Usage Statistics for Electronic Resources: Set Up

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Susan Perry
Michelle Eichelberger

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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

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

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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
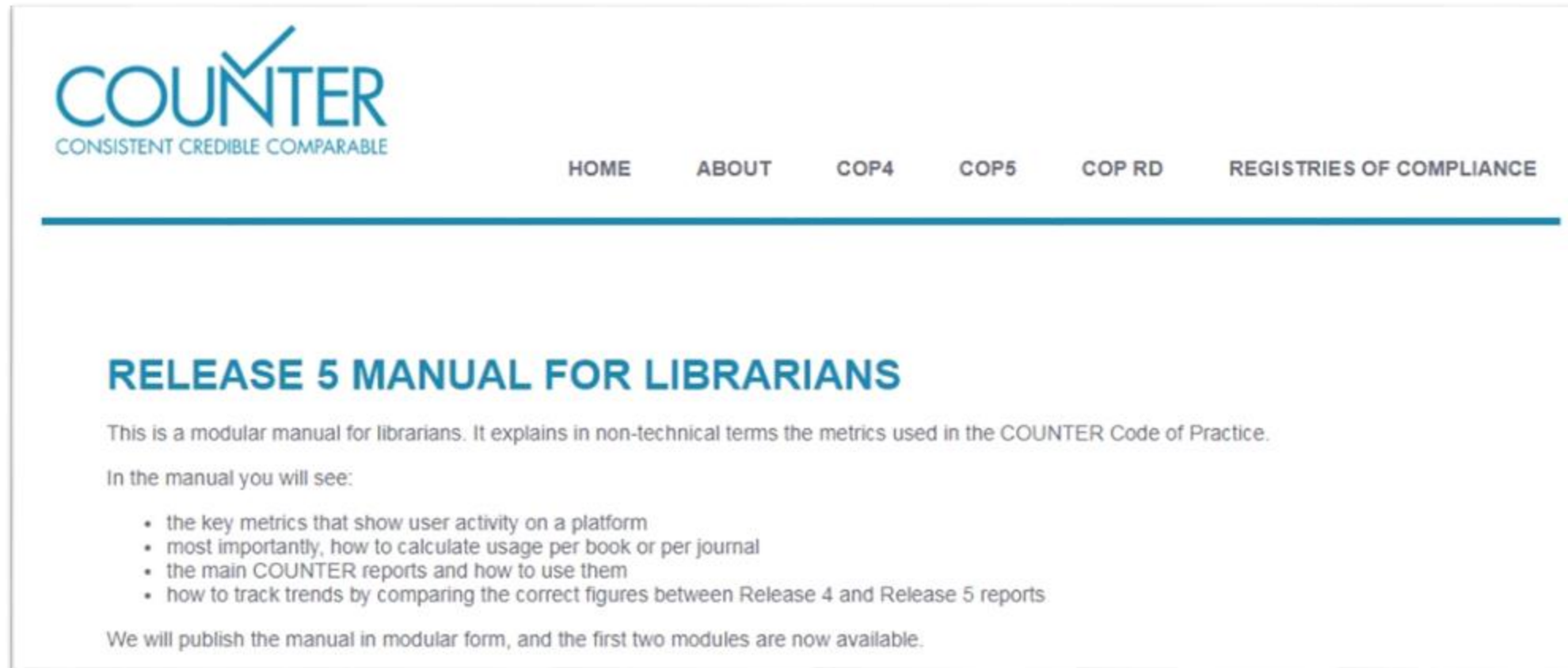
Platform = vendor interface

Supported COUNTER Report Types

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

www.suny.edu

COUNTER R5 Report Types

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

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

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.
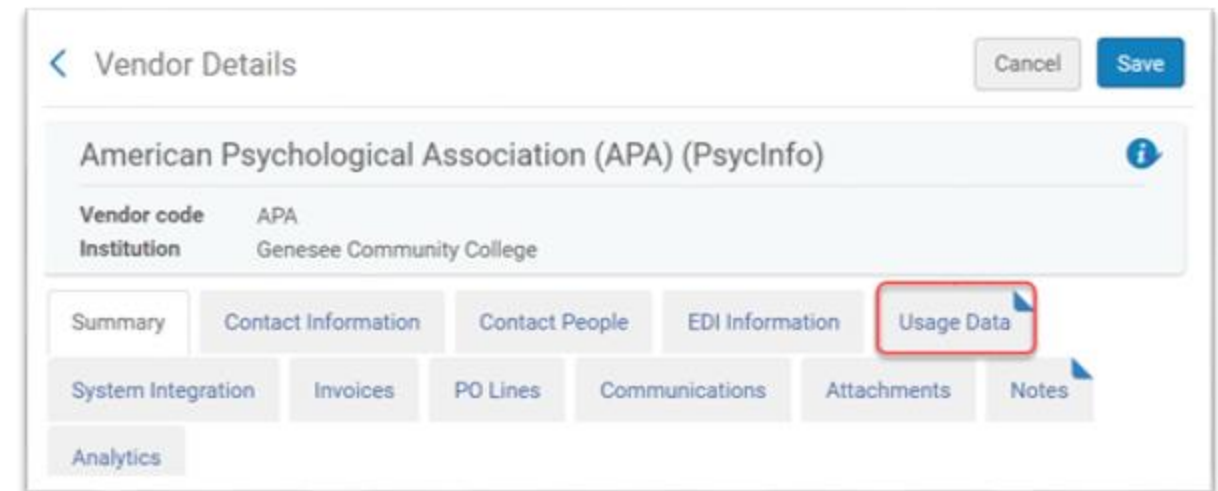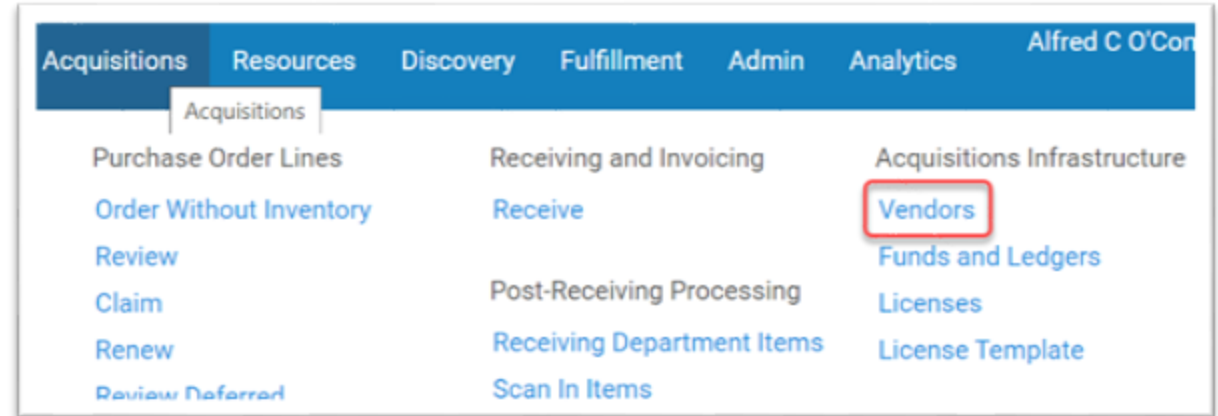
Usage Data Tab

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

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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

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

Manual Upload: Upload Files

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).

SUSHI-certified Vendors
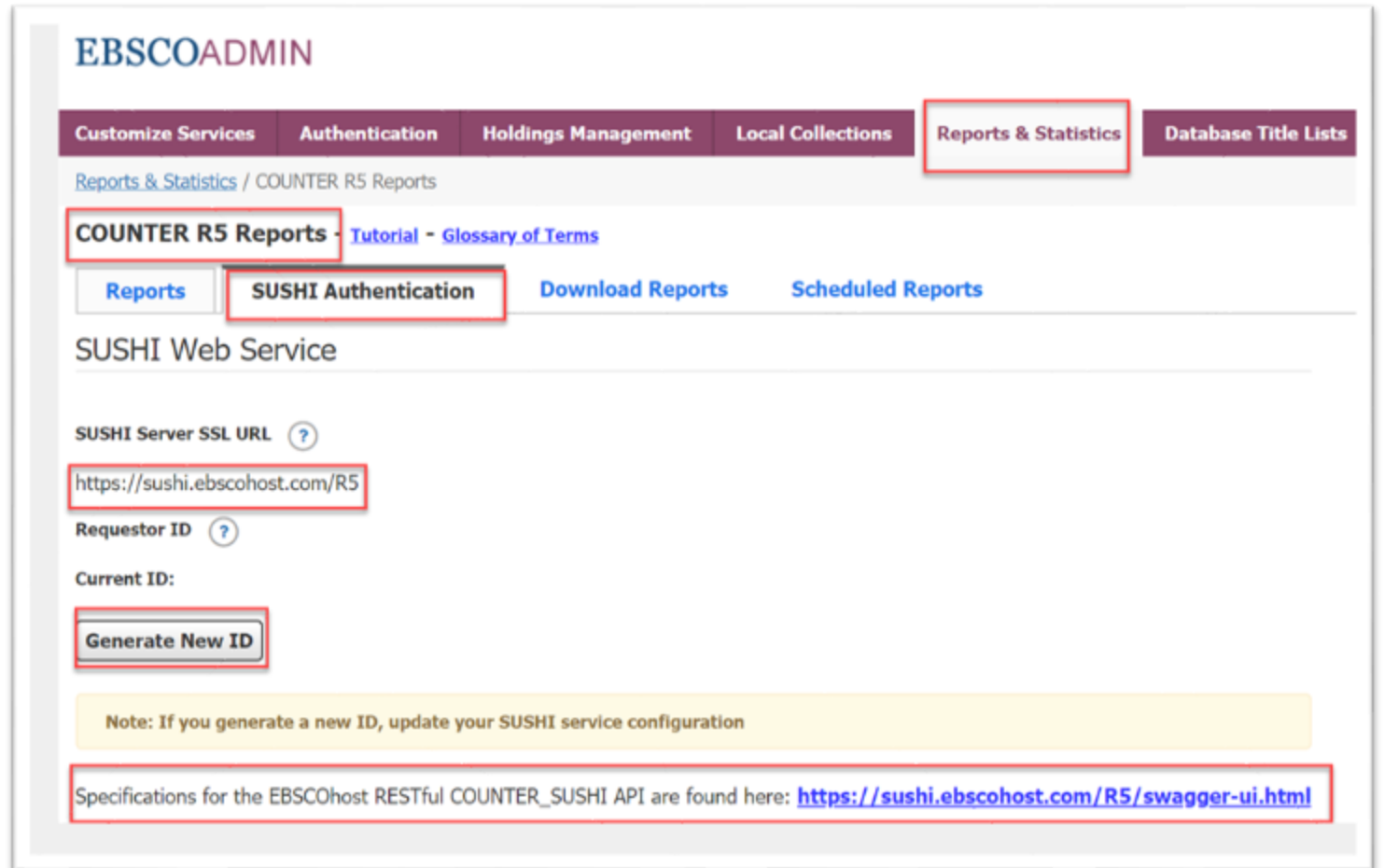
Ex Libris [list of certified vendors](#)

SUSHI-Certified Vendors Release 5

Name	Vendor URL	Special Instructions
Academy of Management	https://journals.aom.org	
ACM (Digital Library)	https://dl.acm.org/	
ACS (American Chemical Society)	https://pubs.acs.org/	
Adam Matthew Digital	https://www.counter.amdigital.co.uk/CounterSushi5Api	Connection requires **API Key**.
Akademiai Kiado (AKJournals)	https://ams.akjournals.com/rest/COUNTER/v5/	Vendor requires - Customer ID - API key Listed on PubFactory dashboard: https://ams.akjournals.com
Alexander Street	https://pqbi.prod.proquest.com/release/sushi/asp/sushi/	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
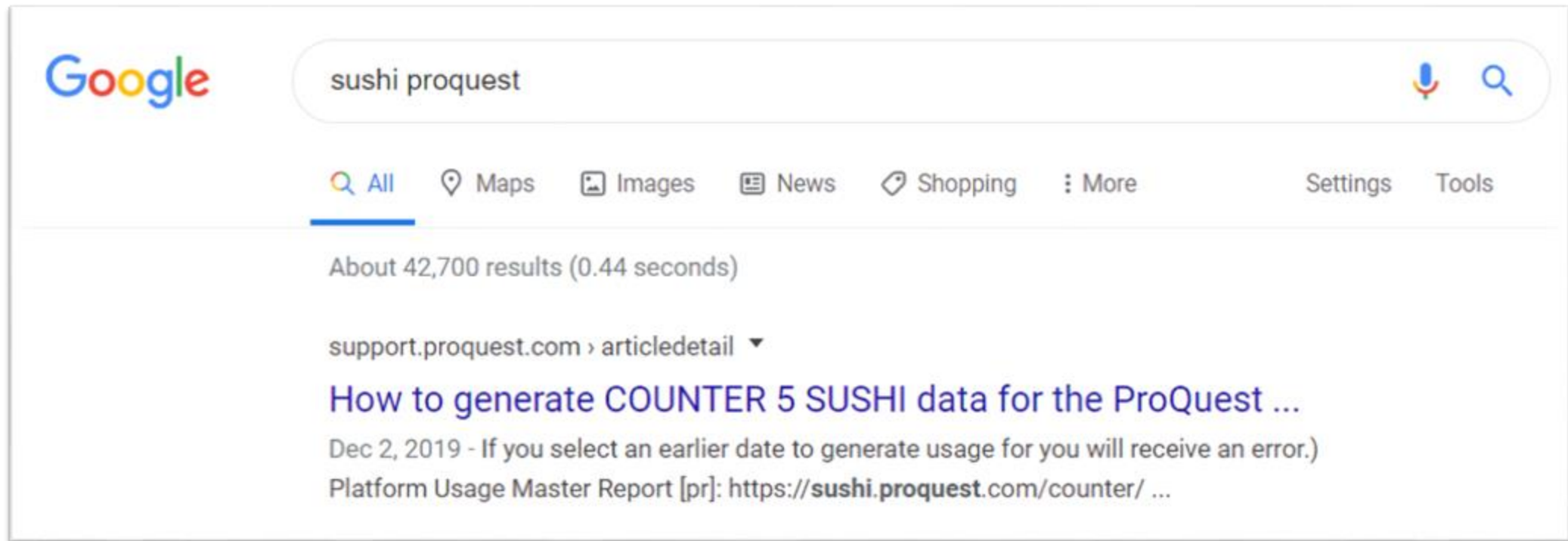- Sometimes you can find them in the Admin portal, e.g. EBSCO

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: 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.

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SUSHI COUNTER R5 Testing

{"Description":"COUNTER Usage Reports for Credo platform","ServiceActive":true,"RegistryURL":"https:\/\/www.projectcount er.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

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SUSHI: On-demand: Harvest Now

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

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.exlibrisg
roup.com/Alma/Knowledge
Articles/Troubleshooting
Tips_for_COUNTER_5_SUS
HI_Harvesting

Search Basecamp
Using Alma for e-resources
usage data - 10/21/20

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