

# ERM Training for Alma

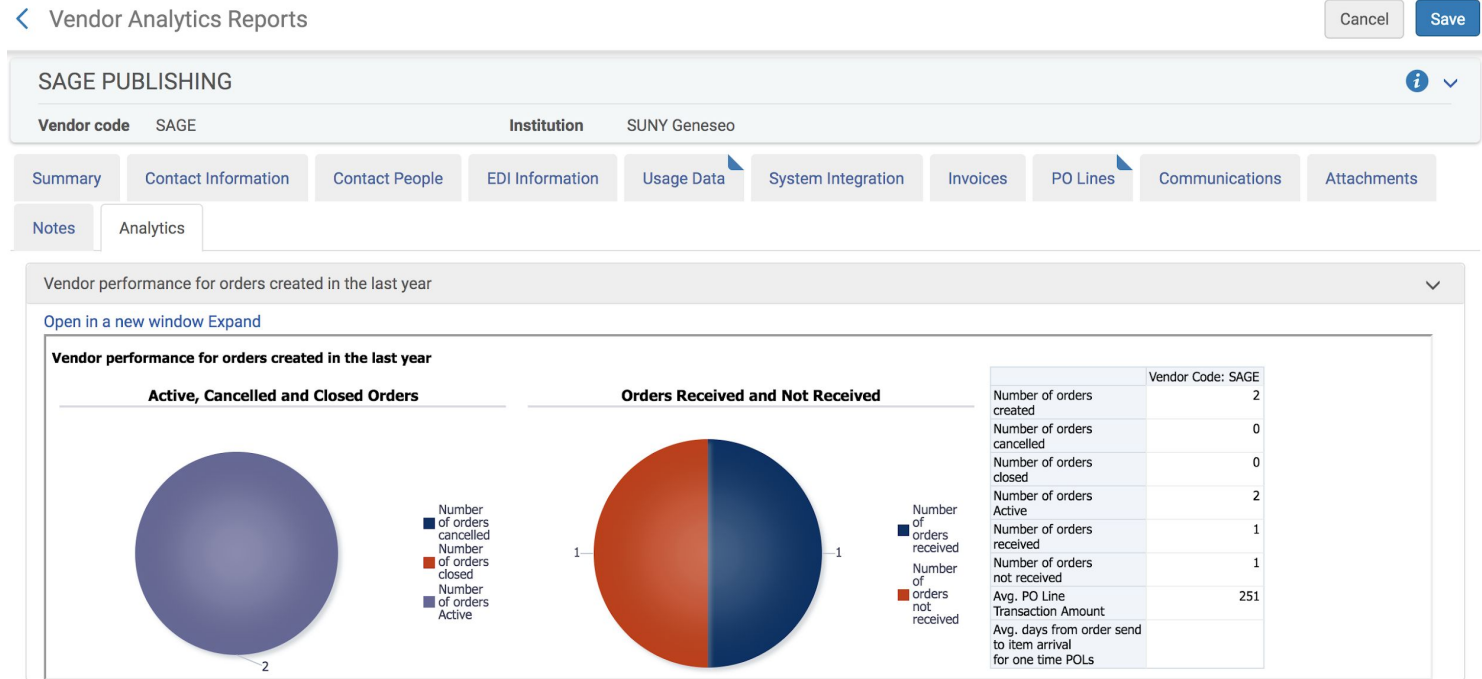
Session 7:  
Electronic Resources Usage Statistics:  
COUNTER & SUSHI

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](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

Vendor Details Cancel Save

JSTOR i v

Vendor code JSTOR Institution SUNY Geneseo

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

Attachments Notes Analytics

SUSHI Accounts v

+ Add

Subscriber: All Report Type: All

No records were found.

Uploaded Files v

1 - 1 of 1 Load File ID Q Upload File 📄 ⚙️

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	Data End Date	Vendor URL
JSTOR - JR1 - 2018.xlsx	-	05 Apr 2019 00:03:28	NUTH	SUNY Geneseo	Fully processed	JR1	Jan 2018	Dec 2018	-

# 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

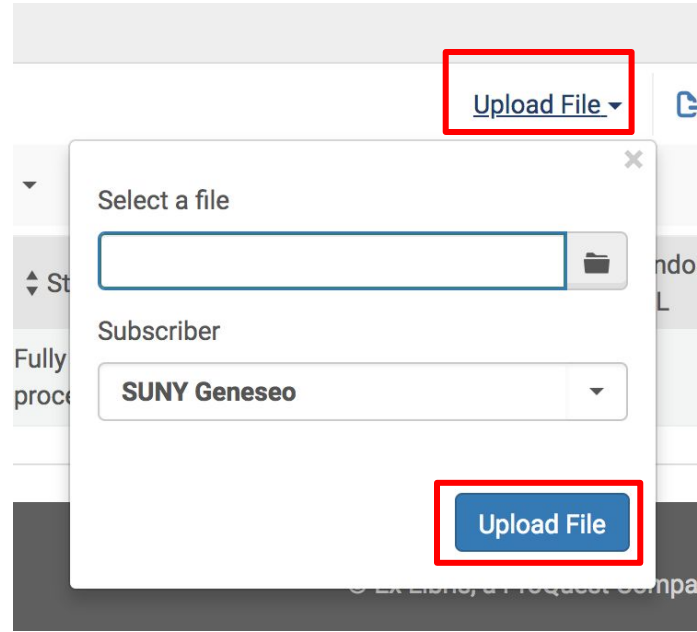
The screenshot displays a vendor record interface with several tabs. The 'Usage Data' tab is highlighted with a red box. Below the tabs, there is a section for 'SUSHI Accounts' with a search filter and a message 'No records were found.' Below that, the 'Uploaded Files' section is also highlighted with a red box. It contains a search bar, a table of uploaded files, and a 'Clear all' link.

File Name	SUSHI Account	Upload Date	Uploading User	Subscriber	Status	Report Type	Data Start Date	Data End Date	Vendor URL
SAGE - JR1 - 2017.xlsx	-	05 Apr 2019 00:12:04	NUTH	SUNY Geneseo	Fully processed	JR1	Jan 2017	Dec 2017	-

- 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](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.

Uploaded Files

1 - 1 of 1

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	Data End Date	Vendor URL
SAGE - JR1 - 2017.xlsx	-	05 Apr 2019 00:12:04	NUTH	SUNY Geneseo	Fully processed	JR1	Jan 2017	Dec 2017	-

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

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

Uploaded Files

1 - 1 of 1   Upload File

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	Data End Date	Vendor URL	
SAGE - JR1 - 2017.xlsx	-	05 Apr 2019 00:12:04	NUTH	SUNY Geneseo	Fully processed	JR1	Jan 2017	Dec 2017	-	...

View

Download

Delete

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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 code KANOPY

Institution SUNY Geneseo

Summary Contact Information Contact People EDI Information Usage Data Invoices PO Lines Communicat

Notes Analytics

SUSHI Accounts

Subscriber : All Report Type : All

No records were found.

Uploaded Files

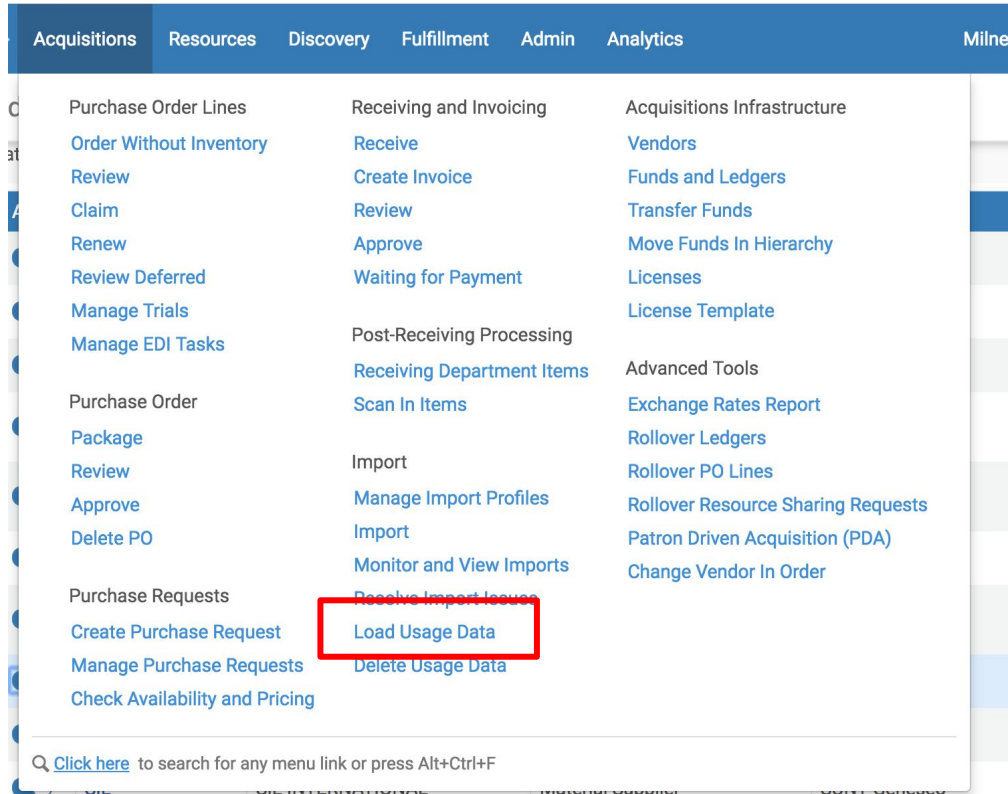
1 - 1 of 1 Load File ID

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.

# Upload Usage Data using Usage Data Loader



The image shows a screenshot of a software application's menu system. The top navigation bar is blue and contains the following tabs: Acquisitions, Resources, Discovery, Fulfillment, Admin, Analytics, and Milne. The 'Acquisitions' tab is currently selected. Below the navigation bar, a dropdown menu is open, displaying a list of options organized into three columns. The option 'Load Usage Data' is highlighted with a red rectangular box. At the bottom of the menu, there is a search bar with the text 'Click here to search for any menu link or press Alt+Ctrl+F'.

Acquisitions	Resources	Discovery	Fulfillment	Admin	Analytics	Milne
Purchase Order Lines		Receiving and Invoicing		Acquisitions Infrastructure		
<a href="#">Order Without Inventory</a>		<a href="#">Receive</a>		<a href="#">Vendors</a>		
<a href="#">Review</a>		<a href="#">Create Invoice</a>		<a href="#">Funds and Ledgers</a>		
<a href="#">Claim</a>		<a href="#">Review</a>		<a href="#">Transfer Funds</a>		
<a href="#">Renew</a>		<a href="#">Approve</a>		<a href="#">Move Funds In Hierarchy</a>		
<a href="#">Review Deferred</a>		<a href="#">Waiting for Payment</a>		<a href="#">Licenses</a>		
<a href="#">Manage Trials</a>				<a href="#">License Template</a>		
<a href="#">Manage EDI Tasks</a>		Post-Receiving Processing		<a href="#">Advanced Tools</a>		
		<a href="#">Receiving Department Items</a>		<a href="#">Exchange Rates Report</a>		
Purchase Order		<a href="#">Scan In Items</a>		<a href="#">Rollover Ledgers</a>		
Package		Import		<a href="#">Rollover PO Lines</a>		
Review		<a href="#">Manage Import Profiles</a>		<a href="#">Rollover Resource Sharing Requests</a>		
Approve		Import		<a href="#">Patron Driven Acquisition (PDA)</a>		
Delete PO		<a href="#">Monitor and View Imports</a>		<a href="#">Change Vendor In Order</a>		
Purchase Requests		<a href="#">Resolve Import Issues</a>				
<a href="#">Create Purchase Request</a>		<a href="#">Load Usage Data</a>				
<a href="#">Manage Purchase Requests</a>		<a href="#">Delete Usage Data</a>				
<a href="#">Check Availability and Pricing</a>						

Q [Click here](#) to search for any menu link or press Alt+Ctrl+F

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.

Usage Data Loader

Uploaded Files Missing Data

1 - 10 of 10 Load File ID

Status: All Files Subscriber: All Upload Date: All Uploaded Report Type: All

File Name	Vendor	SUSHI Account	Upload Date	Uploading User	Subscriber
1 SAGE - JR1 - 2017.xlsx	SAGE PUBLISHING	-	05 Apr 2019 00:12:04	NUTH	SUNY Genesee
2 JSTOR - JR1 - 2018.xlsx	JSTOR	-	05 Apr 2019 00:03:28	NUTH	SUNY Genesee
3 SAGE - JR1 - 2017.xlsx	KANOPY	-	19 Feb 2019 16:41:44	NUTH	SUNY Genesee

Upload File

Vendor \*

Subscriber \*

Upload File



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

## Usage Data Loader

Uploaded Files

Missing Data

1 - 10 of 10

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
1 SAGE - JR1 - 2017.xlsx	SAGE PUBLISHING	-	05 Apr 2019 00:12:04	NUTH	SUNY Geneseo	Fully process...	JR1	Jan 2017	Dec 2017	-
2 JSTOR - JR1 - 2018.xlsx	JSTOR	-	05 Apr 2019 00:03:28	NUTH	SUNY Geneseo	Fully process...	JR1	Jan 2018	Dec	
			19 Feb			Fully				

View  
Download  
Delete

# 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

The screenshot shows the 'Acquisition Jobs Configuration' page in Alma. It is divided into two main sections: 'PO Line package job' and 'SUSHI harvesting job'. The 'SUSHI harvesting job' section is highlighted with a red box around the 'Run Now' button.

**PO Line package job**

- Status:  Active  Inactive
- PO Line continuous limit:
- PO Line one time limit:
- Package PO Line by Fund:
- Schedule:

**SUSHI harvesting job**

- Status:  Active  Inactive
- Schedule:
-

# 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](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

The screenshot displays the 'Vendor Details' page for 'PROQUEST, LLC.' The page includes a header with 'Cancel' and 'Save' buttons. Below the vendor name, the 'Vendor code' is 'PROQUEST' and the 'Institution' is 'SUNY Geneseo'. A navigation bar contains tabs for 'Summary', 'Contact Information', 'Contact People', 'EDI Information', 'Usage Data', 'System Integration', 'Invoices', 'PO Lines', and 'Communications'. The 'Usage Data' tab is selected. Below the tabs, there are sections for 'Attachments', 'Notes', and 'Analytics'. The 'SUSHI Accounts' section is highlighted with a red border and contains a dropdown menu, an 'Add' button, and filters for 'Subscriber: All' and 'Report Type: All'. Below these filters, a message states 'No records were found.' The 'Uploaded Files' section below it also has a search bar, filters for 'Status: All Files', 'Subscriber: All', 'Upload Date: All Uploaded', and 'Report Type: All', and a 'Clear all' button. A message at the bottom of this section also states 'No records were found.'

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

The screenshot displays a software interface with a horizontal navigation bar at the top. The tabs in the navigation bar are: Summary, Contact Information, Contact People, EDI Information, Usage Data, System Integration, Invoices, PO Lines, Communications, Attachments, Notes, and Analytics. Below the navigation bar is a section titled "SUSHI Accounts" with a dropdown arrow on the right. In the bottom right corner of this section is a blue circular button with a white plus sign and the text "Add". Below the "SUSHI Accounts" section is a filter bar containing two dropdown menus: "Subscriber : All" and "Report Type : All".

PROQUEST, LLC. ▼

Vendor code PROQUEST

Account Identifier ▼

SUSHI Account \*

🔍 Look-up or select



Status

Active ▼

Vendor URL

Subscriber \*

SUNY Geneseo ▼

Contact 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.



## Request Details



Requester ID

Requester Name

Customer ID

Customer Name

User Name

Password

Report Type

**BR1**



Counter Release

**R4**



Requester Email

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:

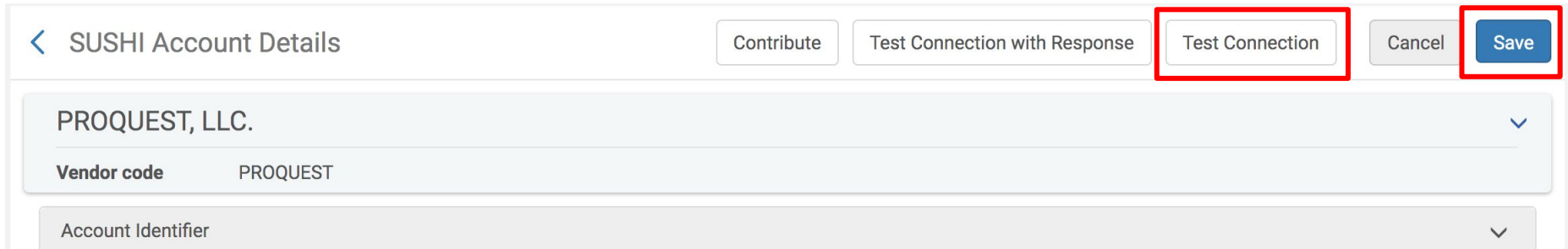
Select the desired COUNTER report type and release

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.



The screenshot shows a web interface for 'SUSHI Account Details'. At the top left is a back arrow and the text 'SUSHI Account Details'. To the right are five buttons: 'Contribute', 'Test Connection with Response', 'Test Connection', 'Cancel', and 'Save'. The 'Test Connection' and 'Save' buttons are highlighted with red boxes. Below the buttons is a light blue section containing the text 'PROQUEST, LLC.' with a dropdown arrow on the right. Underneath this is a table with two columns: 'Vendor code' and 'PROQUEST'. At the bottom is a grey section with the text 'Account Identifier' and a dropdown arrow on the right.

Vendor code	PROQUEST
Account Identifier	

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

The screenshot displays the 'SUSHI Accounts' section of a vendor record. At the top, it shows '1 - 1 of 1' and a '+ Add' button. Below this are filter options for 'Subscriber' and 'Report Type'. A table lists the account details, including an 'Active' toggle, 'SUSHI Account' name, 'Subscriber', 'Report Type', and 'Counter Release'. A context menu is open over the first row, listing actions: Edit, Duplicate, Harvest Now, View History, and Delete. Below the table is the 'Uploaded Files' section with a search bar and filters for 'Status', 'Subscriber', 'Upload Date', and 'Report Type'.

Active	SUSHI Account	Subscriber	Report Type	Counter Release	Contact Information
<input checked="" type="checkbox"/>	ProQuest	SUNY Geneseo	BR1	R4	

- Edit
- Duplicate
- Harvest Now
- View History
- 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.

## Folders

- My Folders
- Shared Folders
  - Alma
    - Acquisitions
    - Analytics Usage Tracking
    - Benchmark
    - Consortia
    - Cost per Use
    - Cost per use via COUNTER reports and acquisitions data
    - Cost per use via COUNTER reports e-inventory and acquisitions data
    - Cost per use via fulfillment data and acquisitions data
    - Course Reserves
    - E-Inventory
    - Electronic Resource Collection Overlap
    - Events
    - Fulfillment
    - Industry Standard Reports
    - Inventory
    - Item Historical Events
    - Licenses
    - Physical Item Usage for Weeding (to be deprecated)
    - Requests
    - Subject Area Contents (to be deprecated)
    - Titles
    - Usage
    - Usage via Alma Link Resolver

## Tasks

## Cost per use via COUNTER reports and acquisitions data

- Expand
- Open
- Export ▾
- Edit
- Publish
- Delete
- Copy
- Rename
- Create Shortcut
- Properties
- Permissions

Type All Sort Name A-Z  Show More Details**Cost per use alphabetically by title for previous calendar year** | Last Modified 7/13/2017 6:59:13 AM | Owner

Open | More ▾

**Five most and least expensive vendors for previous calendar year** | Last Modified 1/1/2018 8:50:32 AM | Owner

Open | More ▾

**Ten most and least expensive titles for previous calendar year** | Last Modified 8/14/2016 2:28:05 PM | Owner

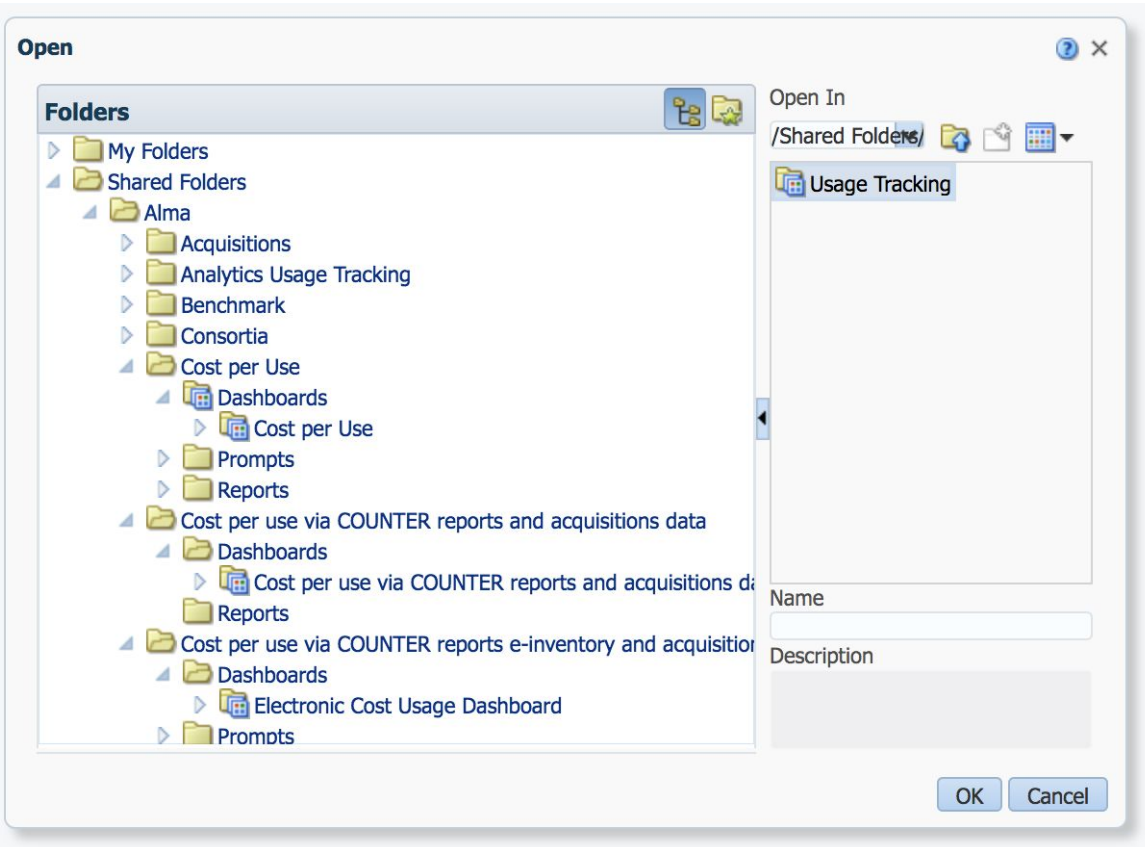
Open | More ▾

# Alma Analytics

Analytics → Design Analytics  
Select Catalog in the top right menu

Preview

# 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)

ExLibris Analytics

Search All [ ] [ ] [ ] Advanced Help Sign Out

Cost per use via COUNTER reports and acquisitions data

Home | Catalog | Favorites | Dashboards | New | Open | Signed In As NUTH

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

**No Results**

The specified criteria didn't result in any data. This is often caused by applying filters and/or selection steps that are too restrictive or that contain incorrect values. Please check your analysis filters and selection steps, and try again. The filters or selection steps currently being applied are shown below.

**Filters**

```
"Usage Date". "Usage Date Year" = YEAR(TIMESTAMPADD(SQL_TSI_YEAR,-1,CURRENT_DATE))
and Cost per Use is not null
and LEFT(Title, 150) is not null
```

[Refresh](#)

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

The screenshot displays a file management interface. On the left, a 'Folders' pane is visible, containing a tree structure of folders: 'My Folders', 'Shared Folders', and 'Alma'. The 'Alma' folder is expanded to show sub-folders like 'Acquisitions', 'Analytics Usage Tracking', 'Benchmark', 'Consortia', 'Cost per Use', 'Cost per use via COUNTER reports', 'Dashboards', 'Reports', 'Cost per use via COUNTER reports', 'Cost per use via fulfillment data', 'Course Reserves', 'E-Inventory', 'Electronic Resource Collection', 'Events', 'Fulfillment', 'Industry Standard Reports', 'Inventory', 'Item Historical Events', and 'Licenses'. The main pane shows a list of reports with columns for 'Type', 'Sort', and 'Show More Details'. The reports are:

- 1. Ten most expensive titles for previous calendar year | Last Modified 5/2/2018 2:18:57 PM | Owner
- 1. Ten most expensive titles for previous calendar year - treemap | Last Modified 1/30/2017 6:12:59 AM | Owner
- 2. Ten least expensive titles for previous calendar year | Last Modified 9/20/2018 6:11:09 AM | Owner
- 3. Five most expensive titles for previous calendar year | Last Modified 5/2/2018 2:20:02 PM | Owner
- 4. Five least expensive titles for previous calendar year | Last Modified 9/20/2018 6:11:33 AM | Owner
- 5. Cost per use for previous calendar year | Last Modified 5/2/2018 2:20:45 PM | Owner

The 'More' dropdown menu for the second report is open, showing options: Print, Export, Add to Briefing Book, Schedule, Delete, Copy, Rename, Add to Favorites, Create Shortcut, Properties, and Permissions. The 'Copy' option is highlighted.

The screenshot shows a web-based file catalog interface. The top navigation bar includes a 'Catalog' title and a 'Location' field displaying '/Shared Folders/SUNY Geneseo 01SUNY\_GEN'. The main area is divided into a left sidebar and a right pane. The sidebar, titled 'Folders', contains a tree view of folders, with 'SUNY Geneseo 01SUNY\_GEN' highlighted at the bottom. The right pane shows a list of folders: 'Dashboards', 'Prompts', and 'Reports'. The 'Reports' folder is selected, and a context menu is open over it, with the 'Paste' option highlighted. The context menu includes options: RSS, Delete, Copy, Paste, Rename, Create Shortcut, Properties, and Permissions. The 'Tasks' pane at the bottom left shows a list of actions for the selected folder, including Expand, RSS, Delete, Copy, Paste, Rename, Create Shortcut, Properties, and Permissions.

Location /Shared Folders/SUNY Geneseo 01SUNY\_GEN

Type All Sort Name A-Z Show More Details

**Folders**

- Reports
- Cost per use via COUNTER reports
- Cost per use via fulfillment data
- Course Reserves
- E-Inventory
- Electronic Resource Collection
- Events
- Fulfillment
- Industry Standard Reports
- Inventory
- Item Historical Events
- Licenses
- Physical Item Usage for Weeding
- Requests
- Subject Area Contents (to be weeded)
- Titles
- Usage
- Usage via Alma Link Resolver
- Usage via COUNTER reports
- Users
- Vendor analysis - physical one
- Widgets
- Community
- Components
- Leganto
- SUNY Geneseo 01SUNY\_GEN**

**Tasks**

- Expand
- RSS
- Delete
- Copy
- Paste
- Rename
- Create Shortcut
- Properties
- Permissions

**Dashboards** | Last Modified 10/11/2018 10:08:54 AM | Owner exlobi  
Expand | More ▾

**Prompts** | Last Modified 10/11/2018 10:08:54 AM | Owner exlobi  
Expand | More ▾

**Reports** | Last Modified 10/11/2018 10:08:54 AM | Owner exlobi  
Expand | More ▾

- RSS
- Delete
- Copy
- Paste**
- Rename
- Create Shortcut
- Properties
- Permissions

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

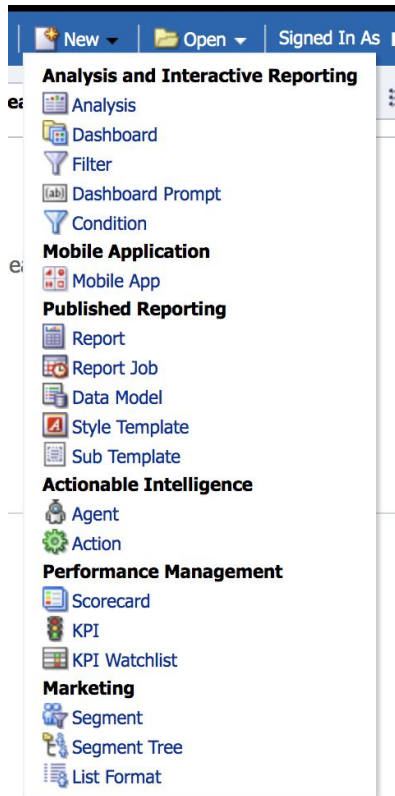
Select desired Location (local institutional folder)

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



**New Dashboard** ? X

Choose a name and location for the new dashboard

Name

Description

Location

Content  Add content now  Add content later (Create empty dashboard)

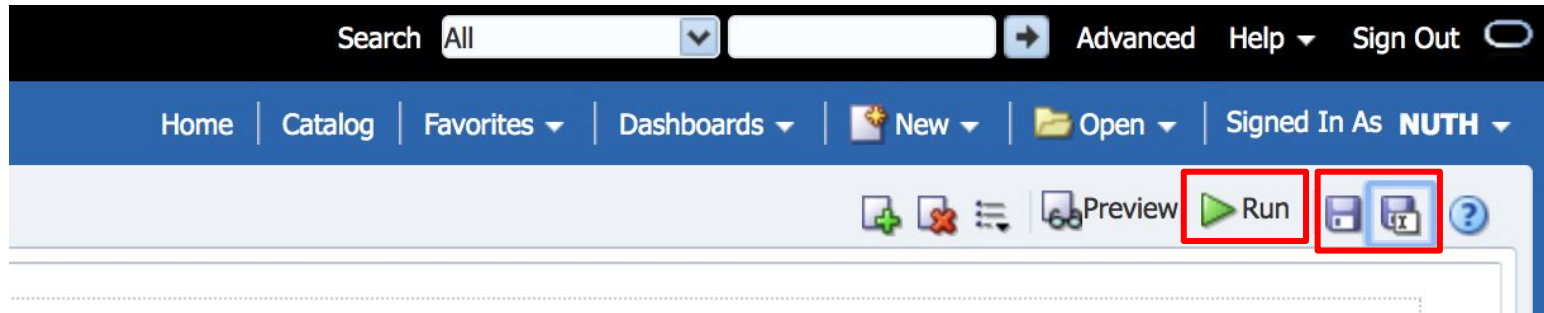
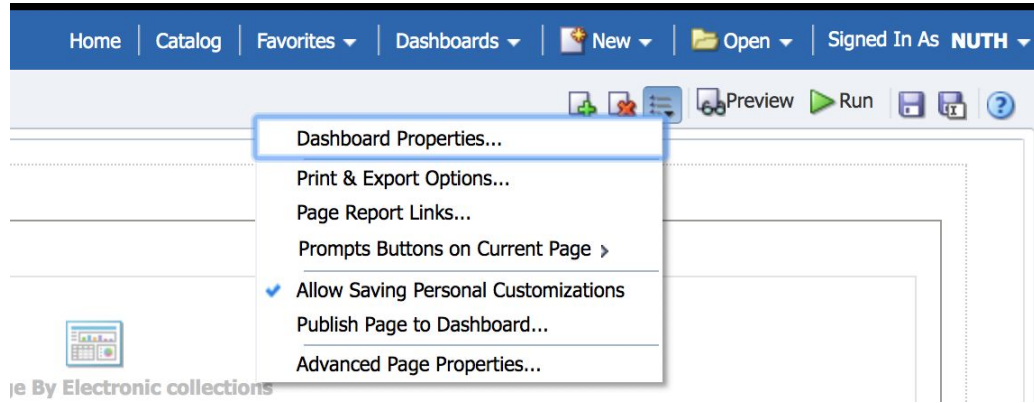
OK Cancel

# If you selected Add Content Now...

The screenshot displays the ERM Training software interface. At the top, a blue navigation bar contains the text "ERM Training" on the left and a series of menu items: "Home", "Catalog", "Favorites", "Dashboards", "New", "Open", and "Signed In As NUTH". Below the navigation bar, the interface is divided into two main sections. On the left, there is a sidebar with two expandable sections: "Dashboard Objects" and "Catalog". The "Dashboard Objects" section lists various components such as "Column", "Section", "Alert Section", "Action Link", "Action Link Menu", "Link or Image", "Embedded Content", "Text", and "Folder". The "Catalog" section is expanded to show a tree structure of folders, including "Shared Folders", "Alma", "Acquisitions", "Analytics Usage Tracking", "Benchmark", "Consortia", "Cost per Use", "Cost per use via COUNTER reports and acquisitions data", "Cost per use via COUNTER reports e-inventory and acquisitions", "Dashboards", "Prompts", and "Reports". The "Reports" folder is further expanded, listing items like "Continuous", "Cost Per Use by Usage Type", "Cost Usage By Electronic collections", "Cost Usage by Resource Type", "Least expensive Dewey subjects", "Least expensive LC subjects", "Least expensive platforms", "Least expensive titles", and "Least expensive vendors". On the right side of the interface, a large, light-colored rectangular area is intended for content placement. It features a faint, centered text prompt that reads "Drop Content Here". At the top right of this area, there are several small icons, including a "Preview" button with a play icon, a "Run" button with a green play icon, and other utility icons.

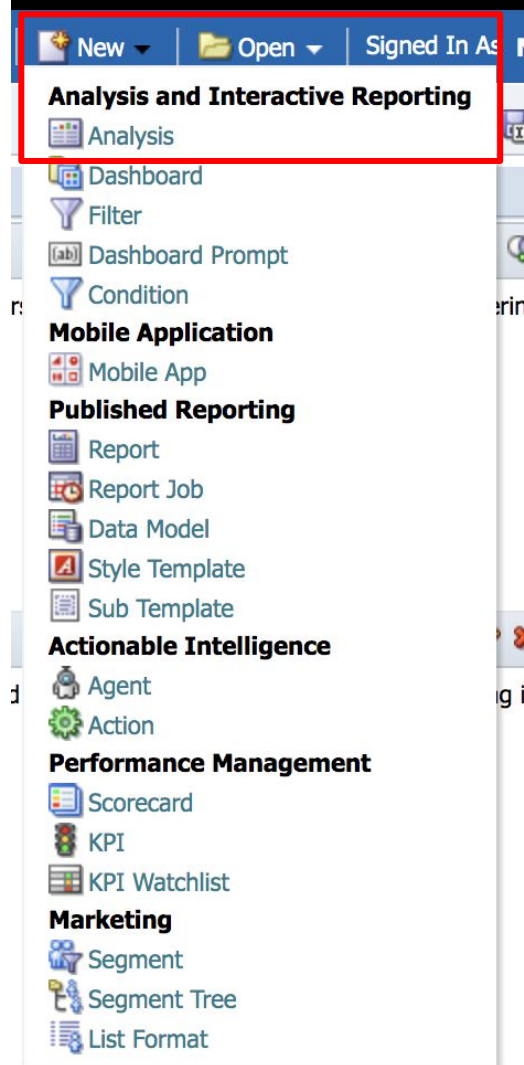
# Reports from the Catalog can be dragged and dropped into the new dashboard:

The screenshot displays the ERM Training interface. On the left, the 'Catalog' tree is expanded to the 'Reports' folder, where 'Cost Usage By Electronic collections' is highlighted in blue. A red arrow points from this report to the dashboard area on the right. The dashboard area is titled 'page 1' and contains two sections: 'Section 1' and 'Section 2'. 'Section 1' contains a report titled 'Cost Usage By Electronic collections Compound View', and 'Section 2' contains a report titled 'Cost Usage by Resource Type Compound View'. The interface also shows a 'Dashboard Objects' list on the left and a top navigation bar with options like 'Home', 'Catalog', 'Favorites', 'Dashboards', 'New', 'Open', and 'Signed In As NUTH'.



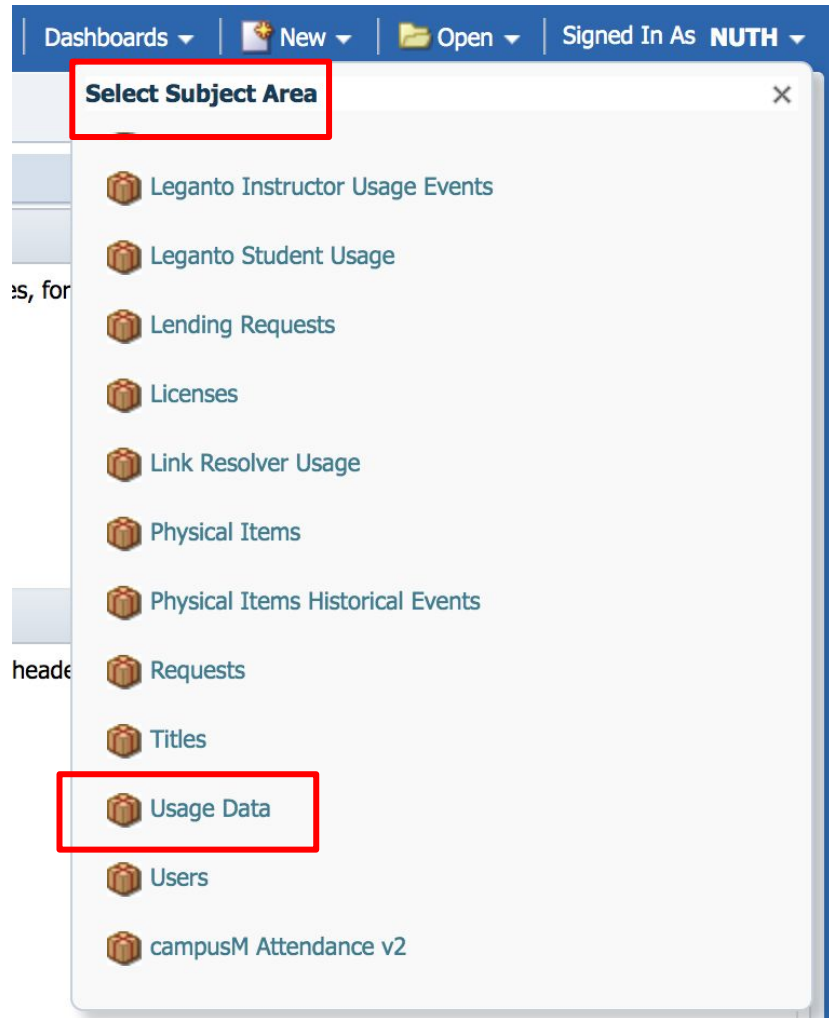
# Create a New Report

New → Analysis and Interactive Report → Analysis

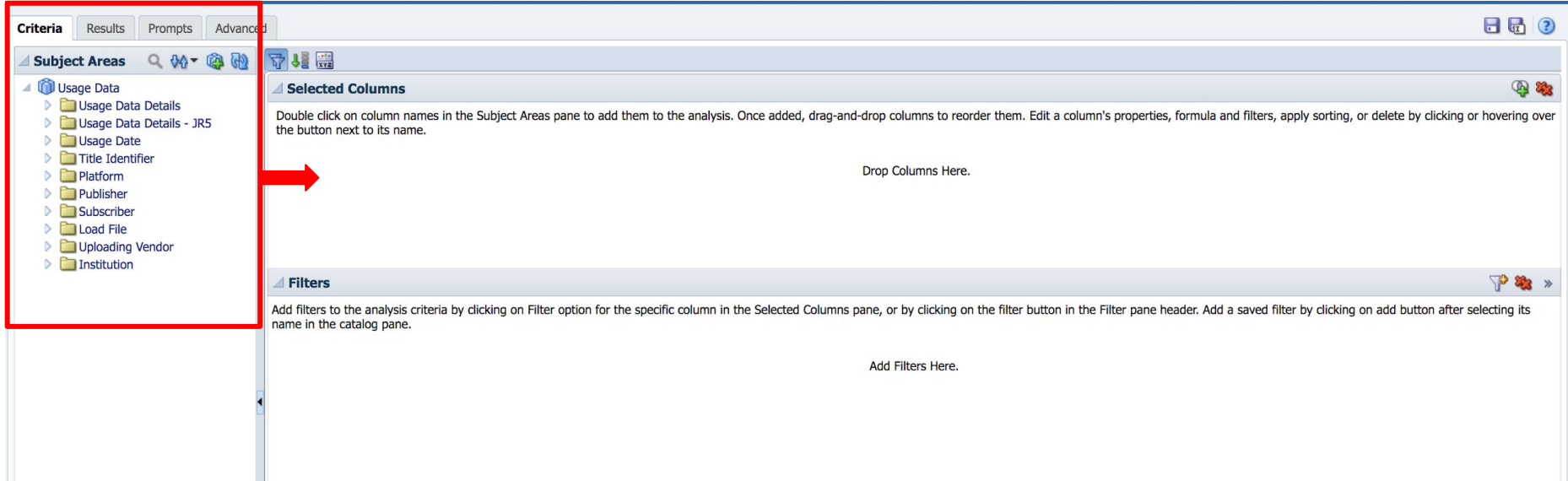




# Select Subject Area (Usage Data)



# Drag and drop Criteria from the Subject Areas into the Analysis



The screenshot displays a software interface with a 'Criteria' pane on the left and a main workspace on the right. The 'Criteria' pane has tabs for 'Criteria', 'Results', 'Prompts', and 'Advanced'. Under the 'Criteria' tab, there is a 'Subject Areas' section containing a tree view of folders: Usage Data, Usage Data Details, Usage Data Details - JR5, Usage Date, Title Identifier, Platform, Publisher, Subscriber, Load File, Uploading Vendor, and Institution. A red box highlights this entire 'Subject Areas' section. A red arrow points from the right side of this box towards the 'Selected Columns' section in the main workspace. The 'Selected Columns' section contains the text 'Drop Columns Here.' Below it is a 'Filters' section with the text 'Add Filters Here.'

**Criteria** Results Prompts Advanced

**Subject Areas**

- Usage Data
  - Usage Data Details
  - Usage Data Details - JR5
  - Usage Date
  - Title Identifier
  - Platform
  - Publisher
  - Subscriber
  - Load File
  - Uploading Vendor
  - Institution

**Selected Columns**

Drop Columns Here.

**Filters**

Add Filters Here.

# Drag and drop the selected criteria into the desired column order

The screenshot displays a software interface with a top navigation bar containing tabs for 'Criteria', 'Results', 'Prompts', and 'Advanced'. The main area is divided into two primary sections: 'Subject Areas' on the left and 'Selected Columns' on the right.

**Subject Areas:** A tree view on the left lists various data categories, including 'Usage Data', 'Usage Data Details', 'Usage Date', 'Title Identifier', 'Platform', 'Publisher', 'Subscriber', 'Load File', 'Uploading Vendor', and 'Institution'. The 'Publisher' category is expanded to show sub-items like 'Publisher' and 'Normalized Publisher'.

**Selected Columns:** This pane is highlighted with a red box and contains a list of columns: 'Publisher', 'Usage Data Details', and 'Usage Date'. Below these, a table shows the selected columns in their current order: 'Publisher', 'BR1 - Book Success Title Requests (total)', and 'Usage Date'. Each column has a small icon and a dropdown arrow next to it.

**Filters:** Below the 'Selected Columns' pane is a 'Filters' section with the text: 'Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after selecting its name in the catalog pane.' Below this text is the placeholder 'Add Filters Here.'

# Apply filters to each criteria as needed:

**Selected Columns**

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, click the button next to its name.

Publisher	Usage Data Details	Usage Date
Publisher	BR1 - Book Success Title Requests (total)	Usage Date

**Filters**

Add filters to the analysis criteria by clicking on Filter option for the column name in the catalog pane.

- Sort
- Edit formula
- Column Properties
- Filter
- Delete
- Save Column As

Usage Date

**New Filter**

Column BR1 - Book Success T

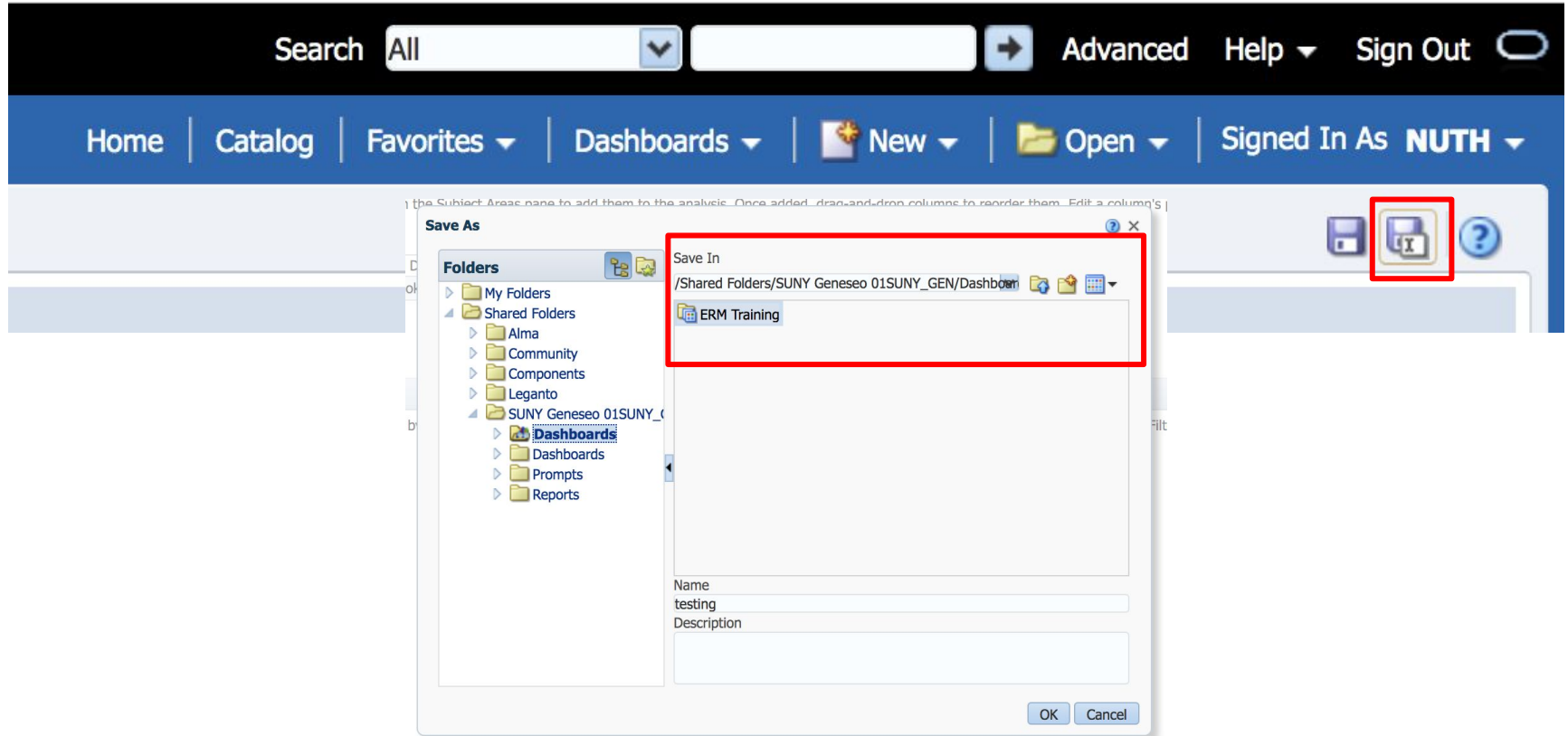
Operator is equal to / is in

Value

Protect Filter

Convert this filter to SQL

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



testing Home | Catalog | Favorites | Dashboards | New | Open | Signed In As NUTH

Criteria **Results** Prompts Advanced

Subject Areas

- Usage Data
  - Usage Data Details
    - Usage Data Details - JR5
    - Usage Date
    - Title Identifier
  - Platform
  - Publisher
  - Subscriber
  - Load File
  - Uploading Vendor
  - Institution

Catalog

List All

- My Folders
- Shared Folders

Views

- Title
- Table

Compound Layout

Title testing

Table

Publisher	BR1 - Book Success Title Requests (total)	Usage Date
1 Dicembre 1918 University of Alba	0	1/1/2015
	0	2/1/2015
	0	3/1/2015
	0	4/1/2015
	0	5/1/2015
	0	6/1/2015
10.2307	0	2/1/2015
	0	3/1/2015
	0	1/1/2018
	0	2/1/2018
	0	3/1/2018
	0	4/1/2018
	0	5/1/2018
	0	6/1/2018
	0	7/1/2018
	0	8/1/2018
	0	9/1/2018
	0	10/1/2018
	0	11/1/2018
	0	12/1/2018
1105 Media Inc.	0	1/1/2015
	0	2/1/2015
	0	3/1/2015
	0	4/1/2015
	0	5/1/2015
	0	6/1/2015
	0	7/1/2015

Selection Steps

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

Results can be printed, exported, or saved

The screenshot displays a software interface with a blue header labeled "testing". Below the header, there are tabs for "Criteria", "Results", "Prompts", and "Advanced", with "Results" being the active tab. On the left, a "Subject Areas" tree view is visible, containing folders such as "Usage Data", "Usage Data Details", "Usage Data Details - JR5", "Usage Date", "Title Identifier", "Platform", "Publisher", and "Subscriber". A toolbar above the main content area includes icons for search, navigation, and actions. A red box highlights the "Export" icon (a document with an upward arrow), which has opened a dropdown menu. This menu lists the following export options: "PDF", "Excel 2007+", "Powerpoint 2007+", "Web Archive (.mht)", and "Data >". Another red box highlights the "Print" icon (a printer) in the same toolbar. At the bottom of the interface, a navigation bar contains links for "Home", "Catalog", "Favorites", "Dashboards", "New", "Open", and "Signed In As NUTH". In the bottom right corner, there are icons for a folder, a document with a checkmark, and a help icon, with the document icon highlighted by a red box.

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