Demystifying Usage Statistics

What are COUNTER & SUSHI and how can I use them successfully?

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EBSCO Information Services
opesch@ebsco.com
Overview

• History of COUNTER & SUSHI
• The reports and what they are used for
• Best practices surrounding SUSHI
• Looking ahead
Started as a collaborative effort between publishers, librarians and aggregators to provide consistent, comparable and credible usage statistics
Brief history of COUNTER and SUSHI

Initial Release focused on Journals and Databases
Brief history of COUNTER and SUSHI

Standardized Usage Statistics Harvesting Initiative (SUSHI) formed to solve the problem of loading a growing number of usage reports into ERM's
Brief history of COUNTER and SUSHI

Release 2 of the COUNTER Code of Practice released with minor improvements over the initial release.
Brief history of COUNTER and SUSHI

COUNTER initiative launched

- 2002
- 2003
- 2004
- 2005
- 2006

SUSHI initiative launched

- 2002

COUNTER
- Release 1
  Journals & Databases

- 2003

COUNTER
- Release 2
  Journals & Databases

- 2004

COUNTER
- Release 1
  Books

- 2005

COUNTER
- Release 3
  Journals & Databases

- 2006

COUNTER
- Release 4
  Journals & Databases

SUSHI

- 2002

SUSHI Draft Standard Released

- 2003

SUSHI Draft Standard Revised as Z39.93-2007

- 2004

SUSHI Draft Standard Revised as Z39.93-2012

- 2005

SUSHI Draft Standard Revised as Z39.93-2014

- 2006

COUNTER SUSHI Implementation Profile Published

- 2007

COUNTER SUSHI Implementation Profile updated

- 2008

Code of Practice for books releases.

SUSHI released as a draft standard for trial use.
Brief history of COUNTER and SUSHI

COUNTER initiative launched

- 2002
- Release 1 Journals & Databases

COUNTER initiative launched

- 2004
- Release 2 Journals & Databases

COUNTER initiative launched

- 2005
- Release 1 Books

COUNTER initiative launched

- 2006
- Release 2 Journals & Databases

COUNTER initiative launched

- 2007
- Release 3 Books

SUSHI initiative launched

- 2002
- SUSHI Draft Standard Released

SUSHI Draft Standard Released

- 2005
- SUSHI Draft Standard Revised as Z39.93-2007

SUSHI Draft Standard Revised as Z39.93-2007

- 2007
- SUSHI released as a NISO standard (Z39.93)

SUSHI released as a NISO standard (Z39.93)
Brief history of COUNTER and SUSHI

- COUNTER initiative launched in 2002
- Release 1 for Journals & Databases in 2003
- Release 2 for Journals & Databases in 2005
- Release 3 for Journals & Databases in 2007
- Release 4 for Journals & Databases

- SUSHI initiative launched in 2004
- SUSHI Draft Standard Released in 2006
- SUSHI Standard Released as Z39.93-2007
- SUSHI Draft Standard Revised as Z39.93-2012
- SUSHI Draft Standard Revised as Z39.93-2014

COUNTER Code of Practice for Journals and Databases updated in 2008
Brief history of COUNTER and SUSHI

COUNTER initiative launched
- 2002
- Release 1 Journals & Databases
- Release 2 Journals & Databases
- Release 3 Journals & Databases
- Release 4 Journals & Databases
- Books

SUSHI initiative launched
- 2003
- SUSHI Draft Standard Released
- SUSHI Standard Released as Z39.93-2007
- SUSHI Draft Standard Revised as Z39.93-2012

COUNTER-SUSHI Implementation Profile published.
- 2011

SUSHI standard revised.
- 2012
Brief history of COUNTER and SUSHI

COUNTER initiative launched: 2002
- Release 1: Journals & Databases
- Release 2: Journals & Databases
- Release 3: Journals & Databases
- Release 4: Journals, Databases and Books

SUSHI initiative launched: 2004
- SUSHI Draft Standard Released: 2004
- SUSHI Standard Released: 2007
- SUSHI Implementation Profile Published: 2016

COUNTER Release 4 combines journals, databases and books
Brief history of COUNTER and SUSHI

COUNTER initiative launched
Release 1 Journals & Databases
Release 2 Journals & Databases
Release 3 Journals & Databases
Release 4 Journals, Databases and Books
Community Website launched

SUSHI initiative launched
SUSHI Draft Standard Released
SUSHI Standard Released as Z39.93-2007
SUSHI Standard Revised as Z39.93-2012
SUSHI Standard Revised as Z39.93-2014

COUNTER SUSHI Implementation Profile Published
COUNTER SUSHI Implementation Profile updated

Timeline:
- 2002: COUNTER initiative launched
- 2003: SUSHI initiative launched
- 2004: SUSHI Draft Standard Released
- 2006: COUNTER Release 1 Journals & Databases
- 2007: COUNTER Release 2 Journals & Databases
- 2008: COUNTER Release 3 Journals & Databases
- 2009: Release 1 Books
- 2010: COUNTER Release 4 Journals, Databases and Books
- 2011: SUSHI Standard Revised as Z39.93-2012
- 2012: SUSHI Standard Revised as Z39.93-2014
- 2013: COUNTER SUSHI Implementation Profile Published
- 2014: COUNTER SUSHI Implementation Profile updated
- 2015
- 2016
Key definition
Platform

COUNTER reports provide usage statistics for the journals, books, databases and multimedia collections accessed on the Platform.

The Platform is the host or site where that content is accessed.

Examples include ScienceDirect, EBSCOhost, Taylor & Francis, etc.
The Reports
## Standard Reports

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Report Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Book Report 1</td>
<td>Number of Successful Title Requests by Month and Title</td>
</tr>
<tr>
<td>Book Report 2</td>
<td>Number of Successful Section Requests by Month and Title</td>
</tr>
<tr>
<td>Book Report 3</td>
<td>Access Denied to Content Items by Month, Title and Category</td>
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<tr>
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<td>Access Denied to Content items by Month, Platform and Category</td>
</tr>
<tr>
<td>Book Report 5</td>
<td>Total Searches by Month and Title</td>
</tr>
<tr>
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<tr>
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<tr>
<td>Journal Report 5</td>
<td>Number of Successful Full-Text Article Requests by Year-of-Publication (YOP) and Journal</td>
</tr>
<tr>
<td>Multimedia Report 1</td>
<td>Number of Successful Full Multimedia Content Unit Requests by Month and Collection</td>
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<td>Total Searches, Result Clicks and Record Views by Month and Platform</td>
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</table>

### 3 reports to know:

- Book Report 2: Number of Successful Section Requests by Month and Title
- Database Report 2: Access Denied by Month, Database and Category
- Journal Report 5: Number of Successful Full-Text Article Requests by Year-of-Publication (YOP) and Journal

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EBSCO INFORMATION SERVICES
## Standard Reports

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**3 reports to know**

- Journal Report 1
- Database Report 1
- Platform Report 1
### Journal Report 1

**Number of successful full text requests by month and journal**

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<tr>
<th>Journal</th>
<th>Publisher</th>
<th>Platform</th>
<th>Journal DOI</th>
<th>Proprietary Identifier</th>
<th>Print ISSN</th>
<th>Online ISSN</th>
<th>Reporting Period Total</th>
<th>Reporting Period HTML</th>
<th>Reporting Period PDF</th>
<th>Jan-2015</th>
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</table>
What is counted?

Full Text Requests

HTML Requests

PDF Requests
Journal Report 1

What is counted?

All usage for the journal on the platform...

Subscribed
In an Archive
Pay-per-view
Gold Open Access
Identifiers provide match-points!

<table>
<thead>
<tr>
<th>Journal DOI</th>
<th>Proprietary Identifiers</th>
<th>Print ISSN</th>
<th>Online ISSN</th>
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<tbody>
<tr>
<td>EBSOCoop</td>
<td>EBSOCoop</td>
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<td>789-012</td>
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<tr>
<td>EBSOCoop</td>
<td>EBSOCoop</td>
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</tr>
</tbody>
</table>

Identifiers included
Journal Report 1

How is it used?

Cost-Per-Use = \frac{\text{Cost of journal}}{\text{Full text Requests}}

Package Analysis
(cost/use)

Package management
(drops & swaps)
# Database Report 1

<table>
<thead>
<tr>
<th></th>
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<td>EBSCOHost</td>
<td>Regular Searches</td>
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<td>7,034</td>
<td>6,999</td>
<td>8,180</td>
<td>8,701</td>
<td>10,395</td>
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<tr>
<td>Business Source Complete</td>
<td>EBSCO</td>
<td>EBSCOHost</td>
<td>Searches-federated</td>
<td>271,847</td>
<td>25,047</td>
<td>22,846</td>
<td>23,290</td>
<td>20,234</td>
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<tr>
<td>Business Source Complete</td>
<td>EBSCO</td>
<td>EBSCOHost</td>
<td>Result Clicks</td>
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<td>20,432</td>
<td>18,009</td>
<td>16,920</td>
<td>17,790</td>
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<tr>
<td>Business Source Complete</td>
<td>EBSCO</td>
<td>EBSCOHost</td>
<td>Record Views</td>
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<td>9,689</td>
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<td>EBSCOHost</td>
<td>Regular Searches</td>
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**Total Searches, Result Clicks and Record Views by month and database**
# Database Report 1

**What is counted?**

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<tr>
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<td>22</td>
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**Full Text and A&I databases**

- Searches - Regular
- Searches – Federated & Automated
- Result-Clicks
- Record-Views
Database Report 1

How is it used?

Full Text and A&I databases

Cost-Per-Use = \frac{\text{Cost of database}}{\text{Result-Clicks}}

Trends
### Platform Report 1

Total Searches, Result Clicks and Record Views by month and platform

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>EBSCOhost</td>
<td>EBSCO</td>
<td>Regular Searches</td>
<td>369,324</td>
<td>32,620</td>
<td>30,075</td>
<td>31,636</td>
<td>29,442</td>
<td>32,490</td>
<td>33,571</td>
</tr>
<tr>
<td>EBSCOhost</td>
<td>EBSCO</td>
<td>Searches-federated a</td>
<td>567</td>
<td>229</td>
<td>62</td>
<td>97</td>
<td>12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EBSCOhost</td>
<td>EBSCO</td>
<td>Result Clicks</td>
<td>412,301</td>
<td>38,464</td>
<td>33,293</td>
<td>33,275</td>
<td>33,495</td>
<td>36,107</td>
<td>41,616</td>
</tr>
<tr>
<td>EBSCOhost</td>
<td>EBSCO</td>
<td>Record Views</td>
<td>244,234</td>
<td>23,586</td>
<td>19,160</td>
<td>18,966</td>
<td>19,818</td>
<td>20,527</td>
<td>24,708</td>
</tr>
</tbody>
</table>
Overall Stats for the platform/host site

Searches - Regular Searches – Federated & Automated Result-Clicks Record-Views

What is counted?
<table>
<thead>
<tr>
<th>Database</th>
<th>Publisher Platform</th>
<th>User Activity</th>
<th>Total Searches</th>
<th>Record Clicks</th>
<th>Record Views</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Source Complete</td>
<td>EBSCO</td>
<td>Regular Searches</td>
<td>94052</td>
<td>7034</td>
<td>8190</td>
</tr>
<tr>
<td>Business Source Complete</td>
<td>EBSCO</td>
<td>Searches-Federated</td>
<td>27347</td>
<td>25447</td>
<td>25649</td>
</tr>
<tr>
<td>Business Source Complete</td>
<td>EBSCO</td>
<td>Result Clicks</td>
<td>2125090</td>
<td>20432</td>
<td>18089</td>
</tr>
<tr>
<td>Business Source Complete</td>
<td>EBSCO</td>
<td>Record Views</td>
<td>1159212</td>
<td>11753</td>
<td>9689</td>
</tr>
<tr>
<td>CogPrints</td>
<td>EBSCO</td>
<td>Regular Searches</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>CogPrints</td>
<td>EBSCO</td>
<td>Searches-Federated</td>
<td>256404</td>
<td>25162</td>
<td>21649</td>
</tr>
<tr>
<td>CogPrints</td>
<td>EBSCO</td>
<td>Result Clicks</td>
<td>30</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>CogPrints</td>
<td>EBSCO</td>
<td>Record Views</td>
<td>28</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Directory of Open Access Journals</td>
<td>EBSCO</td>
<td>Regular Searches</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Directory of Open Access Journals</td>
<td>EBSCO</td>
<td>Searches-Federated</td>
<td>256617</td>
<td>25605</td>
<td>21685</td>
</tr>
<tr>
<td>Directory of Open Access Journals</td>
<td>EBSCO</td>
<td>Result Clicks</td>
<td>339</td>
<td>46</td>
<td>57</td>
</tr>
<tr>
<td>Directory of Open Access Journals</td>
<td>EBSCO</td>
<td>Record Views</td>
<td>323</td>
<td>29</td>
<td>31</td>
</tr>
</tbody>
</table>

**How is it used?**

Provide “search” counts for Surveys.

**Trends**

![Graph showing trends in search clicks over time.](image)
Standardized Usage Statistics Harvesting Initiative (SUSHI)...

Describes a method by which an ERM, a usage consolidation service or other computer program can automatically request and harvest COUNTER usage reports.
Standardized Usage Statistics Harvesting Initiative (SUSHI)...

Requires a SUSHI client...
SUSHI Client Configuration: The basics
SUSHI Configuration Basics

When a SUSHI client requests a report it needs to know:
• The URL of the SUSHI Server

And it needs to tell the server:
• Who is making the request
• Which institution’s usage to return
• What report it wants
• For what date range
SUSHI Configuration Basics

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And it needs to tell the server:
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• For what date range
SUSHI Settings

Harvest Automatically Using SUSHI (monthly)

Yes

SUSHI Server URL *

http://sushi4.scholarlyiq.com/SushiService.svc

SUSHI Requestor ID *

231a34a2-67b9-4da3-a907-42f03e8

SUSHI Customer ID *

ssssssss

Save  Cancel
Accessing SUSHI Credentials for MIT Press (Atypon)
The page you requested requires you to log in first. Please enter your username and password in the form below.

**Log in (Registered users):**

- Username: [johnsmith]
- Password: ********

[ ] Remember me
- Log in
- Clear

[Forgotten your password?]
[Institution Login]

**Not Yet Registered?**

**Benefits of Registration Include:**

- A Unique User Profile that will allow you to manage your current subscriptions (including online access)
- The ability to create favorites lists down to the article level
- The ability to customize email alerts to receive specific notifications about the topics you care most about and special offers

[Register Now]
Profile

The Profile section is an area for you to administer your personal account or to link to the institutional administration pages. In this section, you can view your favorite and subscribed content, gain online access, sign up for email alerts, and update your registration information.

SAMPLE UNIVERSITY (12345)

You are managing SAMPLE UNIVERSITY (12345).

COUNTER Reports

According to the Project’s website, “COUNTER (Counting Online Usage of Networked Electronic Resources) is an international initiative serving librarians, publishers and intermediaries by setting standards that facilitate the recording and reporting of online usage statistics in a consistent, credible and compatible way.” This platform supports Release 3 of the Code of Practice for Journals and Databases and Release 2 of the Code of Practice for Books and Reference Works, which are the most recent Codes of Practice.

Retrieval via SUSHI

According to the standard’s website, “The Standardized Usage Statistics Harvesting Initiative (SUSHI) Protocol standard (ANSI/NISO Z39.93) defines an automated request and response model for the harvesting of electronic resource usage data utilizing a Web services framework.” If your organization operates a SUSHI client, you can use it to retrieve reports from this platform.

- Our SUSHI request URL is: http://www.mitpressjournals.org/api/soap/analytics/SushIService
- Your Requestor ID is: johnsmith
- Your CustomerID/Reference ID is: 12345
Profile

The Profile section is an area for you to administer your personal account or to link to the institutional administration pages. In this section, you can view your favorite and subscribed content, gain online access, sign up for email alerts, and update your registration information.

SAMPLE UNIVERSITY (12345)

Institutional administration

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- Your Customer/Reference ID is: 12345
Profile

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- Your Requestor ID is: johnsmith
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Our SUSHI request URL is: http://www.mitpressjournals.org/api/soap/analytics/SushiService
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Your CustomerReference ID is: 12345
Setting up SUSHI may be challenging, but worth it in the end...

... and things are improving.
Some statistics on SUSHI Harvests*...

Using SUSHI successfully with more than 100 platforms!

* Source: EBSCO Usage Consolidation SUSHI Harvesting Logs
Increasing your chances of success with SUSHI...

• Look for SUSHI configuration options in the publisher’s online reporting system
  – You may have to “activate” your account for SUSHI

• Check the SUSHI Server Registry for instructions

• Contact the publisher’s technical support
  – You may need to register the IP address of your SUSHI client

• Never guess (you have a 100% chance of guessing wrong)!

• Be patient when harvesting usage
  – Usage is often not available until the end of the next month
Looking ahead...
Within the next 12 months....

SUSHI Server Registry is being improved

• It will be integrated with the COUNTER registry of compliant vendors
• Improved search will allow discovery of platform details via a publisher name search
• Proactive registration of platform SUSHI details by Usus team will expand coverage
Within the next 12 months....

COUNTER SUSHI Testing Tool

• Online tool for testing COUNTER reports and SUSHI implementations
• Improve compliance of tabular and SUSHI-harvested reports
• Used by content providers to confirm compliance of their service
• Used by auditors as part of the COUNTER audit
• Used by librarians to verify compliance and report issues to content provider
COUNTER SUSHI Testing Tool (prototype)...

<table>
<thead>
<tr>
<th>Test Name</th>
<th>Expected</th>
<th>Found</th>
<th>PASS/FAIL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check cell A15 for proper report name (case sensitive)</td>
<td>Journal Report 1 (R4)</td>
<td>Journal Report 1 (R4)</td>
<td>Pass</td>
</tr>
<tr>
<td>Check cell A18 for proper report title (case sensitive)</td>
<td>Number of Successful Full-Text Article Requests by Month and Journal</td>
<td>Number of Successful Full-Text Article Requests by Month and Journal</td>
<td>Pass</td>
</tr>
<tr>
<td>Check cell A19 for period covered label (case insensitive)</td>
<td>Period covered by Report</td>
<td>Period covered by Report</td>
<td>Pass</td>
</tr>
<tr>
<td>Check cell A5 for correctly formatted period covered</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check cell A16 for date run label (case insensitive)</td>
<td>Date run</td>
<td>Date run</td>
<td>Pass</td>
</tr>
<tr>
<td>Check cell A37 for content date, date run</td>
<td>2010-02-27</td>
<td>2010-02-27</td>
<td>Pass</td>
</tr>
<tr>
<td>Check cell A36 for the correct label</td>
<td>Journal</td>
<td>Journal</td>
<td>Pass</td>
</tr>
<tr>
<td>Check cell A35 for the correct label</td>
<td>Publisher</td>
<td>Publisher</td>
<td>Pass</td>
</tr>
<tr>
<td>Check cell A34 for the correct label</td>
<td>Platform</td>
<td>Platform</td>
<td>Pass</td>
</tr>
<tr>
<td>Check cell A33 for the correct label</td>
<td>Journal DOI</td>
<td>Journal DOI</td>
<td>Pass</td>
</tr>
<tr>
<td>Check cell A32 for the correct label</td>
<td>Proprietary identifier</td>
<td>Proprietary identifier</td>
<td>Pass</td>
</tr>
<tr>
<td>Check cell A31 for the correct label</td>
<td>Print ISSN</td>
<td>Print ISSN</td>
<td>Pass</td>
</tr>
<tr>
<td>Check cell A30 for the correct label</td>
<td>Online ISSN</td>
<td>Online ISSN</td>
<td>Pass</td>
</tr>
<tr>
<td>Check cell A29 for the correct label</td>
<td>Reporting period total</td>
<td>Reporting period total</td>
<td>Pass</td>
</tr>
<tr>
<td>Check cell A28 for the correct label</td>
<td>Reporting period in HTML</td>
<td>Reporting period in HTML</td>
<td>Pass</td>
</tr>
<tr>
<td>Check cell A27 for the correct label</td>
<td>Reporting period in PDF</td>
<td>Reporting period in PDF</td>
<td>Pass</td>
</tr>
<tr>
<td>Check for correct date headings in cells A17, A18</td>
<td>Jan-2010</td>
<td>Jan-2010</td>
<td>Pass</td>
</tr>
<tr>
<td>Check for correct date headings in cells A31, A32</td>
<td>Dec-2010</td>
<td>Dec-2010</td>
<td>Pass</td>
</tr>
<tr>
<td>Check that cells A13, A14, A15 have a total for all journals (case insensitive)</td>
<td>Total for all journals</td>
<td>Total for all journals</td>
<td>Pass</td>
</tr>
<tr>
<td>Check that cell A36 contains proper platform name</td>
<td>EBSCOhost</td>
<td>EBSCOhost</td>
<td>Pass</td>
</tr>
<tr>
<td>Check that cell A37 is not blank</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check the cell A10 to make sure it is a date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check all cells in column A for valid Print ISSN</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### COUNTER Report Analysis Error Log

File analyzed: EBSCO_COUNTER(R4)JournalReport1_s1020214_Feb272016.xlsx

Report Type: Journal Report 1 (R4)

<table>
<thead>
<tr>
<th>Test Failed</th>
<th>Level of Error</th>
<th>Cell</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check for valid Print ISSNs in cells F9:F3562</td>
<td>Fail</td>
<td>F10</td>
<td>'N/A' No dash in 5th position; Invalid length (expect 8 plus dash);</td>
</tr>
<tr>
<td>Check for valid Print ISSNs in cells F9:F3562</td>
<td>Warning</td>
<td>F61</td>
<td>'1690-7537' Invalid check-digit</td>
</tr>
<tr>
<td>Check for valid Print ISSNs in cells F9:F3562</td>
<td>Warning</td>
<td>F1385</td>
<td>'1943-1660' Invalid check-digit</td>
</tr>
<tr>
<td>Check for valid Print ISSNs in cells F9:F3562</td>
<td>Warning</td>
<td>F1691</td>
<td>'9210-1737' Invalid check-digit</td>
</tr>
<tr>
<td>Check for valid Print ISSNs in cells F9:F3562</td>
<td>Warning</td>
<td>F2295</td>
<td>'1756-9538' Invalid check-digit</td>
</tr>
</tbody>
</table>

(end of log entries)
Coming in 2018....

Release 5 of the COUNTER Code of Practice

• Fix some metric types that need it
• Consistency between reports
• Consistency between formats
• Clarity in definitions and processing
• Simplify where possible
References....

- Usus website: http://usus.org.uk
- COUNTER website: http://www.projectcounter.org
- NISO SUSHI website: http://www.niso.org/workrooms/sushi
- SUSHI Server Registry: http://www.niso.org/workrooms/sushi/registry_server/
- Implementing SUSHI at your institution: http://www.vivalib.org/usus/SUSHI/SUSHITraining.pdf
Thank you

Oliver Pesch
opesch@ebsco.com