



Managing
Electronic
Resources

ERM-203 Overlap Analysis

Ex Libris Customer Education

April 2025

Managing Electronic Resources Series

ERM	Session	Date
101	Overview and Background	Mar 19
102	Order and Activate Collections	Mar 26
103	Order and Activate Portfolios	Apr 2
201	Maintain E-Resources	Apr 9
202	Troubleshoot Discovery	Apr 16
203	Overlap Analysis	Apr 23
301	Usage Statistics, COUNTER, and SUSHI Harvesting	Apr 30
302	Analytics of E-Resources	May 7
B-1	Contribute to the Community Zone	May 14
B-2	Upload Electronic Holdings Automatically	May 21

Agenda

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

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

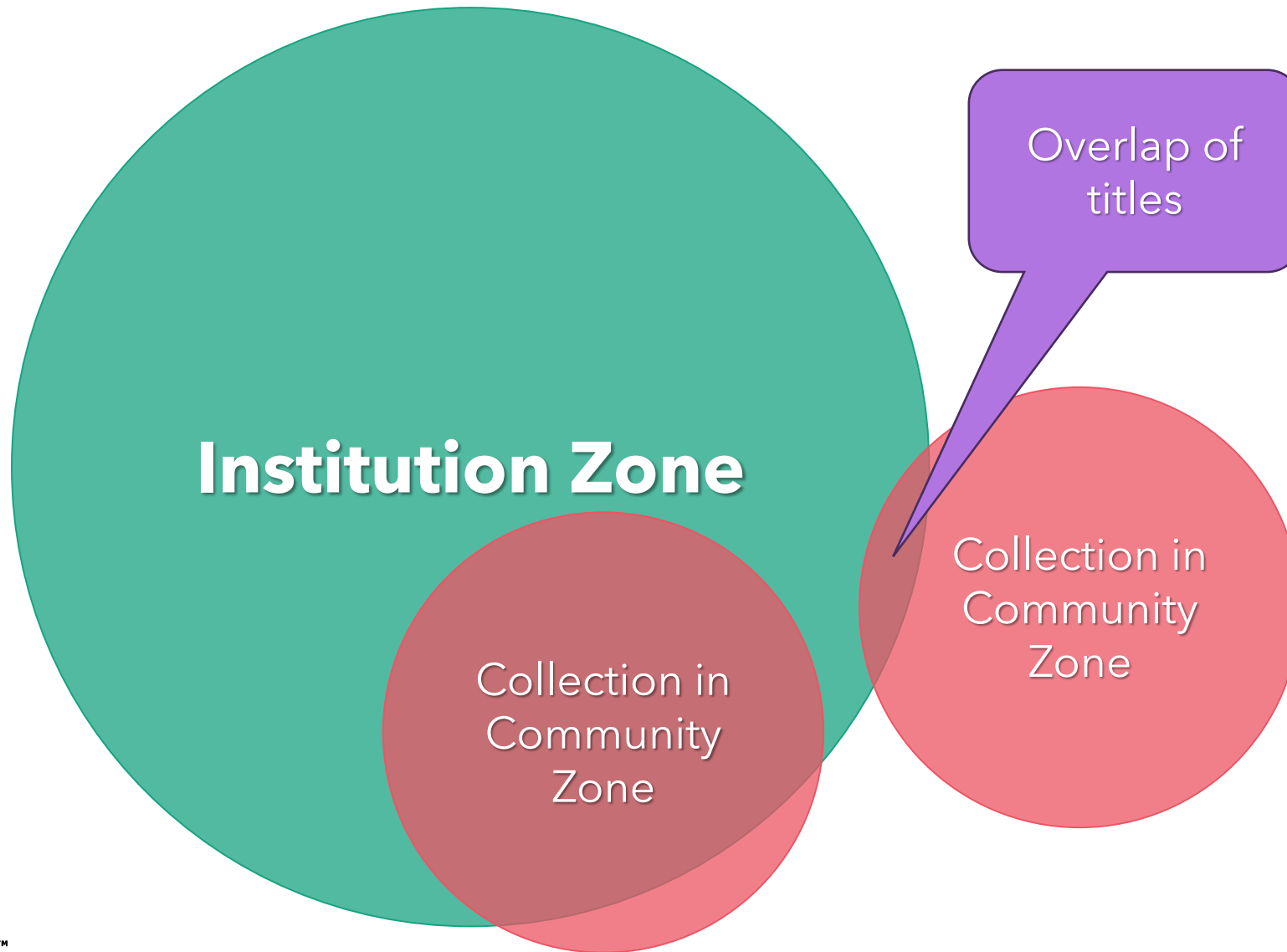
Note: Does not work on database-type collections

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

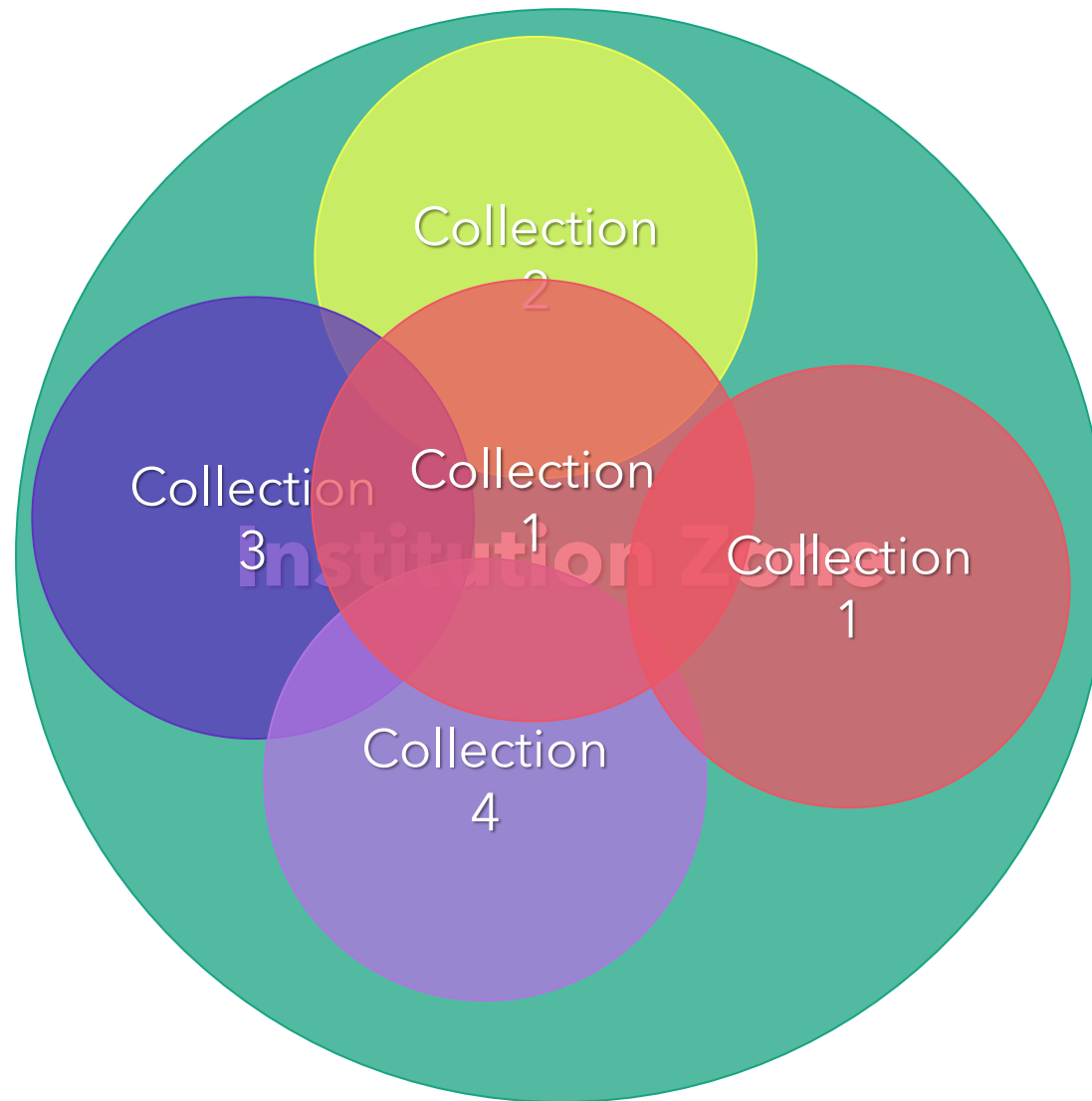
Use Case 1: Considering Subscribing to a Package (cont.)



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
- Little overlap → keep the collection

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



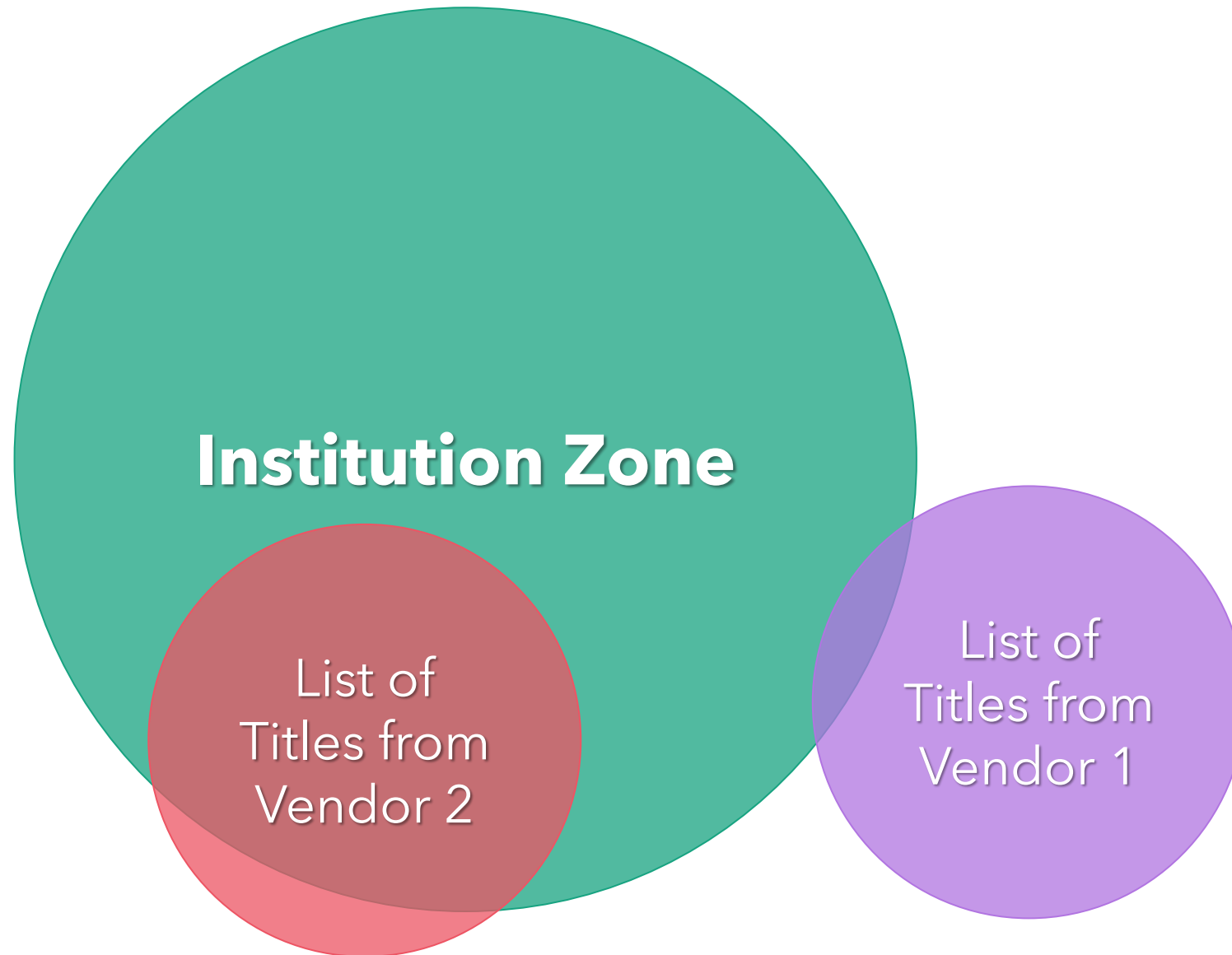
Use Case 3: Vendor-Provided Title List

- 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
- 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

The screenshot displays the Alma interface with a dark sidebar on the left containing navigation icons and labels: Alma, Market, Acquisitions, Resources (highlighted in blue), Discovery, Fulfillment, and Admin. The main content area is divided into three sections: '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), and 'Manage Inventory' (Manage Inventory, Manage Collections, Community Zone Updates Task List, Manage Electronic Resource Activation, My Electronic Resources by Provider). The 'Advanced Tools' section is highlighted with a red border and contains: Overlap and Collection Analysis (highlighted with a red border), Duplicate Title Analysis, Merge Records and Combine Inventory, Manage Deleted Repository, Restore Jobs, Digital Uploader, and PC to CDI Activation Report. The 'Publishing' section contains Publishing Profiles and Publishing Information.

Roles

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

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Documentation and Training

- Managing Electronic Resources
- Working with Overlap and Collection Analysis

About Today's Session, and Register for Next Week

Ex Libris Knowledge Center > Alma > Training > Webinars > Managing Electronic Resources

- Download these presentation slides
- Watch recordings of this session (and previous sessions)
- Download practice exercises
- Review Q&As
- Register for upcoming sessions (and see what content they will contain)

Managing Electronic Resources

Managing Electronic Resources is a course of ten 60-minute sessions regarding many aspects of managing electronic resources in your institution's Alma service.

The course is structured as follows:

- Sessions ERM-101, -102, and -103: A general overview, and basic training in ordering and activating e-resources. Good for library staff who have used Alma before but not for e-resources.
- Sessions ERM-201, -202, -203: Tools for maintaining e-resources, troubleshooting broken links in your discovery service, and conducting overlap analysis. Pre-requisites are Sessions ERM-101, -102, and -103, or experience ordering and activating electronic collections and portfolios.
- Sessions ERM-301 and -302: Advanced tools to track usage statistics, COUNTER data, SUSHI harvesting, and Alma's Analytics tool. Assumes an understanding of all workflows in the ERM-100-level and ERM-200-level sessions (above), as well as familiarity with Alma's Design Analytics tool.
- ERM Bonus 1 and 2: Specialized tools for contributing records to the Community Zone, and uploading holdings for a specific collection: Ebook Central Perpetual, DDA and Subscription Titles. Assumes an understanding of all workflows in the 100-level sessions (above).

Links to register for all sessions in the series:

- [APAC](#)
- [AMERICAS](#)
- [EMEA](#)

Session Number	Session Name	Content Outline	Additional Resources	Registration APAC	Registration EMEA	Registration Americas
ERM-101	Overview and Background	<ul style="list-style-type: none">• Alma's inventory model and terminology for e-resources• Types of electronic portfolios• User roles for managing e-resources	<ul style="list-style-type: none">• Prerequisites: Experience using Alma for physical resources, or already watched Getting to Know Alma and Alma Essentials• Presentation visuals (slides)• Questions and answers from the live trainings session• More documentation and training resources:<ul style="list-style-type: none">• Managing Electronic Resources - documentation home page• Alma LibGuide - Resources tab• Getting to Know Alma (video training)• Alma Essentials (video training)		19 March 2025	View Recording
ERM-102	Order and Activate Collections	<ul style="list-style-type: none">• General ordering and activation workflow• Order subscription collection	<ul style="list-style-type: none">• Prerequisites: Overview and Background (session ERM-101 above)• Presentation visuals (slides)		26 March 2025	View Recording

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

- Background on usage statistics
- Upload COUNTER reports
- Set up SUSHI harvesting





Thank You!

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

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