Philosophy Documentation Center (PDC) COUNTER 5 Portal Overview

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1) About COUNTER Release 5

Release 5 of the COUNTER Code of Practice is designed to balance changing reporting needs with the need to make things simpler, so that all content providers can achieve compliance and librarians can have usage statistics that are credible, consistent and comparable. For more information, please refer to the full Code of Practice.

There are several different types of usage metric in Release 5, which breakdown into investigations and requests.

An investigation is tracked when a user performs any action in relation to a content item or title, while a request is specifically related to viewing or downloading the full content item (see Figure 1).

  a. Metrics

Investigations

- ‘Total_Item_Investigations’: the total number of times a content item or information related to a content item was accessed.
- ‘Unique_Item_Investigations’: the number of unique content items (e.g. chapters) investigated by a user.
- ‘Unique_Title_Investigations’: the number of unique titles (e.g. books) investigated by a user.

Requests

- ‘Total_Item_Requests’: the total number of times the full text of a content item was downloaded or viewed.
- ‘Unique_Item_Requests’: the number of unique content items (e.g. chapters) requested by a user.
- ‘Unique_Title_Requests’: the number of unique titles (e.g. books) requested by a user.

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1 About COUNTER Release 5 content sourced from The Friendly Guide to Release 5 for Librarians, Tasha Mellins-Cohen, (Project COUNTER, 2018)
Access Denials

Access denials are sometimes known as turnaways. Two varieties of access denial metric are tracked in Release 5:

- ‘No_License’: counted when a user is unable to access a unique content item because their institution does not have a license to the content.
- ‘Limit_Exceeded’: counted when a user is unable to access a unique content item because their institution’s cap on the number of simultaneous users has been exceeded.

Searches

There are four different types of search metric in Release 5:

- ‘Searches_Regular’: the number of times a user searches a database, when they have actively chosen that database from a list of options OR there is only one database available to search.
- ‘Searches_Automated’: the number of times a user searches a database, when they have not actively chosen that database from a list of options. That is, Searches_Automated is recorded when the platform offers a search across multiple databases by default, and the user has not elected to limit their search to a subset of those databases.
- ‘Searches_Platform’: the number of times a user searches a database, regardless of the number of databases involved in the search.
- ‘Searches_Federated’: the number of times a search is run remotely by a computer.

b. Attributes and Parameters

Release 5 of the COUNTER Code of Practice has added a series of elements and attributes to our longer-standing metrics. These help to provide much more granular information in an organized way, as well as letting the COUNTER team maintain and amend the Code of Practice over time.

Briefly, the new elements are:

- ‘Data_Type’: used to group content at the level of the Title.
- ‘Section_Type’: used when Data_Types are delivered in small sub-units (e.g. journal articles).
- ‘Access_Type’: used to determine whether content was Open Access or not.
- ‘Access_Method’: applies when a Host allows Text and Data Mining (TDM) of their content, and is able to distinguish TDM activity from all other activity.
- ‘YOP’: Year of Publication, the four-digit year in which the Version of Record was published.

For full details please see the Code of Practice.
c. COUNTER 5 reports

Release 5 of the COUNTER Code of Practice includes four Master Reports covering a very wide spectrum of activities:

- Platform Master Report
- Database Master Report
- Title Master Report
- Item Master Report

For ease of use, each of the Master Reports is associated with one or more summaries of particular types of activity, such as usage or access denials, called Standard Views. You can filter a Master Report to show a Standard View (or a custom view to suit your needs) using standard spreadsheet tools. Standard Views only hold a subset of the information from a Master Report, not the complete data set, so it is not possible to ‘unfilter’ a Standard View to obtain its parent Master Report.

2) Logging in

Go to [insert PDC specific URL] and enter username and password provided.

3) Navigating within the portal

The PDC COUNTER 5 portal provided by Scholarly iQ (www.scholarlyiq.com) is designed to be as user-friendly and intuitive as possible whilst being compliant to the latest standards.
Once logged in you will be presented the following page with an Executive Dashboard to visualise key usage criteria.

**Sample dashboard**

The primary features of the reporting interface include:

1) **Report Toolbar** - the toolbar contains buttons allowing you to expand/collapse sidebars, change options, link to help and perform actions on your account such as SUSHI registration.
   a. Home – click the Home button to return to the main page of the application
   b. Report Sidebar – click the Report Sidebar to expand or collapse the left sidebar
   c. Options – click the Options button to customise your preferences such as Rows Per Page and Chart Engine
   d. Discovery Panel - click the Discovery Panel button to expand or collapse the right sidebar. The Discovery Panel allows you to add and remove filters, attributes, and metrics when a report is displayed
   e. Report Designer - click the Report Designer button to change report parameters when a report is displayed
   f. Help – click the Help button to link to support and help materials

2) **Calendar** – the calendar control allows you to apply date ranges to the active dashboard or report

3) **Available Reports** – this area lists the reports that are enabled for your account. Reports are grouped by category and clicking a report will display it with the active date range

4) **Help Widget** – the Help Widget can be selected from Help in the Report Toolbar or under Account Name to guide you through reporting steps and using the portal

5) **Dashboard and Report Screen** – displays the requested reports, data tables and charts

6) **Customer Name** – displays Customer Name and includes dropdown to links for Select Account, Help, SUSHI, Version and Sign Out

When a report is requested the following additional options are presented to the user:
Sample report

The additional features displayed within a report include:

1) Report configuration – allows you to select/deselect report attributes and metrics (R5 only)

2) Report details – displays requested report table

3) Report navigation – allows you to navigate through report table and change number of rows displayed

4) Date – displays date range of active report

5) Search – allows you to search for specific line items such as ‘American National Biography’

6) Export – allows you to export data in report to CSV

4) Report selection

PDC customer usage reports are available in Dashboards, COUNTER Master, COUNTER Standard, COUNTER R4 and PDC Reports in the left hand sidebar.

- Dashboards contain single page overviews of report data
- COUNTER Master reports can be dynamically filtered and changed
- COUNTER Standard reports are pre-configured and cannot be dynamically changed
Clicking on a report will display it with the active date range.

5) Calendar selection

Selection of date ranges from the Calendar control will apply the requested date range to the active dashboard or report.

[Images of Calendar controls showing different date ranges]

6) Running a COUNTER 5 Master Report

COUNTER Master reports selected from Available Reports are designed to be able to show all available COUNTER metrics and attributes, and for these to be dynamically filtered and changed.

COUNTER 5 Master Reports can be customized by available attributes and metrics in 3 ways:

a. Report Configuration

The current report configuration is visible at the top of Master Reports. Clicking on an attribute allows you to edit or change which attributes and metrics are displayed in the report.

[Image of report configuration options with selected attributes and metrics]

Selecting available attributes or metrics allows you to add or remove which attributes or metrics are included in your next report.
When all the required attributes and metrics are selected you can generate the report.

b. Discovery Panel

Clicking the Discovery Panel button in the top toolbar expands or collapses the right sidebar. The Discovery Panel allows you to add and remove filters, attributes, and metrics when a report is displayed.
Selecting or drag and dropping attributes and metrics will add them to the selected Master report.

Clicking on a selected attribute or metric within the report configuration will remove the selected attribute or metric from the report.
c. **Report Designer**

The report designer also allows you to change report parameters when a report is displayed by opening a Report Description.

The Report Description can be edited by selecting required attributes or parameters from within the report designer.
7) Running a COUNTER 5 Standard report

Selecting a COUNTER 5 Standard report from the COUNTER Standard report folder will generate a pre-configured COUNTER compliant version of that standard report. COUNTER 5 Standard reports are fixed and cannot be changed.

8) Exporting and saving data

Data from any report can be exported to CSV and saved locally.
The report will be downloaded in COUNTER compliant format.

9) Additional features

The PDC COUNTER Release 5 portal includes a number of additional user-friendly features to aid report customisation.

- Change chart type in dashboard
- Change report rankings – click on column header (second click switches between ascending and descending)

- Drag and drop columns to change report layout
10) Help

a. In portal help

Help materials, including the Help Widget are available within the reporting portal. Help is available from the Help button in the top toolbar or from the dropdown when you click on your account name.

b. PDC Customer Services

For most direct support issues please contact PDC Customer Services as follows:

Insert PDC support details

c. Scholarly iQ

For technical portal and SUSHI support issues please contact support@scholarlyiq.com.
11) SUSHI

R5 SUSHI Setup

The Standardized Usage Statistics Harvesting Initiative (SUSHI) protocol is an automated request and response model for harvesting usage data.

To access your COUNTER 5 compliant reports from PDC, simply follow the 5 easy steps to retrieve your SUSHI access credentials today. With these, you can begin harvesting usage reports using your preferred SUSHI ERM tool.

The PDC SUSHI web service is available 24 hours per day, 7 days a week. If you need assistance beyond the self-service SUSHI activation process, please contact the PDC Help Desk for further assistance.

**Step 1**

Go to your PDC account page and log in. Navigate to the Librarian Portal.

**URL to be provided**
Step 2

Click down your account name and select SUSHI. This will navigate to the SUSHI registration page.

Step 3

Enter your Email, First Name, and Last name. Click Create SUSHI Credentials.

Step 4

You will then be presented with your SUSHI credentials. They will also be emailed to you. You may also download a list of the authorized COUNTER reports supported by PDC.

The required SUSHI account credentials for your institution will include:

Requestor ID:
Institution ID/Customer ID:
Step 5

To then access the PDC SUSHI web service, simply point your own SUSHI client or access software to the following service URL: https://sushi5.scholarlyiq.com/counter/r5.

Your SUSHI Client application’s “ReportRequest” will require the supplied Requestor ID, Institution ID (Customer Reference) as well as The Report Type, the Report Version (3) and the Usage ranges you want to harvest.

If you have any questions about our service or need some assistance, please contact our support desk at [CLIENT SUPPORT DESK EMAIL].