The New and Improved
Alma Overlap Analysis Tool

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Alma

IGELU
Conference
12th –15th September 2022

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Agenda

- **Tool introduction**

- **What is the problem?**

- **How does the tool solve the problem?**

- **What's in it for you?**

- **How can the tool help reduce your library's expenses?**

- **Future plans**

- **5 Key Takeaways**

- **Questions**

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Tool Introduction

Introduction - What is the Overlap Analysis Tool?

- This tool compares e-resources and provides reports about their overlapping status

- It assists making decisions for purchasing or canceling e-resources

- It helps the library to achieve easy and better collection-development management

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Introduction – What's New?

Improved Overlap Analysis Tool

- New functionality introduces support for additional use cases

- New interface and intuitive report creation

- New UI results summary

- Improved reports history list

- These changes were introduced in the March 2022 Alma release

Introduction - Access the Overlap Analysis Tool

The Overlap Analysis is accessed at Alma Menu > Resources > Advanced Tools > **Overlap and Collection Analysis**

Introduction – The New Overlap Analysis Tool

Overlap and Collection Analysis (1 - 15 of 15)

Report Name ▼ [   ] 🔍   Sort by: Creation Date ▼ ⬇   ⋯   ⊕ **New Analysis** ▼   ⊖ Remove Selected   ⇥   ☰▼

1 ☐	**New Report 2022-08-10 11:40:41** Compare Collections ✓ Completed Successfully	Creator **UriB613** Creation Date **08/10/2022 12:40** Start Time **08/10/2022 12:42** Finish Time **08/10/2022 12:42**
2 ☐	**New Report 2022-08-04 11:30:23** Compare Collections 🕐 Draft	Creator **meehan** Creation Date **08/04/2022 12:30**
3 ☐	**New Report 2022-08-04 11:13:05** Compare Collections 🕐 Draft	Creator **meehan** Creation Date **08/04/2022 12:13**

✕

Compare Collections

Use this report to compare a collection with one or more collections

Look Up Titles

Upload a file and check their existence in Alma

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Introduction - Improved Reports History List

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Introduction - Improved Reports History List

Overlap and Collection Analysis (1 - 15 of 15)

Report Name ▼

Sort by: **Creation Date** ▼

➕ New Analysis ▼   ⊖ Remove Selected

1	☐	**New Report 2022-08-10 11:40:41**	Creator **UriB613**	View report •••
		Compare Collections	Creation Date **08/10/2022 12:40**	Remove From List
		✓ Completed Successfully	Start Time **08/10/2022 12:42**	
			Finish Time **08/10/2022 12:42**	

2	☐	**New Report 2022-08-04 11:30:23**	Creator **meehan**	Edit •••
		Compare Collections	Creation Date **08/04/2022 12:30**	
		🕐 Draft		

3	☐	**New Report 2022-08-04 11:13:05**	Creator **meehan**	Edit •••
		Compare Collections	Creation Date **08/04/2022 12:13**	
		🕐 Draft		

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Introduction - Improved Reports History List

Introduction - Improved Reports History List

Overlap and Collection Analysis (1 - 15 of 15)

Report Name ▾

Sort by: Creation Date ▾ ↓

New Analysis ▾   ⊖ Remove Selected

3 rows selected   Clear Selection

1 ☑ **This is my Report Name**
This is my report's description
Compare Collections
⊘ Completed Successfully

Creator **UriB613**
Creation Date **08/10/2022 12:40**
Start Time **08/10/2022 12:42**
Finish Time **08/10/2022 12:42**

View report

2 ☑ **New Report 2022-08-04 11:30:23**
Compare Collections
🕐 Draft

Creator **meehan**
Creation Date **08/04/2022 12:30**

Edit

3 ☑ **New Report 2022-08-04 11:13:05**
Compare Collections
🕐 Draft

Creator **meehan**
Creation Date **08/04/2022 12:13**

Edit

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Introduction – New Comparing Options

To support new use cases, new comparing options have been added:

NEW Ability to select a **Community or Network Zone e.collection as a source** for comparison

NEW Ability to select the **entire Institution Zone as a target** for comparison **in one click!**

NEW Ability to select the **entire Network Zone as a target** for comparison **in one click!**

ℹ️ For more information see <u>Working with Overlap and Collection Analysis</u>

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What is the Problem?

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What is the Problem?

Budget

Budget reduction due to global recession and Covid-19

Abused budget due to payment for overlapping electronic resources

Continuous need for new purchases to stay updated with new publications of legacy and new journals

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What is the Problem?

Comparison Capabilities

Manually – almost impossible

Using 3rd party comparison provides only limited capabilities

Saving the analysis reports for future review

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How does the Alma Overlap Analysis Tool Solve the Problem?

How does the Alma Overlap Analysis Tool Solve the Problem?

One System

Direct access to IZ, CZ, NZ electronic resources which enables easy generation of complicated reports

Intuitive User Experience

Easy workflow for generating the desired report
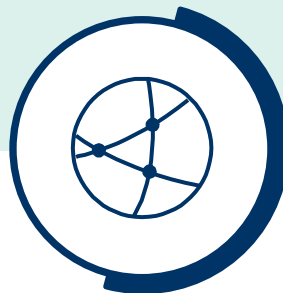
Analysis Reports

Clear UI summary report and a dedicated excel report for each overlapping report type

History Reports

History analysis reports are saved in Alma for future review

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How Does the Alma Overlap Analysis Tool Solve the Problem?

The tool can perform two types of analyses:

1 | "Compare collections":

Compare one IZ / NZ / CZ e.collection with one / many e.collections from either IZ (+All) / NZ (+All) / CZ

Compare with collections from:
- ⚪ Selected collections from Institution Zone
- ⚪ Selected collections from Network Zone
- ⚪ Selected collections from Community Zone
- ⚪ Entire Institution Zone ⓘ
- 🔵 Entire Network Zone
  - 🔵 Include only the electronic collections available for my institution in the Network Zone
  - ⚪ Include only the electronic collections not available for my institution in the Network Zone
  - ⚪ Include all the electronic collections available in the Network Zone

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How Does the Alma Overlap Analysis Tool Solve the Problem?

1 | Compare collections (Continue):

Supported matching identifiers: **ISSN , ISBN , Title , LCCN , 035**

Supported analysis reports:

No Coverage included

Include date coverage in the comparison : ☐

Titles of portfolios **with overlap**

Titles of portfolios **with no overlap**

Coverage included

Include date coverage in the comparison : ☑

Titles of portfolios with **complete coverage overlap**

Titles of portfolios with **partial coverage overlap**

Titles of portfolios with **no coverage overlap**

Titles of portfolios with **no overlap**

For consortia members only:

Titles of portfolios **not available for selected Available For Group**

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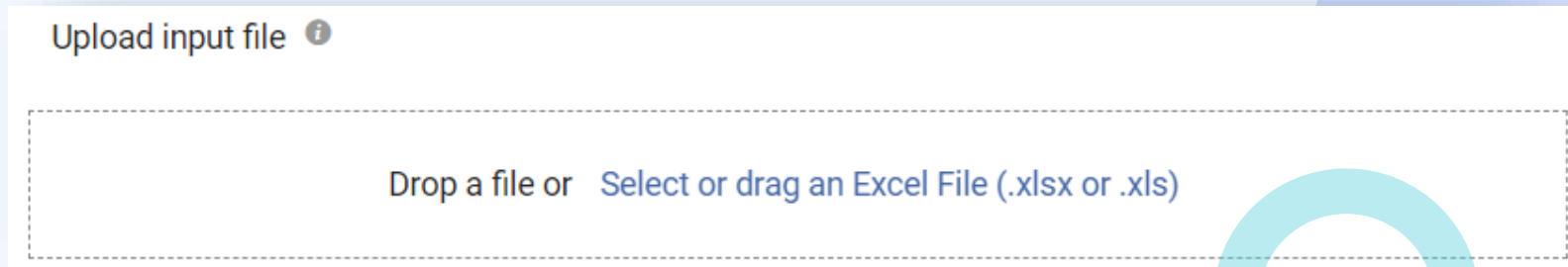
How Does the Alma Overlap Analysis Tool Solve the Problem?

The Alma Overlap Analysis Tool can generate the following Analyses:

2 | "Look Up Titles":

Compare a list of identifiers file:

Upload input file ⓘ

Drop a file or   Select or drag an Excel File (.xlsx or .xls)

Supported identifiers: **eISSN/ISSN , eISBN/ISBN , LCCN , Title**

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How Does the Alma Overlap Analysis Tool Solve the Problem?

2 | Look Up Titles (Continue):

Compare it with one or more of the following populations:

Select the populations you would like to compare the titles from the input file with: *

☐ Institution Zone Electronic Resources (including Community Zone activated electronic resources)

☐ Community Zone non-activated electronic resources

☐ Network Zone electronic resources available to my institution

☐ Network Zone electronic resources not available to my institution

Choose the report output format *

◉ One excel line per match

○ One excel line per identifier from input file

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How Does the Alma Overlap Analysis Tool Solve the Problem?

2 | Look Up Titles (Continue):

The supported reports are:

Titles of Portfolios with overlap

Titles of Portfolios with no overlap

Analysis Report

371
100%

74 (19.95%)Titles of Portfolios with no overlap

Titles of the Portfolios of the electronic collection selected for comparison (source) that are not part of the electronic collection/s compared with (target)

297 (80.05%)Titles of portfolios with overlap

Titles of the Portfolios of the electronic collection selected for comparison (source) that are part of the electronic collection/s compared with (target)

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What's in it for You?

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What's in it For You?

Upgrades the Library's E-Inventory Management Capabilities:

Save Time

Compa... ...tronic
coll... ...easy task.
U...
A...
c... ...st and
a... ...time so
yo... ...er
impo...

Time is Valuable!

Make Smart Decisions

Having th... ...Analysis
tool ... ...and
com... ...e
ove... ...ronic
col... ...u
wit... ...ation
to m... ...ata
driven d...

If You Cannot Measure it - You Cannot Manage it!

Cost Saving

Being abl... ...te an
Overl... ...s,
assi... ...rect
sma... ...sing
or c...
coll... ...ation
unde...
duplica...

Smart Budget Usage!

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How can the Overlap Analysis Tool Help Reduce Your Library's Expenses?

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Example Use Case #1 – Canceling an IZ Electronic Collection

Existing IZ vs. **Entire IZ**

Entire
Institution-Zone
E-Resources

Significant Overlap?

E.Collection
you consider
canceling

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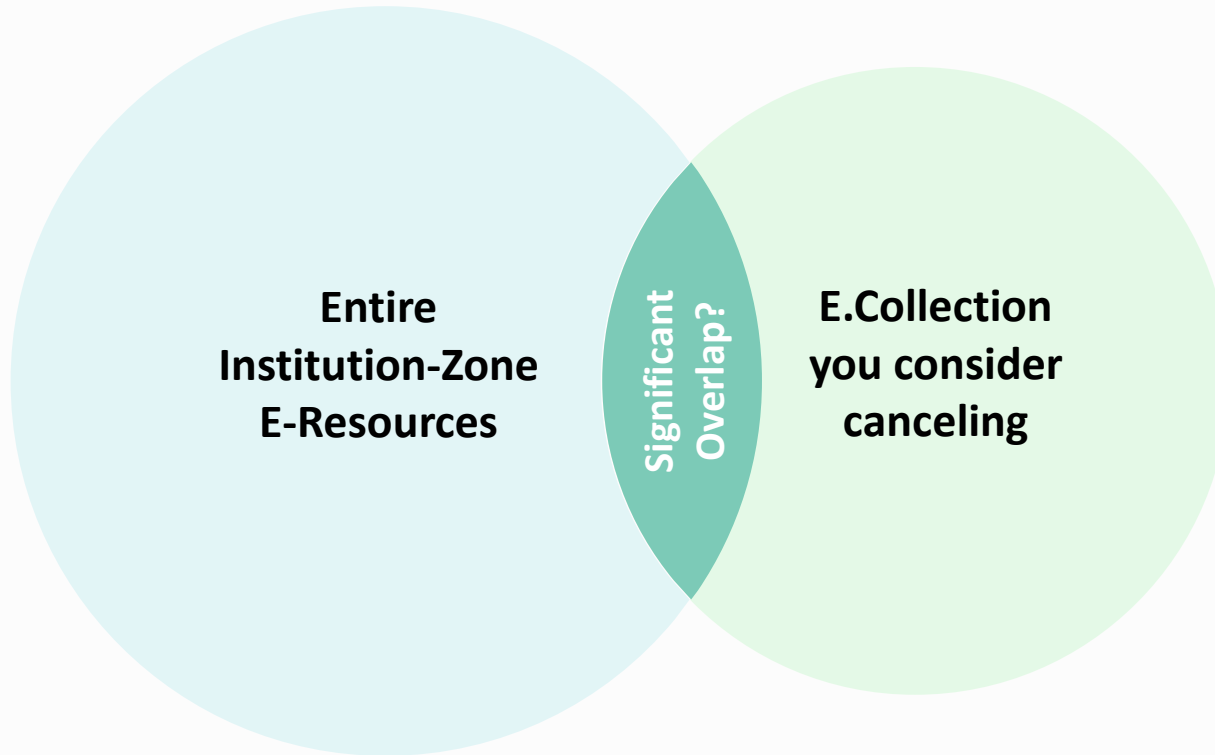
Example Use Case #2 – Purchasing a New CZ E.Collection

Option #1: New CZ vs. Entire IZ

Entire
Institution-Zone
E-Resources

Significant
Overlap?

New
Community Zone
E.Collection

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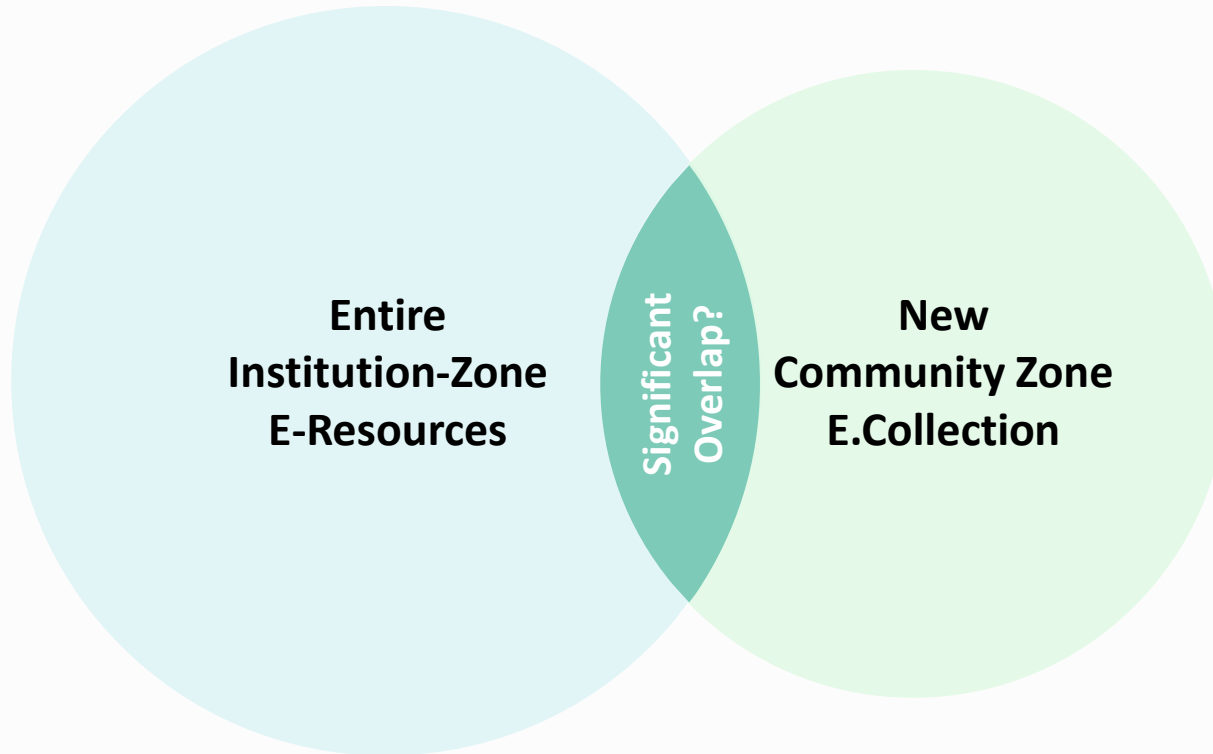
Example Use Case #3 – Purchasing a New CZ E.Collection

Option #2: **New CZ #1** vs. **New CZ #2**

Community Zone E.Collection #2

Overlap?

Community Zone E.Collection #1

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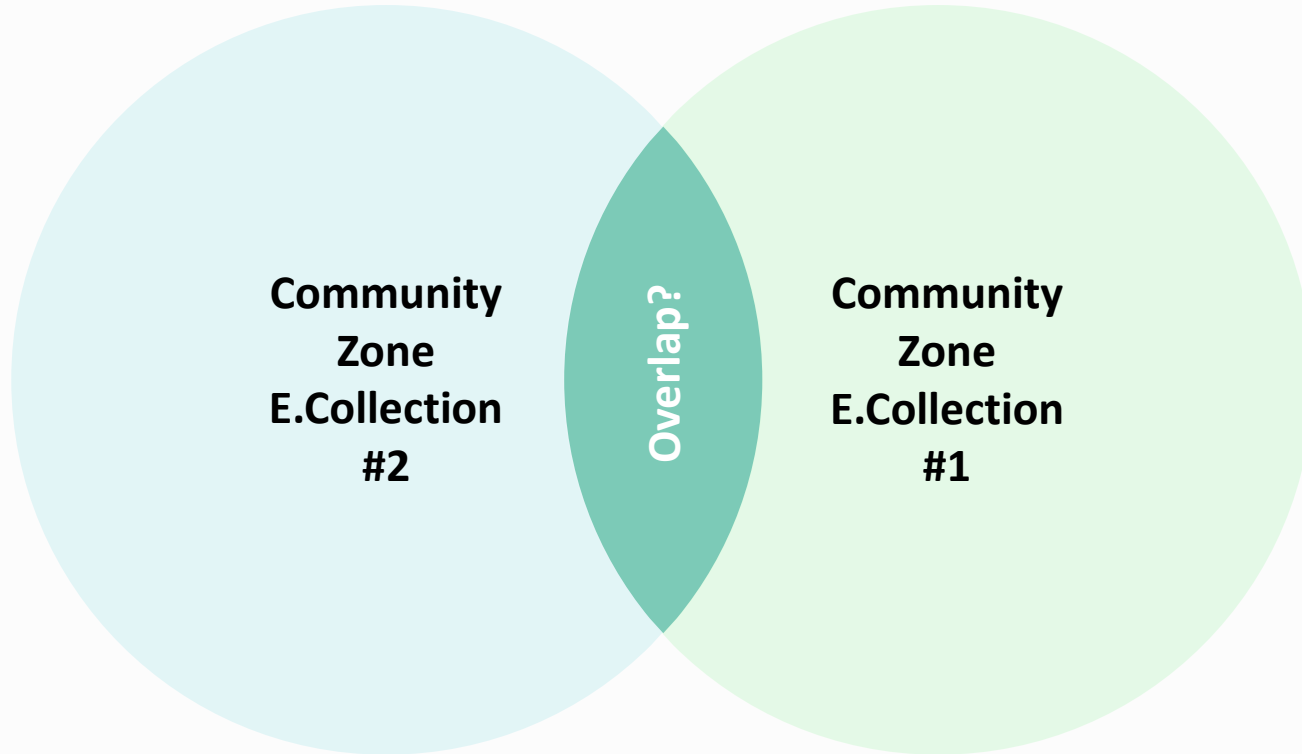
Example Use Case #4 – Purchasing List of Titles

List of Titles **vs.** **Entire IZ**

Entire
Institution-Zone
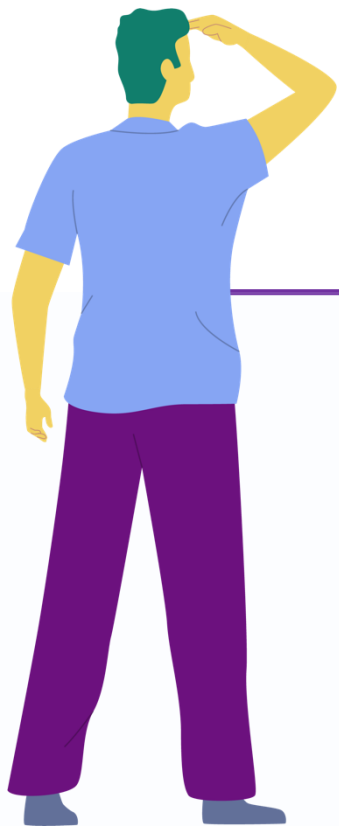E-Resources

Significant Overlap?

List of Titles

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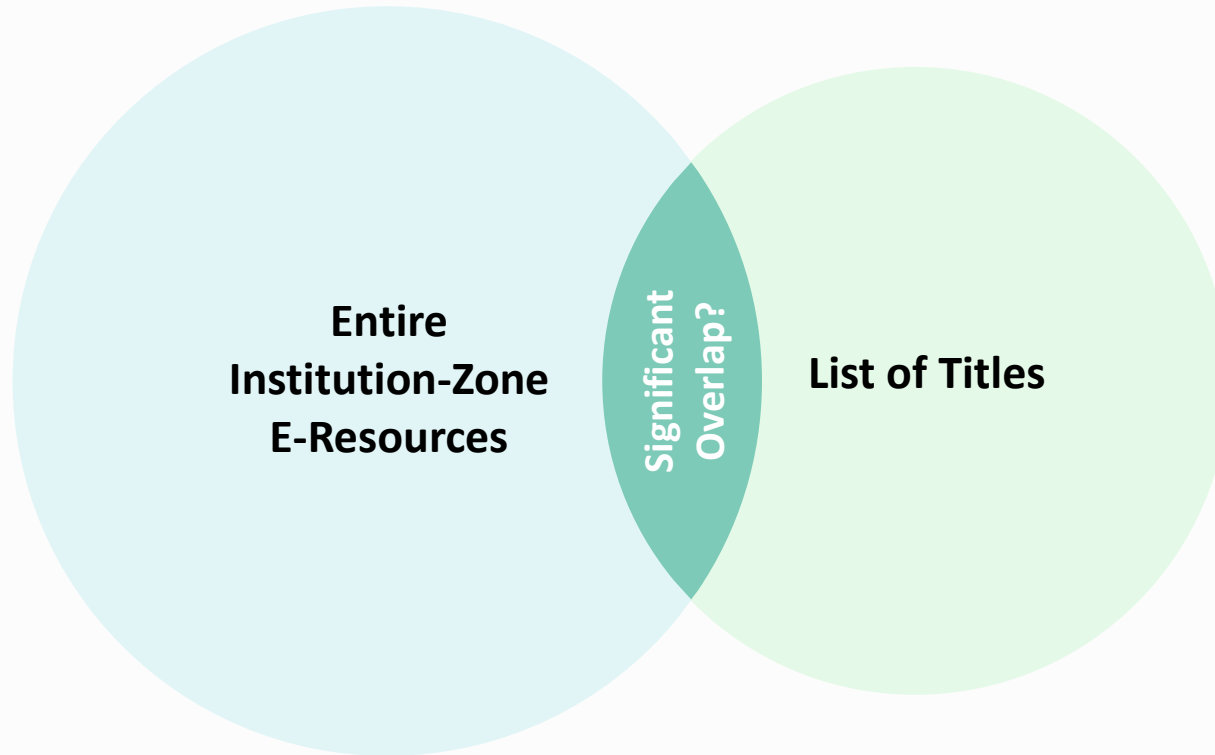
Future Plans

Future Plans

To add the ability to load a list of physical inventory identifiers and compare it with electronic resources (Books, Journals) and/or with existing IZ physical inventory

To add "Has Physical?" indication column in existing E-comparison reports

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5 Key Takeaways

5 Key Takeaways

The Alma Overlap Analysis Tool:

Is effective, fast and easy to use

Is an internal Alma tool – simplifies the analysis generation

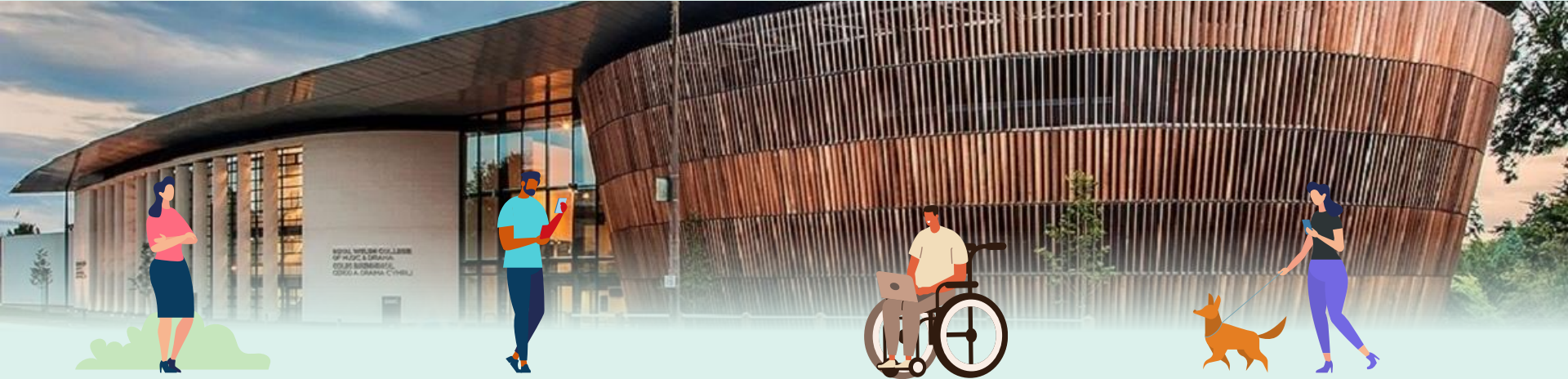Assists with efficient budget usage

Supports all the common use-cases analysis

Upgrades the Library's E-Inventory Management Capabilities

Save time

Smart decisions

Cost Saving

Thank you!

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