NYU Libraries Alma Training Documentation:

Managing SUSHI Accounts

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# NYU Libraries Alma Training Documentation: Managing SUSHI Accounts

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#### **Related Materials and Resources**

- Alma Documentation
- Alma Migration Guide: Training

#### Who is this document for and what does it cover?

- Intended Audience: Technical Services staff
- This document describes how to create SUSHI accounts for e-resource vendors and manually harvest COUNTER release 5 statistics.

## To get help, or provide feedback on this document

If you have questions or suggested edits please contact Ayse Kocoglu akl36@nyu.edu

### How to add SUSHI accounts to vendor records

- 1. Locate the vendor record that you want to add a SUSHI account for. You can either use the persistent search bar to search for the vendor or select 'Vendors' from the 'Acquisitions' menu under 'Acquisitions Infrastructure' section.
- 2. Select 'Edit' from the ellipsis menu of the vendor record. This will open the 'Vendor Details' page.
- 3. Navigate to the 'Usage Data' tab.

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- **4. Click on 'Add SUSHI Account'** Select Release 5. This opens the SUSHI Account Details page.
- 5. Select the vendor from the dropdown menu 'SUSHI Account'. Vendor URL will get prefilled with the correct URL for the vendor. However, you do not have to select a predefined vendor; you can enter any value you like. In that case you will have to manually enter the URL in the Vendor URL.
- 6. Enter the required credentials in the 'Request Details' section. Each vendor has its own requirements. ExLibris maintains a SUSHI vendor list here and also COUNTER has a registry where these requirements can be found out. Institution specific credentials need to be obtained from the vendor.
- 7. Click on the 'Test Connection' button on the upper right corner. A JSON file will be generated and downloaded. This file can be opened with a Text editor. If your SUSHI Connection Test is successful, you should receive a message that includes a "Service\_Active":true statement. After confirming connection, proceed to the next step to add the report types.
- 8. Click on 'Add Report Type' in the 'Usage Report Types' section.

  Select from the dropdown menu the type of report you would like to receive, click on 'Add'. Repeat for all the report types you would like to receive for this vendor. Each vendor makes only certain types of reports available. What these report types are can also be found on the lists mentioned on step 6.
- 9. Click on 'Save' after successfully adding the SUSHI accounts.

# How to manually run the SUSHI harvesting job

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- 1. There are a few options available for the manual harvest:
  - **a. Select 'Harvest Now' from the ellipsis menu of the SUSHI account** of the vendor and select 'Confirm' on the 'Confirmation Message' pop-up screen. This will harvest usage from the past 12 months for all of the report types defined for this SUSHI account.
  - b. Select 'Custom Harvest' from the ellipsis menu of the SUSHI account. This will allow you to define the date ranges for harvesting usage statistics. Click on 'Add Harvest Date Range' on the 'Custom Harvest' pop-up screen. After selecting a date range you can choose to select 'Add and Close' or select 'Add' to continue adding new date ranges. After adding all of the desired date ranges select 'Harvest'. This will harvest usage for the selected date ranges for all of the report types defined for this SUSHI account.
  - c. Select 'Edit' from the ellipsis menu of the SUSHI account. Then select either 'Harvest Now' or 'Custom Harvest from the ellipsis menus of each of the Report Types. This will allow you to harvest each report type separately.