ERM Training for Alma

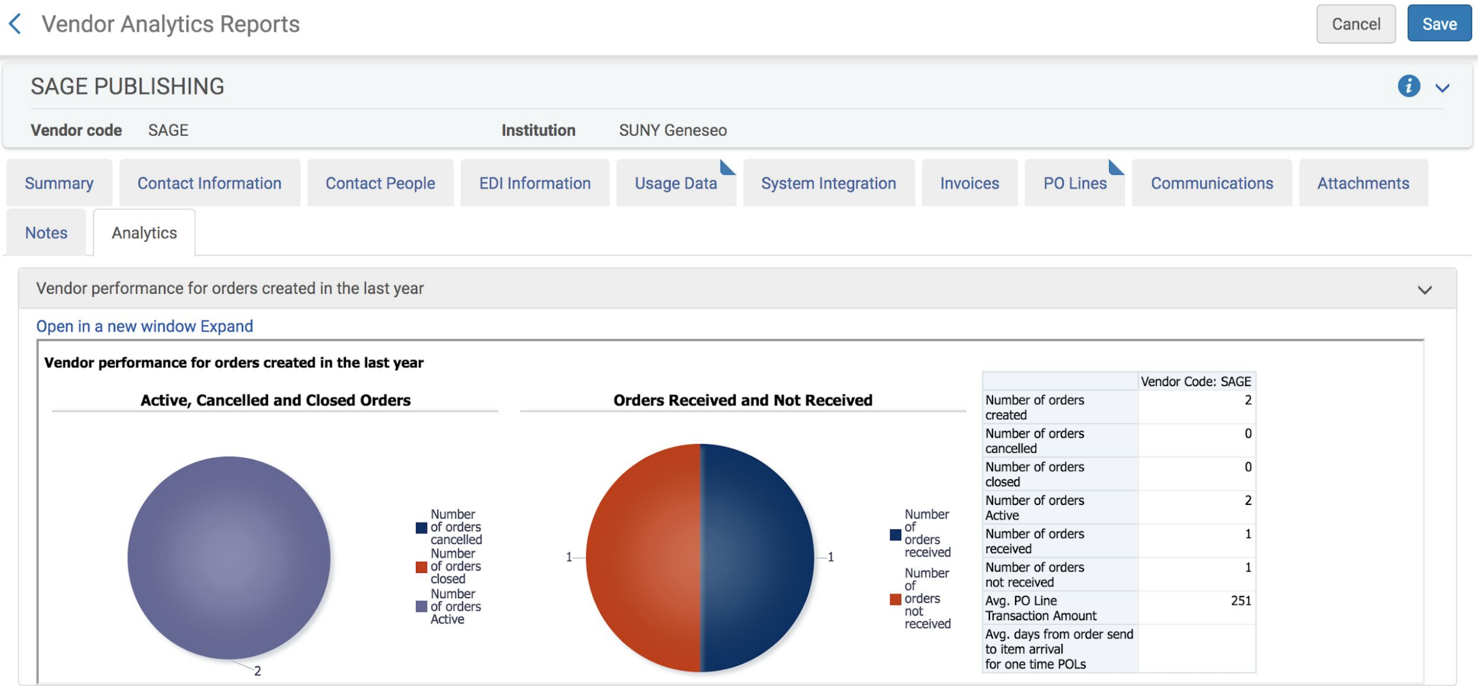
Session 7:
Electronic Resources Usage Statistics:
COUNTER & SUSHI

April 15, 2019

What are the options available in Alma to track and manage usage statistics from vendors?

- Alma handles COUNTER reports only
- Usage statistics are managed in the vendor record
- Two options to harvest COUNTER statistics:
    - Manual COUNTER report upload
    - SUSHI integration

What are the benefits of harvesting and tracking usage statistics in Alma?



Analytics!

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.

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

- Supported COUNTER Report Types
- SUSHI-Certified Vendors

Manually Upload COUNTER Reports to Alma

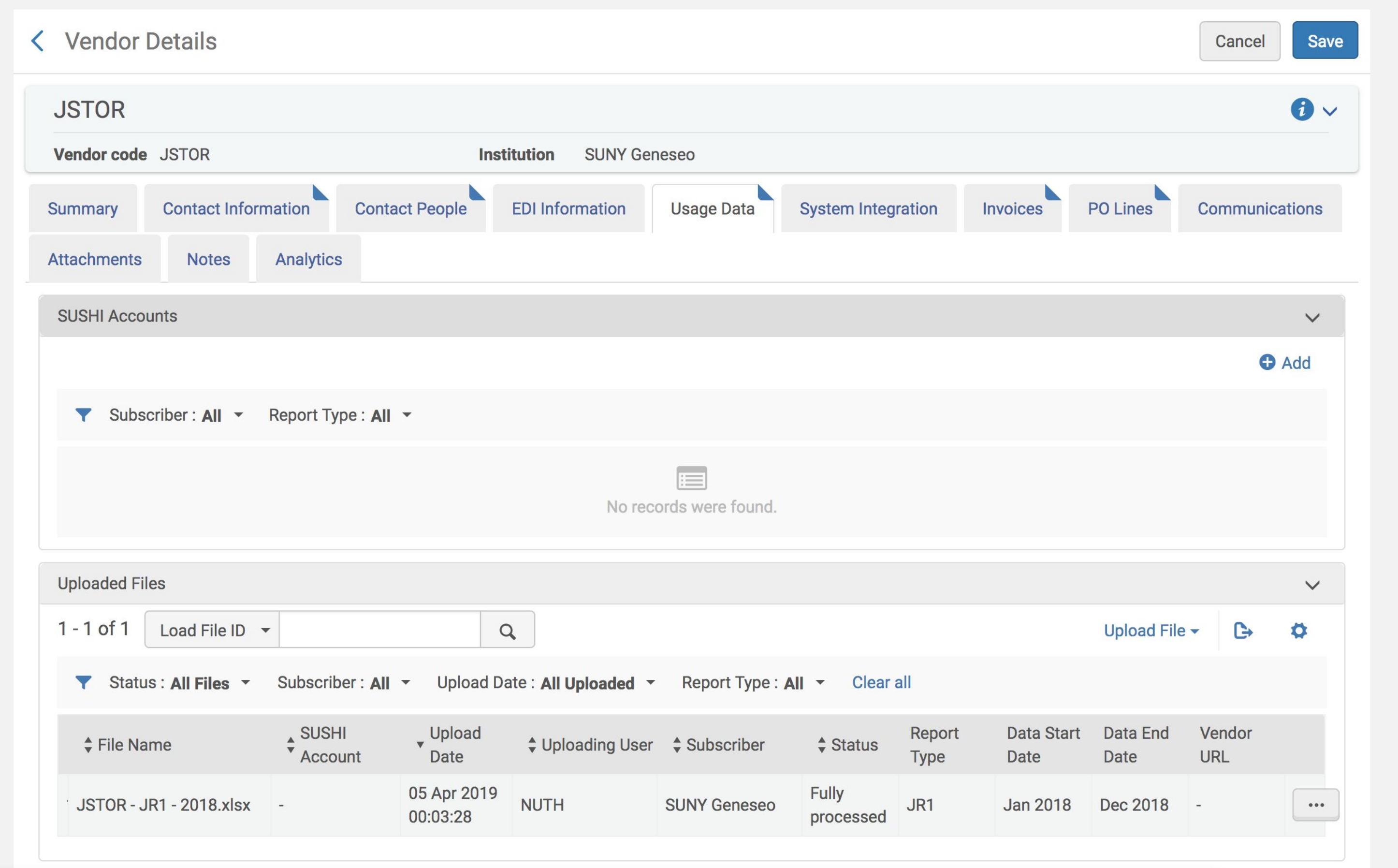
Manually Uploading COUNTER Reports

Reports can be uploaded in two places:

- In the Usage Data tab of the vendor record (Acquisitions → Vendors)
- In Load Usage Data (Acquisitions → Import → Load Usage Data)

We will take a look at both methods to upload usage data, but it's probably easiest to use the Usage Data Loader (especially if loading a lot of reports). The usage statistics report will be available in the vendor record when using either method.

Example of Usage Data in Vendor Record



Example of Usage Data Loader

Usage Data Loader

Uploaded Files | Missing Data

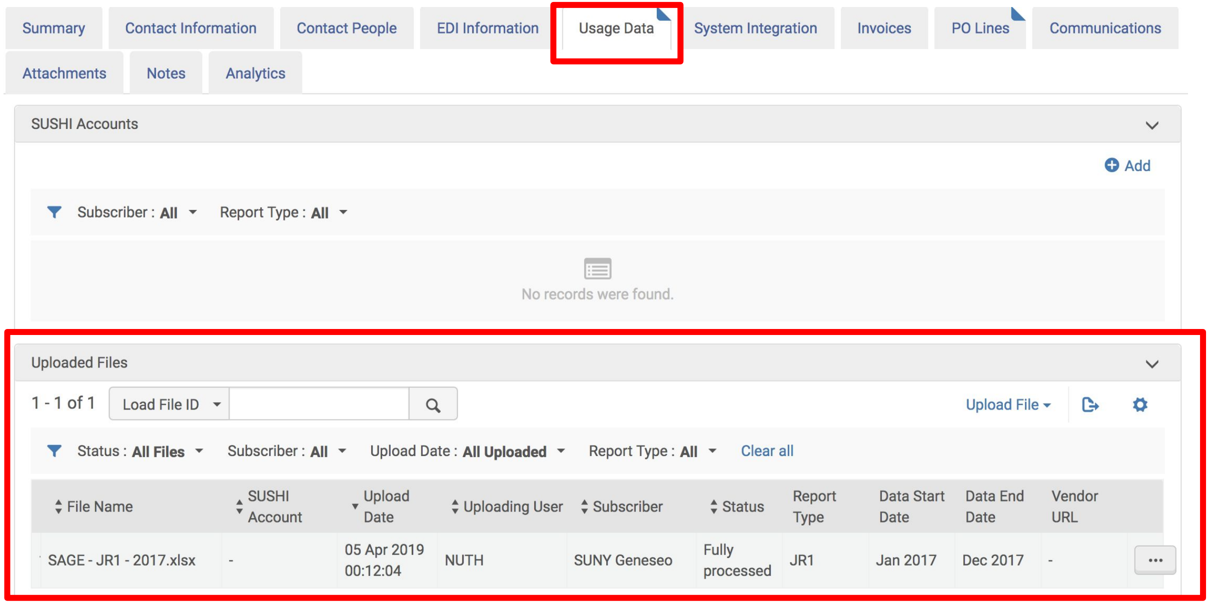
1 - 9 of 9 | Load File ID | Upload File

Status : **All Files** | Subscriber : **All** | Upload Date : **All Uploaded** | Report Type : **All** | Vendor : **All** | Clear all

File Name	Vendor	SUSHI Account	Upload Date	Uploading User	Subscriber	Status	Report Type	Data Start Date	Data End Date	Vendor URL	
JSTOR - JR1 - 2018.xlsx	JSTOR	-	05 Apr 2019 00:03:28	NUTH	SUNY Geneseo	Fully process...	JR1	Jan 2018	Dec 2018	-	...
SAGE - JR1 - 2017.xlsx	KANOPY	-	19 Feb 2019 16:41:44	NUTH	SUNY Geneseo	Fully process...	JR1	Jan 2017	Dec 2017	-	...
SAGE - JR1 - 2017.xlsx	KANOPY	-	19 Feb 2019 00:41:33	NUTH	SUNY Geneseo	Fully process...	JR1	Jan 2017	Dec 2017	-	...
SAGE - JR1 - 2017.xlsx	KANOPY	-	18 Feb 2019 22:00:22	NUTH	SUNY Geneseo	Fully process...	JR1	Jan 2017	Dec 2017	-	...
SAGE - JR1 - 2017.xlsx	KANOPY	-	17 Feb 2019 21:48:26	NUTH	SUNY Geneseo	Fully process...	JR1	Jan 2017	Dec 2017	-	...
SAGE - JR1 - 2017.xlsx	test	-	09 Feb 2019 20:30:53	NUTH	SUNY Geneseo	Fully process...	JR1	Jan 2017	Dec 2017	-	...

Upload COUNTER Report to Vendor Record

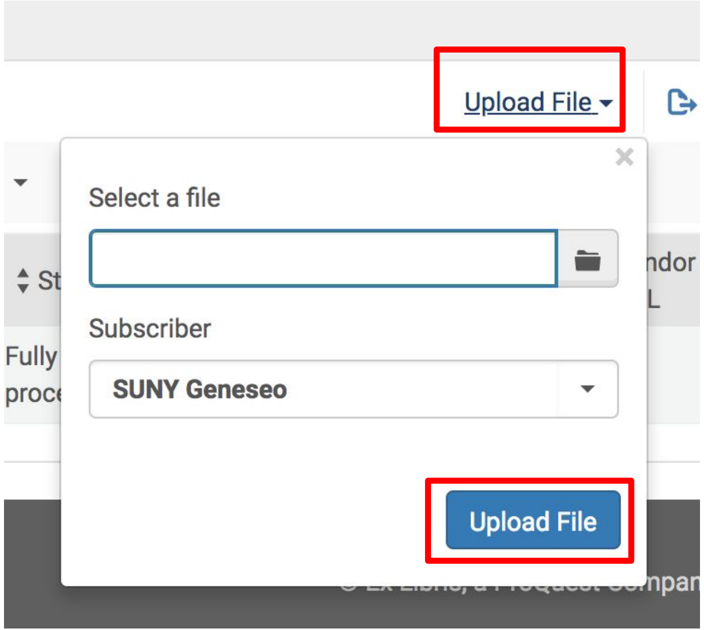
- Acquisitions → Vendors
- Browse or search by vendor to retrieve the desired vendor record
- Edit the record by using the ellipses
- Navigate to the Usage Data tab



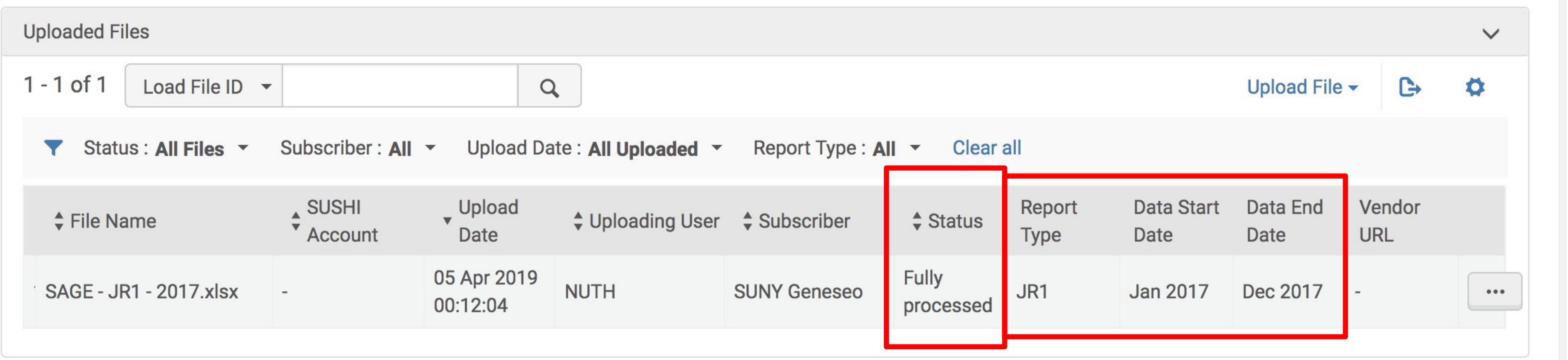
- Click Upload File and select the desired file
- The Subscriber field can likely be left as is
- Click Upload File again

Alma accepts the following file types: xlsx, xls, csv, txt, or tsv.

Configuring COUNTER Subscribers, Managing COUNTER-Compliant Usage Data, Ex Libris
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/090Acquisitions_Infrastructure/010Managing_Vendors/Managing_COUNTER-Compliant_Usage_Data

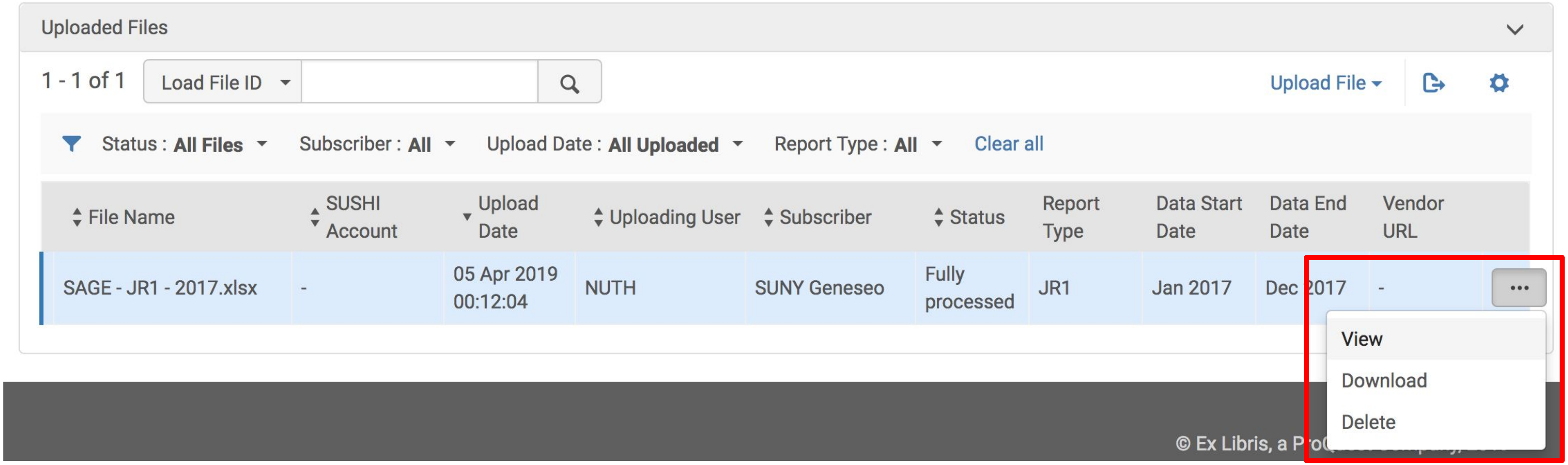


It will likely take several moments, but the file will load and appear in the Uploaded Files section of the Usage Data tab.

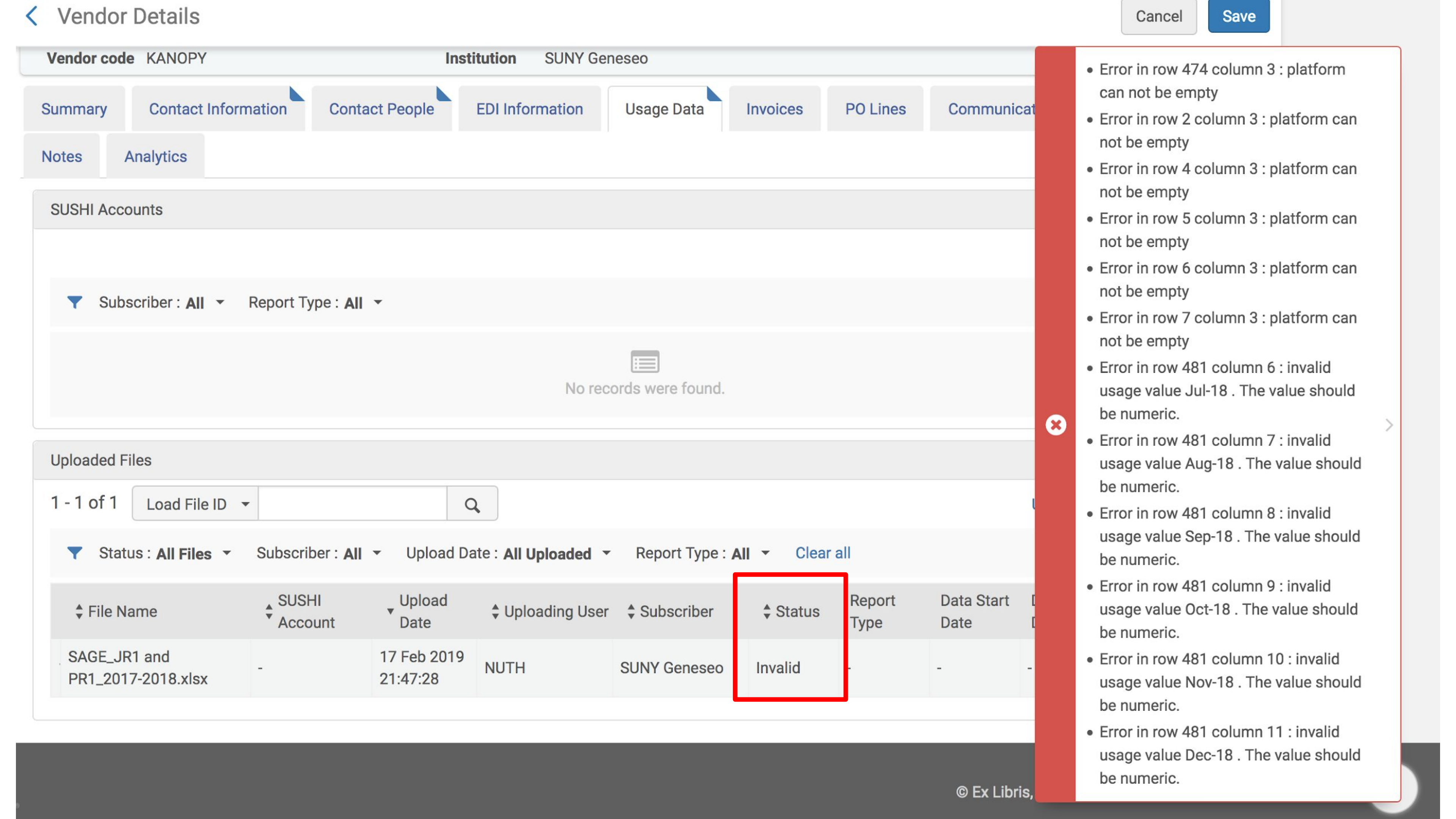


Alma will identify the Report Type, Data Start Date, and Data End Date

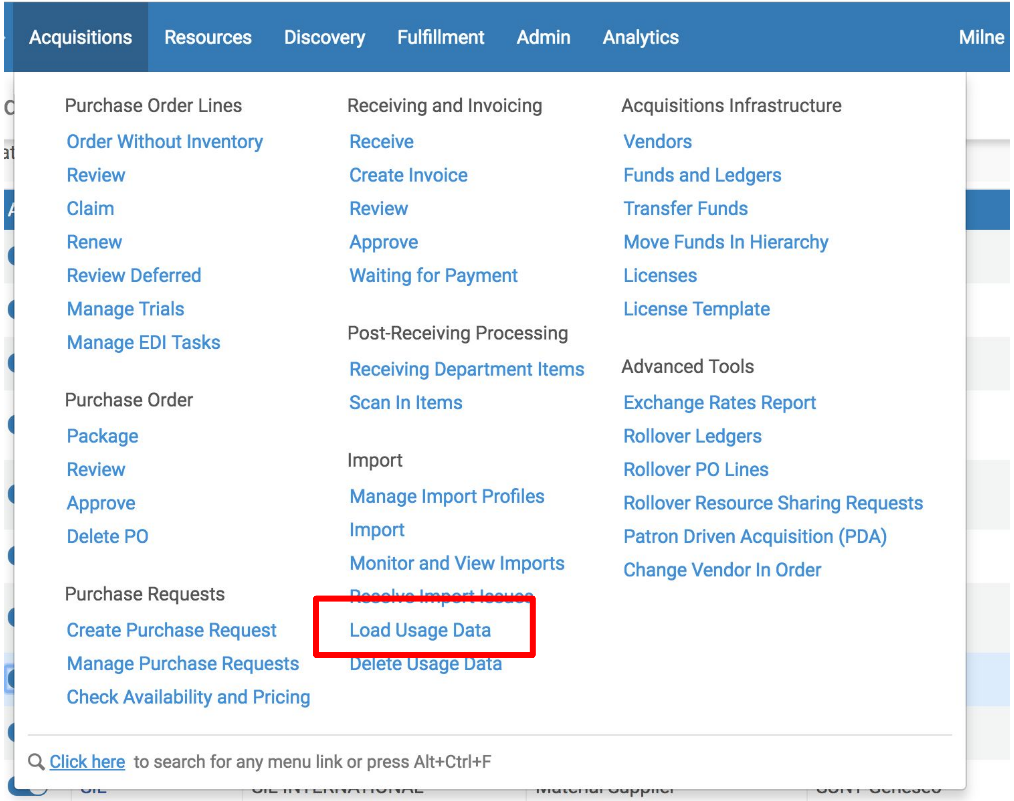
Using the ellipses, files can be Viewed, Downloaded, and Deleted



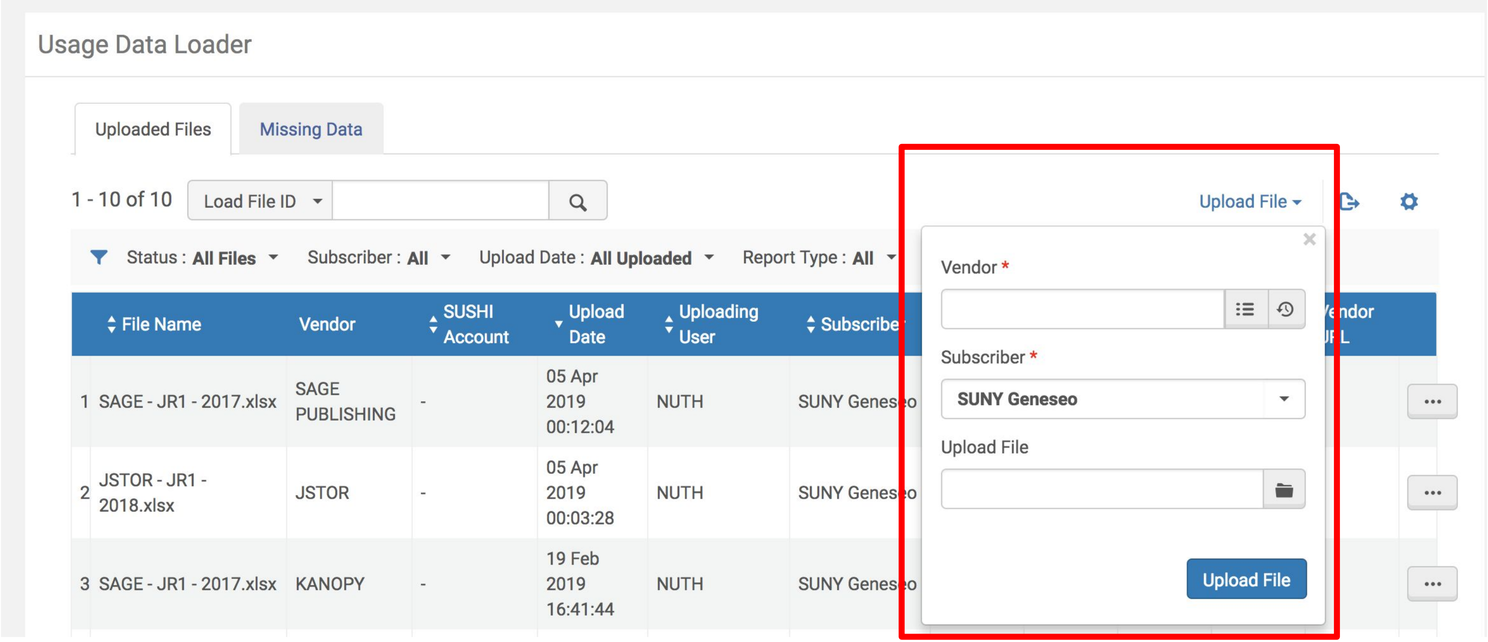
Files will be rejected if the file is not formatted correctly. Alma will present a list of errors that have to be corrected before the file will load.


Vendor Details
Cancel
Save
Vendor code KANOPY
Institution SUNY Geneseo
Summary
Contact Information
Contact People
EDI Information
Usage Data
Invoices
PO Lines
Notes
Analytics
SUSHI Accounts
Subscriber : All
Report Type : All
No records were found.
Uploaded Files
1 - 1 of 1
Load File ID
Status : All Files
Subscriber : All
Upload Date : All Uploaded
Report Type : All
Clear all
File Name
SUSHI Account
Upload Date
Uploading User
Subscriber
Status
Report Type
Data Start Date
SAGE_JR1 and PR1_2017-2018.xlsx
17 Feb 2019 21:47:28
NUTH
SUNY Geneseo
Invalid
Error in row 474 column 3 : platform can not be empty
Error in row 2 column 3 : platform can not be empty
Error in row 4 column 3 : platform can not be empty
Error in row 5 column 3 : platform can not be empty
Error in row 6 column 3 : platform can not be empty
Error in row 7 column 3 : platform can not be empty
Error in row 481 column 6 : invalid usage value Jul-18 . The value should be numeric.
Error in row 481 column 7 : invalid usage value Aug-18 . The value should be numeric.
Error in row 481 column 8 : invalid usage value Sep-18 . The value should be numeric.
Error in row 481 column 9 : invalid usage value Oct-18 . The value should be numeric.
Error in row 481 column 10 : invalid usage value Nov-18 . The value should be numeric.
Error in row 481 column 11 : invalid usage value Dec-18 . The value should be numeric.
© Ex Libris,

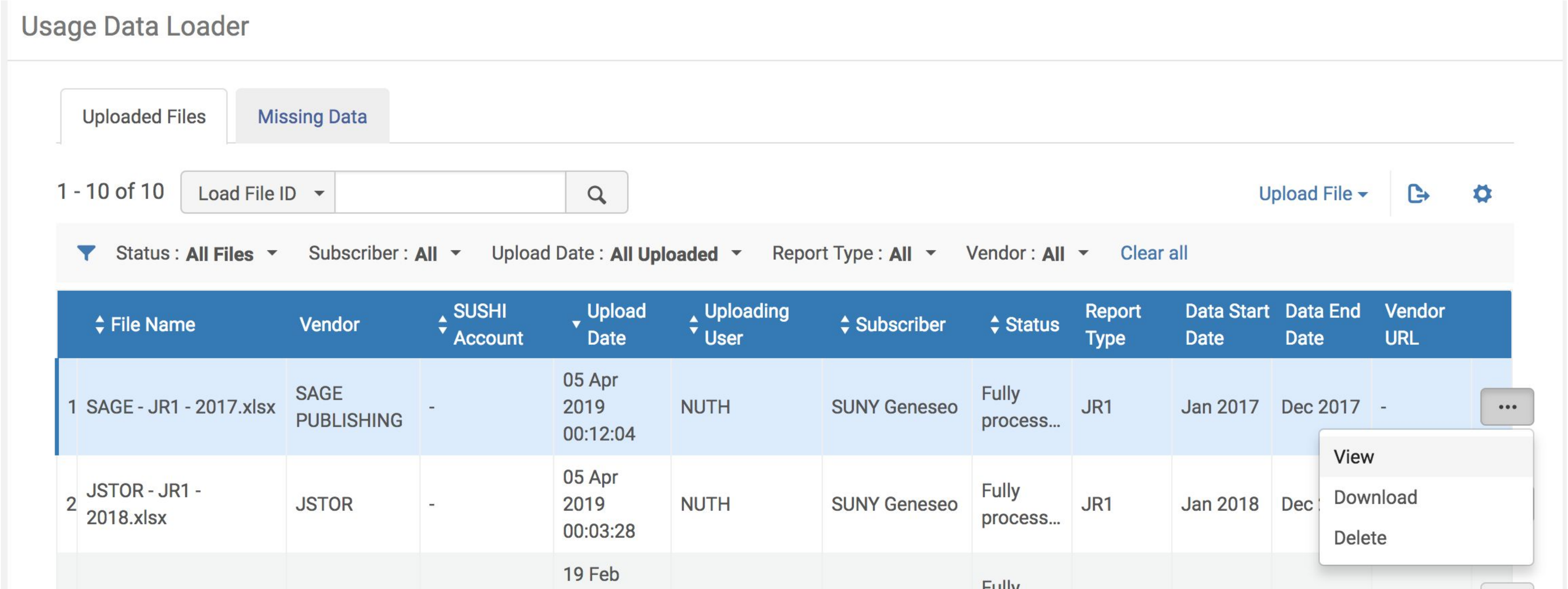
Upload Usage Data using Usage Data Loader



Usage data is uploaded in much the same way, using the button to Upload File. The only additional step is to select the vendor to which the report belongs so the correct vendor record is populated.



Files can be Viewed, Downloaded, and Deleted using the ellipses. The same Status, Report Type, Data Start Date, and Data End Date appear.



Missing Data

The Missing Data tab will inform you of any months which are missing data according to year.

Missing Data

Uploaded Files | Missing Data

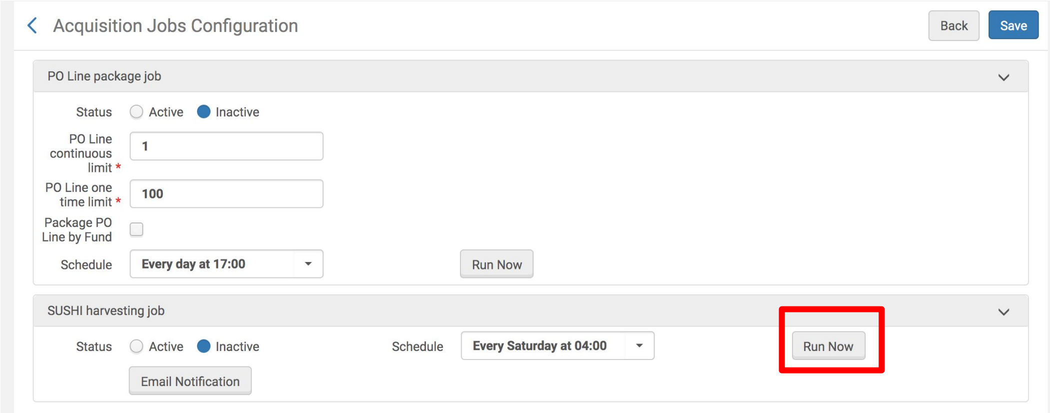
Year : **2018** Measured By : **All**

	Subscriber	Platform	Measured By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1	SUNY Geneseo	American Association for the Advancement of Science	JR1 - Record views	✓	✓	✓	✓	✓	✓	⚠	⚠	⚠	⚠	⚠	⚠
2	SUNY Geneseo	American Association for the Advancement of Science	JR2 - Access denied - content item not licensed	✓	✓	✓	✓	✓	✓	⚠	⚠	⚠	⚠	⚠	⚠
3	SUNY Geneseo	American Mathematical Society	JR1 - Record views	✓	✓	✓	✓	✓	✓	⚠	⚠	⚠	⚠	⚠	⚠

Set Up SUSHI Integration with Alma

A few comments about SUSHI accounts in Alma:

- SUSHI accounts are managed in the vendor record.
    - Vendor records will be maintained across cut-over, so any SUSHI set-up that you do before migration will persist.
- Legacy COUNTER reports will have to be manually uploaded to Alma.
- SUSHI harvesting jobs run weekly.
    - Once we're live, the harvesting job will run automatically between Friday evening and Saturday morning.
    - To run the job pre-migration, go to Configuration → Acquisitions → General → Acquisition Jobs Configuration → SUSHI Harvesting Job → Run Now



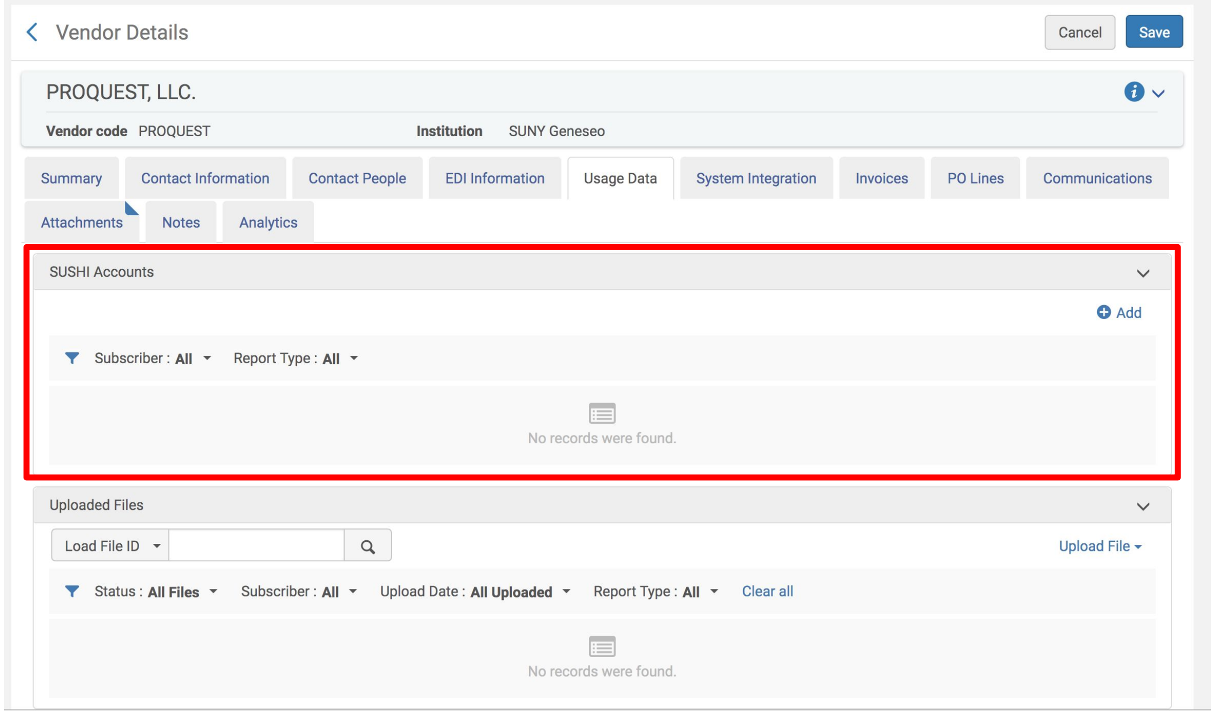
A few comments about SUSHI accounts in Alma:

- Each Alma site needs one Subscriber to set up SUSHI harvesting. If your site is not already configured with a Subscriber, see the following documentation:
    - *Configuring COUNTER Subscribers*, *Managing COUNTER-Compliant Usage Data*, *Ex Libris* https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/090Acquisitions_Infrastructure/010Managing_Vendors/Managing_COUNTER-Compliant_Usage_Data

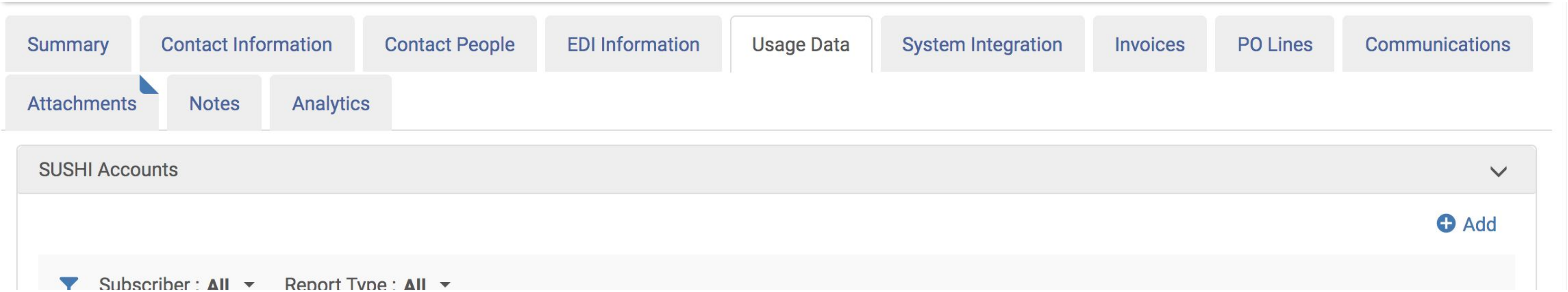
- A SUSHI account will need to be created for each vendor from which your library is harvesting usage statistics.
    - Each report type needs its own SUSHI account, so it's very likely that your library will have multiple SUSHI accounts for a single vendor to accommodate the harvesting of multiple COUNTER report types.

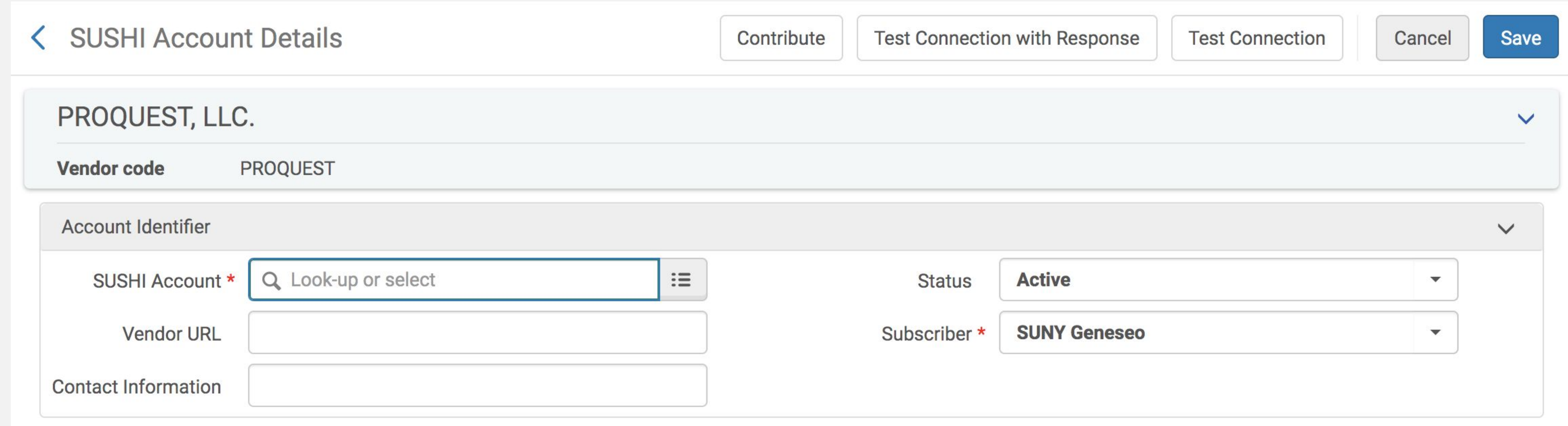
SUSHI Account Set Up

Acquisitions → Vendors
Select the desired vendor and navigate to the Usage Data tab in the vendor record



Click Add to create a new SUSHI account for the vendor and input the required SUSHI account information.



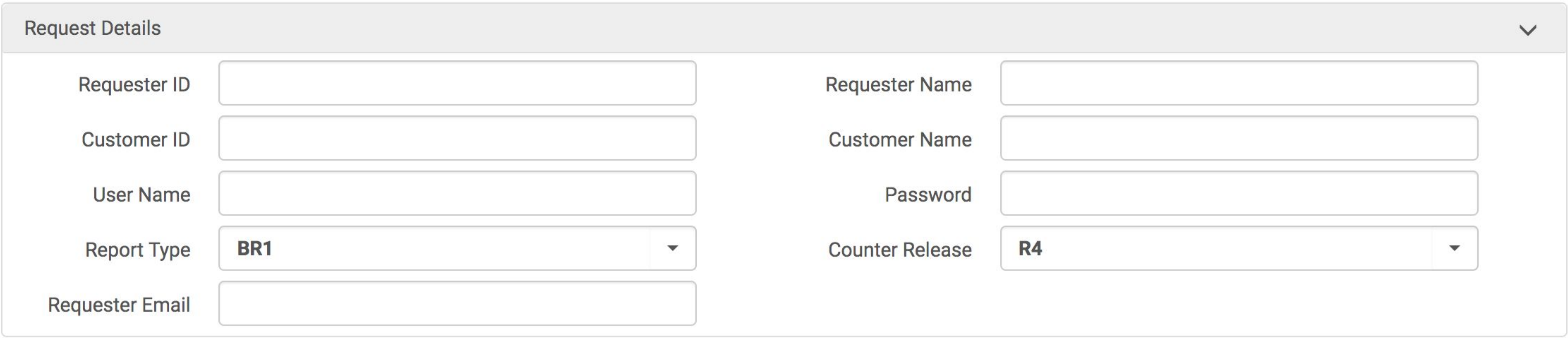


SUSHI Account and Vendor URL:

Use the drop-down to select the desired vendor. By using the community list, the Vendor URL will automatically populate. If your desired vendor is not on the list, manually enter the vendor name in the SUSHI Account field and vendor URL in the Vendor URL field. (The vendor URL can be found on the Project COUNTER website by looking under the Registries of Compliance, vendor admin site, or by contacting the vendor directly.)

Status: Active

Subscriber: If not automatically populated, this field will have to be configured. The Subscriber is the institution.



Requestor ID, Requestor Name, Customer ID, Customer Name, Username and Password:

These fields are local to the institution and the required information can be requested from the vendor or found on the vendor admin site.

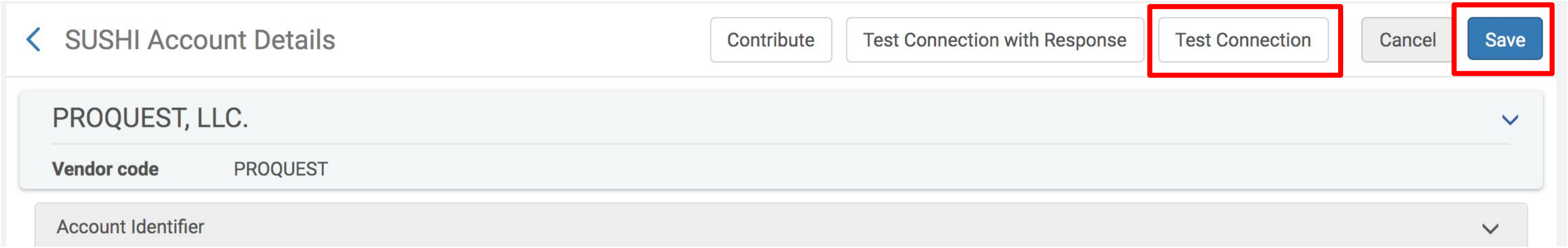
Report Type and COUNTER Release:

Select the desired COUNTER report type and release

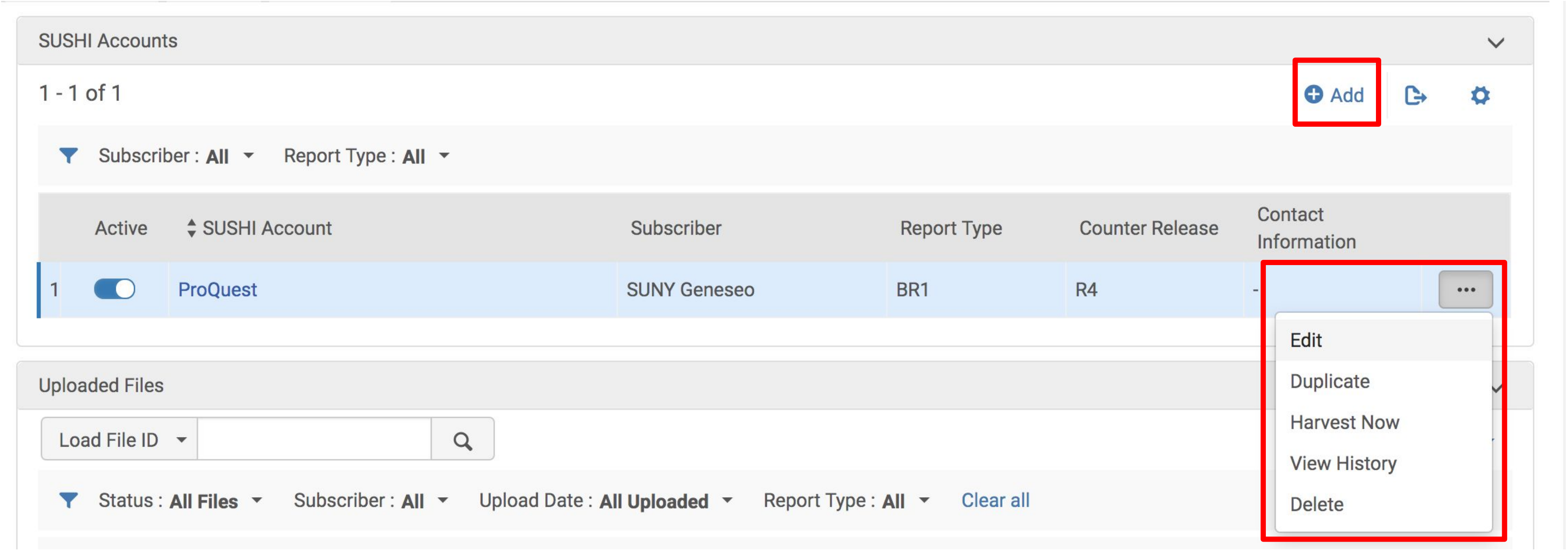
Requestor Email:

Your email or the person responsible for harvesting usage statistics

When all the required information is entered, click the Test Connection button to verify a successful set up.
Once the connection has been established, click Save.



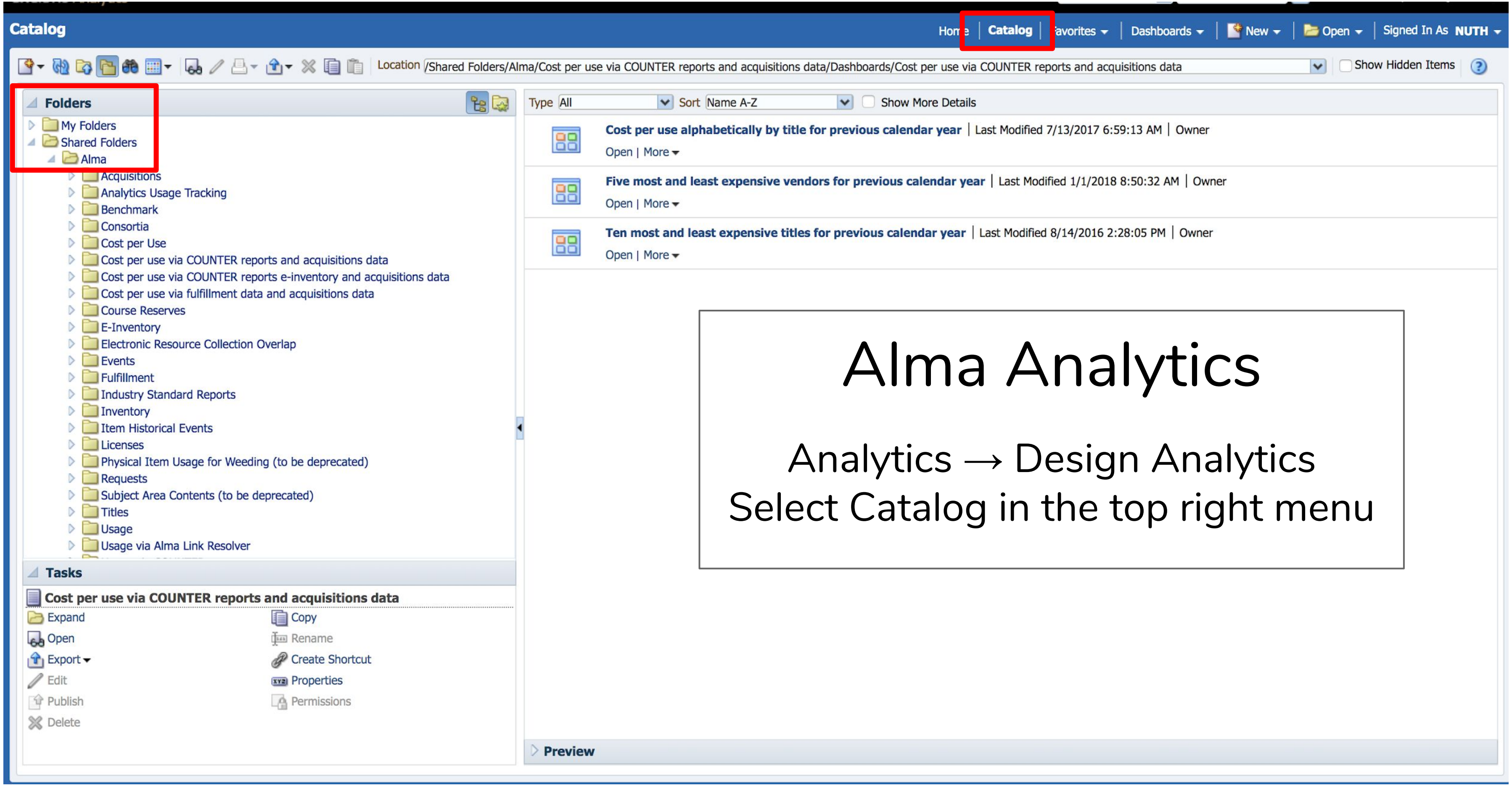
Once the SUSHI account is saved, it will appear in the SUSHI Accounts section of the vendor record.
Click Add to create a new SUSHI Account.
Use the ellipses to Edit, Duplicate, Harvest Now, or Delete



Quick Overview of Analytics

Taking a closer look at Analytics

Leveraging Alma Analytics to generate reports and graphs of usage data can save time and effort, as many of us were analyzing our usage data externally from any system in Excel.

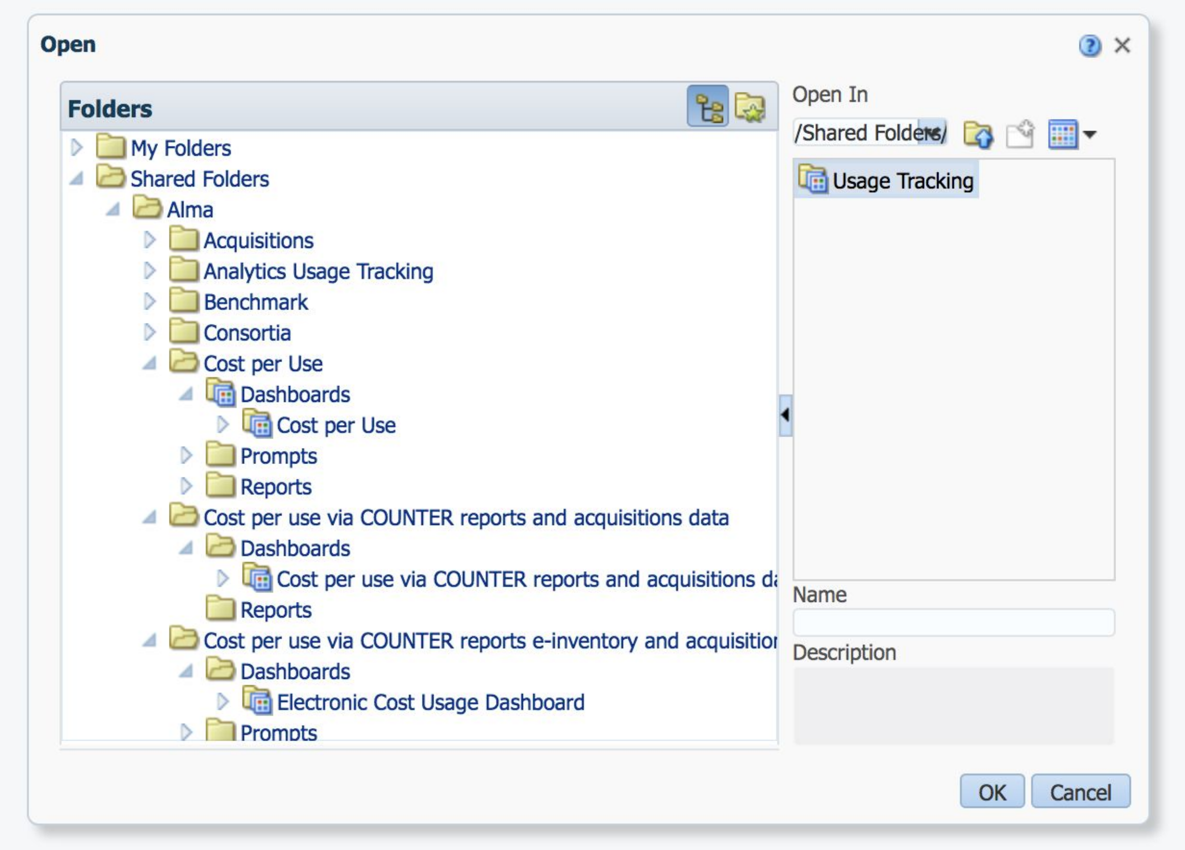


Alma Analytics

Analytics → Design Analytics

Select Catalog in the top right menu

Available Dashboards and Reports



- Cost per Use
- Cost per use via COUNTER reports and acquisitions data
- Cost per use via COUNTER reports e-inventory and acquisitions data (Electronic Cost Usage Dashboard)
- Electronic Resource Collection Overlap
    - *this topic will be covered in the April 18 session with Ex Libris*
- Usage via COUNTER reports

Cost per use via COUNTER reports e-inventory and acquisitions data:

- Continuous
- Dewey Subjects
- Electronic collections
- Funds
- LC Subjects
- Match Points
- One-time
- Platform
- Resource Types
- Title details
- Titles
- Titles with multiple portfolios
- Usage by title per electronic collection
- Usage types
- Vendors

Cost per use via COUNTER reports and acquisitions data:

- Cost per use alphabetically by title for previous calendar year
- Five most and least expensive vendors for previous calendar year
- Ten most and least expensive vendors for previous calendar year

E-Inventory

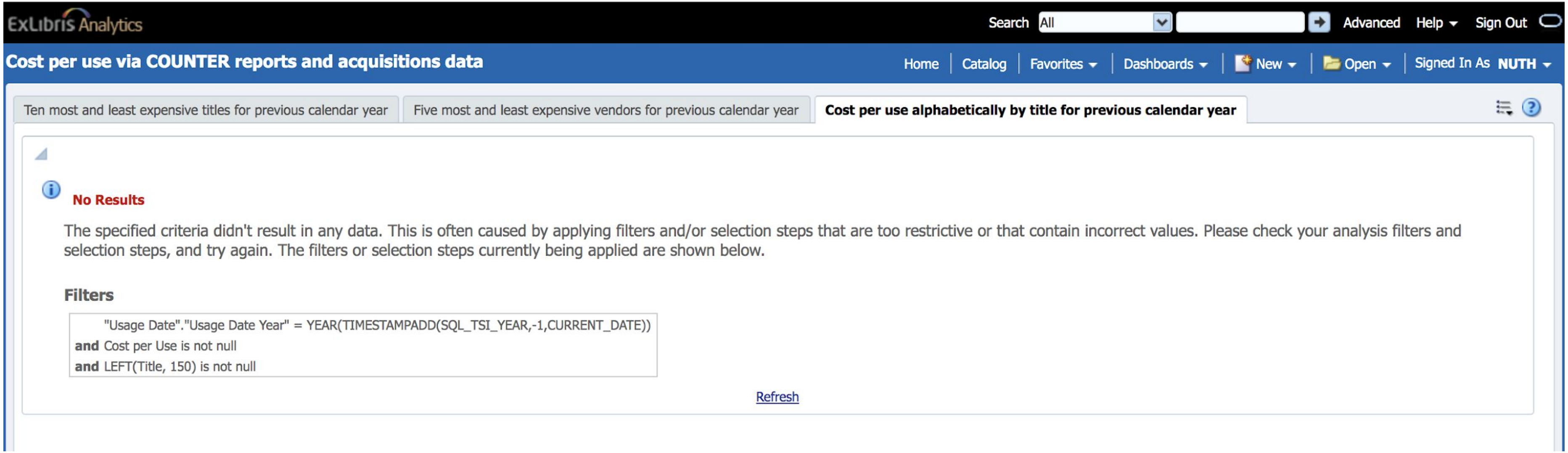
- Available electronic resources
- Classifications
- Newly activated portfolios and collections
- Packages

Electronic Resource Collection Overlap

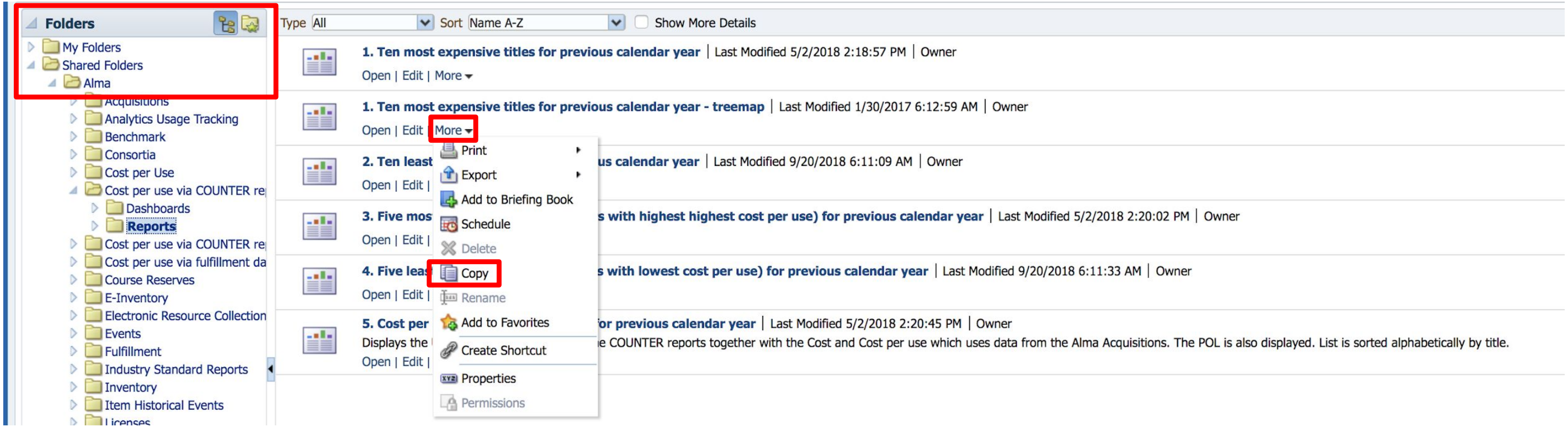
- Active portfolios in multiple collections
- Active portfolios in multiple collections with prompt for number of collections

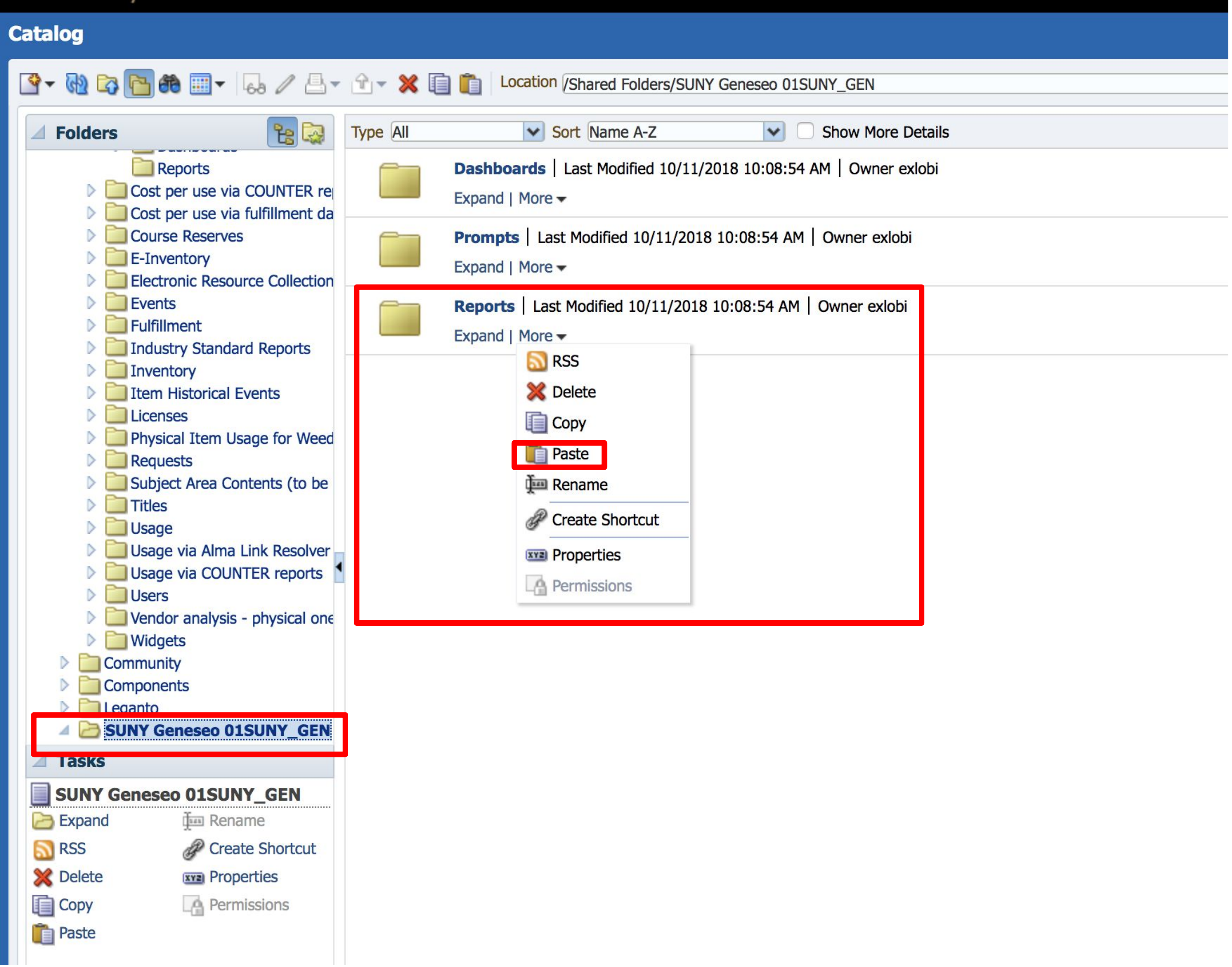
Out of the Box Reports from Alma Analytics

- To use one of these out of the box reports, you'll need to first copy the report from the shared folder and paste it into your local institutional folder. (Screenshot on next slide)
- If we open some of these reports, the report will generate no results as we do not have acquisitions or COUNTER reports for the previous calendar year. (Screenshot below)



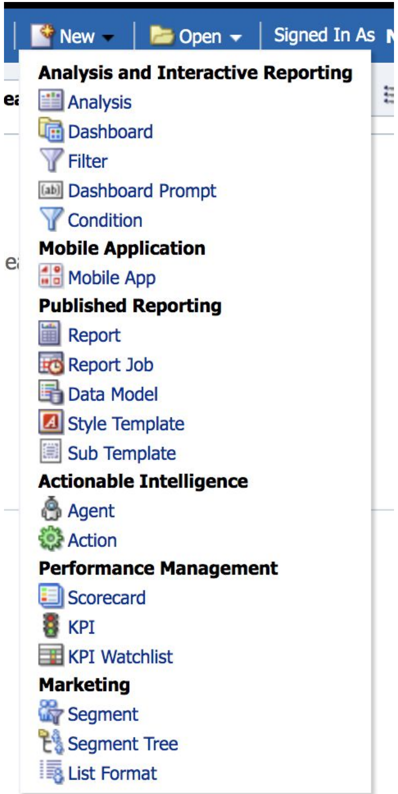
Copy the report from the Shared Alma folder to your local institutional folder: Select More → Copy





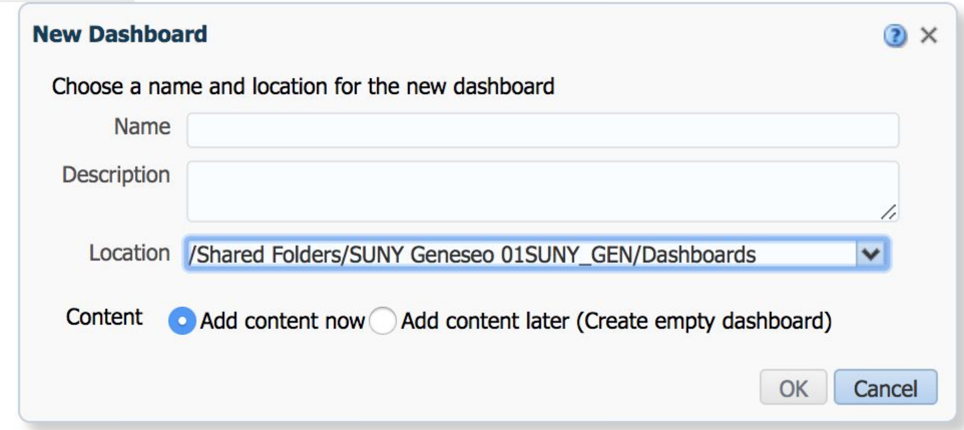
Open your local institutional folder's reports, and Select More and Paste to paste a copy of the shared folder report into your local folder.

Create a New Dashboard

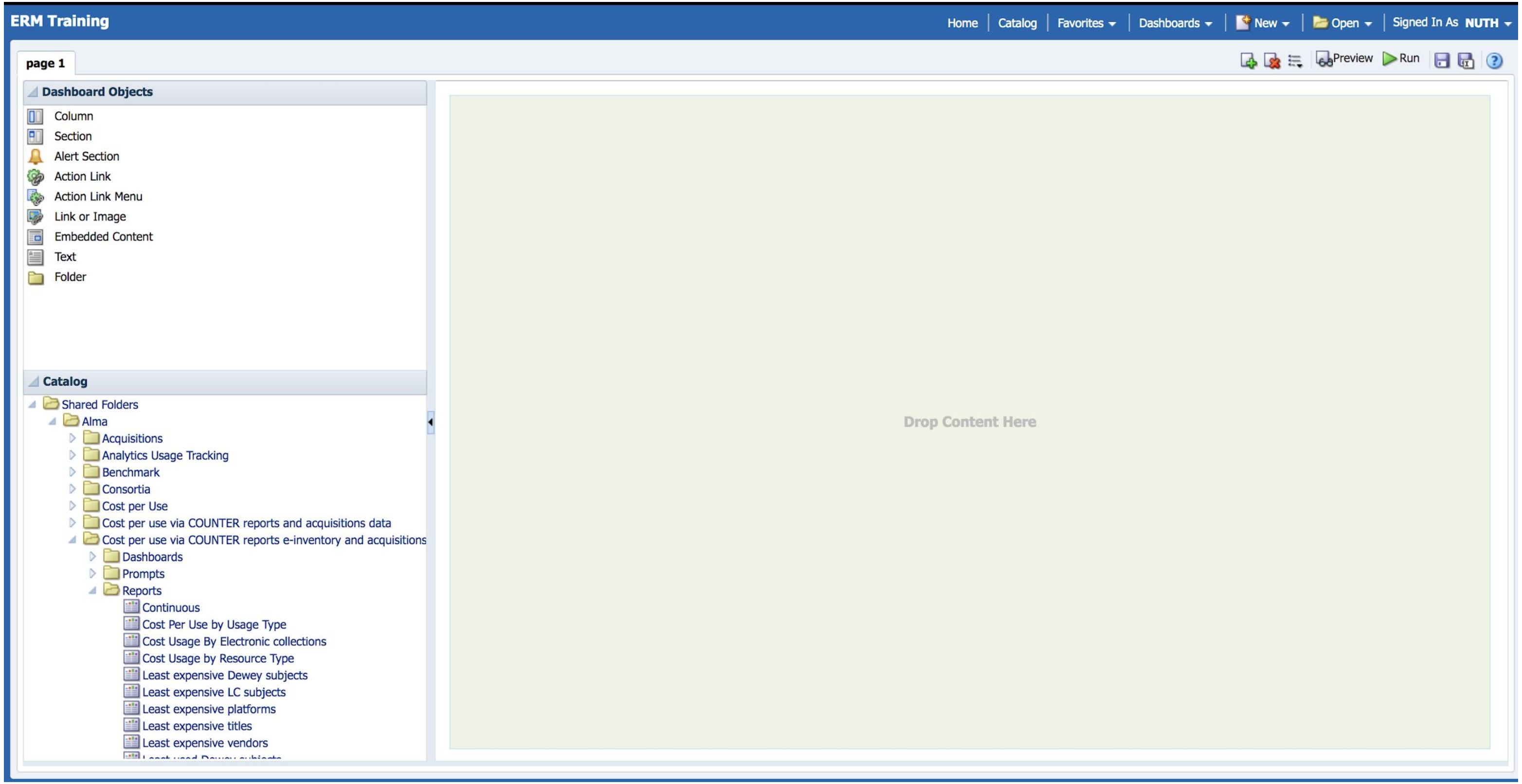


New → Dashboard
Enter Name and Description
Select desired Location (local institutional folder)
Content: add now or later
Click Ok

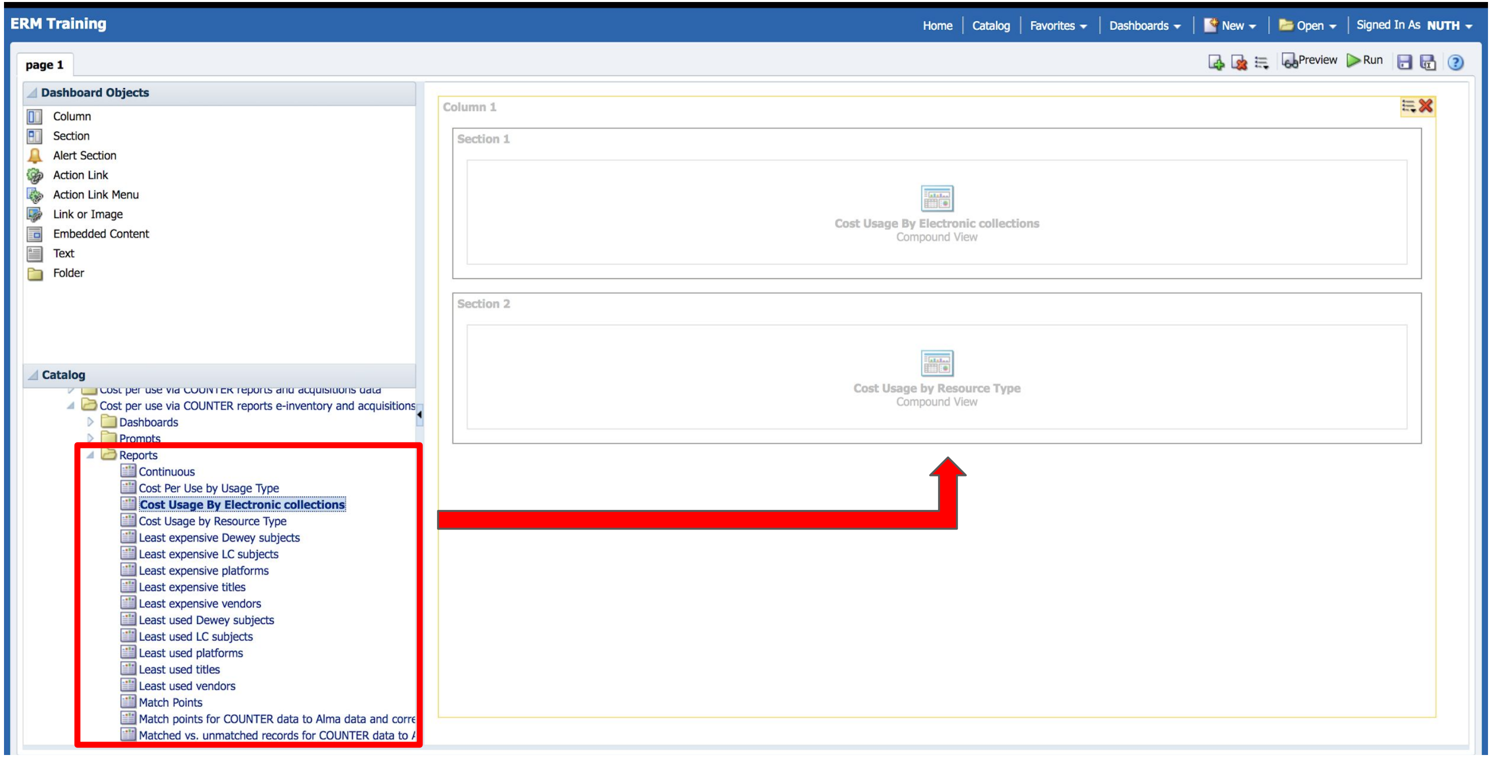
Creating a New Dashboard, Ex Libris
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction/The_Basics_of_Working_with_Analytics/060Creating_a_Dashboard

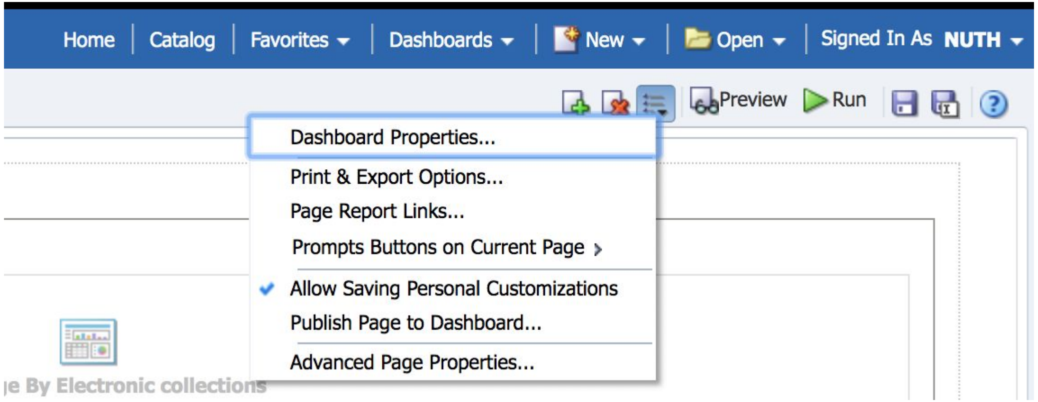


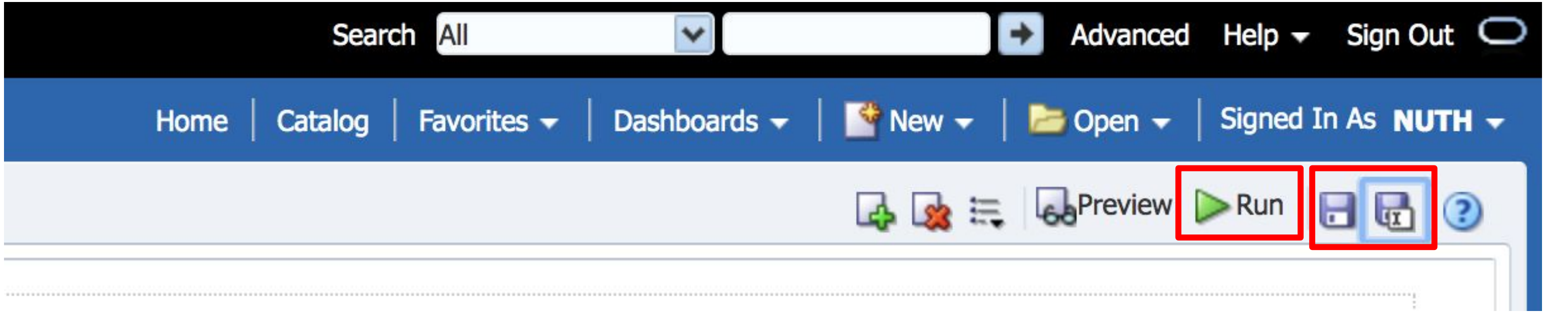
If you selected Add Content Now…



Reports from the Catalog can be dragged and dropped into the new dashboard:

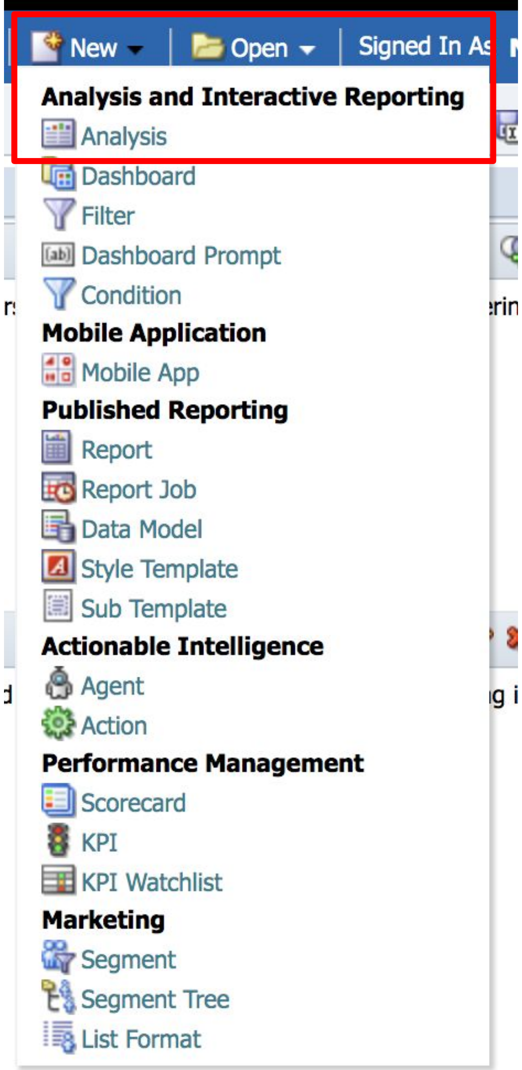



Home
Catalog
Favorites
Dashboards
New
Open
Signed In As NUTH
Preview
Run
Dashboard Properties...
Print & Export Options...
Page Report Links...
Prompts Buttons on Current Page
Allow Saving Personal Customizations
Publish Page to Dashboard...
Advanced Page Properties...
ge By Electronic collections

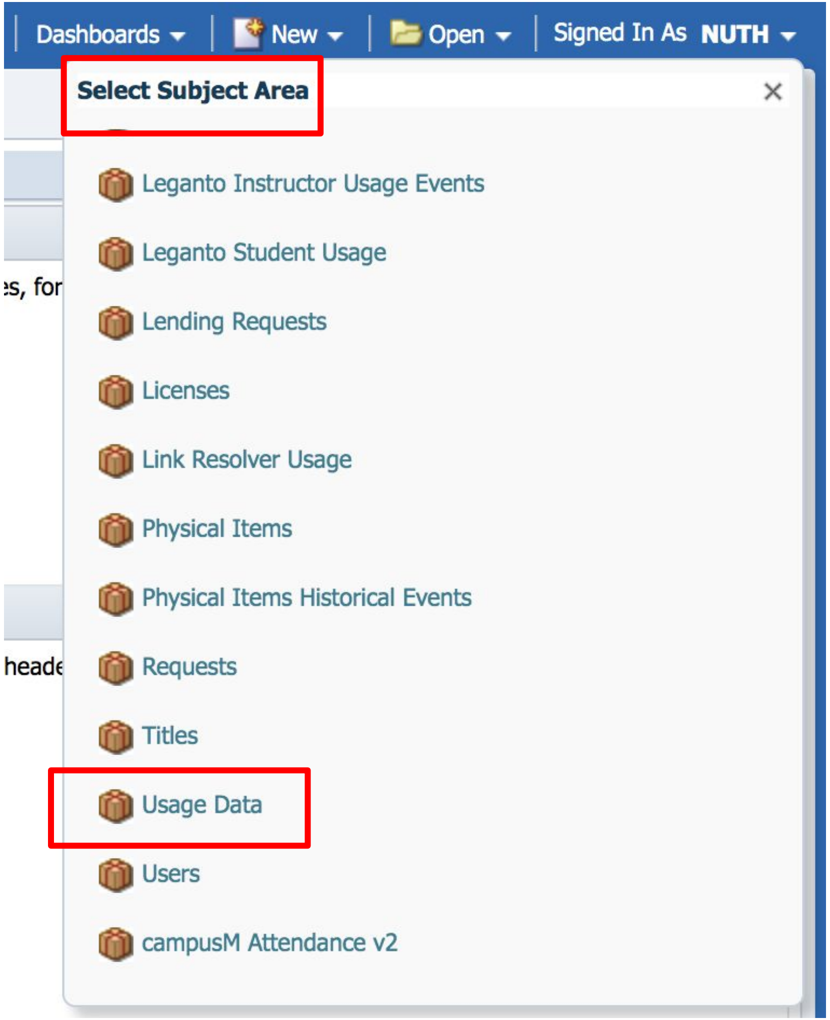

Search
All
Advanced
Help
Sign Out
Home
Catalog
Favorites
Dashboards
New
Open
Signed In As NUTH
Preview
Run

Create a New Report

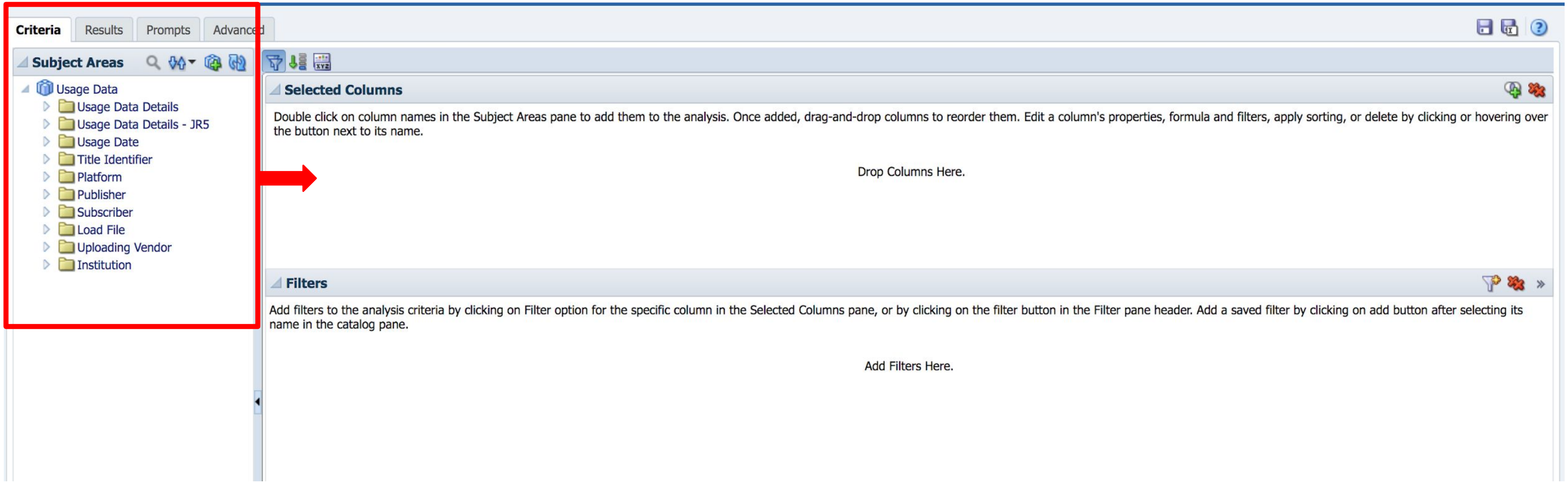
New → Analysis and Interactive Report → Analysis



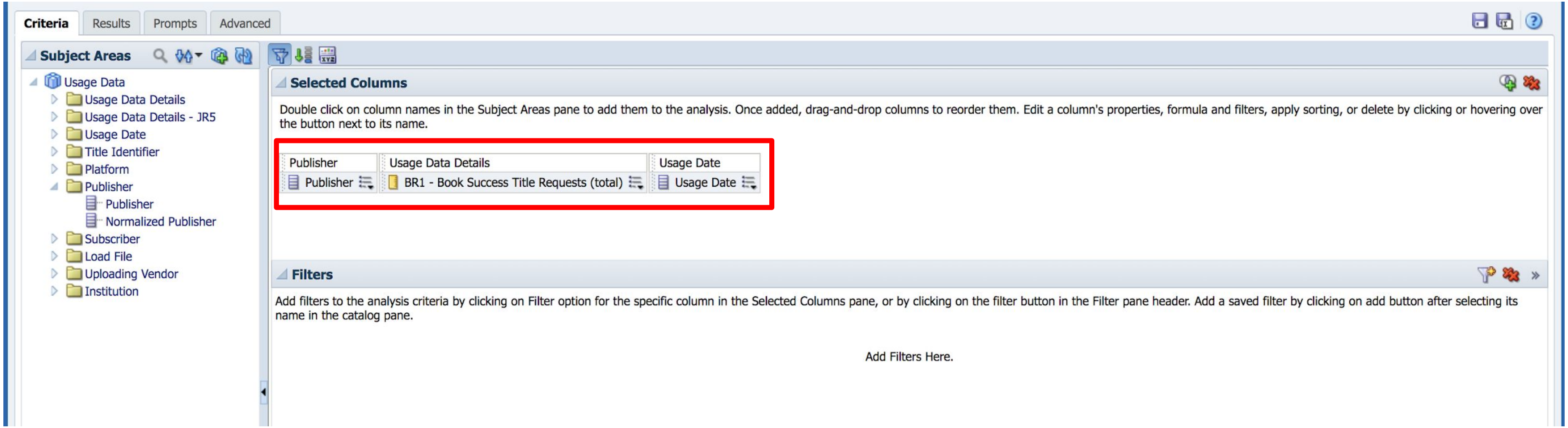
Select Subject Area (Usage Data)



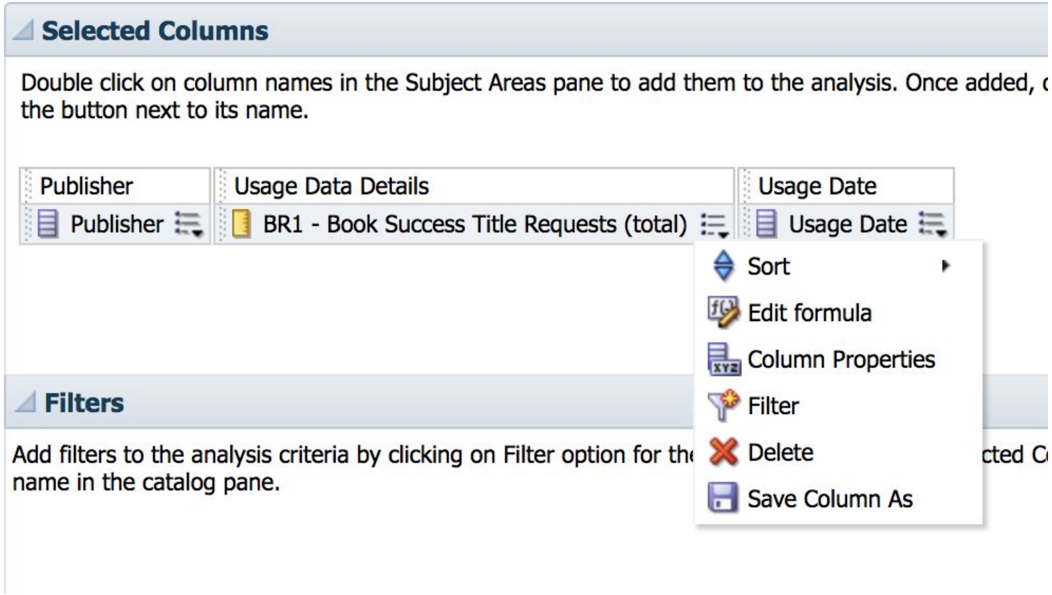
Drag and drop Criteria from the Subject Areas into the Analysis

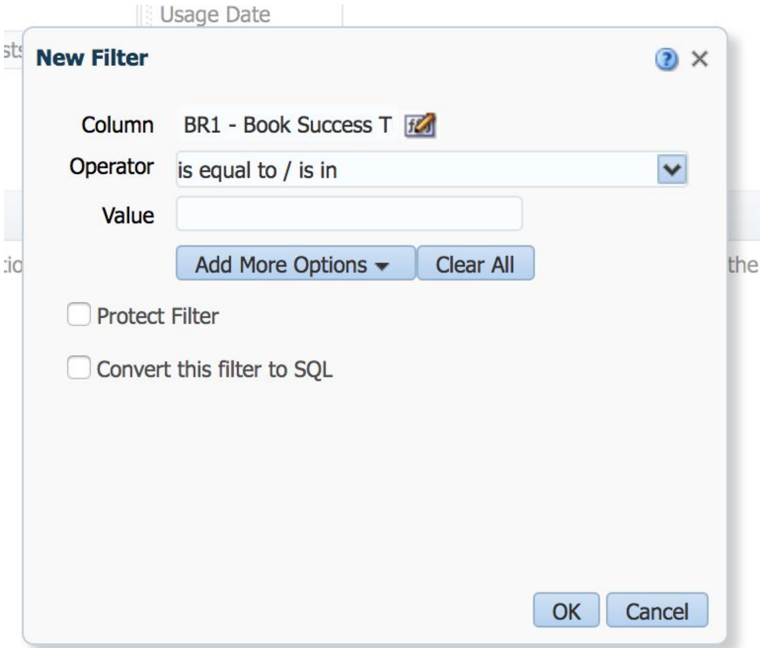


Drag and drop the selected criteria into the desired column order

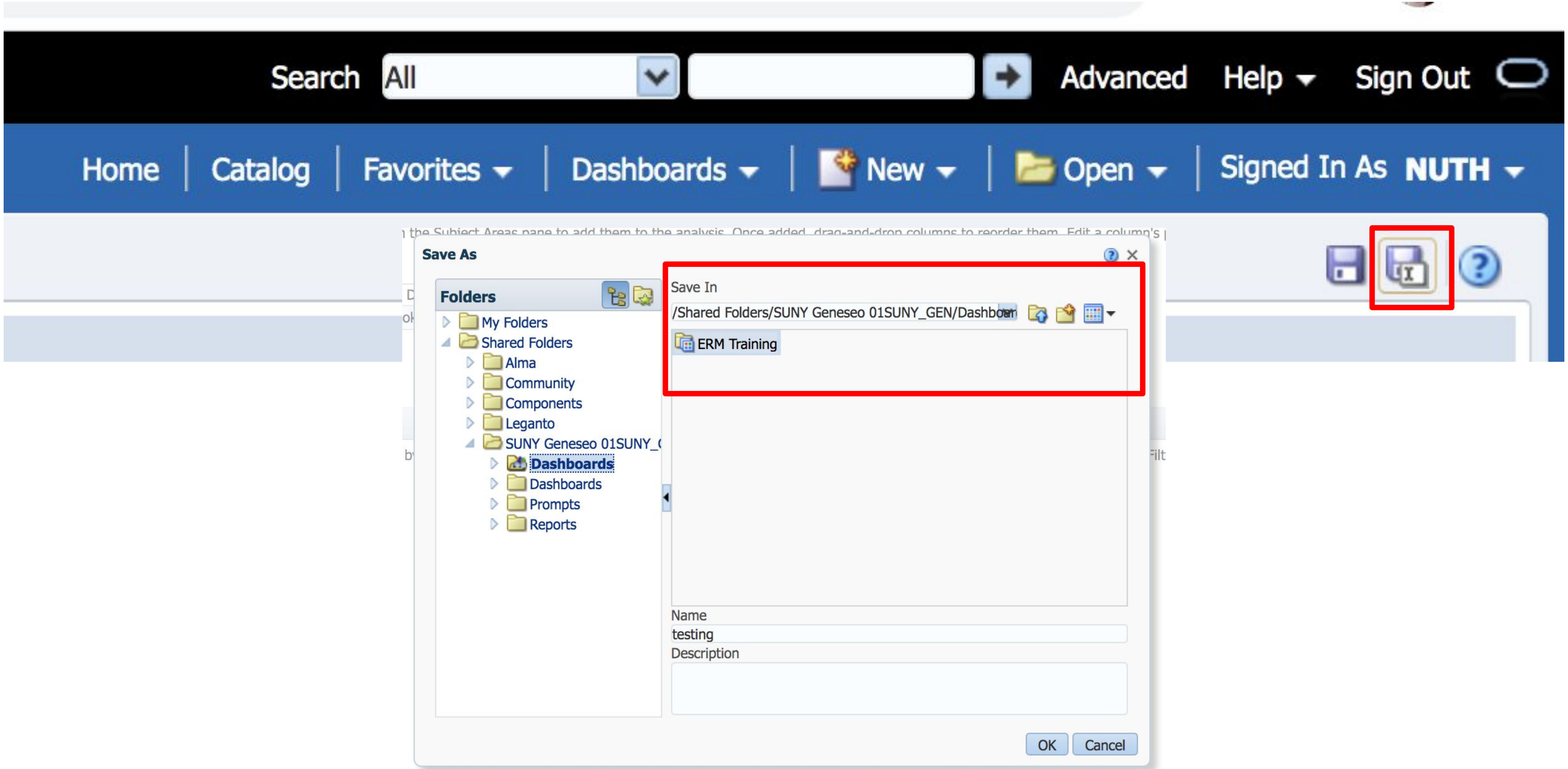


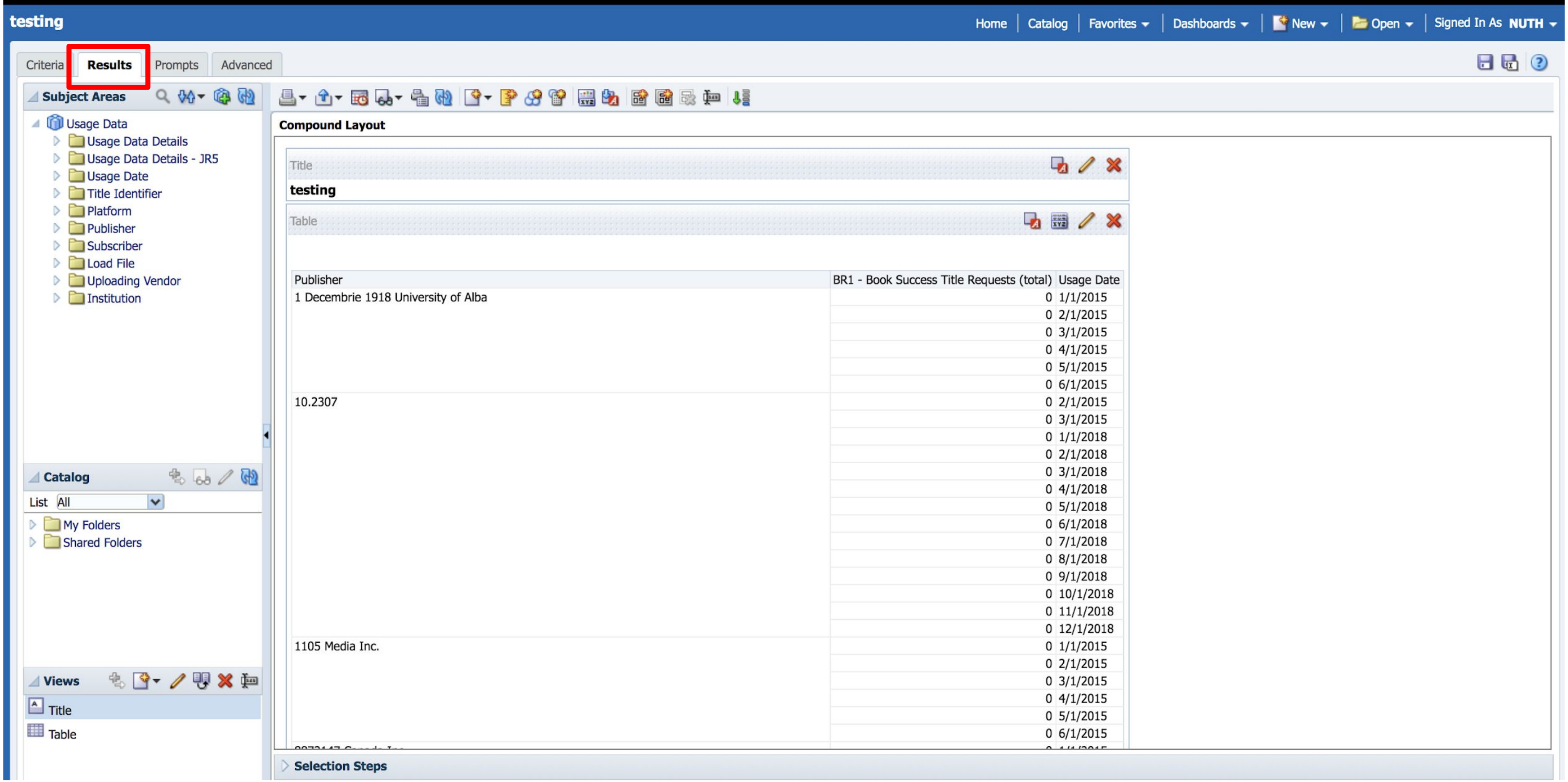
Apply filters to each criteria as needed:





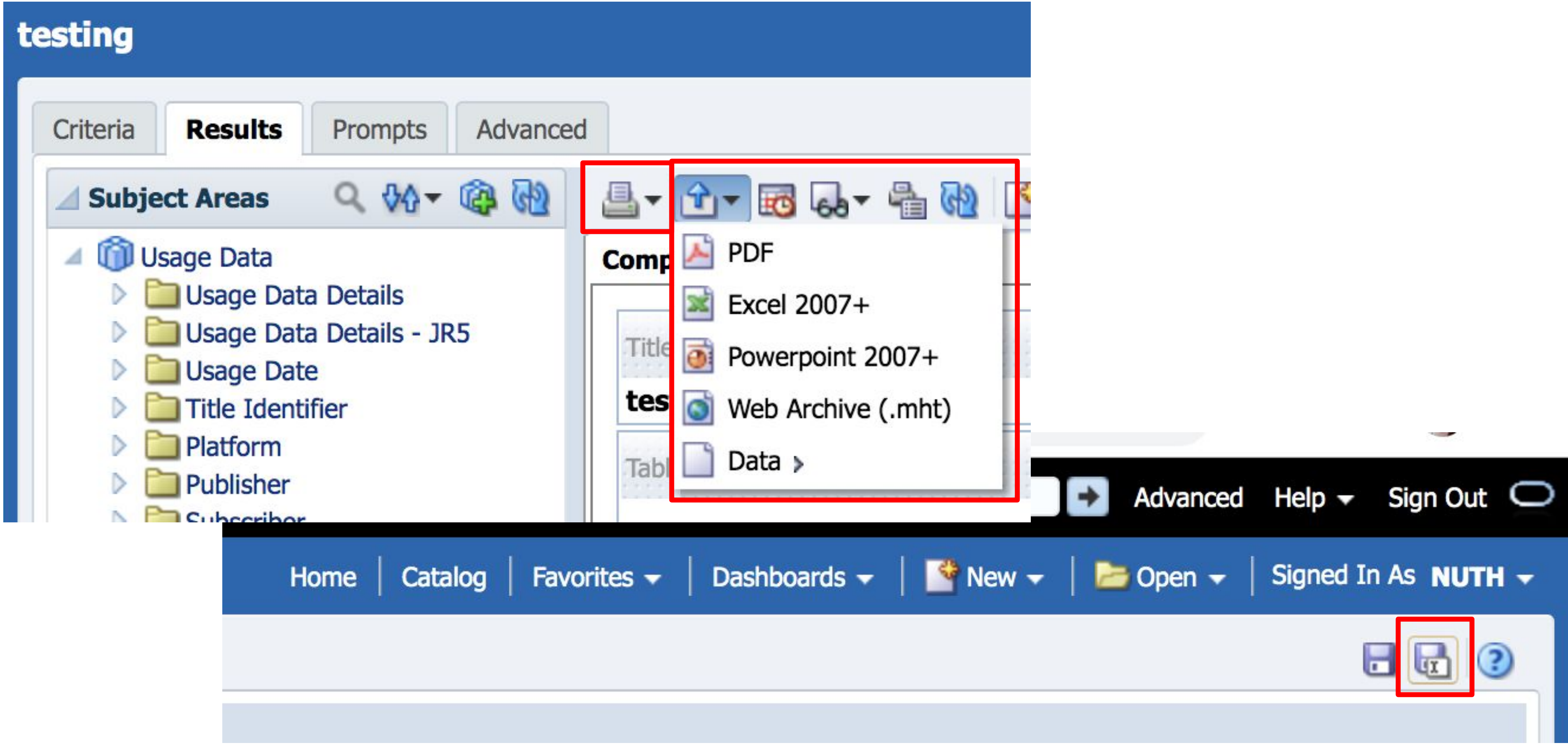
When finished building the new analysis, click Save As and be sure to save the analysis in the local, institutional folder and new dashboard.





After saving the analysis, click on the Results tab to view results.

Results can be printed, exported, or saved



Relevant Ex Libris Documentation for Analytics

Running Analytics Reports and Displaying Them in Alma
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/040Scheduling

Creating a Dashboard
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction/The_Basics_of_Working_with_Analytics/060Creating_a_Dashboard

Creating a New Report
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction/The_Basics_of_Working_with_Analytics/050Creating_a_New_Report

Usage Data
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/Alma_Analytics_Subject_Areas/Usage_Data

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