What counts and what doesn’t

Elsevier’s approach to usage statistics and implementation of COUNTER and SUSHI

Berne

April 5th, 2011

Agata Jablonka, Elsevier, Amsterdam
Outline

- Project COUNTER
  - History and organization
- Auditing
- Comparability
- Elsevier
  - COUNTER and additional reports
- SUSHI
- Elsevier Admin Tool
COUNTER = Counting Online Usage of Networked Electronic Resources
- standards that facilitate the recording and reporting of online usage statistics in a consistent, credible and compatible way
- supported by the vendor, intermediary and librarian communities
Project COUNTER – a history

- Launched in March 2002
- First Code of Practice in 2003 (journals and databases)
- Extended to books in 2006
- [http://projectcounter.org](http://projectcounter.org)
Organizational structure

- Not-for-profit company
- Board of Directors
- Executive Committee: responsible for the overall management and direction
- Project Director: Day-to-day management
- Advisory Board

- Marthyn Borghuis of Elsevier is part of Executive Committee
Code of Practice updates

Code of Practice for journals and databases:

- Jan-2003: Release 1
- Apr-2005: Release 2
- Aug-2008: Release 3

There is no fixed timetable for future Releases, as COUNTER responds to the demands of changes in the market. It is not envisaged, however, that there will be a new Release of a given Code of Practice more than every 2-3 years.
The following overall objectives have been set for Release 4: the Books and Reference Works Code will be integrated with the Journals and Databases Code to create a single, unified Code covering all categories of content, including multimedia content; the functionality of XML and SUSHI will be more fully developed and exploited in the design of the usage reports; the implications of the PIRUS2 and Journal Usage Factor projects will be taken into consideration.

The aim is to publish the definitive version of Release 4 in early 2012, with implementation by vendors required by 31 December 2013. To achieve this, COUNTER will work to the following timetable:

**April 2011:** announcement of timetable; invitation to COUNTER members and other parties to submit suggestions for Release 4

**April-June 2011:** evaluation of submitted suggestions by COUNTER Executive

**September 2011- January 2012:** draft Release 4 available for public comment. (Feedback will be sought via email, focus groups and at conference presentations).

**March 2012:** Publication of Release 4 of the Code of Practice

**December 2013:** Deadline for implementation by vendors of Release 4 of the Code of Practice

Both the existing Release 3 of the Code of Practice for Journals and Databases and the existing Release 1 of the Code of Practice for Books and Reference Works will remain valid until December 31 2013.

Suggestions for Release 4 should be submitted by email, before Tuesday 31 May 2011,
Highlights of CoP

Code of Practice defines:

- Layout of report
- What should be counted
- Filtering criteria (double clicks, http return codes)
- Export formats
- E-mail alerting
Auditing

- COUNTER reports are audited by an independent auditor every year
- Last audit at Elsevier successfully completed in Jan-2011

- Checks include:
  - Full text usage reported
  - Double click filter
  - Searches and Sessions
Issues affecting comparability

- Structure of publisher website determines how user navigates through site
  - No publisher site is the same, so usage figures are not fully comparable
  - Not all required reports are applicable to every publisher
<table>
<thead>
<tr>
<th>Report code</th>
<th>Report name</th>
<th>Required/Optional</th>
<th>Elsevier report</th>
<th>SUSHI support</th>
</tr>
</thead>
<tbody>
<tr>
<td>JR1 = Journal Report 1</td>
<td>Number of Successful Full-Text Article Requests by Month and Journal</td>
<td>Required</td>
<td>Yes (ScienceDirect only)</td>
<td>Yes</td>
</tr>
<tr>
<td>JR1a = Journal Report 1a</td>
<td>Number of Successful Full-Text Article Requests from an Archive by Month and Journal</td>
<td>Required</td>
<td>Yes (ScienceDirect only)</td>
<td>Planned 2011</td>
</tr>
<tr>
<td>DB3 = Database Report 3</td>
<td>Total Searches and Sessions by Month and Service</td>
<td>Required</td>
<td>Yes (ScienceDirect and Scopus)</td>
<td>Yes</td>
</tr>
<tr>
<td>CR1 = Consortium Report 1</td>
<td>Number of Successful Full-Text Journal Article or Book Chapter Requests by Month (XML only)</td>
<td>Required</td>
<td>Yes (ScienceDirect only)</td>
<td>Planned 2011</td>
</tr>
<tr>
<td>BR2 = Books report 2</td>
<td>Number of Successful Section Requests by Month and Title</td>
<td>Required</td>
<td>Yes (ScienceDirect only)</td>
<td>Planned 2011</td>
</tr>
</tbody>
</table>
### Additional COUNTER reports

<table>
<thead>
<tr>
<th>Report code</th>
<th>Report name</th>
<th>Required/Optional</th>
<th>Elsevier report</th>
</tr>
</thead>
<tbody>
<tr>
<td>JR2 = Journal Report 2</td>
<td>Turnaways by Month and Journal</td>
<td>Required</td>
<td>No, ScienceDirect has no turnaway concept</td>
</tr>
<tr>
<td>JR5 = Journal Report 5</td>
<td>Number of Successful Full-Text Article Requests by Year-of-Publication and Journal</td>
<td>Required (option JR1a or JR5)</td>
<td>No, JR1a is offered as alternative</td>
</tr>
<tr>
<td>DB1 = Database Report 1</td>
<td>Total Searches and Sessions by Month and Database</td>
<td>Required</td>
<td>No, ScienceDirect and Scopus do not offer databases</td>
</tr>
<tr>
<td>DB2 = Database Report 2</td>
<td>Turnaways by Month and Database</td>
<td>Required</td>
<td>No, ScienceDirect and Scopus have no turnaway concept</td>
</tr>
<tr>
<td>CR2 = Consortium Report 2</td>
<td>Total Searches by Month and Database (XML only)</td>
<td>Required</td>
<td>No, ScienceDirect and Scopus do not offer databases</td>
</tr>
<tr>
<td>JB1 = Journal/Book Report 1</td>
<td>Number of Full-Text item Requests by Month and Title (XML only) -optional</td>
<td>Optional</td>
<td>No</td>
</tr>
<tr>
<td>JR3 = Journal Report 3</td>
<td>Number of Successful Item Requests and Turnaways by Month, Journal and Page-Type - optional</td>
<td>Optional</td>
<td>No</td>
</tr>
<tr>
<td>JR4 = Journal Report 4</td>
<td>Total Searches Run by Month and Service – optional</td>
<td>Optional</td>
<td>No</td>
</tr>
</tbody>
</table>
Elsevier: more than just COUNTER

• **ScienceDirect additional reports:**
  - 5 journal reports, 5 book reports, 1 search report, 6 general usage, 4 navigation and linking reports

• **Scopus additional reports:**
  - 2 general usage, 2 search reports, 5 linking reports, 1 research performance report

• **COUNTER archive back to 2007 (JR1)**

• **Easy to use website**

• **http://usagereports.elsevier.com**
Elsevier and SUSHI
SUSHI

- **Standardised Usage Harvesting Initiative**
- Protocol to facilitate the automated harvesting and consolidation of usage statistics from different vendors
- Developed by National Information Standards Organization (NISO)
- Included as a requirement in Release 3 of the COUNTER CoP

http://www.niso.org/schemas/sushi/index.html#COUNTER
SUSHI - Benefits

- Automated retrieval of Usage Reports
- Customized aggregation and reflection of chosen data
- Compare Usage across different publishers

As a result, assessment of

- Value
- Interest
- Training Needs

is possible
SUSHI Pilot Projects

- Every customer has to be set up for SUSHI individually: on boarding
- Process takes 4-6 weeks after signing agreements
  - NB: Technical work involved at customer site
- Currently first on boarding with customers (1 Roll Out for the UK consortium, 2 additional consortia are currently testing)
SUSHI Pilot Projects

- Facilitate first adopters
- Learn from first pilots with regards to:
  - ‘readiness’ and knowledge on the part of the users
  - cooperation with service providers
  - internal workflow, stakeholders and required resources
SUSHI Pilot Projects

- ScienceDirect and Scopus only
- Reports as per currently available for both platforms as per Usage Reporting Tool
Elsevier Admin Tool
Elsevier Admin Tool – What you can do with it

- Helps administrators manage electronic resources
- Create or edit Groups of users within an account
- Manage your users’ access rights, based on IP ranges
- Manage your users’ profiles and IDs
- Configure interlibrary loan/document delivery
- Set Up your own Library Branding
- Access to Usage Reports
- ScienceDirect and Scopus Linking
Elsevier Admin Tool

- Available for SciVerse ScienceDirect and SciVerse Scopus
- Free of charge to all subscribers
- Heavily user tested before roll out

https://admintool.elsevier.com and http://www.info.admintool.elsevier.com
Elsevier Admin Tool - Benefits

- Helps managing ScienceDirect and Scopus accounts quickly and efficiently
- Intuitive Interface, easy to use
- Online tutorials and context-sensitive help available to get started fast
Elsevier Admin Tool – How to set up the Account

Contact:

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Thank you!

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