

# Training

## 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](#)
- ☐ [Review and manage deletion candidates](#) 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](#). Add new ticklers and update existing ticklers if necessary.
- ☐ [Manually](#) or [automatically](#) download statistics from your resource provider (optional).
- ☐ [Analyze resources](#).
  - [Title Overlap Reports](#)
  - [Usage Statistics](#)
- ☐ [Export Usage Statistics](#) to a spreadsheet.
- ☐ [Delete Usage Statistics](#) that are no longer needed.

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