The R5.1 Friendly Guide

Introducing COUNTER Reports
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What are the COUNTER Reports?
There are four COUNTER Reports, each of which has Standard Views associated with it. The COUNTER Reports are designed to be comprehensive and offer maximum flexibility in working with metrics. By contrast the Standard Views of COUNTER Reports are pre-set summaries of particular types of activity. They don’t include every metric and often are focused on only one or two Data Types.

![Diagram of COUNTER Reports]

Figure 1. The four COUNTER Reports.

You can view full samples of all the COUNTER Reports in the Code of Practice (https://cop5.projectcounter.org/en/5.1). The images provided below are deliberately short to make them easier to read.

**Platform Reports**

The Platform Report, or PR, is a high-level view of all activity on a platform (that’s the term we use for publisher websites). It includes every COUNTER metric, broken down by Data Type as standard and by Access Method on request.

Let’s take an example where a platform includes books, journals, and multimedia. This particular platform doesn’t have any open access content, but it does make some things free to read. It does not offer text and data mining, so the Access Method for usage is always Regular.

The PR for this platform would split out usage to show the Data Types Book, Journal and Multimedia separately, but would not be more granular than that – so this isn’t the report to use if you want to know usage of a particular title.

Within each Data Type the PR would then be broken down into separate rows for Access Types Controlled and Free To Read.

Finally, the PR would break things down further by Metric Types.
Table 1: What to expect of a Platform Report – remember, a full sample is available in the Code of Practice!

<table>
<thead>
<tr>
<th>Platform</th>
<th>Data Type</th>
<th>Metric Type</th>
<th>Reporting Period Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website A</td>
<td>Book</td>
<td>Unique Item Requests</td>
<td>16</td>
</tr>
<tr>
<td>Website A</td>
<td>Journal</td>
<td>Unique Item Requests</td>
<td>59</td>
</tr>
<tr>
<td>Website A</td>
<td>Multimedia</td>
<td>Unique Item Requests</td>
<td>12</td>
</tr>
</tbody>
</table>

... ... ...

Standard Views of Platform Reports
There’s only one Standard View of the Platform Report, called Platform Usage or PR_P1. It filters the PR to show only three metrics: Total Item Requests, Unique Item Requests, and Searches Platform.

Database Reports
The Database Report, or DR, shows activity for specific databases on a platform and it includes every COUNTER metric, with key information about the database itself. broken down by Data Type as standard and by Access Method on request.

In this scenario our publisher platform includes a database of fulltext content, which is available only to subscribers and which can be data mined.

Table 2: What to expect of a Database Report (full sample available in the Code of Practice).

<table>
<thead>
<tr>
<th>Database</th>
<th>Database metadata</th>
<th>Data Type</th>
<th>Metric Type</th>
<th>Reporting Period Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database B</td>
<td>...</td>
<td>Database Full</td>
<td>Searches Regular</td>
<td>352</td>
</tr>
<tr>
<td>Database B</td>
<td>...</td>
<td>Database Full Item</td>
<td>Total Item Investigations</td>
<td>113</td>
</tr>
<tr>
<td>Database B</td>
<td>...</td>
<td>Database Full Item</td>
<td>Unique Item Investigations</td>
<td>98</td>
</tr>
<tr>
<td>Database B</td>
<td>...</td>
<td>Database Full Item</td>
<td>Total Item Requests</td>
<td>83</td>
</tr>
<tr>
<td>Database B</td>
<td>...</td>
<td>Database Full Item</td>
<td>Unique Item Requests</td>
<td>81</td>
</tr>
<tr>
<td>Database B</td>
<td>...</td>
<td>Database Full Item</td>
<td>No License</td>
<td>2</td>
</tr>
</tbody>
</table>

... ... ...

The DR for this platform would show the abstracts database with Data Type Database AI, and Access Type Controlled. Since the database can be used for text and data mining, the DR would break down usage to show Access Methods Regular and TDM, and of course it would then refine things further by Metric Types.
Standard Views of Database Reports
There are two Standard Views of the Database Report:

❖ Database Search and Item Usage (DR_D1) filters the DR to show Total and Unique Item Investigations, and Total and Unique Item Requests, plus Searches.
❖ Database Access Denied (DR_D2) filters the DR to show denials, also known as turnaways.

Title Reports
Titles is a term we use frequently within COUNTER. It includes books and journals, but also conference proceedings, reports, theses, and other such materials. You can find out more about titles in the Data Type section of the Friendly Guide to COUNTER Attributes, Elements, and Other (Slightly) Techy Things.

The Title Report (TR) shows activity for specific titles on a platform and it includes every COUNTER metric as well as key information about the title (e.g. ISBN or ISSN). It is broken down by Data Type as standard, but also by Access Type, Access Method, and year of publication (YOP) on request.

Table 3. What to expect of a Title Report. This is a lengthy report, so the full sample available in the Code of Practice will be valuable in understanding it.

<table>
<thead>
<tr>
<th>Title</th>
<th>Title metadata</th>
<th>Data Type</th>
<th>YOP</th>
<th>Access Type</th>
<th>Metric Type</th>
<th>Reporting Period Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title C</td>
<td>...</td>
<td>Book</td>
<td>2022</td>
<td>Controlled</td>
<td>Unique Item Requests</td>
<td>15</td>
</tr>
<tr>
<td>Title C</td>
<td>...</td>
<td>Book</td>
<td>2022</td>
<td>Controlled</td>
<td>Unique Item Requests</td>
<td>48</td>
</tr>
<tr>
<td>Title D</td>
<td>...</td>
<td>Journal</td>
<td>2023</td>
<td>Controlled</td>
<td>Unique Item Requests</td>
<td>319</td>
</tr>
<tr>
<td>Title D</td>
<td>...</td>
<td>Journal</td>
<td>2023</td>
<td>Open</td>
<td>Unique Item Requests</td>
<td>547</td>
</tr>
<tr>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td></td>
<td>...</td>
</tr>
</tbody>
</table>

In this scenario, our publisher platform includes whole books, as well as serialised journals and conference proceedings, with a mixture of open access, free, and subscriber-only content. The platform can be data mined.

The TR for this platform would show each book title separately with Data Type Book, each journal title with Data Type Journal, and each conference proceeding title with Data Type Conference. Since the journals and conferences are serials,
they would be refined by YOP, while each book would have only a single YOP. With text and data mining allowed the TR would break down usage to show Access Methods Regular and TDM, and of course it would then refine things further by Metric Types.

**Standard Views of Title Reports**

There are three Standard Views of the Title Report for books and reference works, or sections within books and reference works:

- Book Requests (Controlled) (TR_B1) filters the TR to show Total Item Requests and Unique Title Requests for Controlled (i.e. subscriber-only) books and reference works or sections within them.
- Book Access Denied (TR_B2) filters the TR to show access denials to books and reference works or sections within them.
- Book Usage by Access Type (TR_B3) filters the TR to show all relevant metrics for books, broken down by Access Type so that Controlled, Open, and Free To Read books and reference works or sections within them can be clearly distinguished.

There are also four Standard Views of the Title Report for journals:

- Journal Requests (Controlled) (TR_J1) filters the TR to show Total Item Requests and Unique Item Requests for Controlled articles within journals.
- Journal Access Denied (TR_J2) filters the TR to show access denials to articles within journals.
- Journal Usage by Access Type (TR_J3) filters the TR to show all relevant metrics for articles within journals, broken down by Access Type so that Controlled, Open, and Free To Read usage can be clearly distinguished.
- Journal Requests by YOP (Controlled) (TR_J4) is a more granular view of TR_J1 that includes a breakdown by year of publication.

**Item Reports**

Item is another common term within COUNTER. It includes things like articles, videos, book sections, database records and so on. You can find out more about items in the Data Type section of the *Friendly Guide to COUNTER Attributes, Elements, and Other (Slightly) Techy Things.*
The Item Report, or IR, is very granular, showing every applicable COUNTER metric for every single item on a platform, with a lot of information about the item itself (e.g. identifier, parent title if any). It is broken down by Data Type as standard, but also by Access Type, Access Method, and year of publication (YOP) on request.

In this scenario, our publisher platform includes lots of multimedia items, some of which are open access. The platform cannot be data mined.

The IR for this platform would show each multimedia item with its relevant Data Type and Access Type (Controlled for the subscriber content, Open for the open access materials). Since the database cannot be data mined the Access Method would always be Regular. Each item’s record would then be refined to show activity for each Metric Type.

Table 4: What to expect of an Item Report. IR is our most comprehensive report, so again the full sample available in the Code of Practice will be valuable in understanding it.

<table>
<thead>
<tr>
<th>Item</th>
<th>Item metadata</th>
<th>Parent metadata</th>
<th>Data Type</th>
<th>Access Type</th>
<th>Metric Type</th>
<th>Reporting Period Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item E</td>
<td>...</td>
<td>Title C</td>
<td>...</td>
<td>Book Segment</td>
<td>Controlled</td>
<td>Unique Item Requests</td>
</tr>
<tr>
<td>Item F</td>
<td>...</td>
<td>Title D</td>
<td>...</td>
<td>Article</td>
<td>Open</td>
<td>Unique Item Requests</td>
</tr>
<tr>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
</tr>
</tbody>
</table>

**Standard Views of Item Reports**
There are two Standard Views of the Item Report:

- Journal Article Requests (IR_A1) filters the IR to show only items with Data Type Article.
- Multimedia Item Requests (IR_M1) filters the IR to show only items with Data Type Multimedia, or the more granular multimedia types of Audiovisual, Image, Interactive Resource and Sound.

**Which report should I use?**
We always recommend using one of the four COUNTER Reports – Platform, Database, Title, or Item – as these give you lots of options for working with the data. Typically the Database and Title Reports offer the best balance of
granularity with a usable amount of information. By contrast the Platform Report is best suited for a birds-eye view of usage, while the Item Report is excellent for extremely granular data analysis.

All COUNTER Reports can be filtered easily, and we have produced the *Friendly Guide to Working With COUNTER Reports* to highlight how that works. If you do want to use the Standard Views, make sure you choose one that is appropriate for your needs. If you want to know about usage of open access articles, for example, using the TR_J1 wouldn't be helpful.

**What about open access usage?**
We recommend using the Global Item Report for checking on OA usage. That's covered in a lot more detail in the *Friendly Guide to COUNTER and Open Access*. While not mandatory, we do recommend that every platform offer the Global Item Report.

**Who needs to supply the various COUNTER Reports?**
R5.1, like earlier versions of the Code of Practice, includes information about which reports different types of platform should provide. This is done using the Host Type. The COUNTER Registry includes information about platforms’ Host Types, so if you want to know what reports to expect from a specific platform check out [https://registry.projectcounter.org](https://registry.projectcounter.org).

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