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## Making the Most of SUSHI in Alma: Tips for Smooth Maintenance and Reporting

Marie Day

Kennesaw State University, marieday752@gmail.com

Laura Beane

Kennesaw State University, lbeane@kennesaw.edu

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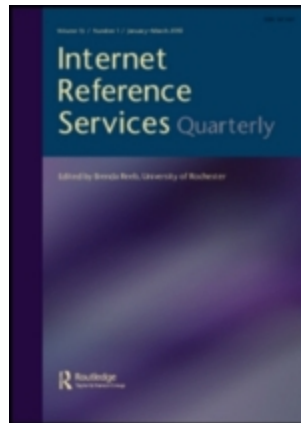
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### **Making the Most of SUSHI in Alma: Tips for Smooth Maintenance and Reporting**

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## Making the Most of SUSHI in Alma: Tips for Smooth Maintenance and Reporting

Abstract: SUSHI is a widely used protocol in academic libraries. This article discusses maintaining SUSHI vendor accounts in Alma, troubleshooting irregularities, and finding technical support. This article also includes sample analyses for the ACRL survey 60B Digital/Electronic Circulation or Usage and 63 E-serials Usage using COUNTER 5 reports.

Keywords: usage stats; business intelligence; library automation; academic libraries

Subject classification codes: 519120 Libraries and Archives

### Introduction

The SUSHI protocol to harvest COUNTER usage reports from publishers is a labor-saving feature of Alma, a popular library services platform from Ex Libris (part of Clarivate) that is used worldwide. In this article we will discuss our experience maintaining SUSHI accounts in an academic library setting, including how to use Alma and Alma Analytics and determining where to focus limited time on upkeep. We account for some common inaccuracies in data and provide strategies to repair SUSHI vendor accounts. We point to resources for troubleshooting and becoming aware of potential problems. We also share examples using the resulting data in analyses for national reporting requirements.

SUSHI (Standardized Usage Statistics Harvesting Initiative) is an ANSI/NISO Standard for harvesting e-resource usage data (NISO, 2023). SUSHI is an API, a standard for software developers, that enables automatic retrieval of usage reports for a particular library or consortium (COUNTER, n.d.). While there are articles and presentations available to librarians about what SUSHI is and how to implement it in

1  
2  
3 Alma for major vendors, there are few articles on maintaining or troubleshooting the  
4  
5 harvesting process or the usage data.  
6  
7

### 8 9 **Setting up SUSHI in Alma**

10  
11 Alma is fully compliant with COUNTER Release 5 as of the January 2020 release (Ex  
12  
13 Libris, 2020). COUNTER is a joint effort that “provides the Code of Practice that  
14  
15 enables publishers and vendors to report usage of their electronic resources in a  
16  
17 consistent way. This enables libraries to compare data received from different  
18  
19 publishers and vendors” (COUNTER, n.d.).  
20  
21

22  
23 Chen and Day (2021) provide links to documentation and suggestions about  
24  
25 planning the project and implementing the protocol; they conclude that implementing  
26  
27 SUSHI is a realistic project for most libraries using Alma as their LSP. Boardman  
28  
29 (2023) discusses SUSHI account set-up as “user-friendly” and “quick.”  
30  
31

32  
33 Every computer system and program will require adjustments to be made from  
34  
35 time to time for various reasons; therefore, it is reasonable to expect that maintenance  
36  
37 will be required and prudent to factor it into your workload.  
38  
39

### 40 41 **Troubleshooting SUSHI**

42  
43 As with any complex process, problems may occur; it is unreasonable to expect that  
44  
45 multiple feeds from multiple vendors over months and years will run indefinitely  
46  
47 maintenance-free. Vendors change platforms, usage reports may change to a non-  
48  
49 COUNTER-compliant format, Alma has failed loads, etc.  
50  
51

52  
53 When you realize that the usage data in Alma is not what you expected, the  
54  
55 process of troubleshooting begins. According to Talbott and Zmau (2020),  
56  
57 troubleshooting is a specialized form of problem solving (p. 1). Troubleshooting  
58  
59 generally has four stages of understanding the problem: evaluating options and planning  
60

1  
2  
3 a solution, implementing a solution, and reviewing the results (p. 4-5). They state that  
4  
5 “[t]he biggest differentiator in success between a novice and an expert troubleshooter is  
6  
7 level of technical knowledge, but troubleshooters can further increase their effectiveness  
8  
9 by learning various troubleshooting strategies and methodologies.” (p. 10) We agree  
10  
11 that “internal qualities like motivation, curiosity, and cognitive flexibility also play an  
12  
13 important role. A can-do attitude along with patience and perseverance are important  
14  
15 factors in success; fortunately, these are qualities that human beings can decide to have  
16  
17 and put towards their and their organization’s goals.”  
18  
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22

### 23 **Common problems**

#### 24 ***Your SUSHI connection is not working***

25  
26 Under the Usage Data SUSHI connection for the vendor, there is an option to test the  
27  
28 connection. The response comes back from the vendor in the form of a JSON file,  
29  
30 which the Firefox browser can open in a human-readable format. If that connection  
31  
32 status comes back as “true” then you are up and running (Figure 1). However, if it  
33  
34 comes back as failed or disconnected (Figure 2), then you have to do some  
35  
36 troubleshooting to reconnect your vendor data to Alma. The first step in doing this is to  
37  
38 check that the elements in the Account Identifier and Request Details section of your  
39  
40 SUSHI account are correct. Compare this information with the information from the  
41  
42 vendor, which is usually found somewhere in the password-protected librarian  
43  
44 administration site provided by most large publishers. Save the updated information and  
45  
46 test the connection again. Usually this will solve the problem and the test will come  
47  
48 back as “true”.  
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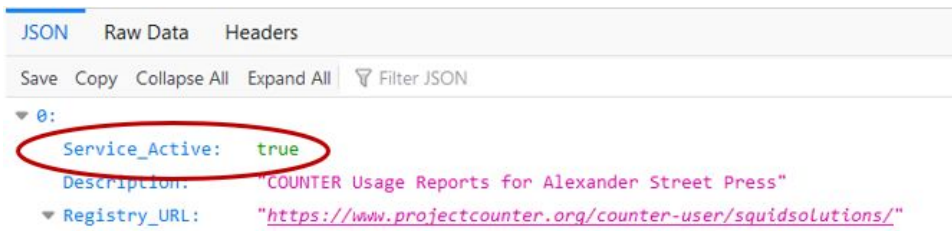


Figure 1. Connection Status “true”

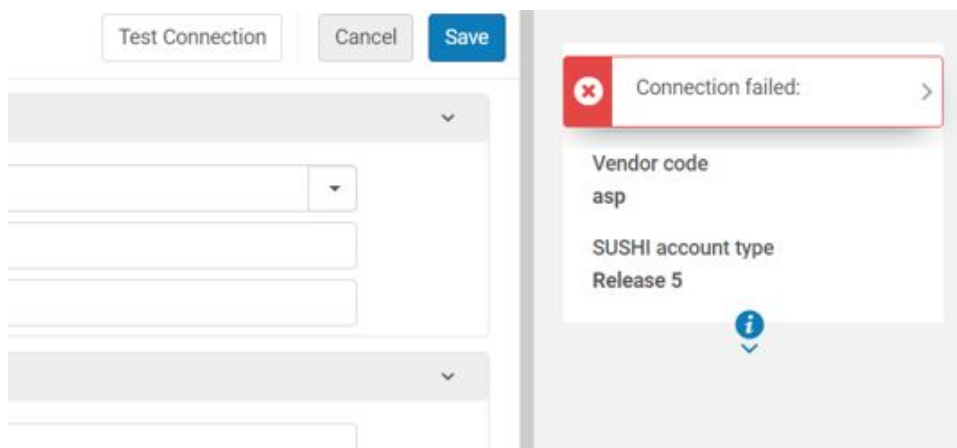


Figure 2. Connection failed

### ***Your SUSHI account has incomplete data***

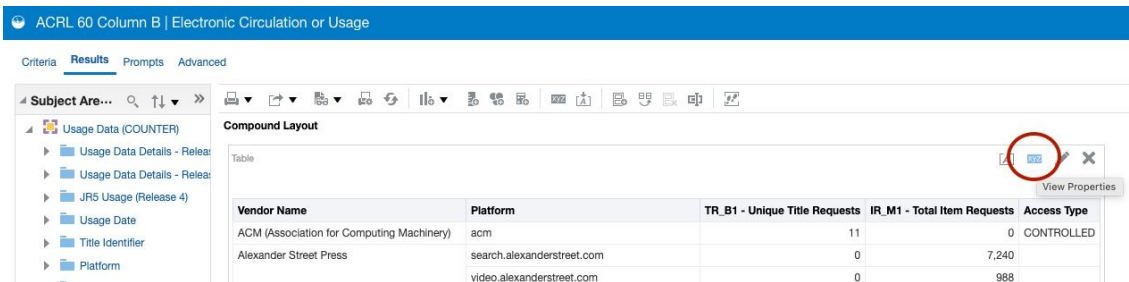
If your connection has been out for a long time, then you may need to harvest the SUSHI report again. Doing so will rerun the report and ensure that the data is available from that particular SUSHI connection. A Custom Harvest allows you to select the exact date range that you would like the report to pull the data from. This option is useful because you can pull any date range and be sure that the data will pull from your new connection. Alma states that “If the selected date range contains months previously uploaded to Alma, these will be overridden.” (Ex Libris n.d.b) This process is useful for months when the connection was not working correctly so that the new, correct data is stored for future use.

### *Vendor updates*

To effectively monitor and manage the electronic resource usage data gathered, the employee tasked with SUSHI account administration would ideally have access to the institutional account credentials permitting log-in to the administrative platforms of the relevant content providers. Should they not have this access, then they would need to work closely with the person who does, which would considerably slow the process of troubleshooting.

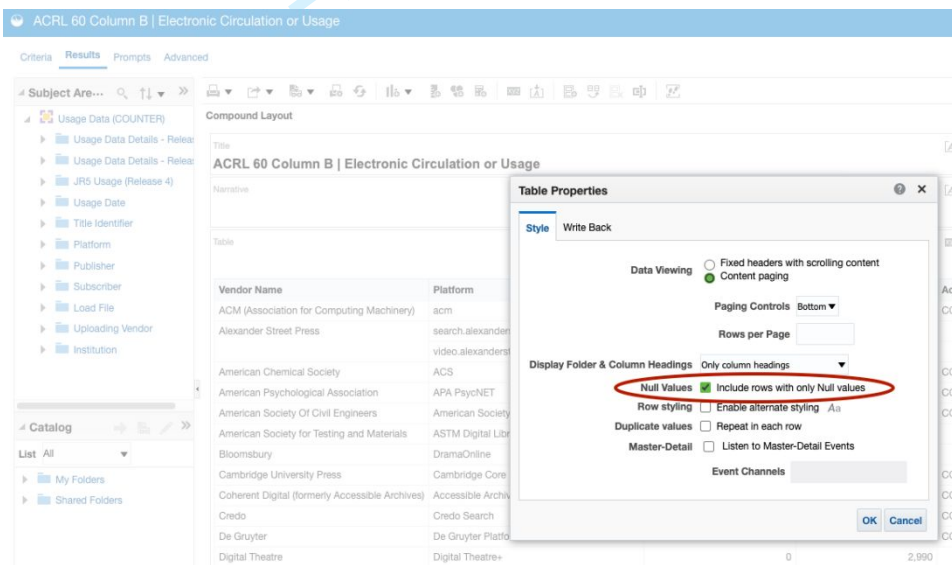
Many publishers rely on a subcontractor for usage statistics, and it may happen that vendors make platform changes without notification or with the notification failing to reach the library employee who handles the SUSHI accounts. For example, when pulling this year's reports for the ACRL Benchmark Survey, we found no usage from a well-known university press showing up under TR\_J1 for 63, E-Serial Usage. When we logged in to our institutional account on the vendor site, we pulled a report on the vendor usage data site for our last fiscal year and found quite a bit of usage. We also found that our Requestor and Customer IDs were different than what was in Alma. In the end, it turned out that we had failed to update our SUSHI credentials after the vendor updated their platform. Although our SUSHI accounts in Alma were still returning a true value, no usage for TR\_J1 had been available. This circumstance was frustrating, because we had already checked that our SUSHI accounts were working. It was only because we knew that that particular vendor should show up in the list that we caught the error. Our experience in Alma Analytics is that if there are no items in a category, the category will be absent from reports. That is, the category will *not* show up with its name and a zero or null indication; it will simply be excluded entirely. This circumstance could possibly even result in an error instead of a results table being

generated in some reports. In some cases, selecting “Include rows with only Null values” in the table properties may be helpful (Figures 3 and 4).



Vendor Name	Platform	TR_B1 - Unique Title Requests	IR_M1 - Total Item Requests	Access Type
ACM (Association for Computing Machinery)	acm	11	0	CONTROLLED
Alexander Street Press	search.alexanderstreet.com	0	7,240	
	video.alexanderstreet.com	0	988	

Figure 3. View Table Properties



Vendor Name	Platform	TR_B1 - Unique Title Requests	IR_M1 - Total Item Requests	Access Type
ACM (Association for Computing Machinery)	acm	11	0	CONTROLLED
Alexander Street Press	search.alexanderstreet.com	0	7,240	
Alexander Street Press	video.alexanderstreet.com	0	988	
American Chemical Society	ACS			
American Psychological Association	APA PsycNET			
American Society of Civil Engineers	American Society			
American Society for Testing and Materials	ASTM Digital Libr			
Bloomsbury	DramaOnline			
Cambridge University Press	Cambridge Core			
Coherent Digital (formerly Accessible Archives)	Accessible Archiv			
Credo	Credo Search			
De Gruyter	De Gruyter Platfo			
Digital Theatre	Digital Theatre+	0	2,990	

Figure 4. Null Values under Table Properties

### ***Manually adding COUNTER 5 reports:***

Due to the fact that not all vendors allow the use of APIs for automated harvesting of usage data, manual uploading of COUNTER data may need to be carried out in some cases. While it is possible to upload nonstandardized datasets, incorporating such heterogeneous data into usage reports would amount to an “apples to oranges” comparison that compromises the integrity of the results. In order to provide a



statistically valid and methodologically sound comparison across providers, adhering to accepted data standards is advisable when aggregating multi-vendor usage trends.

In Alma most of the SUSHI account information is added under the Vendor in the Usage Data tab. However, manually uploaded COUNTER 5 data is a little different. You can manually add data under Acquisitions and then Load Usage Data. On the Uploaded Files tab of the Usage Data Loader, simply select “Upload File” and enter the following information. First, Vendor. Select the vendor associated with the uploaded data. This often will not be a SUSHI vendor since we are manually uploading their COUNTER 5 data, but it can be a SUSHI vendor if you want to manually upload their data for some reason. For example, this can be useful if the SUSHI connection is not working as you expect and you want to manually upload their data instead. Next upload your file that contains the COUNTER data. Then select the subscriber (i.e., your institution). Finally select “Upload File” and the data will be imported into Alma (Figure 5).

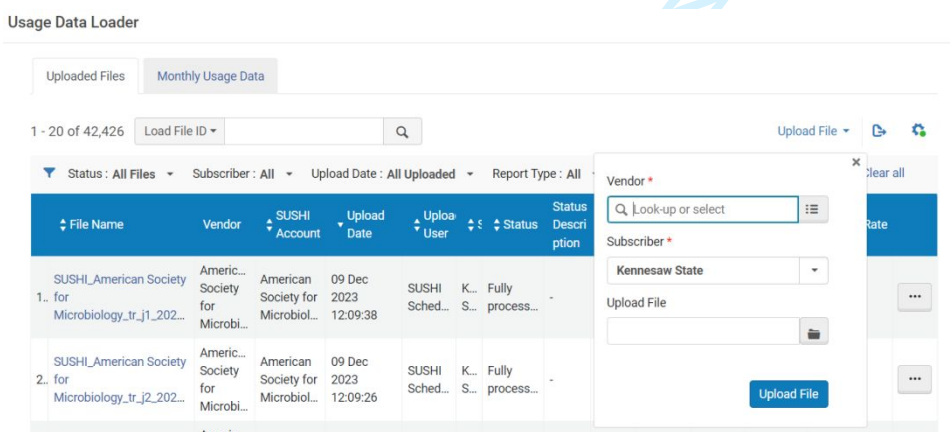


Figure 5. Manually uploading usage data

Another area where you can upload data is under the vendor details in the Usage Data tab. There is a section below SUSHI accounts that shows uploaded files. It also is a good place to check on the list of uploaded files for that vendor.

### ***Why are my columns in a different order than I put them in?***

In Alma Analytics, columns laid out in the Criteria view may appear in a different order in the Results view. The order that your columns appear can be important to the integrity of your results. Changes made to the order of fields in the criteria tab may only save before the report is initially run; once it has been run, changes may need to be made in the Results tab.

To fix the order, go into the edit table option in the Results tab. From here, under Layout in the Columns and Measures area, you can click and drag to rearrange your columns as you need. Once you click Done, that layout is saved. You can also drag and drop columns in the Results view. Be sure to click Save (a diskette icon) in the top right-hand corner or use the keyboard shortcut (Ctrl + S or Cmd + S).

### ***Aggregation rules and where to find them***

Aggregation rules define how your data is grouped in Alma Analytics. This can be done using Sum, Count, Average, etc. A common way this feature shows up is in the form of totals at the bottom of a report. Using Aggregation in your reports can be an effective way to check that your SUSHI accounts are all connected and pulling data correctly. For example, when you have the grand total for the month or year you can quickly compare the data in Alma Analytics with the vendor data directly. If there is a large difference, typically something is wrong with the connection or the loaded files.

Verifying the aggregation rule in your report is a simple step that can be easily missed in Alma Analytics (Figure 6), especially if you lack previous training or experience as a data analyst. In addition to gaining familiarity with possibilities for data manipulation by using the software, it is worthwhile to seek out training if analyzing data is a part of your daily work. Professional development workshops in statistics, data

visualization, and the like are becoming more common. Professional service opportunities may also be available that will bring one in contact with others working in this rapidly expanding area.

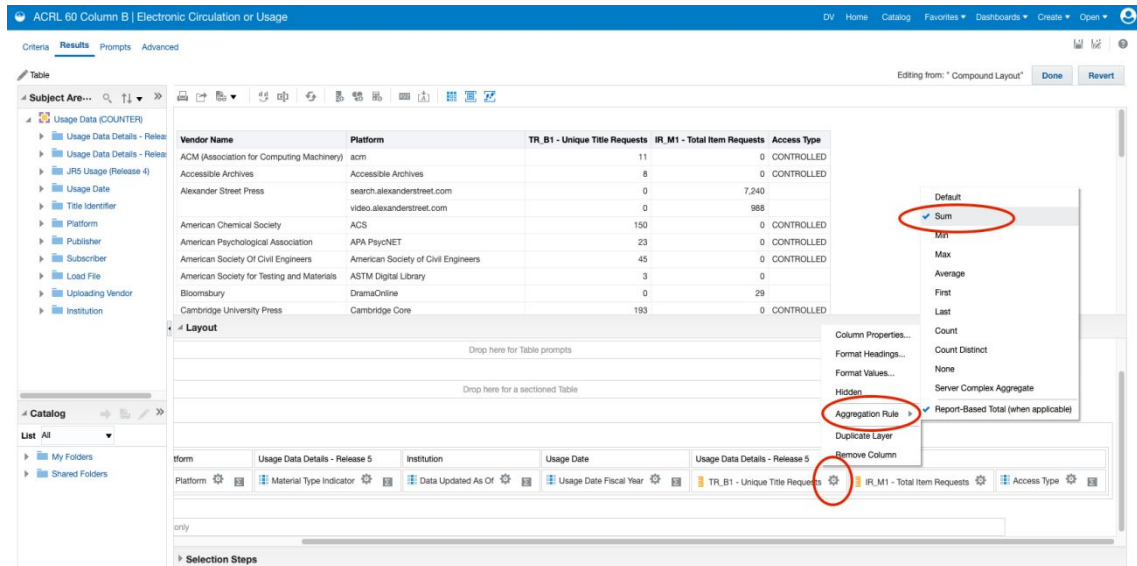


Figure 6. Choosing the aggregation rule from the results pane

One indicator that the aggregation rule needs to be adjusted is that grand totals are incorrect. You may use a calculator or MS Excel to total an exported spreadsheet. The default aggregation is not always SUM (Ex Libris, 2019).

The aggregation rule setting may be a significant cause of errors in library reporting. During testing of the ACRL/IPEDS dashboard added in the June 2023 Release in order to optimize it for use by our consortium, I [MD] found that the performance tile did not necessarily reflect the title count of the report, and in fact, did not match any of the aggregation rules at all, even after I deselected the option to round the number off for display. It was only after I specified the aggregation rule to be SUM that the actual total appeared at the bottom of the results table and in the performance tile.

1  
2  
3 To incorporate totals, subtotals, and additional elements into your report, go to  
4  
5 “Edit View” on the results tab of your report. If the Results view is inaccessible, the  
6  
7 alternative is in the Criteria Tab, where you would select the column that requires  
8  
9 totalling, followed by selecting “edit formula”. Subsequently, navigate to the dropdown  
10  
11 menu for “Aggregation Rule (Totals Row)” and select “SUM”. This sequence of actions  
12  
13 will ensure the successful addition of totals and subtotals to your report (Ex Libris, 2019  
14  
15 October).

#### 20 21 *Grand Totals:*

22 Under Columns and Measures, select the  $\Sigma$  [sigma] button directly to the right of  
23  
24 the “Columns and Measures” heading and choose “After”. This will add a “Grand  
25  
26 Total” row at the very bottom of the sheet after all of the data.  
27  
28

#### 29 30 31 *Subtotals:*

32 Like Grand Totals except you select the  $\Sigma$  button next to the column name that  
33  
34 you want the subtotal to be applied after. This will add a subtotal after items in the  
35  
36 specified column.  
37  
38

#### 39 40 41 *Other Aggregation:*

42 When you select the  $\Sigma$  [sigma] button, it will automatically add a subtotal at the end of  
43  
44 your columns at the level you set it to based on your specifications. However,  
45  
46 sometimes you may want a different form of aggregation such as Average, Count, Min,  
47  
48 or Max. To do this, you can click the gear button next to the column names and select  
49  
50 “Aggregation Rule” and choose which option you want to see. This can be really useful  
51  
52 when counting or adding a total to a non-numeric field.  
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3 Examples of adding totals, subtotals, and specifying the aggregation rule are  
4 available online at  
5  
6  
7 [https://knowledge.exlibrisgroup.com/Alma/Knowledge\\_Articles/Adding\\_Totals\\_and\\_S](https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Adding_Totals_and_S)  
8 [ubtotals\\_to\\_Analytics\\_Report\\_Tables](https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Adding_Totals_and_S)  
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### 16 **Routine maintenance**

17  
18  
19 Generally speaking, SUSHI is smooth automated process in Alma that saves a great  
20 deal of time and labor visiting multiple vendor sites. However, problems involving  
21 SUSHI are not patron-facing problems and may not be brought to our attention by an  
22 external source, such as a vendor or supervisor. How will problems come to our  
23 attention? We check our accounts at least once a year as well as when vendors notify us  
24 of changes; however, some follow their uploads much more closely. It is worthwhile  
25 seeking out examples from conference presentations and discussion lists (discussed in  
26 more detail below). There is a gap in the literature here that many librarians and library  
27 workers would like to see filled.  
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40 Based on our experience at a university library system, we created a method to  
41 look for a breakdown in the harvesting process before using the data for our annual  
42 ACRL reports by using statistical analysis to find outliers in the usage data (Stanley &  
43 Day, 2022). Outliers are data points that differ significantly from the others in the data  
44 set and are calculated in Excel. Using outliers to find possible problems in our harvested  
45 usage data allows us to investigate those platforms that seem to have anomalous data  
46 instead of double-checking every single platform.  
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55 Boardman argues that “one tedious drawback is that there is currently no option  
56 to delete files in bulk (2023).” Deleting more than one file at a time is a planned  
57  
58  
59  
60

proposal on the Ex Libris Idea Exchange to be implemented in February 2024 (Ex Libris, 2023b). The Load Usage Data page under Acquisitions > Import is where unsuccessful or incorrect files can be deleted; finally, select “Upload File” and the data will be imported into Alma (Figure 7). Note that this screen is called “Load Usage Data” in the menu and “Usage Data Loader” on the opened page.

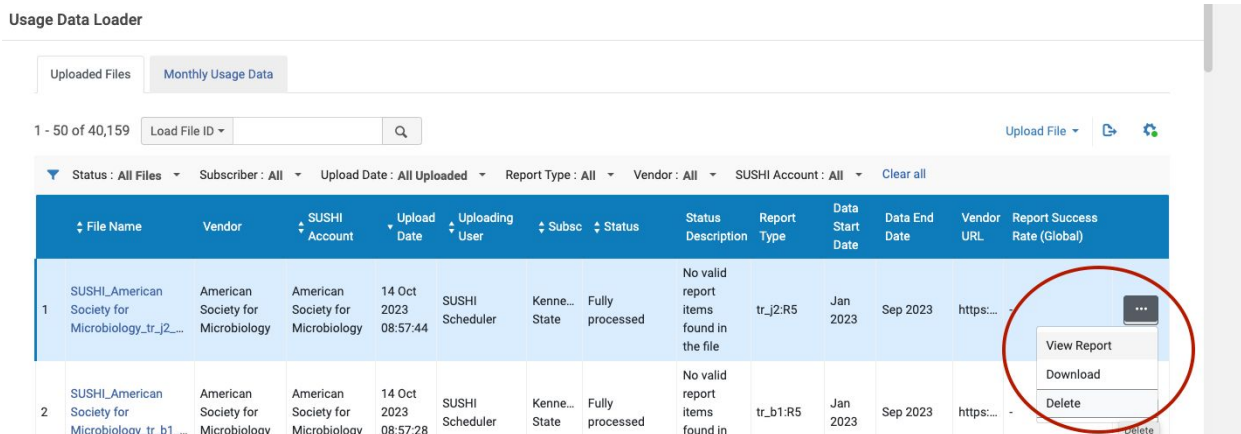


Figure 7. Usage Data Loader

Files can also be individually deleted from the Vendor Details > Usage Data tab under the menu Acquisitions / Acquisitions Infrastructure (Figure 8).

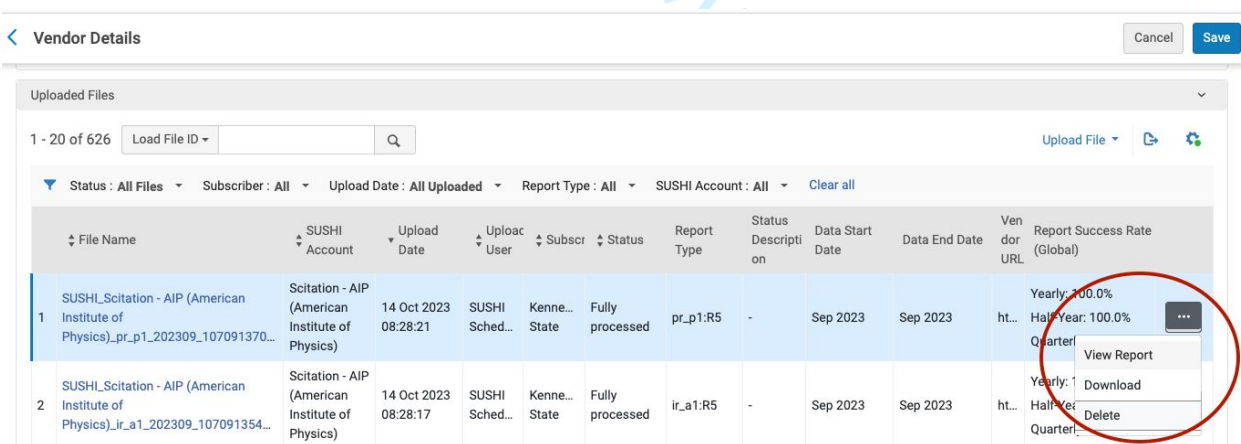


Figure 8. Vendor Details

The Load Usage Data option under the Acquisitions menu has two tabs: Uploaded Files and Monthly Usage Data. Instances of uploaded files can be searched by the Load File ID (assigned by Alma), the Uploading User (including SUSHI Scheduler),

the Upload Method, and File Name (Figure 9). Files also can be downloaded from this page. (Ex Libris, n.d.b)

Usage Data Loader

Uploaded Files Monthly Usage Data

1 - 50 of 40,159

Load File ID

Status: All

Upload Date: All Uploaded

Report Type: All

Vendor: All

SUSHI Account: All

Clear all

File Name	Upload Method	SUSHI Account	Upload Date	Uploading User	Subs	Status	Status Description	Report Type	Data Start Date	Data End Date	Vendor URL	Report Success Rate (Global)
1 SUSHI_American Society for Microbiology_tr_j...	American Society for Microbiolo...	American Society for Microbiolo...	14 Oct 2023 08:57:...	SUSHI Scheduler	Kenn... State	Fully processed	No valid report items found in the file	tr_j2:R5	Jan 2023	Sep 2023	http...	-

Figure 9. Usage Data Loader search options in Alma

The Monthly Usage Data tab shows green, yellow, or red icons for a quick overview of a successfully uploaded file (green tick mark), a successful connection without data (yellow exclamation point), or an unsuccessful attempt to connect to the vendor (red exclamation point) according to Ex Libris (n.d.b). While this page gives a nice visual overview of the situation, some find that it is not to their liking and create custom reports to run an overview of the uploaded files from the Usage Data (COUNTER) subject area. An out-of-the-box dashboard that may be useful is the Monthly Usage Data dashboard at Alma > Usage via COUNTER Reports – Release 5 > Dashboards > Monthly Usage Data. It shows a 1 for every loaded file and allows you to click for details about the file, such as platform, load file ID, and material type indicator (Figure 10).

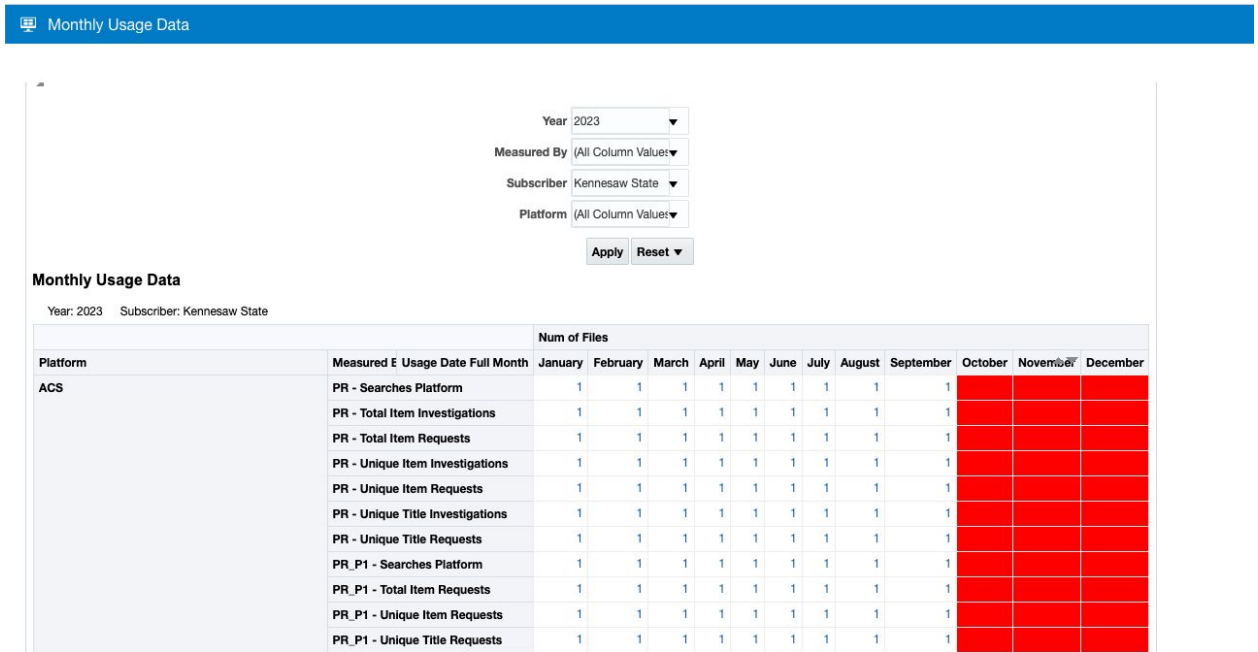


Figure 10. Monthly Usage Data dashboard

Chen (2023) reports having had to overwrite data and questions whether the accuracy of the data in Alma Analytics can be relied upon. We have also found that the SUSHI data in our instance is not without flaws and that checking, upkeep, and maintenance is required. Fitchett (2023) reports that “Currently Alma requires the error message to completely follow the standard before they accept that it’s an error message. If so, they’ll flag the job to try it again later, and all’s well. If not, it’s treated as if it was successfully harvested and we’re stuck with a “0” unless we run the job manually later.” Ex Libris had scheduled a fix as of this writing (Fitchett, 2023). Ralph (2023) gives examples of criteria to use in constructing Alma Analytics reports for determining if there is a complaint vendor in the Community Zone not yet enabled as well as which reports are currently being pulled.

As the reader may deduce from this discussion, finding and fixing the errors depends on details that would escape the casual user of Alma. Indeed, valid analyses in Alma Analytics may produce erroneous numbers for this reason (which is only one of many). The axiom *garbage in; garbage out* applies.



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2  
3 Libraries, in considering the e-resource lifecycle, will benefit from setting  
4 expectations around how much accuracy is expected. In this time of big data and  
5 pressure to show results on dashboards, there are limits on how much time and attention  
6 that personnel can spend on troubleshooting the finer details. An automated process  
7 cannot be considered a useful addition to the workflow if it requires more than  
8 occasional attention.  
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### 18 **Documentation**

19  
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21 The Ex Libris Knowledge Center page entitled “Troubleshooting Tips for COUNTER 5  
22 SUSHI Harvesting” includes five sections on steps to take as well as links to additional  
23 resources (Ex Libris, 2020). The page “SUSHI files are fully harvested but data is  
24 missing” provides step-by-step instructions on how to remove and replace files that are  
25 incomplete (Ex Libris, 2019, March). Before contacting customer service, it is  
26 worthwhile to find out if other libraries are having a similar problem. Online discussion  
27 lists are well-suited to this purpose.  
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### 39 **Discussion lists for Alma and Alma Analytics**

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41 Joining an active online discussion group has both tangible and intangible benefits.  
42 Being part of the professional community of librarians allows us to benefit from a wide  
43 range of experience and expertise, in part because Alma is used by many libraries  
44 worldwide, and in part because the library profession is characterized by collegial,  
45 supportive, and collaborative interactions. Community members may be regular or  
46 irregular posters; however, most questions will receive a useful answer in a short period  
47 of time. It is hard to underestimate the time saved and grief avoided when one finds the  
48 answer to a problem--that may be local or systemwide--on a worldwide discussion list.  
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3 The Ex Libris user community discussion list for Alma may be accessed at  
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5 <https://exlibrisusers.org/postorius/lists/alma.exlibrisusers.org/> Once an account has been  
6  
7 created, the archive can be searched by keyword. The IGeLU/ELUNA Analytics  
8  
9 Community of Practice < [Analytics – IGeLU](https://exlibrisusers.org/postorius/lists/analytics.exlibrisusers.org/)> maintains a discussion list and archives  
10  
11 at <https://exlibrisusers.org/postorius/lists/analytics.exlibrisusers.org/> Concerns include  
12  
13 data understanding, data access, evidence gathering, and education and advocacy.  
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16  
17 Subjects on the discussion list range from a simple “how do I do this particular  
18  
19 thing?” to very complex reporting questions. For example, a recent message titled  
20  
21 “SUSHI error messages - when to double check” resulted in several tips and sample  
22  
23 reports being shared (Lee, 2023). And another led to several suggestions for reading and  
24  
25 using JSON files (O’Brien, 2023). It may also be that the connection information  
26  
27 available to you in the documentation doesn’t work; for example, one person reported  
28  
29 receiving no reports from a particular university press, and others replied that they had  
30  
31 had to use an override URL (Hammons, 2023).  
32  
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34  
35 In reading posts, it becomes clear that some libraries have more expertise, time,  
36  
37 and attention devoted to this area than others. While discussion lists cannot replace  
38  
39 devoting time and attention and developing expertise with SUSHI vendor accounts and  
40  
41 files, they can be a source of early warning about problems with data. The value of the  
42  
43 combined experience shared is certainly worth the time spent sorting through the large  
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45 volume of messages.  
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### 50 **Using Alma Analytics**

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53 Current library service platforms, such as Alma, offer data warehousing and analyzing  
54  
55 capabilities. Librarians are enabled or called upon to act as data analysts when given a  
56  
57 question to answer about their library’s items and services. According to the Berkeley  
58  
59 School of Information (2021), “Data analysts bridge the gap between data scientists and  
60

1  
2  
3 business analysts. They are provided with the questions that need answering from an  
4 organization and then organize and analyze data to find results that align with high-level  
5 business strategy. Data analysts are responsible for translating technical analysis to  
6 qualitative action items and effectively communicating their findings to diverse  
7 stakeholders.” This article addresses the practicalities of finding and organizing library  
8 information accurately to answer questions in the context of automatic usage harvesting  
9 with Alma and Alma Analytics; alignment with strategy and translation to action items  
10 are outside the scope of this article.  
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21 Boardman and Thompson (2022) advise taking into consideration the learning  
22 curve required for using Alma Analytics, even when one has a background in analytics.  
23 We [the authors] agree that there is a steep learning curve for this complicated system.  
24 In addition to initial learning, designating time to focus on working in Alma Analytics  
25 without distraction is necessary to create good quality reports that accurately answer the  
26 question asked. Due to the complex nature of library catalogs, it is easy to measure  
27 something other than what one intended to measure.  
28  
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38 Entity relationships between Alma and Alma Analytics can be difficult to  
39 discern. Some field names are duplicated yet have different possible data types;  
40 alternately, the same data field may have a slightly different name. For example,  
41 “access type” appears in more than one place. In Alma’s Electronic Portfolio Editor  
42 Access Type may be populated with *Current*, *Perpetual*, or *Current and perpetual*. In  
43 the Alma Analytics Usage Data subject area, Access Type may be populated with one  
44 or all of *NULL*, *CONTROLLED*, *Controlled*, *OA\_GOLD*, *OTHER\_FREE\_TO\_READ* in  
45 our instance.  
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55 Once a report has been created, it is relatively simple to run it again; however,  
56 the initial design can take significant time, attention, and revision. A good quality  
57  
58  
59  
60

1  
2  
3 control measure is to discuss the analysis/report with a colleague who has previous  
4  
5 experience producing reports for your library or consortium.  
6

7  
8 It may also be necessary to consult your library's cataloger or metadata  
9  
10 specialist if you have difficulty determining how to isolate particular items solely based  
11  
12 on the choices in Analytics. One useful process is to run an analysis with several fields  
13  
14 to see how they intersect. For example, some commonly used fields in ACRL reports  
15  
16 are Material Type (Bibliographic), Resource Type (Bibliographic), Material Type  
17  
18 (Item), and Item Policy (Item). When you create an analysis with all of them, the  
19  
20 resulting table can help you decide how to filter results in order to meet the ACRL  
21  
22 Survey definitions. For a methodology and examples, see *ACRL/IPEDS Title, Volume,*  
23  
24 *and Circulation Counts in Alma Analytics* (Nauenburg & Day, 2022).  
25  
26  
27

28  
29 A good practice is to regularly review the Alma release notes for updates,  
30  
31 because Ex Libris is constantly making improvements. Updates could include important  
32  
33 aspects such as the harvest schedule, new fields in various subject areas, and fixes for  
34  
35 unexpected behavior. For example, in August 2023, a new layout was made the default  
36  
37 and a link to a webinar about its capabilities and functionality was provided, and in  
38  
39 October, one resolved issue was that "Usage data from several SUSHI files did not  
40  
41 appear in Analytics. This was fixed" (Ex Libris, 2023a).  
42  
43

44  
45 Remember that data is imported into Alma Analytics from Alma overnight on a  
46  
47 daily basis. Data is usually available by the next business day, with the exception of  
48  
49 Tiles and Benchmark subject areas that are updated monthly, the Analytics Usage  
50  
51 Tracking subject area that is updated weekly, and the Cost Usage section of the E-  
52  
53 Inventory subject area that is updated monthly. (Ex Libris, n.d.a)  
54

55  
56 The behavior of Alma and Alma Analytics changes according to how frequently  
57  
58 a particular query is run and whether it has existed before. In my [MD] experience,  
59  
60

1  
2  
3 when an entirely new query is created, the initial results may be nonsensical. A day or  
4  
5 two. . . or a week later, the report may work as expected. In 2018, Smith reported that,  
6  
7 “I have found in the past that occasionally reports created by others don’t always work  
8  
9 in my environment but when I recreate it, it will” (Goldfarb, 2018). This state of affairs  
10  
11 is another reason to allow yourself ample time to investigate options, consult experts,  
12  
13 and check and re-check your work.  
14  
15

16  
17 Although improvements have been made to the timeout interval, be sure to  
18  
19 refresh your Alma tab while working in Analytics. Report and search results should be  
20  
21 reproducible. If at any time you receive obviously strange results, close your browser or  
22  
23 open a private/incognito window and log back in again.  
24  
25

## 26 27 **Report Examples**

28  
29 Every year, academic libraries submit statistics to ACRL and IPEDS. Having the usage  
30  
31 data already loaded in the library services platform via SUSHI greatly simplifies two of  
32  
33 these reports. Final accuracy of the totals depends on multiple factors, including the fact  
34  
35 that not all publishers offer SUSHI as an option.  
36  
37

### 38 39 *ACRL 60 Column B*

40  
41 ACRL 60 Column B asks libraries to “report usage of digital/electronic titles whether  
42  
43 viewed, downloaded, or streamed.” The definition specifies that “Relevant COUNTER  
44  
45 Release 5 reports for e-books are: TR\_B1: Book Requests (Excluding OA\_Gold). As to  
46  
47 the COUNTER 5 metric type for e-books, report ‘unique title requests.’ For e-media,  
48  
49 use IR\_M1: Multimedia Item Requests, report metric type for ‘total\_item\_requests’ is  
50  
51 the most relevant.” (2022 Survey Instructions  
52  
53

54  
55 [https://acrl.libguides.com/ld.php?content\\_id=70233803](https://acrl.libguides.com/ld.php?content_id=70233803)  
56  
57  
58  
59  
60

To construct a report for 60B in Alma Analytics, create a new analysis and choose the Usage Data (COUNTER) subject area. When adding fields, I (MD) started with Vendor Name and Platform (vendor interface), although one would suffice. Then I added the key fields TR\_B1 - Unique Title Requests and IR\_M1 - Total Item Requests. I filter the results by Material Type Indicator (TR\_B1, IR\_M1) and Usage Date Fiscal Year (Figure 11). While other fields could be added for exploratory purposes when initially creating the report, it is possible to complicate matters by using too many fields, because one field may limit another and change the final results. In Figure 12, Access Type was used in the previous year and provides further information that vendors mark items as “controlled,” meaning behind a paywall, but do not mark access them as “open access.”

Note that the fiscal year has to be defined ahead of time; if it displays unexpected behavior, consult with the person who manages your instance of Alma or its acquisitions area. Alternately, you could filter by the specific months comprising the previous fiscal year at your institution.

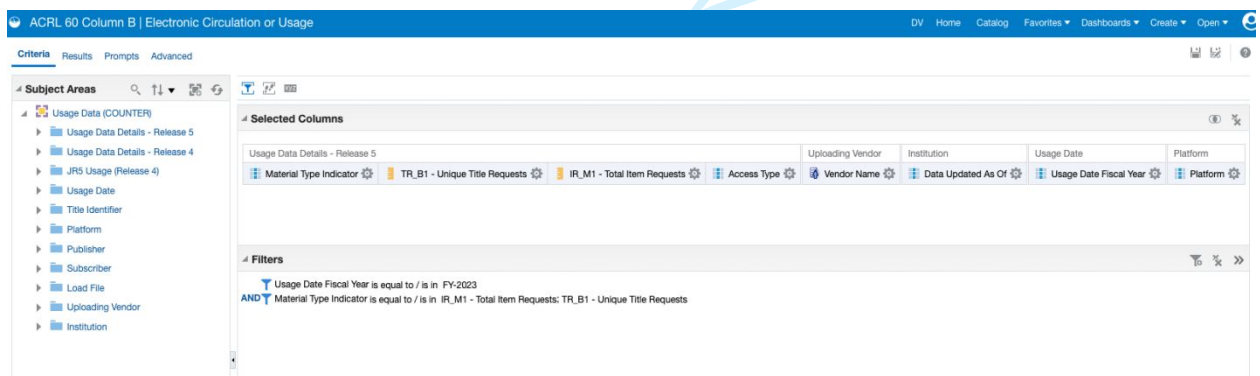


Figure 11. Criteria tab for an ACRL 60 Column B report in Alma Analytics

The screenshot displays the 'Results' tab for an ACRL 60 Column B report. The main content area is titled 'Compound Layout' and contains three sections:

- Title:** ACRL 60 Column B | Electronic Circulation or Usage
- Narrative:** Data updated as of 9/11/2023 8:05:00 PM, FY-2023
- Table:** A table with the following columns: Vendor Name, Platform, TR\_B1 - Unique Title Requests, IR\_M1 - Total Item Requests, and Access Type.

Vendor Name	Platform	TR_B1 - Unique Title Requests	IR_M1 - Total Item Requests	Access Type
ACM (Association for Computing Machinery)	acm	11	0	CONTROLLED
Accessible Archives	Accessible Archives	8	0	CONTROLLED
Alexander Street Press	search.alexanderstreet.com	0	7,240	
	video.alexanderstreet.com	0	988	
American Chemical Society	ACS	150	0	CONTROLLED
American Psychological Association	APA PsycNET	23	0	CONTROLLED
American Society Of Civil Engineers	American Society of Civil Engineers	45	0	CONTROLLED
Bloomsbury	DramaOnline	0	29	
Cambridge University Press	Cambridge Core	193	0	CONTROLLED
Credo	Credo Search	550	0	CONTROLLED
Digital Theatre	Digital Theatre+	0	2,990	
EBSCO Subscription Service	EBSCOhost	59,391	0	CONTROLLED
Emerald	Emerald	4	0	CONTROLLED
	Emerald Insight	10	0	CONTROLLED
Gale Group	Gale	2,791	0	CONTROLLED
IGI Global	IGI Global e-Resources Platform	5	0	CONTROLLED
IOP Publishing	IOPscience	3	0	CONTROLLED

Below the table is a 'Selection Steps' section.

Figure 12. Results tab for an ACRL 60 Column B Electronic Circulation or Usage report

As mentioned above, the table columns can be moved in the results view to obtain the desired order. I also added a Narrative section, which is added in the results view from Views > Other Views > Narrative (Figure 13). There I included the fiscal year and the Data Updates As Of field to show when the data was automatically copied from Alma to Alma Analytics (Figure 14). The information is updated automatically in the Narrative from the criteria by referencing the placement of the field, counted from left to right, after an @ [at sign]. A preview of the text shows up below the input boxes. After saving, drag the narrative from the Views pane on the left-hand side and drop it above or below the table while in the results view.

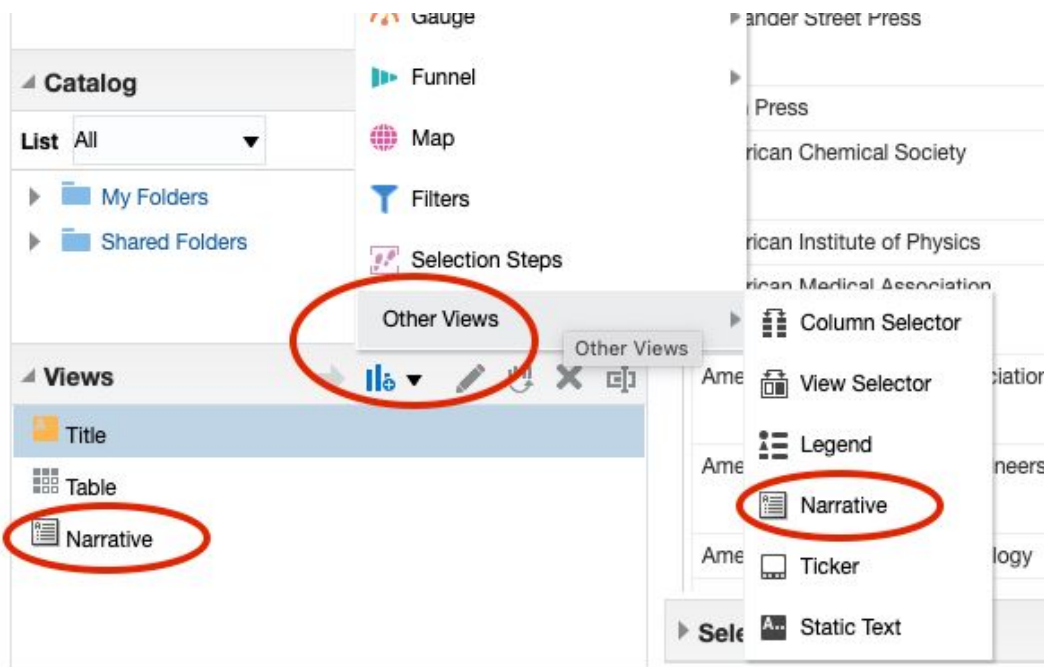


Figure 13. Creating/Finding the narrative view on the results screen

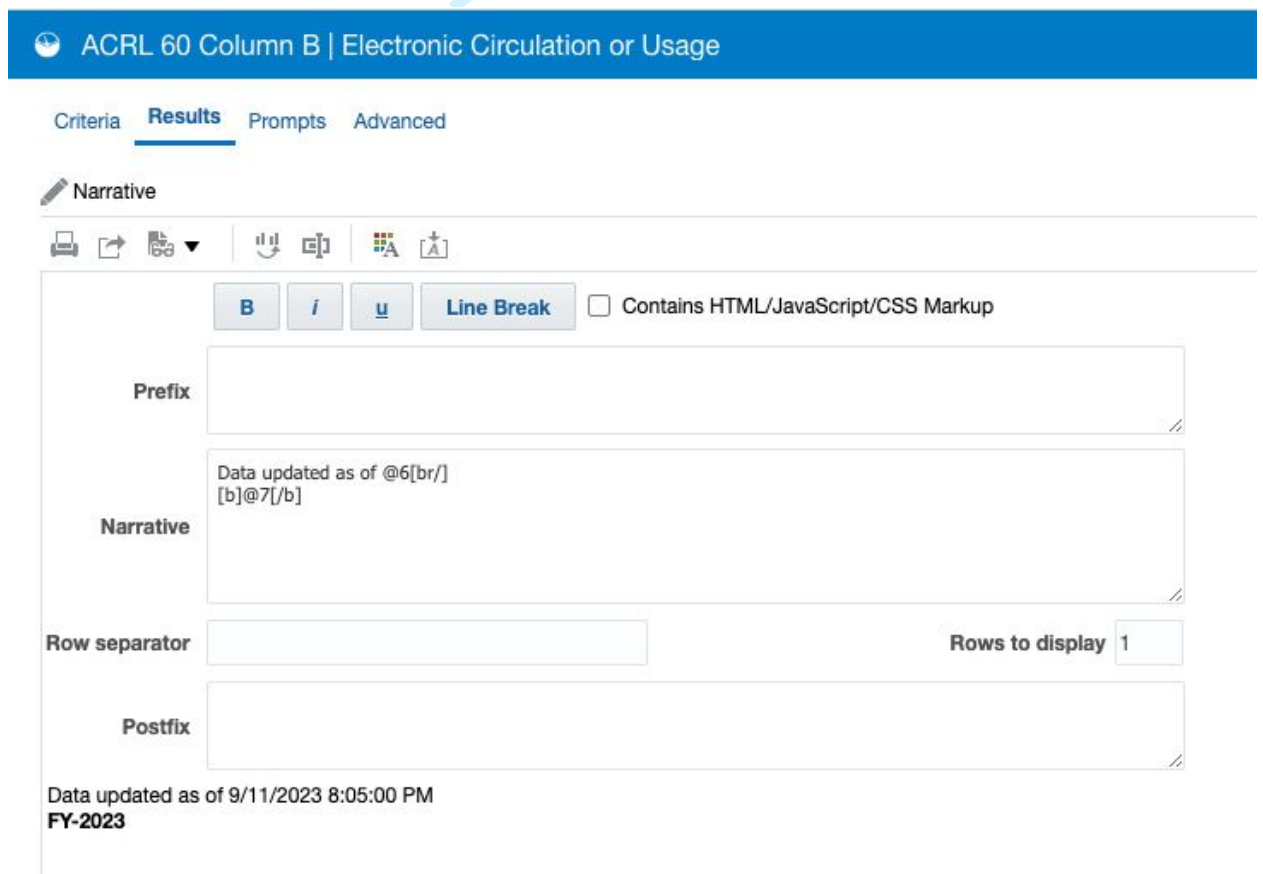


Figure 14. Constructing a narrative view with date and fiscal year displayed



1  
2  
3 I [MD] add the column totals for the final number that I report to our libraries'  
4  
5 assessment librarian. In this case, only the total is needed and it does not need to be  
6  
7 broken down by subcategories. I set the aggregation rule to SUM.  
8  
9

### 10 11 *ACRL 63*

12  
13  
14 The process is similar for creating a report for ACRL 63, electronic serial usage.

15  
16  
17  
18 The 2022 Survey Instructions (2022 Survey Instructions  
19  
20 <https://acrl.libguides.com/stats/surveyhelp> or  
21  
22 [https://acrl.libguides.com/ld.php?content\\_id=70233803](https://acrl.libguides.com/ld.php?content_id=70233803)) for ACRL 63 E-Serials Usage  
23  
24 specify:  
25  
26

27  
28 Report usage of e-serial titles whether viewed, downloaded, or streamed. Include  
29  
30 usage for e-serial titles only, even if the title was purchased as part of a database.  
31  
32 Viewing a document is defined as having the full text of a digital document or  
33  
34 electronic resource downloaded. [NISO Z39.7-2013, section 7.7] If available,  
35  
36 include the count for open access e-journal usage if the title is accessible through  
37  
38 the library's catalog or discovery system. . . .

38  
39 Most vendors will provide usage statistics in COUNTER Release 5 reports. Start  
40  
41 with TR\_J1 (COUNTER 5) and add OA if discoverable/available. Also, please add  
42  
43 a note if the OA counts were manually added. For the metric type, report "unique  
44  
45 item requests."

46  
47 The options for TR\_J1 in Alma Analytics are TR\_J1 - Total Item Requests, The  
48  
49 total number of item requests or "TR\_J1 - Unique Item Requests, The number of unique  
50  
51 item requests."

52  
53 ([https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/Alma_Analytics_Subject_Areas/Usage_Data)  
54  
55 [Help\\_\(English\)/080Analytics/Alma\\_Analytics\\_Subject\\_Areas/Usage\\_Data](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/Alma_Analytics_Subject_Areas/Usage_Data)) The option  
56  
57 to include or exclude open access articles is through the Access Type field. Whereas the  
58  
59 2021 definition excluded Open Access Gold, the 2022 definition includes open access  
60

1  
2  
3 journals if they are discoverable through the library's catalog. As of this writing,  
4  
5 running the report shown below without an Access Type filter returns a slightly larger  
6  
7 number than running it with the Access Type limited to *contains any* or *is equal to / is*  
8  
9 *in* NULL; CONTROLLED; Controlled; OA\_GOLD; OTHER\_FREE\_TO\_READ (i.e.,  
10  
11 all the options) in our instance of Alma Analytics (by 435 out of 535,347—or less than  
12  
13 1%—for fiscal year 2021). This discrepancy highlights the difficulty of pulling an  
14  
15 accurate result in Analytics. Because there are so many parameters, an operation can be  
16  
17 affected by parameters that are not at first apparent. When I first started working with  
18  
19 Analytics reports, I would have thought that the report would pull the same number  
20  
21 when all access types were chosen as when no access types were chosen; however, that  
22  
23 is not the case. This example shows why I have adjusted my thinking to dealing with  
24  
25 fuzzy rather than crisp subsets of items in the catalog.  
26  
27  
28  
29

30  
31 The few items reported by our vendors that are not controlled access have no  
32  
33 access type assigned to them in Alma Analytics. Open access websites do not report  
34  
35 COUNTER usage to libraries; in addition, because no authentication is required to  
36  
37 access those websites, there are minimal statistics regarding their use in the current  
38  
39 library ecosystem. In arguing for the benefits of a freemium model, Green (2017) states,  
40  
41 “One of the problems inherent with most open access models is that no-one can identify  
42  
43 who has accessed the work and to what depth. This is because there is no requirement  
44  
45 for user identification or registration for open access works – the work is free to access  
46  
47 by anyone with an internet connection and there is no prior requirement to register or  
48  
49 sign on for access rights. Whilst web analytics tools like Google Analytics can provide  
50  
51 high-level reports on usage, including some basic geo-level data such as accesses by  
52  
53 city or region, an open access publisher has no ability to report detailed usage by  
54  
55 institution name. . . .”  
56  
57  
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Criteria for 63 come from the Usage Data (COUNTER) subject area and the folders Usage Data Details – Release 5, Uploading Vendor, Institution, and Usage Data. Filters are Usage Date Fiscal Year and Material Type Indicator (Figure 15).

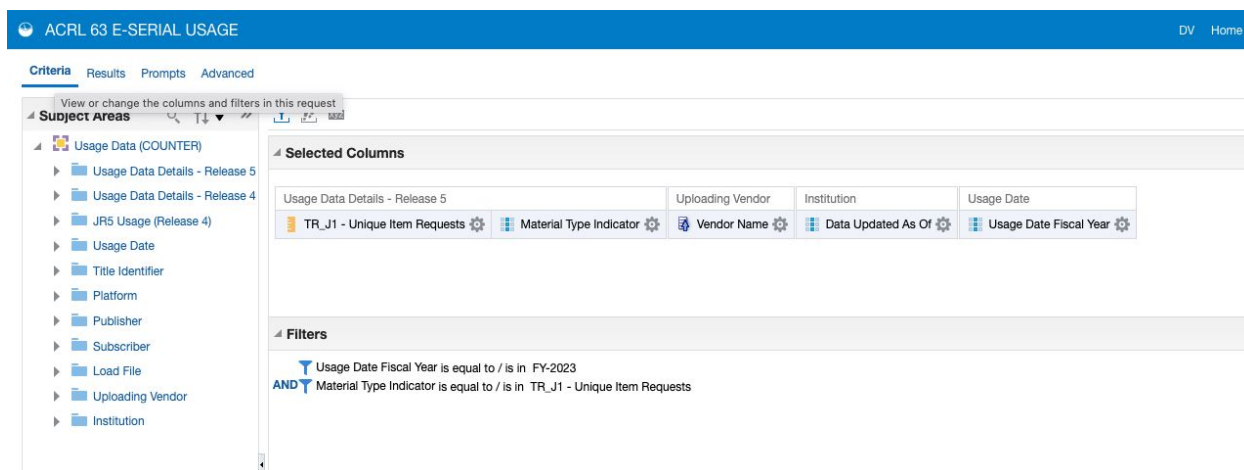


Figure 15. Suggested criteria for ACRL 63 using Alma Analytics

The results table includes Title (which can be customized or left as the report/analysis name), Narrative, and Table Views (Figure 16).

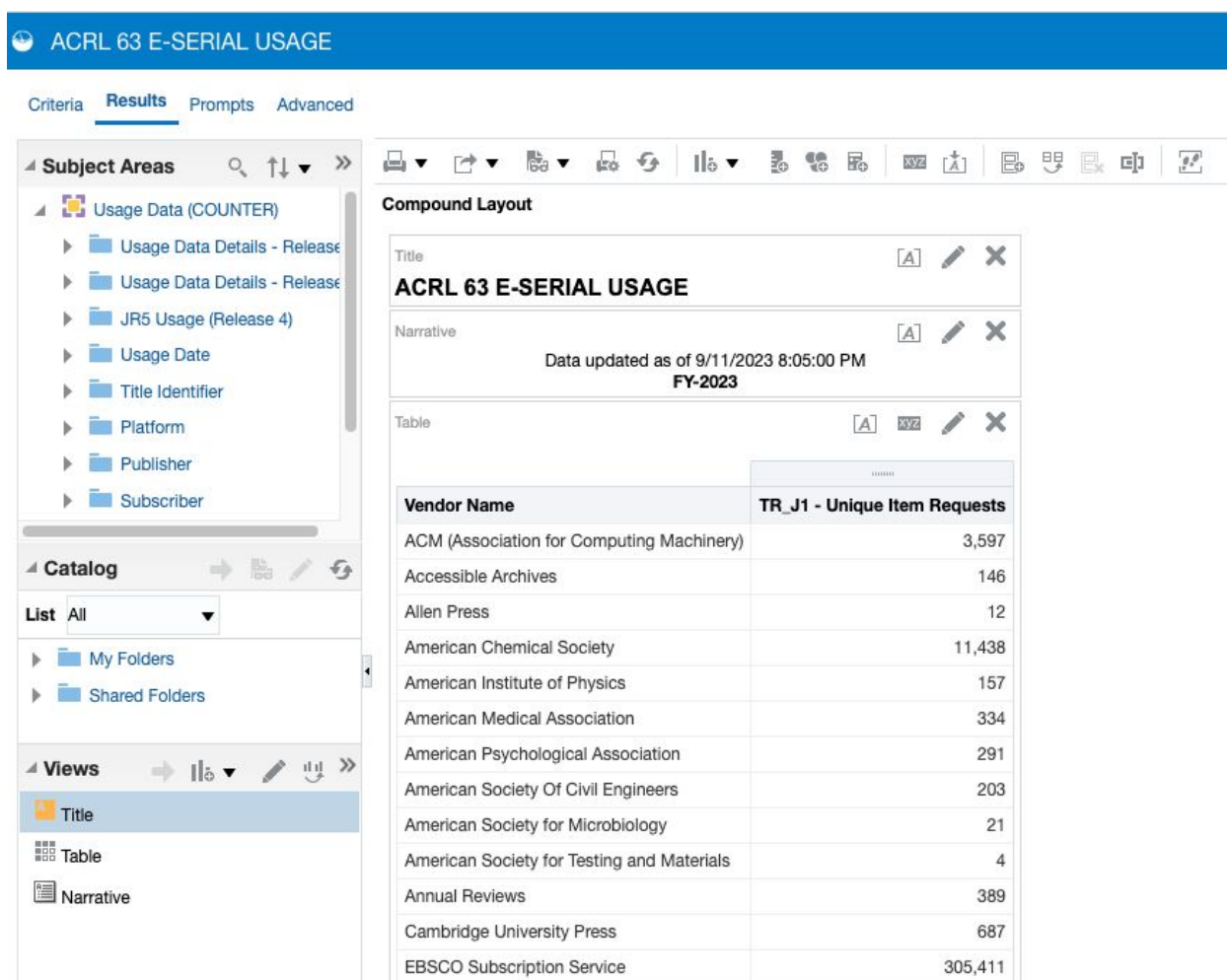


Figure 16. Results tab for ACRL 63 E-Serial Usage

### *Out-of-the-Box Dashboard for ACRL/IPEDS*

In the June 2023 Release, Ex Libris released a dashboard to assist in pulling data needed for submission to ACRL and IPEDS. It is located at Alma > Shared Folders > Industry Standard Reports. To use the dashboard effectively, you may wish to copy it to your institution zone or network zone. The Archive/Unarchive function is ideal for this purpose (Jääskeläinen, 2023). Once copied over, a designer can hard code specifics for the institution on the criteria screen or prompts of each analysis and add instructions to the dashboard. Because it is based in large part on the work of Nauenburg & Day (S. de la Fuente, personal communication, January 3, 2023), the same report preparation methodology applies (Nauenburg & Day, 2022). By starting with material type and then

1  
2  
3 limiting to resource type and excluding locations, the complex definitions can be met  
4  
5 for a particular institution's library collection.  
6  
7

## 8 9 **Conclusion**

10  
11 The way librarians access, manage, and display usage reports changes with the  
12 evolution of standards and software. The SUSHI protocol to automatically harvest  
13 COUNTER usage reports from publishers is a labor-saving feature of Alma, a SaaS  
14 library services platform that is used worldwide. While putting the process in place is  
15 relatively straightforward, there is a need for ongoing upkeep and maintenance  
16 afterwards. In this article we have shared our experience maintaining SUSHI vendor  
17 accounts. We have drawn attention to common sources of difficulty, vendor  
18 documentation, and online resources for becoming aware of widespread problems. We  
19 also provided examples of using the harvested usage data in analyses for national  
20 reporting requirements.  
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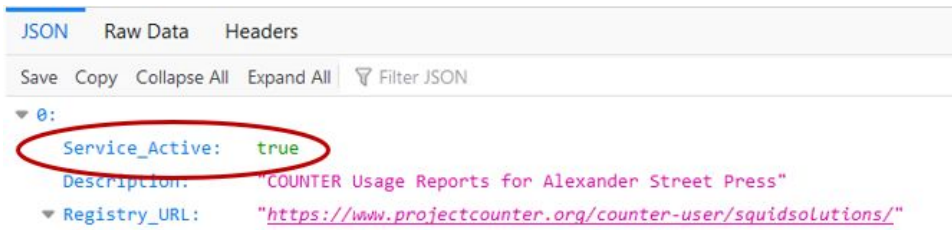


Figure 1. Connection Status “true”

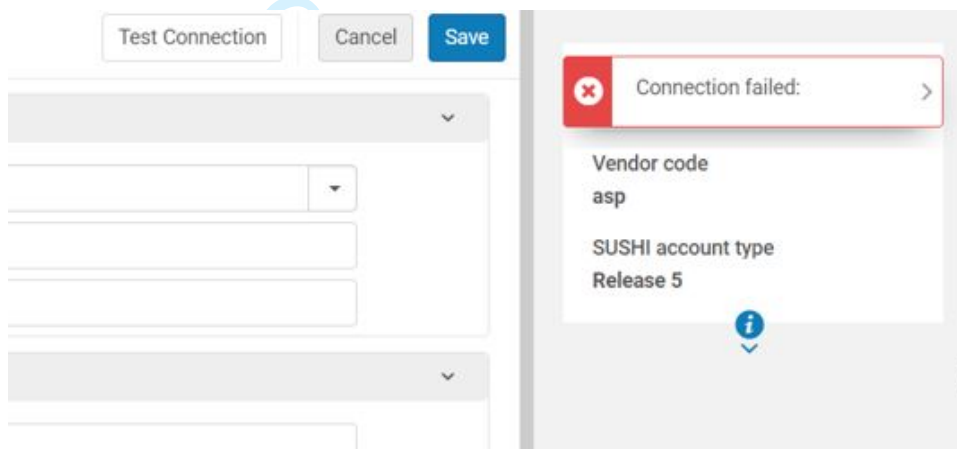


Figure 2. Connection failed

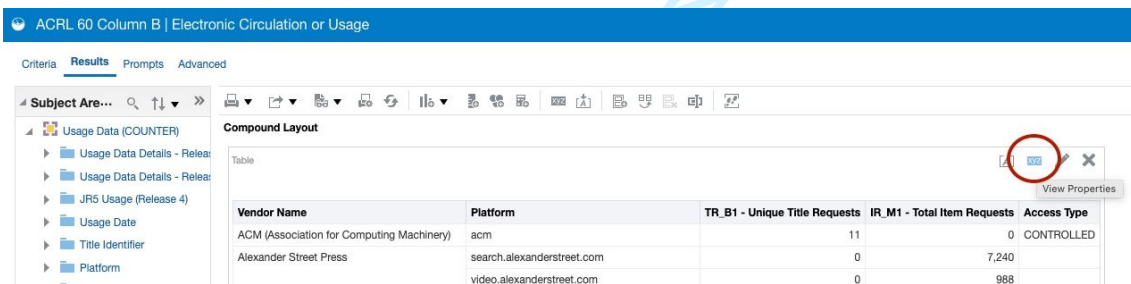


Figure 3. View Table Properties

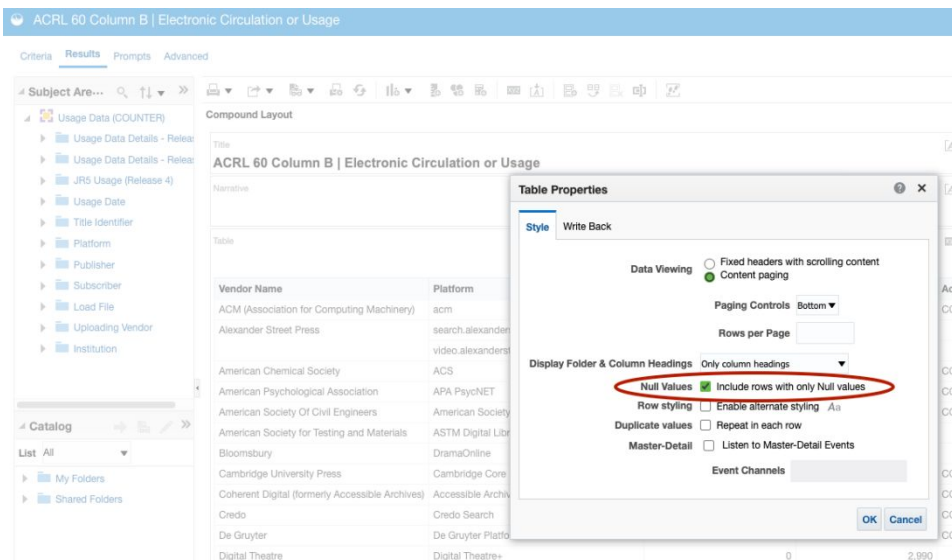


Figure 4. Null Values under Table Properties

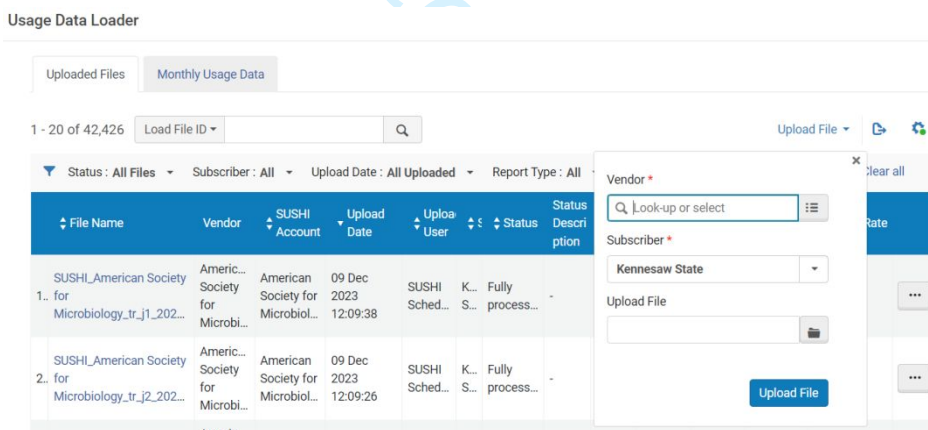


Figure 5. Manually uploading usage data

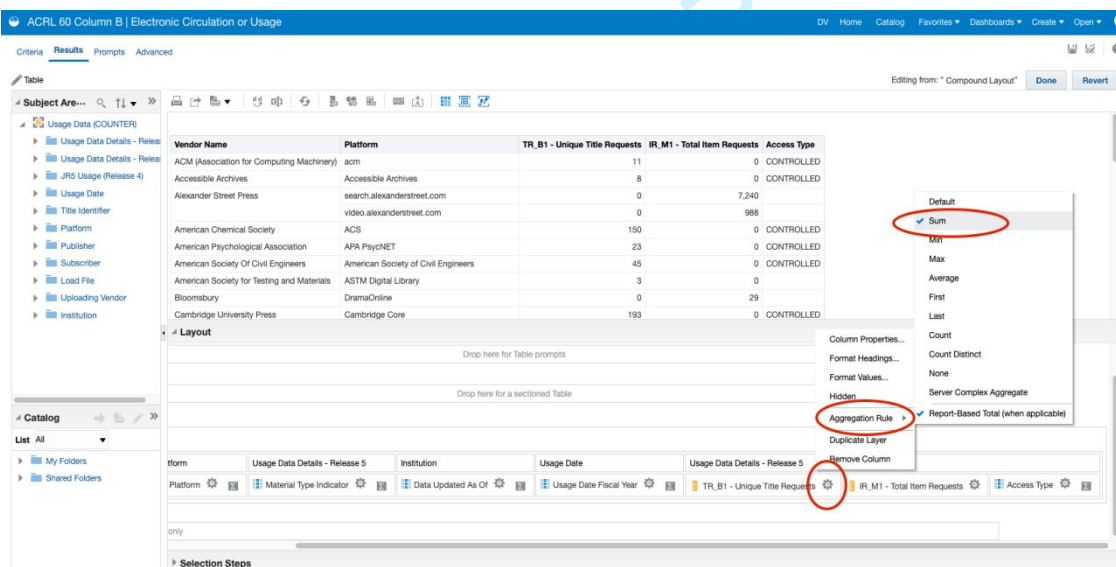


Figure 6. Choosing the aggregation rule from the results pane

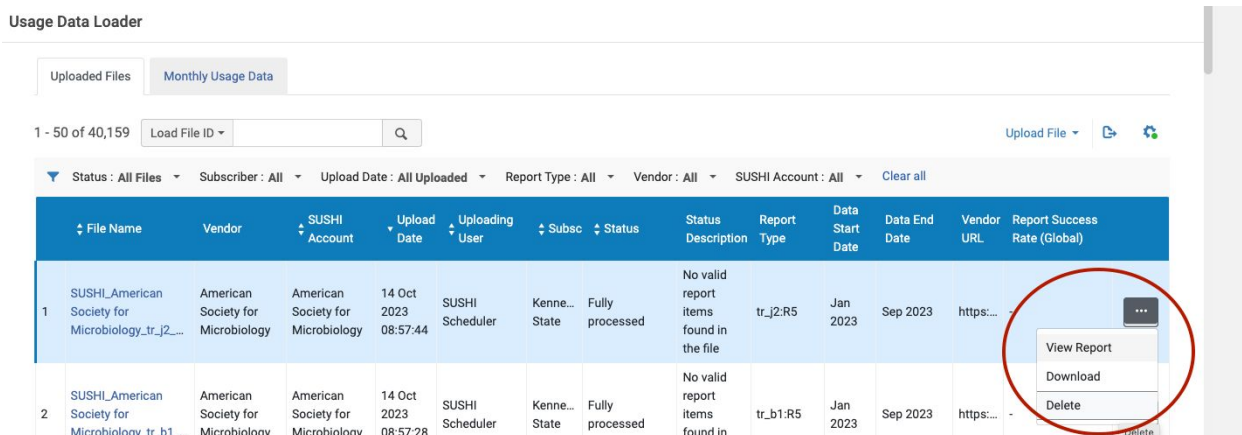


Figure 7. Usage Data Loader

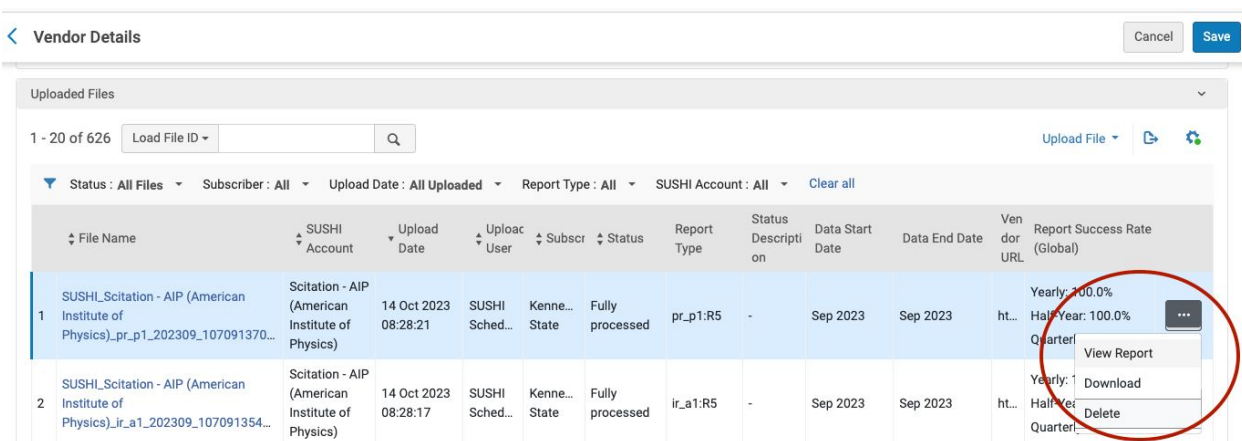


Figure 8. Vendor Details

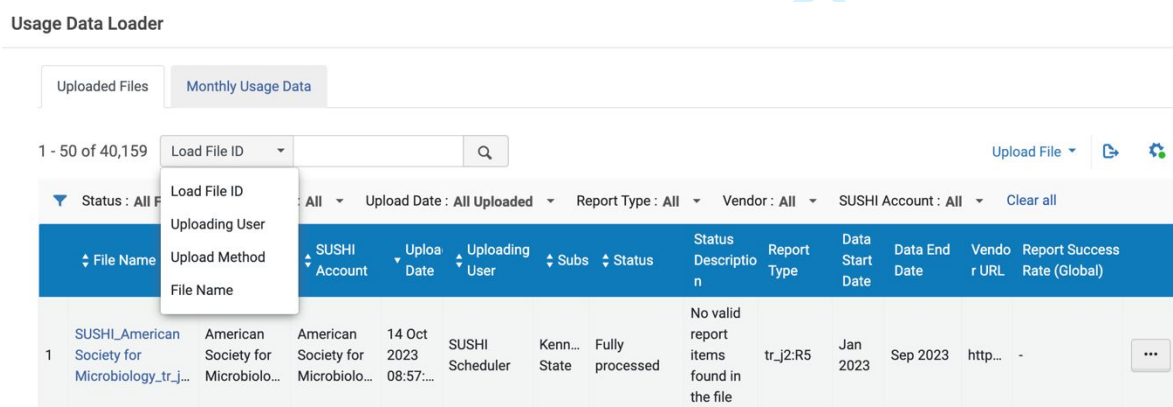


Figure 9. Usage Data Loader search options in Alma

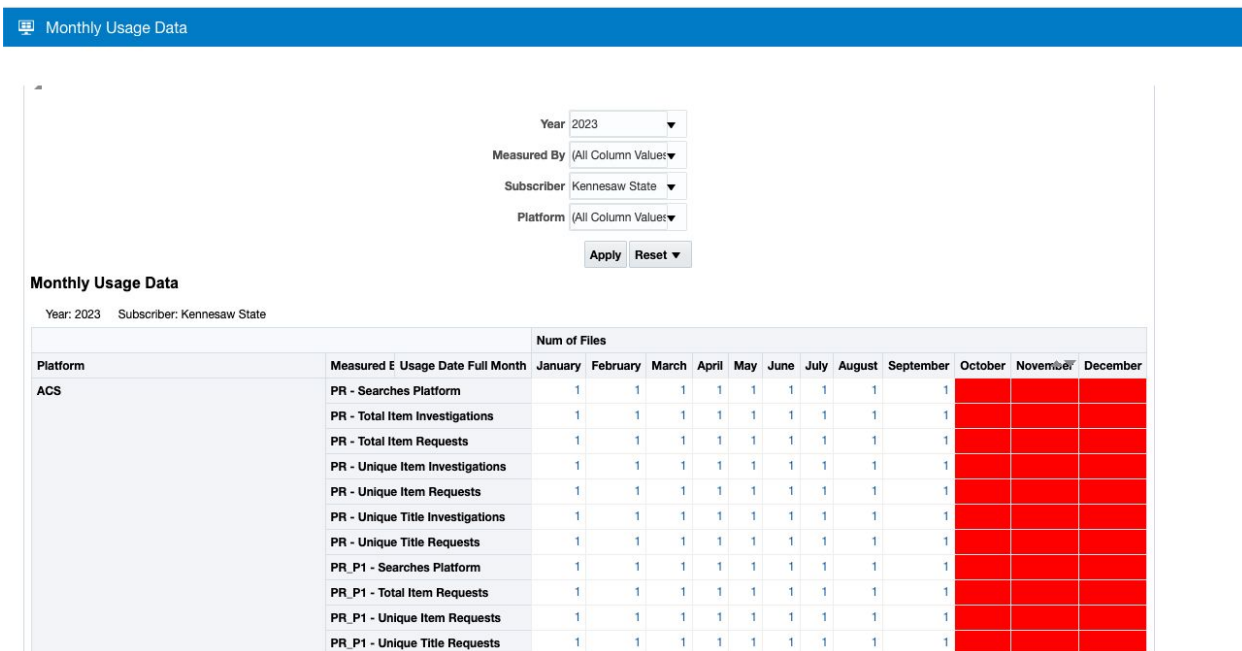


Figure 10. Monthly Usage Data dashboard

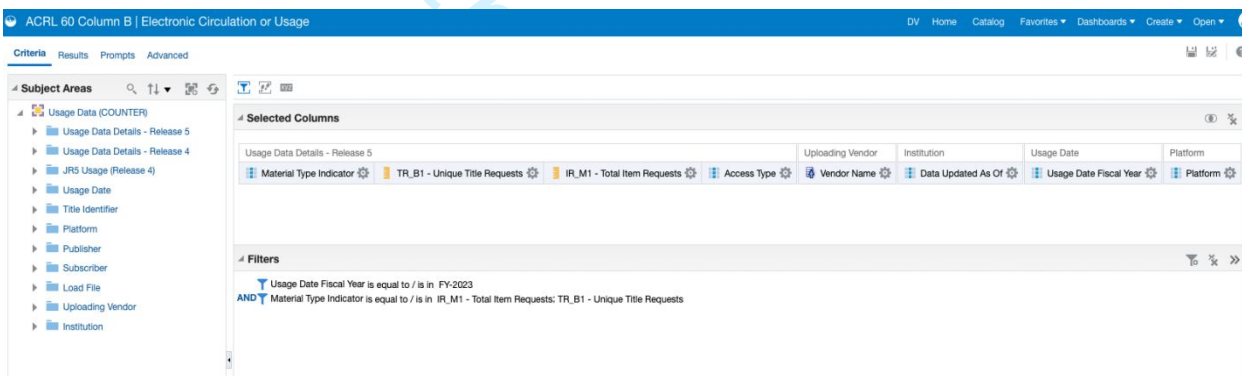


Figure 11. Criteria tab for an ACRL 60 Column B report in Alma Analytics

ACRL 60 Column B | Electronic Circulation or Usage

Criteria Results Prompts Advanced

Subject Area...

Usage Data (COUNTER)

Usage Data Details - Release

Usage Data Details - Release

JRS Usage (Release 4)

Usage Date

Title Identifier

Platform

Publisher

Subscriber

Load File

Uploading Vendor

Institution

Catalog

List All

My Folders

Shared Folders

Views

Title

Table

Narrative

Compound Layout

Title

ACRL 60 Column B | Electronic Circulation or Usage

Narrative

Data updated as of 9/11/2023 8:05:00 PM  
FY-2023

Vendor Name	Platform	TR_B1 - Unique Title Requests	IR_M1 - Total Item Requests	Access Type
ACM (Association for Computing Machinery)	acm	11	0	CONTROLLED
Accessible Archives	Accessible Archives	8	0	CONTROLLED
Alexander Street Press	search.alexanderstreet.com	0	7,240	
	video.alexanderstreet.com	0	988	
American Chemical Society	ACS	150	0	CONTROLLED
American Psychological Association	APA PsycNET	23	0	CONTROLLED
American Society Of Civil Engineers	American Society of Civil Engineers	45	0	CONTROLLED
Bloomsbury	DramaOnline	0	29	
Cambridge University Press	Cambridge Core	193	0	CONTROLLED
Credo	Credo Search	550	0	CONTROLLED
Digital Theatre	Digital Theatre+	0	2,990	
EBSCO Subscription Service	EBSCOhost	59,391	0	CONTROLLED
Emerald	Emerald	4	0	CONTROLLED
	Emerald Insight	10	0	CONTROLLED
Gale Group	Gale	2,791	0	CONTROLLED
IGI Global	IGI Global e-Resources Platform	5	0	CONTROLLED
IOP Publishing	IOPscience	3	0	CONTROLLED

Selection Steps

Figure 12. Results tab for an ACRL 60 Column B Electronic Circulation or Usage report

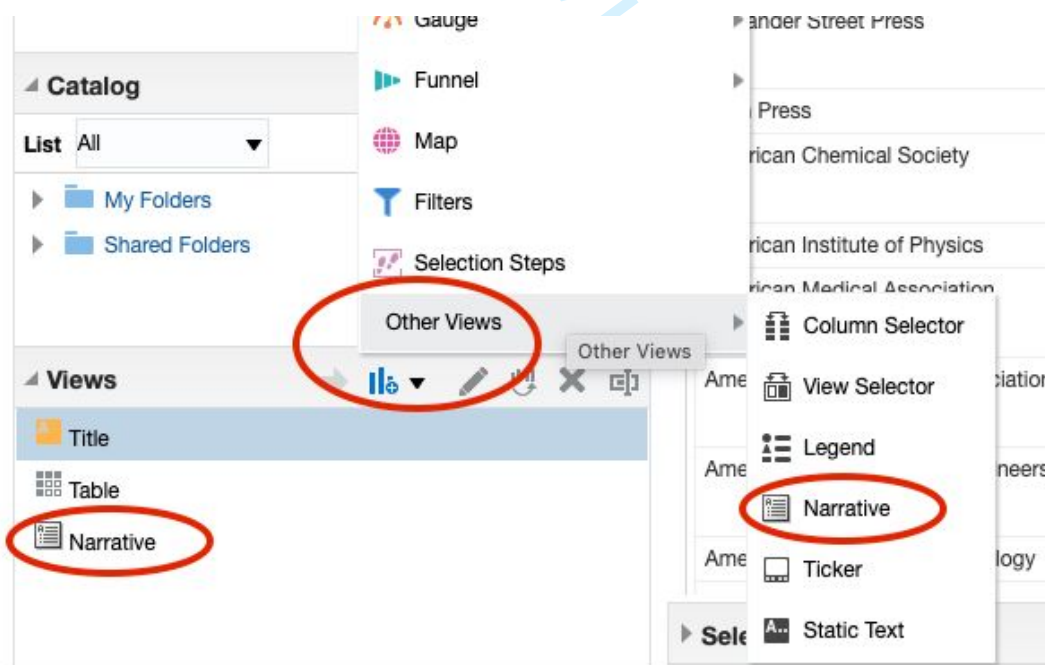


Figure 13. Creating/Finding the narrative view on the results screen

ACRL 60 Column B | Electronic Circulation or Usage

Criteria **Results** Prompts Advanced

**Narrative**

Contains HTML/JavaScript/CSS Markup

**B** *i* u **Line Break**

**Prefix**

**Narrative**  
 Data updated as of @6[br/]  
 [b]@7[/b]

**Row separator**

**Rows to display** 1

**Postfix**

Data updated as of 9/11/2023 8:05:00 PM  
**FY-2023**

Figure 14. Constructing a narrative view with date and fiscal year displayed

ACRL 63 E-SERIAL USAGE

Criteria Results Prompts Advanced

View or change the columns and filters in this request

**Subject Areas**

- Usage Data (COUNTER)
  - Usage Data Details - Release 5
  - Usage Data Details - Release 4
  - JR5 Usage (Release 4)
  - Usage Date
  - Title Identifier
  - Platform
  - Publisher
  - Subscriber
  - Load File
  - Uploading Vendor
  - Institution

**Selected Columns**

Usage Data Details - Release 5	Uploading Vendor	Institution	Usage Date
TR_J1 - Unique Item Requests	Material Type Indicator	Vendor Name	Data Updated As Of
			Usage Date Fiscal Year

**Filters**

Usage Date Fiscal Year is equal to / is in FY-2023

AND Material Type Indicator is equal to / is in TR\_J1 - Unique Item Requests

Figure 15. Suggested criteria for ACRL 63 using Alma Analytics

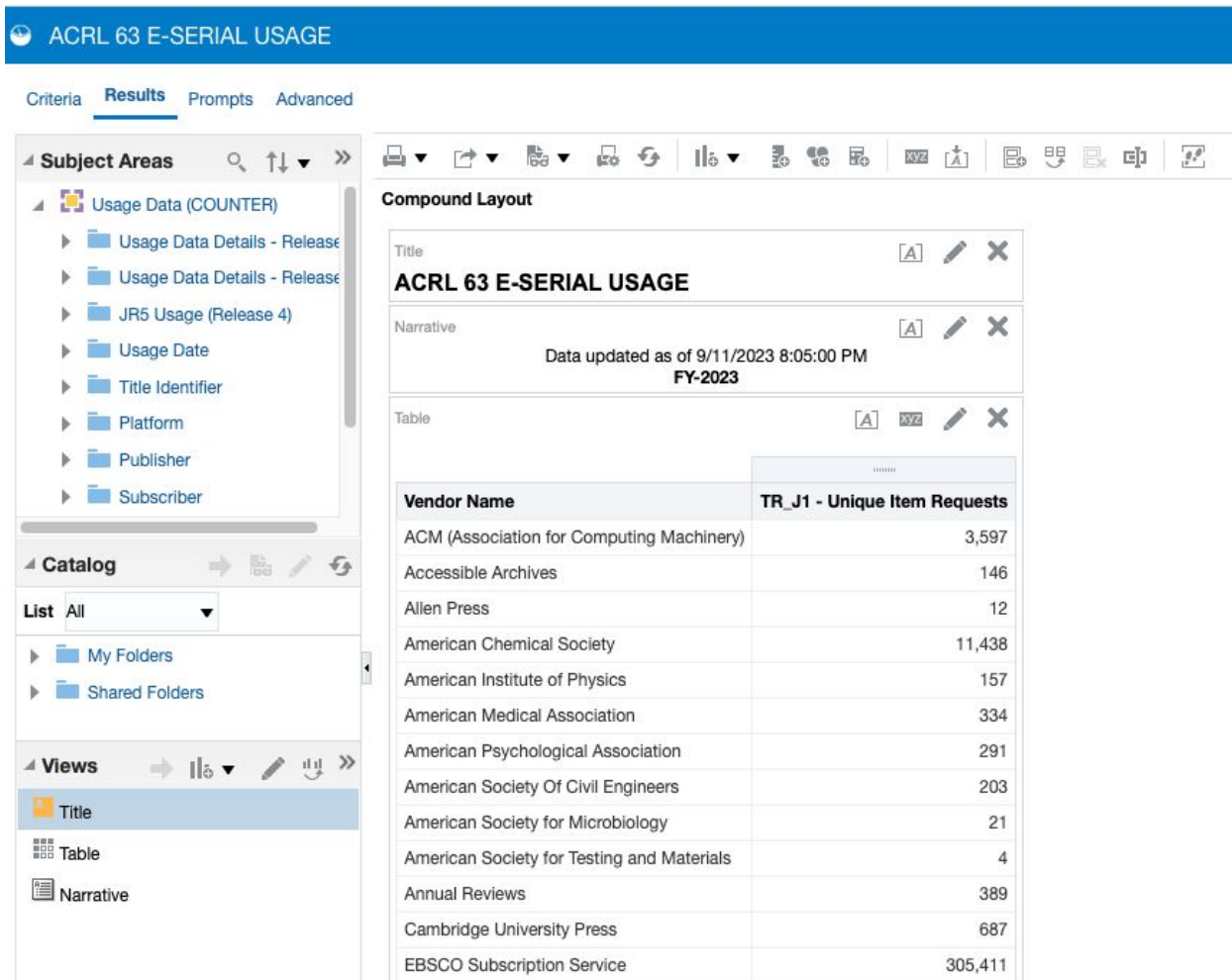


Figure 16. Results tab for ACRL 63 E-Serial Usage