

Sierra Profile evaluaton

Checklist

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

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

# After Initial Training

[ ]  Evaluate the Profile Load.

[ ]  Accept the Profile.

**Note:** For more information about Profile Acceptance, refer to [Profile Evaluation Guidelines.](https://iii365.sharepoint.com/%3Aw%3A/s/ITLCresources/EblZ2ZzaHbpOtvfNmJcA0PUB4zPm_KeR-wwwiWarzgF3UQ)

# During Profile Evaluation or After Profile Evaluation Acceptance

## **System Administration**

[ ]  For libraries using [Locations Served](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_admin_corner_loc_served2.html), if your location codes are finalized (all updates and changes are complete) and you have been trained on Locations Served, create Locations Served entries.

[ ]  Set up Users. See [Administering User Accounts](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_useraccts.html).

[ ]  Set up the [Limit Network Access table](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_limit_network_access.html).

## **Note:** For security purposes, Innovative recommends adding a last line of "all" that invokes an OPAC login in the telnet and remote login tables, if access to "all" is not set to "no".

## Database.

## **WebPAC**

[ ]  Set up [customizable forms](https://documentation.iii.com/sierrahelp/Default.htm#sril/sril_web_forms.html), including [mainmenu.html](https://documentation.iii.com/sierrahelp/Default.htm#sril/sril_mainmenu_form.html), [opacmenu.html](https://documentation.iii.com/sierrahelp/Default.htm#sril/sril_opacmenu_form.html), srchhelp\_<index tag>.html ([search help pages](https://documentation.iii.com/sierrahelp/Default.htm#sril/sril_searchhelp_pages.html)), and [advanced search help pages](https://documentation.iii.com/sierrahelp/Default.htm#sril/sril_advanced_search_pg.html).

[ ]  Set up [library information page](https://documentation.iii.com/sierrahelp/Default.htm#sril/sril_libinfo.html).

[ ]  Set up [Items for the Library to Acquire](https://documentation.iii.com/sierrahelp/Default.htm#sril/sril_acquire_web.html) form.

[ ]  Set up [Suggestions form](https://documentation.iii.com/sierrahelp/Default.htm#sril/sril_suggest_web.html).

[ ]  Finalize [Web Options](https://documentation.iii.com/sierrahelp/Default.htm#sril/sril_web_options.html).

[ ]  Finalize [Opac system options](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_options_opac_options2.html).

## **Data Loading**

[ ]  Finalize [Database Maintenance system options](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_options_database_mainte2.html).

[ ]  [Back up](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_backend_servers.html) the database as necessary during the load. Contact your implementation team if you have questions.

## **Other System Applications**

[ ]  Set up [Z39.50 Server](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_ac_z39_server_file.html) access.

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