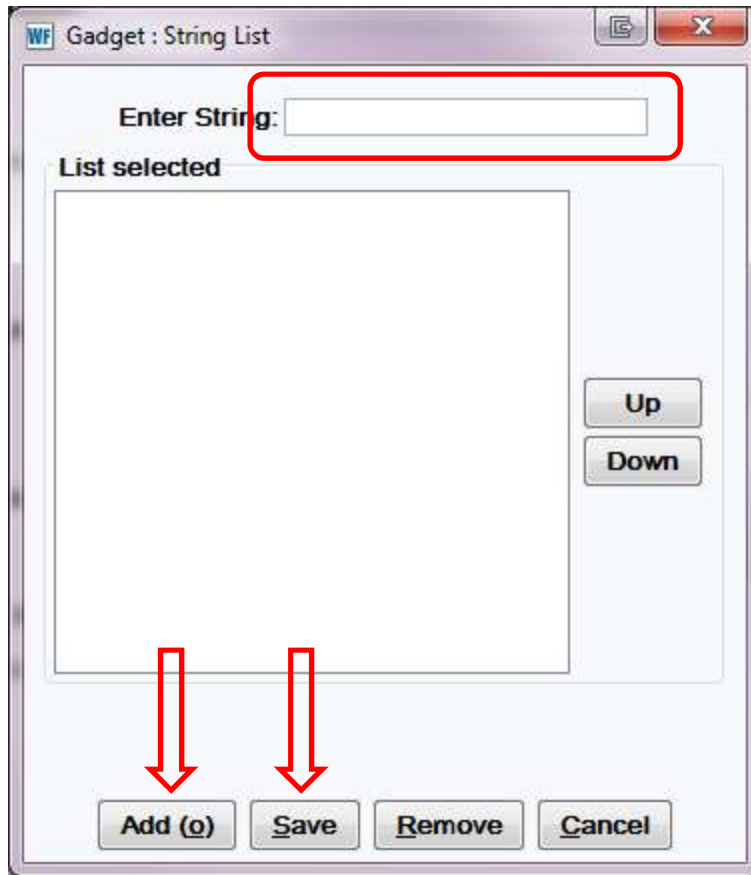
The Set Properties box will pop up.

➤ Print 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  to the right of the Receipt Header box to enter information that will appear on the top of the receipt.




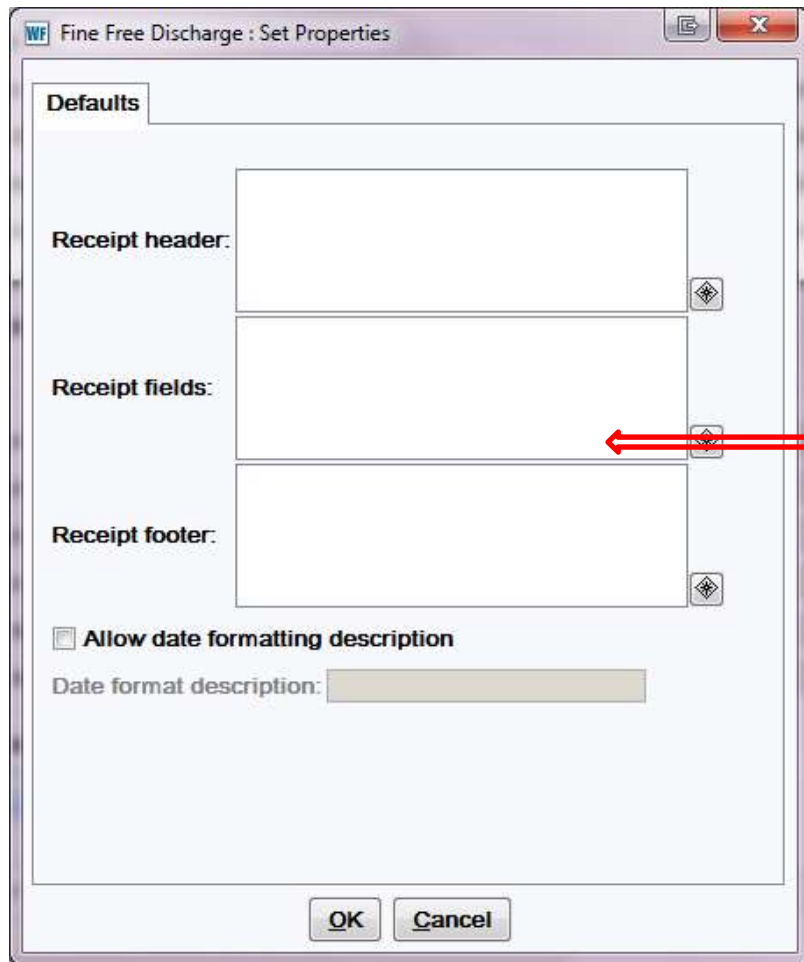


- Enter the information into the Enter String box and click the Add button on the bottom of the Gadget: string List box

The information added to the Receipt 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:

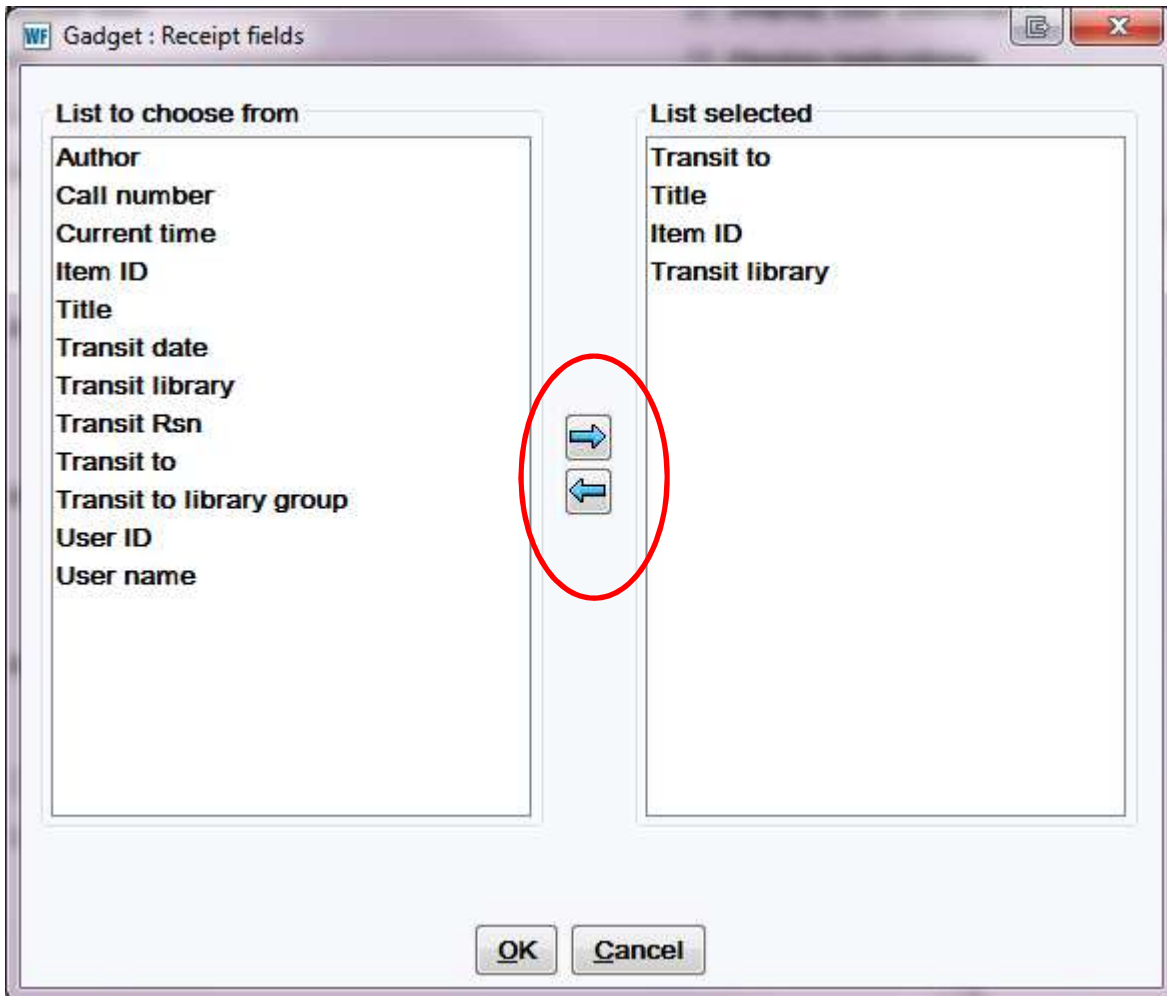
Click the gadget  to the right of the Receipt fields display box to select the information that will be included on your receipt.

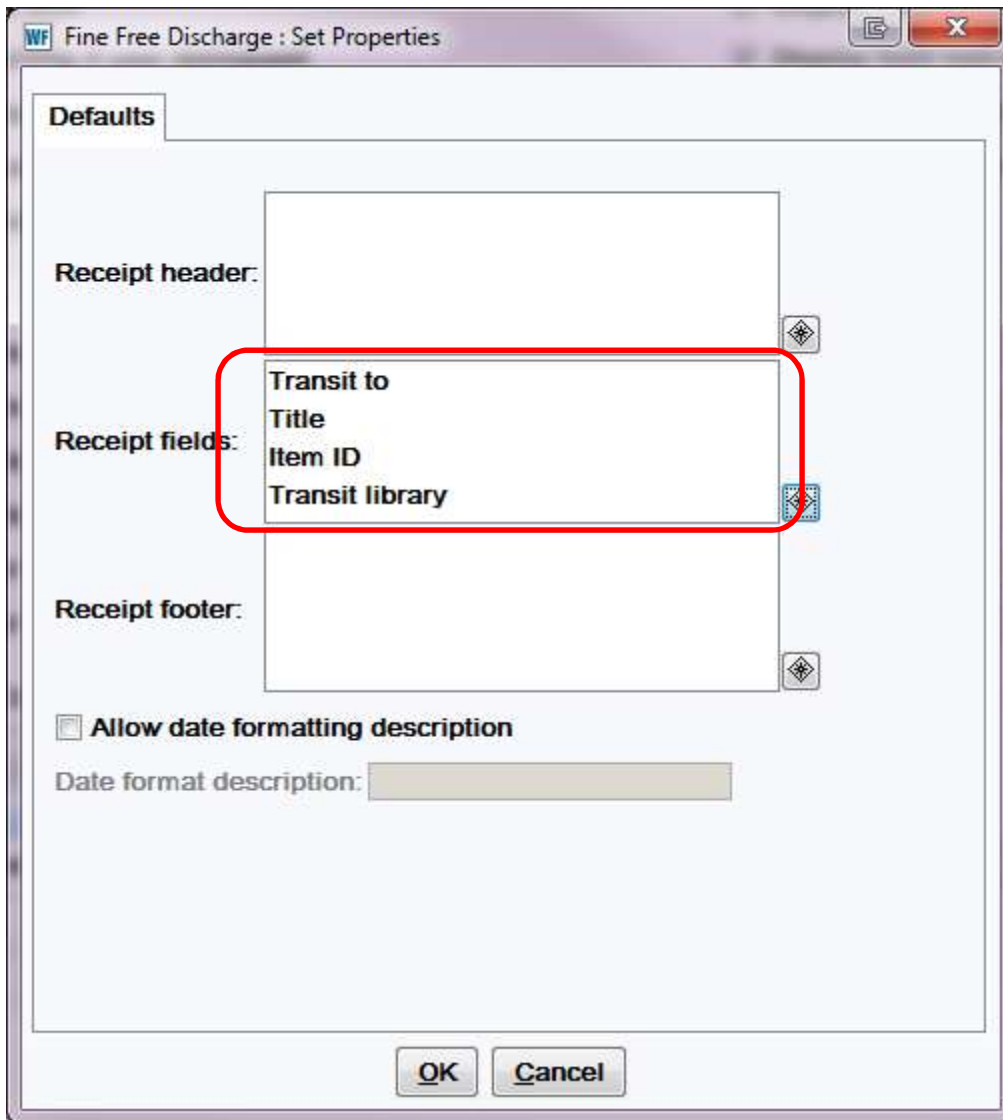


The suggested minimum information to include on the receipt is:

- 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.



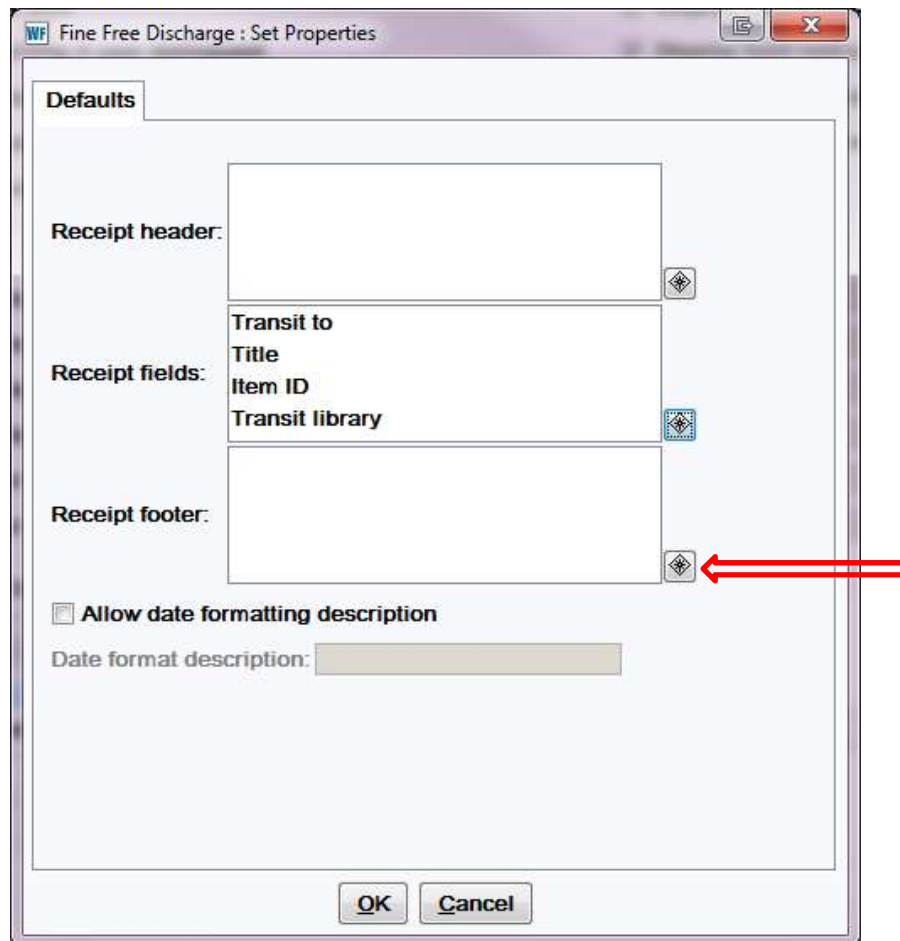


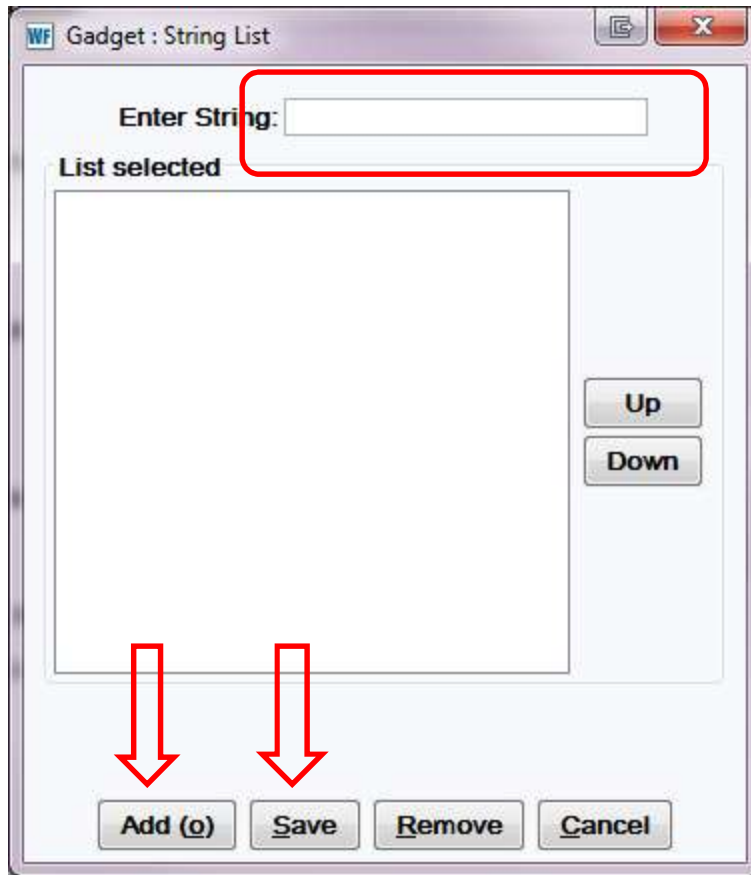
The information added to the receipt fields will appear in the Receipt fields display box on the Set Properties popup box.

❖ 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.*

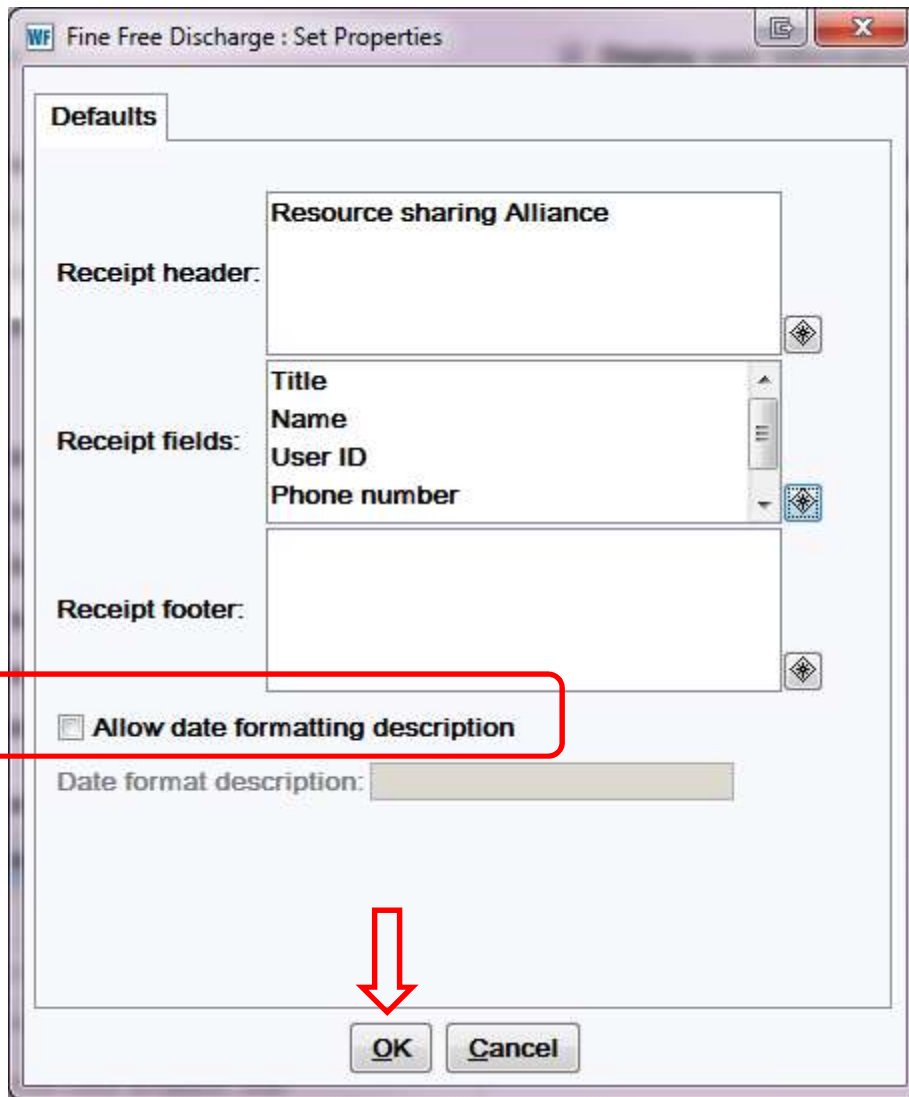
If using the Receipt Footer: Click the gadget  to the right of the Receipt Footer box to enter information that will appear on the bottom of the receipt.





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

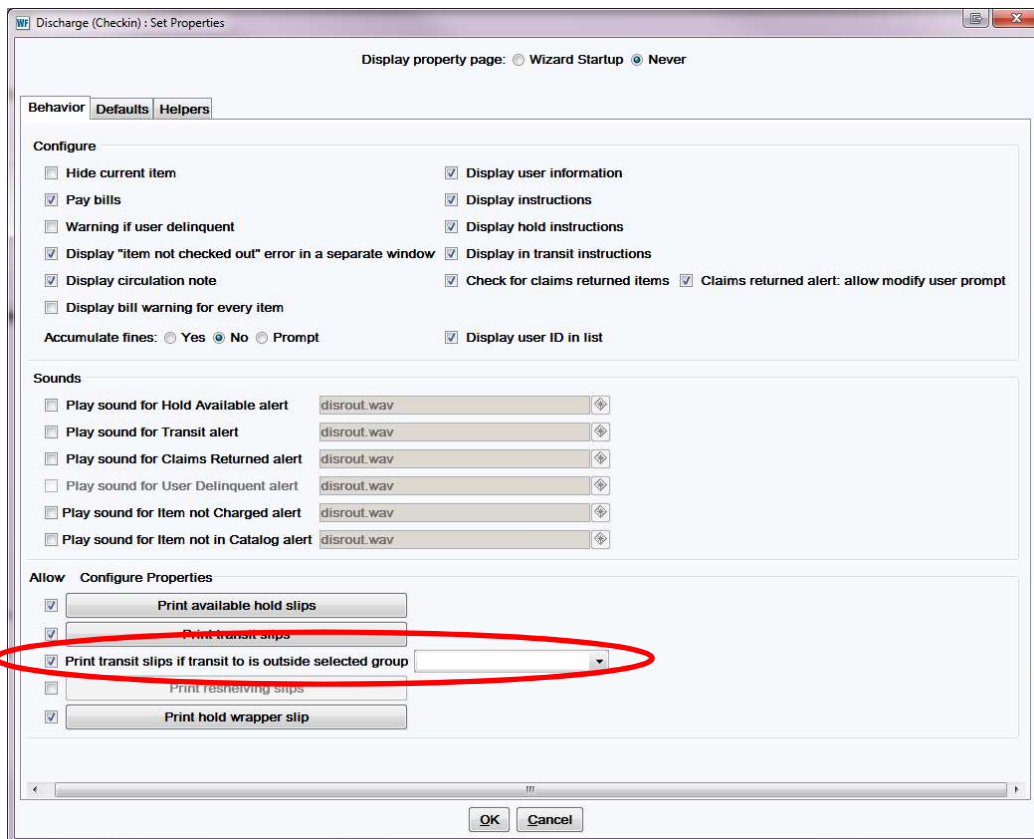
When you have finished configuring the Transit Slips click the OK button on the bottom the CheckOut: Set Properties pop up box.

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

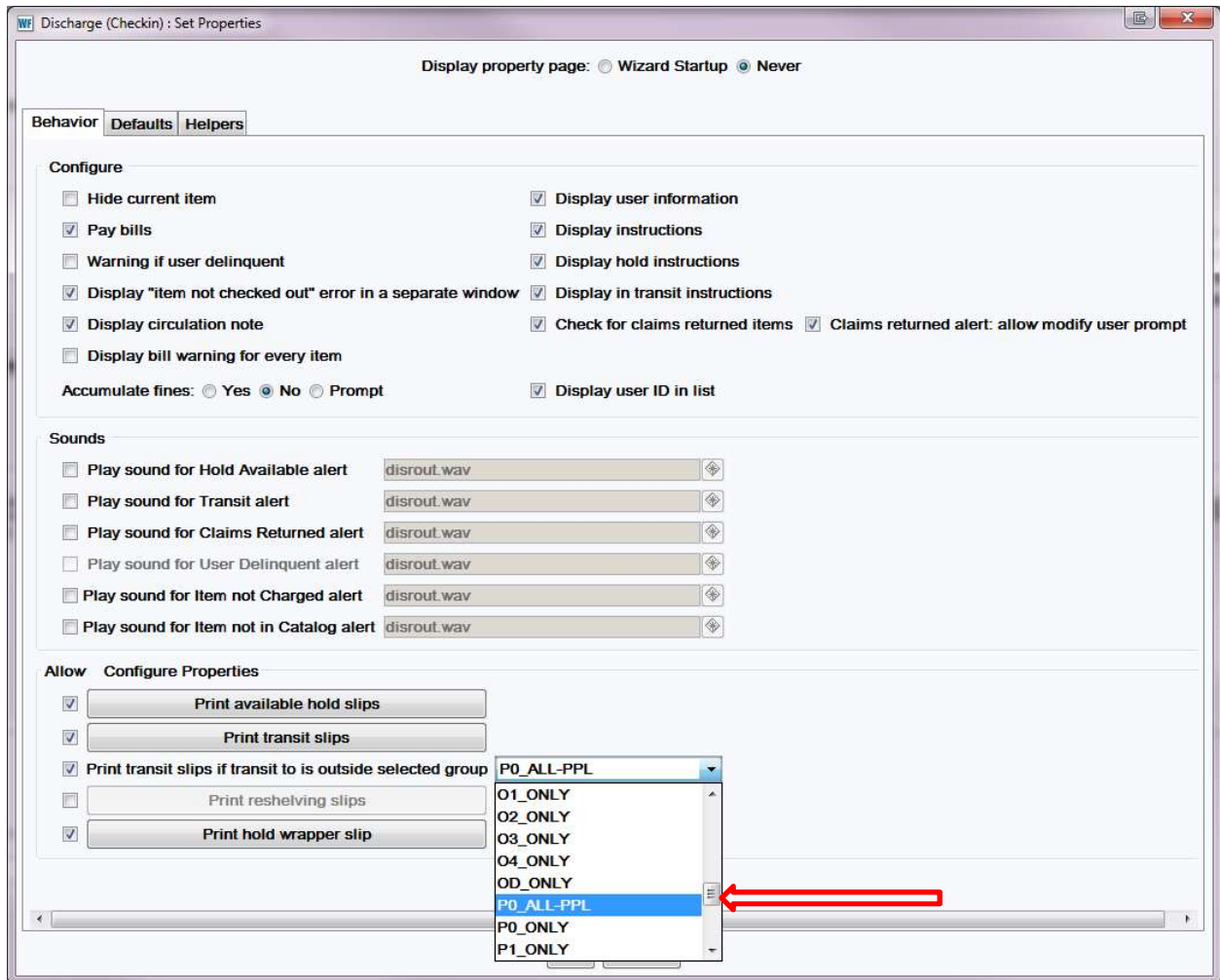
This transit slip option is found on the Behavior tab on the following wizard property screens:

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

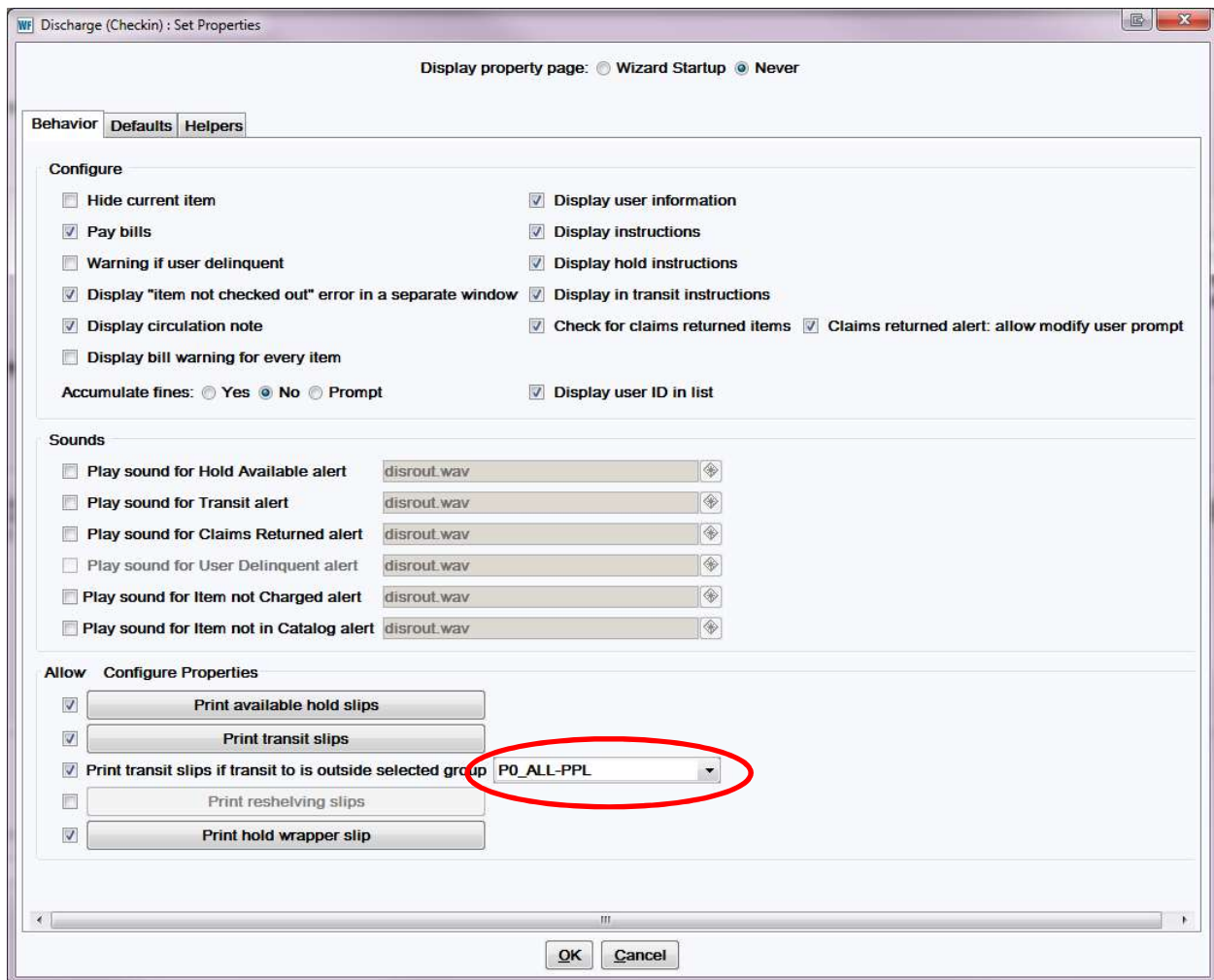
When this option is selected the Print Transit slip check box will be automatically selected. If this option is selected transit receipts will not print for libraries in your library group (branches):



- Place a check mark in the box in front of “Print transit slips if transit to is outside selected group”.



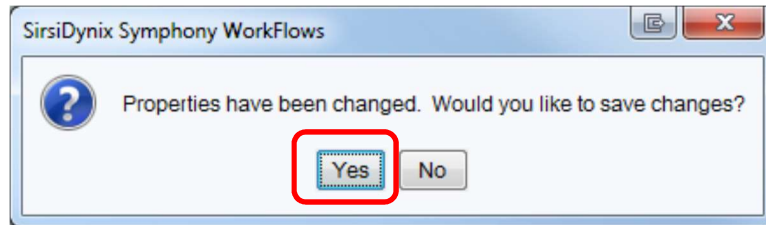
- Select the library group to exclude from the drop down menu at the end of the option.



- 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
 - 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:

<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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