



## Introduction to 360 Counter and Usage Reporting in Client Center and Intota Assessment



Donna Boecker  
ProQuest Workflow Solutions

March 2015




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### Agenda

- What is Counter?
- Counter Code of Practice, Compliant Vendors & Reports
- SUSHI Harvesting
- 3 Ways to Upload Usage Data
- Data Retrieval Service Form
- Client Center and Counter Reports Page
- Best Practices
- Intota Assessment Counter Reports

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### Client Center Accounts

Click to add an account.

Account List	Name	Email	Contact Type	Phone #	Last Login	Add
	Shara Perkes ProQuest Trainer	shara.proquest@gmail.com	Additional		05/21/2014 11:50:09	

An email with login instructions will be sent to the account holder.

Assign appropriate permissions when you add a new account.

**Jennifer Smith**

- Account Details
  - General
  - Permissions
    - 360 Core Permissions
    - 360 Resource Manager Permissions
  - Email Notices
- Administration View/Edit
- Licensing View/Edit
- Contacts View/Edit
- Notes View/Edit
- Vendor Statistics Metadata View/Edit
- Menus View/Edit
- Alerts View/Edit
- Collections View/Edit
- Cost Data View/Edit
- Counter None
- Resource Renewals View/Edit

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**What is Project Counter?** 

- Project COUNTER – [www.projectcounter.org](http://www.projectcounter.org)  
(Counting Online Usage of Networked Electronic Resources)
- Created to improve the reliability of online usage statistics
- The objective is to create an electronic usage reporting standard which ensures that all Counter-compliant vendor online usage data is credible, compatible and consistent

Code of Practice:  
[http://www.projectcounter.org/code\\_practice.html](http://www.projectcounter.org/code_practice.html)

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**Project Counter** 

**COUNTER** Counting Online Usage of Networked Electronic Resources

Home About Counter FAQs Code of Practice Needs and Activities Compliant Vendors Contact Us Members Usage Policy

Update New Usus community website

Click here to apply for COUNTER Membership

Follow @ProjectCOUNTER

**COUNTER compliance - a step-by-step Guide for vendors**

The purpose of this Guide is to take Vendors who are interested in becoming COUNTER compliant through the compliance process, to enable them to select the COUNTER reports that are relevant to their products, and to describe what happens once a Vendor has become compliant. COUNTER compliance is a step-by-step Guide to Vendor.

**COUNTER Sponsors**

The bulk of COUNTER's financial support comes from our members in the form of annual membership fees, and this is the backbone of the organization's fiscal stability. In addition, COUNTER also accepts larger donations from organizations that are keen to provide greater financial support and to distinguish such organizations as Gold, Silver or Bronze Sponsors. COUNTER would like to thank the following Sponsors that have made generous donations this year:

**Gold Sponsor**

  
ScholarlyIQ <http://www.scholarlyiq.com>

**Silver Sponsor**

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**Counter Code of Practice (R4)** 

**Codes of Practice**

Last updated: April 2014

**COUNTER compliance**

The purpose of this Guide is to enable Vendors to select the reports that are relevant to their products, and to describe what happens once a Vendor has become compliant. COUNTER compliance is a step-by-step Guide to Vendor.

**Release 4 of the Code of Practice**

Release 4 of the COUNTER Code of Practice is a single document that replaces both Release 3 and Release 4. This Release is the result of the COUNTER Reference Works. The document is compliant with Release 4 of the Code of Practice as of 31 December 2014.

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Note: Sections 2, 3, 4, and 5 contain the core information required for implementation of Release 4 of the COUNTER Code of Practice.

compliance process, to  
ce a Vendor has  
April 2012)  
Plans and intermediaries,  
sta content. As such it  
office for Books and  
By those vendors  
Release 4 before that  
see 3 for Journals and

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## Usage Data Uploading



### 3 Ways to Upload Electronic Usage Data

- Administration-based Harvesting: DRS team retrieves, cleans, and uploads your COUNTER compliant usage statistics from various vendors, providers, and publishers
  - DRS uploads occur twice a year by default: July and February of next year
  - More frequent uploading is available upon request
  - January (annual) upload overlays first 6 month upload
- SUSHI:** Automatic harvesting via server-to-server upload of Counter data from SUSHI compliant vendors; we have no visibility to your data, formatting, etc.
- Manually by the Library (typically for non-Counter compliant data/vendors)

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## Counter-Compliant Vendors & Reports



**COUNTER**  
Code of Practice for e-Resources: Release 4  
for e-Resources  
NOTE: This list of Counter-compliant vendors & reports is the foundation upon which our Data Retrieval Service (DRS) Form is created

Vendor	Journal Reports	Database Reports	Book Reports	Multimedia Reports
American Chemical Society	Yes	Yes	Yes	Yes
EBSCO Publishing	Yes	Yes	Yes	Yes
IEEE Information Systems	Yes	Yes	Yes	Yes
International Business Machines	Yes	Yes	Yes	Yes
Journal of the American Library Association	Yes	Yes	Yes	Yes
Journal of the American Society for Information Science and Technology	Yes	Yes	Yes	Yes
Journal of the American Statistical Association	Yes	Yes	Yes	Yes
Journal of the International Association of Agricultural Librarians and Documentalists	Yes	Yes	Yes	Yes
Journal of the National Library of Medicine	Yes	Yes	Yes	Yes
Journal of the American Musicological Association	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association - Equine Edition	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association - Small Animal Edition	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association - Veterinary Practice Edition	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association - Veterinary Record Edition	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association - Veterinary Record Edition - International	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association - Veterinary Record Edition - UK	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association - Veterinary Record Edition - US	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association - Veterinary Record Edition - US/Canada	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association - Veterinary Record Edition - US/Canada/UK	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association - Veterinary Record Edition - US/Canada/UK/US/Canada/UK/US/Canada/UK	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association - Veterinary Record Edition - US/Canada/UK/US/Canada/UK/US/Canada/UK/US/Canada/UK	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association - Veterinary Record Edition - US/Canada/UK/US/Canada/UK/US/Canada/UK/US/Canada/UK/US/Canada/UK	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association - Veterinary Record Edition - US/Canada/UK/US/Canada/UK/US/Canada/UK/US/Canada/UK/US/Canada/UK/US/Canada/UK	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association - Veterinary Record Edition - US/Canada/UK/US/Canada/UK/US/Canada/UK/US/Canada/UK/US/Canada/UK/US/Canada/UK/US/Canada/UK	Yes	Yes	Yes	Yes
Journal of the American Veterinary Medical Association - Veterinary Record Edition - US/Canada/UK/US/Canada/UK/US/Canada/UK/US/Canada/UK/US/Canada/UK/US/Canada/UK/US/Canada/UK/US/Canada/UK	Yes	Yes	Yes	Yes

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## DRS form access



SeriesSolutions 1-800-526-6163 (737-4037) New Account | Support Center | Order Comments | Contact Us | Log Out | Site Map

Current Library: PROQUEST Internal - COUNTER Compliance | Log Out | Site Map

Home > 300 Counter

300 Counter

Vendor: Publisher: Report Range: Upload Date: Uploaded By: Status

Vendor	Report	Date	Vendor	Publication	Report Range	Upload Date	Uploaded By	Status
EBSCO	EBSCO	12/2013	Multiple Publishers	12/2013 - 12/2013	00/1/2013-00/1/2013	00/1/2013-00/1/2013	SeriesSolutions@Proquest.com	X
EBSCO	EBSCO	12/2013	American Chemical Society	Multiple Publishers	12/2013 - 12/2013	00/1/2013-00/1/2013	SeriesSolutions@Proquest.com	X
EBSCO	EBSCO	12/2013	American Chemical Society	Multiple Publishers	12/2013 - 12/2013	00/1/2013-00/1/2013	SeriesSolutions@Proquest.com	X
EBSCO	EBSCO	12/2013	EBSCOhost	Multiple Publishers	12/2013 - 12/2013	00/1/2013-00/1/2013	SeriesSolutions@Proquest.com	X
EBSCO	EBSCO	12/2013	EBSCOhost	Multiple Publishers	12/2013 - 12/2013	00/1/2013-00/1/2013	SeriesSolutions@Proquest.com	X

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### DRS request form

ProQuest

**DRS Request Form** Upload Export Refresh ?

Type	Provider	Comp.	Adm.	Libra	Provider URL	User	Pass	JR1	JR2	JR14	JR15
JK	Alexander Street Press				http://sushi4.scholarlyiq.com/sushiservice.svc						
JK	Allen Press, Inc		✓		http://sushis4.allenpress.com/factors/institutions/usage/report	libuser@msu.edu		✓	✓		
JR14	Allen Press, Inc				http://sushis4.allenpress.com/factors/institutions/usage/report						
	Alliance of Crop, Soil, and Environmental Science Soc				http://www.sciencesocietysreports.org/						

Allen Press, Inc http://www.allenpress.com Non-working vendors will be disabled and grayed-out on DRS Form  
Legal Issue

**Reporting Frequency:** Twice a Year Edit

**Contact Info** Alternate Contact for DRS

**Name:** Donna **Name:** Changes Last Saved: 01/02/2015 15:04:00

**Phone:** **Phone:** Changed By: Boecker, Donna

**Email:** donna.boecker@proquest.com **Email:** Edit

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### Data Retrieval Configuration

Intota

Previous Provider Save & Go to Next Provider Save & Exit Next Provider ?  
Delete Details Cancel

Fields in bold indicate required information for usage statistics to be harvested and uploaded. These fields are not required to save this form.

DRS Provider Name: EBSCOhost Counter 4 Compliant

Admin Note:

Custom URL:

Please note: Unless otherwise specified, UN/PW required for all vendors

**UserName:**

**Password:**

Add a Library Note:

**Reports Available:**

JR1	DB1	DB2	PK1	BR1	BR2	BR3
✓	✓	✓	=	✓	✓	✓

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### SUSHI REQUEST

Intota

Fields in bold indicate required information for usage statistics to be harvested and uploaded. These fields are not required to save this form.

DRS Provider Name: Alexander Street Press Counter 4 Compliant

Admin Note:

Custom URL:

**Test SUSHI Settings**

**Required SUSHI Credentials:**

**Requestor ID:**  **Requestor Name:**

**Requestor Email:**

**Customer Id:**  **Customer Name:**

**User Name:**  **Password:**

**Add a Library Note:**

**Reports Available:**

JR1
✓

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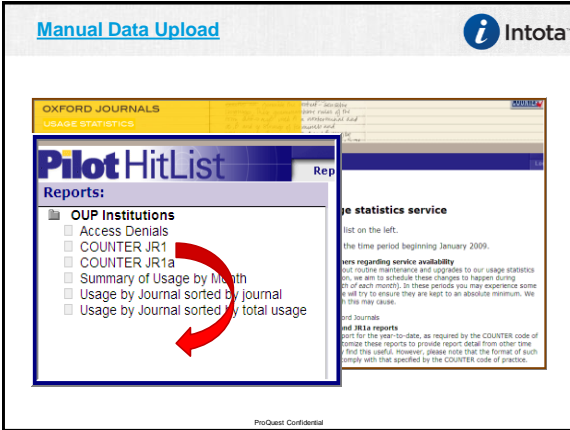
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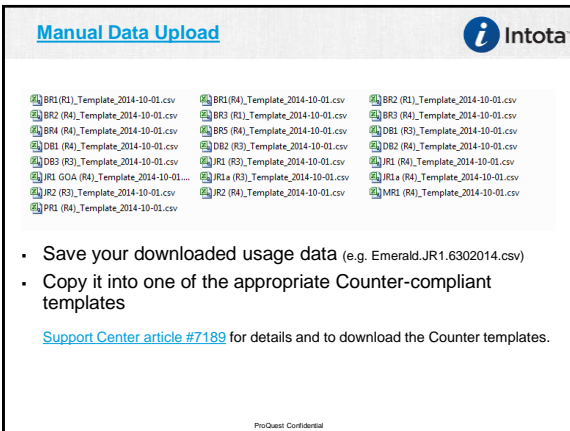
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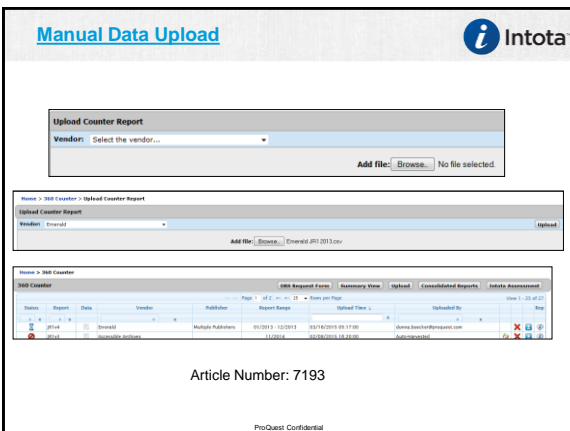
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**Counter Best Practices** 

**TOP 5 DRS/Counter Best Practices:**

1. Keep your DRS form updated and reflective of new resources added to your collection
2. Seriously consider SUSHI impact – especially if you're on Quarterly upload schedules
3. Add Costs and Fund Accounts to your resources to create reports that help you view your Counter data in different ways
4. Upload Non-Counter compliant data knowing that the definitions for Use, Search or Session may not be consistent with the Counter Code of Practice
5. Remember that the deadline for uploading costs/usage data is Monday at 7:00pm EST for availability by Friday, 6:00pm EST ([SC Article #10940](#))

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**A Few Words About SUSHI** 

- Uploads occur once a month – 2nd day of the month
- SUSHI reports do not overlay like DRS-uploaded reports do; they represent discrete monthly usage
- Frequent Upload Failures– read admin notes on DRS form to maximize uploading success
- Request another upload (Re-harvest) from Counter Reports page 
- "View Log" on the Counter Reports page lists upload errors

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**Counter Best Practices** 

**Keep the 360 Counter DRS email from Support!**

- After our support team uploads your Counter usage data (non-SUSHI), we send you an email containing 2 important things:
  1. An Counter Upload Status Report spreadsheet containing information about the status of your uploaded reports.
  2. Zip file that contains your original CSV files that were uploaded to your 360 Counter profile.

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**Intota Assessment Login** 

**INTOTA ASSESSMENT**

Comprehensive assessment capabilities of holdings, usage and overlap for both monographs and serials, in both print and electronic formats.





**INTOTA ASSESSMENT**

USAGE    RESOURCES ACQUIRE    SERIALS/ RESOURCES    RESOURCES RESELECT

**LOGIN**

scott.bluh@proquest.com

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Remember me

Forgot username / password ?

SIGN IN

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**Menu Options** 

**Choose your report**

Cost Per Use	Usage	Accreditation
<b>Book</b>	<b>Book</b>	<b>ACRL #18</b>
Ebook Report (BR1, BR2, BR3)	Ebook Performers (BR1 & BR2)	ACRL #19
	Ebook Report (BR1, BR2, BR3)	ACRL #20
<b>Database</b>	Ebook Change in Use (BR1 & BR2)	SCOHUL D7
Change Report (DB1)	Ebook Turnover (BR1 & 4)	SCOHUL D8
	Ebook Zero Usage (BR1, 2 & 5)	SCOHUL D9
<b>Journal</b>	<b>Database</b>	
Journal Report (JR1)	Top Charts (Closed)	
Journal Auth Titles by Subj with CPU (JR1)	Class Performance (DB1)	
	Class Report (DB1)	
	Class Usage by Freq (DB1)	
	Class Change in Use (DB1)	
	Class Turnover (DB1)	
	Class Zero Usage (DB1)	
	Serials Report (DB1)	
	Platform Report (PR1)	
	Provider Report	
	Combined Serials and Platform (DB1, PR1)	
	<b>Journal</b>	
	Top Charts (All Journals)	
	Journal Performance (JR1)	
	Journal Report (JR1)	
	Journal Usage by HCCC (JR1)	
	Journal Usage by Freq (JR1)	
	Journal Change in Use (JR1)	
	Journal Turnover (JR1)	
	Journal Zero Usage (JR1)	
	Journal Records from an Archive (JR1a)	
	Archived & Combined Journal Holdings (JR1 & JR1a)	
	Journal Item Two or More Providers (JR1)	
	Journal GMI Open Access (JR1 GGA)	

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**Cost-Per-Use Reports** 

Choose your report

Cost Per Use	Book	Database	Journal
Usage	Ebook Report (BR1, BR2, BR3)	Database Report (DB1)	Journal Report (JR1)
Accreditation			Journal Auth Titles by Subj with CPU (JR1)

Usage and CPU Reports reflect the cost-per-use only if:

- Costs have been added to resources in the Client Center at Database or Title level;
- The appropriate Counter report has been ordered (DRS) and uploaded successfully;
- Titles in the report match to your subscribed/tracked holding in the Client Center (Data Management)

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### Usage Reports

Choose your report ▾

Cost Per Use	Book	Database	Journal
Usage	Ebook Performers (BR1 & BR2)	Top Charts (Cbase)	Top Charts (Journals)
Accreditation	Ebook Report (BR1, BR2, BR3)	Database Performers (DB1)	Ejournal Performers (JR1)
	Ebook Change in Use (BR1 & BR2)	Database Report (DB1)	Ejournal Report (JR1)
	Ebook Turnaways (BR3 & 4)	Database Usage by Fund (DB1)	Ejournal Usage by HLCC (JR1)
	Ebook Zero Usage (BR1, 2 & 3)	Database Change in Use (DB1)	Ejournal Usage by Fund (JR1)
		Database Turnaways (DB2)	Ejournal Change in Use (JR1)
		Database Zero Usage (DB1)	Ejournal Turnaways (JR2)
		Service Report (DB3)	Ejournal Zero Usage (JR1)
		Platform Report (PR1)	Ejournal Request from an Archive (JR1a)
		Provider Report	Archived & Combined eJournal Holdings (JR1 & JR1a)
		Combined Service and Platform (DB3, PR1)	Journals from Two or More Providers (JR1)
			Ejournal Gold Open Access (JR1, GOA)

- Costs / cost-per-use are also displaying in Usage Reports
- Counter-compliant reports are distinguished in the menu by report type (e.g. BR1 & BR2; DB1;DB2; JR1,JR2,JR1a;JRGOA)

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### Accreditation Reports

Choose your report ▾

Cost Per Use	ACRL #18
Usage	ACRL #19
Accreditation	ACRL #20
	SCONUL D7
	SCONUL D8
	SCONUL D9

- Designed to assist in answering specific questions on accreditation forms.
- Built upon standard Counter JR and DB reports.
- Should see future development in this area – it’s a common request by customers looking for additional assistance in completing ACRL/SCONL forms.

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### Creating and Manipulating Reports

Choose your report ▾

Cost Per Use	Book	Database	Journal
Usage	Ebook Performers (BR1 & BR2)	Top Charts (Cbase)	Top Charts (Journals)
Accreditation	Ebook Report (BR1, BR2, BR3)	Database Performers (DB1)	Ejournal Performers (JR1)
	Ebook Change in Use (BR1 & BR2)	Database Report (DB1)	Ejournal Report (JR1)
	Ebook Turnaways (BR3 & 4)	Database Usage by Fund (DB1)	Ejournal Usage by HLCC (JR1)
	Ebook Zero Usage (BR1, 2 & 3)	Database Change in Use (DB1)	Ejournal Change in Use (JR1)
		Database Turnaways (DB2)	Ejournal Turnaways (JR2)
		Database Zero Usage (DB1)	Ejournal Zero Usage (JR1)
		Service Report (DB3)	Ejournal Request from an Archive (JR1a)
		Platform Report	Archived & Combined eJournal Holdings (JR1 & JR1a)
		Provider Report	Journals from Two or More Providers (JR1)
		Combined Service and Platform	Ejournal Gold Open Access (JR1, GOA)

- Choose your report > Usage > Ejournal Report (JR1)

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## Creating and Manipulating Reports

Need Help?

Every report must begin with the "Month from/to" filter to define the scope of the report. Other filters allow you to refine the results, narrow the report.

- Date range can be calendar or fiscal year; must be in a specific Year-Month (2014-01) format
- Report Filters with \* are mandatory before a report can be created
- **Report Type:** View data by Year or by Quarter
- **DOI =** Counter 4 data point
- Narrow the results using Provider/DOI/Authority Title/ISSN filters



## New Report View

Filters are still located at the top of the report space (shown)



## Provider Filter



### Provider Filter

Select Values

Available: Oxford University Press

Selected: Oxford University Press

Apply

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### Provider Filter

Title	Author	Title	Provider	Publisher	Digital Object Identifier	Program	Price	ISBN	ISSN	Cost per Unit
...	...	...	Oxford University Press	...	...	...	...	...	...	...

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### Creating and Manipulating Reports

Report Report (DR)

Scroll through the report

Title	Author	Title	Provider	Publisher	Digital Object Identifier	Program	Price	ISBN	ISSN	Cost per Unit
...	...	...	...	...	...	...	...	...	...	...

Print, Export, PDF, CSV Report, XML Report

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### Customizing the Report Space

**Journal Report (JRI)**  
 Report run: 1/22/2013 10:26:49 AM  
 Results come from successful Full Text Article requests (JRI) and by activity type ft\_total when provided. Cost per line is calculated when you track cost.  
 Default sort based on the far left column. To sort by another dimensional column, right click and drag column to the far left to rearrange in order. Use the pagination arrows at the top of the report to go to the next page or to view the full report.

Right-click your mouse over the column header to view additional formatting capability

Authority Title	Sort Column	Object
All in the day		
Art Proceedings	Art proceedings	
Accounting Research Journal	Accounting research journal	
Accounting, Auditing & Accountability Journal		
Advances in Oral Diagnosis	Advances in oral diagnosis	
Advances in Mental Health and Intellectual Disabilities	Advances in mental health and intel disabilities	
Advances in Mental Health and Learning Disabilities	Advances in mental health and learning disabilities	
Asian Journal of Economic and Management Studies	Asian journal of economic and management studies	
Agricultural Finance Review	Agricultural finance review	Emerald Emerald
Aircraft Engineering and Aerospace Technology	Aircraft engineering and aerospace technology	Emerald Emerald
American Journal of Police	American journal of police	Emerald Emerald
American Journal of Business	American journal of business	Emerald Emerald
Anti-Corruption Methods and Materials	Anti-corruption methods and materials	Emerald Emerald
Archives: Eye	Archives (Oxford, England)	Emerald Emerald
Archives: Marketing	Archives marketing (English, England)	Emerald Emerald
Asia Pacific Journal of Marketing and Logistics	Asia Pacific journal of marketing and logistics	Emerald Emerald
Asia Pacific Journal of Business Administration	Asia Pacific journal of business administration	Emerald Emerald
Asian Education and Development Studies	Asian education and development studies	Emerald Emerald
Asian Journal on Quality	Asian journal on quality	Emerald Emerald
Asian Libraries	Asian libraries: the library & information services journal	Emerald Emerald
Asian Review of Accounting	Asian review of accounting	Emerald Emerald
Assembly Automation	Assembly automation	Emerald Emerald



### Page Options

**Apply Saved Customization:** Saved custom versions can be selected here

**Save Current Customization:** Save the custom version of your report or make it the default view

**Edit My Customizations:** Rename, delete, control custom versions

**Clear My Customizations:** Remove saved custom versions



# THANK YOU!

<http://www.proquest.com/go/trainingeval>

