



# ERM-301: Usage Statistics, COUNTER, and SUSHI Harvesting

## Exercises for Attendees

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

### Exercise 1: Retrieve COUNTER Reports from a Vendor

Working with one of your vendors that is an access provider of e-resources at your institution, retrieve a COUNTER report of usage statistics.

The process will be different for different vendors. Some will send reports (for example, via email) on a regular basis automatically. Some will require you to log in to their administration portal (or whatever they call it) to download the reports.

After you get the COUNTER report from the vendor, proceed to Exercise 2 below.

## Exercise 2: Upload COUNTER Report into Alma

1. On the Acquisitions menu, select Vendors.
2. Find the vendor from whom you received the COUNTER report and select row-action Edit.
  - a. If that vendor doesn't exist in your Alma, you'll need to [create the vendor](#).
3. Switch to the Usage Data tab
4. In the lower section (Uploaded Filed), select Upload File
5. Click: Select a file
6. Navigate to JSTOR COUNTER DB1a.xlsx
7. In the Select a file section, navigate to the COUNTER report on your computer and open it.
8. In the Subscriber dropdown menu, ensure the correct subscriber is set.
  - a. For almost all institutions, there will be only one Subscriber. But if there is more than one here, and you don't know which one to select, contact your Acquisitions team for further information.
9. Click Upload File.
10. The new COUNTER usage-report file will be loaded into Alma, in the Uploaded Files section.
  - a. You can read information about the file by using row-action View Report
  - b. You can look at the file by using row-action Download (although the file will look the same as the one you uploaded).

## Exercise 3: Set Up SUSHI Harvesting

1. Contact one of your vendors that is an access provider of e-resources, to get the information Alma needs for communicating with the vendor's SUSHI server. See [this list of vendors](#) for details.
2. On the Alma Acquisitions menu, select Vendors.
3. Find the vendor for which you want to set up SUSHI harvesting, and select row-action Edit.
  - a. If that vendor doesn't exist in your Alma, you'll need to [create the vendor](#).
4. Switch to the Usage Data tab
5. In the upper section (SUSHI Accounts), ensure there isn't already an account for that vendor, then select Add SUSHI Account.
  - a. Select Release 4 or Release 5, as appropriate for the vendor
  - b. If the vendor provides some COUNTER reports using the Release 4 standard, and other reports using the Release 5 standard, you'll need to create two SUSHI accounts for that vendor, one for each Release standard.
6. In the SUSHI Account field, search for or browse to find the appropriate account.
  - a. If you can find the vendor in the list, the Vendor URL field will automatically populate with the correct URL. Otherwise ...
7. If necessary, in the Override URL field, add the appropriate URL for accessing the vendor's SUSHI server.
8. In the Request Details section, add the appropriate access information that is unique to your institution, such as IDs, UN/PW, etc.
9. At the top of the page, click Test Connection
  - a. Alma will quickly contact the vendor's SUSHI server and download the server's response as a JSON file
  - b. Open the JSON file (with a JSON compatible application, or even just a text editor).
  - c. In the file, look for words similar to "connection successful." If you don't see anything like that, then go back to the Request Details section to ensure you've used the correct access information from the vendor.
10. If you are setting up a Release 4 SUSHI account, you'll need to pick the Report Type here in the Request Details section. You'll also need to make a different account for each Report Type you want from this vendor.
11. If you are setting up a Release 5 SUSHI account, continue down the page to the Usage Report Types section and add all the Report Types that this vendor provides in Release 5 format.
12. Click Save
13. Click Confirm
  - a. Alma will connect with the vendor's SUSHI server again, this time to make sure those report types are available. Alma will again display the response from the vendor, and you will need to remove any Report Types that the vendor doesn't provide.
14. Back on the Vendor Details page, on the row of the SUSHI Account you just created, you can select row-action Harvest Now. Alma will retrieve the past 12 months of usage data from the vendor.

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To make sure the SUSHI harvesting will happen automatically from now on:

15. Open Alma Configuration
16. On the Acquisitions Menu, select Acquisition Jobs Configuration
17. In the SUSHI harvesting job section:
  - a. Ensure the Status is Active
  - b. Set the schedule as desired (once a month is enough, because vendors create COUNTER reports once a month)
  - c. Set up email notifications, which will send a report whenever this Job completes.

Congratulations, you have completed the exercises for this session!