



# Managing COUNTER Reports in Alma

ELUNA 2017

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*Originally created by Vlad Buldyrev and Yaala Ariel-Jones*

# Objectives and Target Audience

- Brief Session Description: understanding how to manage COUNTER-compliant usage data in Alma
- Session Goals:
  - By the end of this sessions you will have introductory knowledge on how to:
    - Upload files
    - Monitor “Load Usage Data”
    - Utilize Analytics Usage and Cost Usage reports
- We will cover some recently asked questions

# What is Project Counter?

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

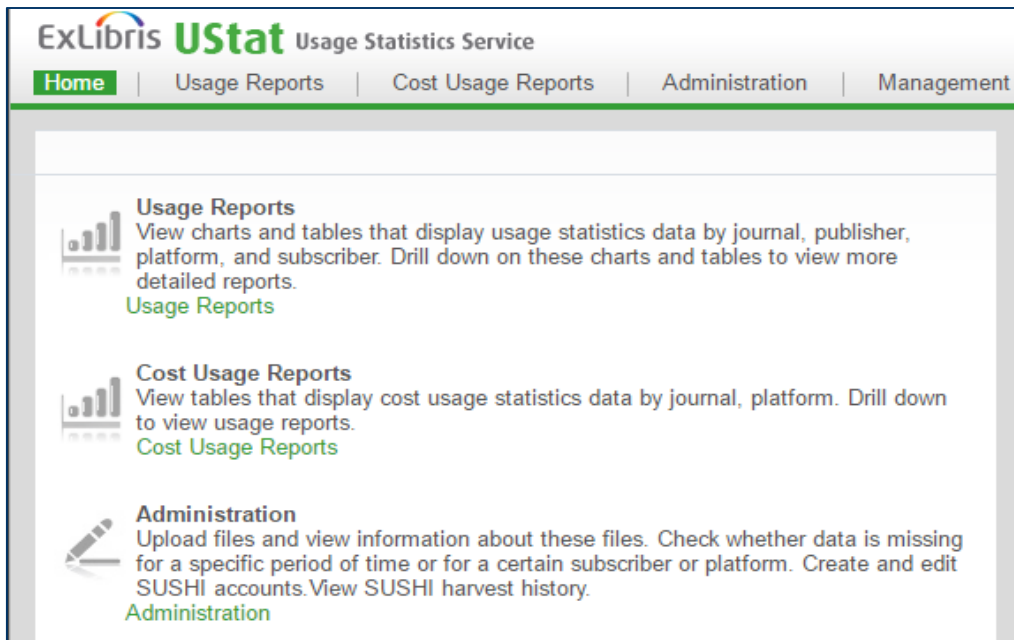
The screenshot shows the Project COUNTER website. At the top left is the COUNTER logo with the tagline "CONSISTENT CREDIBLE COMPARABLE". To the right of the logo is a navigation menu with links: HOME, ABOUT, CODE OF PRACTICE, REGISTRIES OF COMPLIANCE, MEMBERS' SECTION, and CONTACT. In the top right corner, there is a login status "Not logged in. Log in now" and a "Contact COUNTER" link with a Twitter icon.

The main content area features a large heading: "COUNTER provides the standard that enables the knowledge community to count the use of electronic resources." Below this heading is a paragraph: "Known as the Code of Practice, the standard ensures vendors and publishers can provide their library customers with consistent, credible and comparable usage data." To the right of the text are several colorful icons representing data visualization: a bar chart, a pie chart, a line graph with a magnifying glass, and a donut chart.

At the bottom of the page is a row of six circular icons with labels: "ABOUT" (information icon), "CODE OF PRACTICE" (document icon), "REGISTRY" (checklist icon), "MEMBERS SECTION" (people icon), "GUIDES" (book icon), and "JOIN" (person with plus icon).

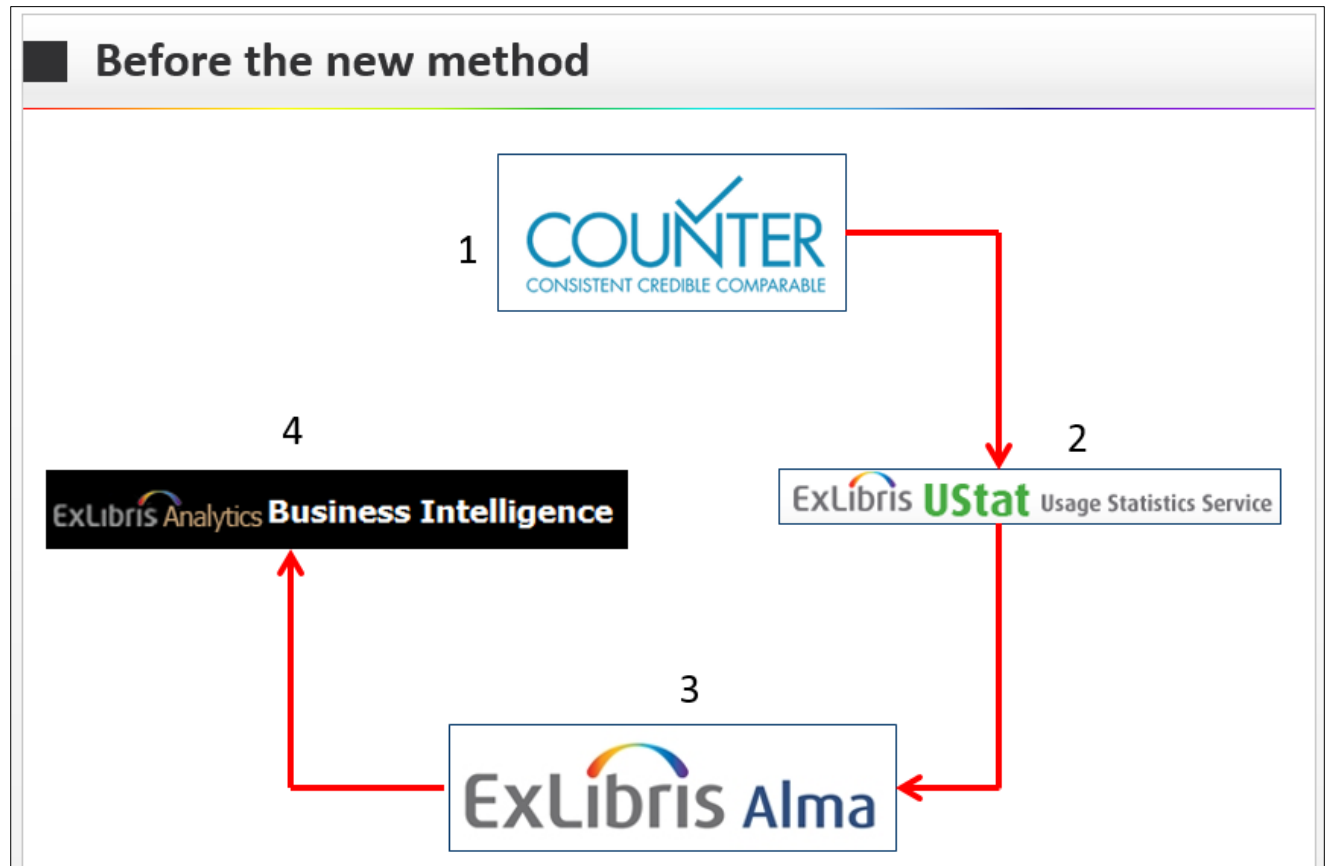


## Transition from UStat to COUNTER data management in Alma



## 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



# 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

## 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.



## 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



# Vendor Configuration


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

The screenshot displays the 'Vendor Details' page for 'Oxford Reference' (Vendor code: OXFORDREF). The 'Usage Data' tab is selected and highlighted with a purple box. Below the tabs, there is a 'SUSHI Accounts' section with a 'SUSHI Vendor' checkbox. The 'Uploaded Files' section features a 'Quick Add' button and an 'Upload File' form. The form includes a file input field, a 'Subscriber' dropdown menu set to 'Integration' (circled in purple), and an 'Upload File' button. At the bottom, there is a filter bar with search fields for 'Status', 'Subscriber', 'Upload Date', and 'Report Type'. The footer of the interface shows a table header with columns: 'File Name', 'Upload Date', 'Uploading User', and 'Subscriber'.


# Vendor Configuration

- 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

1

2

3

▶

	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

# Vendor Configuration

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

The screenshot displays the Alma Vendor Details interface. At the top, the header includes the Alma logo, a user profile icon, and navigation links for Tasks, Analytics, and a status indicator 'Currently at: Cataloging and Acquisition'. The main section is titled 'Vendor Details' and shows the 'Vendor name' as 'ya\_Stein' and the 'Vendor code' as 'YA\_STEIN'. Below this, a row of tabs includes Summary, Contact Information, Contact People, EDI Information, Usage Data, Invoices, and PO. The 'SUSHI Accounts' section is active, showing a 'SUSHI Vendor' checkbox, which is highlighted with a purple rectangle. Below this is the 'Uploaded Files' section, featuring a 'Quick Add' button and a form with 'Upload File' and 'Subscriber' fields, along with an 'Upload File' button. At the bottom, there are filters for Status, All Files, Subscriber, All, Upload Date, All Uploaded, Report Type, and All. The message 'No records were found.' is displayed at the bottom of the page.

## 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/>



# Vendor Configuration

- 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	
<b>Account Identifier</b>			
SUSHI Account *		American Chemical Society	
Vendor URL		<input type="text" value="http://pubs.acs.org/api/soap/analytics/SushiServi"/>	
Status		Active	
Subscriber *		<input type="text" value="C..."/>	
<b>Request Details</b>			
Requester ID	<input type="text" value="AdminACS"/>	Requester Name	<input type="text" value="AdminACS"/>
Customer ID	<input type="text" value="12345678"/>	Customer Name	<input type="text" value="American Chemical Society"/>
User Name	<input type="text" value="AdminACS"/>	Password	<input type="password" value="*****"/>
Report Type	<input type="text" value="JR1"/>	Counter Release	<input type="text" value="R4"/>
Requester Email	<input type="text" value="jerry@mines.edu"/>		

[Cancel](#)

**Save**

**Test Connection with Response**

**Test Connection**

# 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

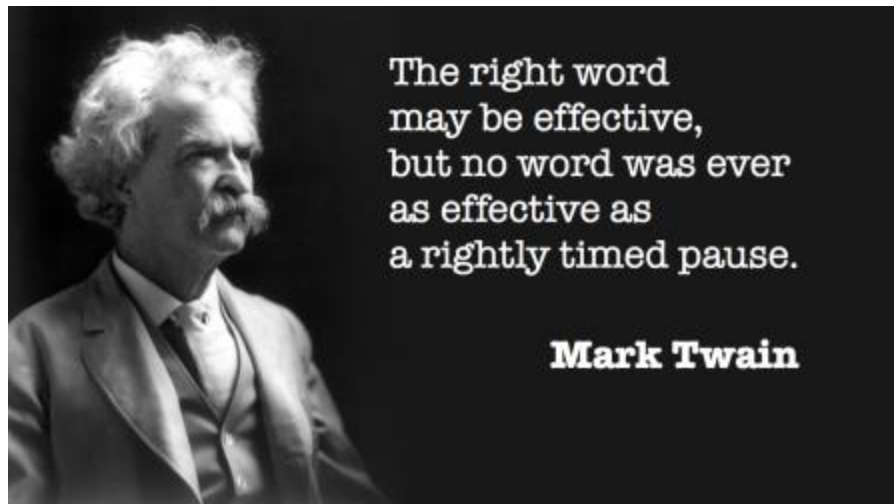
PO Line one time limit \* 100

Package PO Line by Fund ☐

— SUSHI harvesting job

Status ☐ Active ☒ Inactive SUSHI harvesting job schedule Every Saturday

Run Now Email Notification







## Manually Uploading Files

# Manually Loading Files



- 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  Subscriber  Upload Date  Report Type  Vendor

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	-

# Manually Loading Files

- Filters and Action options exist:

The screenshot displays the 'Usage Data Loader' application. At the top, there are tabs for 'Uploaded Files' and 'Missing Data'. Below these is a 'Quick Add' section with input fields for 'Vendor\*' (empty), 'Subscriber\*' (set to 'Colorado School of Mines'), and 'Upload File'. A filter bar contains dropdowns for 'Status' (All Files), 'Subscriber' (All), 'Upload Date' (All Uploaded), 'Report Type' (All), and 'Vendor'. A table lists uploaded files with columns: File Name, Vendor, Upload Date, Upload Time, and Subscriber. The table contains three entries for 'Sushi\_American Mathematical Society\_DB1\_201703\_316...'. A dropdown menu is open for the 'Report Type' filter, showing options: All, PR1, JR1a, BR2, DB1, and JR1. An inset shows the 'Tools' menu with options: View, Download, Delete, and Actions.

File Name	Vendor	Upload Date	Upload Time	Subscriber
1 Sushi_American Mathematical Society_DB1_201703_316...	-	08 Apr 2017	10:39:27	Sushi Scheduler
2 Sushi_American Mathematical Society_DB1_201702_316...	-	08 Apr 2017	10:39:27	Sushi Scheduler
3 Sushi_American Mathematical Society_DB1_201701_316...	-	08 Apr 2017	10:39:27	Sushi Scheduler

- A file can be deleted, downloaded...

# Manually Loading Files

- A favorite: the “Missing Data” tab:

Missing Data								
Uploaded Files		Missing Data						
Year	2017	Measured By	All					
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)





# 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:

Enabled	Display	Order	Code	Description	Translation
1			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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ExLibris

# Subscribers - setup

- Subscriber information is part of the SUSHI account

SUSHI Account Details	
Vendor name	De Gruyter
Vendor code	GRUYTER
<b>Account Identifier</b>	
SUSHI Account *	Walter de Gruyter Reference Global Journals
Vendor URL	<a href="https://ams.degruyter.com/1/services/SushiService">https://ams.degruyter.com/1/services/SushiService</a>
Status	Active
Subscriber *	Integration
<b>Test Details</b>	
Requester ID	44435
Customer ID	2988
User Name	hel...@k...e
Report Type	JR1
Requester Email	h...@k...e
Requester Name	h...@k...e
Customer Name	K...@k...e
Password	.....
Counter Release	R4

# Subscribers - setup

- Subscriber can be used when filtering

ExLibris Alma

Tasks Analytics Currently at: Main Library - Default Circ...

### Usage Data Loader

Uploaded Files Missing Data

**Quick Add**

Vendor\*

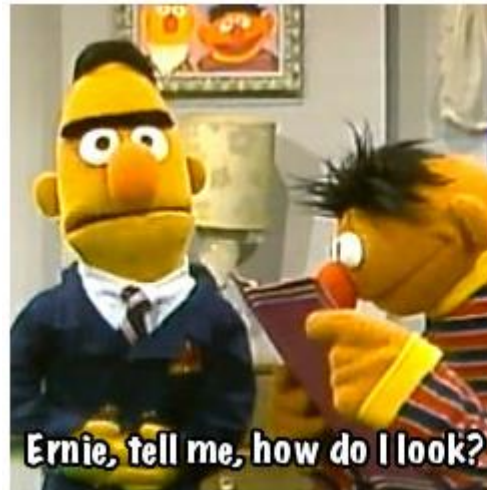
**Subscriber\***

Upload File

Status

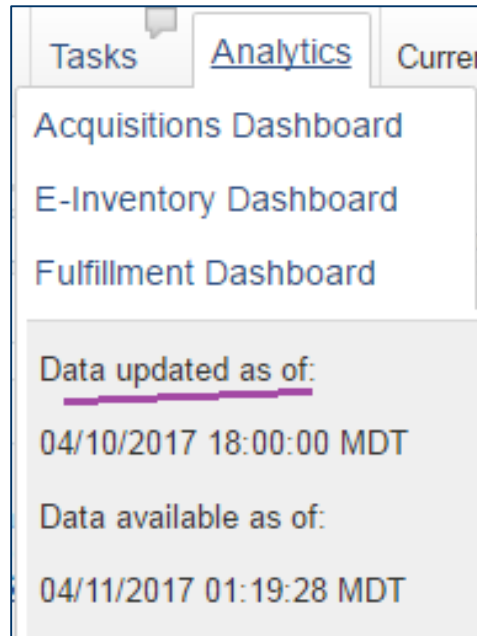
File Name	Vendor	Upload Date	Uploading User	Subscriber	Status
Sushi_Walter de Gruyter Reference Global Journals ...	De Gruyter	06 Apr 2017 06:57:58	Sushi Scheduler	Integration	Fully pro

## Reporting



# Analytics refresh (ETL) happens daily

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



# Usage information in Alma

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

Find  where  contains

1	<a href="#">Nature biotechnology.</a> Gale Cengage Business Collection (Gale Cengage Business Collection): getFullTxt Available from 2000. Most recent 1 year(s) not available. <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	<a href="#">Nature biotechnology.</a> Gale Cengage Health Reference Center Academic: getFullTxt Available from 2000. Most recent 1 year(s) not available. <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	<a href="#">Nature biotechnology.</a> Gale Cengage Expanded Academic ASAP: getFullTxt Available from 2000. Most recent 1 year(s) not available. <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	<a href="#">Nature biotechnology.</a> Gale Cengage Academic OneFile: getFullTxt Available from 2000. Most recent 1 year(s) not available. <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	
Related Records	0
Orders	0
Licenses	0
Courses	0
Combined Usage (last 12 months)	<u>133</u>

# Usage information in Alma

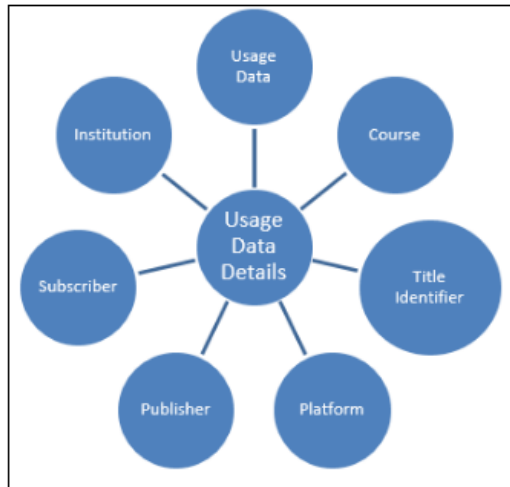
- Expand and begin to analyze:





# Analytics Reporting

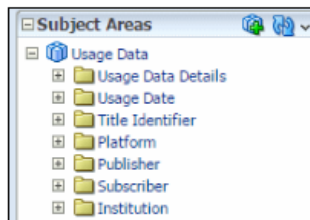
- COUNTER data exists in Analytics “Usage Data” and “Cost Usage” subject areas.



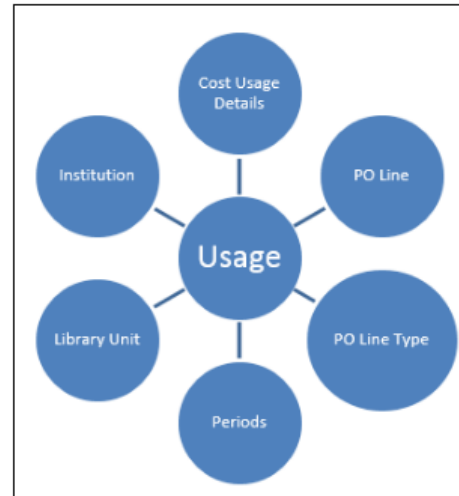
Star Diagram – Usage Data

## Field Descriptions

The following lists the fields available in Usage Data.



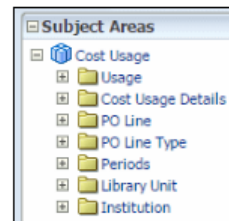
Usage Data – Field Descriptions



Star Diagram – Cost Usage

## Field Descriptions

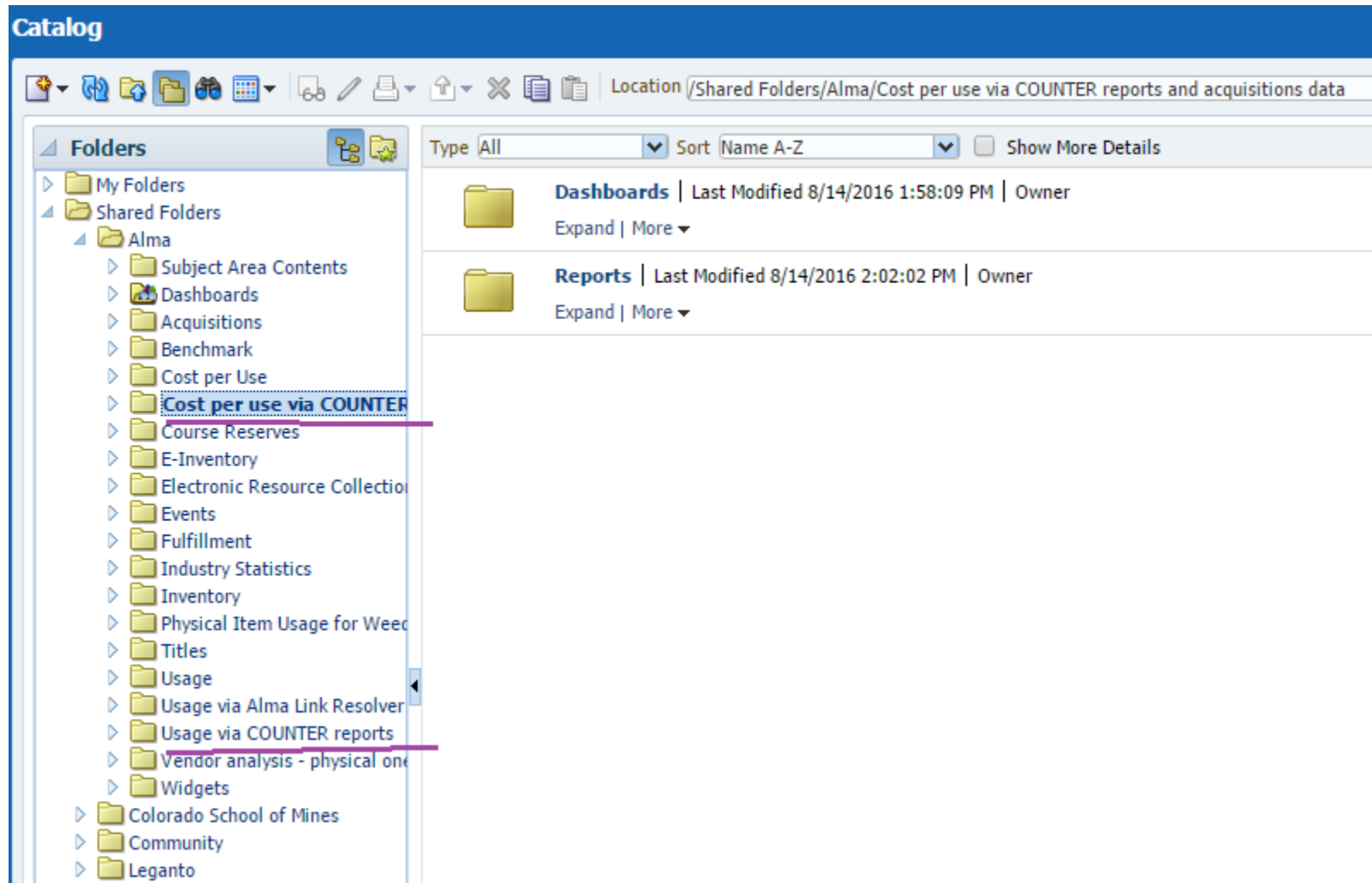
The following lists the fields available in Cost Usage.



Cost Usage

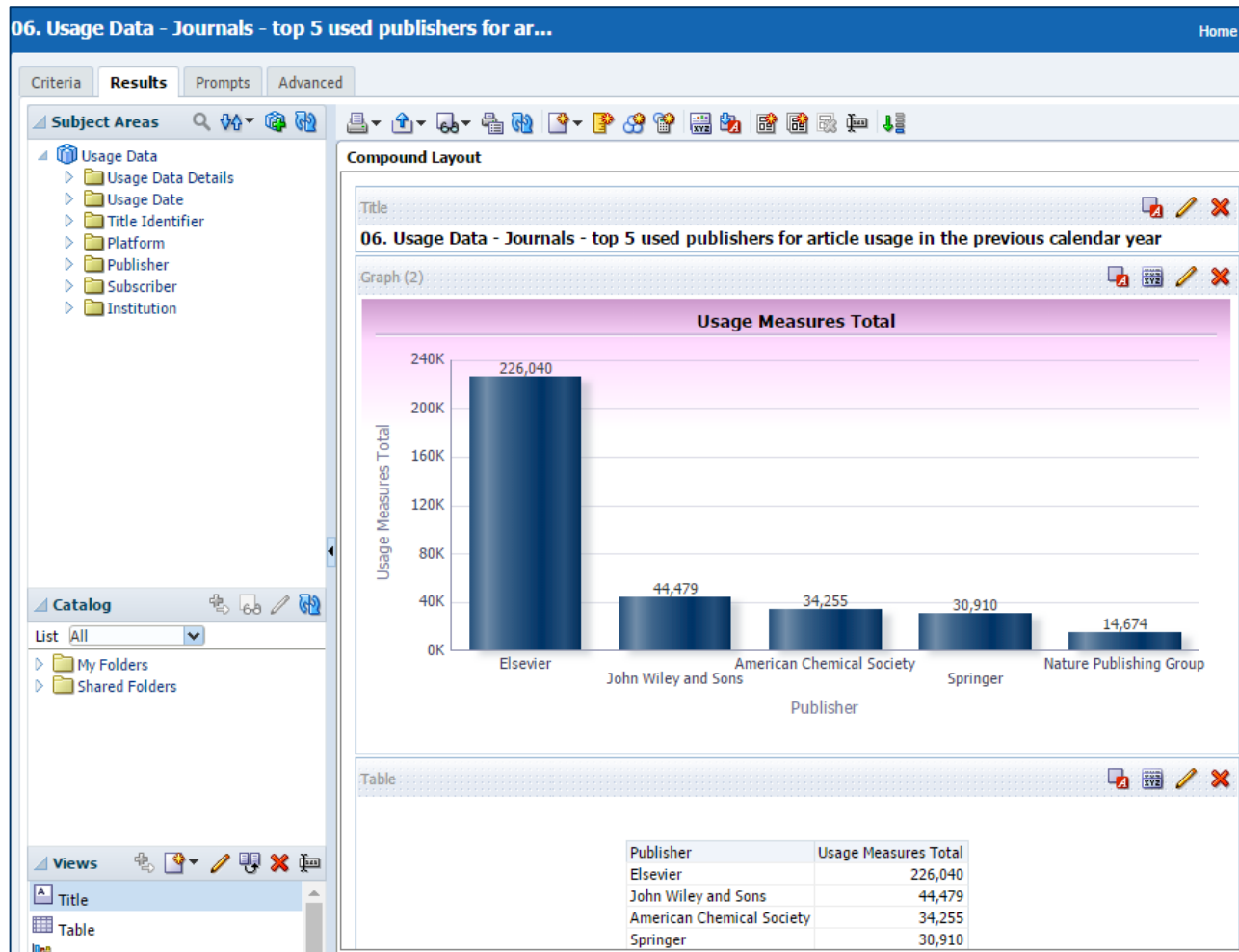
# Analytics Reporting

- Reports and Dashboards are already offered for immediate use:



# Analytics Reporting

- Out of the box report:



# 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/lsr.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)



## Some Recent Conversations

Don't have the access you expect? *Check your user roles.*

Data not loading properly? *Check to see if it is under a different platform name--not a vendor name.*

How can we see what was brought over from USTAT? *Analytics.*

If we have a resource through an expensive package and a free package, how does this display in counter reports? *Alma uses the PO line to pull financials. It matches on ISSN.*





## Questions?

*Please join us at ALA Annual for What Your Library Data ISN'T Telling You: New Features in Library Services Platform Analytics !!*





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