360 Counter: Getting Started

- **Product:** 360 Counter

What do I need to do to start using 360 Counter?

This document is designed to get you started as quickly as possible with 360 Counter. The information below is not intended to be a complete guide to everything about 360 Counter; rather, it is a place to begin as you start to implement 360 Counter for your library.

This document has three sections; click the section title here to jump straight to that section:

Getting Ready

The 360 Counter tools are part of the Client Center, the administrative hub for your ProQuest management and discovery services. A working understanding of the tools in the Client Center is necessary to work with 360 Counter and any other service in your 360 Suite. If you are familiar with the Client Center and have already set up 360 Core, you can go over this section quickly and focus on the steps in the Getting Set section.

A. Learn about the Client Center

If you are unfamiliar with the Client Center, we encourage you to look at the following:

Watch a series of short videos.

Read about the Client Center.

Attend a webinar or view a recorded session to learn about the Client Center.

B. Populate Data Management

It's important to ensure that Data Management includes all the resources subscribed to by your library. When the usage data is uploaded into 360 Counter, the vendor statistics will be associated with the COUNTER-compliant providers populated in Data Management:

Watch short videos on populating Data Management.

C. Check Account Permissions

To turn on permissions for library staff members to use 360 Counter:

1. From the **Client Center Home** page, click **Client Center Accounts**.
2. Choose the applicable account.
3. On the left side of the **Account Details** page, click **Resource Manager Permissions**.
4. Click the **Edit** button on the upper-right side.
5. Modify the permissions as desired (None, View, or View/Edit):
    - **Counter** - View or add items on the 360 Counter page
    - **Cost Data** - View or add costs to resources
    - **Vendor Statistics Metadata** - View or add metadata describing the statistics that are available from various vendors/providers
    - **Administration** - View or update the Data Retrieval Service (DRS)
6. Click the **Save** button.

D. Fiscal or Calendar Year

360 Counter needs to know which month during the year you want your subscriptions' cost-cycle to begin. For most libraries, this will be January, even libraries whose financial fiscal year begins in a month other than January.

Read about Fiscal and Calendar Years.

Getting Set

For an overview of 360 Counter:

Read the Introduction and Overview to Counter.

To see an overview of the 360 Counter page in the Client Center:

Read about the 360 Counter page.

A. Set Up Data Retrieval Service (DRS)

360 Counter's Data Retrieval Service uses the SUSHI protocol (Standardized Usage Statistics Harvesting Initiative) to retrieve Project-COUNTER-compliant usage-statistics reports from various vendors/providers/publishers and upload them to your Client Center profile:

Read about 360 Counter: Data Retrieval Service (DRS). Note that the document lists a second DRS harvesting method called Administration-Based Harvesting; this method is being phased out due to providers' wide support for SUSHI, and therefore SUSHI is the single harvesting method used for new customers.

Gather and store your providers' usage-statistics login credentials on the DRS Request Form. The form includes some providers that currently do not support SUSHI; some libraries like to use the form to manage all their login credentials in one place. SUSHI setup will take effect automatically the following month.

Note

In addition to having provider login credential on the DRS Form, you have the option to store login credentials in the Vendor Statistics Metadata tool of the Client Center. If you choose to do that, you would need to maintain and update the credentials on both the DRS Form and the Vendor Statistics Metadata tool. Instead, we recommend that you store the login credentials for COUNTER-compliant providers on the DRS Form and non-COUNTER-compliant providers in the Vendor Statistics Metadata tool:

Watch a short video about creating and using Vendor Statistics Metadata

Read an overview of Vendor Statistics

Read about Vendor Statistics Data Sets

Read about getting a file (spreadsheet) of all your login credentials from the Management Reports system.

B. Load Non-COUNTER-Compliant Usage Statistics

Although the DRS can retrieve and load usage-statistics reports from many providers, it can only work with reports that are Project-COUNTER-compliant. There are some providers whose usage-statistics reports are not COUNTER-compliant, so we have instructions for how you can manually upload those reports into 360 Counter:

Read about uploading non-COUNTER-compliant usage data.

Go!

A. View Your Reports of Consolidated Usage Statistics

If you uploaded your own usage reports, the data is "pushed" to the Consolidated Reports per the data upload schedule.

Regardless how the usage statistics got into the Consolidated Report system,

Read the Usage Statistics and Consolidated Reports Overview

Read about Using Consolidated Usage and Cost Reports

B. Adding Resource Cost Information

The Cost tool allows you to add payment information to resources at any level: collection, provider, database, or individual title (holding.) To add or edit payment information, search for the resources in the e-Catalog or browse to the resources from the Data Management Home page, and click on the **Cost** link from the resource's Details page. More than one payment can be added to a resource for a single fiscal year.

Costs can be added individually to resources, or you can use the Cost Data Upload tool to bulk-upload costs:

Watch a short video about adding cost information.

Read about adding cost information to a resource.

Read about adding fund information to a payment.

Read about using the Cost Data Upload Tool.

Read FAQs about Cost Data Upload Tool.

Read how the cost-per-use metric is calculated.

C. Other Resources

As you continue to add data to your 360 Counter system, there are a few more resources you may find useful:

Attend a webinar or view a recorded session to learn more about 360 Counter.

Read the 360 Counter User Guide for details on all the features of 360 Counter.

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