Uploading COUNTER Reports and Configuring SUSHI in the Client Center and Intota

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ExLibris
a ProQuest Company

Introductions

- Amy Pemble, Product Manager, Resource Management
- Scott Shull, Team Leader, Global Education

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Objectives and Target Audience

- Description:
  - In this session we will review the data harvesting methods, configuration requirements and the process for manually uploading Counter reports
- Objective:
  - By the end of this session you will:
    - Realize the changes to Counter data retrieval in 2017 and beyond;
    - Understand the data retrieval methods and learn how to configure your vendors for DRS and/or SUSHI harvested reports;
    - Walk through the process of manually uploading Counter-compliant usage reports
- Target Audience:
  - Technical Services / Systems Librarians working with Counter in the Client Center or Intota

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Agenda

1. **2017 Changes to COUNTER Data Retrieval**
2. **Project COUNTER, Data Retrieval Options and Configuration**
3. **Workflow for Manually Uploading Counter Reports**
4. **Hands-on Exercise**
5. **Next Steps, Support Resources and Survey**

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Changes to COUNTER Data Retrieval in 2017

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What's Changing?

- **Two DRS Counter data collections in 2017 and beyond:**
  - Mid-year collection July (January – June usage data)
  - Year-end collection in February 2018 (January-December 2017 usage data)
- **Changes to provider's authentication requirements**
  - **IP authentication** requires some custom configuration so that Ex Libris can your usage data at the Provider's site;
  - **Two-Factor authentication** - Impossible for Ex Libris to collect usage data from third parties

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Supporting SUSHI in 2017

- **Increasing the SUSHI data harvester capacity**
  - Increases the volume of reports that can be uploaded and processed simultaneously
- **Integrate a back-end tool that enables more error-free manually uploaded reports**
  - Automatically troubleshoots and fixes the more common errors encountered with the usage data files
- **Improve and document better client-facing error reports**
  - Make it easier for customers to fix upload errors and re-harvest the usage report themselves

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Usage Data Harvesting and Uploading Options

- **For Counter Usage data in Intota or the Client Center:**
  - Configure Administration-based (DRS) harvesting and uploads
  - Configure automated SUSHI data harvesting
  - Gather your own usage data from your providers and manually upload it into Intota for viewing in Intota Assessment

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Project COUNTER Overview

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What *is* Project Counter?

- Project COUNTER – www.projectcounter.org
  (**C**ounting **O**nline **U**sage of **N**etworked **E**lectronic **R**esources)
- Created to improve the reliability of online usage statistics
- Project COUNTER objective is to create an electronic usage reporting standard which ensures that all Counter-compliant vendor online usage data is credible, compatible and consistent

Code of Practice – Release 4:
http://www.projectcounter.org/code_practice.html

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Project Counter

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Data Retrieval Options

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Usage Data Retrieval Options

- Data Upload services are configured using the Data Retrieval Service Request Form in Intota and the Client Center
- Chose from two data retrieval methods:
  - Administration-based Harvesting (Technical Support team) (counterdrs@serialssolutions.com)
  - SUSHI-Protocol Harvesting (Auto-Harvested)

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Usage Data Retrieval Options

1. **Administration-based Harvesting:** DRS team retrieves, cleans, and uploads your Project-COUNTER compliant usage statistics from various vendors, providers, and publishers
   - DRS uploads occur twice a year: July and January of the following year
   - January (annual) upload overlays entire previous mid-year uploaded data
2. **SUSHI:** Automated, server-to-server (XML) upload protocol
   - Monthly uploads for discrete month of usage data
   - Data is uploaded 2-3 months behind the actual upload date (e.g. January usage data is uploaded in March)

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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/

COUNTER
CONSISTENT CREDIBLE COMPARABLE

SUSHI
STANDARDIZED USAGE STATISTICS HARVESTING INITIATIVE

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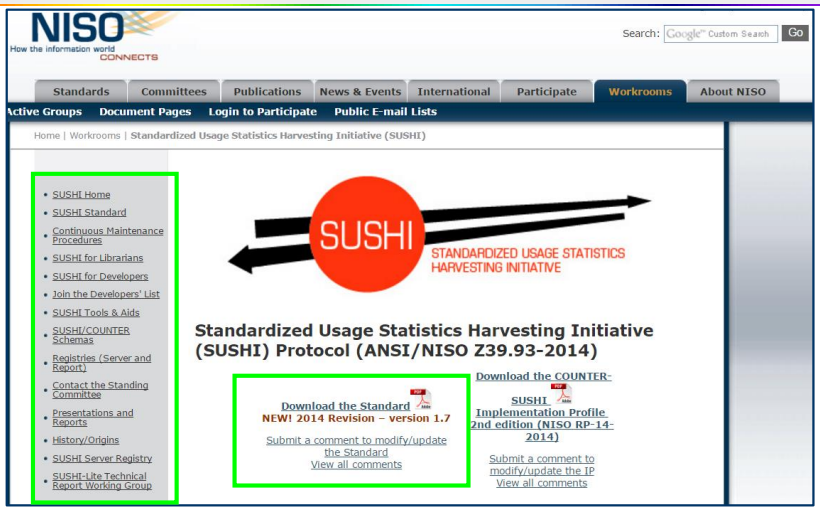
NISO / SUSHI Standard



Registry of SUSHI Providers:
http://www.niso.org/workrooms/sushi/registry_server/
www.projectcounter.org

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Data Retrieval Configuration in Intota and the Client Center

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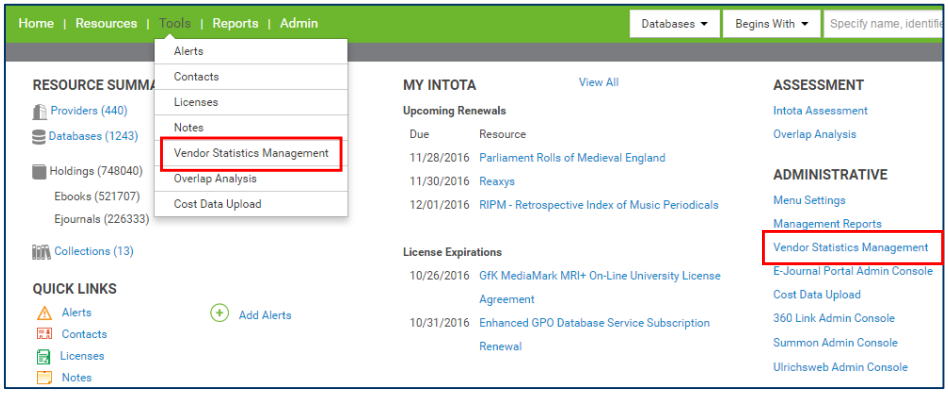
Vendor Statistics Management



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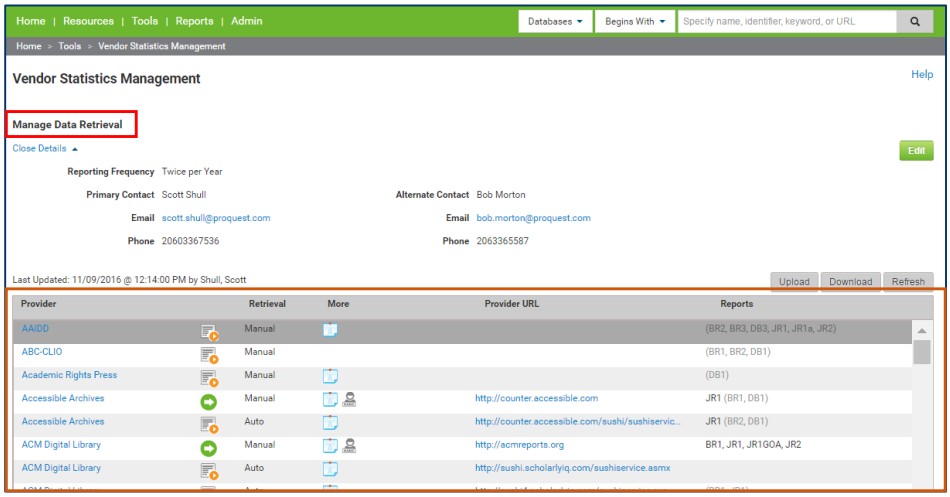
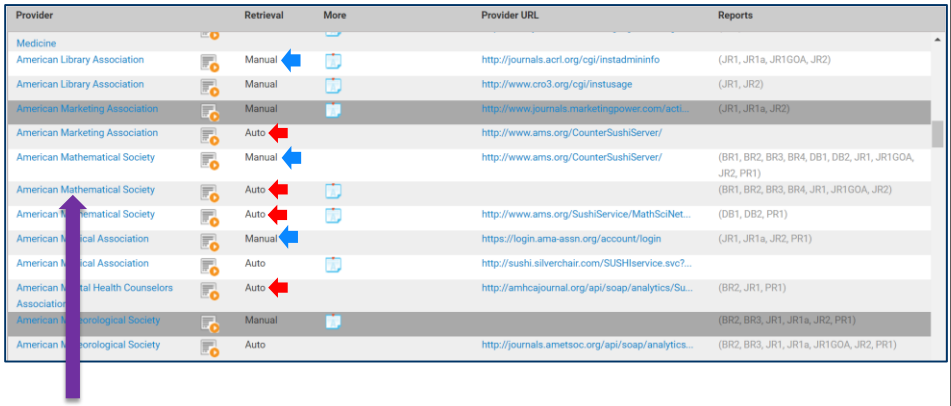
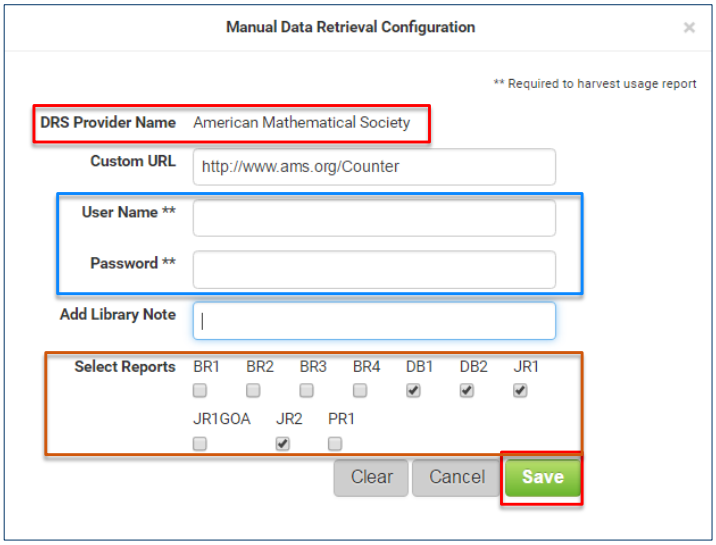
DRS Data Retrieval Service Form



DRS Vs. SUSHI Configuration



Data Retrieval Configuration



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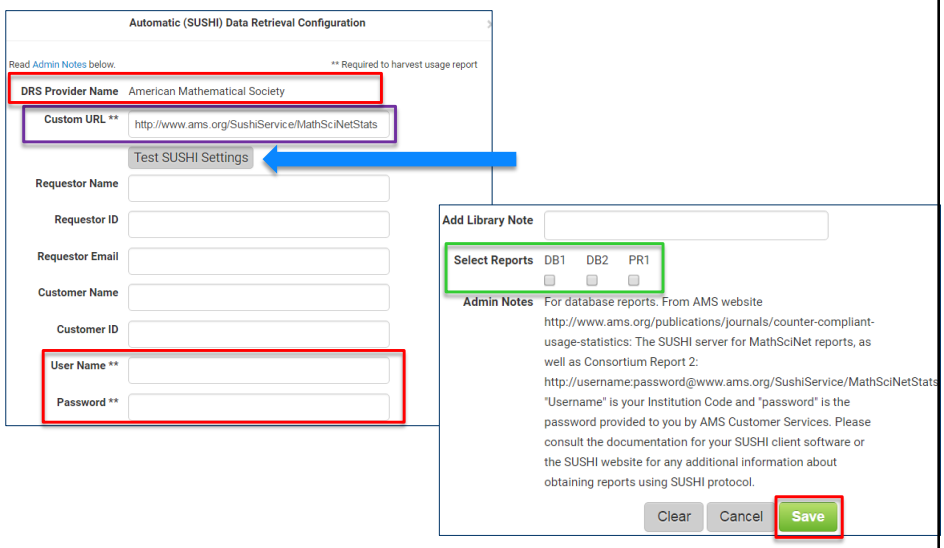
SUSHI Configuration



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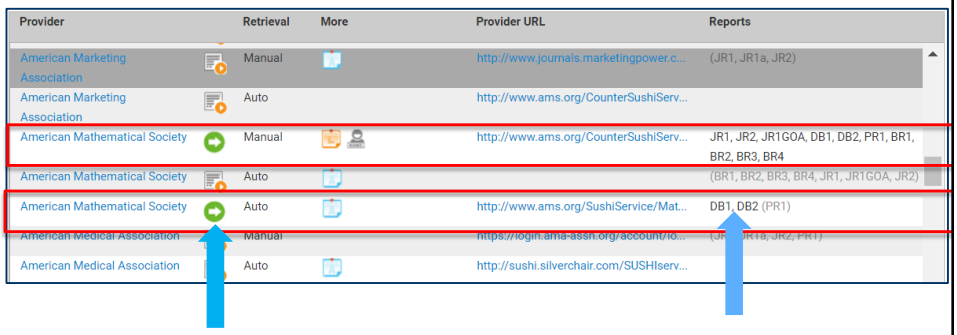
Completed Configuration



Provider	Retrieval	More	Provider URL	Reports
American Marketing Association	Manual		http://www.journals.marketingpower.c...	(JR1, JR1a, JR2)
American Marketing Association	Auto		http://www.ams.org/CounterSushiServ...	
American Mathematical Society	Manual		http://www.ams.org/CounterSushiServ...	JR1, JR2, JR1GOA, DB1, DB2, PR1, BR1, BR2, BR3, BR4
American Mathematical Society	Auto			(BR1, BR2, BR3, BR4, JR1, JR1GOA, JR2)
American Mathematical Society	Auto		http://www.ams.org/SushiService/Mat...	DB1, DB2 (PR1)
American Medical Association	Manual		https://login.ama-assn.org/account/lo...	(JR1, JR1a, JR2, PR1)
American Medical Association	Auto		http://sushi.silverchair.com/SUSHIserv...	

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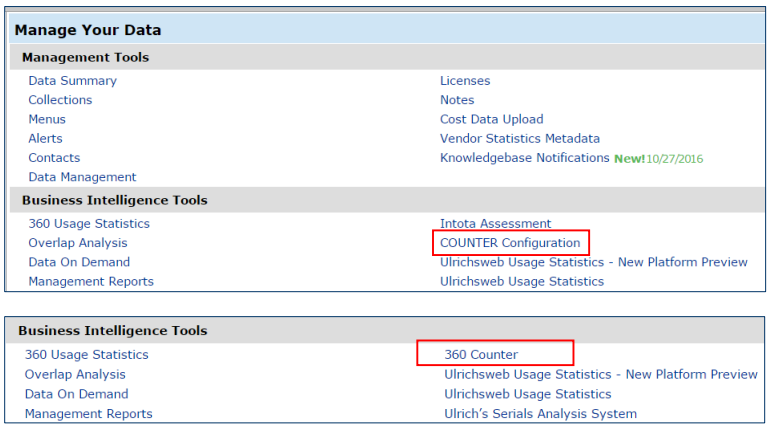
Data Retrieval Service (DRS) Form



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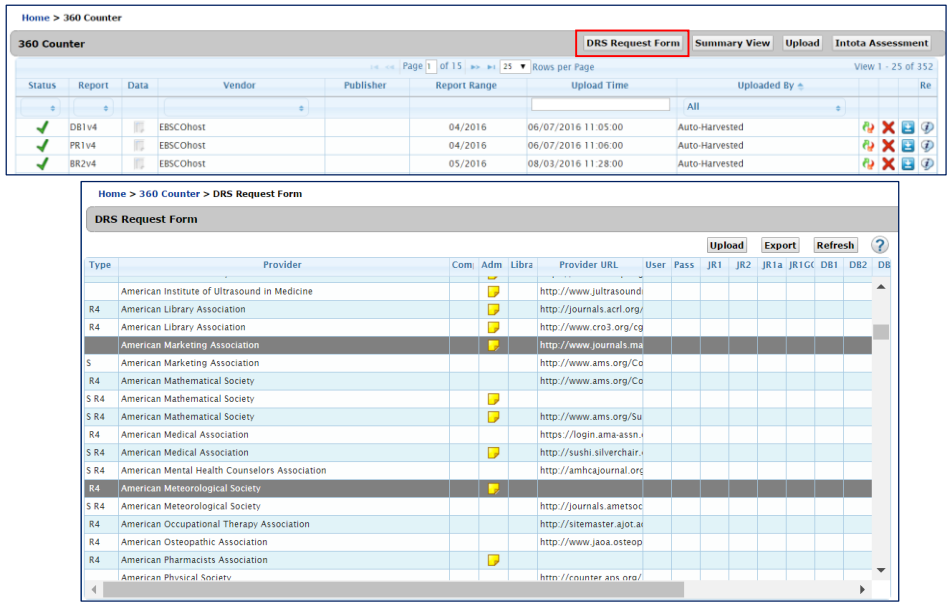
Data Retrieval Service Form



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DRS v. SUSHI Configuration

Type	Provider	Com	Adm	Libra	Provider URL	User	Pass	JR1	JR2
S R4	American Institute of Aeronautics and A				http://arc.aiaa.org/api/soap/analytics/SushiSe				
R4	American Institute of Physics	✓			http://scitation.aip.org/for-librarians	AAPT-	stats4	✓	
S R4	American Institute of Physics				https://scitation.aip.org/admin/statistics/susl				
S R4	American Institute of Physics				https://scitation.aip.org/admin/statistics/susl				
	American Institute of Ultrasound in Mec				http://www.jultrasoundmed.org/cgi/instusage				
R4	American Library Association				http://journals.acrl.org/cgi/instadmininfo				
R4	American Library Association				http://www.cro3.org/cgi/instusage				
	American Marketing Association				http://www.journals.marketingpower.com/act				
S	American Marketing Association				http://www.ams.org/CounterSushiServer/				
R4	American Mathematical Society	✓			http://www.ams.org/CounterSushiServer/	SYRAL	s3w8E	✓	✓
S R4	American Mat ematical Society								
S R4	American Mat ematical Society				http://www.ams.org/SushiService/MathSciNet				
R4	American Me al Association				https://login.ama-assn.org/account/login				
S R4	American Me al Association				http://sushi.silverchair.com/SUSHIservice.svc?				
S R4	American Mental Health Counselors Ass				http://amhcajournal.org/api/soap/analytics/S				

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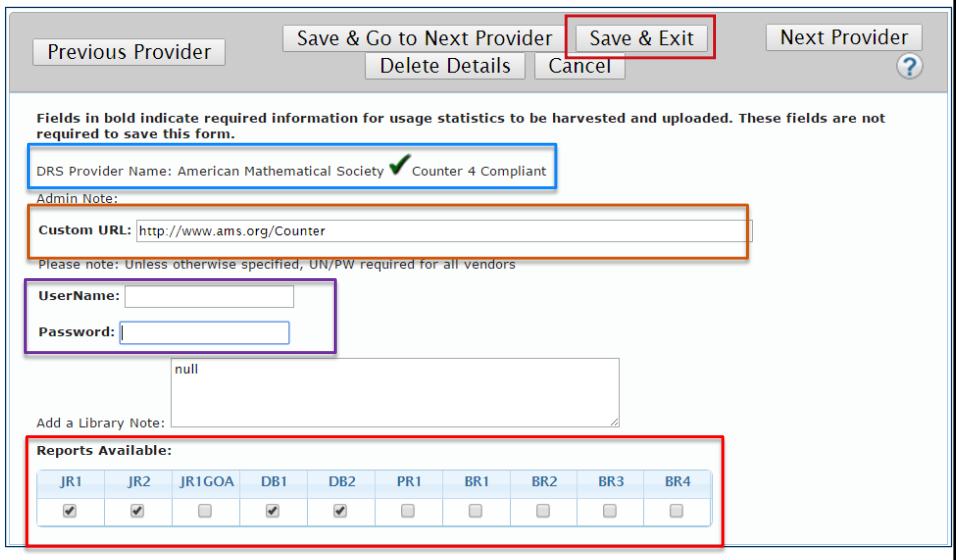
Data Retrieval Configuration



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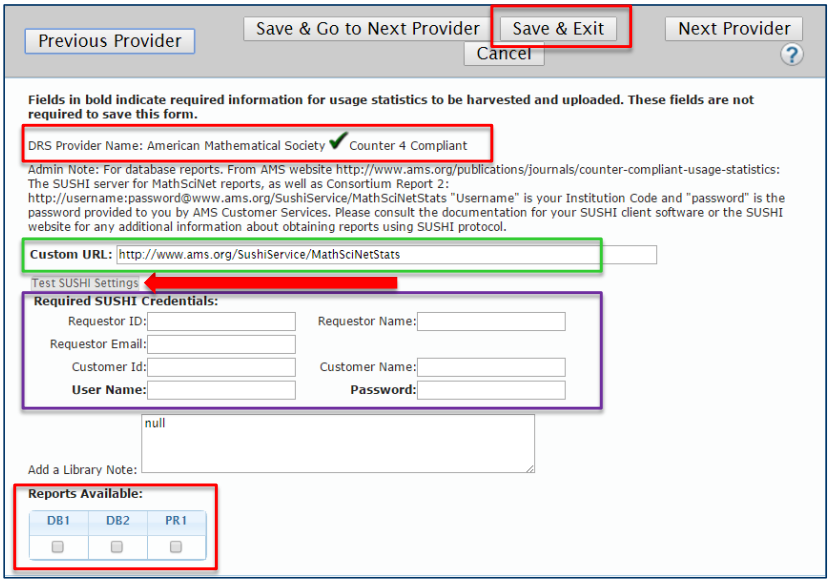
SUSHI Configuration



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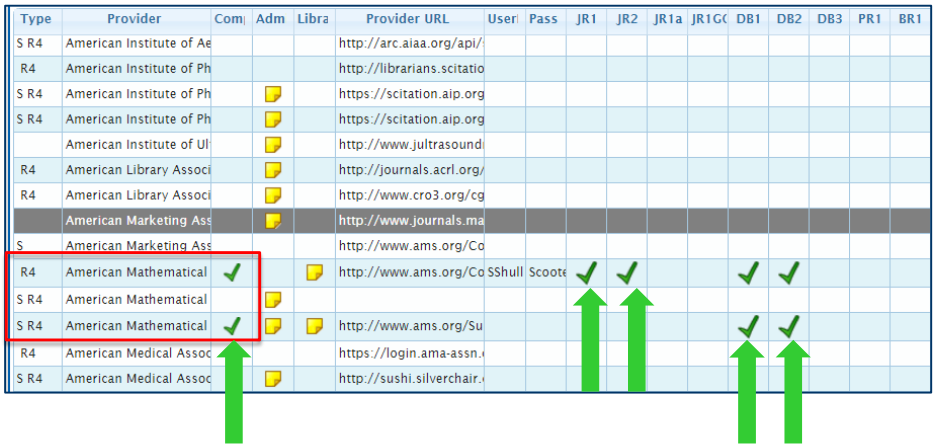
Completed Provider Configuration



Type	Provider	Com	Adm	Libra	Provider URL	User	Pass	JR1	JR2	JR1a	JR1G	DB1	DB2	DB3	PR1	BR1
S R4	American Institute of Ae				http://arc.aiaa.org/api/											
R4	American Institute of Ph				http://librarians.scitatio											
S R4	American Institute of Ph				https://scitation.aip.org											
S R4	American Institute of Ph				https://scitation.aip.org											
	American Institute of Ul				http://www.jultrasound											
R4	American Library Associ				http://journals.acrl.org/											
R4	American Library Associ				http://www.cro3.org/cg											
	American Marketing Ass				http://www.journals.ma											
S	American Marketing Ass				http://www.ams.org/Co											
R4	American Mathematical	✓			http://www.ams.org/Co	SShull	Scoote	✓	✓			✓	✓			
S R4	American Mathematical															
S R4	American Mathematical	✓			http://www.ams.org/Su							✓	✓			
R4	American Medical Assoc				https://login.ama-assn.											
S R4	American Medical Assoc				http://sushi.silverchair.											

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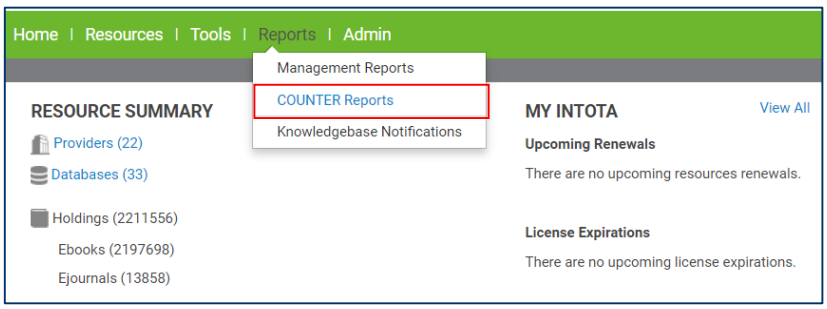
Counter Reports in Intota



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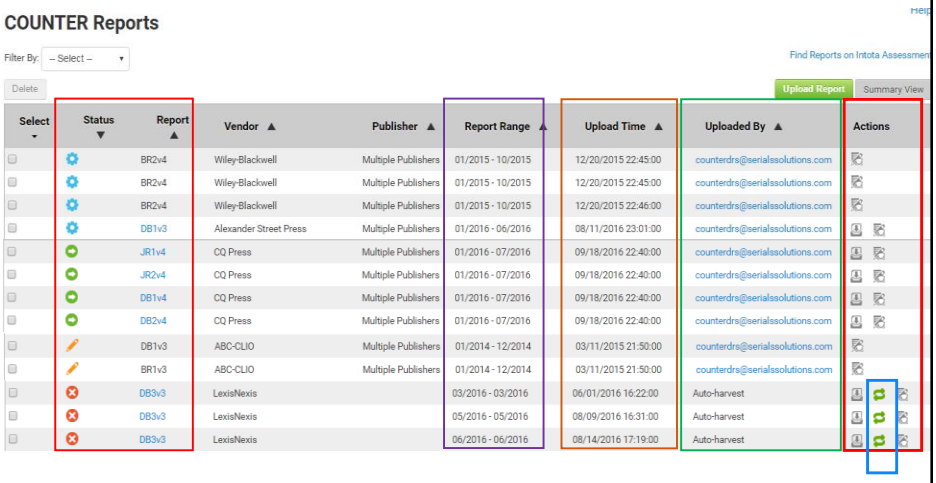
Counter Reports Page



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Counter Reports Page

Manage Your Data

Management Tools

Data Summary	Licenses
Collections	Notes
Menus	Cost Data Upload
Alerts	Vendor Statistics Metadata
Contacts	Knowledgebase Notifications **New!** 10/27/2016
Data Management	

Business Intelligence Tools

360 Usage Statistics	Intota Assessment
Overlap Analysis	COUNTER Configuration
Data On Demand	Ulrichsweb Usage Statistics - New Platform Preview
Management Reports	Ulrichsweb Usage Statistics

Business Intelligence Tools

360 Usage Statistics	360 Counter
Overlap Analysis	Ulrichsweb Usage Statistics - New Platform Preview
Data On Demand	Ulrichsweb Usage Statistics
Management Reports	Ulrich's Serials Analysis System

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Counter Reports Page

Home > 360 Counter

360 Counter

DRS Request Form | Summary View | Upload | Intota Assessment

Page 1 of 131 | 25 Rows per Page | View 1 - 25 of 3,259

Status	Report	Data	Vendor	Publisher	Report Range	Upload Time	Uploaded By	Re
							All	
	JR2v4		Taylor & Francis		11/2016	01/08/2017 10:32:00	Auto-Harvested	
	JR1v4		Taylor & Francis		11/2016	01/08/2017 10:31:00	Auto-Harvested	
	PR1v4		Taylor & Francis		11/2016	01/08/2017 10:31:00	Auto-Harvested	
	PR1v4		American Chemical Society		11/2016	01/08/2017 10:31:00	Auto-Harvested	
	JR1v4		American Chemical Society		11/2016	01/08/2017 10:31:00	Auto-Harvested	
	JR2v4		Taylor & Francis		10/2016	12/07/2016 10:45:00	Auto-Harvested	
	PR1v4		Taylor & Francis		10/2016	12/07/2016 10:45:00	Auto-Harvested	
	BR2v4		EBSCOhost		01/2016 - 10/2016	12/06/2016 21:08:00	counterdrs@serialssolutions.com	
	JR1v4		Wiley-Blackwell		01/2016 - 10/2016	12/06/2016 21:02:00	counterdrs@serialssolutions.com	
	PR1v4		JSTOR	Multiple Publishers	01/2016 - 10/2016	12/06/2016 20:59:00	counterdrs@serialssolutions.com	
	PR1v4		University of Chicago Press	Multiple Publishers	01/2016 - 10/2016	12/06/2016 20:57:00	counterdrs@serialssolutions.com	
	PR1v4		Salem Press	Multiple Publishers	01/2016 - 10/2016	12/06/2016 20:56:00	counterdrs@serialssolutions.com	
	BR2v4		Wiley-Blackwell	Multiple Publishers	01/2014 - 05/2014	07/01/2014 04:38:00	alchiabai@bsu.edu	
	JR1GOAv4		American Mathematical Society		01/2014 - 04/2014	05/26/2014 22:42:00	alchiabai@bsu.edu	
	BR2v4		Gale	Multiple Publishers	01/2014 - 05/2014	06/02/2014 04:43:00	alchiabai@bsu.edu	
	JR2v4		HighWire Press	Multiple Publishers	01/1970 - 04/2014	06/02/2014 05:54:00	alchiabai@bsu.edu	
	DB1v4		Adam Matthew Digital	Multiple Publishers	01/2014 - 04/2014	05/21/2014 04:47:00	alchiabai@bsu.edu	
	JR2v4		HighWire Press	Multiple Publishers	01/1970 - 06/2014	07/15/2014 05:08:00	alchiabai@bsu.edu	
	JR1v4		American Society of Mechanical Engineers	Multiple Publishers	01/2014 - 12/2014	05/28/2014 05:54:00	alchiabai@bsu.edu	
	JR2v4		American Society of Mechanical Engineers	Multiple Publishers	01/2014 - 12/2014	05/28/2014 21:33:00	alchiabai@bsu.edu	

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Recommendations and Best Practices

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SUSHI Need-to-Knows/Reminders

- SUSHI reports represent discrete *monthly* usage
  - e.g. 12 reports per year (one for each month) for each report type requested, by Vendor
- Data contained in SUSHI uploaded reports in Intota or Client Center run 2 months behind the actual upload date
- SUSHI is a technological work-in-progress; Upload errors, especially early on are common

Report Range	Upload Time
09/2016	11/06/2016 12:42:00
09/2016	11/06/2016 12:42:00
09/2016	11/06/2016 12:41:00
08/2016	10/04/2016 11:57:00
08/2016	10/04/2016 11:57:00
08/2016	10/04/2016 11:56:00
07/2016	09/07/2016 11:20:00
07/2016	09/07/2016 11:19:00

Report Range ▲	Upload Time ▲
06/2016 - 06/2016	08/12/2016 23:15:00
06/2016 - 06/2016	08/12/2016 23:16:00
06/2016 - 06/2016	08/12/2016 23:16:00
07/2016 - 07/2016	09/07/2016 19:18:00
07/2016 - 07/2016	09/07/2016 19:19:00

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Data Error Log Message Definitions

Log Message (Event Type)

Error occurred while receiving the HTTP response to xxxxxx. Possible cause is the service endpoint binding not using the HTTP protocol. Possibly be due to an HTTP request context being aborted by the server (service shut down). See server logs for more details.

Bad Credentials for Provider XXXX.

The HTTP service located at XXXX is too busy.

The request channel timed out.

The underlying connection was closed: The connection was closed unexpectedly.

Timeout expired. The timeout period elapsed prior to completion of the operation or the server is not responding.

Bad SUSHI URL
--or-
Invalid URI: The URI is empty.

Duplicate Report Items Found or Cannot insert duplicate key row or Violation of UNIQUE KEY constraint.

Error: Date Range - Report months are either all NULL or greater than XXXXXX
--or--
Message:Cannot insert the value NULL into column 'Period'

String or binary data would be truncated.

This report has no in-range data.

Report type XXX not supported for provider XXXXXX.

Your request has been rejected by Access Control.

11/2016 - 11/2016	01/11/2017 18:32:00	Auto-harvest	
11/2016 - 11/2016	01/11/2017 18:32:00	Auto-harvest	
11/2016 - 11/2016	01/11/2017 18:32:00	Auto-harvest	

Automatic (SUSHI) Data Retrieval Configuration

Custom URL ** http://www.ams.org/SushiService/MathSciNetStats

Test SUSHI Settings

Requestor Name

Requestor ID

Requestor Email

Customer Name

Customer ID

User Name **

Password **

Go back to the DRS Form, open the provider configuration page and update it.

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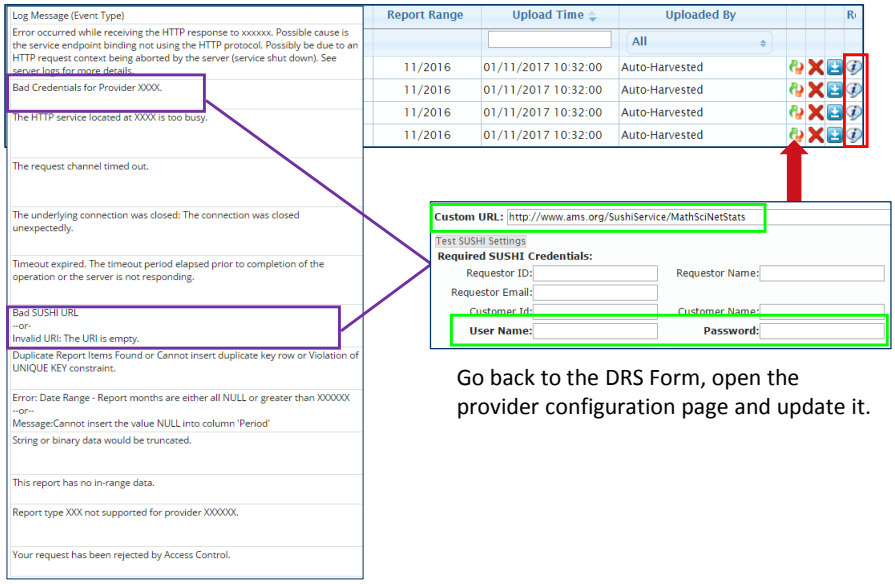
Data Error Log Message Definitions



Go back to the DRS Form, open the provider configuration page and update it.

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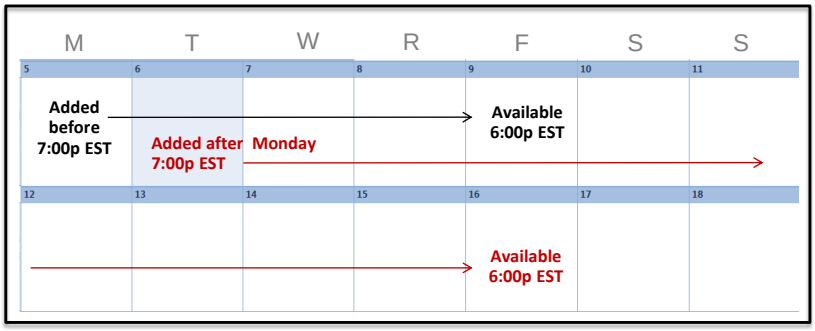
Data Processing Time Frame

ExLibris has a weekly timeframe for uploading usage data from Intota to Intota Assessment:

- Data from Counter is captured weekly, every Monday at 7:00p EST
- Data entered by clients before Monday, 7:00p EST will be available in Intota Assessment Reports by Friday at 6:00p EST



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Best Practices and Recommendations

- Regularly maintain and update your DRS Form with accurate URLs and credentials
- Add helpful notes, instructions and reminders in the DRS Form Configuration Page
- Utilize the "View Log" on the Counter Reports page to view any errors (Data Log Message Definitions)
- Work with Providers to address any SUSHI upload errors; Contact the Technical Support team for assistance

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DRS or SUSHI Uploads?

This decision depends largely on the how you use or review your Counter data for collection management.

DRS (Admin-based) harvesting is uploaded 2 times/year

- Mid-Year upload in July contains data from calendar year January – June
- February upload (following year) contains the previous calendar year's usage data, January – December
- Providers are increasingly demanding more robust authentication

SUSHI: Automatically harvested monthly via XML format

- You'll see more reports on your Counter page
- Work through with upload errors w/ SUSHI more than DRS
- Future trend
- Ask yourself: Are you really analyzing your usage data each month?

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Uploading Counter Reports Manually - Fundamental Upload Requirements

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Upload Fundamentals

- **Fundamental requirements for uploading COUNTER electronic usage reports into Intota or the Client Center:**
  1. Usage data (reports) must be in COUNTER-Compliant format
     or
     you must copy your non-Counter compliant provider data and paste it to a Counter-compliant template to be uploaded
  2. Track/subscribe to the provider's resource – database and titles – for which you are uploading usage data
     e.g. Emerald/Emerald Journals (Database) for PR/DB reports; Titles in that database for JR/BR reports
  3. Usage data must be uploaded as .csv or .txt file

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Uploading COUNTER Reports in Intota and the Client Center

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Reasons for Manual Data Upload

- Special projects or other reporting needs that fall outside of the 2x/year collection
- Provider uses two-factor notification
- Provider doesn't offer a SUSHI option

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COUNTER Data File Upload Basic Workflow

1. Gather your usage data. Navigate to the Provider's website, login and download your usage data reports (files)

2. Save the usage data file locally as a .csv or .txt file
   - Save the file using a naming convention that makes it easy to recognize, remember and identify when you go to upload it (e.g. Oxford.JR1.June.2016.txt)

3. Navigate to the Counter Reports page from the Intota Home Page

4. Click the Upload button on the Counter Reports page
   - Select the Provider (from which you downloaded your usage data)
   - Choose the usage data file to upload (the one you saved earlier)

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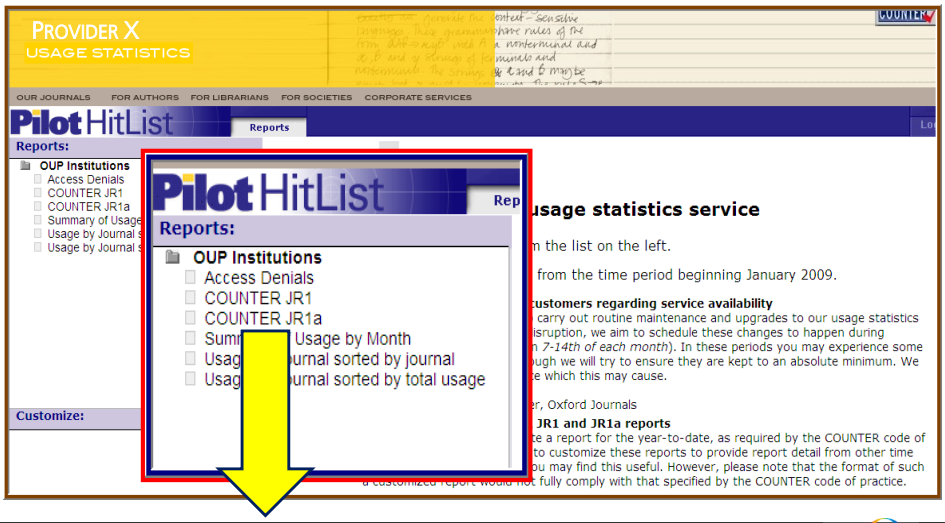
Manual Data Upload - Intota

1. Gather your usage data. Navigate to the Provider's website, login and download your usage data reports (files)



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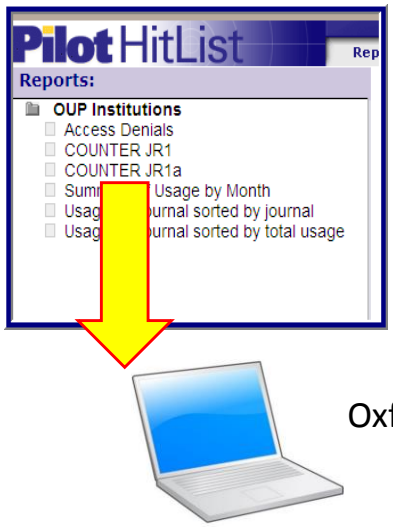
Manual Data Upload

2. Name and save the usage data file locally



Oxford.JR1.June.2016.txt

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Non-Counter Compliant Vendors

BR1(R1)_Template_2015-06-01.csv	BR1(R4)_Template_2015-06-01.csv	BR2 (R1)_Template_2015-06-01.csv
BR2 (R4)_Template_2015-06-01.csv	BR3 (R1)_Template_2015-06-01.csv	BR3 (R4)_Template_2015-06-01.csv
BR4 (R4)_Template_2015-06-01.csv	BR5 (R4)_Template_2015-06-01.csv	DB1 (R3)_Template_2015-06-01.csv
DB1 (R4)_Template_2015-06-01.csv	DB1 (R4)_Template_2015-06-01.tsv	DB2 (R3)_Template_2015-06-01.csv
DB2 (R4)_Template_2015-06-01.csv	DB3 (R3)_Template_2015-06-01.csv	JR1 (R3)_Template_2015-06-01.csv
JR1 (R4)_Template_2015-06-01.csv	JR1 GOA (R4)_Template_2015-06-01....	JR1a (R3)_Template_2015-06-01.csv
JR1a (R4)_Template_2015-06-01.csv	JR2 (R3)_Template_2015-06-01.csv	JR2 (R4)_Template_2015-06-01.csv
MR1 (R4)_Template_2015-06-01.csv	PR1 (R4)_Template_2015-06-01.csv	TIPS_Using_Counter_Templates_Date...

- Save your downloaded usage data (e.g. ProviderX.JR1.June 2016.csv)
- Copy it into one of the appropriate Counter-compliant templates available in the Customer Knowledge Center (Article 7189)

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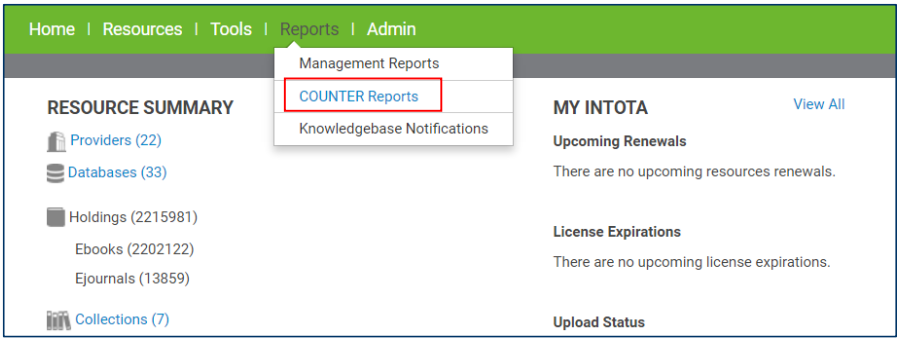
Counter Report Page in Intota

3. Navigate to the Intota Home Page > Reports Menu > Counter Reports



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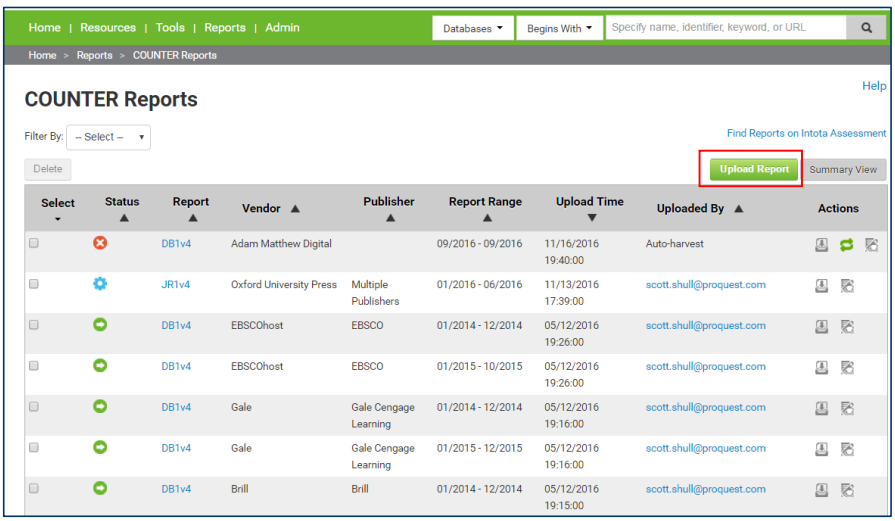
Counter Reports Page

4. Click the Upload Report button on the Counter Reports page



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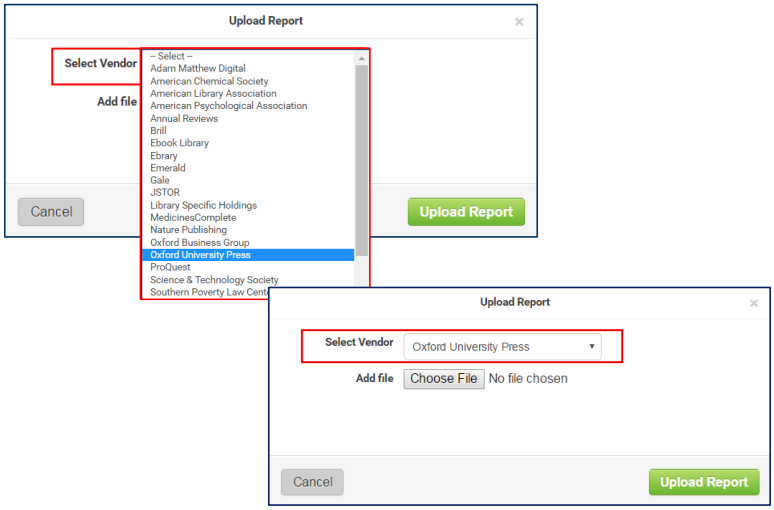
Upload Counter Report

Select the Provider from which you downloaded the usage data file.



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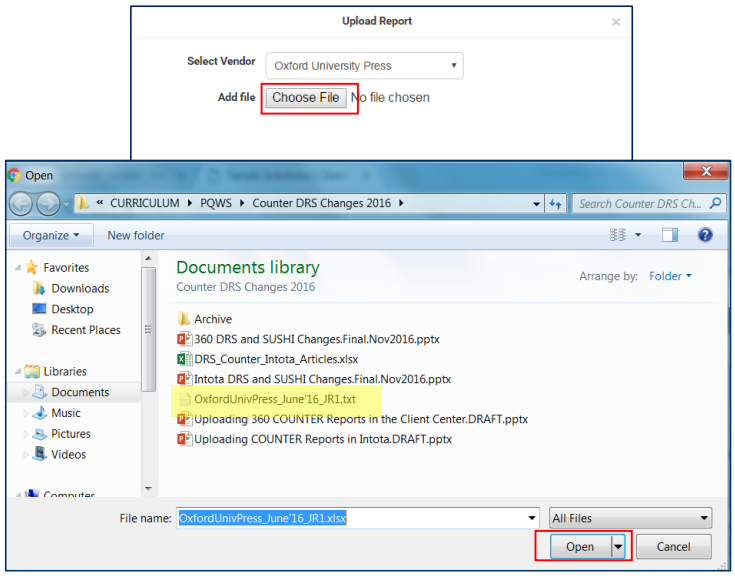
Upload Counter Report



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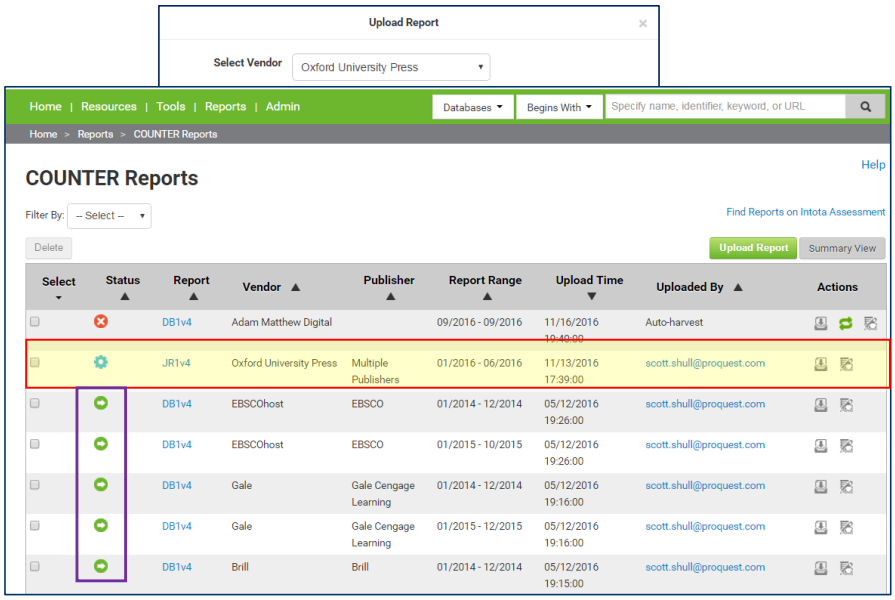
Upload Counter Report



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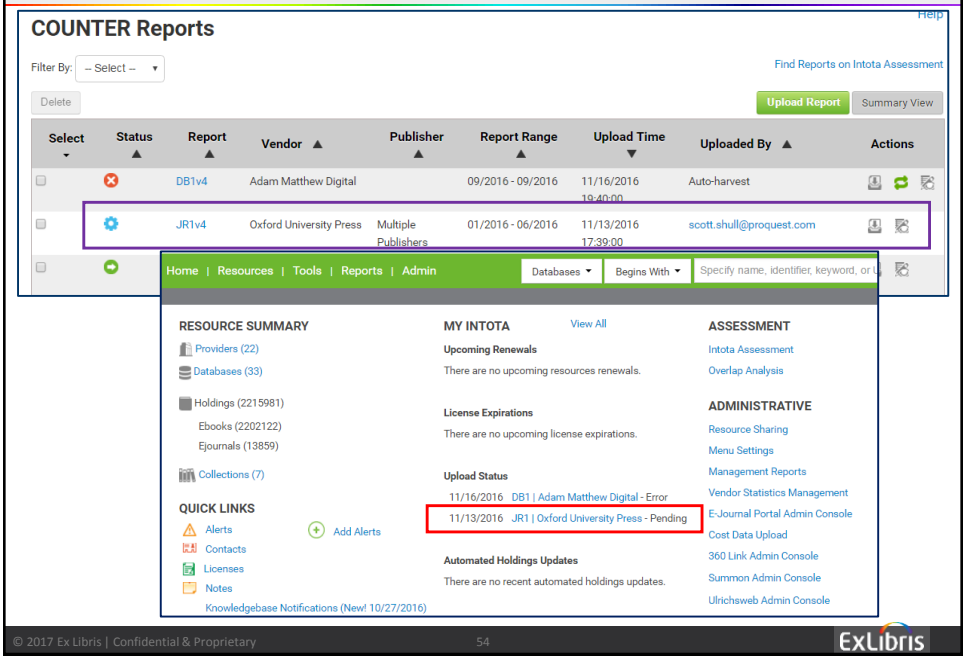
MY Intota



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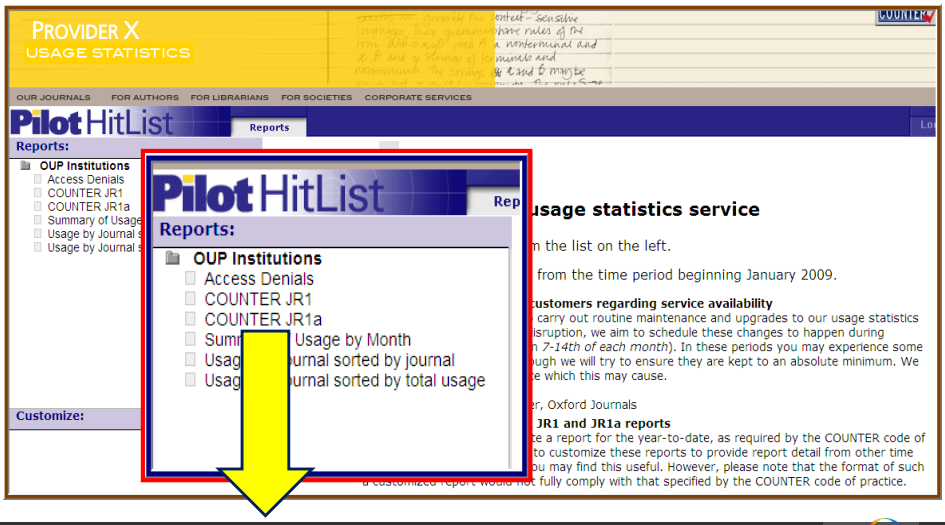
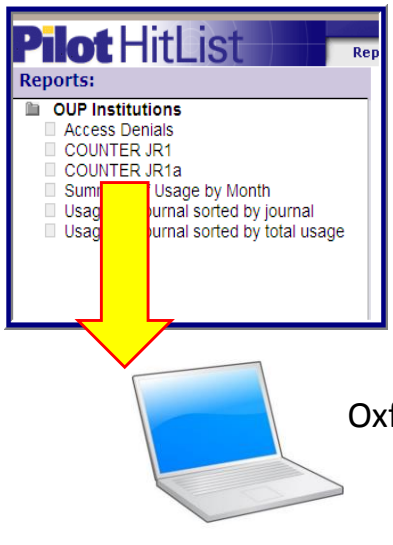
Manual Data Upload – Client Center

1. Gather your usage data. Navigate to the Provider's website, login and download your usage data reports (files)



Manual Data Upload

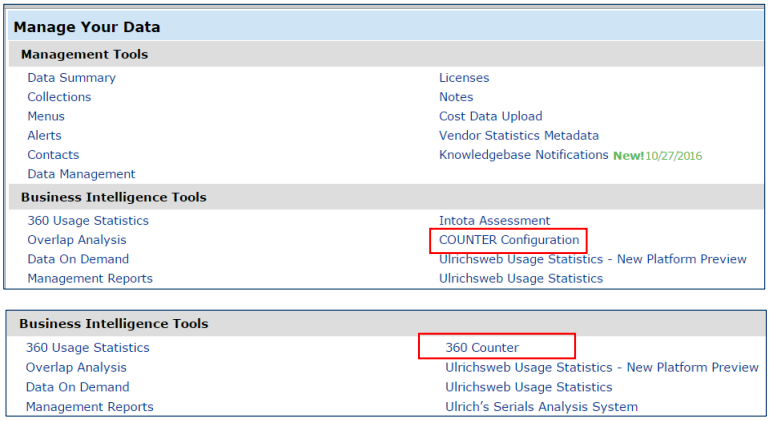
2. Name and save the usage data file locally



Oxford.JR1.June.2016.txt

Client Center Home Page

3. **Navigate to the Client Center,** then to the Counter Reports page



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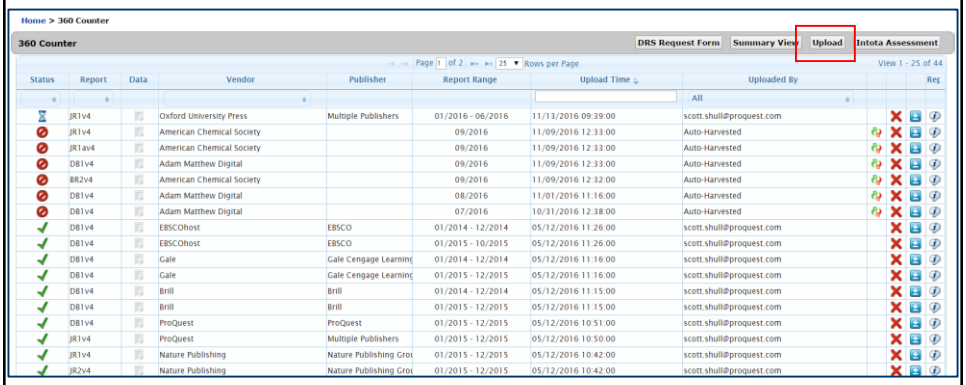
Counter Reports Page

4. Click the Upload button on the Counter Reports page



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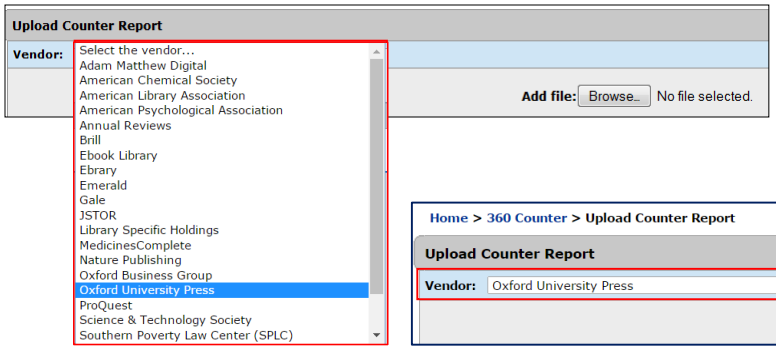
Upload Counter Report

Select the Provider from which you downloaded the usage data file.



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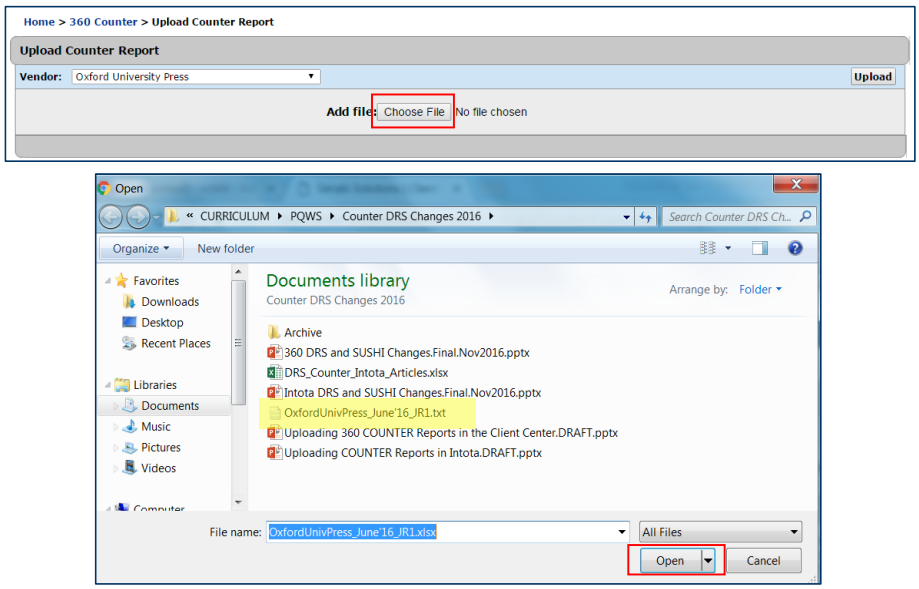
Upload Counter Report



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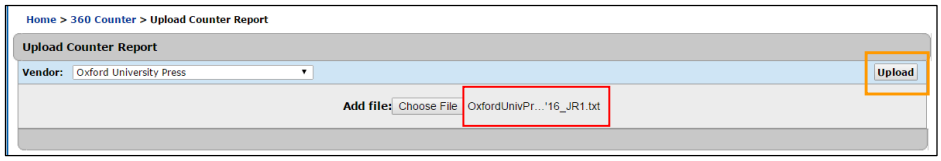
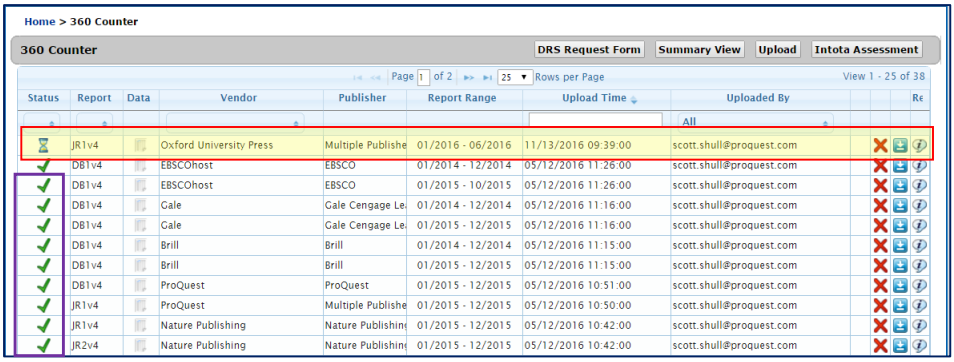
Upload Counter Report





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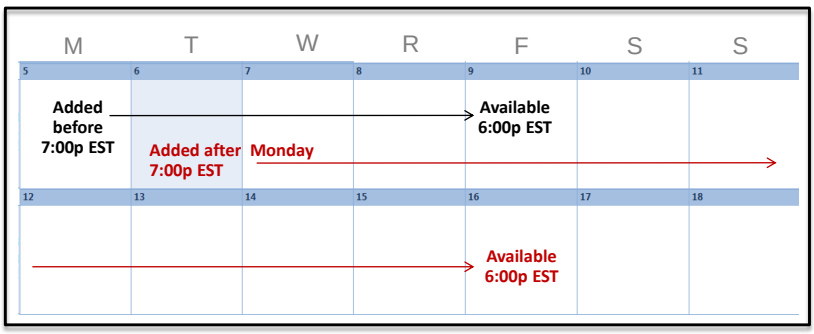
Data Processing Time Frame

ExLibris has a weekly timeframe for uploading usage data from the Intota or the Client Center to Intota Assessment reporting interface:

- Data from Counter is captured weekly, every Monday at 7:00p EST
- Data entered by clients before Monday, 7:00p EST will be available in Intota Assessment Reports by Friday at 6:00p EST



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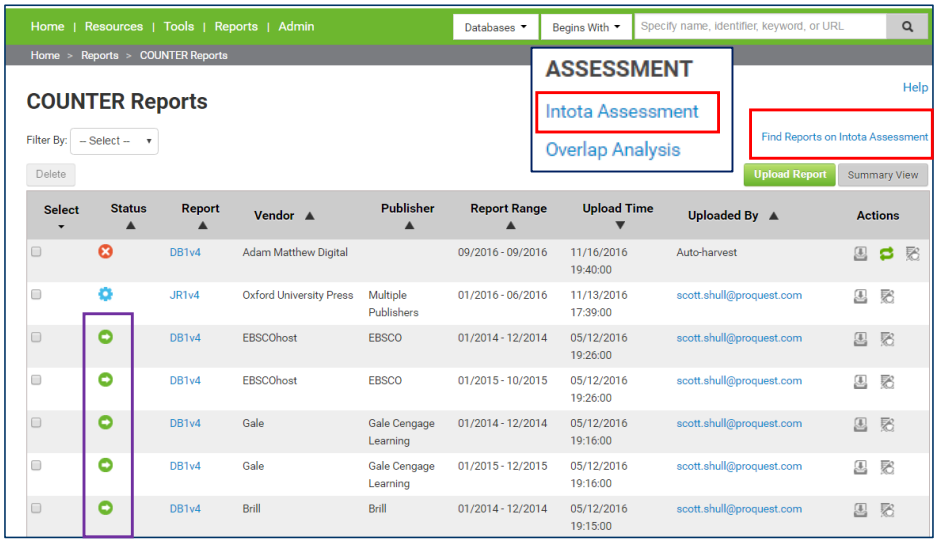
View Reports in Intota Assessment



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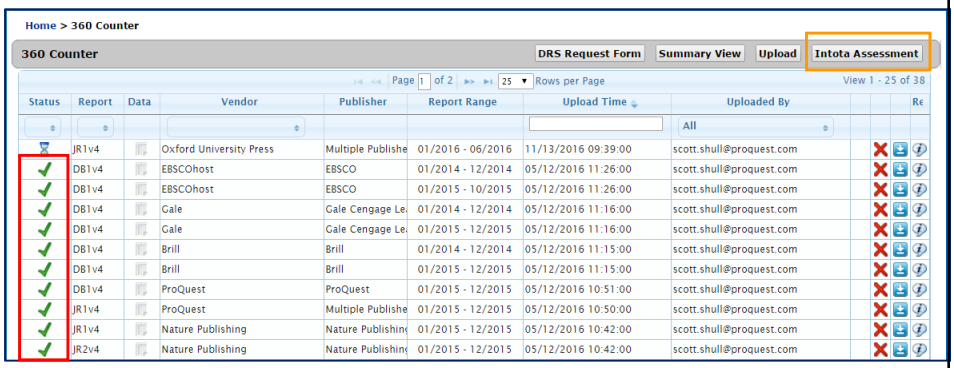
View Reports in Intota Assessment



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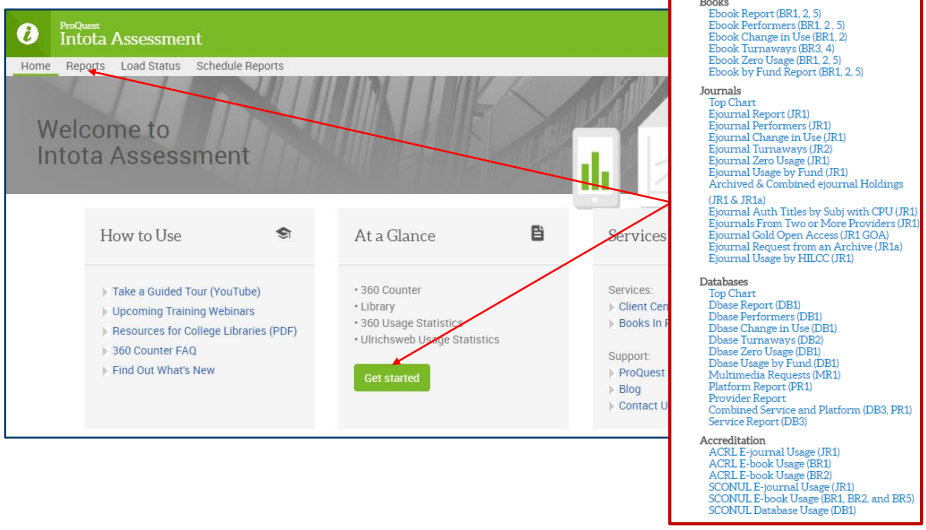
Intota Assessment

Navigate to Intota Assessment to view your successfully uploaded reports.



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Next Steps and Support Resources

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Next Steps and Support Resources

- Include documentation links relative to the topic:
  - Intota: Uploading Counter Reports
  - 360 Counter: Uploading Counter Reports
  - Providers Requiring Two-Factor Authentication
  - IP Authenticated Providers
- Additional support resources within the ExLibris Ecosystem:
  - Idea Exchange
  - System Status Pages: Single Tenant ENV / Multi-Tenant ENV
  - Developer Network
- Technical Seminar Presentations
  (located in the Cross-Product section of the CKC)

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Q & A

Questions?

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Session Survey Evaluation

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https://www.surveymonkey.com/r/techsem2017
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