Managing Electronic Resources

ERM-203
Overlap Analysis

Alma

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Customer Education Team

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Managing Electronic Resources Series

ERM	Session	Date
101	Overview and Background	Sep 20
102	Order and Activate Collections	Sep 27
103	Order and Activate Portfolios	Oct 4
201	Maintain E-Resources	Oct 11
202	Troubleshoot Discovery	Oct 18
203	**Overlap Analysis**	**Oct 25**
301	Usage Statistics, COUNTER, and SUSHI Harvesting	Nov 1
302	Analytics of E-Resources	Nov 8
B-1	Contribute to the Community Zone	Nov 15
B-2	Upload Electronic Holdings for E-Book Central …	Nov 29

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Agenda

- **Review Exercises**
- Purpose and Use-Cases
- Considering Subscribing to a Package
- Considering Canceling a Subscription
- Vendor-Provided Title List
- Resources (including exercises)

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Review Exercises

Troubleshoot real-world discovery linking issues

- Successful troubleshooting

- Unexpected issues

- Other tactics for troubleshooting

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Purpose of Overlap Analysis

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

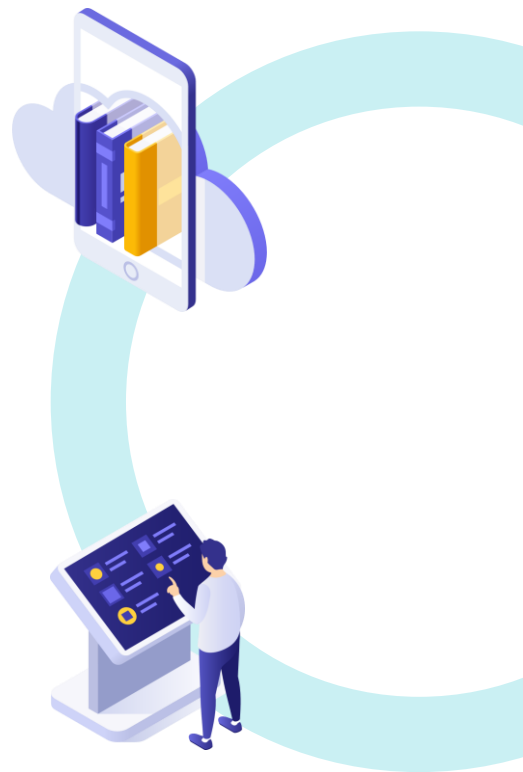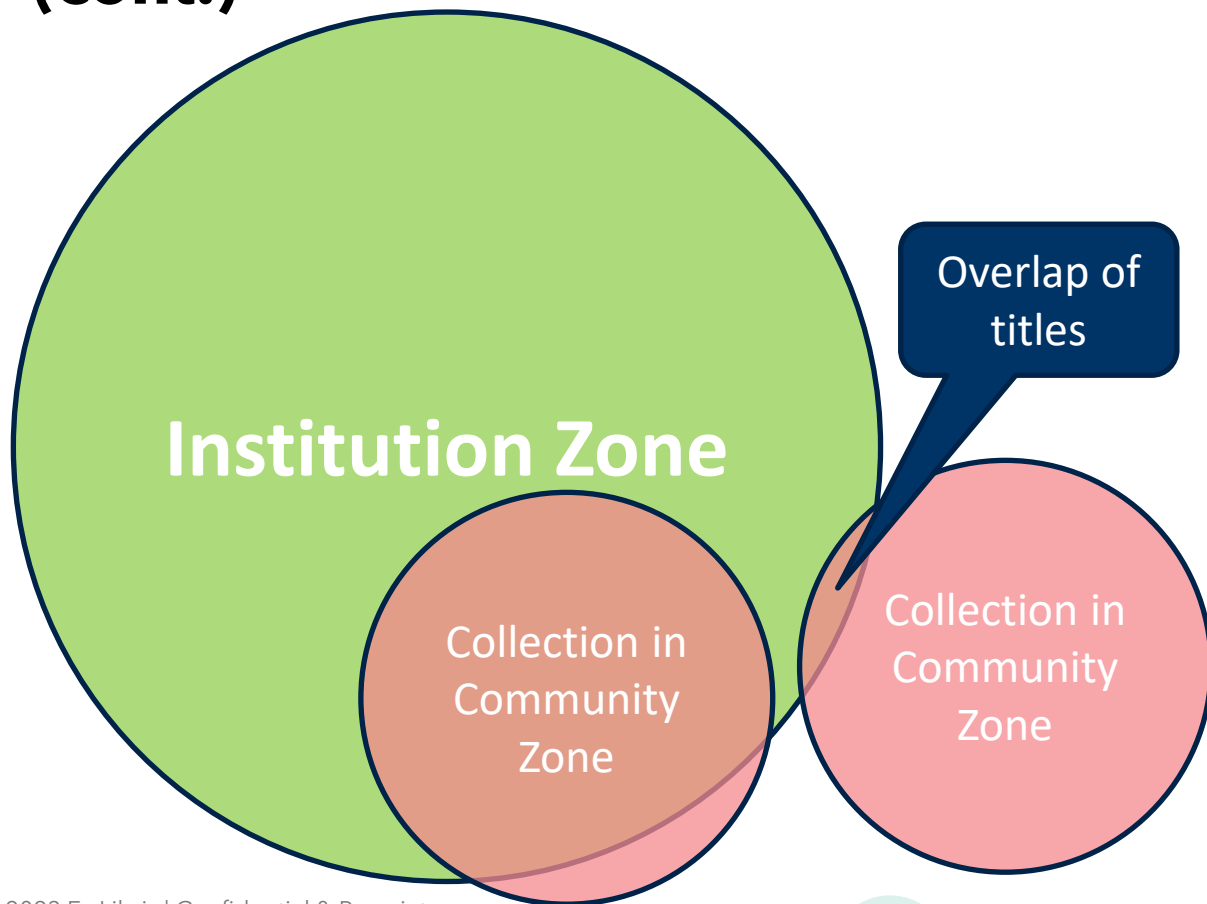3. Vendor provides a title list; should you buy them, or do you already have them?

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

> * As long as the new collection is in the CZ

- Significant overlap ➜ don't recommend purchase
- Little overlap ➜ recommend purchase

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

Institution Zone

Collection in Community Zone

Collection in Community Zone

Overlap of titles
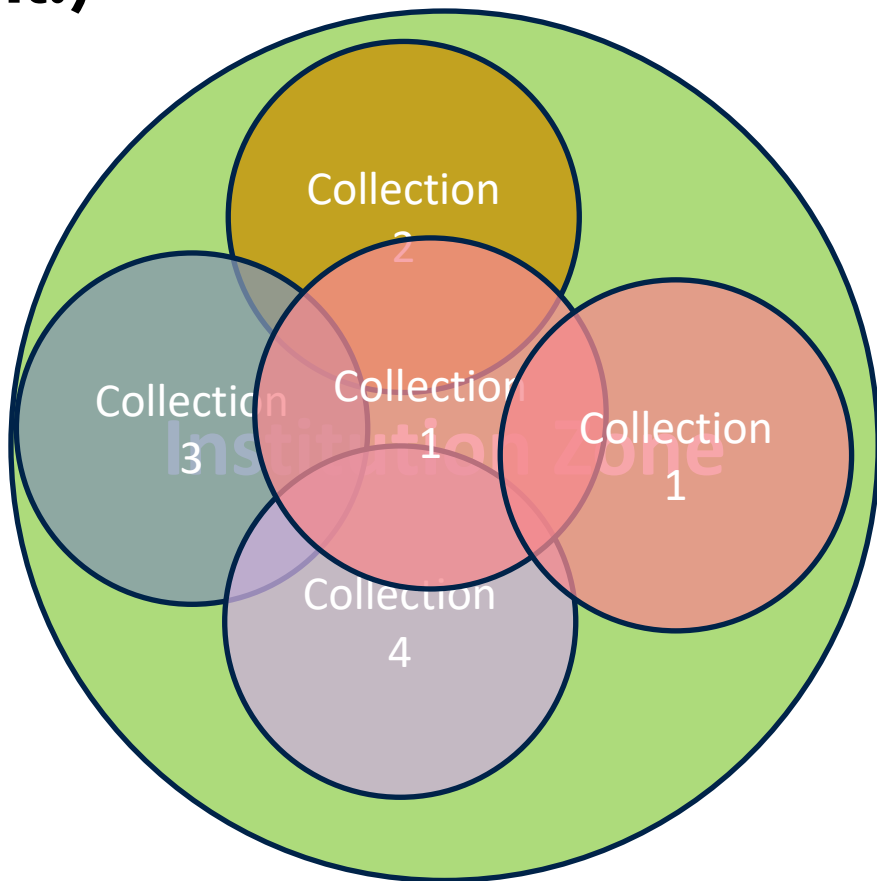
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Use Case 2: Considering Canceling a Subscription

- What if there are many titles/ holdings that are unique?
  - Compare an IZ collection to all of IZ

- Significant overlap ➔ unsubscribe
- Little overlap ➔ keep the collection

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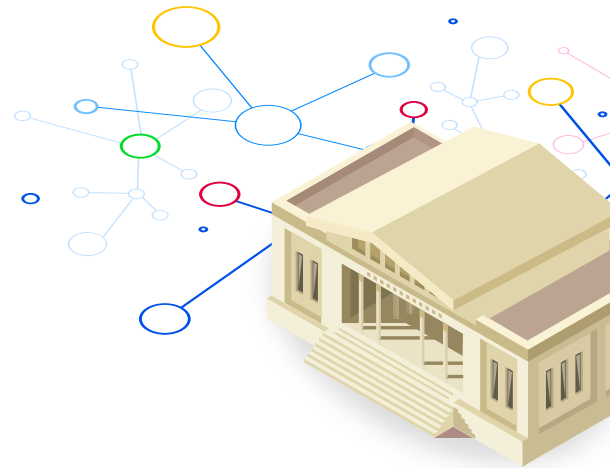
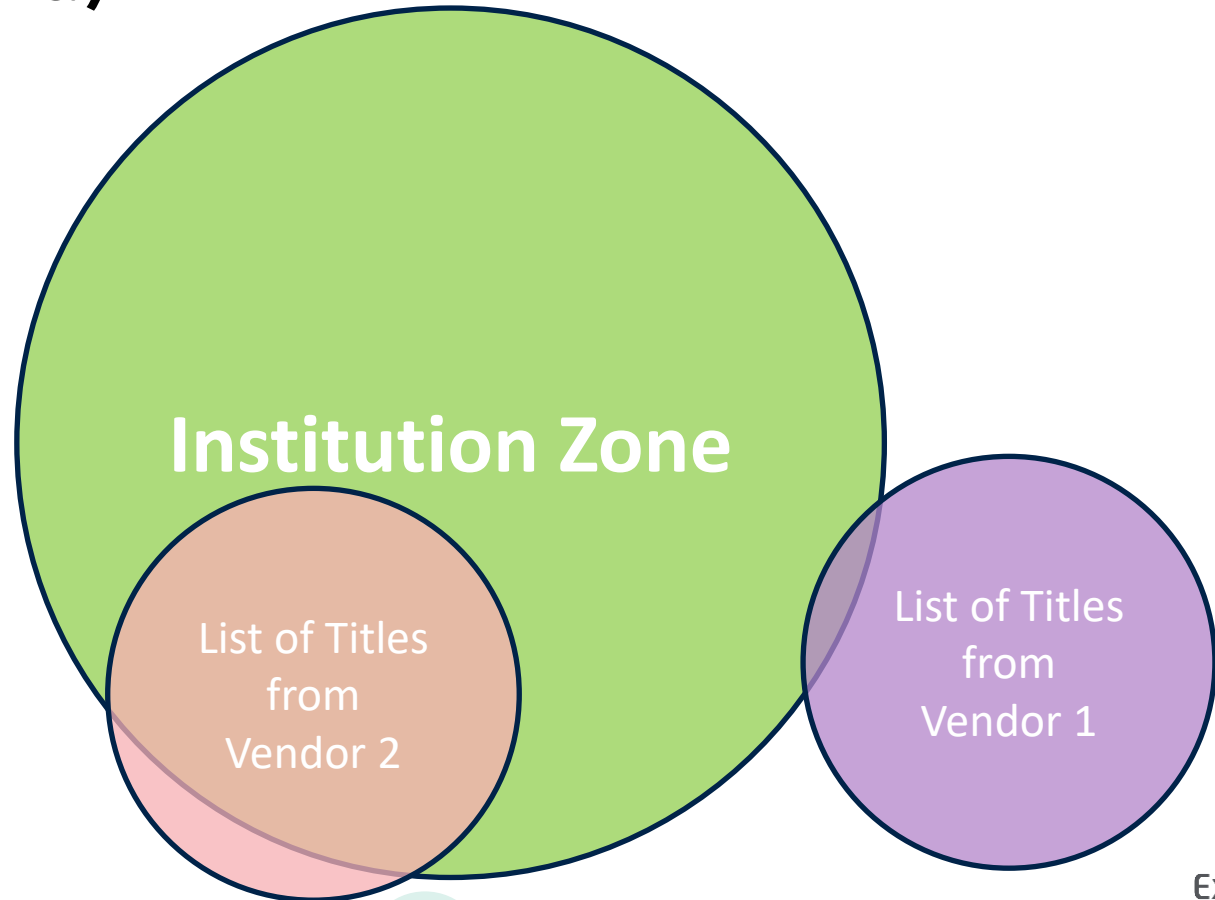# Use Case 2: Considering Canceling a Subscription (cont.)

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
- Little 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

Cataloging
Open Metadata Editor
Search Resources
Browse Bibliographic Headings
Browse Shelf Listing
Authority Control Task List
Reminders

Create Inventory
Add Local Electronic Collection
Add Local Portfolio
Add Physical Item
Add Digital Representation

Manage Inventory
Manage Collections
Community Zone Updates Task List
Manage Electronic Resource Activation
My Electronic Resources by Provider

Advanced Tools
Overlap and Collection Analysis
Duplicate Title Analysis
Merge Records and Combine Inventory
Manage Deleted Repository
Restore Jobs
Digital Uploader
PC to CDI Activation Report

Publishing
Publishing Profiles
Publishing Information

Alma
Market
Acquisitions
Resources
Discovery
Fulfillment
Admin

Roles
Purchasing Operator
Purchasing Manager
Repository Manager
Electronic Inventory Operator

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- **Further Resources**

Documentation and Further Training

- [Managing Electronic Resources](#)

- [Alma Resources LibGuide (see Electronic Resource Management](#)

- [Working with Overlap and Collection Analysis](#)

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Premium Workshops

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<u>**Upcoming Workshops**</u> | <u>**Frequently Asked Questions**</u> | <u>**Contact Us**</u>

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About Today's Session, and Register for Next Week

Ex Libris Knowledge Center > Alma > Training > Webinars > E-Resource Management
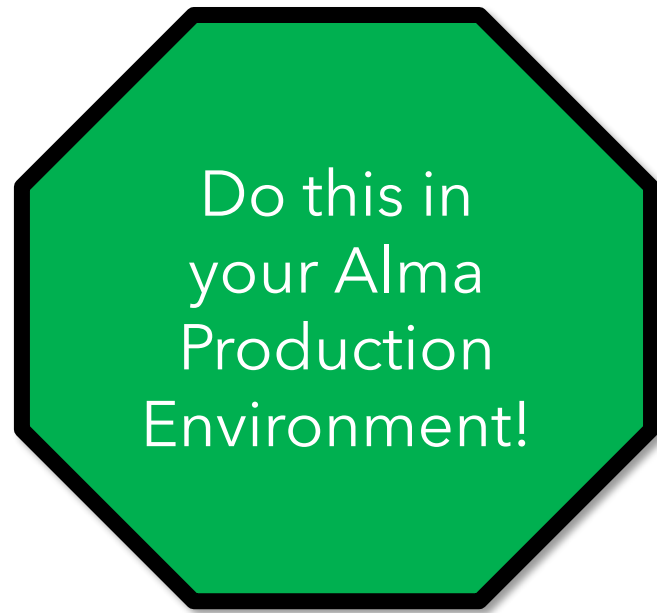
- Download these presentation slides
- Watch recordings of this session (and previous sessions)
- Download practice exercises
- Register for upcoming sessions
    (and see what content they will contain)

Exercises

- Compare a CZ collection to all of IZ
- Compare an IZ collection to all of IZ
- Compare a vendor-supplied title list to all of IZ

Download exercise file for details.

Bring any questions and issues to our next session.

Do this in your Alma Production Environment!

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Managing Electronic Resources

Next Week: Usage Statistics, COUNTER, and SUSHI Harvesting

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Thank you!

Please fill out the survey
that will appear when you
close the WebEx meeting