Sierra Administrator Checklist for Libraries: The following Procedures Checklist is meant to act as a guide to help you organize the day-to-day administration of the Sierra System. The frequencies we suggest are recommendations and your library may perform certain activities more or less often depending upon your needs and policies. For notices, you may wish to run auto-notices instead of running them manually. If you would like to set up auto-notices, or if you have questions about performing any of these tasks, please contact Mid-Hudson Library System.

Immediately –
- ✓ *Open a ticket to remove Sierra staff accounts who are no longer needed when staff leave service email: techsupport@midhudson.org, provide staff first and last name*
- ✓ *Changes to your hours or closed dates should be reported to techsupport@midhudson.org. The dates manage processes in circulation and are displayed in Discover.*

Daily –
- ✓ Staff must run and fill paging requests (item and title).
- ✓ Process overdue and bill notices.
- ✓ Clear holdshelf and run the Clear Expired Holds and Holdshelf
- ✓ Monitor email for Notices, Alerts, bounced email, online registration and ILL

Weekly -
- ✓ Look at "Manage Holds" and determine causes for old unfilled holds. Delete requests that cannot be processed.
- ✓ Generate High-Demand Holds Report for purchase
- ✓ Review OverDrive Market Place holds reports for purchase
- ✓ Review online Registration records for merging if blocks

Monthly –
- ✓ Generate a report of previous Month's Statistics.
- ✓ Generate a report of Items that have been at the status "In Transit" too long. (saved search or Decision Center)
- ✓ Delete review files whose contents are no longer current or needed.
- ✓ Generate the Fines and Fees by Date Range report from Fines Paid.
- ✓ Review order records that have not come in within the last month. Cancel those that will not be filled. (if order recs. Are used).

Quarterly-
- ✓ Contact patrons expiring in next quarter for renewal
- ✓ Review items with Suppressed by MHLS annual report field

Annually-
- ✓ Review serials records for match points with physical collection (Saved Search-List of Magazine holdings)
- ✓ Review weeding reports in Decision Center
- ✓ Patron debt audit
- ✓ Review code errors in data entry using Create lists and statistics

1st Quarter-
- ✓ Remove items marked for discard – MHLS can do this by request

4th Quarter
- ✓ Create a list of items in discard status for your records

<u>**Things to know:**</u>
- ✓ MHLS does not delete member item records
- ✓ MHLS changes the annual report of items with a status of 'Lost & Paid', 'Discard', 'Claims Returned' for 3 months to "MHLS staff suppress", suppressing them from catalog view. (March, June, September & December)
- ✓ MHLS deletes patron records annually who are expired more than 3 years, owe less than $10 or have a debt greater than $10 that is more than 7 years old.
- ✓ Involve MHLS Technology operations in your projects – Labels, locations, closures, reports etc.