MEMO

SUBJECT  
Sierra Recommendations module overview

TO  
Heather Jenks

FROM  
Mark Huppert

DATE  
27 February 2014

What it does
The Sierra Recommendation module lets users with Patron records fill out a web form. Staff convert this information to new Bibliographic and Order records by working through the sequence of dialogue boxes normally used in creating new records in the Cataloguing module. Staff can choose their preferred record templates. Information sent through form goes into title, author and publisher marc fields without rekeying. Staff can deny a request, ticking boxes for standard reasons that generate email to requestors. Part of the process is to check for duplication.

Public interface
Requesters access the form from this address:  library.anu.edu.au/acquire
We can tweak the form layout slightly but the main elements are “as is”.

Staff interface
Authorised staff access the administration module by choosing “Acquisitions -> Recommend” from the Go or Functions menu. Only one person at time can use the module but more than one can view the recommendations. “Approve” removes the request from the file. “Approve and Acquire” takes you through the steps of cataloguing and ordering before deleting the request. The ‘hold’ and ‘notify’ buttons in the Order record are linked to the requestor’s patron record automatically.

Deny Recommendations

<table>
<thead>
<tr>
<th>#</th>
<th>Notify</th>
<th>Selector</th>
<th>Title</th>
<th>Duplicate</th>
<th>Cost</th>
<th>Scope</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>✓</td>
<td>Huppert, Mark</td>
<td>Bobbing for Smiths</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Options for use

a. Selectors: Sierra can notify patrons about the disposition of their request. An Order record is created and a preferred fund and location is associated with the requestor's order. If you deny a recommendation, there are some canned email messages and reasons for denial. You can limit the display of requests by Selector name.

b. Unregistered recommenders: All the same functionality, except there is no default location or fund code associated with the Patron record.

### Test observations

- Users must log in with their Library barcode, including students.
- There is a time lag of several minutes between the Web form and Sierra.
- There is no option to edit or format the “Deny” messages.
- You can disable Selectors but not remove them.
- Requests are handled one-by-one.
References: Sierra manual

Processing recommendations:
- Creating authorised selectors: http://goo.gl/qA0xQg
- Viewing recommendations: http://goo.gl/C6RfXq
- Approving recommended titles: http://goo.gl/QWia0R
- Denying recommended titles: http://goo.gl/Lpiupa
- Acquiring recommended titles: http://goo.gl/K8zeFg
- Possible messages: http://goo.gl/GeVC0E