ERM-203
Overlap Analysis

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Customer Education Team
## Managing Electronic Resources Series

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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)
Review Exercises

Troubleshoot real-world discovery linking issues

• Successful troubleshooting
• Unexpected issues
• Other tactics for troubleshooting
Agenda

• 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

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

Institution Zone

Collection in Community Zone

Collection in Community Zone

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

Collection 1

Collection 2

Collection 3

Collection 4
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.)

Institution Zone

List of Titles from Vendor 1

List of Titles from Vendor 2
Access the Overlap Analysis Tool

**Roles**

- Purchasing Operator
- Purchasing Manager
- Repository Manager
- Electronic Inventory Operator

**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

**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
Agenda

• Review Exercises
• Purpose and Use Cases

• **Considering Subscribing to a Package**
• Considering Canceling a Subscription
• Vendor-Provided Title List
• Resources (including exercises)
Agenda

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

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

- 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

• Managing Electronic Resources
• Alma Resources LibGuide (see Electronic Resource Management)
• Working with Overlap and Collection Analysis
Premium Workshops

- Work directly with product experts
- Convenient
- Interactive
- Share and collaborate

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

- 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.
Next Week: Usage Statistics, COUNTER, and SUSHI Harvesting