

### Sierra Electronic Resource Management

Electronic Resource Management (ERM) allows you to manage the relationship between your library and providers of electronic metadata and text, such as abstract, index, and full-text databases, including databases of serials in electronic format.

This agenda will be covered by a combination of live webinar and in person training.

Underlined segments in this agenda are web hyperlinks. Please click on the link to be directed to the appropriate page in Sierra WebHelp. If you encounter difficulty following the links, try the links on Chrome, or go directly to <http://csdirect.iii.com/sierrahelp>, log in and search for the topic.

This class schedule is flexible and subject to change.

#### Introduction

- Introduction of trainer and trainees
- Logging into the Sierra Desktop
- ERM Uses Overview
  - Resource and License management
  - Ability to track resources cost using with order records
  - Integrate e-resource journal titles in Sierra and discoverability in Encore (individual subscriptions, packages, aggregators)
  - A-Z list of resources
  - Reporting and analysis

#### Displaying ERM records in Encore and A-Z List (introduction)

- Databases A-Z list
- Resource and license data display in Encore

#### Record types created in ERM

- Record data fields for record types normally used in ERM
  - Fixed-length fields.
    - Fixed-length fields in resource records
    - Fixed-length fields in holdings records
    - Fixed-length fields in license records
  - Variable length fields
    - Variable-length fields in resource records
    - Variable-length fields in holdings records
    - Variable-length fields in license records
    - Variable-length fields in contact records

# ERM Training Agenda

- Mandatory fields ( variable-length fields required to save a record)
- Soft linking records in ERM (Related orders and Related holdings).

## Catalog Functions

- Creating resource records
  - Viewing and editing restricted variable-length fields (Manager view and Manager edit fields)
  - Maintaining multi-value variable-length fields (Controlled Vocabulary)
- Creating license records
  - Viewing and editing restricted variable-length fields (Manager view and Manager edit fields)
  - Maintaining multi-value variable-length fields (Controlled Vocabulary)
  - Transferring attached records (Transfer license record from one Resource record to another)
  - Linking License records to additional Resource records
- Creating contact records for resources
  - Viewing and editing restricted variable-length fields (Manager view and Manager edit fields)
- Using Email reminders (Ticklers)
  - Managing tickler rules
- Soft linking records in ERM
  - Creating related Holdings records from the Resource record display
  - Creating related Orders records from the Resource record display
- Creating Order records (associated with Resource records)
- Viewing financial reports (costs associated with resources)

## Analyzing resources

- Usage statistics
  - Importing usage statistics automatically
  - Importing usage statistics manually
  - Exporting ERM usage statistics to a spreadsheet
  - Deleting usage statistics
- Usage analysis – ERM summary reports
  - Creating summary reports
  - Creating detail reports
    - ERM titles detail reports
    - ERM graph detail reports
    - ERM decile analysis detail reports
- Reporting on title overlap in electronic resources

## Additional functions

## ERM Training Agenda

- Delete records (individual record deletions)
  - Resources
  - License
  - Contact
- Creating lists (review files)

### **Displaying resource records in Encore and Resource A-Z List**

- A-Z list Search help page
- Encore resource and License

### **Additional Resources**

- Sierra WebHelp – Browse Tab
- Sierra Knowledge Base

Please feel free to evaluate your training experience by filling out the Training Survey form.

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