



# COUNTER METRICS

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The R5.1 Friendly Guide to

# COUNTER for Consortia

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**This is part of a suite of Friendly Guides demystifying Release 5.1 of the COUNTER Code of Practice**

The complete series is:

- Introducing COUNTER Reports
- Introducing COUNTER Metrics
- COUNTER and Open Access
- Working with COUNTER Reports
- COUNTER for Consortia
- Becoming COUNTER Compliant
- COUNTER Attributes, Elements, and Other (Slightly) Techy Things
- Changes in Release 5.1

Note: for ease of reading we have used plain English in all the Guides. For technical reasons, the Code of Practice itself uses underscores to link words – thus Data Type is actually Data\_Type, and Total Item Investigations is Total\_Item\_Investigations.

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## Consortia reporting in R5.1

There are three types of consortia reporting: summary reports, detailed reports and institutional reports.

Summary reports show a consortium-level summary of usage that is not broken down by institution. That is, all usage for all members of the consortium is rolled up into one summary Platform Report, Database Report, Title Report, or Item Report. These summary reports can't be broken down to show usage at individual member institutions. Summary reports are required in R5.1.

Institutional reports are the standard individual institutional-level reports not aggregated or summarised. We specify that consortia administrators need to be able to retrieve institutional reports for individual consortium members using the same login as they use for their summary reports.

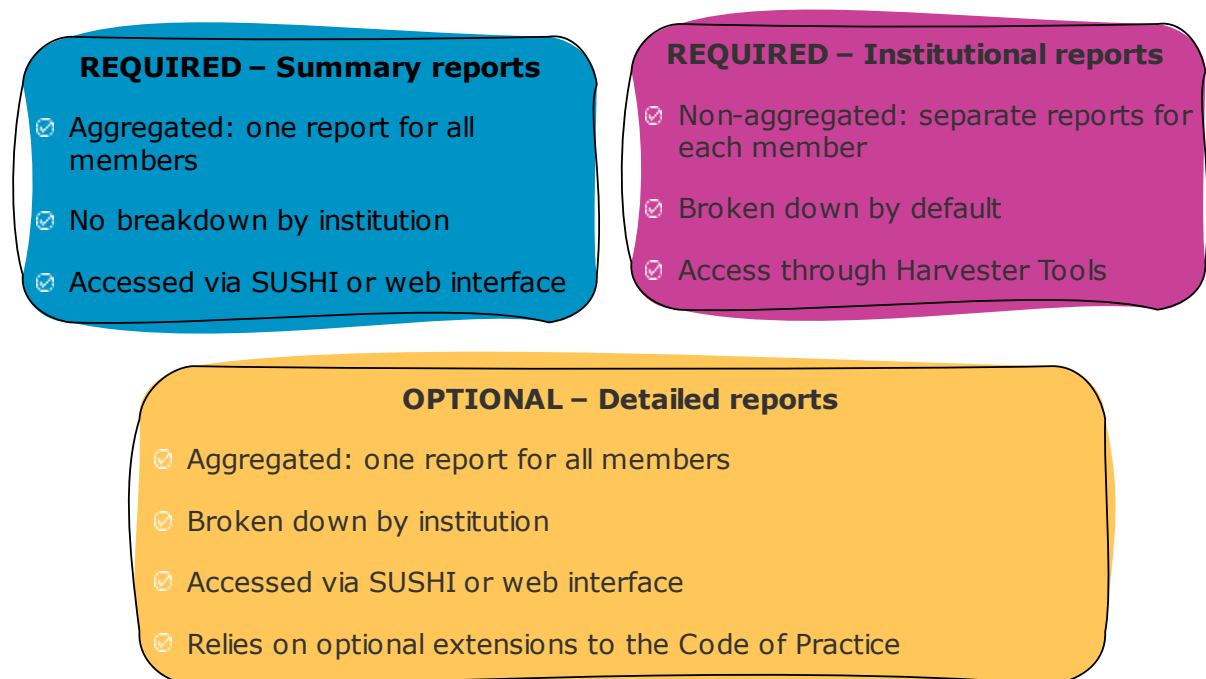


Figure 1. The three types of consortia reporting.

Detailed reports are aggregated usage reports broken down by institution, and are not a requirement of R5.1. They aren't required because it can be very difficult for report providers to consistently generate these detailed reports. For example, if sales and usage systems aren't linked it may not be possible to model a consortium in the usage system.

## Getting hold of institutional and summary reports

As a consortia manager you are able to download your summary reports in the same way as any other librarian downloading any other COUNTER report – that is, by logging into the publisher’s administration tools, or via the COUNTER API (formerly sushi).

For gathering institutional reports, one option is to collect usage reports using what we call Harvester Tools – there’s a list of them on our website. Harvester Tools typically use the COUNTER API, described in the *Friendly Guide to Working with COUNTER Reports*. Provided you have a list of consortia member institutions and their COUNTER API credentials, you will be able to use a Harvester Tool to collect usage reports for each institution within your consortium.

## Getting hold of detailed reports

While COUNTER doesn’t require detailed reports, we do have a mechanism for publishers to offer them using extensions (as described in the *Friendly Guide to COUNTER Attributes, Elements, and Other (Slightly) Techy Things*).

To deliver detailed reports publishers need to add extra elements to their COUNTER Reports: Customer ID (essential) and Institution Name (optional). By including these elements, consortia-level detailed reports can be broken down by institution.

R5.1 specifies some rules about how to use the extensions to make sure that reports are consistent across the publishers who choose to use them:

- ❖ The *Customer ID* used in a consortium report must match the name used in a report to the individual institution, and the ID for the institution returned by the /members COUNTER API path.
- ❖ The *Institution Name* has to match in the same way.
- ❖ If Institution Name is provided it should be the first column in the tabular report, with Customer\_ID the second column. Otherwise Customer ID should be the first column.

Remember that extensions only apply in the COUNTER Reports, not the Standard Views of COUNTER Reports. If you want to work with a Standard View

you will need to apply filters to the relevant COUNTER Report: for example, you'd filter the Title Report using Data Type Book, Access Type Controlled, Access Method Regular, to get to the TR\_B1 Standard View. Our *Friendly Guide to Working with COUNTER Reports* has more information about filtering.

## Some caveats

If you are requesting usage reports for a consortium, you may only see usage for content that has been purchased through the consortium rather than usage for all content available at individual member institutions. If that's the case, the report provider has to make it clear in the /members path of the COUNTER API. The reverse is also true – some report providers will show everything used by all members of the consortium, even in the content has been purchased separately.

Consortium reports may also differ from institutional ones where usage can be attributed to more than one institution in a consortium, for example where their IP ranges overlap (see the Friendly Guide to COUNTER and Open Access for more on attribution).

Finally, we know that some institutions consider their usage data to be sensitive information, so consortium members have the option to opt-out of consortium reporting. That will naturally affect the metrics you see in consortium reports.

### Find out more

There is a lot more information in the full Code of Practice (<https://cop5.projectcounter.org/en/5.1>) and of course on our website at <https://countermetrics.org>).

If you have questions that haven't been answered elsewhere, please don't hesitate to email our Executive Director: [tasha@countermetrics.org](mailto:tasha@countermetrics.org)



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