

20210615 Managing COUNTER-Compliant Usage Data

From Cynthia Scott to Everyone: 10:18 AM

I would like to hear from a library that has initiated ALMA Sushi. How many jobs are completed vs failed on the vendor harvesting?

Jessica Bastian: working through the documentation was successful (to set up SUSHI). have the large vendors set up. Stuck in the Analytics, pulling from Usage Data or E-Inventory, because don't have Acquisitions. Demo: Started with our vendors. Set up SUSHI accounts and then harvested right away to see if it worked. It had worked automatically now. Added reports for ACRL reporting needs. Provides registry URL in json file. Had problems with EBSCO--needed a new Requester ID. Have to ask the vendor for the SUSHI information required. Contacted Newsbank and Gale. Can harvest reports immediately, but need to wait 24 hours for Analytics. Weekly job will run, but can set it up for monthly. Made some of her own reports in Analytics for ACRL. Wants to create a report with prompts for date ranges. Also wants to check out the pre-made reports.

From Ted Schwitzner, CARLI (he/him/his) to Everyone: 10:23 AM

The only vendors that will be present in Alma will be those that migrated from Voyager or that you have created since going live.

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/090Acquisitions_Infrastructure/010Managing_Vendors/Managing_COUNTER-Compliant_Usage_Data](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/090Acquisitions_Infrastructure/010Managing_Vendors/Managing_COUNTER-Compliant_Usage_Data)

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/090Acquisitions_Infrastructure/010Managing_Vendors/SUSHI_Vendor_Lists#SUSHI-Certified_Vendors_Release_5](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/090Acquisitions_Infrastructure/010Managing_Vendors/SUSHI_Vendor_Lists#SUSHI-Certified_Vendors_Release_5)

From Ted Schwitzner, CARLI (he/him/his) to Everyone: 10:34 AM

List of Out of the Box reports in the "Alma" shared folder:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/080Analytics/060Out-of-the-Box-Reports](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/060Out-of-the-Box-Reports)

From Ruth Lindemann to Everyone: 10:35 AM

Ted helped me set up one but I haven't been able to go back to do the rest.

From Cynthia Scott to Everyone: 10:36 AM

I would like to set this all up, just needing time to invest in the process!

From Alice Creason to Everyone: 10:37 AM

We've been using EBSCO usage consolidation for the past few years, but we'd really like to move over to doing this in Alma.

Nicole Ream-Sotomayor: Getting vendor data was a sticking point. Analytics is a sticking point because used to the spreadsheet view. Will be very useful when it is set up. SUSHI feeds would start and then break (a year ago. Hoping that they have gotten more reliable).

From Ted Schwitzner, CARLI (he/him/his) to Everyone: 10:39 AM

Several other institutions and consortia have created ACRL reports. I'm finding them under /Shared Folders/Community/Reports/Institutions or /Shared Folders/Community/Reports/Consortia

Selecting one of those folders and performing a search will get you closer. Be sure to copy to your institution folders before modifying.

From Ted Schwitzner, CARLI (he/him/his) to Everyone: 10:41 AM

We do plan to try to vet some of these reports into a "CARLI" set for easy location at some point.

From Brent Eckert to Everyone: 10:40 AM

Sounds like setting this up is no harder than setting up OpenAthens. That was a lot more time-consuming than advertised in my experience!

Jessica Bastian: working on understanding what the reports mean and how to use them is more difficult than setup.

Lynne Ferrell: confused by json files and how to display.

Nicole R-S: Can open json file in Firefox.

From Gail Heideman to Everyone: 10:42 AM

I think setting up the vendors sounds time consuming, but no more so than gathering that information to have on hand for use in subsequent years.

From Denise Green to Everyone: 10:43 AM

<https://notepad-plus-plus.org/downloads/>

From Jen Masciadrelli, CARLI (she/her) to Everyone: 10:45 AM

Gail: I agree, setting up the vendors is a lot of up front work, but then it is done unless there are changes.

No work every year!

From Lori Thompson to Everyone: 10:47 AM

I wondered if part of the Vendor work could be done by Jobs? For example, Jessica said she updated hers by adding Access provider. If you made a set of those. I haven't tried, just wondered.

From Ted Schwitzner, CARLI (he/him/his) to Everyone: 10:48 AM

No. It's not as simple as switching a toggle. Have to define what the interface is called and some other settings that are unique to that vendor and your institution.

From Gail Heideman to Everyone: 10:49 AM

If we add the Vendor data now, will be be able to go back and get all of FY2021 data for our ACRL reports?

Ted: Yes. if you aren't using Acquisitions data, however, can't get cost per use.

From Jessica Bastian to Everyone: 10:50 AM

Yes, SUSHI pulls in 12 months of data at a time. So if you set it up now you'll get 12 previous months of data.

From Cynthia Scott to Everyone: 10:52 AM

Do we have to reach out to almost every vendor to get the API key or requestor ID etc...

From Jessica Bastian to Everyone: 10:52 AM

Often times, you can find it in you admin portal.

Nicole R-S said that the info on the COUNTER page was fairly accurate as to what settings were needed.

From Gail Heideman to Everyone: 10:55 AM

So, I don't have a ProQuest subscription, but I do buy ebooks from them. How will I know which ProQuest vendor account to use from the community zone?

From Ted Schwitzner, CARLI (he/him/his) to Everyone: 10:55 AM

CARLI's Sushi page is basic right now, but will have more eventually:

<https://www.carli.illinois.edu/products-services/i-share/electronic-res-man/sushi>

From Gail Heideman to Everyone: 10:57 AM

And then will the Carli ProQuest books be a different vendor?

Yes

Nicole R-S: shouldn't make a difference who paid for the books (CARLI or institutions).

From Brent Eckert to Everyone: 10:55 AM

You could manually upload files that are older than 12 months, right? (I think most vendors have COUNTER files going back further than 12 months.)

Nicole R-S: Yes. No problem with uploading files.

COUNTER is a structured report set that supplies usage data for electronic resources. Alma supports both release 4 and 5 of COUNTER. SUSHI provides a way to automatically harvest COUNTER data.

SUSHI accounts are under the Usage Data tab. example: ProQuest. Click add SUSHI account and search the CZ for the URL. uses override URL first then vendor URL. Click the list of SUSHI accounts to get instructions for particular vendors. Fill in Customer ID, user name, and API key. Then click test connection. COUNTER provides a JSON file. Select the report types to harvest. Test connection with response. Example: John Benjamins: needs both requester ID and customer ID and platform.

Q1--counter4 or counter5?

from Jenny Draeger to everyone: 9:07 AM

A1--You'll see the version when you set up the integration.

Q: Can you refine the dates of the reports that you get? No, looks at the last 12 months and takes those that haven't been harvesting.

Q: How do you harvest more than one SUSHI account per vendor? Showed example of one vendor and two accounts.

Q: How to troubleshoot connection errors? Look at the list of vendors and see if you have everything. If so, contact the vendor.

Q2--When was the Platform field was added? (I am wondering if we need to go back to different vendors to add this.) Thanks! A2--The July release of Alma. See the Release Notes.

Acquisitions > Acquisitions Jobs Configuration > SUSHI Harvesting Job to run the harvesting job.

Q3--What reports would you have access to if you are just starting to use SUSHI or COUNTER reports? A4--Whatever the vendor is providing.

Go to the Usage Data tab of a vendor account and see what's been uploaded. You can download the reports.

Q4--Also, there is no batch add or delete option? A4--The benefit of using SUSHI is that it's scheduled. No manual uploads.

Import > Load Usage Data to load all the data being accessed through SUSHI and manual loads.

Q5--What permissions are needed in Alma to be able to see the jobs/configure them? A5--The Vendor Manager role.

View monthly usage data to see what has been harvested. Contact the vendor if something's missing.

Q: What json extension do you use and can you open it in Excel? Json light; don't know if you can open them in Excel.

Q: If you contact the vendor about a missing report, will it be uploaded next time that the job runs? A: yes.

Q: Where do you find the list of what each report type means? A: Project COUNTER.

COUNTER data is available in Analytics in Usage Data and E-Inventory subject area. Usage Data contains all the usage data regardless of whether the resource exists in Alma or not. E-Inventory only contains usage data if the resource exists in Alma. Cost-per-use is in E-Inventory.

Q6--Can we still set up SUSHI reports in Alma if we don't use Acquisitions? A6--You need a vendor record to load Usage Stats so yes. You won't get cost per use data without pricing information that you get from using Analytics.

Q7--Does JSON have to be used? Is there an option to use CSV or tsv? A7--COUNTER determines the communication standard and file types, not Ex Libris.

Analytics > Catalog > ?? (out of the box) > Usage Data Via COUNTER Reports Release 5.

Q8--Where does the cost come from in E-inventory? A8--By using Acquisitions in Alma.

Q9--If we do not use the ACQ module then we won't be able to produce cost/use reports, right? A9--Correct.

<https://developers.exlibrisgroup.com/blog/?tag=cost-per-use>

Monthly usage data available in Analytics (showed dashboard).

Q: Should we delete older usage data in Alma on a regular basis. A: No. Might need it later.

Usage via COUNTER Reports (dashboard): shows trendlines by month. Most used titles. Most used platforms. Most used publishers. usage amounts for all materials types for three calendar years to current date. Reports loaded by year and month.

Q: Will Alma ever be able to deal with non-COUNTER usage data? A: If it's Excel data , you can upload it.

Q10--We could still run general usage reports though, right? It just wouldn't include cost per use? A10--I'd have to test this out. You might have to copy and alter the report in order to get results in the Analysis.

Q11--Has ExLibris created any prefab reports in Analytics that match up with what libraries are asked to report for usage data to ACRL? A2--Search ACRL in Analytics to see all of the ACRL reports available.

E-Inventory subject area > folder for cost usage. Cost per via COUNTER reports e-inventory and acquisitions data . Most used titles. Most expensive. Cost per use. Specific title details.

Q12--Can you compare R4 an R5 reports? A12--<https://www.copyright.com/blog/counter4-vs-counter5/>

Q13--Can you load TR reports? A13--TR Reporty types are supported and can be loaded.

Q14--Is there a way to manually enter usage statistics for physical serials (No barcodes, so no loan data available in ALMA) so that we could calculate cost-per use with our acquisitions data? A14--Not without usage data.