

SUSHI Reports video transcript.

Welcome to WorldShare License Manager SUSHI Reports.

Standardized Usage Statistics Harvest Initiative or SUSHI are statistics reports from COUNTER-compliant vendors that you can gather in WorldShare License Manager

The first step for setting up your SUSHI reports is configuring your vendors in the system. Your vendor must be a Counter-compliant vendor. Let's see how you can configure your vendors in WorldShare License Manager.

To configure your vendor, first you need to find your SUSHI-compliant vendor in the system: log in to your WorldShare account and click the Licenses tab on the top menu then on the left side panel click Usage Data accordion. Then enter the search term for your Sushi-compliant vendor then click Search button. If you don't find your vendor, you can request your vendor to be added: click the My Requested Vendors tab then click the Request a Vendor button on the top to submit your request. You will be able to track your request status under the My Requested Vendors tab. But remember, your vendor must be SUSHI compliant to be approved.

For example, let's start to configure a SUSHI compliant vendor by first searching for it on the left side panel under Usage Data accordion, and entering the search term using the part of the vendor's name then clicking Search button.

Identify your vendor on the result list or use the filter options above. After you find your vendor, click the Configure Vendor button located on the right side. Enter your credentials with your vendor (this is the information you have, to access your vendor's SUSHI server- usually an email address or username and your ID number with your vendor) then click the test and save button located above.

Please refer to help.oclc.org for a list of requirements from each vendor.

Once your vendor is configured in the system, you will be able to search for it and either edit the information or delete the configuration.

Another option is if your library is JUSP- Journal Usage Statistic Portal enabled then you can harvest COUNTER 5 usage statistics from JUSP platform directly here in WorldShare License Manager. You can configure JUSP aggregator under My aggregators tab. You can get to this tab either searching for a SUSHI vendor or leaving the search term field in blank and clicking Search button. Then on the result page click Configure button under Actions column on the right to enter your credentials with JUSP.

After you have configured your vendors, then you can establish how you want to harvest your reports. Let's see how you can set up to harvest COUNTER usage SUSHI reports.

There are several types of COUNTER usage reports under the categories of journal, database, platform, book, multimedia, title, and consortia reports.

WorldShare License Manager supports certain COUNTER reports in a variety of categories. Please, refer to help.oclc.org for an updated list of reports currently supported in WorldShare License manager.

You have two options for the reports:

-One-time harvest- for COUNTER files that have been downloaded manually from a vendor's website or reports transferred from configured vendors.

-Recurring harvest- You schedule once then harvest reports ongoing basis. Once a harvest is scheduled for a configured vendor, it can be accessed through the **Harvest History** screen.

To set up one-time harvest, login to WorldShare and click the Licenses tab then on the left side panel click Usage Data accordion then click Harvest Setup button.

Under the one-time harvest tab select the source for your report, if you are transferring files from a configured JUSP aggregator or transferring a file that you have downloaded manually from a vendor's website and saved in your computer or if you are transferring a file directly from the configured vendor.

If transferring file from your computer, then under **One-time Harvest** tab select the Report Source as Manual then search for the vendor that published the COUNTER report entering its name on the search box search under Vendor Name field and selecting it then choose the Counter type and use the dropdown arrow next to Format field to select the supported file format for your vendor then click the Choose File button to upload your file.

If transferring file from a configured vendor, under **One-time Harvest** tab select Report Source as SUSHI- Transfer report file from configured vendor, then search for your vendor and select it under Vendor Name field and select the Counter type- if multiple options are offered.

Then select your report type- you can select multiple types at a time-then use the calendar icon to enter the Start Date and End Date then click the **Save** button on the upper left side to save your selections.

To set up recurring harvest, under the **Recurring Harvest** tab select your Report Source either from aggregator or configured vendor then search for the aggregator or vendor name to select it.

Select the report type you want to generate from the list of supported reports for your vendor - you can choose multiple types of reports, choose the start date clicking the calendar icon next to the respective field and select the status of report- active or inactive then click Save button on the upper left side to save your selections. Your reports will be generated monthly starting on day 15 of each month.

To retrieve your one-time harvesting and recurring harvesting reports login to your WorldShare account, click the Licenses tab click Usage Data option then click the Harvest History button.

You will be able to filter your reports using the filter options on the top.

In this example, I filtered by Harvest type to be **SUSHI** and result counts to be **success**. Then I clicked **View Details** button under Action column for Allen Press Counter 5. You have options to filter this result on the top menu on the filter options. Under Results column on the right, you find the links to the original file and the transformed data in XML or CSV formats. You can perform bulk actions where you can, have the option to select several reports checking the box next to each one and selecting the desired action at Harvest History Actions –Delete the harvest, combine into single CSV File, or Extend delete date by one year.

This is the CSV file of a single COUNTER 5 TR_J1 report from the vendor used in this example.

You can check the summary of your harvests on the left panel under Usage Data and Harvest Summary button: Select Counter Type, the Report Type, the Report Date Range, and the Metric Type then click **Generate Harvest Totals** button to see the results.

Another option under Harvest Summary is to check report coverage: Select the Counter Type, the Report Type, the report date range and the metric type then click the View Report Coverage tab, button, and then under Report Coverage column on the result click Review coverage to see the results.

You can contact OCLC Support, find documentation and more training materials at help.oclc.org. Thanks for watching!