What counts and what doesn't

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

Berne

April 5th, 2011

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Outline

- **Project COUNTER**
  - History and organization
- **Auditing**
- **Comparability**
- **Elsevier**
  - COUNTER and additional reports
- **SUSHI**
- **Elsevier Admin Tool**

Project COUNTER – a history

- 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

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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

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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

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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.

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Code of Practice updates

The following overall <u>objectives</u> 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,

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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

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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

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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

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Which COUNTER reports are provided by Elsevier?

Report code	Report name	Required/ Optional	Elsevier report	SUSHI support
JR1 = Journal Report 1	Number of Successful Full-Text Article Requests by Month and Journal	Required	Yes (ScienceDirect only)	Yes
JR1a = Journal Report 1a	Number of Successful Full-Text Article Requests from an Archive by Month and Journal	Required (option JR1a or JR5)	Yes (ScienceDirect only)	Planned 2011
DB3 = Database Report 3	Total Searches and Sessions by Month and Service	Required	Yes (ScienceDirect and Scopus)	Yes
CR1 = Consortium Report 1	Number of Successful Full-Text Journal Article or Book Chapter Requests by Month (XML only)	Required	Yes (ScienceDirect only)	Planned 2011
BR2 = Books report 2	Number of Successful Section Requests by Month and Title	Required	Yes (ScienceDirect only)	Planned 2011

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Additional COUNTER reports

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

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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**

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Elsevier and SUSHI

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SUSHI

- **S**tandardised **U**sage **H**arvesting **I**nitiative

- 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

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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

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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)

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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

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SUSHI Pilot Projects

- ScienceDirect and Scopus only

- Reports as per currently available for both platforms as per Usage Reporting Tool

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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

- <u>Access to Usage Reports</u>

- ScienceDirect and Scopus Linking

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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

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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

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Elsevier Admin Tool – How to set up the Account

Contact:

nlinfo@sciencedirect.com

or

nlinfo@scopus.com

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Thank you!

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