



## GoPrint Cashier Role

### Library/Web Café

Patrons walk up to the reference desk and purchase print funds. Staff members who have been granted the Cashier Role collect the funds and log in to Control Center and create a Quota ID and apply the funds to the account.

Optionally, users can send their print jobs to a hold queue and the print jobs remain on hold at a Print Release Station at the reference desk. When ready, users walk up to the desk and pay for their specific jobs and the staff member releases them. No Quota account is created.

If a Print Release Station isn't an option, staff members can log in to Control Center (as a user assigned the Cashier Role) and release print jobs.

At the end of the day a Cashier Closing Report is run displaying the total amount of money collected or number of prints released which then can be compared to cash collected in the drawer.

Cashiers may deposit tender into an account but they are not permitted to make withdrawals. An entity with Cashier Role also has access to the Cashier Report which defaults to the current day's transactions.

The Cashier Role is intended for someone at the customer's site who receives tender and applies it to other user's accounts. They will typically stay on the Manager User screen at all times, need to have quick account creation, and be able to easily run the Cashier Report to account for any tender amounts that are in their care.

**Rights:** add and delete quota users, add additional user classes to an account, and manually add funds to an account.

**Restrictions:** cannot change users pin once it's been set, cannot apply a negative amount to a user's quota.

By default the Cashier Role does NOT have the Rights to deduct funds.

The Cashier Role cannot be combined with Print Job Control and Agents UNLESS the SYSTEM ADMIN "READ" permission is applied.

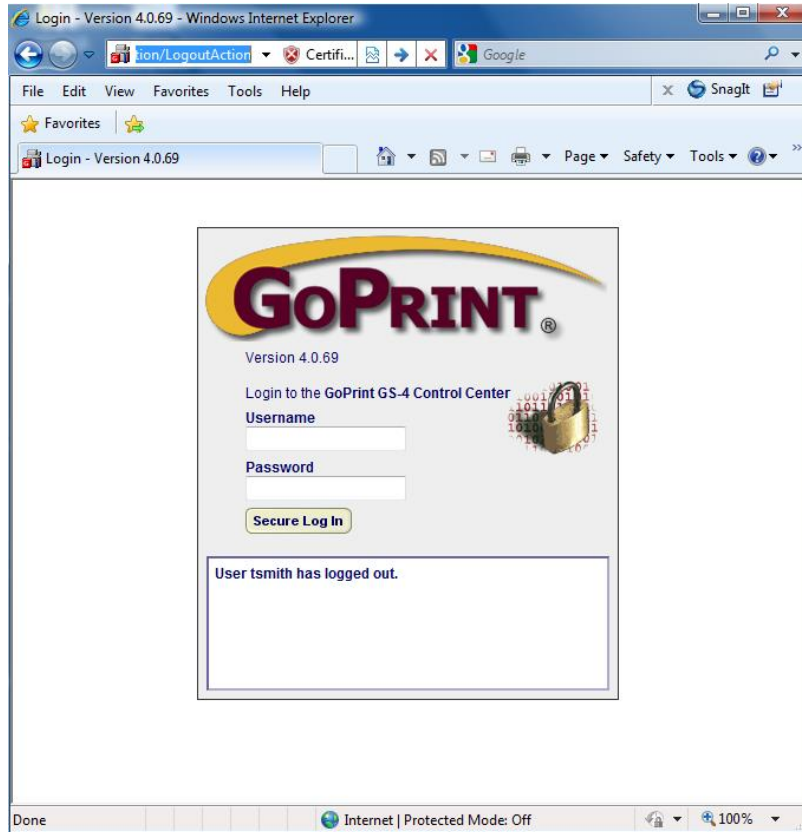
**Note:** if you require your cashiers to have these rights then you must grant the Cashier the GoPrint Users Admin ACL (Write) permission.



## Step 1 - Log in as the Cashier Account

Open a browser and type in the URL to the GoPrint server: <http://goprintservername:7768>

This information should have been given to you by your GoPrint administrator.





## Step 2 – Search for the User:

1. Accounts – Manager Users
2. Enter an existing Account ID or Last Name and click Search to find the specific user

The screenshot shows the GoPrint Account Search page. At the top, there is a navigation bar with the GoPrint logo, the text "Account Search", and a clock showing "5:42AM Fri 5/7". Below the navigation bar is a sidebar with links for "Home", "Accounts", "Help", and "Log Out". The main content area is titled "Accounts - Manager Users" and "Account Search". A red oval highlights the "Accounts - Manager Users" text. Below the title, there is a search form with the following fields: "Account ID", "Last Name", "Card #", "Records Per Page" (set to 100), "Active / Inactive" (set to Both), "Class" (set to Any Class), "First Name", "Email", "Ref #", and "Inactive Since" (with a calendar icon). A red oval highlights the "Account ID" field with the text "Search for user by Account ID, or Name". At the bottom of the form are "Search" and "Clear" buttons. To the right of the form is a "Related Activities" section with links for "Create a new account" and "Cashier Closing Report".



## Step 3 – Add Funds to the Account

1. Check the checkbox next to the users Account ID

**Found 3 Accounts** Check the checkbox next to the Account

<input type="checkbox"/>	Account ID	Full Name	Email	Card No	Ref No	Status	Last Updated
<input checked="" type="checkbox"/>	fred	Fred, goprint				Active	07/18/2011
<input type="checkbox"/>	JSMITH	Smith, Jay				Active	07/14/2011

## ADJUST BALANCE

1. Adjust Purse from the drop down select the Students Purse
2. Enter the Refund amount paid
3. Adjust Reason: select a customizable reason or type in one. (Required)
4. Payment Type: No Charge
5. Click the Adjust Balance button

### Change Account Attributes

Add to Class    
Misc. Action

### Adjust Balance

1. Adjust Purse  By Amount  2.  
Adjust Reason   3.  
Payment Type  4.  
 5.

The balance adjustment confirmation message appears at the top of the page





**Important:** If the incorrect dollar amount is added and an negative amount must be adjusted, the default Cashier Role does not have Rights to perform this task. The account must have the GoPrint Users Admin ACL Rights (write). Contact your GoPrint administrator for assistance.

## Step 4 - Confirm the Balance Adjustment

### Method 1

To confirm the adjustment, select the Cashier Closing Report





The current logged on Cashiers transactions appears:

You may Export the report as a PDF or Html for offsite viewing

Cashier Closing Report						
Account ID: Cashier1						
Tran #	Event Type	Event Date	Target Account ID	Credit	CloseOut	Payment
53	Deposit	5/7/10 5:27 AM	fred	5.00		Cash
55	Deposit	5/7/10 6:02 AM	fred	2.00		Cash
# of New Users:		0	# of Deleted Users:	0	User Totals	7.00

## Method 2

### Found 3 Accounts

Double-click on the users Account ID to enter their profile

<input type="checkbox"/>	Account ID		Email
<input type="checkbox"/>	<a href="#">fred</a>	Fred, goprint	
<input type="checkbox"/>	<a href="#">JSMITH</a>	Smith, Jay	
<input type="checkbox"/>	<a href="#">rict</a>	tadra, rick	

- Double-click on the users Account ID to enter their profile

Account Member Of Print Jobs  
Transactions Login History

### Member Of

Class Membership

Default User Class

(pick one)

- Select Member of

### Current Purses

Purse Name	Balance	Credit Limit Remaining
Default User Class - CBORD CSXML	---	---
Default User Class - University Print Funds (Quota)	1.00	0.00

- View their new balance under the Balance column



## User Profile Refunds

Optionally, you can make balance adjustments directly from the users profile. Both methods produce the same results, but applying adjustments under the users profile allows you to immediately compare the current balance to the adjusted balance without screen changes.

### Current Purses

Purse Name	Balance	Credit Limit Remaining
Default User Class - CBORD CSXML	---	---
Default User Class - University Print Funds (Quota)	1.00	0.00

Credit features are enabled. The maximum system credit limit is **20.00**.

### Adjust Balance

Purse:

Amount:

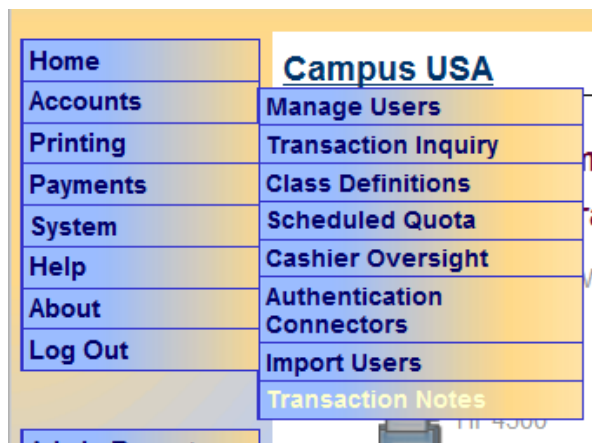
Adjust Reason:

Payment Type:

## Transaction Notes

The Adjust Reason feature is a solely customizable feature that must be enabled by the GoPrint administrator and set-up prior to attempting to adjust a user's balance. To do so navigate to:



1. Accounts – Transaction Notes





2. Add a Transaction Note

### Transaction Notes

ID	Note
1	
	
 Add a Transaction Note	

[Add a Transaction Note]



Click the Pencil icon to add a transaction note

3. Create an ID and enter a reason

### Transaction Note Properties

The transaction ledger note layout:  
(Transaction Type) for (Note) posted by (User updated by)

ID	<input type="text" value="2"/>
Note	<input type="text" value="Paper Jam Low Toner"/>

 Save  Delete

4. The new Transaction Note now appears as an Adjust Reason option

### Adjust Balance

Adjust Purse	<input type="text" value="(pick one)"/>	By Amount	<input type="text"/>
Adjust Reason	<input type="text" value="Faculty"/>		
Payment Type	<input type="text" value="Faculty"/> <input type="text" value="Paper Jam Low Toner"/> <input type="text" value="Other"/>		





## Close the Cashiers Drawer

At the end of the day, it's recommended to have the Cashier run The Closing Report so they can compare the monies received at the physical drawer.

The screenshot displays the 'GoPRINT Cashier Closing Report' interface. The header includes the GoPRINT logo, a 'Home' button, and user information for 'Cashier1' at '6:14AM Fri 5/7'. A navigation menu on the left lists 'Home', 'Accounts', 'Help', and 'Log Out'. The main content area features a 'Cashier Closing Report' title and a description: 'The Cashier Closing Report shows all Transactions matching the given criteria.' Below this, there are input fields for 'Start Date' (05/07/2010 12:00 AM) and 'End Date' (05/07/2010 11:59 PM), an 'Export' dropdown menu set to 'PDF', and a 'Run Report' button. A message states 'Successfully closed cashier drawer. Transaction # 56'. A table below shows the results:

Purse	Close Out Amount
NWV Print Funds	7.00



## Releasing Print Jobs from Control Center

### Optional administrator Rights

Cashiers can be granted the print operators role which allows them to release print jobs directly from the Web-based Control Center using their Cashier ID. To do so the following additional Admin permissions must be applied.

1. Print Job Control (ALL ACCESS)
2. Agents (ALL ACCESS)
3. System Admin (READ)

Feature	Permission	Feature	Permission
System Policy	Not Specified	GoPrint Users	All Access
Admin Users	Not Specified	PayStation	Not Specified
Web Client	Not Specified	PayPoint	Not Specified
DepositStation	Not Specified	Pricing	Not Specified
Rules	Not Specified	Agents	All Access
Print Job Control	All Access	Reprint Archive	Not Specified
Journal Entry	Not Specified	Non Financial Reports	Not Specified
Financial Reports	Not Specified	System Admin	Read Only
Admin From PayStation	Not Specified	Printer Catalog	Not Specified
Cashier Role	All Access	Payment Connectors	Not Specified
Copiers	Not Specified	Change Passwords	Not Specified
View the Dashboard	Not Specified		

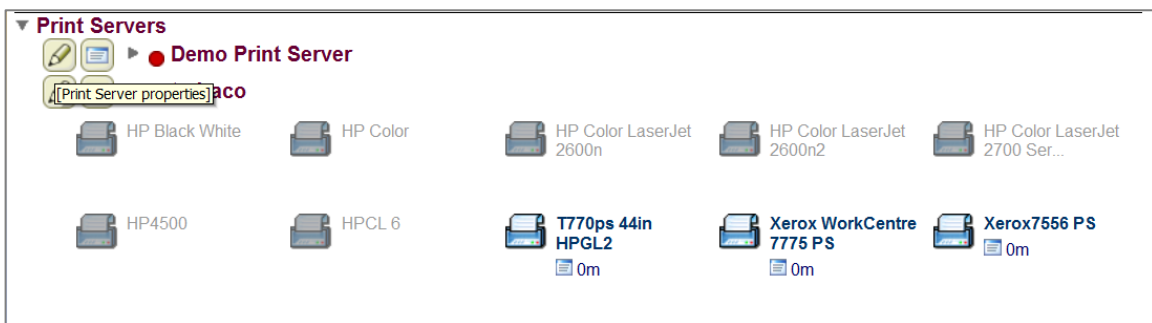


## Handling Refunds

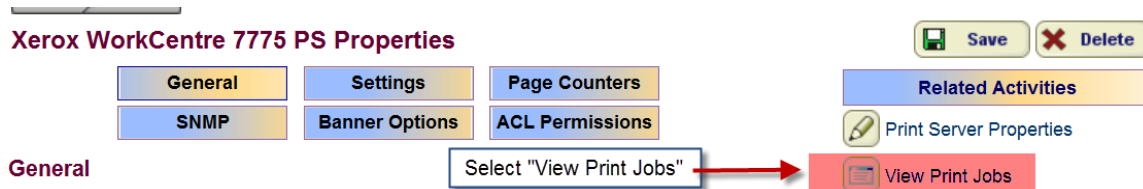
Instead of crediting the students account for poorly printed documents or when the printer is offline, staff members can log in to Control Center and have the student reprint the print and then elect to reprint the job either to the same print (when it comes back online) or redirect it to another printer.

### Step 1 – Select the Printer

Have the student resend the print job to the printer



### Step 2 – Select View Print Jobs



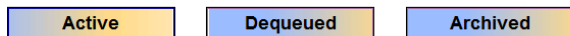


## Step 3 – Check the Students Print Job

1. Check the students print job
2. Select "Print Selected Job" or "Print Selected Jobs" to  
Both options send the print jobs directly to the printer at "no cost to the student".

**Note:** The job is then labeled as "Free" under GoPrint printing reports

### Active Print Jobs



Active print jobs that are currently being tracked by the GoPrint GS-4 system.  
This is the refresh time of the page in seconds. If it is less than 5, then the page will not refresh.

Refresh Interval

1 Active Job

<input type="checkbox"/>	Job #	Submit Date	Title	User	Machine	Status	Pages	Copies	Cost	Paid	Size	Paper
<input checked="" type="checkbox"/>	2	2011-07-18 10:28:28.641	Test Page	rick	rick 192.168.1.138	NO...						

Print selected jobs to (pick a target queue)

Discard selected jobs

Print selected jobs

Print selected jobs to (pick a target queue)

(pick a target queue)  
HP Black White  
HP Color  
HP Color LaserJet 2600n  
HP Color LaserJet 2600n2  
HP Color LaserJet 2700 Series PCL6  
HP4500  
HPCL 6  
T770es 44in HPCL 2

Check the students job

Select "Print Selected"

If the printer is still down, you can redirect it to another printer