

Sierra Electronic Resource Management (ERM)

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.

# Daily

[ ]  [Load coverage data](https://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_coverage_load.html)

[ ]  [Review and manage deletion candidates](https://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_coverage_load_results.html) after a coverage load

# Yearly

[ ]  Review all resource, license, and contact records and update fields as needed (for example, resource renewal date, license status, etc.).

# As Needed

[ ]  Maintain [ticklers](https://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_maint_tickler_list.html). Add new ticklers and update existing ticklers if necessary.

[ ]  [Manually](https://documentation.iii.com/sierrahelp/Default.htm#sgerm/sgerm_use_statistics.html) or [automatically](https://documentation.iii.com/sierrahelp/Default.htm#sgerm/sgerm_use_statistics_auto.html) download statistics from your resource provider (optional).

[ ]  [Analyze resources](https://documentation.iii.com/sierrahelp/Default.htm#sgerm/sgerm_analysis_mode.html).

* [Title Overlap Reports](https://documentation.iii.com/sierrahelp/Default.htm#sgerm/sgerm_title_overlap.html)
* [Usage Statistics](https://documentation.iii.com/sierrahelp/Default.htm#sgerm/sgerm_analysis_mode.html)

[ ]   [Export Usage Statistics](https://documentation.iii.com/sierrahelp/Default.htm#sgerm/sgerm_usage_stats_view.html) to a spreadsheet.

[ ]  [Delete Usage Statistics](https://documentation.iii.com/sierrahelp/Default.htm#sgerm/sgerm_usage_stats_delete.html) that are no longer needed.

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