Managing COUNTER-Compliant Usage Data

Alma can collect and report on electronic resource usage statistics information supplied by content providers in COUNTER format. With access to these reports, librarians have more options for analyzing and understanding usage within their institutions. COUNTER reports may be presented in a variety of formats in Alma Analytics, as well as in specific cases in the Alma user interface.

COUNTER (Counting Online Usage of NeTworked Electronic Resources) compliant usage statistics is explained here: https://www.projectcounter.org/.

Many vendors can provide COUNTER statistics for your institution's usage in the form of COUNTER reports. These COUNTER reports can be loaded into Alma in one of two ways:

1. Manually Uploaded
2. Automatically Uploaded (Harvested) via the SUSHI protocol (Standardized Usage Statistics Harvesting Initiative)

Note that the ability to use the SUSHI protocol is dependent on the vendor's compliance with this protocol.

For SUSHI vendors lists for R5 and R4, see the SUSHI Vendors List.

COUNTER R5 Report Types

COUNTER usage data is provided in many different prepackaged types (reports). As of January 2020, Alma is fully compliant with COUNTER release 5. In the description, platform refers to the vendor interface. In release 5, all SUSHI reports are returned in JSON format.

For more information, see here.

Note

In the table below, report types marked with an (*) will be supported in future releases.

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Report Name</th>
<th>Description</th>
<th>Manual Upload (xlsx, xls, csv, tsv, ssv, txt formats)</th>
<th>SUSHI Harvest or Manual Upload (JSON format)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BTR1</td>
<td>Book Title Report 1</td>
<td>Reports on key Request metrics needed to evaluate the effectiveness of a given book.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>*BTR2</td>
<td>Book Title Report 2</td>
<td>Reports on Access Denied activity for books where users were</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Report Type</td>
<td>Report Name</td>
<td>Description</td>
<td>Manual Upload (xlsx, xls, csv, tsv, ssv, txt formats)</td>
<td>SUSHI Harvest or Manual Upload (JSON format)</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------</td>
<td>--------------------------------------------</td>
</tr>
<tr>
<td>DR</td>
<td>Database Master Report</td>
<td>A customizable report detailing activity by database that allows the user to apply filters and select other configuration options.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>DR_D1</td>
<td>Database Search and Item Usage</td>
<td>Reports on key Searches, Investigations and Requests metrics needed to evaluate a database.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>DR_D2</td>
<td>Database Access Denied</td>
<td>Reports on Access Denied activity for databases where users were denied access because simultaneous-use licenses were exceeded or their institution did not have a licence for the database.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>*DR1</td>
<td>Database Report 1</td>
<td>Reports on key Search and Request metrics needed to evaluate the effectiveness of a database or collection.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>*DR2</td>
<td>Database Report 2</td>
<td>Reports on Access Denied activity for databases where users were denied access because simultaneous-use licenses were exceeded or their institution did not have a licence for the database.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>*DRx</td>
<td>Expanded Database Report</td>
<td>Flexible and detailed reporting on metrics captured and summarized at the database/collection level.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>IR</td>
<td>Extended Item Report</td>
<td>A granular, customizable report showing activity at the level of the item (article, chapter, media object, etc.) that allows the user who accesses the online resource to apply filters and select other configuration options.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>IR_A1</td>
<td>Journal Article Requests</td>
<td>Reports on journal article requests at the article level. This report is limited to content with a Data_Type of Article, Parent_Data_Type of Journal, and Metric_Types of Total_Item_Requests and Unique_Item_Requests.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>IR_M1</td>
<td>Multimedia Item Requests</td>
<td>Reports on multimedia requests at the item level.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>*JTR1</td>
<td>Journal Title Report 1</td>
<td>Reports on key Request metrics needed to evaluate the effectiveness of a given journal.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>*JTR2</td>
<td>Journal Title Report 2</td>
<td>Reports on Access Denied activity for journal articles where users were denied access because simultaneous-use licences were exceeded or their institution did not have a licence for the journal.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>*PDAR1</td>
<td>Provider Discovery Article Report 1</td>
<td>Reports on requests and investigation activity by article and customer.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>*PDDR1</td>
<td>Provider Discovery Database Report 1</td>
<td>Reports on requests and investigation activity by database and customer.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>*PDTR1</td>
<td>Provider Discovery Title Report 1</td>
<td>Reports on requests and investigation activity by title and customer.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>PR</td>
<td>Platform Master Report</td>
<td>A customizable report summarizing activity across a content provider’s platforms that allows the user to apply filters and select other configuration options.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>PR_P1</td>
<td>Platform Usage</td>
<td>Platform-level usage summarized by Metric_Type.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Report Type</td>
<td>Report Name</td>
<td>Description</td>
<td>Manual Upload (xlsx, xls, csv, tsv, ssv, txt formats)</td>
<td>SUSHI Harvest or Manual Upload (JSON format)</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>-------------</td>
<td>------------------------------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td><strong>PR1</strong></td>
<td>Platform Report 1</td>
<td>Provides summary usage of the most common metric types for searches, requests and access denied.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td><strong>PRx</strong></td>
<td>Expanded Platform Report</td>
<td>Flexible and detailed reporting on metrics captured and summarized at the platform level.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>TR</td>
<td>Title Master Report</td>
<td>A customizable report detailing activity at the title level (journal, book, etc.) that allows the user to apply filters and select other configuration options.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>TR_B1</td>
<td>Book Requests (Excluding OA_Gold)</td>
<td>Reports on full-text activity for books, excluding Gold Open Access content, as Total_Item_Requests and Unique_Title_Requests. The Unique_Title_Requests provides comparable usage across book platforms. The Total_Item_Requests shows overall activity; however, numbers between sites will vary significantly based on how the content is delivered (e.g. delivered as a complete book or by chapter).</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>TR_B2</td>
<td>Book Access Denied</td>
<td>Reports on Access Denied activity for books where users were denied access because simultaneous-use licenses were exceeded or their institution did not have a license for the book.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>TR_B3</td>
<td>Book Usage by Access Type</td>
<td>Reports on book usage showing all applicable Metric_Types broken down by Access_Type.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td><em>TRe</em></td>
<td>Expanded Title Report</td>
<td>Flexible and detailed reporting on metrics captured and summarized at the title level.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>TR_J1</td>
<td>Journal Requests (Excluding OA_Gold)</td>
<td>Reports on usage of journal content, excluding Gold Open Access content, as Total_Item_Requests and Unique_Item_Requests. The Unique_Item_Requests provides comparable usage across journal platforms by reducing the inflationary effect that occurs when an HTML full text automatically displays and the user then accesses the PDF version. The Total_Item_Requests shows overall activity.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>TR_J2</td>
<td>Journal Access Denied</td>
<td>Reports on Access Denied activity for journal content where users were denied access because simultaneous-use licenses were exceeded or their institution did not have a license for the title.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>TR_J3</td>
<td>Journal Usage by Access Type</td>
<td>Reports on usage of journal content for all Metric_Types broken down by Access_Type.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>TR_J4</td>
<td>Journal Requests by YOP (Excluding OA_Gold)</td>
<td>Breaks down the usage of journal content, excluding Gold Open Access content, by year of publication (YOP), providing counts for the Metric_Types Total_Item_Requests and Unique_Item_Requests. Provides the details necessary to analyze usage of content in backfiles or covered by perpetual access agreement. Note that COUNTER reports do not provide access model or perpetual access rights details.</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>

**COUNTER R4 Report Types**

COUNTER usage data is provided in many different prepackaged types (reports). Alma supports the following types (as of May 2017), depending on the COUNTER release version and method of entering the data. In the description, platform
refers to the vendor interface.

### Supported COUNTER Report Types

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Description</th>
<th>COUNTER Release</th>
<th>Manual Upload (xlsx, xis, csv, txt, tsv formats)</th>
<th>SUSHI Harvest or Manual Upload (xml format)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BR1</td>
<td>Book Report: Successful Title Requests by Month and Title</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>BR2</td>
<td>Book Report: Successful Section Requests by Month and Title</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>BR3</td>
<td>Book Report: Access Denied to Content Items by Month, Title, and Category</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>BR4</td>
<td>Book Report: Access Denied to Content Items by Month, Platform, and Category</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>BR5</td>
<td>Book Report: Total searches by Month and Title</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>CR1</td>
<td>Consortial Report</td>
<td>R4</td>
<td>Not supported</td>
<td>Not supported</td>
</tr>
<tr>
<td>DB1</td>
<td>Database Report: Searches, Result Clicks, and Record Views by Month and Platform</td>
<td>R3/R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>DB2</td>
<td>Database Report: Access Denied by Month, Database, and Category</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>JR1</td>
<td>Journal Report: Successful Full-Text Article Requests by Month and Journal</td>
<td>R4/R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>JR1 GOA</td>
<td>Journal Report: Successful Gold Open Access Full-Text Article Requests by Month and Journal</td>
<td>R4--------------</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>JR1a</td>
<td>Journal Report: Successful Full-Time Article Requests from an Archive by Month and Journal</td>
<td>R3/R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>JR2</td>
<td>Journal Report: Access Denied to Full-Text Articles by Month, Journal, and Category</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>JR5</td>
<td>Journal Report: Successful Full-Text Article Requests by Year-of-Publication (YOP) and Journal</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>MR1</td>
<td>Multimedia Report: Successful Full Multimedia Content Unit Requests by Month and Collection</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>PR1</td>
<td>Total searches, result selects, and record views by Month and Platform (previously DB3)</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>

### User Roles Summary

Users with the following roles can perform tasks related 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 or delete data for any vendor, manage the uploaded data files, and view missing COUNTER data.

• **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.

---

**Configuring COUNTER Subscribers**

To configure COUNTER subscribers, you must have the following role:

• **Acquisitions Administrator**

In nearly all cases, an institution has one *subscriber* which is the name of the institution. In these cases, there is no need to coordinate anything with the vendor regarding your institution’s subscriber name.

In rare cases, an institution has multiple subscribers. This is used as an additional means of filtering data in Alma Analytics. To effectively use multiple subscribers, your institution must coordinate with the COUNTER vendors to send separate reports for each campus, according to the IP address ranges of the campus that accessed each electronic resource. In these cases, your institution adds multiple subscribers to Alma and uploads each report using the relevant subscriber.

Alma requires you to define at least one subscriber. This documentation assumes that you define only one subscriber.

---

**Note**

When you manually upload a data file, the file is considered new data if several key fields are different (vendor, dates, etc), including subscriber. Uploading the same data file a second time overwrites the data from the first upload. If you change the subscriber in the data to a different, valid subscriber, the data is uploaded as new data.

---

You configure subscribers on the Subscribers code table ([Configuration Menu > Acquisitions > General > Subscribers](#)). For more information about code tables, see [Code Tables](#). As noted above, you must configure at least one subscriber.

---

**Managing SUSHI Accounts**

To configure SUSHI accounts, you must have the following role:

• **Vendor Manager**

SUSHI accounts enable Alma to automatically retrieve COUNTER reports from vendors. You create a SUSHI account for each vendor and for each report type; a single vendor may require multiple SUSHI accounts, one for each report type. For an R5 SUSHI account, you can create a single account for all of the necessary report types.

For information on how to define a COUNTER R5 SUSHI Account for ProQuest, ProQuest Ebook Central and Alexander Street Press in Alma, click [here](#).

For the list of SUSHI-certified vendors for Release 5, see the [SUSHI Vendors List](#).

For the list of SUSHI-certified vendors for Release 4, see the [SUSHI Vendors List](#).

---

**Note**

You do not have to create a SUSHI account to retrieve COUNTER data from a a vendor. Whether or not you configure a SUSHI account for a vendor, a vendor can provide you COUNTER data by some other means for you to upload.
You manage SUSHI accounts on the Usage Data tab of the Vendor Details page (Acquisitions > Acquisitions Infrastructure > Vendors, select Edit in the row actions list for the vendor and select the Usage Data tab).

In the Uploaded Files section, the Report Success Rate column indicates the global success rate of the report type for that period, defined as the number of successes divided by the number of failures for the contributed accounts IDs. The statistics are calculated from two months prior to the current month and are updated roughly two days after the SUSHI report is run. The number links to the relevant SUSHI Account Details page.

To add a SUSHI account:

1. Ensure that a subscriber was defined for your institution. See Configuring COUNTER Subscribers.
2. Select Add SUSHI Account.
3. If Release 5 is enabled, select either Release 4 or Release 5. The SUSHI Account Details page appears.
4. Enter the vendor name in **SUSHI Account**. If you have selected release 5, only release 5 vendors appear in the drop-down list.

After you enter three letters in this field, a drop-down list of SUSHI-certified vendors appears (this list is predefined by Ex Libris; see the [SUSHI Vendors List](#)). If you select any of the vendors from this list, **Vendor URL** is prefilled with the correct URL for the vendor (other information may also be prefilled). However, you do not have to select a predefined certified vendor; you can enter any value you like.

---

**Note**

Vendor names cannot contain a '/' (slash).

---

A quick pick list option is available to search the vendors.

Watch the [Add SUSHI Account to Vendor via Search](#) video (1:34 min).

5. If you have not selected a vendor from the list, enter the URL in **Vendor URL** and select a subscriber in **Subscriber**. If needed, enter a URL in **Override URL**. Either the Override URL or the Vendor URL must be populated. If the Vendor URL for a SUSHI account changes in the list of SUSHI-certified vendors, the Vendor URL is updated. The Override URL is not changed by the update. When both the "Vendor URL" and "Override URL" fields are filled in Alma first attempts to connect via the "Override URL".

6. Enter contact information in **Contact Information**. Typically, this will be a URL or email account of the vendor.

7. Enter the required credentials in the **Request Details** area. Some information may already be prefilled; your vendor will supply you with the required information for this area. The vendor must supply the information and credentials for the **API Key** field. For information on special cases, see the [SUSHI Vendors List](#).

8. For Release 4 accounts, select the **Report Type**. For Release 5 The Accounts, select **Add Report Type** for each of the report types needed on this account.

9. To test the connection, select **Test Connection**. For Release 4 accounts, if there is an error, an error message appears at the top of the page. Select **Test Connection with Response** to view a Zip file containing both the SUSHI request and response packages (in XML) sent to/from the vendor. These packages may help you debug the connection. For Release 5 accounts, a JSON file is displayed with the connection status, and any errors, if applicable. You should also select **Test Connection with Response** for each report type from its respective row action menu to detect any further possible errors.

10. Select **Contribute** to contribute a SUSHI account to the Community Zone.

11. When you are done, select **Save**. The account is saved and appears in the **Usage Data** tab.

You can delete the account by selecting **Actions > Delete** in the account row on the **Usage Data** tab.

On the Search Vendors page (**Acquisitions > Acquisitions Infrastructure > Vendors**), you can filter the table to display
only SUSHI-enabled vendors by selecting SUSHI Vendor in the Vendor Type filter. Note that a vendor may be SUSHI-enabled even if it does not have a SUSHI account.

Managing SUSHI Harvesting

To manage the SUSHI harvesting job, you must have one of the following roles (see below for details):

- Acquisitions Administrator
- Vendor Manager
- General System Administrator

By default, the SUSHI harvesting job harvests all COUNTER data from all active SUSHI accounts. The job runs some time between Friday evening and Saturday morning, depending on your time zone. Before uploading, Alma checks whether overlapping data exists in the database, according to a unique combination of owner code (constructed from the customer ID and institution ID), subscriber, platform, publisher, measure type, and date. When the job receives a response that indicates that the report will be available at a later time, Alma automatically retries to collect a report a random amount of time later. If the error persists, a number of such iterations are attempted, increasing the retry interval each time, until the attempt reaches a maximum number of retries.

During the automatic SUSHI process, the last 12 months are harvested. If you wish to harvest older files, you need to contact your vendor to request that files be sent to you that you can manually harvest to Alma.

**Known Issue!**

For COUNTER 5, if one specific month returns an error when harvesting data, that same error will be shown for all months of that same report, even if the other months harvested successfully and have usage.

The actions you can perform depend on your role.

- As an Acquisitions Administrator, you can activate, deactivate, or schedule this job, or run it manually.
- As a Vendor Manager, you can run the job manually for a single vendor account and view a history of how often this was performed.
- As a General System Administrator, you 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. For more information, see Viewing Scheduled Jobs, Viewing Running Jobs, Viewing Completed Jobs.

**Note**

- PR1 reports should have the following data in cells 1B and 1C:
  - Cell 1B - Total Searches, Result Clicks and Record Views by Month and Platform
  - Cell 1C - empty

In some cases, vendors have sent PR1 reports with the following (incorrect) data in cells 1B and 1C:
To manage the SUSHI Harvesting job as an Acquisitions Administrator or General System Administrator:

On the Acquisitions Jobs Configuration Page (Configuration Menu > Acquisitions > General > Acquisition Jobs Configuration), perform one of the following actions in the SUSHI Harvesting Job area:

- To deactivate the SUSHI harvesting job, select Inactive or select Not scheduled for SUSHI harvesting job schedule.
- To activate the SUSHI harvesting job, select Active and select a valid scheduling option in SUSHI harvesting job (options exist for weekly or monthly job runs).
- To run the job immediately, select Run Now.

To manage the SUSHI Harvesting job as a Vendor Manager:

On the Usage Data tab of the Vendor Details page (Acquisitions > Acquisitions Infrastructure > Vendors, select Edit in the row actions list for the vendor and select the Usage Data tab), perform one of the following actions:

- To run the job immediately for a vendor account, select Harvest Now in the row actions list and select Confirm in the confirmation dialog box. For Release 5 accounts, you can also edit the SUSHI account, and harvest each report type separately.
- To manage reports received from the vendor, select View, Download, or Delete from the row actions list.
- To view a history of these account-specific job runs, select View History in the row actions list. The SUSHI Harvest History page appears.

Select File Details in the row actions list to see the report or response from the vendor. You can download the file by selecting Download. You can download the file even if it was deleted (on the Usage Data tab of the Vendor Details page or the Uploaded Files tab of the Usage Data Loader page).

Custom SUSHI Harvest

The Custom Harvest option enables users to define a specific time frame while manually harvesting SUSHI data. This is

---

To manage the SUSHI Harvesting job as an Acquisitions Administrator or General System Administrator:

On the Acquisitions Jobs Configuration Page (Configuration Menu > Acquisitions > General > Acquisition Jobs Configuration), perform one of the following actions in the SUSHI Harvesting Job area:

- To deactivate the SUSHI harvesting job, select Inactive or select Not scheduled for SUSHI harvesting job schedule.
- To activate the SUSHI harvesting job, select Active and select a valid scheduling option in SUSHI harvesting job (options exist for weekly or monthly job runs).
- To run the job immediately, select Run Now.

To manage the SUSHI Harvesting job as a Vendor Manager:

On the Usage Data tab of the Vendor Details page (Acquisitions > Acquisitions Infrastructure > Vendors, select Edit in the row actions list for the vendor and select the Usage Data tab), perform one of the following actions:

- To run the job immediately for a vendor account, select Harvest Now in the row actions list and select Confirm in the confirmation dialog box. For Release 5 accounts, you can also edit the SUSHI account, and harvest each report type separately.
- To manage reports received from the vendor, select View, Download, or Delete from the row actions list.
- To view a history of these account-specific job runs, select View History in the row actions list. The SUSHI Harvest History page appears.

Select File Details in the row actions list to see the report or response from the vendor. You can download the file by selecting Download. You can download the file even if it was deleted (on the Usage Data tab of the Vendor Details page or the Uploaded Files tab of the Usage Data Loader page).

Custom SUSHI Harvest

The Custom Harvest option enables users to define a specific time frame while manually harvesting SUSHI data. This is
only available for SUSHI Release 5 accounts. The existing "Harvest Now" function remains and harvests usage from the past 12 months while the new "Custom Harvest" function presents users with a pop-up window allowing them to define the exact time frame for the harvest period. The "Custom Harvest" operation can run on the entire SUSHI account or on a specific report within the account. Users can define multiple harvest time frames.

**Note**

If the selected date range(s) contain months previously uploaded to Alma, these will get overridden.

---

**Harvest Due Date Range**

Watch the [Harvest SUSHI Data from a Specific Time Frame](#) video (1:18 minutes).

---

**Manually Uploading and Deleting COUNTER Data**

To manually upload COUNTER data or manage this data after it was uploaded, you must have one of the following roles (see below for details):

- Usage Data Operator
- Vendor Manager

A vendor can send you COUNTER data to upload manually to Alma. The data that you upload must be in one of the following formats: **xlsx**, **xls**, **csv**, **txt**, or **tsv**. For Release 4 accounts, you can also manually upload data in **xml** format (see [COUNTER Report Types](#)). For release 5, the manual data upload returns reports in **JSON** format.

A Usage Data Operator can upload data for any vendor and manage all uploads on the **Uploaded Files** tab of the Usage Data Loader page (Acquisitions > Import > Load Usage Data).

---

**Usage Data Loader, Uploaded Files Tab**

A Vendor Manager can upload data and manage all uploads for a single vendor at a time on the **Usage Data** tab of the Vendor Details page (Acquisitions > Acquisitions Infrastructure > Vendors, select **Edit** in the row actions list for the vendor and select the **Usage Data** tab).
Before uploading, Alma checks whether overlapping data exists in the database, according to a unique combination of owner code, subscriber, platform, publisher, measure type, and date (the owner code in Alma is built out of the customer ID and the institution ID). If data is considered duplicate, the following notification message is displayed: **Continue with the upload will delete the old data - Are you sure you want to continue?** If you continue, the old data is overwritten by the new data. In the case of a SUSHI harvest (where the data is not uploaded in a manual manner and therefore no message appears to the staff user), the duplicate data is automatically overwritten.

After uploading the data, the operator/manager can perform the following actions:

- View information about the file and the imported data (**View**).
- Download the file (**Download**).
- Delete the file and its imported data (**Delete**).
- Reload the file if it did not run successfully (**Reload**). The action is visible only for Invalid and Partially Loaded SUSHI files.

  Watch the [Reload Usage Data Files That Failed to Load](#) video (1:10 min).

A Usage Data Operator can also delete data according to its file ID on the Delete Usage Data page (**Acquisitions > Import > Delete Usage Data**). This is helpful when usage data was migrated to Alma and appears (with its file ID) in Analytics.

To manually upload COUNTER data:

1. On the **Uploaded Files** tab of the Usage Data Loader page (as a Usage Data Operator), or on the **Usage Data** tab of the Vendor Details page (as a Vendor Manager), select **Upload File** and enter the following.
   - **Vendor** (Usage Data Loader page, only) - The vendor associated with the uploaded data. Note that the vendor does not have to be a SUSHI vendor.
   - **Upload File** - Browse for the file to upload. The file should list counter data from the 10th Excel line onwards.
   - **Subscriber** - Select the subscriber.

2. Select **Upload File**. The file is uploaded and the data imported into Alma. Information about the file, including its status, appears in the table.

**To manually delete COUNTER data according to its file ID:**

On the Delete Usage Data page, enter the file ID and select **Delete File** and select **Confirm** in the confirmation dialog box.

A Delete Usage Data job runs. See [Viewing Completed Jobs](#) for information on monitoring the job and viewing the report.

---

**Note**

See the note about errors in PR1 reports from some vendors in [Managing SUSHI Harvesting](#). If you see this error in a PR1 report, manually correct the report before uploading it.
Viewing Usage Data

To view usage data you must have the following role:

- Usage Data Operator

The Monthly Usage Data tab presents the user with the status of all SUSHI harvesting from the various platforms: successful / completed with errors / failed, in order for the customer to quickly understand the status of the month's harvest.

To view usage data:

- In the Uploaded Files tab, select the desired report and click Download.

For more information, see Usage Data.

You can view COUNTER usage data by subscriber, platform (vendor interface), report type and measurement, and month on the Monthly Usage Data tab of the Usage Data Loader page (Acquisitions > Import > Load Usage Data; select the Monthly Usage Data tab). Contact your vendor for any missing information.

Usage Data Loader, Monthly Usage Data Tab

Select a year or report type and measurement using the filter drop-down lists (Year or Measured By, respectively). Any year for which you have at least some COUNTER data appears in the Year filter.

The columns on this page include:

- Subscriber
- Platform
- Measured By - Report type and measurement. If you do not select anything in the Measured By filter, all report types and measurements appear.
- Jan .. Dec - Only the months of the year selected in the Year filter appear. The green icon ( 

Ex Libris, Part of Clarivate
) indicates that the usage report file was successfully uploaded. The yellow icon ( ) indicates that the connection to the vendor was successful, but the vendor did not send any data. While the red icon ( ) indicates that the vendor connection attempt was unsuccessful.