Australian National University
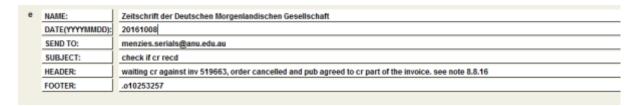
Creating a Tickler in Sierra for a single record

Purpose

This protocol contains instructions on how to set up email reminders (ticklers) in Sierra for important dates associated with specific records (order, holdings/checkin, license, and resource records only).

Procedure

To create a tickler for a single record:

1. Retrieve the desired record (e.g. order, holdings/checkin, license or resource).

2. Choose **Insert** and select from the drop-down list either:
   o the **Tickler** field for order and holdings/checkin records OR
   o the **Resource Managmt.Tickler** field for resource and license records.

3. Enter information relevant to the reminder being sent:

e	NAME:	Zeitschrift der Deutschen Morgenlandischen Gesellschaft
	DATE(YYYYMMDD):	20161008
	SEND TO:	menzies.serials@anu.edu.au
	SUBJECT:	check if cr recd
	HEADER:	waiting cr against inv 519663, order cancelled and pub agreed to cr part of the invoice. see note 8.8.16
	FOOTER:	.o10253257

   o **Name** — The name of the resource.

   o **Date (YYYYMMDD)** — Enter the date the tickler email should be sent in the Year/Month/Day format. **Note**: The system does not provide validation of this date field. If you enter the date in a different format, the system does not send email for your tickler.

   o **Send to** — The email address to which the tickler reminder is sent. You can enter multiple email addresses by separating each address with a comma and a space.

   o **Subject** — Enter a short description of the reminder – e.g.Claim invoice. **Note**: Sierra uses the default subject line *Sierra Reminder* if no subject is entered.

- o **Header** - Use this field for the specifics of the email reminder. This text is limited to 1,103 characters.

- o **Footer** — Use a simple identifier e.g. record number or resource ID.

   Note: The body of the email message is system-generated, and includes the record number for the record containing the tickler plus the title from the bibliographic record (for order and holdings/checkin record ticklers) or the Resource Name field from the resource record.

4. Choose OK.

   Note: Once the email reminder has been sent the Tickler field appears in a compressed display format into a Tickler log.

   To enlarge the Tickler: right-click on MARC tag **K** and choose **Expand Field.**

Related procedures

New monograph acquisitions notification
Placing an Item-level Hold in Sierra from the Summary Tab

Review date

This protocol will be reviewed 2 years after authorization.

Version control

1.0	Updated by Luciana Panei and Leanne Holgate	

Date: 1 August 2017

Authorised by

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