Managing COUNTER Reports in Alma

ELUNA 2017

Andrew French | Director of Sales Operations

Originally created by Vlad Buldyrev and Yaala Ariel-Jones
Brief Session Description: understanding how to manage COUNTER-compliant usage data in Alma

Session Goals:
- By the end of this session you will have introductory knowledge on how to:
  - Upload files
  - Monitor “Load Usage Data”
  - Utilize Analytics Usage and Cost Usage reports

We will cover some recently asked questions
What is **Project Counter**?

- Project COUNTER – [www.projectcounter.org](http://www.projectcounter.org)
  (Counting Online Usage of Networked Electronic Resources)
Transition from UStat to COUNTER data management in Alma
Before May 2017 Release: COUNTER is managed in UStat

• COUNTER usage data was loaded until now to UStat
• To query via Alma, a weekly job ran to populate data in Alma Analytics
As of May 2017 Release: COUNTER is managed in Alma

• Today, COUNTER usage data is loaded directly to Alma.
  • Unified management interface, one login.
  • Review results – within a day.
  • More COUNTER Report Types are available now.

“COUNTER Reports from Ustat to Alma”
Laura Guy
Thursday, May 11, 11:15-12:00
Nirvana A
Roles required

The following roles relate to COUNTER compliant user statistics:

- **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 data for any vendor, manage the uploaded data files, and view missing COUNTER data. *New role!*
- **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.
Roles required

**Usage Data Operator** –
can manually upload data for any vendor, manage the uploaded data files, and view missing COUNTER data.
Vendor Configuration

- Files can be loaded manually, directly in the Vendor’s “Usage Data” tab.
Vendor Configuration

- Files can be loaded manually, directly in the Vendor’s “Usage Data” tab.
Vendor Configuration

- A Vendor can be defined as SUSHI Vendor after clicking the “SUSHI Vendor” checkbox
What is SUSHI?

• The Standardized Usage Statistics Harvesting Initiative (SUSHI) protocol automates the **MONTHLY** collection and transport of electronic resource usage statistics reports from COUNTER-compliant vendors.

• SUSHI protocol was created to replace the time consuming manual collection of COUNTER usage data.


• View the NISO SUSHI Standard/Code of Practice: [http://www.niso.org/workrooms/sushi/](http://www.niso.org/workrooms/sushi/)
Vendor Configuration

• Add or edit SUSHI harvesting account from the Vendor’s Usage Data tab.
• Your current setup (credentials) can be downloaded from UStat.

![SUSHI Account Details]

- **Vendor name**: AMERICAN CHEMICAL SOCIETY
- **Vendor URL**: http://pubs.acs.org/api/soap/analytics/SushiServ
- **Requester ID**: AdminACS
- **Customer ID**: [redacted]
- **User Name**: AdminACS
- **Report Type**: JR1
- **Requester Email**: [redacted]
To get SUSHI data from vendors into Alma, a job will run weekly:

- **General System Administrator** can activate, deactivate, schedule, or monitor the job, view a job's history, report, and events, and configure email notifications for the job on the Monitor Jobs page.
- **Acquisitions Administrator** can activate, deactivate, or schedule this job, or run it manually.
- **Vendor Manager** can run the job manually for a single vendor account and view a history of how often this was performed.
Time for Demo

The right word may be effective, but no word was ever as effective as a rightly timed pause.

Mark Twain
Manually Uploading Files
Manually Loading Files

- It is possible to load files directly to Alma from: ACQUISITIONS → Import → Load Usage Data
Manually Loading Files

- Filters and Action options exist:

- A file can be deleted, downloaded...
Manually Loading Files

• A favorite: the “Missing Data” tab:

<table>
<thead>
<tr>
<th>Subscriber</th>
<th>Platform</th>
<th>Measured By</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ACS Publications</td>
<td>JR1 - Record views</td>
<td>✓</td>
<td>✓</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>2</td>
<td>ACS Publications</td>
<td>BR2 - Book sections views</td>
<td>✓</td>
<td>✓</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>3</td>
<td>ACS Publications</td>
<td>JR1a - Record views archive</td>
<td>✓</td>
<td>✓</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>4</td>
<td>ACS Publications</td>
<td>PR1 - Regular Searches</td>
<td>✓</td>
<td>✓</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>5</td>
<td>ACS Publications</td>
<td>PR1 - Result Clicks</td>
<td>✓</td>
<td>✓</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
</tbody>
</table>
Subscribers
Subscribers - setup

• Subscribers represent the **account** with a vendor. Subscriber information is provided by, or agreed upon with, the vendor.

• For an institution, subscribers can be used to separate the usage data by **campus or library** (when the vendor can distinguish access to its resources by the IP addresses of each entity).

• Alma requires you to define at least one subscriber.
Subscribers - setup

- Subscribers can be defined in the Acquisition Configuration Menu
Subscribers - setup

- Subscriber information is part of the SUSHI account
Subscribers - setup

- Subscriber can be used when filtering
Reporting

Ernie, tell me, how do I look?

With your eyes, Bert.
Analytics refresh (ETL) happens daily

- Analytics is updated daily, data is taken from Alma.
Usage information in Alma

- Search **Electronic Portfolios** to see Usage Data:

```
Find | Electronic Portfolio | where | Keywords | contains | nature biotechnology | Go
```

<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Description</th>
<th>Available from</th>
<th>Most recent 1 year(s)</th>
<th>Nature biotechnology</th>
<th>Related Records</th>
<th>Orders</th>
<th>Licenses</th>
<th>Courses</th>
<th>Combined Usage (last 12 months)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Nature biotechnology</td>
<td>Gale Cengage Business Collection (Gale Cengage Business Collection): getFullText</td>
<td>2000</td>
<td>not available</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>Nature biotechnology</td>
<td>Gale Cengage Health Reference Center Academic ASAP: getFullText</td>
<td>2000</td>
<td>not available</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>3</td>
<td>Nature biotechnology</td>
<td>Gale Cengage Expanded Academic ASAP: getFullText</td>
<td>2000</td>
<td>not available</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>Nature biotechnology</td>
<td>Gale Cengage Academic OneFile: getFullText</td>
<td>2000</td>
<td>not available</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
Usage information in Alma

• Expand and begin to analyze:
Analytics Reporting

- COUNTER data exists in Analytics “Usage Data” and “Cost Usage” subject areas.

Field Descriptions

The following lists the fields available in Usage Data.

Field Descriptions

The following lists the fields available in Cost Usage.
Analytics Reporting

- Reports and Dashboards are already offered for immediate use:
Out of the box report:

- Usage Data - Journals - top 5 used publishers for article usage in the previous calendar year

<table>
<thead>
<tr>
<th>Publisher</th>
<th>Usage Measures Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elsevier</td>
<td>226,040</td>
</tr>
<tr>
<td>John Wiley and Sons</td>
<td>44,479</td>
</tr>
<tr>
<td>American Chemical Society</td>
<td>34,255</td>
</tr>
<tr>
<td>Springer</td>
<td>30,910</td>
</tr>
<tr>
<td>Nature Publishing Group</td>
<td>14,674</td>
</tr>
</tbody>
</table>
Analytics Reporting, documentation:

• **Usage Data:**
  https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Analytics/160Usage_Data

• **Cost Usage:**
  https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Analytics/170Cost_Usage

• **Remember also the Link Resolver Usage:**
  https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Analytics/150Link_Resolver_Usage

• **Understanding the “Cost Usage” Subject Area:**
Next Steps and Support Resources
Next Steps and Support Resources

• Documentation and presentations:
  
  • **Online Help:**
    https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Acquisitions/090Acquisitions_Infrastructure/010Managing_Vendors/Managing_COUNTER-Compliant_Usage_Data

  • **May Release Notes!**

  • **Ask the Expert, 2017-01-30 COUNTER Report Management in Alma – Functionality and Rollout:**
    https://knowledge.exlibrisgroup.com/Alma/Training/Ask_the_Alma_Expert/9967_COUNTER_Report_Management_in_Alma-%E2%80%93_Functionality_and_Rollout

  • **Ask the Expert: COUNTER Report Harvesting and Uploading in Alma:**
    https://www.youtube.com/watch?v=Mnods8ZRZsg

  • **Alma matters (no password required):**
    https://proquestmeetings.webex.com/proquestmeetings/lsr.php?RCID=af34321ace684023ad9c3ca08c83fd63

  • **Presentation on Analytics Cost Usage:**
    https://knowledge.exlibrisgroup.com/@api/deki/files/48654/Analytics_Overview_of_calculation_of_the_cost_per_use_in_the_Cost_Usage_subject_area_with_DB_and_JR1.pptx
Some Recent Conversations

Don’t have the access you expect? Check your user roles.

Data not loading properly? Check to see if it is under a different platform name—not a vendor name.

How can we see what was brought over from USTAT? Analytics.

If we have a resource through an expensive package and a free package, how does this display in counter reports? Alma uses the PO line to pull financials. It matches on ISSN.
Questions?

Please join us at ALA Annual for *What Your Library Data ISN’T Telling You: New Features in Library Services Platform Analytics* !!