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

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ProQuest Workflow Solutions

March 2015

ProQuest

Agenda

Intota

- 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

Client Center Accounts

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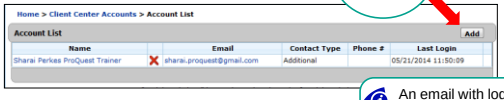
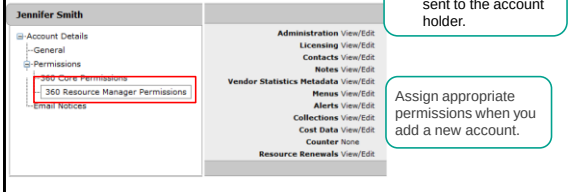
Click to add an account.



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



Assign appropriate permissions when you add a new account.

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What *is* Project Counter?

Intota

- Project COUNTER – www.projectcounter.org
  (**C**ounting **O**nline **U**sage of **N**etworked **E**lectronic **R**esources)
- 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

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Project Counter

Intota

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Counter Code of Practice (R4)

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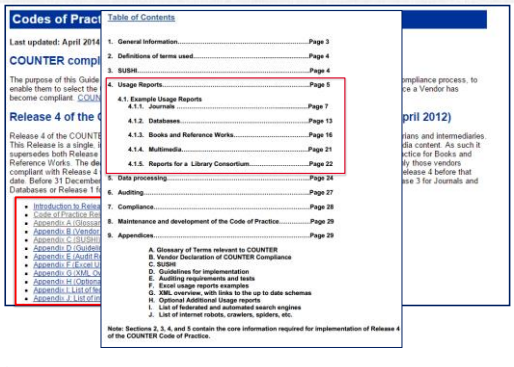

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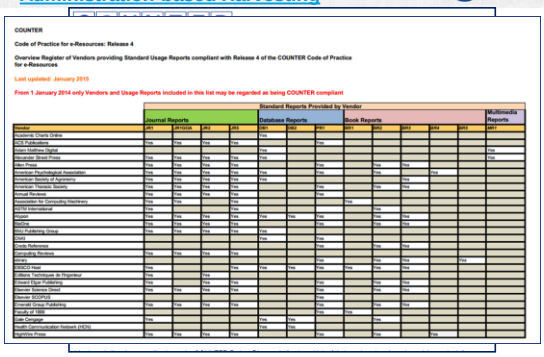
Data Retrieval Service: Administration-based Harvesting



COUNTER

Code of Practice for e-Resources: Release 4

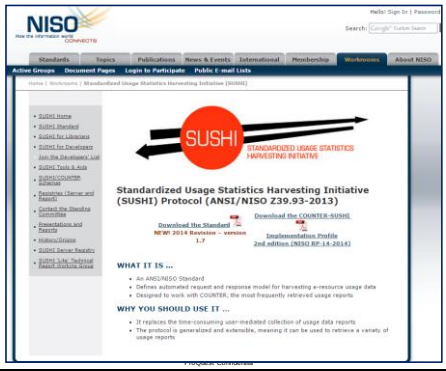
Overview Register of Vendors providing Standard Usage Reports compliant with Release 4 of the COUNTER Code of Practice for e-Resources

Last updated: January 2015

From 1 January 2014 only Vendors and Usage Reports included in this list may be regarded as being COUNTER compliant

	Standard Reports Provided by Vendor											
	Journal Reports				Database Reports			Book Reports				Multimedia Reports
Vendor	JR1	JR1GOA	JR2	JR5	DB1	DB2	PR1	BR1	BR2	BR3	BR4	MR1
Academic Charts Online					Yes							
ACS Publications	Yes	Yes	Yes	Yes			Yes					
Adam Matthew Digital					Yes							Yes
Alexander Street Press	Yes	Yes	Yes	Yes	Yes							Yes
Allen Press	Yes	Yes	Yes	Yes			Yes		Yes	Yes	Yes	
American Psychological Association	Yes	Yes	Yes	Yes	Yes		Yes		Yes		Yes	
American Society of Agronomy	Yes	Yes	Yes	Yes	Yes					Yes		
American Thoracic Society	Yes	Yes	Yes	Yes			Yes			Yes		
Annual Reviews	Yes	Yes	Yes	Yes			Yes					
Association for Computing Machinery	Yes	Yes		Yes				Yes				
ASTM International	Yes			Yes					Yes			
Atypon	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes		
BioOne	Yes	Yes	Yes	Yes			Yes		Yes	Yes		
Bird Publishing Group	Yes	Yes	Yes	Yes	Yes							
Cabi					Yes		Yes					
Credo Reference							Yes		Yes	Yes		
Consulting Reviews	Yes	Yes	Yes	Yes								
ebrary							Yes		Yes	Yes	Yes	
EBSCO Host	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes		
Editions Techniques de Thrombose	Yes		Yes									
Edward Elgar Publishing	Yes		Yes	Yes			Yes		Yes	Yes		
Elsevier Science Direct	Yes	Yes	Yes	Yes			Yes		Yes	Yes		
Elsevier SCOPUS							Yes					
Emerald Group Publishing	Yes	Yes	Yes	Yes			Yes		Yes	Yes		
Faculty of 1000							Yes	Yes				
Gale Cengage	Yes				Yes	Yes			Yes			
Health Communication Network (HCN)					Yes	Yes						
Highwire Press	Yes	Yes	Yes	Yes			Yes		Yes		Yes	

SUSHI Standard



SUSHI Usage Data Harvesting

- Automated harvesting (server-to-server in XML format) of Counter usage data (required in R3 Code of Practice in 2008)
- Usage data is harvested by SUSHI protocol **once per month for a single, discrete month**

Usage Data Uploading

3 Ways to Upload Electronic Usage Data

1. 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
2. **SUSHI:** Automatic harvesting via server-to-server upload of Counter data from SUSHI compliant vendors; we have no visibility to your data, formatting, etc.
3. Manually by the Library (typically for non-Counter compliant data/vendors)

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Counter-Compliant Vendors & Reports

NOTE: This list of Counter-compliant vendors & reports is the foundation upon which our Data Retrieval Service (DRS) Form is created

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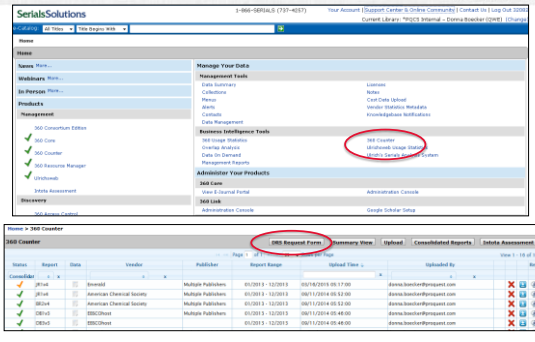
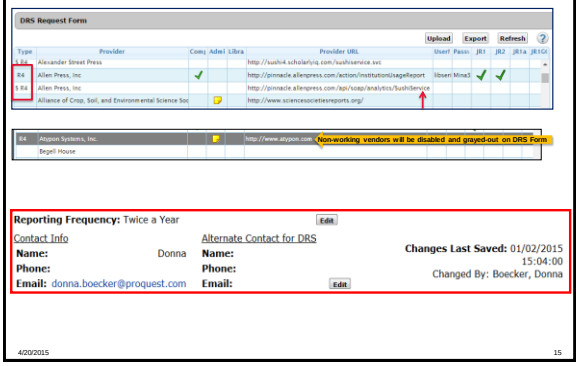
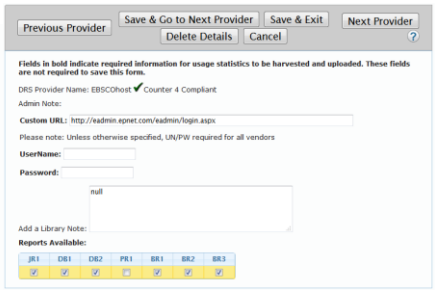
DRS form access



DRS request form



Data Retrieval Configuration



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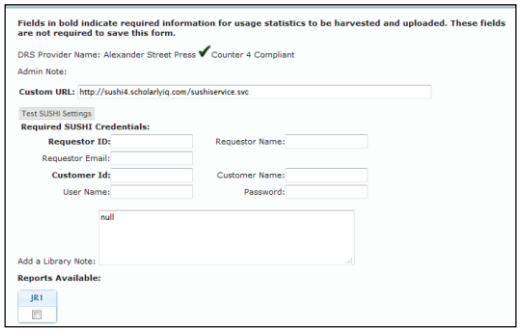
SUSHI REQUEST



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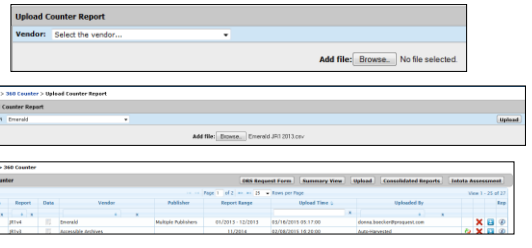
Manual Data Upload

Manual Data Upload

- Save your downloaded usage data (e.g. Emerald.JR1.6302014.csv)
- Copy it into one of the appropriate Counter-compliant templates

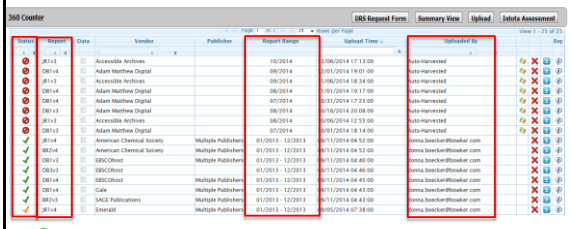
Support Center article #7189 for details and to download the Counter templates.

Manual Data Upload



Article Number: 7193

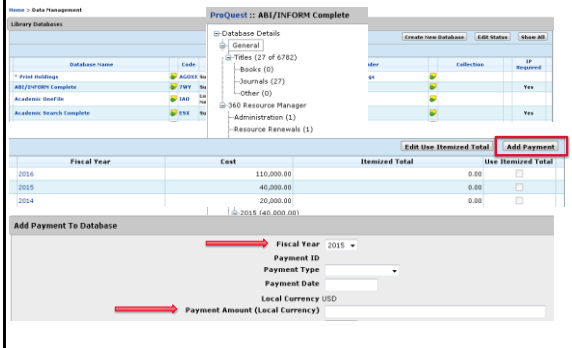
Counter Homepage



Indicates the file processed successfully. You will see this when you have our DRS department upload the data for you.

Indicates there was an error processing the information. You will most likely see these with SUSHI Harvested, or manually uploaded reports.

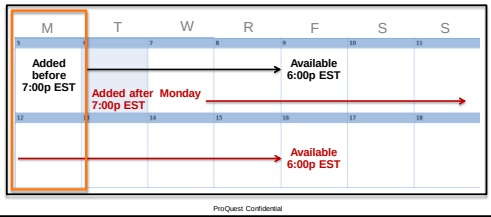
Adding Costs



Cost & Usage Data Upload Schedule

As of July 2014, ProQuest changed the timeframe for uploading usage, cost and fund account data to Intota/IA:

- Data from Counter is captured weekly, every Monday at 7:00p Eastern Time
- Data entered by clients before Monday, 7:00p EST will be available in Intota Assessment Reports by Friday at 6:00p Eastern Time



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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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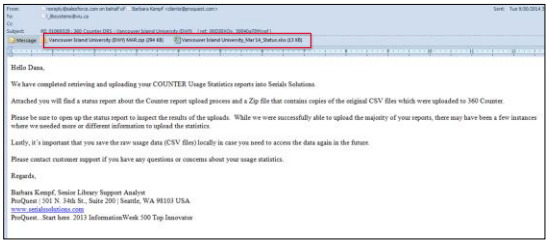
Counter Best Practices



Hello Dana,

We have completed retrieving and uploading your COUNTER Usage Statistics reports into Serials Solutions.

Attached you will find a status report about the Counter report upload process and a Zip file that contains copies of the original CSV files which were uploaded to 360 Counter.

Please be sure to open up the status report to inspect the results of the uploads. While we were successfully able to upload the majority of your reports, there may have been a few instances where we needed more or different information to upload the statistics.

Lastly, it's important that you save the raw usage data (CSV files) locally in case you need to access the data again in the future.

Please contact customer support if you have any questions or concerns about your usage statistics.

Regards,

Barbara Kempf, Senior Library Support Analyst
ProQuest | 501 N. 34th St., Suite 200 | Seattle, WA 98103 USA
www.serialssolutions.com
ProQuest...Start here. 2013 InformationWeek 500 Top Innovator

- Email is sent directly to the primary contact on DRS Form and is also available in your Support Center cases list.

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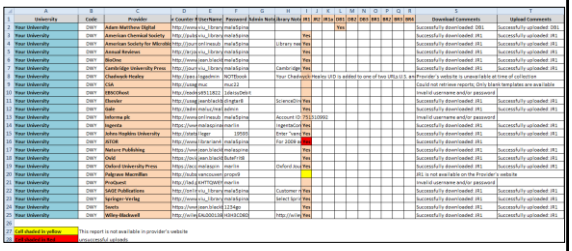
Counter Best Practices

Upload Status Report Spreadsheet



University	Code	Provider	Counter	User Name	Password	Admin Note	Library Note	JR1	JR1a	DB1	DB2	DB3	PR1	PR1a	Download Comments	Upload Comments
Your University	DWY	Adam Matthew Digital								Yes					Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	American Chemical Society						Yes							Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	American Society for Microbio					Library has	Yes							Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	Annual Reviews						Yes							Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	BioOne						Yes							Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	Cambridge University Press					CamBridge	Yes							Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	Chadwyck-Healey			NOTEbook		Your Chadwyck-Healey LFD is added to one of two URLs (L1 &								Provider's website is unavailable at time of collection	
Your University	DWY	CSA			mus22										Could not retrieve reports. Only blank templates are available	
Your University	DWY	EBSCOhost			zebra2admin										Invalid username and/or password	
Your University	DWY	Elsevier			sheardat08		ElsgateR	ScienceDir	Yes						Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	Gale			admin				Yes						Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	Informa plc						Account ID:	751310002						Invalid username and/or password	
Your University	DWY	Ingenta			marie			IngentaCon	Yes						Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	Johns Hopkins University			tigger		10585	Prior "new	Yes						Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	JSTOR			librarian			for 2009 a	Yes						Successfully downloaded JR1	
Your University	DWY	Nature Publishing			mariejayne				Yes						Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	Ovid							Yes						Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	Oxford University Press			marie			Oxford Jou	Yes						Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	Palgrave Macmillan			prop69										JR1 is not available on the Provider's website	
Your University	DWY	ProQuest			marie										Invalid username and/or password	
Your University	DWY	SAGE Publications						Customer I	Yes						Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	Springer Verlag			marie			Select Spri	Yes						Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	Swets			1234qe				Yes						Successfully downloaded JR1	Successfully uploaded JR1
Your University	DWY	Wiley-Blackwell							Yes						Successfully downloaded JR1	Successfully uploaded JR1

This report is not available in provider's website
unsuccessful uploads

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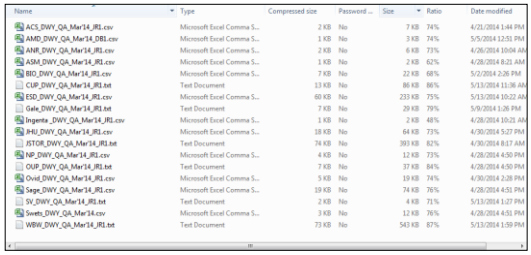
Counter Best Practices

Zipped file of CSV usage data files – SAVE THIS!



Name	Type	Compressed size	Password ...	Size	Ratio	Date modified
ACS_DWY_QA_Mar'14_JR1.csv	Microsoft Excel Comma S...	2 KB	No	7 KB	74%	4/21/2014 1:44 PM
AMD_DWY_QA_Mar'14_DB1.csv	Microsoft Excel Comma S...	1 KB	No	3 KB	74%	5/5/2014 12:51 PM
ANR_DWY_QA_Mar'14_JR1.csv	Microsoft Excel Comma S...	2 KB	No	6 KB	73%	4/26/2014 10:04 AM
ASM_DWY_QA_Mar'14_JR1.csv	Microsoft Excel Comma S...	1 KB	No	2 KB	62%	4/28/2014 8:21 AM
BIO_DWY_QA_Mar'14_JR1.csv	Microsoft Excel Comma S...	7 KB	No	22 KB	68%	5/2/2014 2:26 PM
CUP_DWY_QA_Mar'14_JR1.txt	Text Document	13 KB	No	86 KB	86%	5/13/2014 11:36 AM
ESD_DWY_QA_Mar'14_JR1.csv	Microsoft Excel Comma S...	60 KB	No	233 KB	75%	5/13/2014 10:22 AM
Gale_DWY_QA_Mar'14_JR1.txt	Text Document	7 KB	No	29 KB	79%	5/9/2014 1:26 PM
Ingenta _DWY_QA_Mar'14_JR1.csv	Microsoft Excel Comma S...	1 KB	No	2 KB	48%	4/28/2014 10:21 AM
JHU_DWY_QA_Mar'14_JR1.csv	Microsoft Excel Comma S...	18 KB	No	64 KB	73%	4/30/2014 5:27 PM
JSTOR_DWY_QA_Mar'14_JR1.txt	Text Document	74 KB	No	393 KB	82%	4/30/2014 8:17 AM
NP_DWY_QA_Mar'14_JR1.csv	Microsoft Excel Comma S...	4 KB	No	12 KB	73%	4/28/2014 4:50 PM
OUP_DWY_QA_Mar'14_JR1.txt	Text Document	7 KB	No	37 KB	84%	4/28/2014 4:50 PM
Ovid_DWY_QA_Mar'14_JR1.csv	Microsoft Excel Comma S...	5 KB	No	19 KB	74%	4/30/2014 2:28 PM
Sage_DWY_QA_Mar'14_JR1.csv	Microsoft Excel Comma S...	19 KB	No	74 KB	76%	4/28/2014 4:51 PM
SV_DWY_QA_Mar'14_JR1.txt	Text Document	2 KB	No	4 KB	71%	5/13/2014 1:27 PM
Swets_DWY_QA_Mar'14.csv	Microsoft Excel Comma S...	3 KB	No	12 KB	76%	4/28/2014 4:51 PM
WBW_DWY_QA_Mar'14_JR1.txt	Text Document	73 KB	No	543 KB	87%	5/13/2014 1:39 PM

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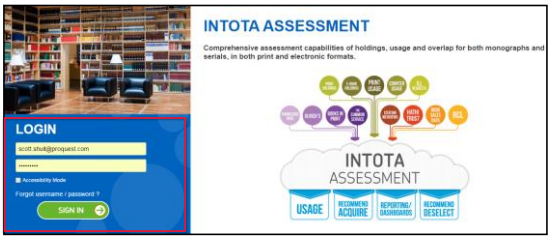
Intota Assessment Login



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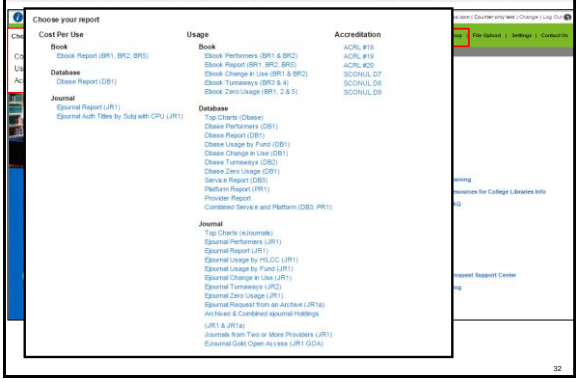
Menu Options



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Cost-Per-Use Reports

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

- 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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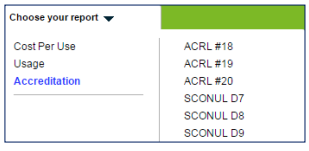
Accreditation Reports



- 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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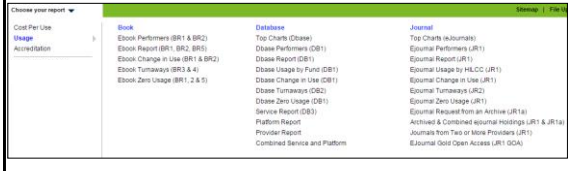
Creating and Manipulating Reports



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

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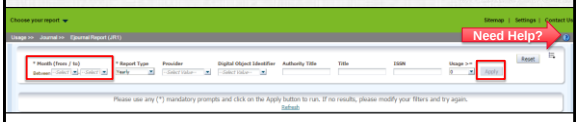
Creating and Manipulating Reports



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

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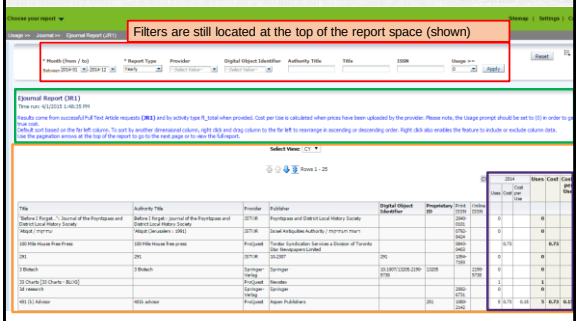
New Report View



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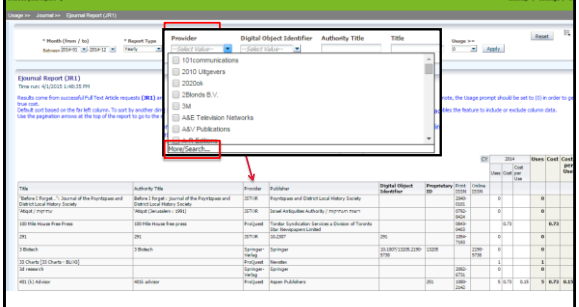
Provider Filter



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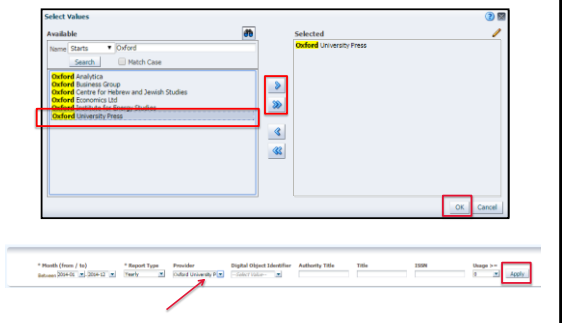
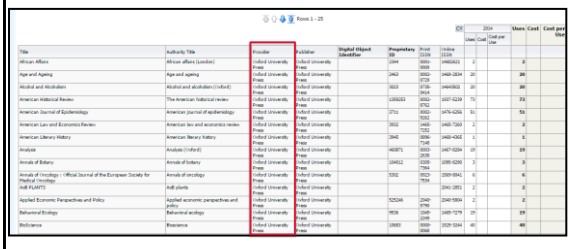
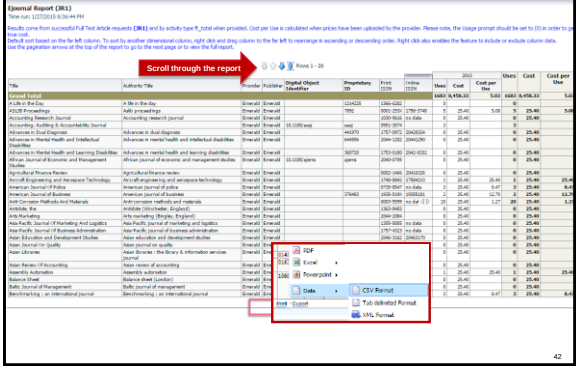
Provider Filter



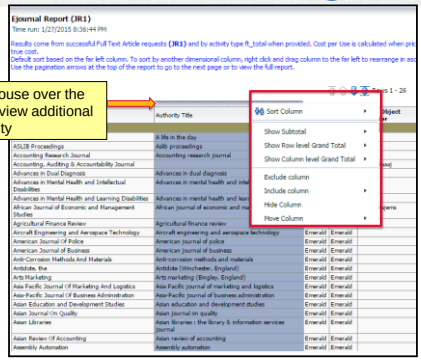
Provider Filter



Creating and Manipulating Reports



Customizing the Report Space



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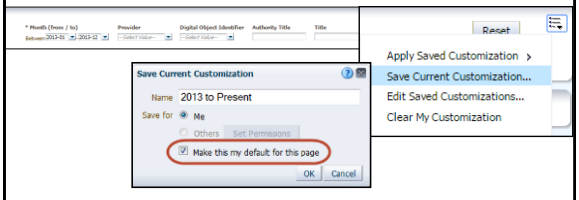
Page Options



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

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THANK YOU!

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