

A PRACTICAL GUIDE TO COUNTER RELEASE 5

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A QUICK POLL

How familiar are you with COUNTER Release 5?

1. Start at the beginning! I'm new to this.
2. Very knowledgeable! I got this.
3. Anywhere in between.

A PRACTICAL GUIDE

- Release 5: The newest version of the COUNTER Code of Practice
- Learning new metrics and report options
- How does usage compare from COUNTER 4 to COUNTER 5?
- Finding usage trends

WHAT DO WE NEED TO KNOW?



COUNTER 5 Metrics



COUNTER 5 Reports



Release 4 and Release 5 Comparison



Which reports to use for the data you need

WHY ARE METRICS IMPORTANT?

- Metrics represent user activities and behaviors
- They tell us how, and how much, users are engaging with resources
- Measurements of user activities inform our decisions for collection development
- They provide justification for acquisitions, cancellations, and budget decisions

RELEASE 5 METRICS – WHAT IS NEW?



INVESTIGATIONS



REQUESTS

COMPARISON WITH RELEASE 4

RELEASE 5

- **Investigation** – Action by a user in relation to a content item or information about a content item (view abstract, link to link resolver, view cited references, link to ILL form, view article preview)
 - **Request** – Action by a user to download or view the full text of a content item (HTML, PDF, video). Requests are ALSO investigations.
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RELEASE 4

- **Result Click** – A click originating from a set of search results.
- **Record View** – A view of the detailed metadata (abstract views, not full text)

INVESTIGATIONS

Total Item Investigations

Total number of times a content item or information related to a content item was investigated by a user

Unique Item Investigations

Number of unique content items investigated by a user
(e.g., chapters)

Unique Title Investigations

Number of unique titles investigated by a user (book titles)

REQUESTS

Total Item Requests

Total number of times the full text of a content item was downloaded or viewed

Unique Item Requests

Number of unique content items requested by a user (e.g., chapters)

Unique Title Requests

Number of unique titles requested by a user (book titles)

SCENARIO 1

A user searches a full-text database. In the results list, the user views two abstracts. On the second abstract, the user clicks the option to view full-text.

Counts:

Two abstracts = 2 Item Investigations

Full-text article = 1 Item Request and 1 Item Investigation

Total = 3 Total Item Investigations, 2 Unique Item Investigations, 1 Total Item Request

OTHER RELEASE 5 METRICS

SEARCHES

Searches Regular

Searches Automated

Searches Platform

Searches Federated

ACCESS DENIALS

No License

License Exceeded

SCENARIO 2

A user visits my library's website and selects a specific database from the list of available resources. When the database opens, the user enters a search and views the result list. The user reads abstracts for the first five results and downloads full text for two of them.

COUNTS:

Database Search = 1 Searches Regular

Abstract Views = 5 Item Investigations

Full-Text Downloads = 2 Item Requests and 2 Item Investigations

Totals = 1 Searches Regular, 7 Total Item Investigations, 5 Unique Item Investigations,
2 Total Item Requests

PUTTING IT ALL TOGETHER

Investigations – Total Item Investigations, Unique Item Investigations, Unique Title Investigations

Requests – Total Item Requests, Unique Item Requests, Unique Title Requests

Searches – Searches Regular, Searches Automated, Searches Platform, Searches Federated

Access Denials – No License, License Exceeded

ASSESSING USAGE WHEN METRICS CHANGE

Comparing usage from year to year when the metrics change and measure different activities

- Cost per use can be calculated regardless of the metric
- It is not possible to directly compare usage to previous releases, but there is an observable trend

Tip:

Establish a cost per use threshold for low usage and calculate cost per use. This is still possible even when metrics change. Assessment will require a deeper look at the data, but this is a way to observe usage trends when a true comparison (same metrics, same reports) is not possible.

TAKEAWAYS ON METRICS

Total Item Requests

- Important for databases that have full-text content
- Reports the number of full-text downloads or views

Total Item Investigations

- Provides a big picture perspective of the total number of investigations

Unique Investigations and Requests

- Powerful metrics for identifying activities with unique items and titles
- Most accurate for cost per use analysis

RELEASE 5 REPORTS

Master Reports

- The most complete reports
- Can be filtered to show specific data
- Options for filtering include Year of Publication, Data Type, Access Type, Access Method, and Metric Type

Standard View Reports

- Provide summaries of specific data contained in Master Reports
- Some correspond to Release 4 reports, allowing comparison of previous and current usage data

MASTER REPORTS



PLATFORM
MASTER REPORT



DATABASE
MASTER REPORT



TITLE MASTER
REPORT



ITEM MASTER
REPORT

PLATFORM MASTER REPORT

Reports activity for the entire platform

Required by all publishers and vendors

Metric_Type	Reporting_Period_Total
Searches_Platform	236639
Total_Item_Investigations	328874
Total_Item_Requests	120484
Unique_Item_Investigations	206250
Unique_Item_Requests	88601
Unique_Title_Investigations	2166
Unique_Title_Requests	881

DATABASE MASTER REPORT

Reports user activity for all metrics in databases

2 Standard View Reports

- DR_D1 Database Search and Item Usage
- DR_D2 Database Access Denied

Metric_Type	Reporting_Period_Total
Searches_Regular	65558
Total_Item_Investigations	11475
Total_Item_Requests	4591
Unique_Item_Investigations	6970
Unique_Item_Requests	3309
Searches_Automated	240
Unique_Title_Investigations	31
Unique_Title_Requests	6

TITLE MASTER REPORT

Reports activity for titles of
books or journals

7 Standard View Reports

Accounting Education	Total_Item_Investigations	68
Accounting Education	Total_Item_Requests	33
Accounting Education	Unique_Item_Investigations	39
Accounting Education	Unique_Item_Requests	22

TITLE MASTER REPORT — STANDARD VIEWS

BOOKS

TR_B1 Book Requests

TR_B2 Book Access Denied

TR_B3 Book Usage by Access Type

JOURNALS

TR_J1 Journal Requests (excluding OA Gold)

TR_J2 Journal Access Denied

TR_J3 Journal Usage by Access Type

TR_J4 Journal Requests by Year of
Publication

ITEM MASTER REPORT

Shows usage for single items, such as articles and videos

Two Standard View Reports

- IR_A1 Journal Article Requests
- IR_M1 Multimedia Item Requests

Tip:

Consult vendor documentation to understand reporting of data for specific reports.

Example:

JSTOR's Item Master Report: *"A customizable report that offers usage of images on JSTOR. Usage is shown at the individual image level."*

MANAGING REPORTS

- Think about the data that you need on a regular basis
- Some vendors and publishers provide every COUNTER report
- Find the relevant reports and focus on those rather than every report provided
- You might need to consult some reports only periodically
- Check support documentation from vendors and publishers to find their specific guidance for interpreting COUNTER reports

REPORTS BY FORMAT

BOOKS
JOURNALS
DATABASES

BOOKS

Title Master Report

- TR_B1 Book Requests
- TR_B2 Book Access Denied
- TR_B3 Book Usage by Access Type

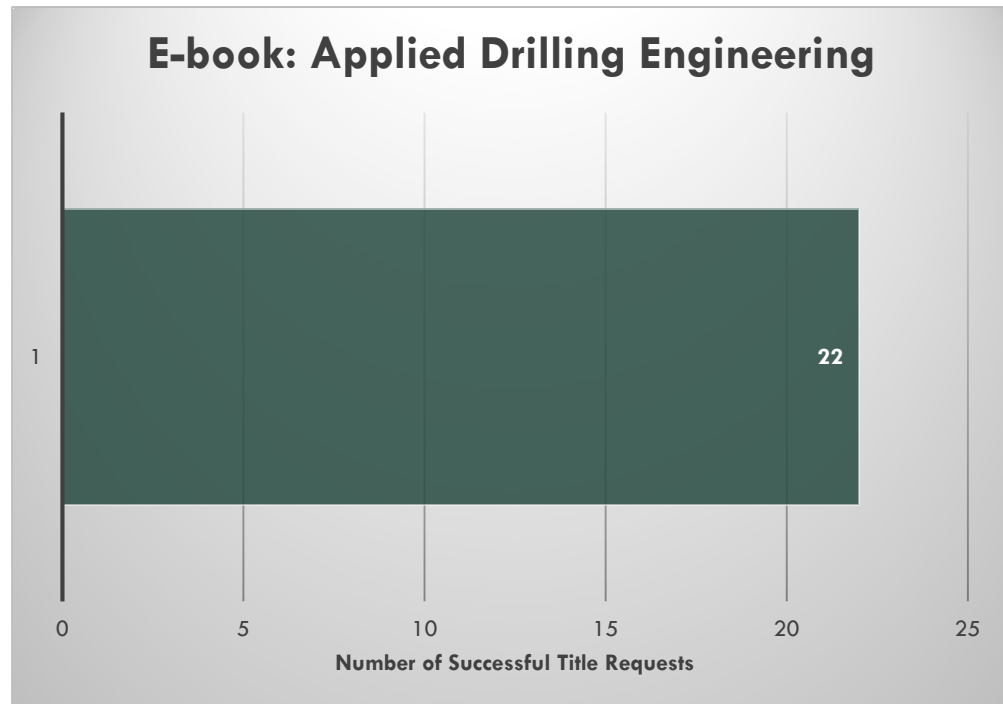
Ebooks can be delivered differently by platform: in chapters, as complete books, or both.

Use Unique Title Request to identify the number of times an ebook was accessed in a single user session.

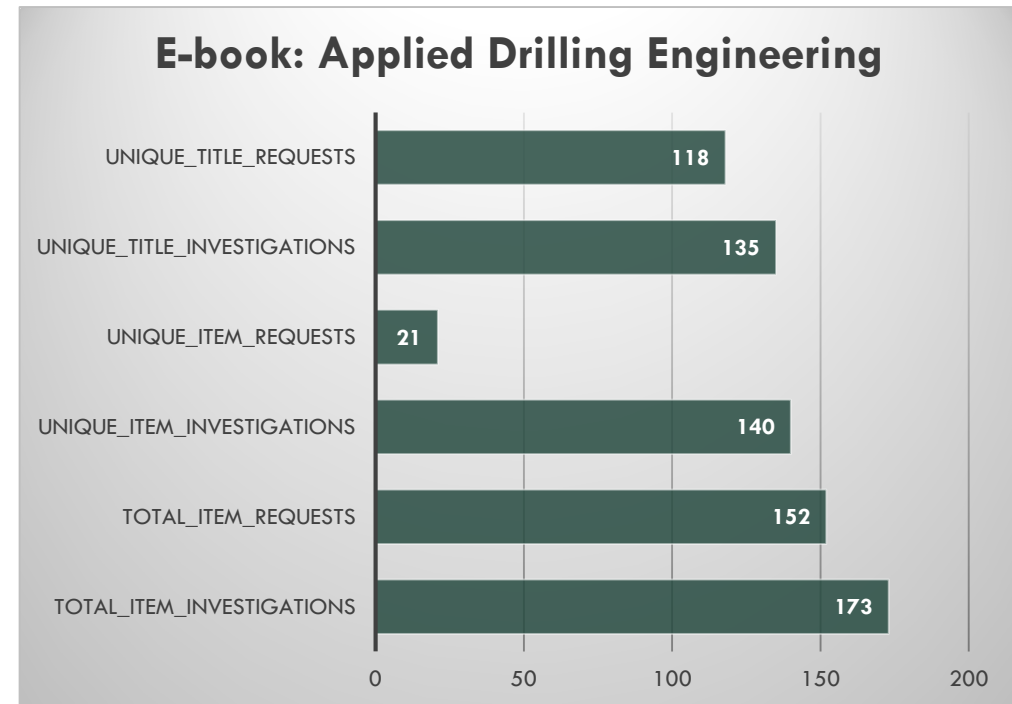
Nutrition and Diet Therapy	Total_Item_Requests	48
Nutrition and Diet Therapy	Unique_Title_Requests	2

E-BOOK USAGE

RELEASE 4 – Book Report 1



RELEASE 5 – Title Master Report



JOURNALS

Title Master Report

- TR_J1 Journal Requests (excluding OA Gold)
- TR_J2 Journal Access Denied
- TR_J3 Journal Usage by Access Type
- TR_J4 Journal Requests by Year of Publication

Notable Changes from COUNTER Release 4:

- Open Access Gold titles are excluded in Journal Requests
- Reports no longer provide counts for PDF Full Text and HTML Full Text
- Two metrics are provided – Total Item Investigations and Total Item Requests

CALCULATING COST PER USE

Calculating Cost Per Use:

Cost of Journal / Number of Unique Item Requests = Cost Per Unique Item Request

\$1,200 / 868 = \$1.39 per item request

DATABASES

Database Master Report

- DR_D1 Database Search and Item Usage
- DR_D2 Database Access Denied

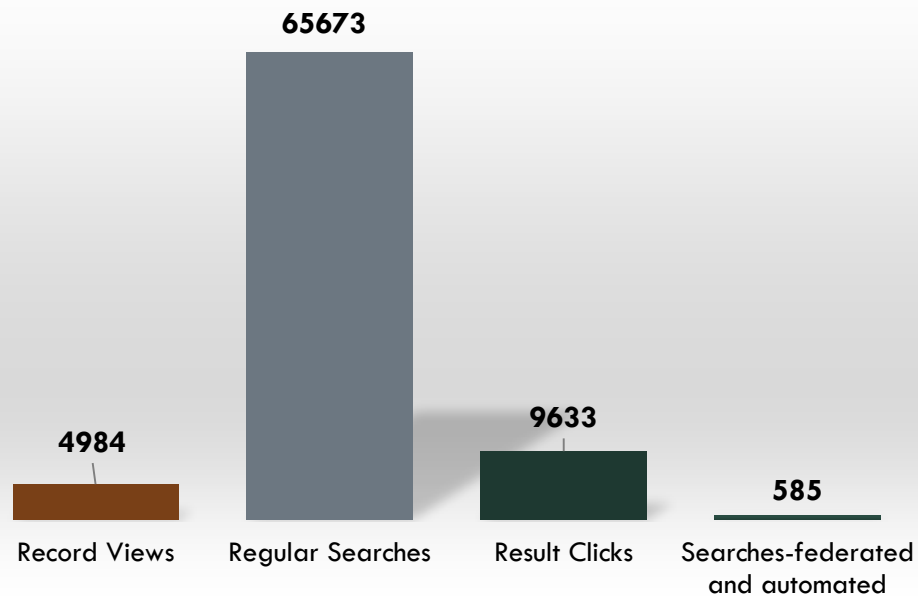
Tip:

Database Search and Item Usage most closely corresponds with Database Report 1 from COUNTER 4.

DATABASE REPORT COMPARISON

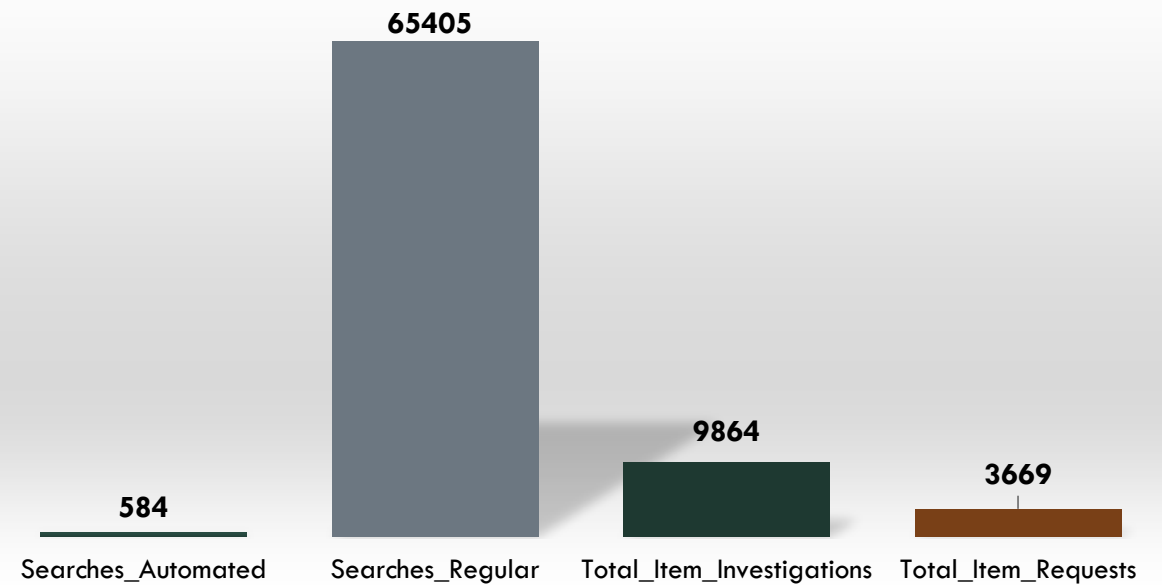
RELEASE 4

Database Report 1



RELEASE 5

Database Search and Item Usage



WHERE CAN I FIND...?

1. Where can I find usage for books? I previously used COUNTER 4 Book Report 1.
➔ TR_B1 Book Requests
2. Where can I find journal usage? I previously used COUNTER 4 Journal Report 1.
➔ TR_J1 Journal Requests Excluding OA Gold
3. Where can I find journal access denied? I previously used Title Report 2.
➔ TR_J2 Journal Access Denied
4. Where can I find database turnaways? I previously used Database Report 2.
➔ DR_D2 Database Access Denied
5. Where can I find reports on mobile usage?
➔ Mobile usage is no longer reported in COUNTER Release 5.

REPORT RELATIONSHIPS

RELEASE 4

1. BR2 Book Report 2
2. BR3 Book Report 3
3. DB1 Database Report 1
4. DB2 Database Report 2
5. JR1 Journal Report 1
6. JR2 Journal Report 2
7. PR1 Platform Report 1



RELEASE 5

1. TR_B1 Book Requests Excluding OA Gold
2. TR_B2 Book Access Denied
3. DR_D1 Database Search and Item Usage
4. DR_D2 Database Access Denied
5. TR_J1 Journal Requests Excluding OA Gold
6. TR_J2 Journal Access Denied
7. PR_P1 Platform Usage

CHALLENGES



Learning new metrics and reports



Finding which COUNTER 5 reports provide the data you need



“Comparing” COUNTER 5 data to COUNTER 4 for assessment



Vendor issues with implementation

OPPORTUNITIES



IMPROVED WAYS TO
REPRESENT USER BEHAVIORS



MORE ROBUST
INFORMATION



SIMPLER REPORTING

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REFERENCES

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https://www.projectcounter.org/wp-content/uploads/2019/05/Release_5_Librarians_20190509-Revised-Edition.pdf

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