COUNTER reports in ALMA

Julie Wright - University of Adelaide
Melissa McInnes - RMIT University

2017 ANZREG Conference
AGENDA

- Why load COUNTER reports?
- Background
- Alma preparation/process
- Online Demo
- Troubleshooting
- Analytics Reports
- The Future
- Q & A
Objectives
Why do we want to load COUNTER reports in ALMA?

● Time-saving
● Timely access
● Single data location
● Usage Reports
● Cost per Use Reports
● Decision making
Background

- Previously used USTAT
  - Not available for all eJournal vendors
  - Only available for JR1 & DB1 reports
  - Could not add new SUSHI vendors

AND/OR

- Manual spreadsheets
  - Time consuming process
  - Very large spreadsheets for each resource type to make data available in a pivot table
ALMA Preparation

- Coming from USTAT OR starting new
- Report types & gathering information

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Description</th>
<th>COUNTER Release</th>
<th>Manual Upload (xlsx, xls, csv, txt, tsv formats)</th>
<th>SUSHI Harvest or Manual Upload (xml format)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BR1</td>
<td>Book Report: Successful Title Requests by Month and Title</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>BR2</td>
<td>Book Report: Successful Section Requests by Month and Title</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>BR3</td>
<td>Book Report: Access Denied to Content Items by Month, Title, and Category</td>
<td>R4</td>
<td>Planned</td>
<td>Planned</td>
</tr>
<tr>
<td>BR4</td>
<td>Book Report: Access Denied to Content Items by Month, Platform, and Category</td>
<td>R4</td>
<td>Planned</td>
<td>Planned</td>
</tr>
<tr>
<td>BR5</td>
<td>Book Report: Total searches by Month and Title</td>
<td>R4</td>
<td>Planned</td>
<td>Planned</td>
</tr>
<tr>
<td>DB1</td>
<td>Database Report: Searches, Result Clicks, and Record Views by Month and Platform</td>
<td>R3</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>DB2</td>
<td>Database Report: Access Denied by Month, Database, and Category</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>JR1</td>
<td>Journal Report: Successful Full-Text Article Requests by Month and Journal</td>
<td>R3/R4</td>
<td>Planned</td>
<td>Planned</td>
</tr>
<tr>
<td>JR1 GA</td>
<td>Journal Report: Successful Gold Open Access Full-Text Article Requests by Month and Journal</td>
<td>R3/R4</td>
<td>Planned</td>
<td>Planned</td>
</tr>
<tr>
<td>JR1a</td>
<td>Journal Report: Successful Full-Time Article Requests from an Archive by Month and Journal</td>
<td>R3/R4</td>
<td>Planned</td>
<td>Planned</td>
</tr>
<tr>
<td>JR2</td>
<td>Journal Report: Access Denied to Full-Text Articles by Month, Journal, and Category</td>
<td>R4</td>
<td>Planned</td>
<td>Planned</td>
</tr>
<tr>
<td>JR5</td>
<td>Journal Report: Successful Full-Text Article Requests by Year-of-Publication (YOP) and Journal</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>MR1</td>
<td>Multimedia Report: Successful Full Multimedia Content Unit Requests by Month and Collection</td>
<td>R4</td>
<td>Planned</td>
<td>Planned</td>
</tr>
<tr>
<td>PR1</td>
<td>Total searches, result clicks, and record views by Month and Platform (previously DB1)</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>
ALMA Preparation

- Spreadsheet to gather information
Biggest Decisions

- Which vendor to use for set up of SUSHI account/s?
- To manually upload reports to ALMA or not?
Troubleshooting
- Connection Issues
- Harvesting Issues
- Manual Load Issues
- Online SUSHI test
- Missing Data Table
- Known issues list
ALMA Processes

- Managing SUSHI accounts
- Managing SUSHI harvesting
- Manually uploading COUNTER data

ONLINE DEMONSTRATION
Analytics Reports

Need to think about what reports you need

- Usage Reports
  - Exactly what is coming from vendor/provider
  - Platform & Publisher are from vendor/provider
  - Journals report table very large
  - Show trends
  - Review most or least frequently used
Sample Usage reports
Analytics Reports

• Cost per Use Reports
  ○ Cost
  ○ Usage
  ○ Estimated Usage
  ○ Cost per Use
  ○ Metadata Type in PO Line = Journal or Package (based on Order Line Type)

• Can be used to show trends
• Review most or least expensive
• Still more investigation to be done
Sample Cost per Use reports
The Future

- Additional report types supported
- More known issues to be fixed
- Salesforce cases

- How to
  - Share new SUSHI details
  - Share issues & troubleshooting resolutions
  - Report issues

- COUNTER RELEASE 5
Further Information
COUNTER (Counting Online Usage of NeTworked Electronic Resources) compliant usage statistics is explained here:
https://www.projectcounter.org/
For more information about SUSHI:
http://www.niso.org/workrooms/sushi/
Managing COUNTER-Compliant Usage Data
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Acquisitions/090Acquisitions_Infrastructure/010Managing_Vendors/Managing_COUNTER-Compliant_Usage_Data
Usus - a community website on library usage
http://www.usus.org.uk/
Questions?

julie.wright@adelaide.edu.au
melissa.mcinnes@rmit.edu.au

THANK YOU