

The New and Improved Alma Overlap Analysis Tool

Kevin Lane-Cummings

Beth Campbell

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Knowledge Days

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Welcome and Introduction

Kevin Lane-Cummings

- Senior Customer Education Trainer, Global Education
- Seattle, USA
- SerSol / PQ / ExL / CLVT for 14 years

Beth Campbell

- Alma Tech Support Analyst
- Chicago, USA
- ExL / CLVT for 2 years; 13 years as a cataloger



Agenda



- **Purpose and Use-Cases**
- Considering Subscribing to a Package
- Considering Canceling a Subscription
- Vendor-Provided Title List
- Compare Physical Resources – NEW!
- Further Education

Purpose of Overlap Analysis

Enhance Collection Development

- Determine value of potential new e-resource collections (packages)
- Determine loss of titles (or coverage) if cancelling a current subscription



Use Cases

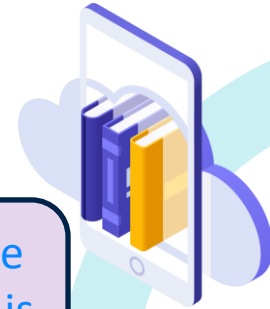
1. Considering subscribing to a new package
2. Considering canceling a subscription to a package
3. Vendor provides a title list; should you buy them, or do you already have them?



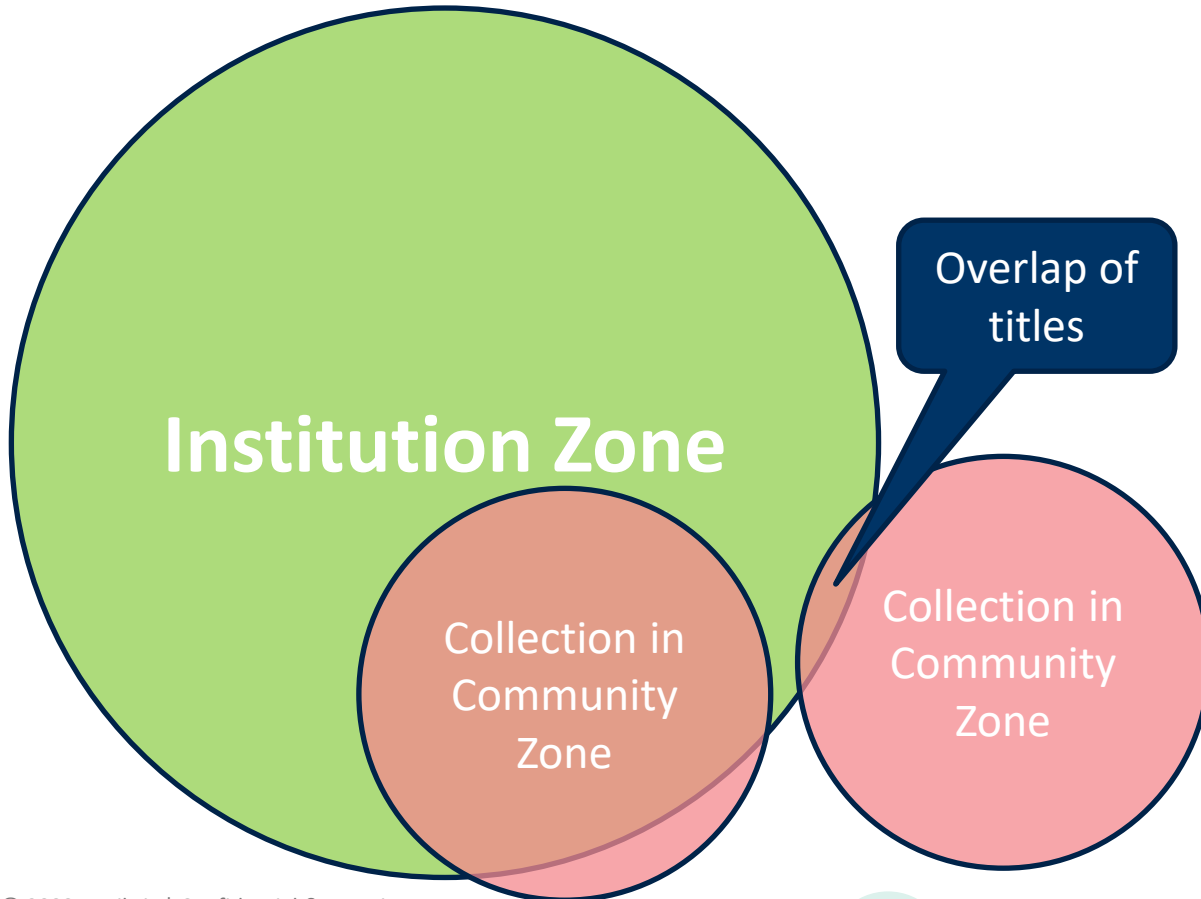
Use Case 1: Considering Subscribing to a Package

- Don't want to subscribe to titles/holdings to which you already subscribe
- Overlap Analysis can tell you! *
 - Compare a CZ collection to all of IZ
- Significant overlap → don't recommend purchase
- Negligible overlap → recommend purchase

* As long as the new collection is in the CZ

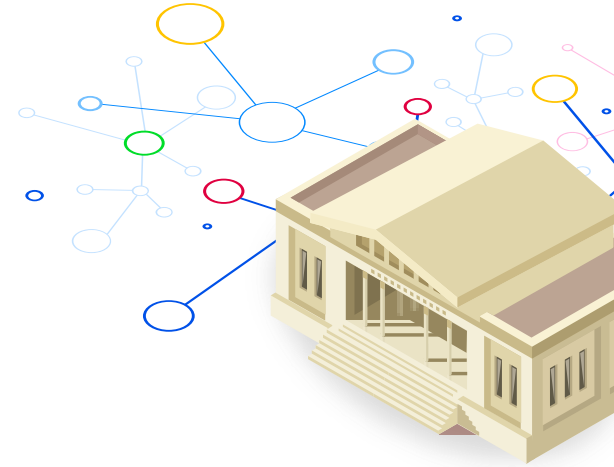


Use Case 1: Considering Subscribing to a Package (cont.)

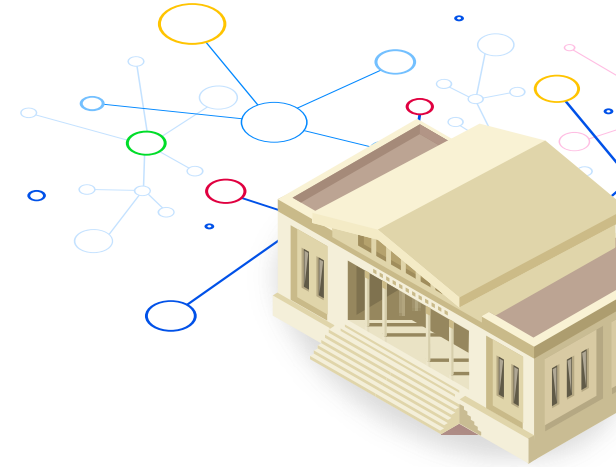
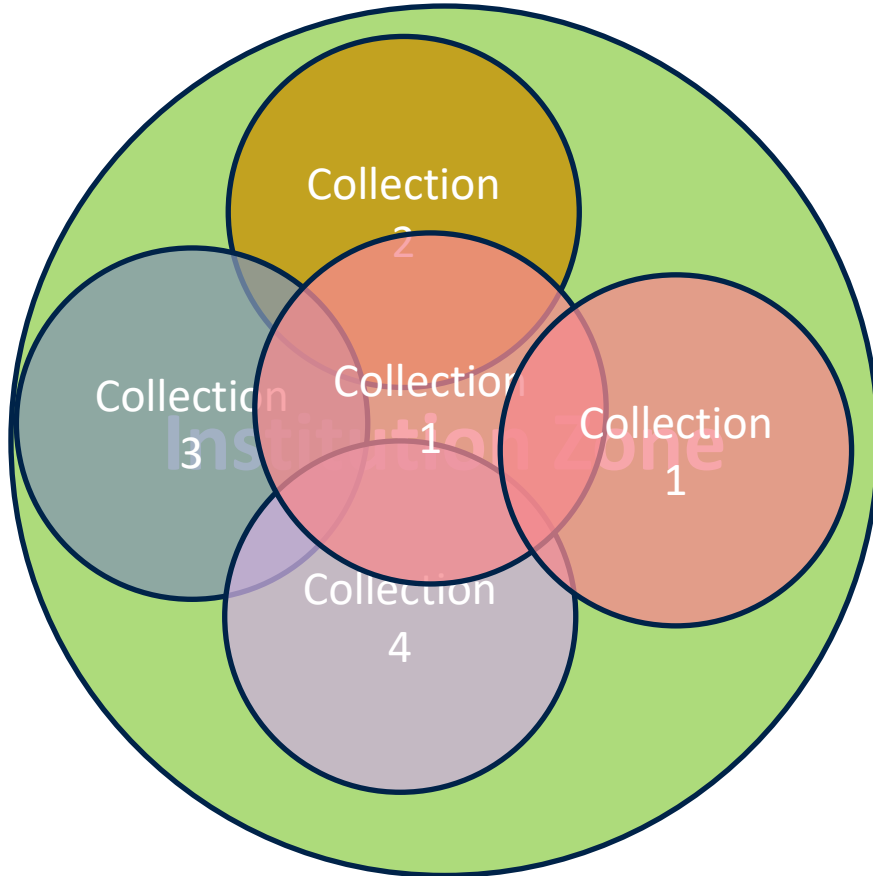


Use Case 2: Considering Canceling a Subscription

- What if there are many titles/ holdings that are unique?
 - Compare an IZ collection to all of IZ
- Significant overlap → unsubscribe
- Negligible overlap → keep the collection



Use Case 2: Considering Canceling a Subscription (cont.)



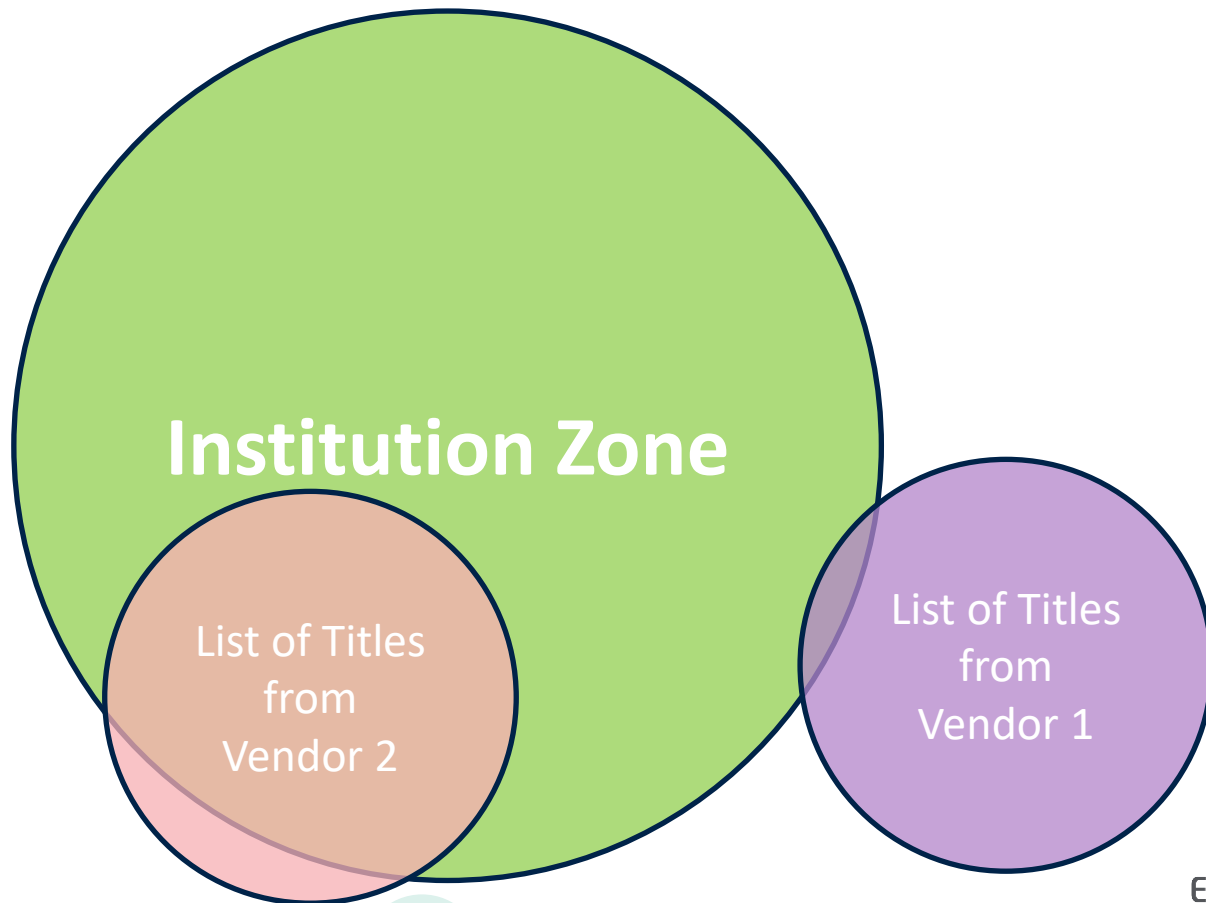
Use Case 3: Vendor-Provided Title List



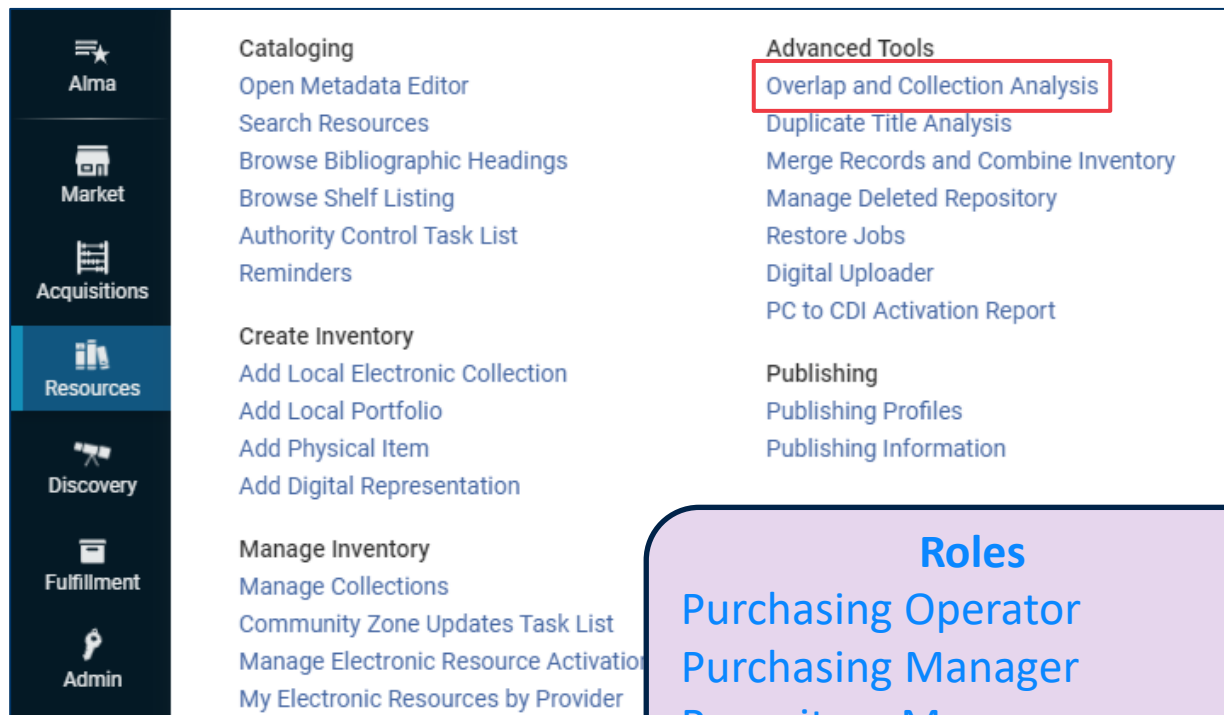
- You are considering subscribing to some titles (for example, part of a selective package)
- Vendor sends (or you acquire) a list of titles
- Significant overlap → don't recommend purchase
- Negligible overlap → recommend purchase

Collection
(of those titles)
doesn't have to
be in CZ!

Use Case 3: Vendor-Provided Title List (cont.)



Access the Overlap Analysis Tool



The screenshot shows the Alma interface with a dark navigation sidebar on the left and a main content area. The sidebar contains icons and labels for Alma, Market, Acquisitions, Resources (highlighted in blue), Discovery, Fulfillment, and Admin. The main content area is organized into sections: Cataloging, Create Inventory, Manage Inventory, Advanced Tools, and Publishing. The 'Overlap and Collection Analysis' tool is highlighted with a red box in the Advanced Tools section.

Section	Item
Cataloging	Open Metadata Editor
	Search Resources
	Browse Bibliographic Headings
	Browse Shelf Listing
	Authority Control Task List
Create Inventory	Reminders
	Add Local Electronic Collection
	Add Local Portfolio
	Add Physical Item
Manage Inventory	Add Digital Representation
	Manage Collections
	Community Zone Updates Task List
Advanced Tools	Overlap and Collection Analysis
	Duplicate Title Analysis
	Merge Records and Combine Inventory
	Manage Deleted Repository
Publishing	Restore Jobs
	Digital Uploader
	PC to CDI Activation Report

Roles
Purchasing Operator
Purchasing Manager
Repository Manager
Electronic Inventory Operator



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Documentation and Further Training

- [Managing Electronic Resources](#)
- [Alma Resources LibGuide \(see Electronic Resource Management\)](#)
- [Working with Overlap and Collection Analysis](#)



Exercises

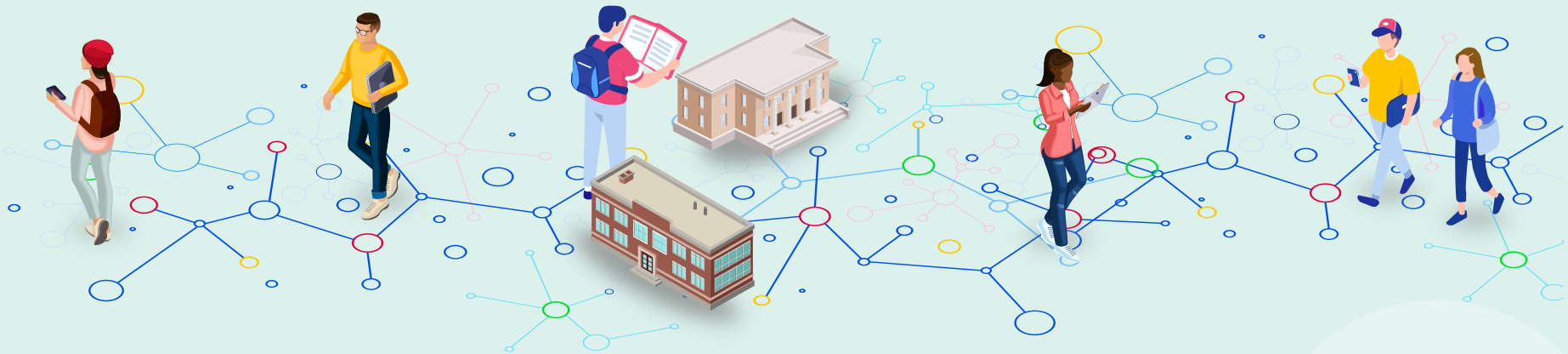
Try these overlap analyses yourself!

Go to:

Ex Libris Knowledge Center > 2023 Knowledge Days

Find this session and download the Exercise file





Question Time

Thank you!



<https://forms.office.com/r/4VWz4HKwDz>

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