Managing COUNTER-Compliant Usage Data
Harvesting, uploading, reporting

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Introductions

• Vlad Buldryev, Senior Support Analyst
  • Specializes in link resolution and delivery across Ex Libris products.
  • Holds an MLIS degree from Simmons College.

• Yaala Ariel-Joel, Support Analyst
  • At Ex Libris, working with Alma, Aleph, and SFX customers
  • Prior to joining Ex Libris worked as a reference librarian and some other functions in several special libraries.
Objectives and Target Audience

• Brief Session Description: understanding how to manage COUNTER-compliant usage data in Alma

• Session Deliverables:
  • By the end of this sessions you know how to:
    • Set-up SUSHI Vendor in Alma
    • Upload files – manually and via SUSHI
    • Monitor “Load Usage Data”
    • Utilize Analytics Usage and Cost Usage reports

• Session Target Audience:
  • All level customers
  • Systems, Technical and all interested librarians

What is Project Counter?

• Project COUNTER – 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
COUNTER on the Roadmap

- COUNTER featured on the Roadmap

Managing COUNTER Compliant Usage Data

Customer Value
- One location for Managing COUNTER Compliant Usage Data without needing to use Alma with another COUNTER report management tool.
- Support for additional COUNTER report types

Feature Highlights
- SUSHI accounts defined in a new “Usage Data” tab of the vendor record
- COUNTER reports can be uploaded both manually and via SUSHI harvesting.
- Daily ETL to 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

Yoel and Laura Guy from Colorado School of Mines review the development plans before the beginning of the ELUNA Conference. May 3, 2016. Oklahoma, USA.
Agenda

1. COUNTER management
2. Roles, Vendor configuration, SUSHI harvesting
3. Manually uploading files
4. Reporting
5. Support Resources and Survey

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.

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

Files can be loaded manually, directly in the Vendor’s “Usage Data” tab.
The vendor record – manually load files

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

The vendor record - SUSHI

- 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.


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The vendor record - SUSHI

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

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

Mark Twain

Load Usage Data – for any vendor

- It is possible to load files directly to Alma from: ACQUISITIONS → Import → Load Usage Data
Load Usage Data – for any vendor

• Filters and Action options exist:

• A file can be deleted, downloaded...

Load Usage Data – for any vendor

• A favorite: the “Missing Data” tab:
Another Demo (data load)

How do I look?

Ernie, tell me, how do I look?
With your eyes, Bert.
Usage information in Alma

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

Find Electronic Portfolio ▼ where Keywords ▼ contains nature biotechnology Go

Usage information in Alma

• Expand and begin to analyze:
Jobs relevant to COUNTER harvesting

Analytics refresh (ETL) happens daily

- Analytics is updated daily, data is taken from Alma.
SUSHI harvesting job, weekly

- 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.
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

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Create a New Code Table Row

Quick Add

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• Subscriber information is part of the SUSHI account

• Subscriber can be used when filtering
• COUNTER data exists in Analytics “Usage Data” and “Cost Usage” subject areas.
Analytics Reporting

- Reports and Dashboards are already offered for immediate use:

- Out of the box report:
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!
  - 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

Q & A

Any Questions?
Session Survey Evaluation

Please use the following link https://www.surveymonkey.com/r/techsem2017 to provide feedback on your sessions.