




# ERM-203: Overlap Analysis

## Exercises for Attendees

Note: These exercises do *not* need to be practiced in your sandbox; you can use your production environment.

### Exercise 1: Compare a CZ Collection to All of IZ

This exercise explores Use Case 1: Considering subscribing to a package

1. In Alma, open Resources menu and select **Overlap and Collection Analysis**
2. Select **New Analysis**
  - a. Choose Compare Collections
3. Change report title to whatever you want. For example: Use Case 1.
4. Enter a **Description**. For example, "Compare potential new collection from Elsevier with all of IZ."
5. Select **Choose the collection (source) for which you want to evaluate overlap**
6. Search for an electronic collection in the **Community Zone** to which you do *not* subscribe.
7. Click **Select**
8. Select **Compare with collections from ... Entire Institution Zone**
9. Select Match Method **as needed**
10. Select check box to **Include date coverage** if needed (for example, for a serials collection)
11. Choose Reference Year for embargo dropdown **as needed**.
12. At the top, click **Generate**
13. Wait for the report to complete.
14. Click **View Report**
15. Click the download button  for any title lists you want to see in more detail.
16. Open the downloaded file in Excel or the spreadsheet program of your choice.
  - a. Scroll through the file to see information about the titles, including the Collection each title is in.
  - b. Select the second tab, **Analysis Information**, to see information about the Overlap Analysis job.

## Exercise 2: Compare an IZ Collection to All of IZ

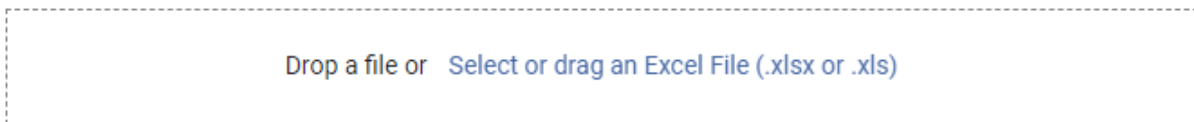
This exercise explores Use Case 2: Considering unsubscribing (cancelling) a package.

1. In Alma, open Resources menu and select **Overlap and Collection Analysis**
2. Select **New Analysis**
3. Choose **Compare Collections**
4. Change report title as desired. For example, "Use Case 2."
5. Enter a **Description** as desired. For example, "Analysis to consider cancelling [name of collection]."
6. Select **Choose the collection (source) for which you want to evaluate overlap**
7. Search the **Institution Zone** for the collection you're considering cancelling
8. Click **Select**
9. Select **Compare with collections from Entire Institution Zone**
10. Select Match Method **as appropriate** for the resources in the collection
11. Select check box for **Include date coverage** if needed (for example, for a serials collection)
12. Click **Generate**
13. Wait for the report to complete.
14. Click **View Report**
15. Download any title files that you'd like to review.

## Exercise 3: Compare a List of Titles to All of IZ

This exercise explores Use Case 3: Considering purchasing a set of titles from a vendor, based on the vendor's title list.

1. In Excel or another spreadsheet program, open the file of titles received from the vendor.
2. The file must follow parameters shown in [this document in the Ex Libris Knowledge Center](#):
  - a. The cell in the first row and first column of the spreadsheet (Cell A1) must contain the title identifier that is used in the table. It must be one of the following types of identifiers:
    - i. eISSN/ISSN
    - ii. eISBN/ISBN
    - iii. LCCN
    - iv. Title
  - b. The identifier for each title must appear in the remaining rows of the first column of the spreadsheet.
  - c. Other columns of data can be included (for example, Title, Coverage, etc.) and will appear in the results files if the column also has text in the header (Row 1).
  - d. Each row of the spreadsheet should contain only one title.
3. In Alma, open Resources menu and select **Overlap and Collection Analysis**
4. Select **New Analysis**
5. Choose **Look Up Titles**
6. Change report title of your choice. For example: "Use Case 3"
7. Enter **Description** of your choice. For example: "Compare vendor title list to all of IZ"
8. Drag and drop the vendor's title file from your computer onto the page in the **Upload input file** section:



9. Select box for **Institution Zone electronic resources**
10. Choose **report format output** as desired. For example, "One excel line per match"
11. Click **Generate**
12. Wait for the report to be completed.
13. Click **View Report**
14. Download and review any title files that you'd like to see.

Congratulations, you have completed the exercises for this session!