

Visualizing COUNTER Metrics with SUSHI:

Exploring Alma Analytics for
E-Resource Evaluation

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PROJECT OVERVIEW

The goal of this project was to explore how Alma Analytics could be used for analyzing and visualizing COUNTER usage statistics. The final products included workflows, recommendations for future use, and reports created from Alma Analytics.

The project involved three parts:

1. Preparing & Organizing Data in Alma
2. Creating Documentation
3. Working in Alma Analytics

COUNTER USAGE AT ATKINS

Title Reports (TR)

Journals

TR_J1 Journal Requests (Excluding OA Gold):

- **Unique Item Requests***
- Total Item Requests

eBooks

TR_B1 Book Requests (Excluding OA Gold):

- **Unique Title Requests***
- Total Item Requests

Database Reports (DR)

Databases/Fixed Collection Content

DR Master Report:

- **Unique Item Investigations***
- **Searches Regular***
- Total Item Investigations
- Searches Automated (*sometimes*)

Please note: COUNTER metrics with a star () next to it are the preferred metric for usage analysis and for calculating cost-per-use.*

PREPARING & ORGANIZING DATA IN ALMA

SUSHI Accounts

- Setting up and Troubleshooting
- Determining proper COUNTER reports
- SUSHI or no SUSHI?

Cleaning up the Usage Data

- Removing duplicates and overlapping reports
- Harvesting missing data
- Switching out R4 with R5 reports

SUSHI harvesting job

Status Active Inactive

Schedule ▾

KEY TAKEAWAYS

Keep the 'Usage Data' tab in the Vendor accounts clean

After troubleshooting failed harvested reports, delete them to keep the information clean and free from unnecessary information.

Phase out Release 4 reports if possible

While some R4 reports can be easily compared to R5, that is not true for all of them.

Collaborate and Be Transparent.

Learn how the library uses or wants to use usage data in Alma Analytics. Let that give you direction for any prep work needed to make that happen — but be honest when something just isn't possible.

CREATING DOCUMENTATION

Analytics Workflows

- Step-by-step instructions
- Follow-along Tutorials

Other Useful Resources

- R4 to R5 crosswalk
- COUNTER compliant vendors
- Other resources

Name	R5 Compliant?	SUSHI R5 Set-up?	TR_J1?	TR_B1?
American Association for the Advancement of Science	yes	yes	yes	n/a
ABC-Clio	yes	yes	n/a	yes
Accessible Archives	yes	yes	yes	yes
ACM Digital Library	yes	yes	yes	yes
American Chemical Society	yes	yes	yes	yes
Adam Matthew Digital	yes	yes	n/a	n/a
American Economic Association	yes	yes	yes	n/a
American Institute of Physics	yes	yes	yes	n/a
Akademiai Kiado	yes	yes	yes	n/a
Alexander Street Press	yes	yes	n/a	n/a
Allen Press	yes	yes	yes	n/a
American Meteorological Society	yes	yes	yes	n/a

CREATING DOCUMENTATION KEY TAKEAWAYS

Consider your audience

Ask yourself who you are creating this documentation for and what would be the best approach for creating your workflows and documentation.

Create cheat sheets and quick reference documents

Workflows and full documentation are great, but sometimes you just need a quick reminder on something without looking through lengthy document.

Stay organized

Keep a spreadsheet of your COUNTER compliant vendors, what reports correspond to them, and if they have SUSHI accounts.

WORKING IN ALMA ANALYTICS

Learning the ways of Analytics

- Trial & error
- Choosing appropriate fields and filters
- Discovering the possibilities and limitations

Collaborating with key constituents

- What type of reports is the library looking for?
- How do they hope to use Analytics for COUNTER?

SAMPLE REPORT 1: JOURNAL USAGE & TITLE COUNT

Title



Journal Usage for Current Subscriptions (Full Year)

Journal Usage x Vendor



	Journal Usage (Unique)				
Vendor Name	2019	2020	2021	Total Usage	Average Usage
Vendor A	12	9,921	8,943	18,876	6,292
Vendor B	1,743	570	189	2,502	834
Vendor C		13	69	82	41
Vendor D		464	597	1,061	531
Vendor E			1,201	1,201	1,201
Vendor F	21,190	20,047	22,763	64,000	21,333
Vendor G	1,049	715	641	2,405	802

Vendor: Journal Title Count



	Title Count		
Vendor Name	2019	2020	2021
Vendor A	6	105	96
Vendor B	51	35	28
Vendor C		4	3
Vendor D		25	26
Vendor E			3
Vendor F	63	69	72
Vendor G	9	9	9

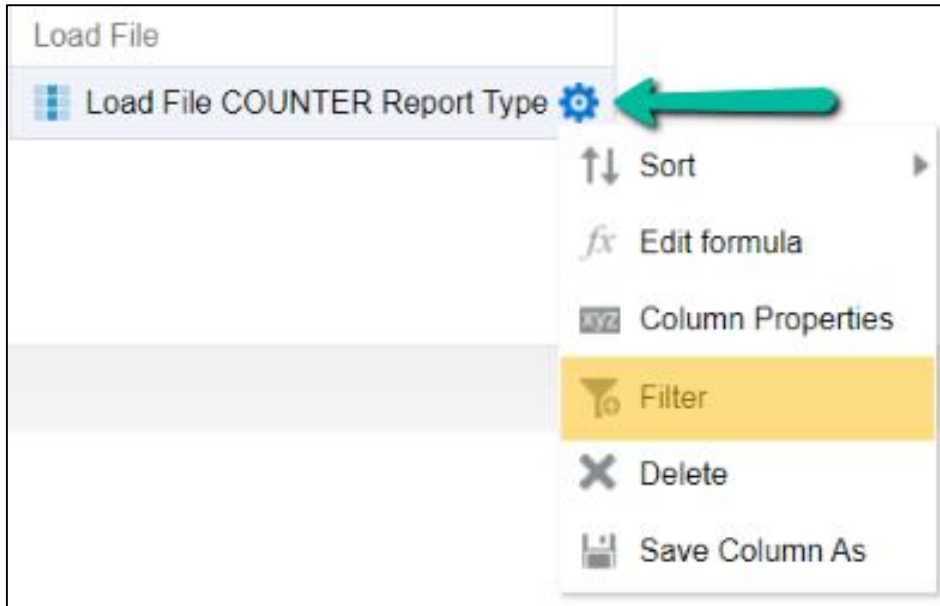
SAMPLE REPORT 1: JOURNAL USAGE WITH PUBLISHER USING A TABLE PROMPT

TABLE PROMPTS

Allows you to filter your report using a drop-down menu to quickly view the information you need.

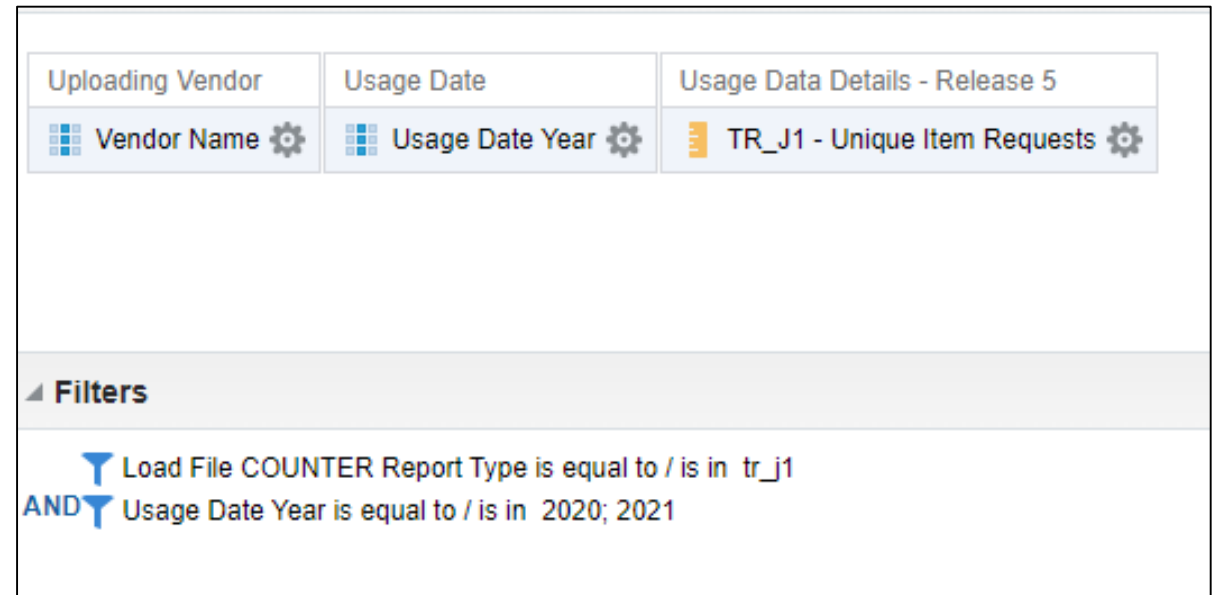
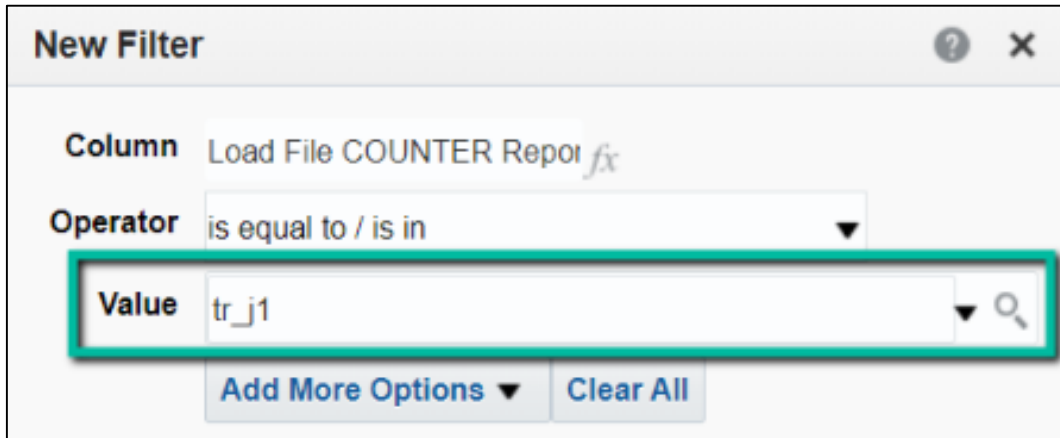
Vendor Name

		Journal Usage (Unique)				
Vendor Name	Publisher	2019	2020	2021	Total Usage	Average Usage
Vendor A	Publisher A	2,269	1,493	1,041	4,803	1,601
	Publisher B	840	462	600	1,902	634
	Publisher C	180	43	54	277	92
	Publisher D	5,327	2,949	2,103	10,379	3,460
	Publisher E	255	209	223	687	229
	Publisher F	21	8	17	46	15
	Publisher G	1,058	1,189	1,142	3,389	1,130
	Publisher H	201	94	126	421	140
	Publisher I	153	78	59	290	97
	Publisher J	3,116	1,751	2,502	7,369	2,456
	Publisher K	11	14	21	46	15
	Publisher L	15	27	22	64	21
	Publisher M	28	20	44	92	31
Vendor A Total		13,474	8,337	7,954	29,765	9,922



FILTERS

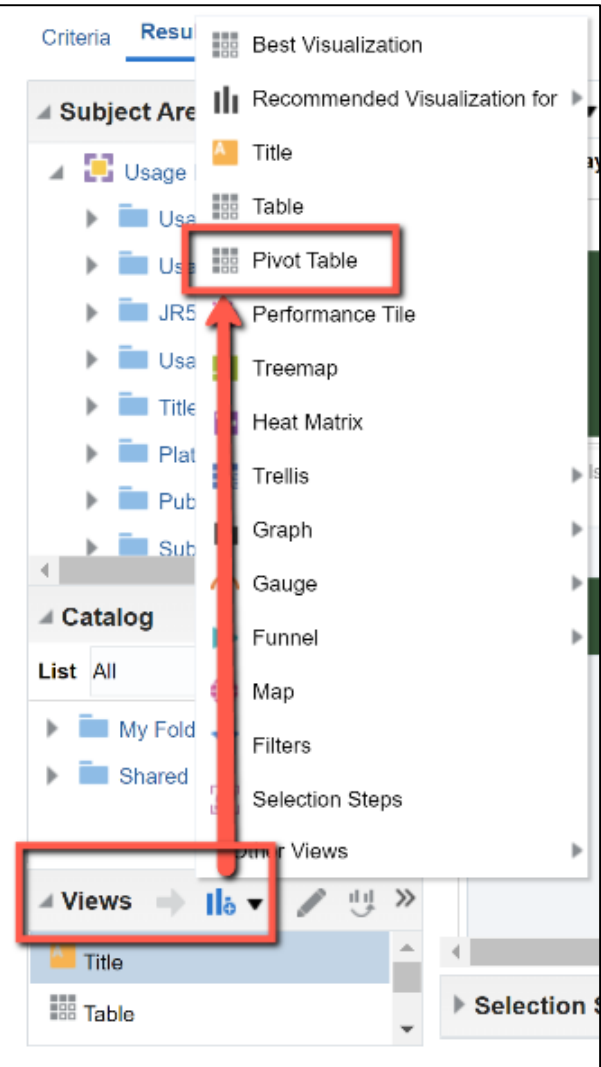
If you want to make a report that is about one vendor or one type of resource (journals, eBooks, etc.), filtering can be used to limit the information the report will display.



SAMPLE REPORT 2: DATABASE USAGE

PIVOT TABLES

Allows for a less cluttered report and you can organize the display of the data to your preferences.



Database Usage (Investigations) Full Year											
		Unique Item Investigations					Total Item Investigations				
Vendor Name	Display Title	2019	2020	2021	Total	Average	2019	2020	2021	Total	Average
Vendor A	Database A		50	77	127	64		134	162	296	148
	Database B		33	8	41	21		116	14	130	65
	Database C			19	19	19			24	24	24
	Database D		36	108	144	72		75	154	229	115
	Database E		7	140	147	74		15	161	176	88
	Database F		3	39	42	21		17	45	62	31

DEFAULT TABLE VIEW VS PIVOT TABLE VIEW

Default Table View

Vendor Name	Display Title	▲▼ Unique Item Investigations	Usage Date Year	Total Item Investigations
Vendor A	Database A	50	2020	134
		77	2021	162
		127	Total	296
		64	Average	148
	Database B	33	2020	116
		8	2021	14
		41	Total	130
		21	Average	65

Pivot Table View

Database Usage (Investigations) Full Year											
		Unique Item Investigations					Total Item Investigations				
Vendor Name	Display Title	2019	2020	2021	Total	Average	2019	2020	2021	Total	Average
Vendor A	Database A		50	77	127	64		134	162	296	148
	Database B		33	8	41	21		116	14	130	65
	Database C			19	19	19			24	24	24
	Database D		36	108	144	72		75	154	229	115
	Database E		7	140	147	74		15	161	176	88
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JOURNAL TITLE USAGE QUICK SEARCH

Journal Title Usage (Fiscal Year)

Select the fiscal year(s) and month(s) you would like to view usage for.

Fill in the ISSN or EISSN fields to view usage for a specific journal. You can also leave these fields blank if you want to view journal usage for an entire vendor.

ISSN #

EISSN #

Fiscal Year

Month

Vendor Name

COUNTER Metric

[Refresh](#)

			FY2020 Total	FY2021		
April	May	June		July	August	September
4	5	5	113	1	1	2
Rerun the Report						

KEY TAKEAWAYS

Use Pivot Tables.

Pivot tables will let you organize your information in a way that makes sense to you without cluttering up the report and it will look much nicer in Excel or Google Sheets if you decide to export it.

Create custom formulas and calculations.

No need to export the information into a spreadsheet to calculate averages or totals when you can do it right in Analytics. You can also rename your columns, combine columns and rows, and group things together.

Learn, Experiment, and Be Patient.

Learn where everything you need in Analytics is located and take time to experiment with making reports. Be patient with yourself and take a “brain break” when you need it.



THANK YOU

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