Uploading COUNTER Reports and Configuring SUSHI in the Client Center and Intota

Amy Pemble | Product Manager, Resource Management
Scott Shull | Team Leader, Global Education

Introductions

• Amy Pemble, Product Manager, Resource Management
• Scott Shull, Team Leader, Global Education
Objectives and Target Audience

• Description:
  • In this session we will review the data harvesting methods, configuration requirements and the process for manually uploading Counter reports

• Objective:
  • By the end of this session you will:
    • Realize the changes to Counter data retrieval in 2017 and beyond;
    • Understand the data retrieval methods and learn how to configure your vendors for DRS and/or SUSHI harvested reports;
    • Walk through the process of manually uploading Counter-compliant usage reports

• Target Audience:
  • Technical Services / Systems Librarians working with Counter in the Client Center or Intota

Agenda

1. 2017 Changes to COUNTER Data Retrieval
2. Project COUNTER, Data Retrieval Options and Configuration
3. Workflow for Manually Uploading Counter Reports
4. Hands-on Exercise
5. Next Steps, Support Resources and Survey
Changes to COUNTER Data Retrieval in 2017

What’s Changing?

• Two DRS Counter data collections in 2017 and beyond:
  • Mid-year collection July (January – June usage data)
  • Year-end collection in February 2018 (January-December 2017 usage data)

• Changes to provider’s authentication requirements
  • IP authentication requires some custom configuration so that Ex Libris can
    your usage data at the Provider’s site;
  • Two-Factor authentication - Impossible for Ex Libris to collect usage data from
    third parties
Supporting SUSHI in 2017

- **Increasing the SUSHI data harvester capacity**
  - Increases the volume of reports that can be uploaded and processed simultaneously

- **Integrate a back-end tool that enables more error-free manually uploaded reports**
  - Automatically troubleshoots and fixes the more common errors encountered with the usage data files

- **Improve and document better client-facing error reports**
  - Make it easier for customers to fix upload errors and re-harvest the usage report themselves

Usage Data Harvesting and Uploading Options

- **For Counter Usage data in Intota or the Client Center:**
  - Configure Administration-based (DRS) harvesting and uploads
  - Configure automated SUSHI data harvesting
  - Gather your own usage data from your providers and manually upload it into Intota for viewing in Intota Assessment
What is Project Counter?

- Project COUNTER – www.projectcounter.org
  (Counting Online Usage of Networked Electronic Resources)

- Created to improve the reliability of online usage statistics

- Project COUNTER objective is to create an electronic usage reporting standard which ensures that all Counter-compliant vendor online usage data is credible, compatible and consistent

Code of Practice – Release 4:
http://www.projectcounter.org/code_practice.html
Project Counter

COUNTER provides the standard that enables the knowledge community to count the use of electronic resources. Known as the Code of Practice, the standard ensures vendors and publishers can provide their library customers with consistent, credible and comparable usage data.

Data Retrieval Options
### Usage Data Retrieval Options

Data Upload services are configured using the Data Retrieval Service Request Form in Intota and the Client Center.

Chose from two data retrieval methods:
- Administration-based Harvesting (Technical Support team)  
  (counterdrs@serialssolutions.com)
- SUSHI-Protocol Harvesting (Auto-Harvested)

### Usage Data Retrieval Options

1. **Administration-based Harvesting**: DRS team retrieves, cleans, and uploads your Project-COUNTER compliant usage statistics from various vendors, providers, and publishers
   - DRS uploads occur twice a year: July and January of the following year
   - January (annual) upload overlays entire previous mid-year uploaded data

2. **SUSHI**: Automated, server-to-server (XML) upload protocol
   - Monthly uploads for discrete month of usage data
   - Data is uploaded 2-3 months behind the actual upload date (e.g. January usage data is uploaded in March)
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

• Required in the Release 3 (R3) Code of Practice in 2008

• View the NISO SUSHI Standard/Code of Practice:
  http://www.niso.org/workrooms/sushi/

| LEDGE SERVICES | INNOVATION | LEARNING | LIBRARIES | INFORMATION | LIBRARY | EDUCATION | LIBRARIANS | LIBRARY SERVICES | INFORMATION SERVICES | INFORMATION TECHNOLOGY | LIBRARY ADMINISTRATION |

NISO / SUSHI Standard

Registry of SUSHI Providers:
http://www.niso.org/workrooms/sushi/registry_server/
www.projectcounter.org
Data Retrieval Configuration in Intota and the Client Center

Vendor Statistics Management

MY INTOTA
Upcoming Renewals

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License Expirations

| 10/25/2016 | GIK Medialink MB+ On-Line University License Agreement |
| 10/31/2016 | Enhanced GPO Database Service Subscription Renewal |

ASSESSMENT
Intota Assessment
Overlap Analysis

ADMINISTRATIVE
Menu Settings
Management Reports
Vendor Statistics Management
E-Journal Portals Admin Console
Cost Data Upload
360 Link Admin Console
Summon Admin Console
Ulrichsweb Admin Console
### DRS Data Retrieval Service Form

**Vendor Statistics Management**

**Manage Data Retrieval**

**Regarding Frequency**: Twice per Year

**Primary Contact**: Scott Shull
**Email**: scott.shull@proquest.com
**Phone**: 206-328-7326

**Alternate Contact**: Bob Martin
**Email**: bob.martin@proquest.com
**Phone**: 206-289-5857

Let updated: 11/4/2016 8:12:16 PM by Scott Shull

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### DRS Vs. SUSHI Configuration

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Data Retrieval Configuration

**Manual Data Retrieval Configuration**

- **DRS Provider Name**: American Mathematical Society
- **Custom URL**: [http://www.ams.org COUNT](http://www.ams.org)er
- **User Name**: 
- **Password**: 
- **Add Library Note**: 
- **Select Reports**: 
  - BR1
  - BR2
  - BR3
  - BR4
  - DB1
  - DB2
  - JR1

[Save]

SUSHI Configuration

**Automatic (SUSHI) Data Retrieval Configuration**

- **DRS Provider Name**: American Mathematical Society
- **Test SUSHI Settings**

[Save]
### Completed Configuration

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### Data Retrieval Service (DRS) Form

#### Manage Your Data

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<tr>
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<td>Cost Data Upload</td>
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**Business Intelligence Tools**

- 360 Usage Statistics
- Overlap Analysis
- Data On Demand
- Management Reports

### Business Intelligence Tools

- 360 Counter
- Ulrich's Serials Analysis System
Data Retrieval Service Form

DRS v. SUSHI Configuration
**Data Retrieval Configuration**

Fields in bold indicate required information for usage statistics to be harvested and uploaded. These fields are not required to save this form.

DRS Provider Name: American Mathematical Society  ✔ Counter 4 Compliant

**SUSHI Configuration**

Fields in bold indicate required information for usage statistics to be harvested and uploaded. These fields are not required to save this form.

DRS Provider Name: American Mathematical Society  ✔ Counter 4 Compliant

Custom URL: [http://www.ams.org/Counter](http://www.ams.org/Counter)
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2. **Counter Reports in Intota**

- **Home**
- **Resources**
- **Tools**
- **Surveys**
- **Admin**

**RESOURCES SUMMARY**
- Providers (22)
- Databases (33)
- Holdings (2211856)
- Ebooks (2197698)
- EJournals (13858)

**MY INTOTA**
- **Upcoming Renewals**
  - There are no upcoming resources renewals.
- **License Expirations**
  - There are no upcoming license expirations.
### Counter Reports Page

#### COUNTER Reports

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#### Manage Your Data

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#### Business Intelligence Tools

**360 Usage Statistics**
- Data On Demand
- Management Reports

**Overlap Analysis**

**Data On Demand Management Reports**

**Unichrome Usage Statistics**
- New Platform Preview
- Unichrome Usage Statistics

**Unichrome Serials Analysis System**

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# Counter Reports Page

## 360 Counter

### Recommendations and Best Practices

**ExLibris**

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**SUSHI Need-to-Knows/Reminders**

- SUSHI reports represent discrete *monthly* usage
  - e.g. 12 reports per year (one for each month) for each report type requested, by Vendor

- Data contained in SUSHI uploaded reports in Intota or Client Center run 2 months behind the actual upload date

- SUSHI is a technological work-in-progress; Upload errors, especially early on are common

---

**Data Error Log Message Definitions**

Go back to the DRS Form, open the provider configuration page and update it.
Data Error Log Message Definitions

Go back to the DRS Form, open the provider configuration page and update it.

Data Processing Time Frame

ExLibris has a weekly timeframe for uploading usage data from Intota to Intota Assessment:

- Data from Counter is captured weekly, every Monday at 7:00p EST
- Data entered by clients before Monday, 7:00p EST will be available in Intota Assessment Reports by Friday at 6:00p EST
## Best Practices and Recommendations

- Regularly maintain and update your DRS Form with accurate URLs and credentials
- Add helpful notes, instructions and reminders in the DRS Form Configuration Page
- Utilize the “View Log” on the Counter Reports page to view any errors ([Data Log Message Definitions](#))
- Work with Providers to address any SUSHI upload errors; Contact the Technical Support team for assistance

## DRS or SUSHI Uploads?

**This decision depends largely on the how you use or review your Counter data for collection management.**

**DRS (Admin-based)** harvesting is uploaded 2 times/year
- Mid-Year upload in July contains data from calendar year January – June
- February upload (following year) contains the previous calendar year’s usage data, January – December
- Providers are increasingly demanding more robust authentication

**SUSHI:** Automatically harvested monthly via XML format
- You’ll see more reports on your Counter page
- Work through with upload errors w/ SUSHI more than DRS
- Future trend
- Ask yourself: Are you really analyzing your usage data each month?
Upload Fundamentals

• **Fundamental requirements for uploading COUNTER electronic usage reports into Intota or the Client Center:**

  1. Usage data (reports) must be in [COUNTER-Compliant](#) format or you must copy your non-Counter compliant provider data and paste it to a Counter-compliant template to be uploaded

  2. Track/subscribe to the provider's resource – database and titles – for which you are uploading usage data

     e.g. Emerald/Emerald Journals (Database) for PR/DB reports; Titles in that database for JR/BR reports

  3. Usage data must be uploaded as .csv or .txt file
Uploading COUNTER Reports in Intota and the Client Center

Reasons for Manual Data Upload

- Special projects or other reporting needs that fall outside of the 2x/year collection
- Provider uses two-factor notification
- Provider doesn’t offer a SUSHI option
COUNTER Data File Upload Basic Workflow

1. Gather your usage data. Navigate to the Provider’s website, login and download your usage data reports (files)

2. Save the usage data file locally as a .csv or .txt file
   - Save the file using a naming convention that makes it easy to recognize, remember and identify when you go to upload it (e.g. Oxford.JR1.June.2016.txt)

3. Navigate to the Counter Reports page from the Intota Home Page

4. Click the Upload button on the Counter Reports page
   - Select the Provider (from which you downloaded your usage data)
   - Choose the usage data file to upload (the one you saved earlier)

Manual Data Upload - Intota

1. Gather your usage data. Navigate to the Provider’s website, login and download your usage data reports (files)
2. Name and save the usage data file locally


Non-Counter Compliant Vendors

- Save your downloaded usage data (e.g. ProviderX.JR1.June 2016.csv)
- Copy it into one of the appropriate Counter-compliant templates available in the Customer Knowledge Center (Article 7189)
Counter Report Page in Intota

3. Navigate to the Intota Home Page > Reports Menu > Counter Reports

Counter Reports Page

4. Click the Upload Report button on the Counter Reports page
Select the Provider from which you downloaded the usage data file.
### Upload Counter Report

**Filter By:** Select

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<th>Vendor</th>
<th>Publisher</th>
<th>Report Range</th>
<th>Upload Time</th>
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### MY Intota

**Filter By:** Select

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**RESOURCE SUMMARY:**
- Providers (22)
- Databases (50)
- Holdings (2215881)
- Ebooks (2201382)
- Journals (108096)

**QUICK LINKS:**
- Alerts
- Contacts
- Licenses
- Notes

**MY INTOTA View A**

- Upcoming Renewals
- License Expirations

**ASSESSMENT**
- Intota Assessment
- Overlap Analysis

**ADMINISTRATIVE**
- Resource Sharing
- Menu Settings
- Management Reports
- Vendor Statistics Management
- External Portal AdminConsole
- Cost Data Upload
- 360 Link AdminConsole
- Summer AdminConsole
- University AdminConsole
Manual Data Upload – Client Center

1. Gather your usage data. Navigate to the Provider’s website, login and download your usage data reports (files)

Manual Data Upload

2. Name and save the usage data file locally

### Client Center Home Page

3. **Navigate to the Client Center**, then to the Counter Reports page

<table>
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<td>Management Tools</td>
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#### Business Intelligence Tools

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<tr>
<td>Data On Demand</td>
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<tr>
<td>Management Reports</td>
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</tbody>
</table>

4. Click the Upload button on the Counter Reports page
Upload Counter Report

Select the Provider from which you downloaded the usage data file.
ExLibris has a weekly timeframe for uploading usage data from the Intota or the Client Center to Intota Assessment reporting interface:

- Data from Counter is captured weekly, every Monday at 7:00p EST
- Data entered by clients before Monday, 7:00p EST will be available in Intota Assessment Reports by Friday at 6:00p EST
View Reports in Intota Assessment

**ASSESSMENT**
- Intota Assessment
- Overlap Analysis

View Reports in Intota Assessment

**360 Counter**

- Oxford University Press
- Multiple Publishers
- EBSCO
- Gale
- Cengage Learning
- Brill
- ProQuest

View Reports in Intota Assessment
Navigate to Intota Assessment to view your successfully uploaded reports.

Next Steps and Support Resources
Next Steps and Support Resources

- Include documentation links relative to the topic:
  - Intota: Uploading Counter Reports
  - 360 Counter: Uploading Counter Reports
  - Providers Requiring Two-Factor Authentication
  - IP Authenticated Providers

- Additional support resources within the ExLibris Ecosystem:
  - Idea Exchange
  - System Status Pages: Single Tenant ENV / Multi-Tenant ENV
  - Developer Network

- Technical Seminar Presentations
  (located in the Cross-Product section of the CKC)

Q & A

Questions?
Session Survey Evaluation

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

THANK YOU