

Manually Loading Usage Data in Alma

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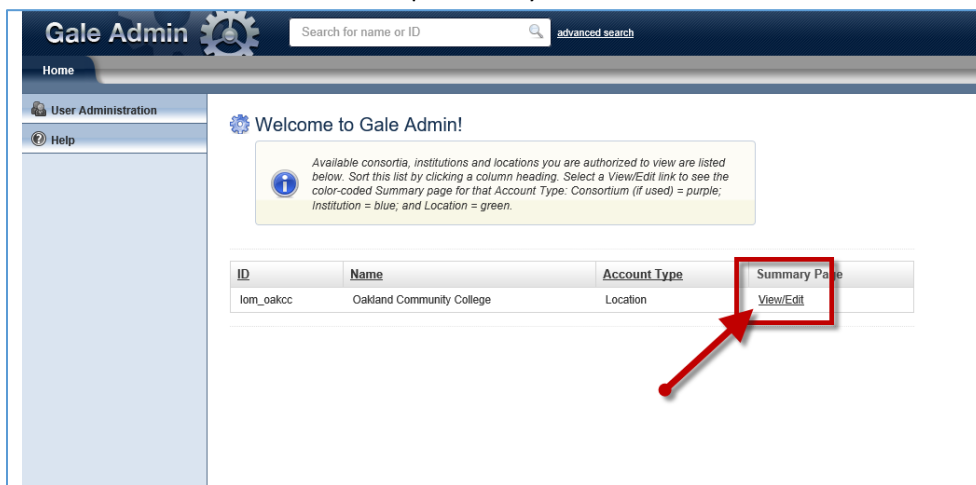
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Manually Loading COUNTER-Compliant Data from Gale

Login to Gale Admin at <http://admin.galegroup.com/galeadmin/login.gale>



Click the **View/Edit** link to see the options for your institution.



On the left side menu, click **Reports** then select **View Usage Reports**

The screenshot shows the Gale Admin interface. On the left is a green sidebar menu with the following items: Location Details, Location Authentication, Preferences, Discovery Services, Custom Databases, eBooks, Reports, View Usage Reports, Career Transitions Reports, Tips to Increase Usage, and Help. A red box highlights the 'Reports' menu, and a red arrow points to 'View Usage Reports'. The main content area is titled 'Location: Oakland Community College – Location Summary'. It contains a text box with an information icon and the following text: 'View general info about a location. Users with "Admin" privilege can edit this page. The green sidebar menu provides more settings for this location, including product preferences. Return to this Summary by clicking the green tab above. Return to the Institution Summary by clicking the blue tab (where you can link to a different location). If a consortium exists, click the purple tab to return to its Summary page.' Below this is a form with the following fields: Location Name: * (Oakland Community College), Location Id: lom_oakcc, Location Type: Not demo, and Account Status: Active Location.

Click the name of the report you want to run. Common COUNTER-compliant reports available here are:

- **Journal Report 1**
(usage by journal title)
- **Database Report 1**
(usage by database)
- **Database Report 2**
(database access denied)
- **Book Report 2**
(ebook usage by section)

There are many options on this page, but from our experience it might be best to run reports on demand rather than trying to schedule ongoing future delivery.

**** Please note that Journal Report 1 (JR1) reports are not loading into Alma. This is a known problem that is expected to be fixed with the December 2017 release.**

The screenshot shows the IBM Cognos Connection interface. The top bar is blue with 'IBM Cognos Connection' on the left and 'Oakland' on the right. Below the bar is a navigation area with 'Gale Customer Reports' and 'My Folders'. The main content area is titled 'Gale Customer Reports' and contains the text 'Click on any of the reports below to view your usage.' Below this is a 'Cognos Navigator' section with a table of reports. The table has two columns: 'Name' and 'Actions'. The 'Name' column lists various reports, including 'COUNTER - Book Report 2', which is highlighted with a red box and a red arrow. The 'Actions' column contains icons for 'More...' and other actions. Below the table is another 'Cognos Navigator' section titled 'Location Detail Reporting' with a similar table of reports. At the bottom of the page is a 'Notice' section.

Once you choose a report (1) select a date range, then (2) select all or some of the databases to include in the report, then (3) click the Finish button on the bottom of the screen. It will take a while for the report to run.

The screenshot shows a web-based report generation interface. At the top, it says "Data available from January 1, 2015 through August 27, 2017". Below this is a "Date Selection" section with "From:" and "To:" fields, each containing "Year:" and "Month:" dropdown menus. A red box highlights the date selection area, with a red arrow labeled "1" pointing to it. Below the date selection is a list of databases, including "Academic OneFile", "Agriculture Collection", "Biography In Context", "Biography and Genealogy Master Index", "Books & Authors", "Business Collection", "Business Economics and Theory", "Business Insights: Essentials", "Business Insights: Global", "Business and Company ASAP", and "Business and Company Resource Center". A red box highlights the "Select all" button at the bottom right of the database list, with a red arrow labeled "2" pointing to it. Below the database list is a "Location Selection:" dropdown menu with "Oakland Community College (Location ID: lom_oakcc)" selected. At the bottom left, there are "Cancel" and "Finish" buttons. A red box highlights the "Finish" button, with a red arrow labeled "3" pointing to it.

At this point you may wait for the report to finish running or "Select a delivery method" to have it emailed to you upon completion.

The screenshot shows the report generation interface with a dialog box open. The dialog box has a title bar and contains the text: "Your report is running. Instead of waiting, you can select a delivery method to run the report in the background." Below this text is a button labeled "Select a delivery method." and a "Cancel" button. A red arrow points from the "Select a delivery method." button in the dialog box to the "Select a delivery method." button in the database list of the interface above.

When your report is ready you will be prompted to open or save (exact options will vary by browser).

Recommendation: Use Save As to save as an Excel file with a distinctive name & in a location easy for you to find.

The file may save by default in the new Excel *.xlsx format. I have had trouble loading *.xlsx files from Gale into Alma. Try saving instead in Excel 97-2003 format (*.xls), CSV comma delimited format (*.csv), or Text tab delimited format (*.txt)

The screenshot shows a browser notification at the top that says "Your report is ready and will download to your Web browser in a few moments." Below the notification is a file save dialog box. The dialog box has a title bar and contains the text: "Do you want to open or save vqdv89s49y2w2....xlsx (280 KB) from usagereports.galegroup.com?". Below this text are three buttons: "Open", "Save", and "Cancel". A red arrow points from the "Save" button in the dialog box to the "Save" button in the browser notification.

Two ways to upload usage data in Alma

- **Acquisitions > Import > Load Usage Data**
Can also use this to identify missing data
 - **Acquisitions > Acquisitions Infrastructure > Vendors > (choose a vendor then select Usage Data)**
Requires the Vendor Manager role
 - Details at the Ex Libris Knowledge Center:
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Acquisitions/090Acquisitions_Infrastructure/010Managing_Vendors/Managing_COUNTER-Compliant_Usage_Data#Manually_Uploading_and_Deleting_COUNTER_Data](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Acquisitions/090Acquisitions_Infrastructure/010Managing_Vendors/Managing_COUNTER-Compliant_Usage_Data#Manually_Uploading_and_Deleting_COUNTER_Data)
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Uploading non-COUNTER data

Keep in mind that non-COUNTER data will not provide apples to apples comparisons with COUNTER compliant data, so judge for yourself whether you'd like to include it in Alma.

Vendors should provide details on the usage data they provide. The Project COUNTER website provides very detailed descriptions on what constitutes COUNTER data at <https://www.projectcounter.org/code-of-practice-sections/usage-reports/>

If you do decide to upload non-COUNTER compliant data in Alma you will have to format the reports manually. COUNTER templates are available in the Ex Libris Knowledge Center at

https://knowledge.exlibrisgroup.com/Intota/Intota/0Product_Documentation/Intota%3A_Uploading_Non-COUNTER_Compliant_Usage_Data