

# Implementing SUSHI for COUNTER 5 in Alma

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# Background

- As of January 2020, Alma is fully compliant with COUNTER release 5
- The Assessment Librarian needs reports on usage data of ebooks and ejournals

# What is SUSHI and COUNTER?

- SUSHI protocol: **S**tandardized **U**sage **S**tatistics **H**arvesting **I**nitiative
- COUNTER stands for **C**ounting **O**nline **U**sage of **N**etworked **E**lectronic **R**esources
- Counter Release 5 (R5) vs Counter Release 4 (R4)

# Planning and Timeline

- Limitation of manpower
- Limitation of time
- Divided by ebooks and ejournals
- September to November 2020 for ebooks
- March to June 2021 for ejournals
- Planner to keep track of our progress

# Instructions:

- Documents
  - [Managing COUNTER-Compliant Usage Data](#)
  - [GIL Wiki](#)
- Videos from Exlibris
  - [Adding SUSHI Account](#)
  - [COUNTER Release 5 Usage Data Harvesting in Alma and Alma Analytics](#)
  - [Reload Usage Data Files that Failed to Upload](#)

# Useful Documents While Adding Counter 5 Reports

- [Registry of compliant publishers and vendors](#)
- [Alma SUSHI-Certified Vendors](#)
- [COUNTER Report names and explanations](#)

# Roles in Alma

- Vendor Manager
- Usage Data Operator

# Example

## (Taylor & Francis)

- Log in to Alma
- Acquisition
- Vendor

**Purchase Order Lines**  
Order Without Inventory  
Review (PO line)  
Claim  
Renew  
Review Deferred  
Manage Trials  
Manage EDI Tasks

**Purchase Order (PO)**  
Package  
Review (PO)  
Approve  
Delete PO

**Purchase Requests**  
Create Purchase Request  
Manage Purchase Requests  
Check Availability and Pricing  
Receiving and Invoicing

**Import**  
Manage Import Profiles  
Import  
Monitor and View Imports  
Resolve Import Issues  
Load Usage Data  
Delete Usage Data

**Acquisitions Infrastructure**  
★ Vendors  
Funds and Ledgers  
Transfer Funds  
Move Funds In Hierarchy  
Licenses  
License Template

**Advanced Tools**  
Exchange Rates Report  
Rollover Ledgers  
Rollover PO Lines  
Rollover Resource Sharing Requests  
Patron Driven Acquisition



- i. Select Vendor
- ii. Select Usage Data tab
- iii. Select Add SUSHI Account

Vendor Details

Cancel Save

Summary Contact Information Contact People EDI Information Usage Data System Integration Invoices PO Lines Communications Attachments

Notes Analytics

SUSHI Accounts

1 - 6 of 6

+ Add SUSHI Account


Subscriber: All Report Type: All Counter Release: All


	Active	SUSHI Account	Subscriber	Counter Release	Report Type	Contact Information
1	<input checked="" type="checkbox"/>	Taylor & Francis Ebooks (Taylor and Francis Ebooks)	Kennesaw State	R5	tr_b1, tr_b2, pr, tr_b3, pr_p1, tr	-
2	<input type="checkbox"/>	Taylor & Francis	Kennesaw State	R4	JR1	-
3	<input type="checkbox"/>	Taylor & Francis	Kennesaw State	R4	PR1	-
4	<input type="checkbox"/>	Taylor & Francis	Kennesaw State	R4	JR1a	-
5	<input checked="" type="checkbox"/>	Taylor & Francis	Kennesaw State	R5	pr_p1, dr_d1, dr_d2, tr_b1, tr_b2, tr_b3, tr_j1, tr_j2, tr_j3, tr_j4	-


- Find instruction from the vendor site and/or [Registry of compliant publishers and vendors](#)

<b>COUNTER Version:</b>	5	<b>About Requestor ID:</b>	<u>Mail address of the account administrator</u>
<b>Platform:</b>	tandfonline.com	<b>About Customer ID:</b>	<u>1234567 (seven digits)</u>
<b>SUSHI Contact Name:</b>		<b>Submitted:</b>	11/01/2021
<b>SUSHI Contact Email:</b>	support@tandfonline.com		
<b>Instructions:</b>			
<b>Server URL:</b>	http://www.tandfonline.com:80/api/soap/services/SushiService/		


The highlighted fields you need to obtain from your vendor account.

 Taylor & Francis Online
 

Access provided by **Kennesaw State University Library System**


Hi Library Systems  
Your account
  Cart

[Home](#) ▶ [My Account](#) ▶ [Usage reports](#)


[Advanced search](#)

In your account
 

- Personal details
- Addresses
- Access entitlements
- New content & citation alerts
- Send request

**COUNTER 4**
COUNTER 5

### Usage reports

Our SUSHI request URL is: <https://www.tandfonline.com/api/soap/analytics/SushiService>

Your Requestor ID is: [redacted]@kennesaw.edu

Your CustomerReference ID is: [redacted]

You are managing Kennesaw State University (1800632)

# Enter account information.

## Test connection.

< SUSHI Account Details

Test Connection

Cancel

Save

### Account Identifier

SUSHI Account \* **Taylor & Francis**

Status **Active**

Vendor URL **https://www.tandfonline.com**

Override URL

Subscriber \* **Kennesaw State**

Contact Information

### Request Details

Requester ID **systemsunit@kennesaw.edu**

Requester Name

Customer ID **#####**

Customer Name

User Name

Password

Requester Email

API Key

Platform

Taylor & Francis

Vendor code

**tandf**

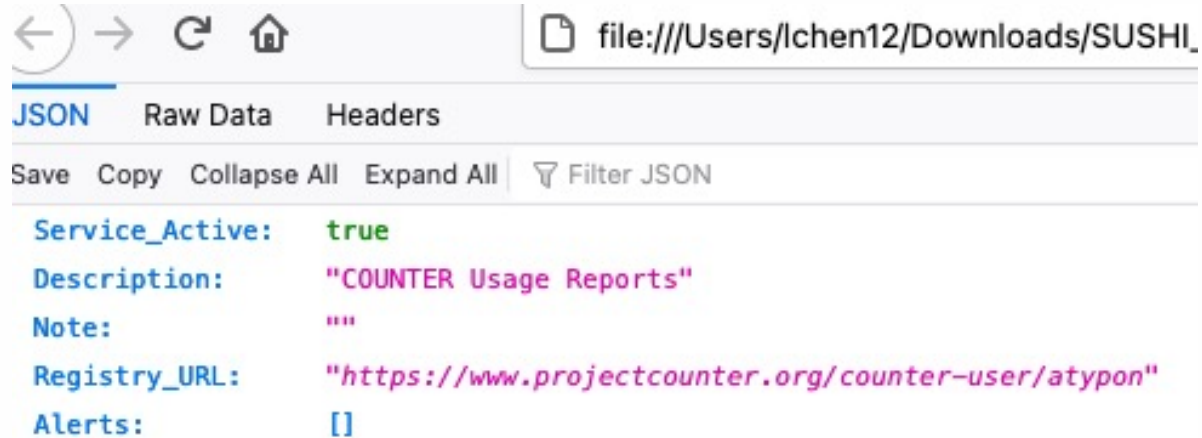
SUSHI account type

**Release 5**



**KENNESAW STATE**  
UNIVERSITY

# Connection Test



Open Json file; if `Service_active` is `true` then there is a valid connection. Sometimes there is a note about the service.

# Here are the report types available for the vendor from the Project Counter registry

## AUDITED REPORTS PRODUCED

### Release 4

Journal	Database Reports					Books Reports	Multimedia Reports	Title Reports	Consortium
Journal Report 1	Journal Report 1a	Journal Report 1 GOA	Journal Report 2	Journal Report 5					

### Release 5



Platform Master Report	Database Master Report	Title Master Report	Item Master Report
PR_P1			

## Release 5



## Release 5



-  Available reports
-  Unavailable reports

Release 5



Available reports



Unavailable reports

# Add reports

Cancel

Save

## Usage Report Types

1 - 10 of 10

[+ Add Report Type](#)



	Active	Report Type	Description	COUNTER Release	
1	<input checked="" type="checkbox"/>	pr_p1	COUNTER 'Platform Usage' [pr_p1]	R5	...
2	<input checked="" type="checkbox"/>	dr_d1	COUNTER 'Database Search and Item Usage' [DR_D1]	R5	...
3	<input checked="" type="checkbox"/>	dr_d2	COUNTER 'Database Search and Item Usage' [DR_D2]	R5	...
4	<input checked="" type="checkbox"/>	tr_b1	COUNTER 'Book Requests (Excluding OA_Gold)' [TR_B1]	R5	...
5	<input checked="" type="checkbox"/>	tr_b2	COUNTER 'Access Denied by Book' [TR_B2]	R5	...
6	<input checked="" type="checkbox"/>	tr_b3	COUNTER 'Book Usage by Access Type' [TR_B3]	R5	...
7	<input checked="" type="checkbox"/>	tr_j1	COUNTER 'Journal Requests (Excluding OA_Gold)' [TR_J1]	R5	...
8	<input checked="" type="checkbox"/>	tr_j2	COUNTER 'Access Denied by Journal' [TR_J2]	R5	...
9	<input checked="" type="checkbox"/>	tr_j3	COUNTER 'Journal Usage by Access Type' [TR_J3]	R5	...
10	<input checked="" type="checkbox"/>	tr_j4	COUNTER 'Journal Requests by YOP (Excluding OA_Gold)' [TR_J4]	R5	...

Make sure you save your work!

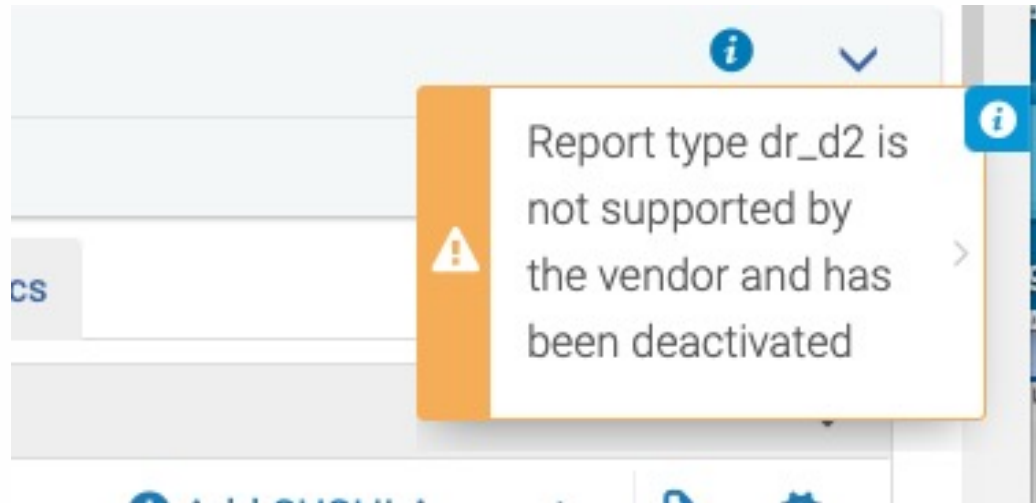


**KENNESAW STATE**  
UNIVERSITY



# Report type is wrong

- If you put a wrong report type you may get a notice that the report is deactivated



# Monthly Usage Data

galileo-kennesaw.alma.exlibrisgroup.com/ng/page;u=%2Facq%2Faction%2FpageAction.vendor.inter

Ask-A-Librarian: Add Transaction Monthly Usage Data

Physical Items LC Call Number None

Design Analytics | Data Visualization | Vendors | Load Usage Data

## Monthly Usage Data

Uploaded Files Monthly Usage Data

1 - 16 of 16 Platform

Year: 2020 Measured By: All Subscriber: All Platform: Taylor & Francis Online Clear all

Subscriber	Platform	Measured By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1 Kennesaw State	Taylor & Francis Online	PR_P1 - Platform Usage - Searches Platform	!	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
2 Kennesaw State	Taylor & Francis Online	DR_D1 - Database Search and Item Usage - Searches Automated	!	✓	✓	!	✓	!	✓	✓	✓	!	!	!
3 Kennesaw State	Taylor & Francis Online	DR_D1 - Database Search and Item Usage - Searches Regular	!	!	!	!	✓	!	!	!	!	!	!	!
4 Kennesaw State	Taylor & Francis Online	PR_P1 - Platform Usage - Total Item Requests	!	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
5 Kennesaw State	Taylor & Francis Online	DR_D1 - Database Search and Item Usage - Total Item Investigations	!	!	!	!	✓	!	!	!	!	✓	!	!
6 Kennesaw State	Taylor & Francis Online	TR_J1 - Journal Requests (Excluding OA_Gold) - Total Item Requests	!	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
7 Kennesaw State	Taylor & Francis Online	TR_J3 - Journal Usage by Access Type - Total Item Investigations	!	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
		TR_J3 - Journal Usage												

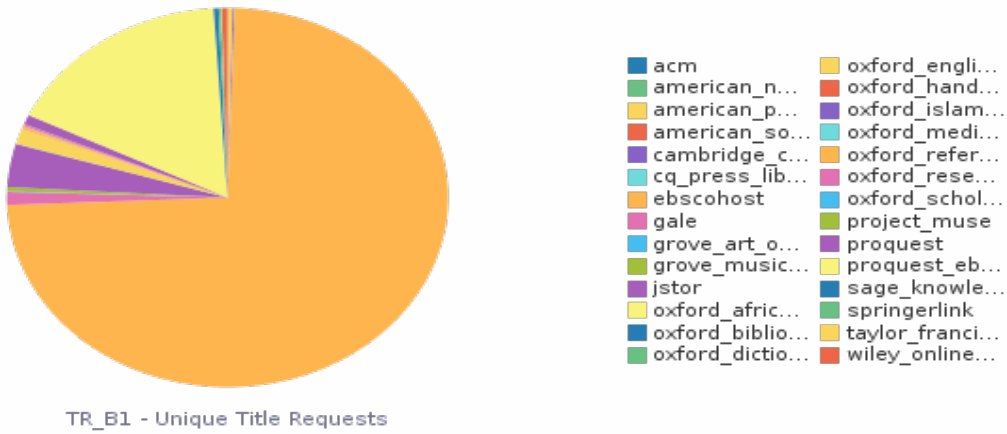
ExLibris  
© Ex Libris, a ProQuest Company, 2021

# Analytics report using R5 usage data

ACRL 61 62 | ebook usage

Normalized Platform	TR_B1 - Unique Title Requests
acm	2
american national biography	5
american psychiatric publishing	295
american society of civil engineers	6
cambridge core	99
co_ress library	6
ebshost	59,561
gale	898
grove art online	44
grove music online	280
istor	2,967
oxford african american studies center	6
oxford bibliographies	3
oxford dictionary of national biography	30
oxford english dictionary	1,097
oxford handbooks online	43
oxford islamic studies online	2
oxford medicine online	3
oxford reference	113
oxford research encyclopedias	119
oxford scholarship online	2
project muse	14
proquest	665
proquest ebook central	13,566
sage knowledge	295
springerlink	171
taylor francis ebooks	23
wiley online library	332
Grand Total	80,647

TR\_B1 - Unique Title Requests



# Review & Discussion

- Alma can gather usage data for you automatically after a one-time setup process.
  - Gather your resources ahead of time.
  - Conflicting information about credentials may require research, testing, and perseverance on your part.
- That data can be pulled into reports in Analytics.

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Questions?

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