



# ERM-203 Overlap Analysis

Kevin Lane-Cummings and Jenny Draeger Customer Education Team Alma



#### **Managing Electronic Resources Series**

ERM	Session	Date
101	Overview and Background	Sep 21
102	Order and Activate Collections	Sep 28
103	Order and Activate Portfolios	Oct 05
201	Maintain E-Resources	Oct 12
202	Troubleshoot Discovery	Oct 19
203	Overlap Analysis	Oct 26
301	Usage Statistics, COUNTER, and SUSHI Harvesting	Nov 02
302	Analytics of E-Resources	Nov 09
B-1	Contribute to the Community Zone	Nov 16
B-2	Upload Electronic Holdings for E-Book Central	Nov 30





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



## **Review Exercises**

Troubleshoot real-world discovery linking issues

- Successful troubleshooting
- Unexpected issues
- Other tactics for troubleshooting







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



## **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**

- 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

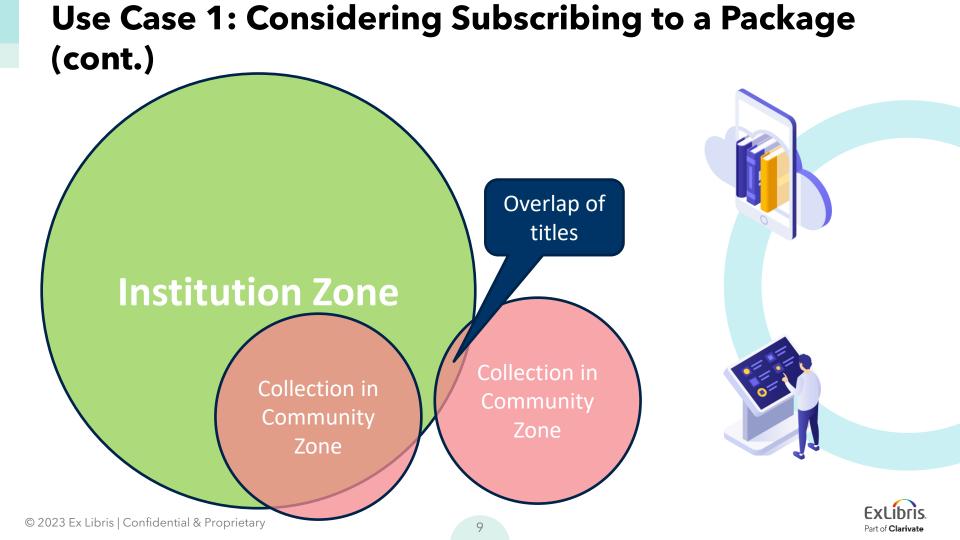
- Don't want to subscribe to titles/holdings to which you already subscribe
- Overlap Analysis can tell you! \*
  - Compare a CZ collection to all of IZ

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



\* As long as the new collection

is in the CZ



## **Use Case 2: Considering Canceling a Subscription**

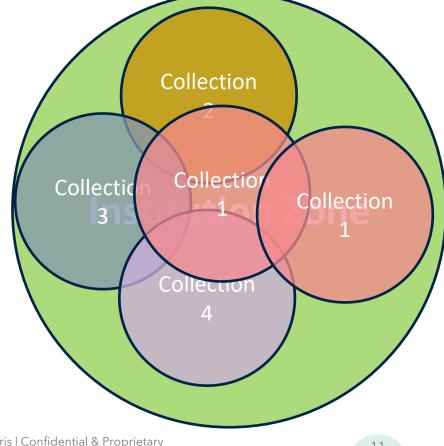
- What if there are many titles/ holdings that are unique?
  - Compare an IZ collection to all of IZ

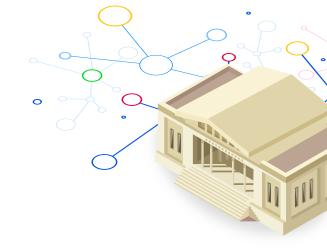
- Significant overlap  $\rightarrow$  unsubscribe
- Little overlap  $\rightarrow$  keep the collection







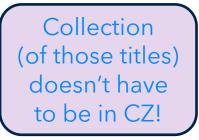




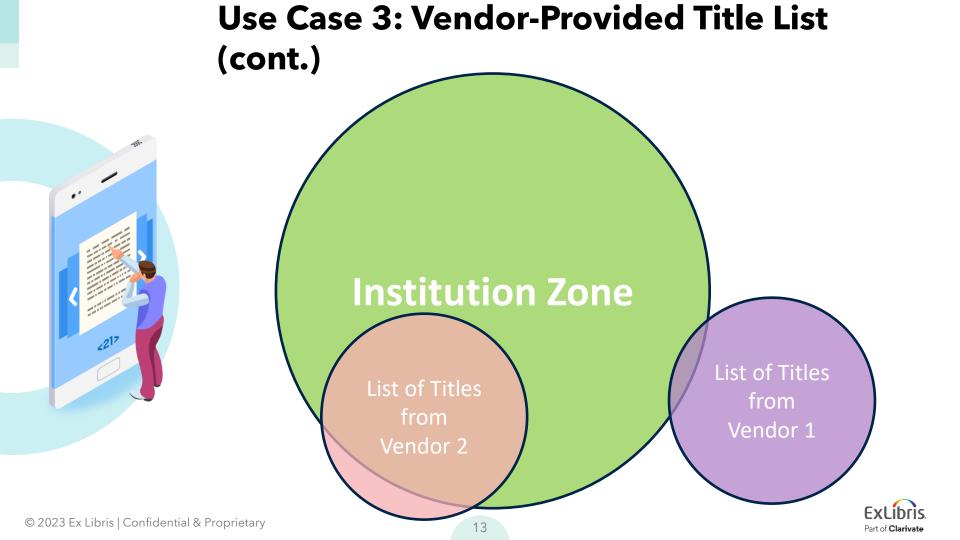


## **Use Case 3: Vendor-Provided Title List**

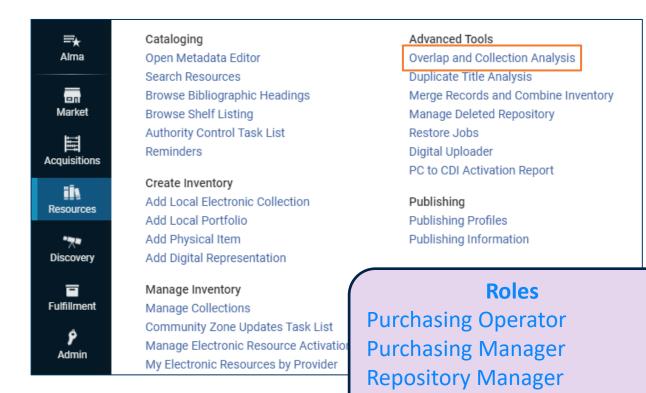
- You are considering subscribing to some titles (for example, part of a selective package)
- Vendor sends (or you acquire) a list of titles
- Significant overlap → don't recommend purchase
- Little overlap → recommend purchase







## **Access the Overlap Analysis Tool**







**Electronic Inventory Operator** 



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





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





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





- Review Exercises
- Purpose and Use Cases
- Considering Subscribing to a Package
- Considering Canceling a Subscription
- Vendor-Provided Title List
- Further Resources



## **Documentation and Further Training**

- <u>Managing Electronic Resources</u>
- <u>Alma Resources LibGuide (see Electronic</u> <u>Resource Management</u>
- <u>Working with Overlap and Collection</u>
  <u>Analysis</u>





Upcoming Workshops | Frequently Asked Questions | Contact Us



## About Today's Session, and Register for Next Week

Ex Libris Knowledge Center > Alma > Training > Webinars > E-Resource Management



- 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!





# Next Week: Usage Statistics, COUNTER, and SUSHI Harvesting



# Thank you!

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

