

Sierra System Administration

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.

# Note: Innovative recommends that libraries create System Administration “checklist calendars” and schedule tasks for each module. Small libraries may have one central calendar, while larger libraries may need a calendar for each department.

# Daily

[ ]  Administer [server backups](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_backend_servers.html) (if not hosted)

[ ]  [View system messages](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_backend_sysfiles.html). Print and deliver messages requiring staff action to the appropriate staff. Clear the file daily after viewing.

**Note:** System messages may pertain to any module’s daily activities or to system administration functions.

[ ]  [Maintain record links](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_admin_corner_maintain_rec_links.html).

[ ]  Monitor the [Link Maintenance Report](https://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_maint_linkmaint_report.html) if the library runs [Overnight Daily Link Maintenance](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_admin_corner_daily_record_li.html).

# As Needed

## **General**

[ ]  Review [Patron Suggestions](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_backend_sysfiles.html) and proceed according to library policy.

[ ]  Delete outdated [substitution phrases](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_options_substitution_ph.html). Select the Database Maintenance option "Substitution phrases," print the list of phrases, and distribute a copy to each department. Ask staff to report outdated substitution phrases.

## **Database**

[ ]  Review [load tables, export tables, and index rules](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_admin_corner_codes_used.html) to ensure MARC tags, indicators, and subfields reflect ongoing changes. For example, if your library does not load the indicator for a given MARC tag, but the indicator is now valid for this MARC tag, contact Innovative Customer Support to request appropriate changes.

[ ]  View [MARC format validity tables](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_options_marc_format_val.html) and make sure that the tables reflect current practices.

[ ]  Maintain the [Z39.50](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_ac_z39_server_file.html) server file.

[ ]  Monitor [system-generated review files](https://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_lists_system_generated.html). Staff copying system-generated files should delete them when prompted (not all system-generated files prompt for removal), particularly Load and Overlaid files.

[ ]  Delete \*.marc and .errlog files once records have been checked. (After loading \*.marc files, delete \*.fts files before exiting Data Exchange.)

[ ]  Monitor record usage in [Database and Log Status](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_admin_corner_system_status.html). Note how many records of each type are available. Request more as needed.

[ ] Monitor database files and index blocks usage in [Database and Log Status](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_admin_corner_system_status.html).

[ ]  Monitor [login statistics](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_admin_corner_stats_login.html).

[ ]  Maintain [System Parameter Tables](https://documentation.iii.com/sierrahelp/Default.htm#sggenrec/sggenrec_maintainparams.html). See also [Configuration Files and Tables](https://documentation.iii.com/sierrahelp/Default.htm#sril/sril_configuration_tables.html).

[ ]  Maintain [templates](https://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_maint_templates_manage.html) for new records. Make sure all templates include a valid value in each fixed field. Before deleting a template, verify that the template code is not used by any system options or settings.

**Note:** Never delete a fixed-length code from a table before you have removed it from all records, all templates, all tables, and all system options in which it occurs.

[ ] Scan the database periodically to find records to clean up. For example:

* On-the-fly records
* Item records marked "withdrawn"
* Item records with certain library-specified codes
* Bibliographic records without attached Item records
* Bibliographic records whose attached Item records represent missing material.

**Note:** Use saved searches to streamline this process. For more information, see Saving Searches. If your library has Scheduler, set the searches to run regularly.

## **Hardware (if not hosted)**

[ ]  Clean the tape drive regularly.

[ ]  Replace the UPS battery as needed. (Battery replacement is the responsibility of the library.)

## **Security**

[ ]  Maintain [Password Policies](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_desktop_passpolicy.html).

[ ]  Maintain [Users](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_useraccts_auths_users.html) and remove those used by staff who no longer work for the library. Change the passwords of Users that remain on the system and that were used by staff who no longer work for the library.