



POLARIS SYSTEM/DATABASE MAINTENANCE CHECKLIST

The following checklist is meant to be a guide to help you organize day-to-day administration of the Polaris System.

The frequencies we suggest are only recommendations. Your library may perform certain activities more or less often depending upon your needs and policies.

Daily

- ☐ Process Picklist
- ☐ Process Unclaimed List

Weekly

- ☐ Overdue and Billing (post to database) if not actually mailing

Monthly

- ☐ Unlinked Authority Record Set
- ☐ Unlinked Bibliographic Record Set
- ☐ Clear out the Import Jobs Queue
- ☐ Item status (Lost/Missing/Claimed)
- ☐ Items created on the fly
- ☐ Patron Code Changes (Youth to Adult)
- ☐ Material Type Changes (i.e. NEW Book to Book)
- ☐ In-Transit/Transferred items (if multiple branches)
 - Items Added
 - Items Delete
 - Titles Added
 - Statistical Summary Report

Yearly

- ☐ Run End of year Circ Count SQL Job
- ☐ Fiscal Year Rollover

As Needed

- ☐ Purge Cataloging records
- ☐ Check on-order item templates (need more for new material types?)
- ☐ Review collections, patron codes, material types
- ☐ Expired/inactive patrons
- ☐ Weed materials

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