



## Managing COUNTER-Compliant Usage Data

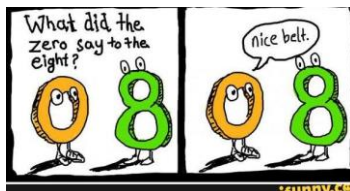
Harvesting, uploading, reporting

Vlad Buldryev | Senior Support Analyst  
Yaala Ariel-Joel | Support Analyst

**ExLibris**  
a ProQuest Company

### Introductions

- **Vlad Buldryev, Senior Support Analyst**
  - Specializes in link resolution and delivery across Ex Libris products.
  - Holds an MLIS degree from Simmons College.
- **Yaala Ariel-Joel, Support Analyst**
  - At Ex Libris, working with Alma, Aleph, and SFX customers
  - Prior to joining Ex Libris worked as a reference librarian and some other functions in several special libraries.

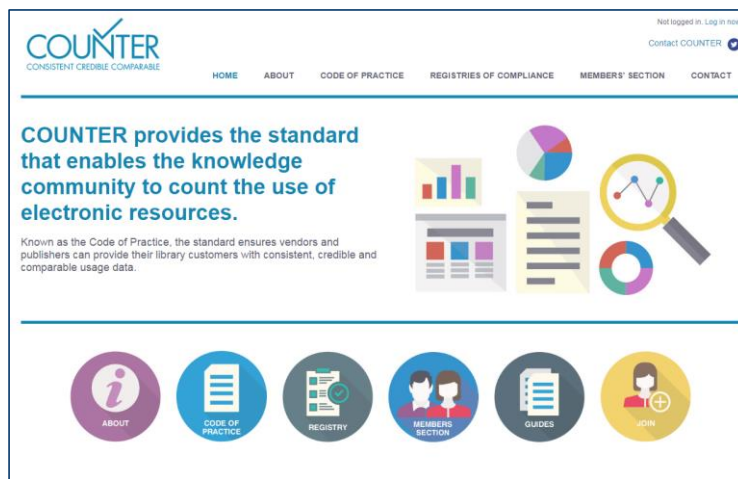


## Objectives and Target Audience

- Brief Session Description: understanding how to manage COUNTER-compliant usage data in Alma
- Session Deliverables:
  - By the end of this sessions you know how to:
    - Set-up SUSHI Vendor in Alma
    - Upload files – manually and via SUSHI
    - Monitor “Load Usage Data”
    - Utilize Analytics Usage and Cost Usage reports
- Session Target Audience:
  - All level customers
  - Systems, Technical and all interested librarians

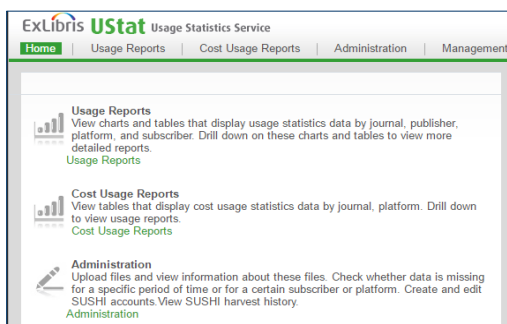
## What is Project Counter?

- Project COUNTER – [www.projectcounter.org](http://www.projectcounter.org)  
(Counting Online Usage of Networked Electronic Resources)



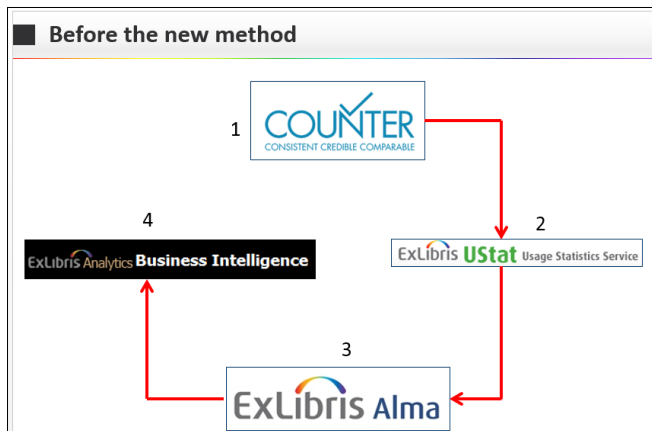


## Transition from UStat to COUNTER data management in Alma



### Before May 2017 Release: COUNTER is managed in UStat

- COUNTER usage data was loaded until now to UStat
- To query via Alma, a weekly job ran to populate data in Alma Analytics



## COUNTER on the Roadmap

- COUNTER featured on the Roadmap

### Managing COUNTER Compliant Usage Data

Customer Value

Acquisitions

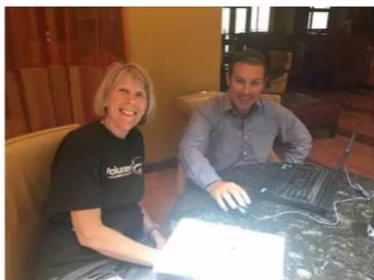
- One location for Managing COUNTER Compliant Usage Data without needing to use Alma with another COUNTER report management tool.
- Support for additional COUNTER report types

#### Feature Highlights

- SUSHI accounts defined in a new "Usage Data" tab of the vendor record
- COUNTER reports can be uploaded both manually and via SUSHI harvesting.
- Daily ETL to analytics

## As of May 2017 Release: COUNTER is managed in Alma

- Today, COUNTER usage data is loaded directly to Alma.
  - Unified management interface, one login.
  - Review results – within a day.
  - More COUNTER Report Types are available now.



Yoel and Laura Guy from Colorado School of Mines review the development plans before the beginning of the ELUNA Conference. May 3, 2016. Oklahoma. USA.

"COUNTER Reports from Ustat to Alma"  
 Laura Guy  
 Thursday, May 11, 11:15-12:00  
 Nirvana A

## Agenda

**1****COUNTER management****2****Roles, Vendor configuration, SUSHI harvesting****3****Manually uploading files****4****Reporting****5****Support Resources and Survey**

## Roles required



## Roles required

The following roles relate to COUNTER compliant user statistics:

- **Acquisitions Administrator** - Configure COUNTER subscribers and activate, deactivate, or manually run the automatic harvesting job.
- **Vendor Manager** - View usage data related to a particular vendor, manually harvest data for the vendor, manually upload data for the vendor, and manage any uploaded data files.
- **Usage Data Operator** - Manually upload data for any vendor, manage the uploaded data files, and view missing COUNTER data. *New role!*
- **General System Administrator** - Activate, deactivate, schedule, or monitor the automatic harvesting job, view the job's history, report, and events, and configure email notifications for the job.

## Roles required

**Usage Data Operator** –  
can manually upload data for any vendor,  
manage the uploaded data files,  
and view missing COUNTER data.

### ACQUISITIONS

#### Purchase Order Lines

Search for PO Line  
Order Without Inventory  
Review  
Claim  
Renew  
Review Deferred  
Manage Trials  
Manage EDI Tasks

#### Purchase Order

Package  
Review  
Approve  
Delete PO

#### Purchase Requests

Create Purchase Request  
Manage Purchase Requests

#### Receiving and Invoicing

Search for Invoice  
Receive  
Create Invoice  
Review  
Approve  
Waiting for Payment

#### Post-Receiving Processing

Receiving Department Items  
Scan In Items

#### Import

Import  
Monitor and View Imports  
Resolve Import Issues  
**Load Usage Data**

#### Acquisitions Infrastructure

## The vendor record



### COUNTER for Publishers & Vendors



## The vendor record – manually load files

- Files can be loaded manually, directly in the Vendor's "Usage Data" tab.

Vendor Details

Vendor name Oxford Reference Vendor code OXFORDREF

Summary Contact Information Contact People EDI Information **Usage Data** Invoices

**SUSHI Accounts**

SUSHI Vendor ☐

**Uploaded Files**

Quick Add

Upload File  Subscriber Integration

Status All Files Subscriber All Upload Date All Uploaded Report Type All

| File Name | Upload Date | Uploading User | Subscriber |
|-----------|-------------|----------------|------------|
|-----------|-------------|----------------|------------|

## The vendor record – manually load files

- Files can be loaded manually, directly in the Vendor's "Usage Data" tab.

**Uploaded Files**

**Quick Add**

Upload File  Subscriber Colorado School of Mines Upload File

Status All Files Subscriber All Upload Date All Uploaded Report Type All

| File Name   | Upload Date          | Uploading User  | Subscriber | Status          | Report Type |
|---|----------------------|-----------------|------------|-----------------|-------------|
| 1 Sushi_JSTOR_PR1_201703_3135...                      | 01 Apr 2017 08:55:03 | Sushi Scheduler |            | Fully processed | PR1         |
| 2 Sushi_JSTOR_JR1_201703_31359...                     | 01 Apr 2017 08:54:37 | Sushi Scheduler |            | Fully processed | JR1         |
| 3 JSTOR DB1_COUNTER_Report_-_26Mar2017_arthurlakes... | 26 Mar 2017 11:14:28 | 10264463        |            | Fully processed | DB1         |
| 4 JSTOR BR2_COUNTER_Report_-_26Mar2017_arthurlakes... | 26 Mar 2017 11:13:32 | 10264463        |            | Fully processed | BR2         |

## The vendor record - SUSHI

- A Vendor can be defined as SUSHI Vendor after clicking the "SUSHI Vendor" checkbox

**support!** **Alma** **Sandbox** Tasks Analytics Currently at: Cataloging and Acquisition

**Vendor Details**

Vendor name ya\_Stein Vendor code YA\_STEIN

Summary Contact Information Contact People EDI Information Usage Data Invoices PO

**SUSHI Accounts**

SUSHI Vendor ☐

**Uploaded Files**

**Quick Add**

Upload File  Subscriber  Upload File

Status All Files Subscriber All Upload Date All Uploaded Report Type All

No records were found.



## What is SUSHI?

- The Standardized Usage Statistics Harvesting Initiative (SUSHI) protocol automates the **MONTHLY** collection and transport of electronic resource usage statistics reports from COUNTER-compliant vendors
- SUSHI protocol was created to replace the time consuming manual collection of COUNTER usage data
- Required in the Release 3 (R3) Code of Practice in 2008
- View the NISO SUSHI Standard/Code of Practice:  
<http://www.niso.org/workrooms/sushi/>

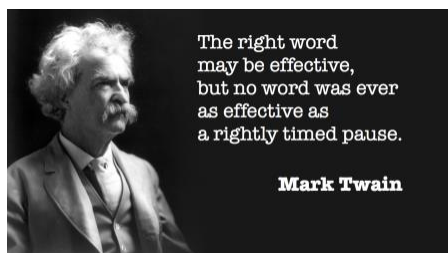


## The vendor record - SUSHI

- Add or edit SUSHI harvesting account from the Vendor's Usage Data tab.
- Your current setup (credentials) can be downloaded from UStat.

| SUSHI Account Details  |   |                 |              |        |
|--|---|-----------------|--------------|--------|
| Vendor name  | AMERICAN CHEMICAL SOCIETY   |                 | Vendor code  | ACS    |
| Account Identifier   | SUSHI Account *American Chemical Society  |                 | Status       | Active |
| Vendor URL   | <a href="http://pubs.acs.org/api/soap/analytics/SushiServ">http://pubs.acs.org/api/soap/analytics/SushiServ</a> |                 | Subscriber * |        |
| <b>Request Details</b>   |   |                 |              |        |
| Requester ID   | AdminACS  | Requester Name  | AdminACS     |        |
| Customer ID  | *****   | Customer Name   | *****        |        |
| User Name  | AdminACS  | Password        | *****        |        |
| Report Type  | JR1   | Counter Release | R4           |        |
| Requester Email  | *****@*****.edu   |                 |              |        |
| <div> <a href="#">Cancel</a> <a href="#">Save</a> <a href="#">Test Connection with Response</a> <a href="#">Test Connection</a> </div> |   |                 |              |        |

## Time for Demo



## Load Usage Data – for any vendor

- It is possible to load files directly to Alma from: ACQUISITIONS  
→ Import → Load Usage Data

Import  
Import  
Monitor and View Imports  
Resolve Import Issues  
Load Usage Data

Usage Data Loader

Uploaded Files Missing Data

Quick Add

Vendor\*  Subscriber\*  Upload File

Status | All Files |  Subscriber |  Upload Date |  All Uploaded |  Report Type |  All |  Vendor |  All |

| File Name   | Vendor | Upload Date          | Uploading User  | Subscriber               | Status  | Report Type |
|---|--------|----------------------|-----------------|--------------------------|---------|-------------|
| 1 Sushi_American Mathematical Society_DB1_201703_316... | -      | 08 Apr 2017 10:39:27 | Sushi Scheduler | Colorado School of Mines | Invalid | -           |

## Load Usage Data – for any vendor

- Filters and Action options exist:

The screenshot shows the 'Usage Data Loader' interface. At the top, there are tabs for 'Uploaded Files' and 'Missing Data'. Below these is a 'Quick Add' section with fields for 'Vendor\*' (a dropdown menu), 'Subscriber\*' (a dropdown menu showing 'Colorado School of Mines'), and 'Upload File' (a text input). Below the 'Quick Add' section is a filter bar with dropdowns for 'Status' (set to 'All Files'), 'Subscriber' (set to 'All'), 'Upload Date' (set to 'All Uploaded'), 'Report Type' (set to 'All'), and 'Vendor' (set to 'All'). Below the filter bar is a table with columns: 'File Name', 'Vendor', 'Upload Date', 'Upload Date', 'Subscriber', and 'Subscriber'. The table contains three rows of data. To the right of the table is a 'Tools' dropdown menu with options: 'View', 'Download', 'Delete', and 'Actions'.

| File Name   | Vendor | Upload Date          | Upload Date     | Subscriber | Subscriber               |
|---|--------|----------------------|-----------------|------------|--------------------------|
| 1 Sushi_American Mathematical Society_DB1_201703_316... | -      | 08 Apr 2017 10:39:27 | Sushi Scheduler | JR1a       | Colorado School of Mines |
| 2 Sushi_American Mathematical Society_DB1_201702_316... | -      | 08 Apr 2017 10:39:27 | Sushi Scheduler | DB1        | Colorado School of Mines |
| 3 Sushi_American Mathematical Society_DB1_201701_316... | -      | 08 Apr 2017 10:39:27 | Sushi Scheduler | JR1        | Colorado School of Mines |

- A file can be deleted, downloaded...

## Load Usage Data – for any vendor

- A favorite: the “Missing Data” tab:

The screenshot shows the 'Missing Data' tab in the 'Usage Data Loader' interface. At the top, there are tabs for 'Uploaded Files' and 'Missing Data'. Below these is a 'Year' dropdown menu (set to '2017') and a 'Measured By' dropdown menu (set to 'All'). Below these is a table with columns: 'Subscriber', 'Platform', 'Measured By', 'Jan', 'Feb', 'Mar', 'Apr', and 'May'. The table contains five rows of data. Each row has a green checkmark in the 'Jan' and 'Feb' columns and a red exclamation mark in the 'Mar', 'Apr', and 'May' columns.

| Subscriber | Platform         | Measured By                 | Jan | Feb | Mar | Apr | May |
|------------|------------------|-----------------------------|-----|-----|-----|-----|-----|
| 1          | ACS Publications | JR1 - Record views          | ✓   | ✓   | !   | !   | !   |
| 2          | ACS Publications | BR2 - Book sections views   | ✓   | ✓   | !   | !   | !   |
| 3          | ACS Publications | JR1a - Record views archive | ✓   | ✓   | !   | !   | !   |
| 4          | ACS Publications | PR1 - Regular Searches      | ✓   | ✓   | !   | !   | !   |
| 5          | ACS Publications | PR1 - Result Clicks         | ✓   | ✓   | !   | !   | !   |

## Another Demo (data load)



How do I look?



## Usage information in Alma

- Search **Electronic Portfolios** to see Usage Data:

Find  where  contains

|   |  |
|---|--|
| 1 | <b>Nature biotechnology.</b><br>Gale Cengage Business Collection (Gale Cengage Business Collection): getFullTxt<br>Available from 2000. Most recent 1 year(s) not available.<br><a href="#">MMS Debug Screen</a>   <a href="#">Inventory Debug Screen</a>   <a href="#">Get It</a>   <a href="#">Edit Portfolio</a>   <a href="#">View</a>   <a href="#">Deactivate</a>   <a href="#">Order</a>   <a href="#">Create E-Activation Task</a>   <a href="#">Test access</a>   <a href="#">Report To Ex Libris</a>   <a href="#">More Info</a> |
| 2 | <b>Nature biotechnology.</b><br>Gale Cengage Health Reference Center Academic: getFullTxt<br>Available from 2000. Most recent 1 year(s) not available.<br><a href="#">MMS Debug Screen</a>   <a href="#">Inventory Debug Screen</a>   <a href="#">Get It</a>   <a href="#">Edit Portfolio</a>   <a href="#">View</a>   <a href="#">Deactivate</a>   <a href="#">Order</a>   <a href="#">Create E-Activation Task</a>   <a href="#">Test access</a>   <a href="#">Report To Ex Libris</a>   <a href="#">More Info</a>                       |
| 3 | <b>Nature biotechnology.</b><br>Gale Cengage Expanded Academic ASAP: getFullTxt<br>Available from 2000. Most recent 1 year(s) not available.<br><a href="#">MMS Debug Screen</a>   <a href="#">Inventory Debug Screen</a>   <a href="#">Get It</a>   <a href="#">Edit Portfolio</a>   <a href="#">View</a>   <a href="#">Deactivate</a>   <a href="#">Order</a>   <a href="#">Create E-Activation Task</a>   <a href="#">Test access</a>   <a href="#">Report To Ex Libris</a>   <a href="#">More Info</a>                                 |
| 4 | <b>Nature biotechnology.</b><br>Gale Cengage Academic OneFile: getFullTxt<br>Available from 2000. Most recent 1 year(s) not available.<br><a href="#">MMS Debug Screen</a>   <a href="#">Inventory Debug Screen</a>   <a href="#">Get It</a>   <a href="#">Edit Portfolio</a>   <a href="#">View</a>   <a href="#">Deactivate</a>   <a href="#">Order</a>   <a href="#">Create E-Activation Task</a>   <a href="#">Test access</a>   <a href="#">Report To Ex Libris</a>   <a href="#">More Info</a>                                       |

**Title** Nature biotechnology.

**Related Records** 0

**Orders** 0

**Licenses** 0

**Courses** 0

**Combined Usage (last 12 months)** 133

## Usage information in Alma

- Expand and begin to analyze:

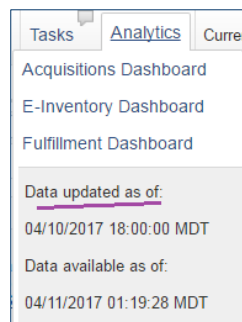


## Jobs relevant to COUNTER harvesting



## Analytics refresh (ETL) happens daily

- Analytics is updated daily, data is taken from Alma.



## SUSHI harvesting job, weekly

- To get SUSHI data from vendors into Alma, a job will run weekly
  - General System Administrator** can activate, deactivate, schedule, or monitor the job, view a job's history, report, and events, and configure email notifications for the job on the Monitor Jobs page.
  - Acquisitions Administrator** can activate, deactivate, or schedule this job, or run it manually.
  - Vendor Manager** can run the job manually for a single vendor account and view a history of how often this was performed.

Acquisition Jobs Configuration

PO Line package job

Status ☒ Active ☐ Inactive PO Line package job schedule DAILY (not list

PO Line package job parameters

PO Line continuous limit \* 1

PO Line one time limit \* 100

Package PO Line by Fund ☐

SUSHI harvesting job

Status ☐ Active ☒ Inactive SUSHI harvesting job schedule Every Saturda

Run Now Email Notification

## Subscribers



## Subscribers - setup

- Subscribers represent the **account** with a vendor. Subscriber information is provided by, or agreed upon with, the vendor.
- For an institution, subscribers can be used to separate the usage data by **campus or library** (when the vendor can distinguish access to its resources by the IP addresses of each entity).
- Alma requires you to define at least one subscriber.



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## Subscribers - setup

- Subscribers can be defined in the Acquisition Configuration Menu

| Table Information |             |                   |             |
|-------------------|-------------|-------------------|-------------|
| Sub System        | ACQUISITION | Table Name        | Subscribers |
| Updated By        | -           | Updated on        | -           |
| Patron Facing     | No          | Table Description | Subscribers |
| Table code        | Subscribers |                   |             |

Subscribers

Filter: English

|   | Enabled                             | Display | Order | Code           | Description              | Translation              |
|---|-------------------------------------|---------|-------|----------------|--------------------------|--------------------------|
| 1 | <input checked="" type="checkbox"/> |         |       | ColSchoolMines | Colorado School of Mines | Colorado School of Mines |

Create a New Code Table Row

Quick Add

Code

Description

Default Value

Yes

Add Row

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## Subscribers - setup

- Subscriber information is part of the SUSHI account

| SUSHI Account Details |  |
|-----------------------|--|
| Vendor name           | De Gruyter   |
| Vendor code           | GRUYTER  |
| Account Identifier    | SUSHI Account *Walter de Gruyter Reference Global Journals |
| Vendor URL            | https://ams.degruyter.com/1/services/SushiService          |
| Status                | Active   |
| Subscriber *          | Integration  |
| Requester ID          | 44435  |
| Customer ID           | 2988   |
| User Name             | hel...   |
| Report Type           | JR1  |
| Requester Email       | ht...  |
| Requester Name        | J...   |
| Customer Name         | K...   |
| Password              | *****  |
| Counter Release       | R4   |

## Subscribers - setup

- Subscriber can be used when filtering

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Usage Data Loader

Uploaded Files Missing Data

Quick Add

Vendor\* Subscriber\* Integration Upload File Upload File

Status All Files Subscriber All Upload Date All Uploaded Report Type All Vendor All

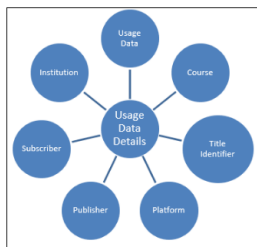
| File Name  | Vendor     | Upload Date          | Uploading User  | Subscriber  | Status   |
|--|------------|----------------------|-----------------|-------------|----------|
| Sushi: Walter de Gruyter Reference Global Journals | De Gruyter | 06 Apr 2017 06:57:58 | Sushi Scheduler | Integration | Fully pr |

## Analytics Reporting



## Analytics Reporting

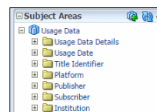
- COUNTER data exists in Analytics “Usage Data” and “Cost Usage” subject areas.



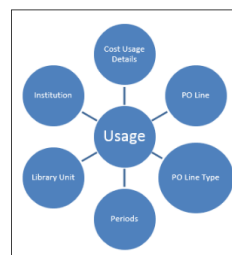
Star Diagram - Usage Data

### Field Descriptions

The following lists the fields available in Usage Data.



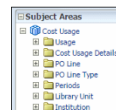
Usage Data - Field Descriptions



Star Diagram - Cost Usage

### Field Descriptions

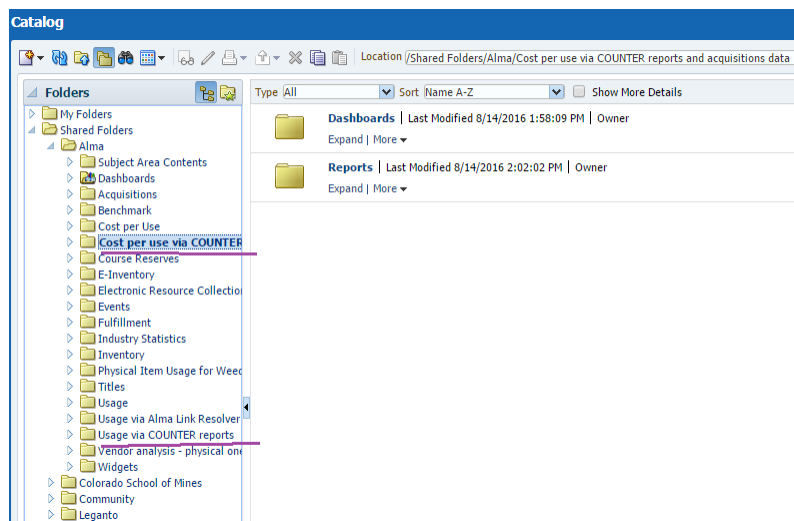
The following lists the fields available in Cost Usage.



Cost Usage

## Analytics Reporting

- Reports and Dashboards are already offered for immediate use:



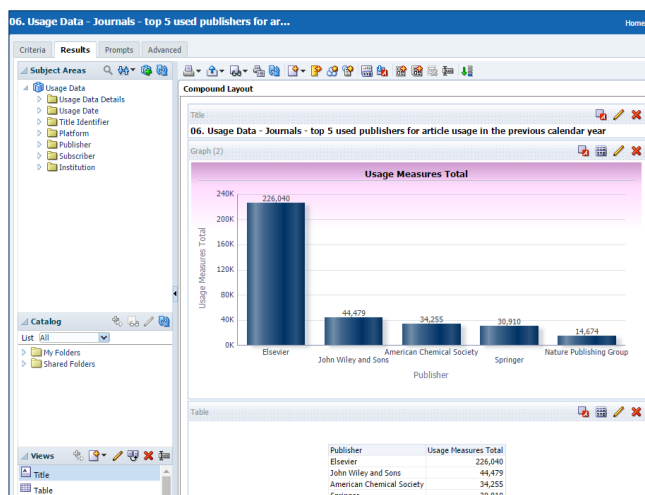
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## Analytics Reporting

- Out of the box report:



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## Analytics Reporting, documentation:

- **Usage Data:**  
[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/Alma\\_Online\\_Help\\_\(English\)/Analytics/160Usage\\_Data](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Analytics/160Usage_Data)
- **Cost Usage:**  
[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/Alma\\_Online\\_Help\\_\(English\)/Analytics/170Cost\\_Usage](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Analytics/170Cost_Usage)
- Remember also the **Link Resolver Usage:**  
[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/Alma\\_Online\\_Help\\_\(English\)/Analytics/150Link\\_Resolver\\_Usage](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Analytics/150Link_Resolver_Usage)
- Understanding the “**Cost Usage**” Subject Area:  
[https://knowledge.exlibrisgroup.com/@api/deki/files/48563/Analytics\\_-\\_Overview\\_of\\_calculation\\_of\\_the\\_cost\\_per\\_use\\_in\\_the\\_Cost\\_Usage\\_subject\\_area\\_with\\_DB\\_and\\_JR1.pptx?origin=mt-web](https://knowledge.exlibrisgroup.com/@api/deki/files/48563/Analytics_-_Overview_of_calculation_of_the_cost_per_use_in_the_Cost_Usage_subject_area_with_DB_and_JR1.pptx?origin=mt-web)

## Next Steps and Support Resources



## Next Steps and Support Resources

- Documentation and presentations:
  - **Online Help:**  
[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/Alma\\_Online\\_Help\\_\(English\)/Acquisitions/090Acquisitions\\_Infrastructure/010Managing\\_Vendors/Managing\\_COUNTER-Compliant\\_Usage\\_Data](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Acquisitions/090Acquisitions_Infrastructure/010Managing_Vendors/Managing_COUNTER-Compliant_Usage_Data)
  - *May Release Notes!*
  - **Ask the Expert, 2017-01-30 COUNTER Report Management in Alma – Functionality and Rollout:**  
[https://knowledge.exlibrisgroup.com/Alma/Training/Ask\\_the\\_Alma\\_Expert/9967\\_COUNTER\\_Report\\_Management\\_in\\_Alma\\_%E2%80%93\\_Functionality\\_and\\_Rollout](https://knowledge.exlibrisgroup.com/Alma/Training/Ask_the_Alma_Expert/9967_COUNTER_Report_Management_in_Alma_%E2%80%93_Functionality_and_Rollout)
  - **Ask the Expert: COUNTER Report Harvesting and Uploading in Alma:**   
<https://www.youtube.com/watch?v=Mnodes8ZRZsg>
  - **Alma matters** (no password required):  
<https://proquestmeetings.webex.com/proquestmeetings/lr.php?RCID=af34321ace684023ad9c3ca08c83fd63>
  - **Presentation on Analytics Cost Usage:**  
[https://knowledge.exlibrisgroup.com/@api/deki/files/48654/Analytics\\_-\\_Overview\\_of\\_calculation\\_of\\_the\\_cost\\_per\\_use\\_in\\_the\\_Cost\\_Usage\\_subject\\_area\\_with\\_DB\\_and\\_JR1.pptx](https://knowledge.exlibrisgroup.com/@api/deki/files/48654/Analytics_-_Overview_of_calculation_of_the_cost_per_use_in_the_Cost_Usage_subject_area_with_DB_and_JR1.pptx)

## Q & A

Any Questions?





## Session Survey Evaluation

Please use the following link  
<https://www.surveymonkey.com/r/techsem2017>  
to provide feedback on your sessions.

