



The Accidental Sierra System Administrator

Jason Boland

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The Accidental Sierra System Administrator

- Systems Department
- Administering the ILS
- Data integrity
- Community
- Learning

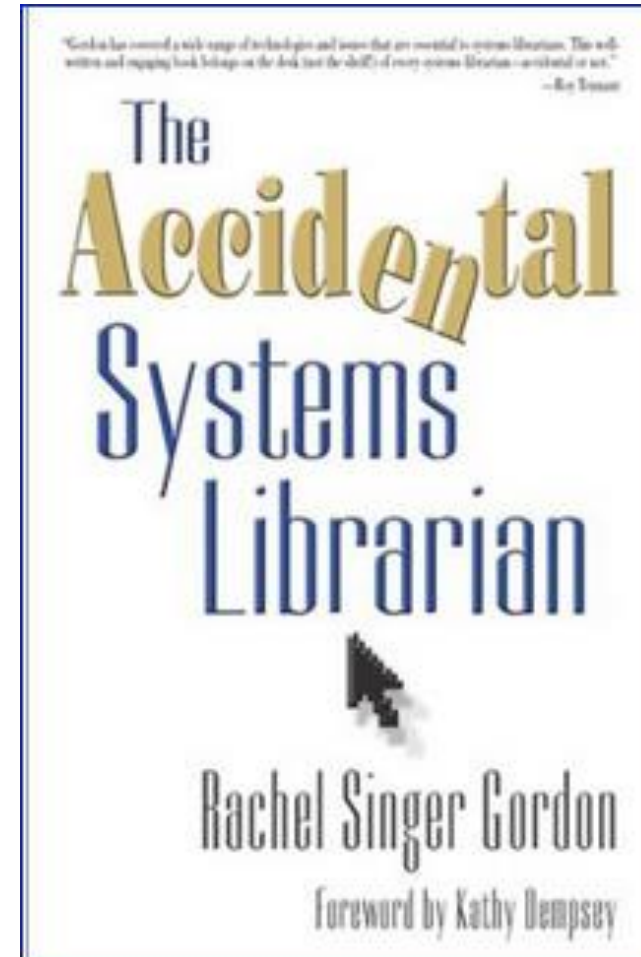
The Accidental Systems Librarian

Rachel Singer Gordon

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Google Preview: https://www.google.com/books/edition/_/f77CwJ2g0GAC?hl=en&gbpv=0



Systems Department

Department of one

- Integrity maintained
- Can be a bottleneck

Department of many

- Share the load
- Need consistent tracking of activity

Is there a systems hierarchy? (central/distributed system)

A single voice or a committee?

Administering the ILS

User logins

Global Settings

Parameter tables

Reporting

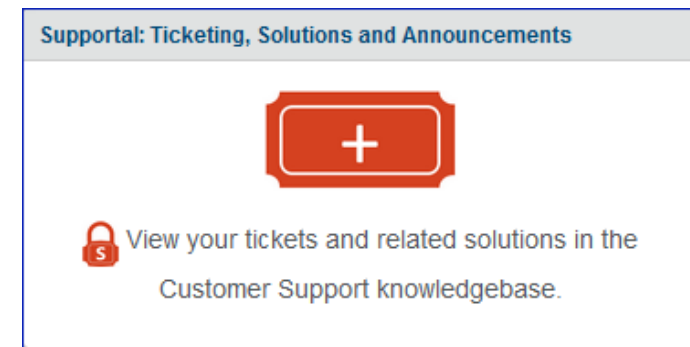
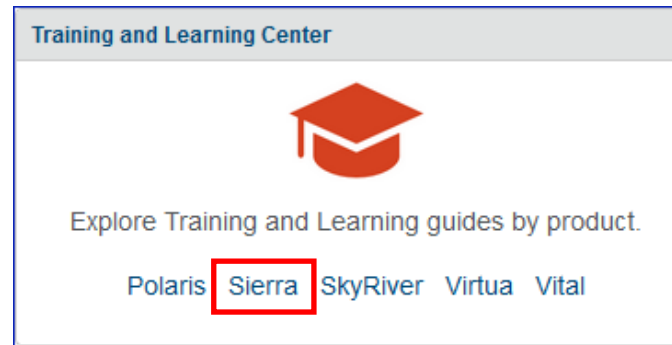
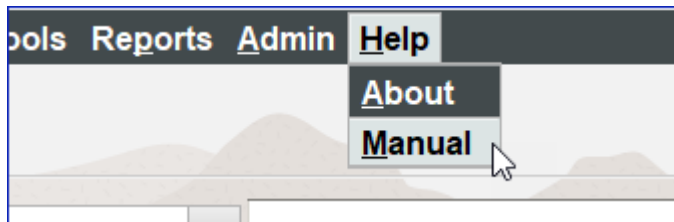
Administering the ILS

Know your resources!

User Manual: <https://documentation.iii.com/sierrahelp> (SDA: Help | Manual)

STLC: <https://support.iii.com> (Training and Learning Center | Sierra)

Supportal: <https://support.iii.com> (Requires Supportal Login)



Administering the ILS

Tools for the job

Sierra Admin (<catalog URL>/sierra/admin)

- User Admin
- System Files
- Server Administration (if not hosted)
- Review File Administration
- Scheduler
- API Keys

USER ACCOUNTS

[Authorizations and Authentication](#)

BACK END MANAGEMENT

[AWS](#)

[Servers](#)

[System Files](#)

[Review Files](#)

[Sierra Facets](#)

ENCORE

[Community Tags](#)

[Encore Customization](#)

[Patron](#)

[Encore Messages](#)

OTHER WEB APPLICATIONS

[Pathfinder Pro](#)

[Pathfinder Pro \(View Only\)](#)

[WebBridge LR](#)

[WebBridge LR \(View Only\)](#)

[Scheduler](#)

[Sierra API Keys](#)

Administering the ILS

User Admin

The image displays several overlapping screenshots of the ILS User Admin interface for a user named Jason Boland. The main interface includes a navigation menu with tabs for Basic Info, Applications, Permissions, Workflows, Options, Settings, and Preferences. The 'Basic Info' tab is active, showing fields for Full Name (Jason Boland), SDA Context Only (unchecked), Language (English), Locations served (Bay Street Library), User group (tsstaff), and Accounting unit.

Overlapping screenshots show other configuration areas:

- Assigned applications:** A list of applications including Admin App, Sierra Application, and Sierra SQL Access.
- Assigned permissions (421):** A list of permissions with a search filter, including ASRS Maintenance (365), Access review files (181), Access to web-based documents (198), and Add Message at Checkout.
- Assigned workflows (9):** A list of workflows with a search filter, including Cataloging (cat) 1, Circulation (circ) 2, Acquisitions (acq) 3, Serials (ser) 4, ERM (erm) 5, prog (Program Registration) 6, and Inter-Library Loan (ILL) 7.
- Workflows configuration:** A detailed view of workflow settings, including sections for AFFILIATION, ARTICLE REACH, DATA EXCHANGE, CLAIMING, CREATE LIS, and DISPLAY. The DISPLAY section includes options for Auto Notices, Load Bib and, Load Bibliog, Load CONSE, Load Name A, Load PATRO, Load Patron, and Load Resour.
- EDITOR configuration:** A detailed view of editor settings, including options for Show field group (label/tag), Show MARC tags/indicators, Show field group information for MARC fields, and Show MARC validation (Bibliographic).

Administering the ILS

Global Administration

The image displays four overlapping screenshots of the ILS administration interface, illustrating the navigation structure for Global Administration. Each screenshot shows a sidebar menu with the following items: [Users](#), [Applications](#), [Permissions](#), [Workflows](#), and [User Groups](#). The main content area of each screenshot shows the corresponding administrative page.

- Applications:** Shows a search bar "Filter list by typing here" and a dropdown menu for "Application" with items like "Admin App", "Circa", "Encore H", "Mobile V", "Sierra Ap", and "Sierra SC".
- Permissions:** Shows a search bar "Filter list by typing here" and a dropdown menu for "Permission" with items like "Access review (100 (101))", "Access to web", "Add Message", "Add orders to", "Additional Cou", and "Adjustments (3)".
- Workflows:** Shows a search bar "Filter list by typing here" and a dropdown menu for "Workflow" with items like "Acq AK (acquisitions Alecia)", "Acq Ordering (acq order clerk)", "Acq Ser Staff (mike)", "acq staff (acq staff)", "Acquisitions (acq)", "Acquisitions (Acqnoreports)", and "Administration (admin)".
- User Groups:** Shows a table with columns "User Group" and "Current Max". The table lists: "TOTAL" (50), "admin" (5), "edit1" (48), "initials" (0), and "just1" (1).

Administering the ILS

Tools for the job

Admin Corner

(https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_admin_corner_ssh_client.html)

- System Status (M > I > F > S)
- Codes Used (M > I > C)
- Restart a terminal (A > R)
- Locations served (A > A > L > S)
- Limiting network access (A > A > L > N)
- Z39.50 server file (A > A > L > Z)
- Global Settings (A > A > S > O)
- SCAT Table (A > A > S > N > G)

```
*** Copyright Innovative Interfaces Inc ***  
*** Sierra Admin Corner ***
```

```
D > Catalog DATABASE maintenance
```

```
C > CIRCULATION subsystem
```

```
M > MANAGEMENT information
```

```
A > ADDITIONAL system functions
```

```
X > Change Language
```

```
Q > QUIT
```

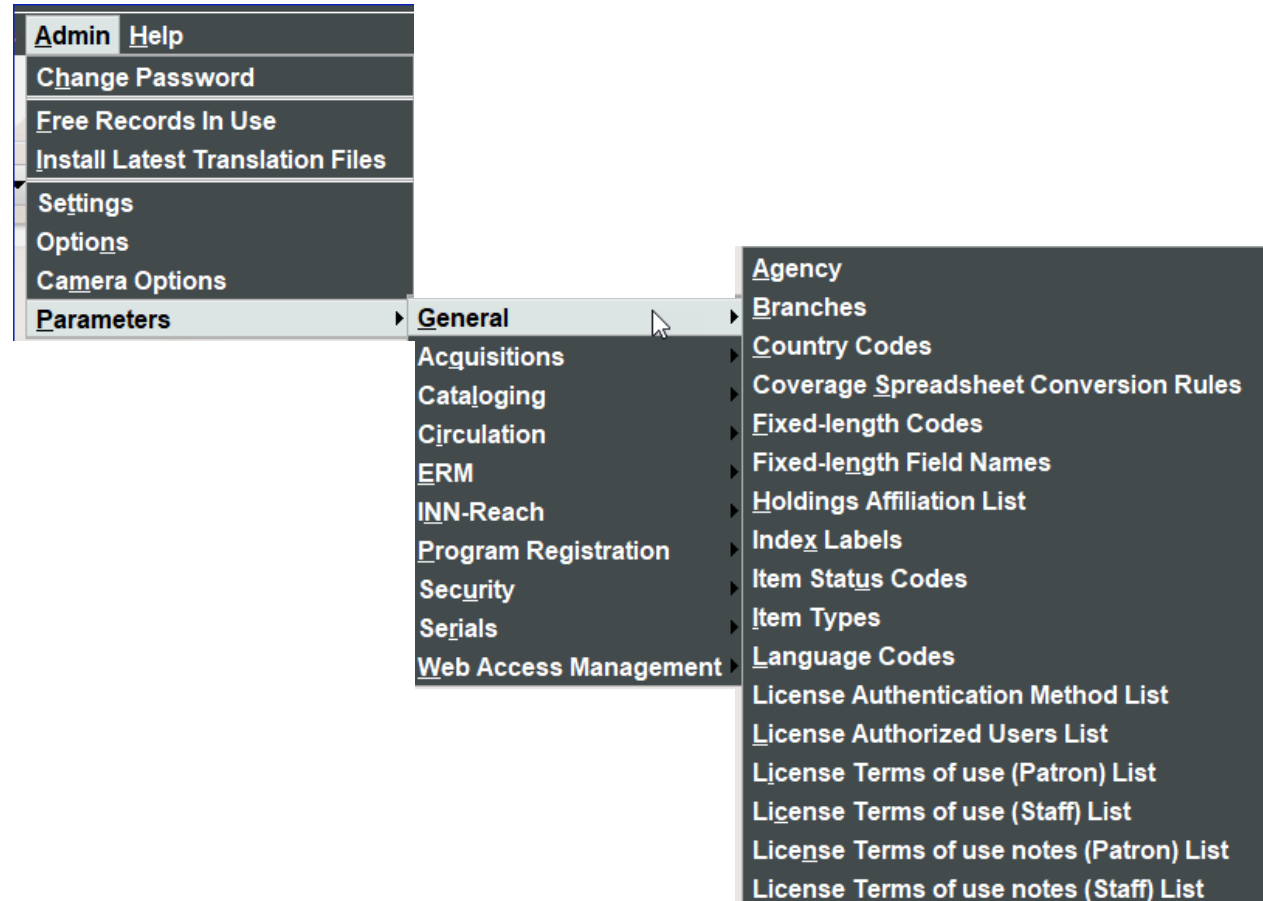
```
Choose one (D,C,M,A,X,Q) █
```

Administering the ILS

Tools for the job

Sierra Desktop Application (SDA)

- Parameter tables
 - **General**
 - Acquisitions
 - Circulation
 - Security
 - Serials

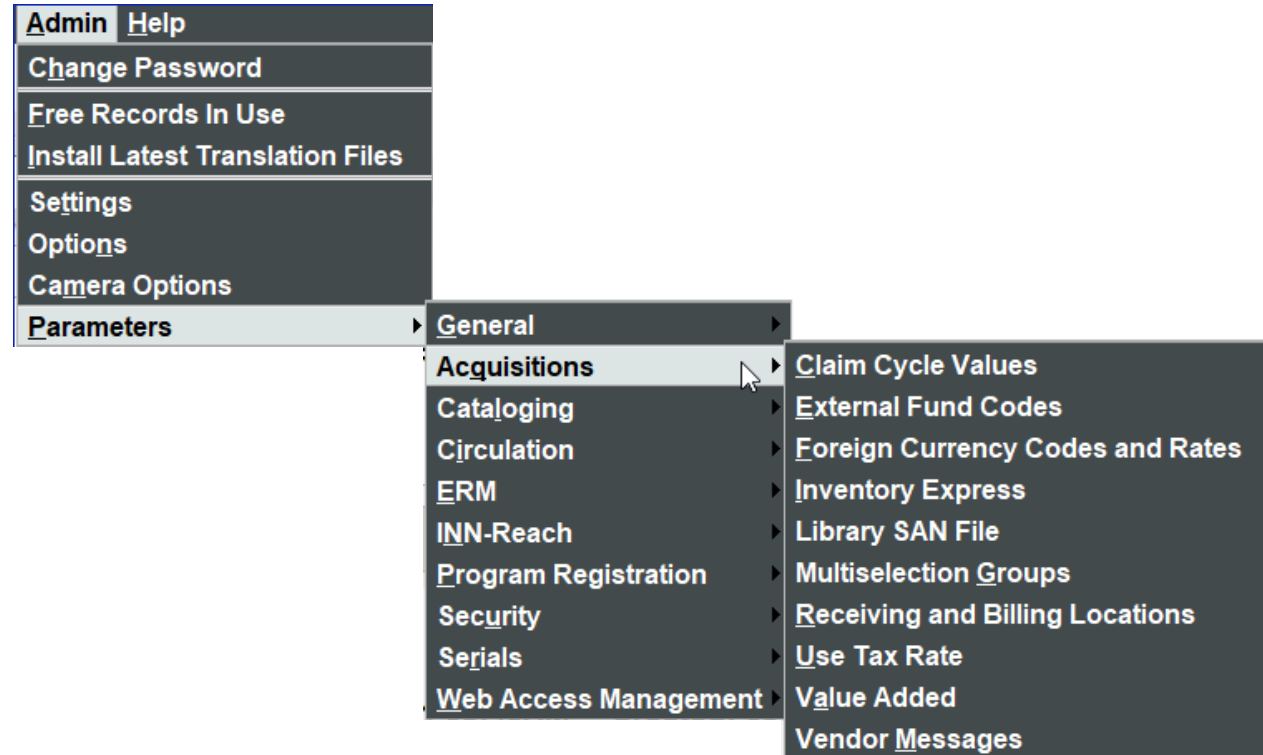


Administering the ILS

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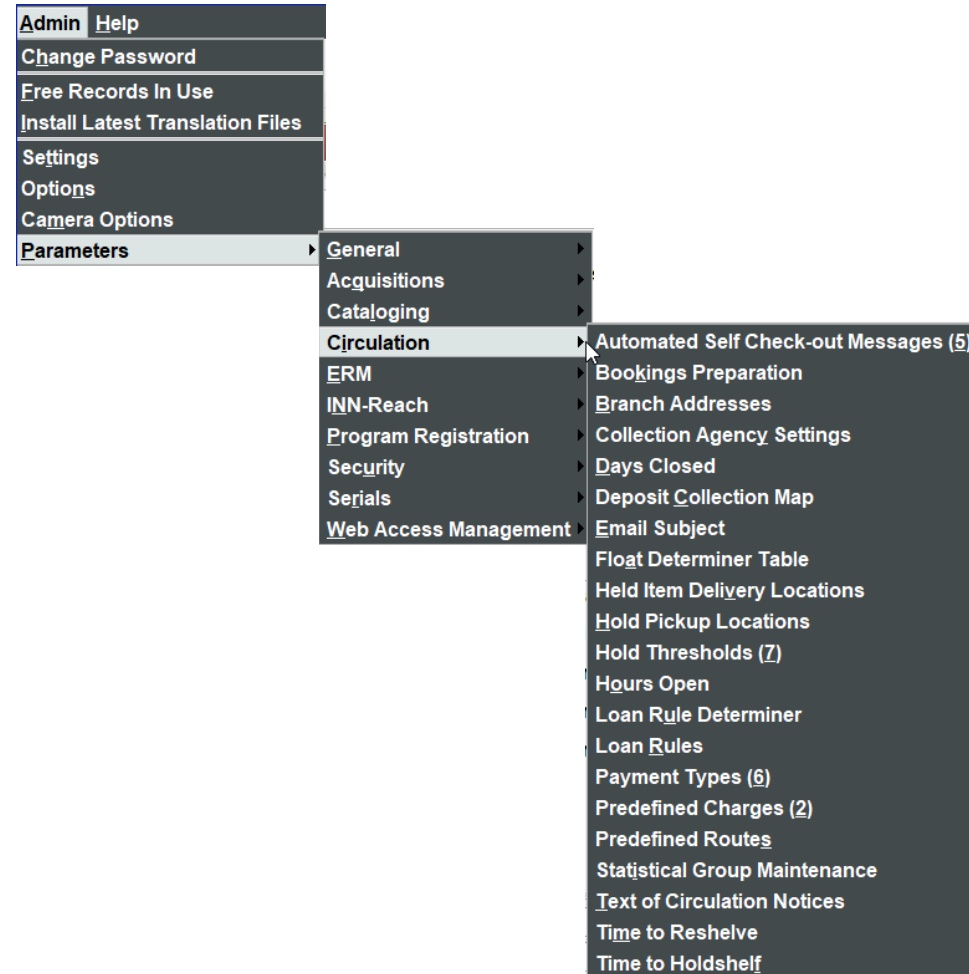


Administering the ILS

Tools for the job

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Administering the ILS

Tools for the job

Sierra Desktop Application (SDA)

- Parameter tables
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 - Serials

Password Policies

Basic Password Options

- Require password change on first login
- Require new password to differ from old

Password Composition Requirements

Minimum password length (length must be between 8 and 64 characters) 8

Minimum number of lowercase alphabetic characters 2

Minimum number of uppercase alphabetic characters 1

Minimum number of non-alphabetic characters 2

Minimum number of numeric characters 2

Minimum number of special characters (accepted special characters are !@#\$%^&()*_+={}[]'\"/>

Do not allow all-numeric password

Do not allow password and login to be identical

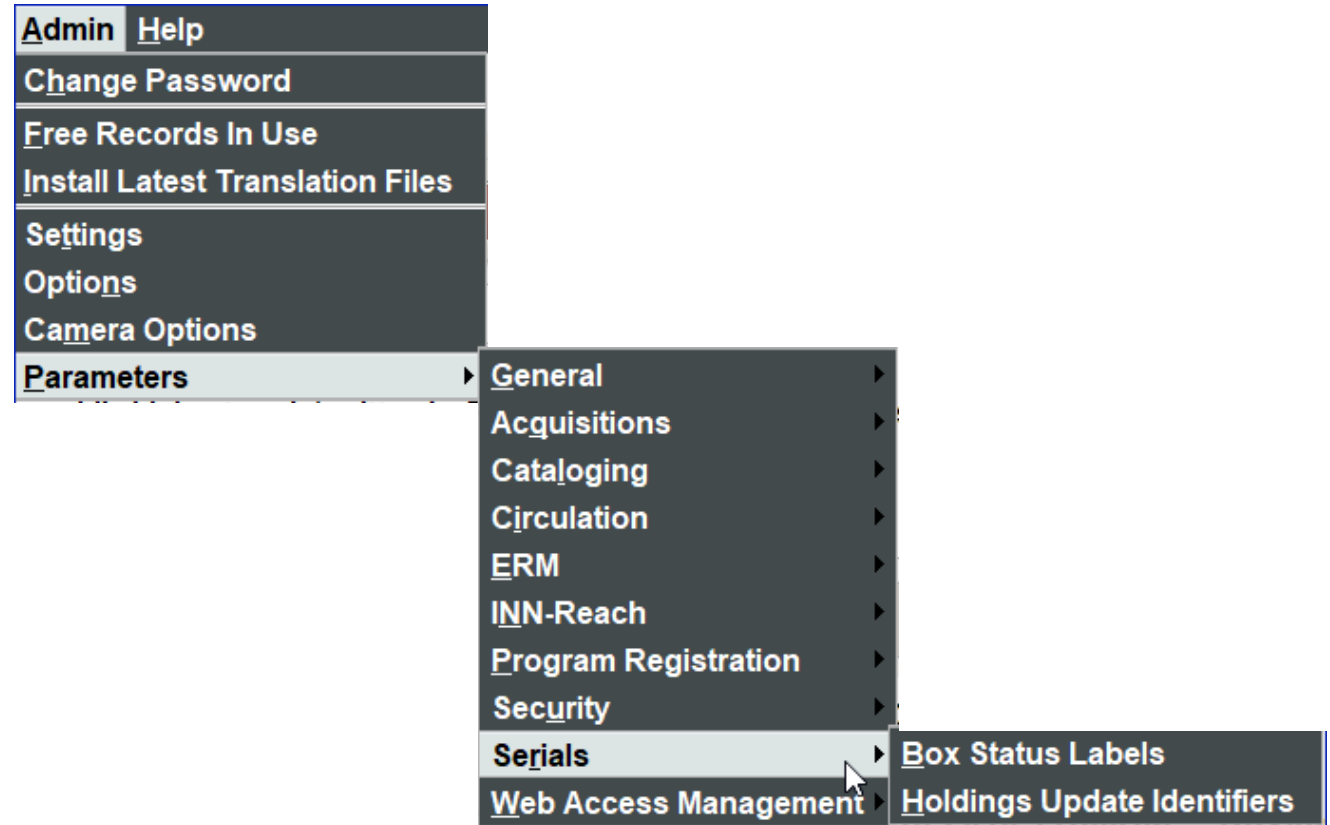
Save Cancel

Administering the ILS

Tools for the job

Sierra Desktop Application (SDA)

- Parameter tables
 - General
 - Acquisitions
 - Circulation
 - Security
 - **Serials**



Administering the ILS

Reports

- Create Lists
- Statistics
- Web Management Reports
- SQL

Administering the ILS

Create Lists generates a group of records (review file) based on criteria of fixed- and variable-length fields of the records or attached records.

- Number of records
- View/edit records
- Sort/extract data
- Interact with other Sierra programs
- System generated files

The screenshot displays the Sierra ILS interface. The main window is titled 'Sierra - Training and Learning Library - Jason Boland' and shows the 'FUNCTION Create Lists' dropdown menu. The 'Review Files' section is active, displaying a list of files with columns for File, Name, Current Re..., Max Records, Type, Status, Login, and Created [date/ti...]. The 'Boolean Review File: Has LDR and 007' window is open, showing a table of records with columns for Record and Description.

Record	Description
1 b10777362	Don Vicente : two novels / F. Sionil José.
2 b11006389	From my grandmother's grandmother unto me [videorecording] : ...
3 b11006390	Art dog [videorecording].
4 b11006419	Lord Peter Wimsey [videorecording] : Murder must advertise.
5 b11006547	The nutcracker [sound recording] ; Swan Lake / [Tchaikovsky]
6 b11006560	We're going to have a party [sound recording] / Markus.
7 b11006602	The complete Lionel Hampton quartets and quintets with Oscar P...
8 b11006638	The hidden light [sound recording] / Gregory Tardy.
9 b11006663	Water music [sound recording] ; The alchemist ; The musick for th...

Administering the ILS

Statistics provides breakdowns of coding within a group of records.

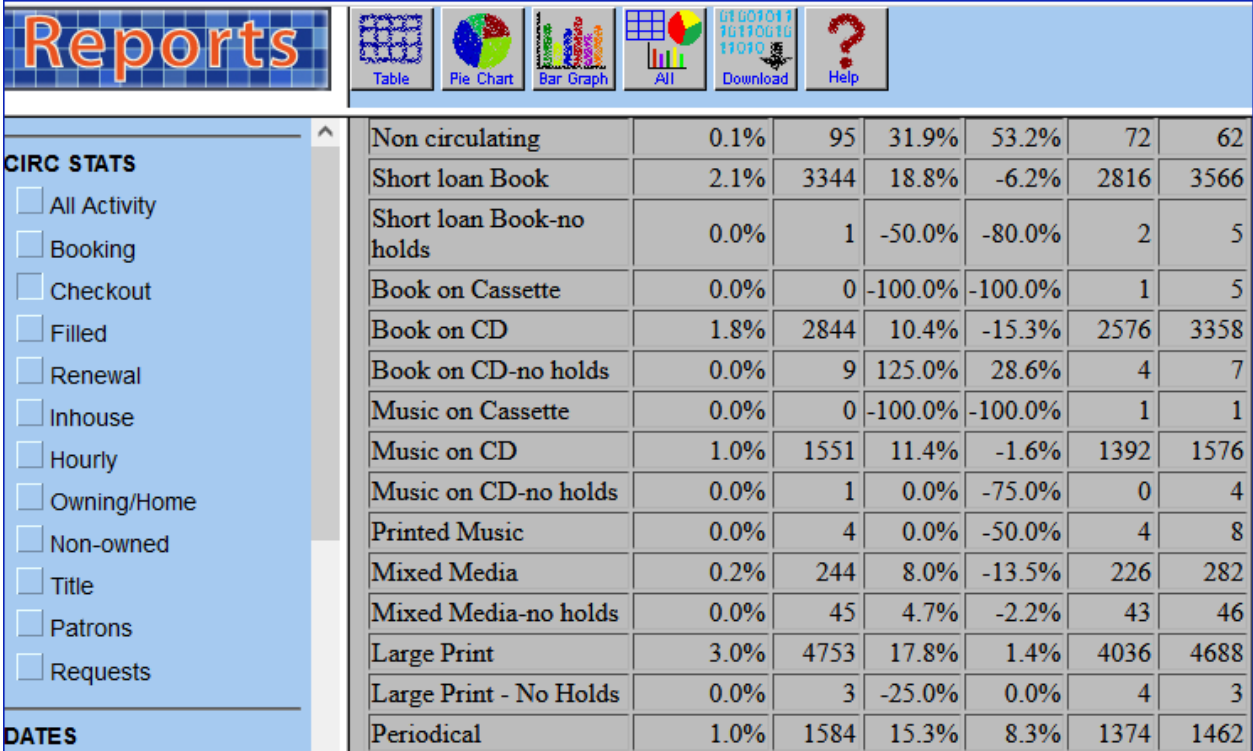
- Find overutilized codes
- Find underutilized codes
- Find bad codes
- Aggregates of other fields in record
- Export report

Code	Meaning	Record Count	Price	No. of Renewals	No. of Overdues
5	Cookbooks	3	\$16.99	0	0
8	Periodicals, Unbound	158	\$663.22	0	9
9	Periodicals, Bound	13	\$130.50	0	3
14	Video	18395	\$340,384.71	0	8
15	DVD	3953	\$89,327.65	0	11
16	CD, Spoken	3912	\$128,757.56	1	6
17	CD, Music	15989	\$287,033.92	0	5
18	Cassette, spoken	10942	\$349,888.02	0	6
19	Cassette, Music	105	\$1,417.19	0	0
20	Computer Multimedia	3536	\$86,531.01	0	0
21	Kit	33	\$3,115.03	0	15
5855			\$18.51	0	3

Administering the ILS

Web Management Reports provides transaction statistics. A good source of circulation statistics, but also cataloging, acquisitions and patron search.

- Many filters
- Export data
- Generate graphs









The screenshot shows a web interface titled "Reports". At the top, there are navigation icons for "Table", "Pie Chart", "Bar Graph", "All", "Download", and "Help". On the left, a sidebar titled "CIRC STATS" contains a list of filters with checkboxes: All Activity, Booking, Checkout, Filled, Renewal, Inhouse, Hourly, Owning/Home, Non-owned, Title, Patrons, and Requests. Below this is a "DATES" section. The main area displays a table with 8 columns of data for various categories.

Category	%	Count	%	%	Count	Count
Non circulating	0.1%	95	31.9%	53.2%	72	62
Short loan Book	2.1%	3344	18.8%	-6.2%	2816	3566
Short loan Book-no holds	0.0%	1	-50.0%	-80.0%	2	5
Book on Cassette	0.0%	0	-100.0%	-100.0%	1	5
Book on CD	1.8%	2844	10.4%	-15.3%	2576	3358
Book on CD-no holds	0.0%	9	125.0%	28.6%	4	7
Music on Cassette	0.0%	0	-100.0%	-100.0%	1	1
Music on CD	1.0%	1551	11.4%	-1.6%	1392	1576
Music on CD-no holds	0.0%	1	0.0%	-75.0%	0	4
Printed Music	0.0%	4	0.0%	-50.0%	4	8
Mixed Media	0.2%	244	8.0%	-13.5%	226	282
Mixed Media-no holds	0.0%	45	4.7%	-2.2%	43	46
Large Print	3.0%	4753	17.8%	1.4%	4036	4688
Large Print - No Holds	0.0%	3	-25.0%	0.0%	4	3
Periodical	1.0%	1584	15.3%	8.3%	1374	1462

Administering the ILS

SQL provides low level access to record, transaction and parameter data.

- Access to over 330 SQL tables
- Combine data in unique ways
- Power of SQL commands

	Bib Record character varying 	Title character varying (1000) 	Format text 	Holds bigint 	Items bigint 	Available Items bigint 
1	b1259352	Where the crawdads sing [CD sound recording]	Audio	0	4	4
2	b1259354	Becoming	Print	0	11	9
3	b1101557	Hamsters : a level one reader	Print	0	12	10
4	b1101703	Red angel : a novel	Print	0	10	9
5	b1259353	Where the crawdads sing / Delia Owens.	Print	0	8	6
6	b1101130	Over in the grasslands	Audio	1	20	18
7	b1259356	Waiting for the night song [sound recording (C...	Audio	1	7	5
8	b1259357	Waiting for the night song	Print	1	10	10
9	b1259355	Do no harm	Print	4	8	8
10	b1257402	Becoming [sound recording]	Audio	31	7	0

Data Integrity

- Effective staff communication
- Effective patron communication
- Good reports and statistics
- Improve decision making

Language	eng English	Cat. Date	04-04-2004	Suppression/Projects	- WILL DISPLAY
Skip	4	Bib Level	m MONOGRAPH	Country	xxu United States
Location	multi	Material Type	a PRINTED BK/JNL		

Select

2-D GRAPHIC k	3-D OBJECT r	ARCHIVAL MATL b	ARCHIVES v
Braille 7	Compact disc 4	E BOOK 1 1	E BOOKS 3
E BOOKS AROBAS @	ELECTR RESOURC l	ELECTRONIC RESOL m	EQUIPMENT y
FILM/VIDEO/DVD g	Large Print h	MANUSCRIPT t	MIXED MAT p
MS MAP f	MS MUSIC d	MTG ROOM z	Periodicals 2
PRINT MAP e	PRINTED BK/JNL a	PRINTED MUSIC c	REALIA x
Reserve files o	SOUND RECORD j	SPOKEN RECORD i	test s
UNKNOWN -	Vinyl LP 5		

OK Cancel

Data Integrity

- A good starting point is the System Status (M > I > F > S)
- For each record in the system, look at the fixed-fields that have a selection of choices
 - Use Create Lists and Statistics
- Produce strategies for matching the data to the requirements

INNOVATIVE SYSTEM STATUS				
RECORD TYPE	LAST REC#	CURRENT#	MAX ALLOWED	#DELETED
BIBLIOGRAPHIC	23435446	573178	900000	769826
ORDER	172583x	57546	80000	15031
CHECKIN	1063674	4896	50000	1452
AUTHORITY	10643898	60430	200000	3945
ITEM	17238547	515793	600000	206601
PATRON	10112091	3199	10000	8006
COURSE	10008081	79	1000	729
VENDOR	10006151	71	30000	544
INVOICE	10172592	16989	30000	267

Data Integrity

Variable-length data might serve a similar role.

- Make sure the data is used in a consistent manner.
 - In this example, Sarah Anderson could be S Anderson, SA, Sarah, etc. But it would be a difficult create list query to find all the variations.

New/Replace (C2)	a NEW
Order Code 3	- ---
Order Code 4	- ---
<hr/>	
Selector	Sarah Anderson
Blanket PO Number	mcm1228

Data Integrity

Once decisions are made about the data, use the parameter tables to make the changes

- Admin | Parameters | General
- Many data elements are updated in the Fixed-length Codes table
- Other data elements have their own table

	Name	Valid Codes
1	BIB LVL	
2	MAT TYPE	
3	BCODE3	
4	PCODE1	
5	PCODE2	
6	ICODE2	
7	MBLOCK	
8	STATUS	
9	IMESSAGE	
10	PMESSAGE	
11	ACQ TYPE	
12	CLAIM	
13	CODE1	
14	CODE2	
15	CODE3	
16	CODE4	

Valid Character	Meaning
k	KINDERGARTEN
1	FIRST GRADE
2	SECOND GRADE
3	THIRD GRADE
4	FOURTH GRADE
5	FIFTH GRADE
6	SIXTH GRADE

	Code	Branch Name	Public
18	eb	Bay St Branch Library	true
19	ebacm	Bay St Hyatt House Chri...	false
20	ebaf	Bay St Branch Adult Fict...	false
21	eban	Bay St Branch Adult No...	false
22	ebav	Bay St Branch Audio Vis...	false
23	ebj	Bay St Branch Juvenile	false
24	ebjcc	Bay St Branch Christine'	false
25	ebir	Bay St Branch Juvenile ...	false
26	ebmr	Bay St Branch Meeting ...	false
27	ebper	Bay St Branch Periodicals	false
28	ebref	Bay St Branch Reference	false
29	ebres	Bay St Branch Reserves	false
30	ebweb	Bay St Branch Internet R...	false
31	eill	Emeryville Interlibrary Lo...	false
32	ep	Emeryville Public Librari...	true
33	epaf	Emeryville Public Adult F...	false
34	epan	Emeryville Public Adult ...	false
35	enav	Emeryville Public Audio	false

Community

- Library and surrounding area
- Sign up on the Sierra listserv
 - Supportal:
<https://iii.rightanswers.com/portal/app/portlets/results/viewsolution.jsp?solutionid=160311093721934>
- Innovative Users Group
- Intl/ National/ Regional library and user groups

Learning

Opportunities for custom training, workshops and free content

Training: <https://www.iii.com/services/training-and-certification/>

Workshops: [https://bookwhen.com/innovative?tags\[\]=sierra](https://bookwhen.com/innovative?tags[]=sierra)

Free Content: Training and Learning Center (<https://support.iii.com>)

Materials in library and online

Community offerings



THANK YOU

Questions?