



# Usage Statistics for Electronic Resources: Set Up

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# Things to Consider

- Standards & practices
- Content providers (vendors)
- Alma (your library, Ex Libris)
- Analyses



# Things to Consider

- Standards & practices – COUNTER, SUSHI
- Content providers (vendors) – compliance, availability, tech issues
- Alma (your library, ExLibris) – staff time, new releases
- Analyses – raw usage, cost-per-use

# Resources

**3/25/20 - Advanced ERM: Usage Data, SUSHI, and Licenses**

<https://public.3.basecamp.com/p/YxqBBNcEGAuS1NEui59zc1AS>

**8/18/20 - COUNTER Release 5 Usage Data Harvesting in Alma And Alma Analytics**

[https://knowledge.exlibrisgroup.com/Alma/Training/Ask the Alma Expert/9925 2020-08-18 COUNTER Release 5 Usage Data Harvesting in Alma and Alma Analytics](https://knowledge.exlibrisgroup.com/Alma/Training/Ask%20the%20Alma%20Expert/9925_2020-08-18_COUNTER_Release_5_Usage_Data_Harvesting_in_Alma_and_Alma_Analytics)

**Alma Electronic Resources Management Guide**

<https://slcny.libguides.com/training-eresources>

**COUNTER** - <https://www.projectcounter.org/>

**SUSHI** - <https://www.niso.org/standards-committees/sushi>



# Benefits of Setting up Usage Stats in Alma

- Compare usage across platforms
- Replace Excel tracking sheets
- Storing usage + acquisitions data in the same system allows you to analyze cost per use
- Data exports from Analytics\*\* allow you to graph, chart, etc.

\*\* Discussed in Session 2

# General information

- Content providers make usage reports available, via admin portals, emailed reports, etc.
- Not meant to replace these reports – adds value to the data you get
- Not all providers/platforms supply usage data (though most do)
- Not all providers/platforms enable usage data ingestion options (SUSHI)
- Relies on [COUNTER](#) - compliant usage reports (Counting Online Usage of NeTworked Electronic Resources)
- Requires admin account access for desired content providers

# Required Roles

- 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

[Ex Libris COUNTER Roles Summary](#)



# COUNTER R4 & R5 Support

- With the January 2020 release, Alma is now fully compliant with COUNTER Release 5.
- COUNTER Release 4 is still supported, in Alma, and Alma Analytics. However, providers will likely have switched over to R5.
- For a detailed discussion of R4, please refer to 3/25/20 session, listed in "Resources."
- Ex Libris recommends contacting both them and the vendor if you have any trouble setting up COUNTER R5.

[Alma January 2020 Release Notes - Acquisitions](#)



# COUNTER R5 Report Types

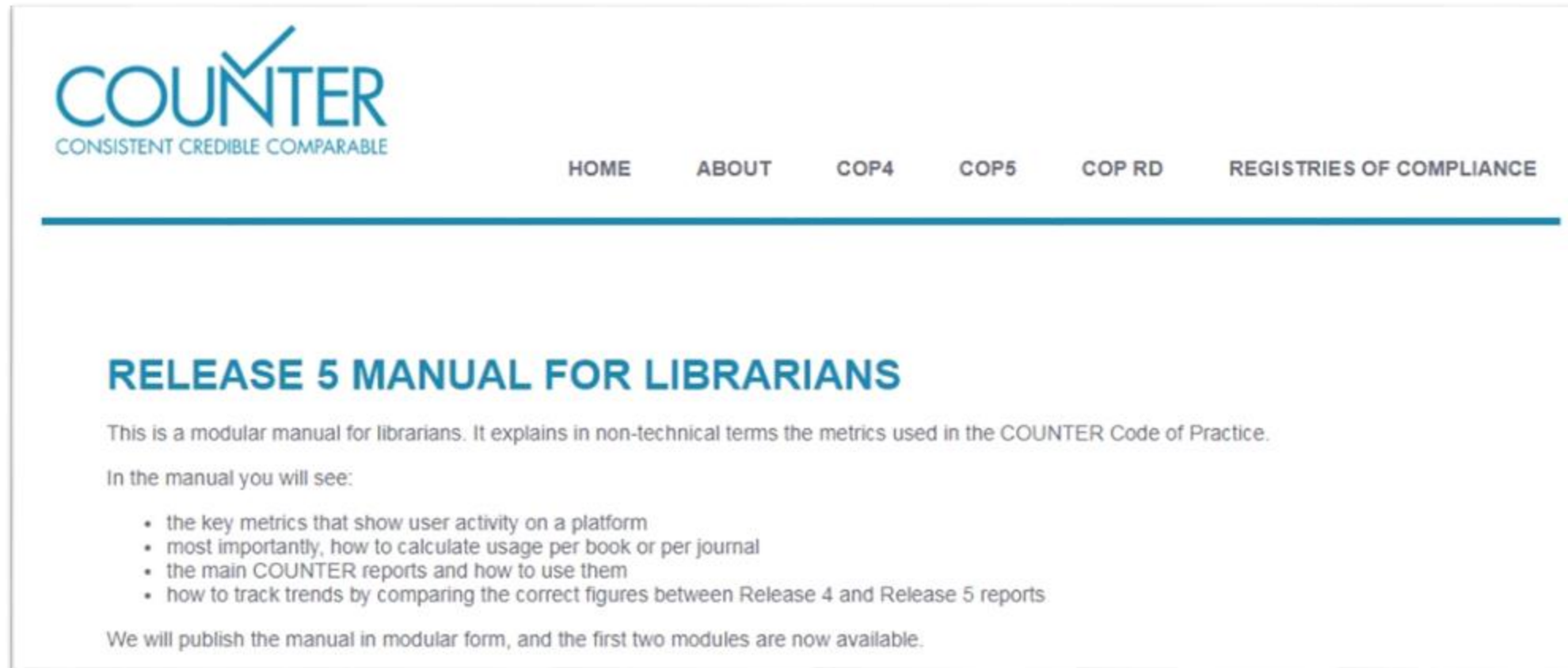
Platform = vendor interface

Report Type ▲▼	Report Name ▲▼	Description ▲▼	Manual Upload (xlsx, xls, csv, tsv, ssv, txt formats) ▲▼	SUSHI Harvest or Manual Upload (JSON format) ▲▼
TR	Title Master Report	A customizable report detailing activity at the title level (journal, book, etc.) that allows the user to apply filters and select other configuration options.	Y	Y
DR	Database Master Report	A customizable report detailing activity by database that allows the user to apply filters and select other configuration options.	Y	Y
PR	Platform Master Report	A customizable report summarizing activity across a content provider's platforms that allows the user to apply filters and select other configuration options.	Y	Y

[Ex Libris Documentation](#)

# COUNTER R5 Report Types

<https://www.projectcounter.org/friendly-guides-release-5/>



The screenshot shows the COUNTER website header with the logo 'COUNTER' and the tagline 'CONSISTENT CREDIBLE COMPARABLE'. The navigation menu includes 'HOME', 'ABOUT', 'COP4', 'COP5', 'COP RD', and 'REGISTRIES OF COMPLIANCE'. The main content area features the title 'RELEASE 5 MANUAL FOR LIBRARIANS' and a description: 'This is a modular manual for librarians. It explains in non-technical terms the metrics used in the COUNTER Code of Practice. In the manual you will see:' followed by a bulleted list of topics. At the bottom of the section, it states: 'We will publish the manual in modular form, and the first two modules are now available.'

**COUNTER**  
CONSISTENT CREDIBLE COMPARABLE

HOME ABOUT COP4 COP5 COP RD REGISTRIES OF COMPLIANCE

## RELEASE 5 MANUAL FOR LIBRARIANS

This is a modular manual for librarians. It explains in non-technical terms the metrics used in the COUNTER Code of Practice.

In the manual you will see:

- the key metrics that show user activity on a platform
- most importantly, how to calculate usage per book or per journal
- the main COUNTER reports and how to use them
- how to track trends by comparing the correct figures between Release 4 and Release 5 reports

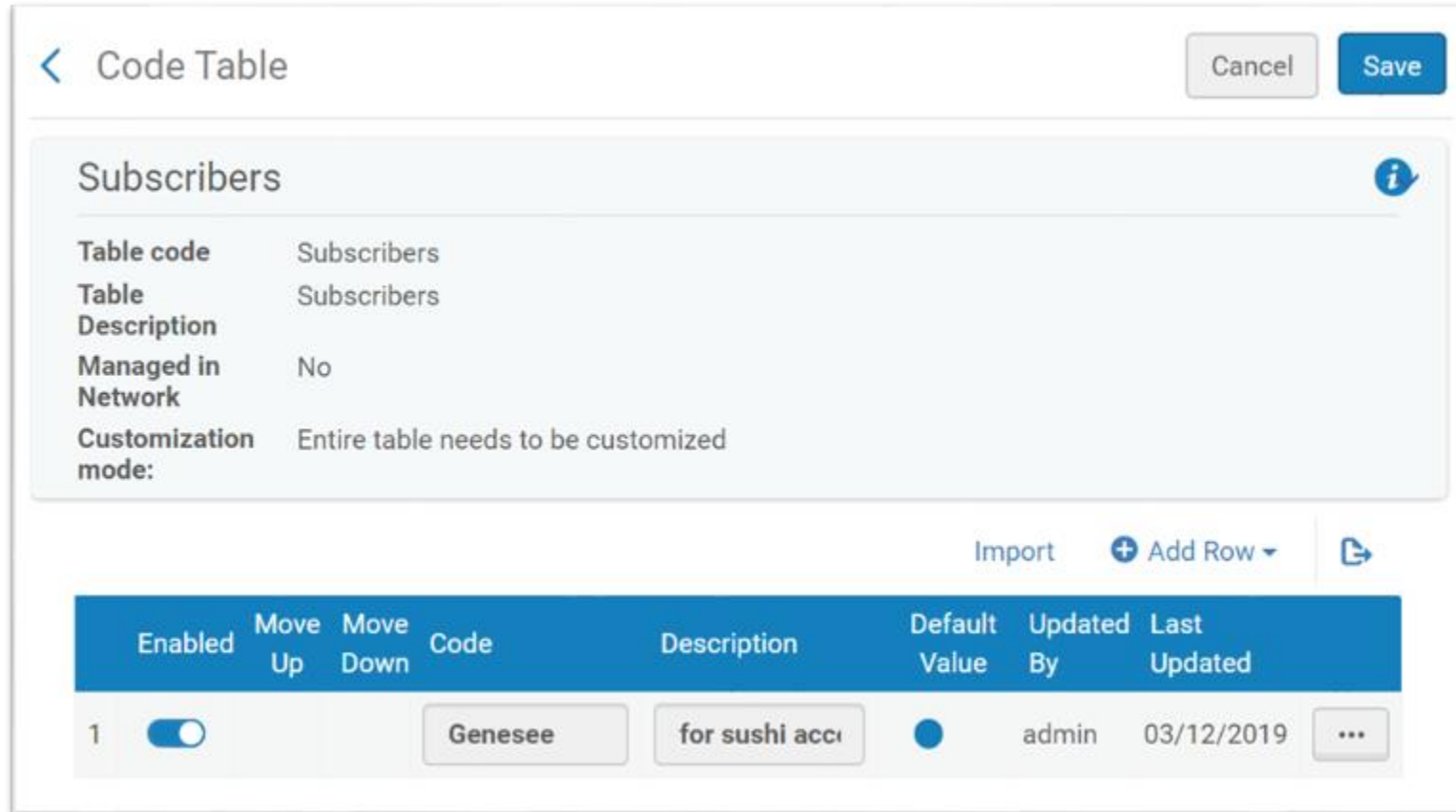
We will publish the manual in modular form, and the first two modules are now available.

# Set up Subscriber

Why?

- Need it to make analytics work correctly – it's a way for Alma to organize your reports
- Usually one subscriber, per campus, but larger institutions may have more than one
- Doesn't have to match usernames or other vendor info

Do this in Config-  
>Acquisitions->General-  
>Subscribers



The screenshot shows the 'Code Table' configuration page in Alma. At the top, there are 'Cancel' and 'Save' buttons. Below the title 'Code Table', there is a section for 'Subscribers' with an information icon. The configuration details are as follows:

Table code	Subscribers
Table Description	Subscribers
Managed in Network	No
Customization mode:	Entire table needs to be customized

Below the configuration details, there are 'Import', '+ Add Row', and a share icon. At the bottom, there is a table with the following columns: Enabled, Move Up, Move Down, Code, Description, Default Value, Updated By, Last Updated, and a menu icon.

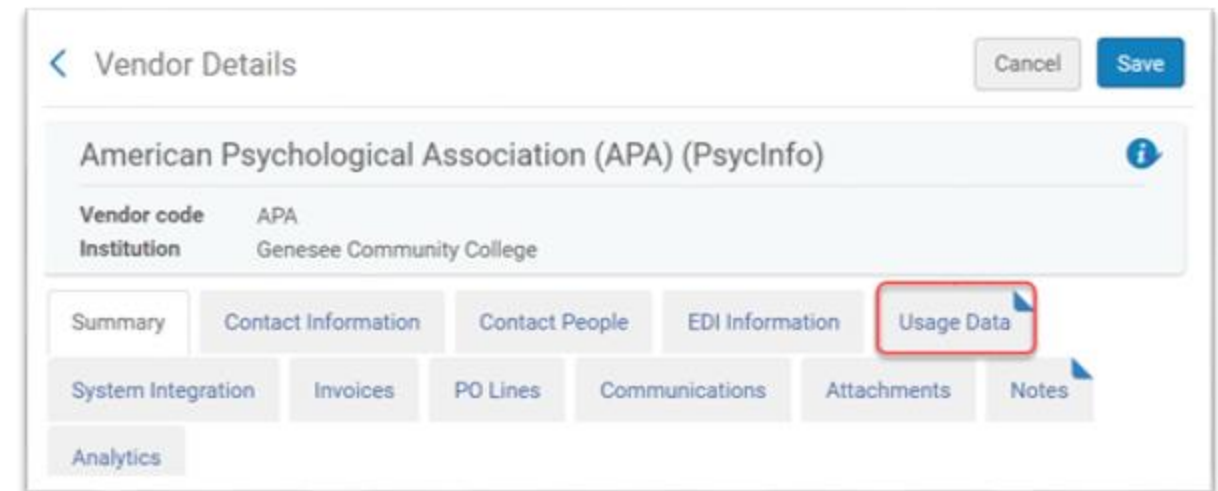
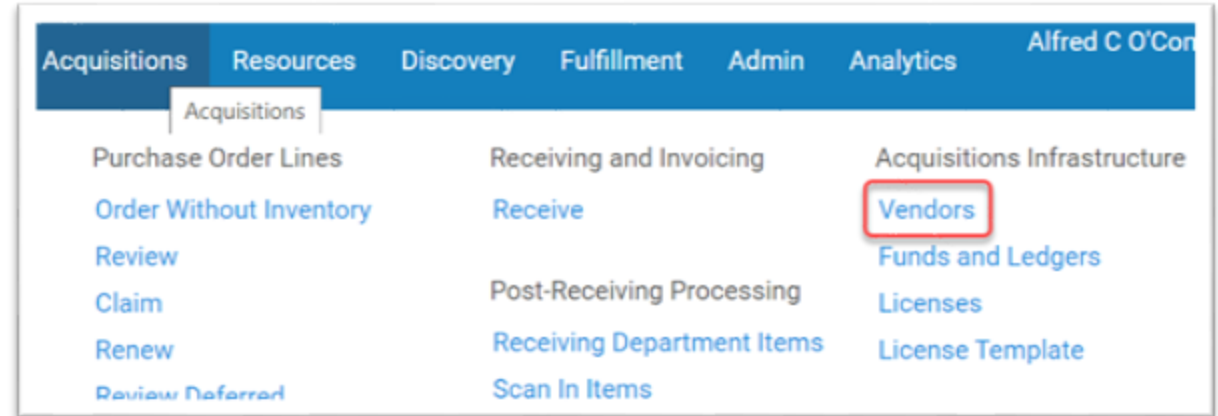
Enabled	Move Up	Move Down	Code	Description	Default Value	Updated By	Last Updated	
1	<input checked="" type="checkbox"/>		Genesee	for sushi accr	<input checked="" type="radio"/>	admin	03/12/2019	...

# Set up Access Providers

- Acquisitions-> Acquisitions Infrastructure
- Edit existing OR create new Vendor (add Type, Access Provider)
- Requires an Interface (select from CZ, or create one)
- Open the Usage Data tab

Note!

You don't have to have full ACQ set up to use usage reports.



# Usage Data Tab

Can add content manually or set up SUSHI to harvest for you

The screenshot displays the 'Usage Data Tab' interface, divided into two main sections: 'SUSHI Accounts' and 'Uploaded Files'.

**SUSHI Accounts Section:**

- Header: SUSHI Accounts
- Count: 1 - 1 of 1
- Action: **Add SUSHI Account** (highlighted with a red box)
- Filters: Subscriber: All, Report Type: All
- Table:

Active	SUSHI Account	Subscriber	Report Type	Counter Release	Contact Information
1. <input checked="" type="checkbox"/>	American Psychological Association	for sushi accounts	JR1	R4	-

**Uploaded Files Section:**

- Header: Uploaded Files
- Count: 1 - 20 of 24
- Search: Load File ID [ ] [Q]
- Action: **Upload File** (highlighted with a red box)
- Filters: Status: All Files, Subscriber: All, Upload Date: All Uploaded, Report Type: All, Clear all
- Table:

File Name	SUSHI Account	Upload Date	Uploading User	Subscriber	Status	Status Description	Report Type	Data Start Date	Data End Date	Vendor URL	Report Success Rate (Global)
Sushi_Americ...	American	21 Mar 2020	Sushi	for sushi	Full						Yearly: 0.0%

# Retrieve Files Manually

Retrieve COUNTER file from your vendor site, your rep, monthly stats email, etc.

Which file? Some commonly used reports are:

- **TR\_J1** (replaces JR1 from COUNTER R4): 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.
- **TR\_B1** (replaces BR1 from COUNTER R4): 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).

# Usage Data Loader

Acquisitions -> Import ->  
Load Usage Data

Ex Libris Documentation  
on [manually loading and deleting reports](#)

Usage Data Loader

Uploaded Files Monthly Usage Data

1 - 20 of 55 Load File ID [ ] [ ] Upload File [ ] [ ] [ ]

Status: All Files Subscriber: All Upload Date: All Uploaded Report Type: All Vendor: All SUSHI Account: All Clear all

File Name	Vendor	SUSHI Account	Upload Date	Uploading User	Subscribe	Status	Status Descrip	Report Type	Data Start Date	Data End Date	Vendor URL	Report Success Rate (Global)
1 Sushi_Scita... - AIP (American Institute of Physics)_dr...	AIP/Scitati...	Scitation - AIP (Americ... Institute of Physics)	28 Nov 2020 09:02:30	Sushi Scheduler	SUNY Polytechnic Institute	Fully process...	-	dr_d...	Jan 2020	Oct 2020	https://...	Yearly: 100.0% Half-Year: 100.0% Quarterly: 100.0%
2 Sushi_Scita... - AIP (American Institute of Physics)_dr...	AIP/Scitati...	Scitation - AIP (Americ... Institute of Physics)	28 Nov 2020 09:02:26	Sushi Scheduler	SUNY Polytechnic Institute	Fully process...	-	dr_d...	Nov 2019	Dec 2019	https://...	Yearly: 100.0% Half-Year: 100.0% Quarterly: 100.0%

# Manual Upload: Upload Files

- Manual Upload (xlsx, xls, csv, tsv, ssv, txt formats)
- “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.”

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/020Acquisitions/090Acquisitions\\_Infrastructure/010Managing\\_Vendors/Managing\\_COUNTER-Compliant\\_Usage\\_Data#Manually\\_Uploading\\_and\\_Deleting\\_COUNTER\\_Data](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/090Acquisitions_Infrastructure/010Managing_Vendors/Managing_COUNTER-Compliant_Usage_Data#Manually_Uploading_and_Deleting_COUNTER_Data)



# Manual Upload: Upload Files

Usage Data Loader

Uploaded Files Monthly Usage Data

1 - 1 of 1 Uploading User: suny-susan

Status: All Files Subscriber: All Upload Date: All Uploaded Report Type: All Vendor: Ebsco SUSHI Account: All Clear all

File Name	Vendor	SUSHI Account	Upload Date	Uploading User	Subscribe	Status	Status Descrip	Report Type	Data Start Date	Data End Date	Vendor URL	Report Success Rate (Global)
1 EBSCO_COU... EBSCO_COUNTER(R5)PlatformMasterReport_s9000883_Nov24,2020.xlsx	Ebsco	-	24 Nov 2020 00:50:33	suny-susan	Niagara County Community	Fully process...	-	pr.R5	Oct 2020	Oct 2020	-	-

Two places you can enter (or edit or view)

- Usage Data Loader
- Vendor record

# SUSHI



## What is it?

- Many providers support the SUSHI protocol (Standardized Usage Statistics Harvesting Initiative), which allows Alma to retrieve (harvest) and upload COUNTER data.
- In R5, SUSHI reports are returned in [JSON](#) format (JavaScript Object Notation).

A screenshot of the NISO website. The top left features the NISO logo. To the right is a 'MEMBER LOGIN' link and a search bar. Below the logo is a navigation menu with links: Home, What We Do, Join NISO, Explore, Events, NISO I/O, Standards Committees, and Standards &amp; Publications. Below the navigation menu is a breadcrumb trail: Home / Standards Committees. The main heading reads: Standardized Usage Statistics Harvesting Initiative (SUSHI) Protocol (ANSI/NISO Z39.93-2014).

# SUSHI-certified Vendors

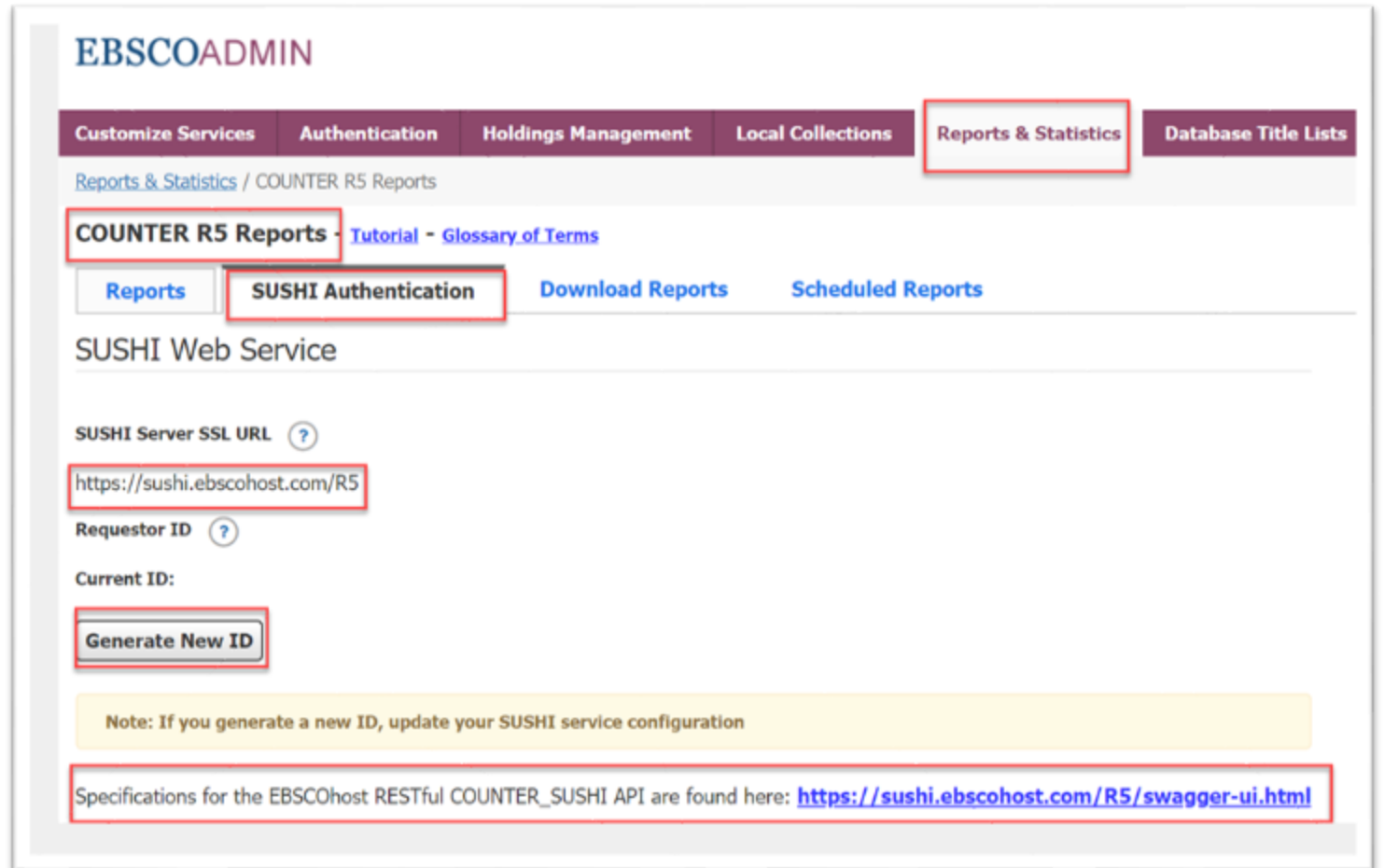
Ex Libris [list of certified vendors](#)

Name	Vendor URL	Special Instructions
Academy of Management	<a href="https://journals.aom.org">https://journals.aom.org</a>	
ACM (Digital Library)	<a href="https://dl.acm.org/">https://dl.acm.org/</a>	
ACS (American Chemical Society)	<a href="https://pubs.acs.org/">https://pubs.acs.org/</a>	
Adam Matthew Digital	<a href="https://www.counter.amdigital.co.uk/CounterSushi5Api">https://www.counter.amdigital.co.uk/CounterSushi5Api</a>	Connection requires API Key.
Akademiai Kiado (AKJournals)	<a href="https://ams.akjournals.com/rest/COUNTER/v5/">https://ams.akjournals.com/rest/COUNTER/v5/</a>	Vendor requires - Customer ID - API key Listed on PubFactory dashboard: <a href="https://ams.akjournals.com">https://ams.akjournals.com</a>
Alexander Street	<a href="https://pqbi.prod.proquest.com/release/sushi/asp/sushi/">https://pqbi.prod.proquest.com/release/sushi/asp/sushi/</a>	Connection requires: Requester ID and Customer ID

# SUSHI Credentials

Where do these come from and how do you set them up?

- Varies by vendor; may need to contact tech support; e.g. Elsevier
- Sometimes you can find them in the Admin portal, e.g. EBSCO

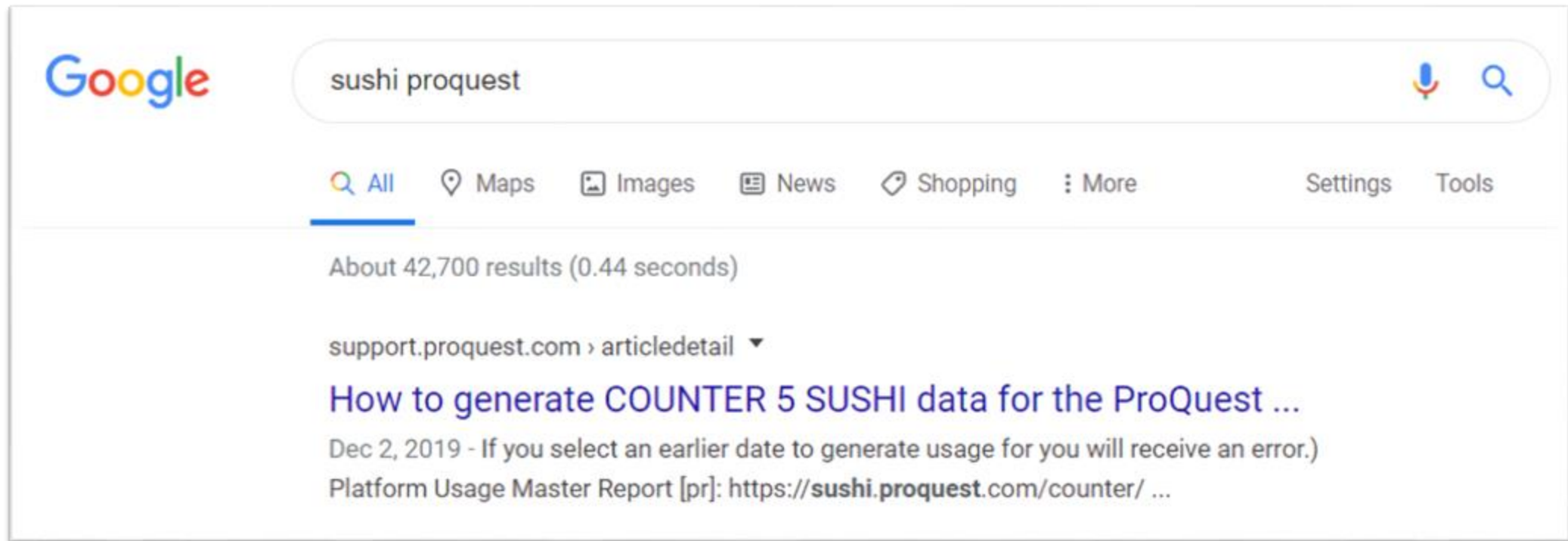


The screenshot displays the EBSCOADMIN interface. At the top, the 'Reports & Statistics' menu item is highlighted. Below it, the 'COUNTER R5 Reports' section is active, with a sub-menu item 'SUSHI Authentication' highlighted. The page title is 'SUSHI Web Service'. Under the heading 'SUSHI Server SSL URL', the URL 'https://sushi.ebscohost.com/R5' is entered. Below this, the 'Requestor ID' field is empty, and a 'Generate New ID' button is visible. A yellow note states: 'Note: If you generate a new ID, update your SUSHI service configuration'. At the bottom, a link is provided: 'Specifications for the EBSCOhost RESTful COUNTER\_SUSHI API are found here: <https://sushi.ebscohost.com/R5/swagger-ui.html>'.

# SUSHI Credentials, cont.

Where do these come from and how do you set them up?

- Sometimes a Google search helps – may find vendor data or how-to posted by another library
- Post on Basecamp to see if colleagues know how to set up vendor



# SUSHI: COUNTER R5 Template

**SUSHI Account Details** Contribute Test Connection Cancel Save

**Vendor code** APA **SUSHI account type** Release 5

**Account Identifier**

<b>SUSHI Account *</b>	<input type="text"/>	<b>Status</b>	<b>Active</b>
<b>Vendor URL</b>	<input type="text"/>	<b>Override URL *</b>	<input type="text"/>
<b>Subscriber *</b>	<b>for sushi accounts</b>	<b>Contact Information</b>	<input type="text"/>

**Request Details**

<b>Requester ID</b>	<input type="text"/>	<b>Requester Name</b>	<input type="text"/>
<b>Customer ID</b>	<input type="text"/>	<b>Customer Name</b>	<input type="text"/>
<b>User Name</b>	<input type="text"/>	<b>Password</b>	<input type="text"/>
<b>Requester Email</b>	<input type="text"/>	<b>API Key</b>	<input type="text"/>

**Usage Report Types**

# SUSHI: COUNTER R5 Notes

- If you have selected Release 5 in SUSHI Account type, only R5 vendors appear in the drop-down list.
- If you select a vendor from this list, **Vendor URL** is prefilled with the correct URL. (Other information may also be prefilled.)
- However, you do not have to select a predefined certified vendor; you can enter any value you like.
- Enter **Contact Information**. Typically, this is a URL or email account of the vendor.
- Enter required credentials in the **Request Details** area. Some information may be prefilled; your vendor will supply you with the required information for this area.
- **Add Report Type** for each of the report types desired.
- Select **Save**. The account is saved and appears in the **Usage Data** tab.

Ex Libris Documentation on [Managing SUSHI Accounts](#)

# SUSHI COUNTER R5 Testing

Once you've entered the required information, select **Test Connection**.

For R5 accounts, a JSON file is generated, with the connection status, and any errors, if applicable.

< SUSHI Account Details Test Connection Cancel Save

American Chemical Society i >

Account Identifier v

SUSHI Account *	American Chemical Society	Status	Active <span style="float: right;">ⓘ v</span>
Vendor URL	<input type="text" value="https://pubs.acs.org/"/>	Override URL	<input type="text"/>
Subscriber *	SUNY Polytechnic Institute	Contact Information	<input type="text"/>



# SUSHI COUNTER R5 Testing

```
{"Description":"COUNTER Usage Reports for Credo platform", "ServiceActive":true, "RegistryURL":"https://www.projectcounter.org/counter-user/credo-referenc"}
```

**Success!!**

```
{"Description":"COUNTER 5 Usage Reports for JSTOR", "Note":"Support URL: https://support.jstor.org/hc/en-us/articles/360015483214", "ServiceActive":true, "Alerts":"We are currently experiencing issues with our usage reporting service. We apologize for the inconvenience and are working to resolve the issue as quickly as possible.", "RegistryURL":"https://www.projectcounter.org/counter-user/jstor"}
```

**Vendor issues**

# SUSHI: On-demand: Harvest Now

Vendor Details

American Chemical Society

Summary | Contact Information | Contact People | EDI Information | Usage Data | System Integration | Invoices | PO Lines | Communications

Attachments | Notes | Analytics

SUSHI Accounts

1 - 1 of 1

Subscriber: All | Report Type: All | Counter Release: All

Active	SUSHI Account	Subscriber	Report Type	Counter Release	Contact Information
<input checked="" type="checkbox"/>	American Chemical Society	SUNY Polytechnic Institute	tr	R5	-

Uploaded Files

1 - 8 of 8

Status: All Files | Subscriber: All | Upload Date: All Uploaded | Report Type: All | SUSHI Account: All

Context Menu:

- Edit
- Harvest Now
- View History
- Delete

Content populates the Uploaded Files area.  
Needs to run a job – won't happen instantly.

# SUSHI: Scheduler

- Harvests COUNTER data from all active SUSHI accounts.
- Checks whether overlapping data exists in the database.
- File must be ready at the vendor site.
- When Alma receives a response that the report will be available later, it automatically retries – until the maximum number of retries is reached.

Ex Libris documentation on [managing harvesting](#)

# SUSHI: Scheduler (or) On-demand

Configuration Menu > Acquisitions > General > Acquisition Jobs Configuration

**Acquisition Jobs Configuration**

**PO Line package job**

Status  Active  Inactive

PO Line package job schedule: **Every day at 16:00**

**PO Line package job parameters**

PO Line continuous limit \*

PO Line one time limit \*

Package PO Line by Fund

**SUSHI harvesting job**

Status  Active  Inactive

SUSHI harvesting job schedule: **Every Saturday at 0**

Options:

- Every Saturday @ 4 AM
- 4th of the month @ 8 PM
- 11th of the month @ 8 PM
- 18th of the month @ 8 PM
- 25th of the month @ 8 PM

(optional) email notifications

# Problem solving

[https://knowledge.exlibrigroup.com/Alma/Knowledge\\_Articles/Troubleshooting\\_Tips\\_for\\_COUNTER\\_5\\_SUSHI\\_Harvesting](https://knowledge.exlibrigroup.com/Alma/Knowledge_Articles/Troubleshooting_Tips_for_COUNTER_5_SUSHI_Harvesting)

Search Basecamp  
[Using Alma for e-resources usage data - 10/21/20](#)

Home » Alma » Knowledge Articles » Troubleshooting Tips for COUNTER 5 SUSHI Harvesting

## Troubleshooting Tips for COUNTER 5 SUSHI Harvesting

- **Product:** Alma

**Question**  
What steps can be taken to troubleshoot the connection for COUNTER Release 5 SUSHI Accounts in Alma?

**Answer**

**Test Connection**

- Click "Test Connection" at the top of the SUSHI account to send a status request to the vendor API
- This test will return a JSON file that can be opened in a text editor or viewed using an online tool like <https://jsonformatter.org/>
- A successful response will contain the line `"Service_Active": true`

# Webinar Series: Usage Statistics for Electronic Resources

**Session 2:** 12/10/20 at 2 pm

Utilizing design analytics to create reports.

<https://slcny.libcal.com/event/7243660>

If you have suggestions or requests for specific reports, please let us know.

[info@slcny.libanswers.com](mailto:info@slcny.libanswers.com)

