ERM-301
Usage Statistics, COUNTER, and SUSHI Harvesting

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Customer Education Team
A few points about WebEx

• Technical issues? Exit and rejoin the WebEx session
• Submit questions via WebEx Chat: Select **All Panelists** in the **To:** dropdown menu
• Turn captions on and off in the lower-left corner of the WebEx screen
## Managing Electronic Resources Series

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<td>Sep 27</td>
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<td>Order and Activate Portfolios</td>
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<td>Contribute to the Community Zone</td>
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Agenda

• Review Exercises
• Usage Statistics for E-Resources
• Upload COUNTER Reports
• Set Up SUSHI Harvesting
• Resources (including exercises)
Review Exercises - Overlap Analysis

• Compare a CZ collection to all of IZ
• Compare an IZ collection to all of IZ
• Compare a vendor-supplied title list to all of IZ
Agenda

- Review Exercises
- Usage Statistics for E-Resources
- Upload COUNTER Reports
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- Resources (including exercises)
What are Usage Statistics for E-Resources?

• The number of times e-resources are accessed ("used") by patrons
• Can help you:
  • Develop collection
  • Allocate budget
  • Monitor trends over time
  • Negotiate with providers
  • Advance institution goals
• Data provided by vendors and by Alma’s link resolver
What is COUNTER?

**Counting Online Usage of Networked Electronic Resources**

- Usually called “COUNTER Reports”
- Industry standard for vendors to report usage data of electronic resources
- Standardized by Project COUNTER
Different COUNTER Reports for Different Data

• TR_J1 - Journal Title Requests
• TR_B1 - Book Title Requests
• IR - Extended Item Report
• DR_D2 - Database Report - Access Denied

And many more!
## Example COUNTER Report

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Report_Name</td>
<td>Journal Requests (Excluding OA_Gold)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Report_ID</td>
<td>TR_J1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Release</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Institution_Name</td>
<td>Sample University</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Institution_ID</td>
<td>isni=1234567890</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Metric_Types</td>
<td>Total_Item_Requests; Unique_Item_Requests</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Report_Filters</td>
<td>Data_Type=Journal; Access_Type=Controlled; Access_Method=Regular</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Report_Attributes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Exceptions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Reporting_Period</td>
<td>2017-01-01 to 2017-06-30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Created</td>
<td>2017-05-25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Created_By</td>
<td>Platform X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Title</td>
<td>Publisher ID: isni=1234123412341234 PlatformX</td>
<td></td>
<td>DOI: /12.1.0.1/11</td>
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<tr>
<td>15</td>
<td>Journal A</td>
<td>Publisher X</td>
<td>isni=1234123412341234 PlatformX</td>
<td>/12.1.0.1/11</td>
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<tr>
<td>16</td>
<td>Journal A</td>
<td>Publisher X</td>
<td>isni=1234123412341234 PlatformX</td>
<td>/12.1.0.1/11</td>
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<tr>
<td>17</td>
<td>Journal B</td>
<td>Publisher X</td>
<td>isni=1234123412341234 PlatformX</td>
<td>/12.1.0.1/11</td>
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<td>18</td>
<td>Journal B</td>
<td>Publisher X</td>
<td>isni=1234123412341234 PlatformX</td>
<td>/12.1.0.1/11</td>
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</table>
How Usage Reports are Used

Alma Analytics combines data from multiple vendors with title normalization
How Usage Reports are Used (cont.)

Alma Analytics combines usage data with costs

<table>
<thead>
<tr>
<th>LC Classifications</th>
<th>Cost</th>
<th>Usage</th>
<th>Cost Per Use</th>
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</thead>
<tbody>
<tr>
<td>The Family. Marriage. Women</td>
<td>64,554.75</td>
<td>100,592.50</td>
<td>0.64</td>
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<tr>
<td>Portuguese literature</td>
<td>1,505.00</td>
<td>1.00</td>
<td>1,505.00</td>
</tr>
<tr>
<td>Technology (General)</td>
<td>1,302.78</td>
<td>5,157.73</td>
<td>0.25</td>
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<tr>
<td>Mathematics</td>
<td>1,275.79</td>
<td>34,157.23</td>
<td>0.04</td>
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<tr>
<td>Industries. Land use. Labor</td>
<td>1,041.10</td>
<td>10,172.47</td>
<td>0.10</td>
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<tr>
<td>Science (General)</td>
<td>757.04</td>
<td>1,164.34</td>
<td>0.65</td>
</tr>
<tr>
<td>Law in general. Comparative and uniform law. Jurisprudence</td>
<td>533.35</td>
<td>82,541.52</td>
<td>0.01</td>
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<tr>
<td>Commerce</td>
<td>523.22</td>
<td>22,270.43</td>
<td>0.02</td>
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<tr>
<td>Internal medicine</td>
<td>473.32</td>
<td>49,612.23</td>
<td>0.01</td>
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<tr>
<td>Finance</td>
<td>430.29</td>
<td>727.90</td>
<td>0.59</td>
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</table>
What is SUSHI?

**Standardized Usage Statistics Harvesting Initiative**

- Industry standard for institutions to automatically harvest (retrieve and upload) COUNTER usage reports from vendors.
- Standardized by NISO
Agenda

- Review Exercises
- Usage Statistics for E-Resources
- **Upload COUNTER Reports**
- Set Up SUSHI Harvesting
- Resources (including exercises)

- Usage Data Operator
- Vendor Manager
Agenda

- Review Exercises
- Usage Statistics for E-Resources
- Upload COUNTER Reports
- **Set Up SUSHI Harvesting**
- Resources (including exercises)
SUSHI Prerequisites

• Configure COUNTER Subscriber for your institution
• Configure Vendor
• Info from vendor:
  • SUSHI access URL
  • Credentials
  • Supported COUNTER report types
Agenda

• Review Exercises
• Usage Statistics for E-Resources
• Upload COUNTER Reports
• Set Up SUSHI Harvesting
• **Resources (including exercises)**
Documentation and Further Training

• Managing COUNTER-Compliant Usage Data in Alma
• Project COUNTER
• SUSHI at NISO
• Managing Electronic Resources
• Alma Resources LibGuide (see Electronic Resource Management)
About Today’s Session, and Register for Next Week

Ex Libris Knowledge Center > Alma > Training > Webinars > E-Resource Management

• Download these presentation slides
• Watch recordings of this session (and previous sessions)
• Download practice exercises
• Register for upcoming sessions
  (and see what content they will contain)
Exercises

- Request or retrieve COUNTER report from a vendor
-Upload the COUNTER report into Alma
-Set up SUSHI harvesting for a vendor that provides it

Download exercise file for details.

Bring any questions and issues to our next session.

Do this in your Alma Production Environment!
Next Week: Analytics of E-Resources

- Use and modify default ERM Reports and Dashboards (for both Alma-linking usage data and COUNTER usage data)
- Create new ERM reports
- Find overlap between print and e-resources
Thank you!

Please fill out the survey that will appear when you close the WebEx meeting.