22nd Community Call

OPENAIRE CONTENT PROVIDERS MANAGERS

From COUNTER CoP Release 4 to Release 5: Updates in the new usage statistics reports and metrics

OpenAIRE

European Commission

08/06/2022

AGENDA:

1) OpenAIRE Provide updates

2) Main topics for discussion

❖ **Updates in the new usage statistics reports and metrics: COUNTER CoP Release 4 and Release 5**

3) Discussion

Notes & Agenda ⇨ **https://bit.ly/2rTgJwy**

OpenAIRE

European Commission

www.openaire.eu/provide-community-calls

OpenAIRE PROVIDE – recent news & reminders

Index and stats update – info

Content updated on the portals: 25 May.

www.openaire.eu/aggregation-and-content-provision-workflows

Terms of Use

Updates in the Dashboard interface

Deployed in Production (since May 24th)

➢ Access your datasource dashboard and update the ToU

CRIS systems registration

Deployed in Production (since May 24th)

Requirements to register:

✓ Registered in DRIS (Directory of CRIS)

✓ Compatible with OpenAIRE Guidelines for CRIS managers

Public roadmap

Follow up the PROVIDE activity and feel free to vote features and add comments.
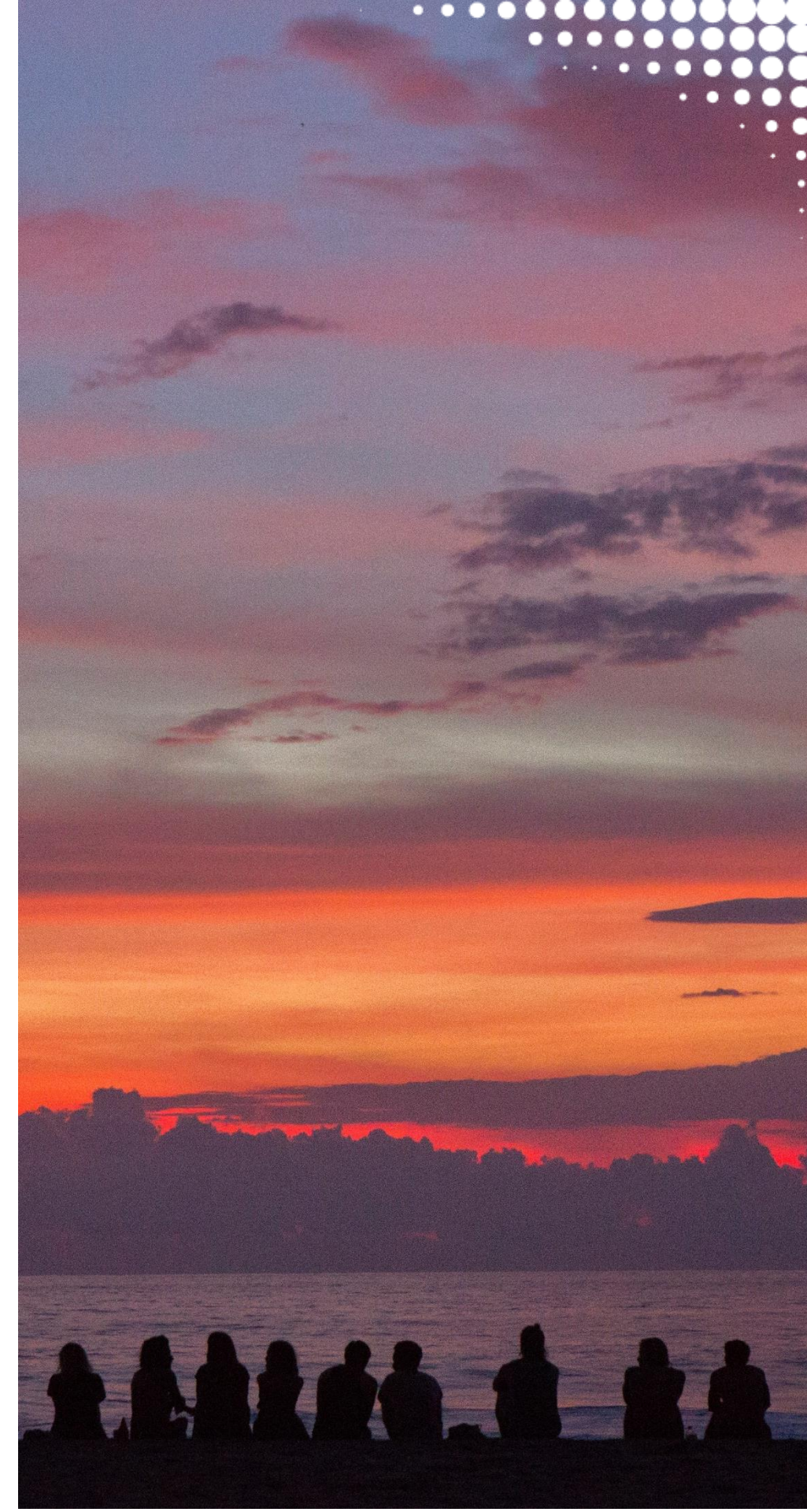
https://trello.com/b/JHbHKLZ4/openaire-provide-roadmap

From COUNTER CoP Release 4 to Release 5

Updates in the new usage statistics reports and metrics

OpenAIRE UsageCounts

Dimitris Pierrakos
OpenAIRE

UsageCounts Service Features

- The Usage Statistics Service of OpenAIRE Research Graph

- Tracking of usage with specialized server-side software (PUSH)

- Collecting COUNTER reports (R4 and R5) (Pull)

- Anonymization of IPs

- Metadata de-duplication enables accumulation of usage for same research outputs

- COUNTER Code of Practice compatibility to provide standards based usage statistics.

- Indicators that complements other (traditional and alternative) bibliometric indicators to provide a comprehensive and recent view of the impact of academic resources.
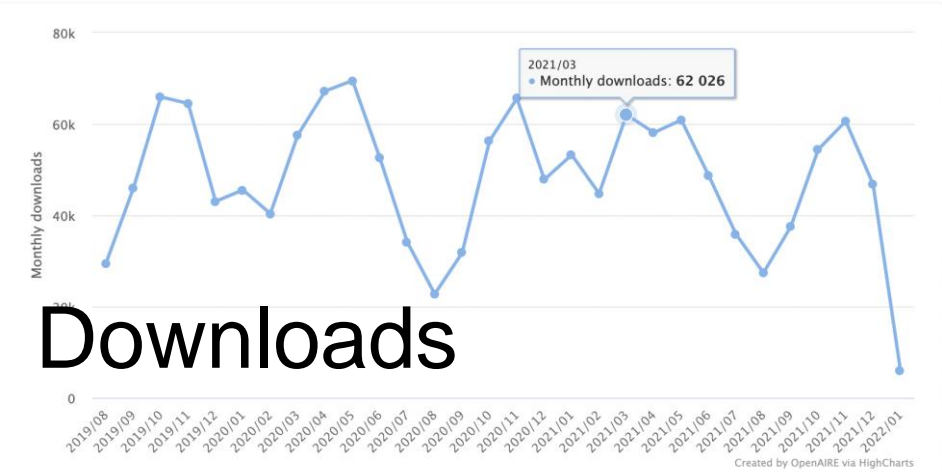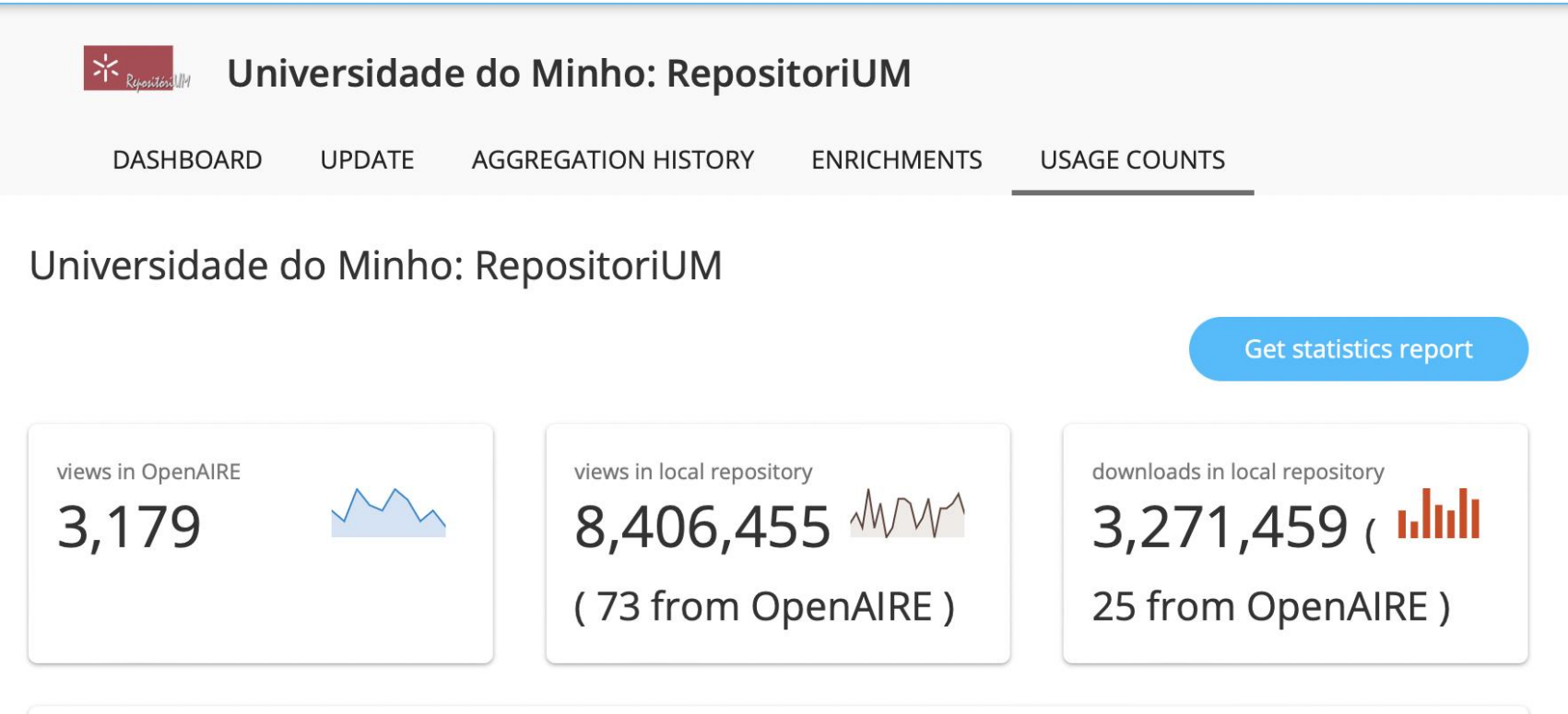
COUNTER CoP Timeline

- Before COUNTER
  - Not Consistent, not comparable usage statistics, i.e. not standard

- Release 1 (2003)
  - Journals and Databases

- Release 2 (2005)
  - Platform-wide use

- SUSHI (2006)
  - automate harvesting of reports

- Release 3 (2009)
  - Book reports, journal archive and YOP

- Release 4 (2013)
  - 24 Reports including multimedia reports, book chapter reports

- Release 5 (2019)
  - 4 Master reports
  - New CoP
  - New concepts, metrics, filters, etc

Current Status: COUNTER CoP R4 Metrics

Universidade do Minho: RepositoriUM

DASHBOARD   UPDATE   AGGREGATION HISTORY   ENRICHMENTS   **USAGE COUNTS**

Universidade do Minho: RepositoriUM

Get statistics report

views in OpenAIRE
3,179

views in local repository
8,406,455
(73 from OpenAIRE)

downloads in local repository
3,271,459 (
25 from OpenAIRE)

Views

Downloads

Current Status: COUNTER CoP R4 Reports

Supported Reports

AR1

Article Report 1, number of successful article download requests by month and repository.

IR1

Item Report 1, number of successful item download requests by month and repository.

RR1

Repository Report 1, number of successful item downloads for all repositories participating in the usage statistics service.

BR1

Book Report 1, number of successful title requests by month and title.

BR2

Book Report 2, number of successful section requests by month and title.

COUNTER CoP R4

![OpenAIRE UsageCounts]

AR1 report for Universidade do Minho: RepositoriUM

Report Request

Report Name
AR1

Release
4

Requestor
repositorium@sdum.uminho.pt

Report Filters

Date range

Valid date formats are yyyy-mm-dd or yyyy-mm. Default range is the last available month.

Begin Date
2016-03

End Date
2016-06

Filters

For more specific results, provide an Item Identifier.
Identifier format: namespace:value
Valid namespace for Item Identifier: openaire, doi or oid(for OAI-PMH).

Repository Identifier
opendoar:307

Item Identifier
e.g. openaire:od_____::fb90de6f20d79783d0574

Report Attributes

Valid Granularity values: Monthly or Totals

Granularity
Monthly

Get Report

COUNTER CoP R4

UsageCounts: Upcoming Updates

COUNTER Code of Practice R5

- Metric Types
- Other Concepts
- Reports

COUNTER CoP R5 Metric_Types

- An **investigation** is tracked when a user performs any action in relation to a content item or title
- A **request** is specifically related to viewing or downloading the full content item
- COUNTER R4: ~~Views/Downloads~~

COUNTER CoP R5 Updates: Metric Types

- **Unique_Item_Investigations**: Counts unique article investigations and requests in a user-session.

- **Total_Item_Investigations**: Counts total number of times information related to an article viewed (including all article full-content views).

- **Total_Item_Requests**: Counts all article full-content views across all formats like HTML and PDF. This is equivalent to the Release 4 usage count.

- **Unique_Item_Requests**: Counts unique article full-content views in a given session regardless of format. If a user views an article PDF and HTML in the same session this would only count as 1.

COUNTER CoP R5: Example Scenario

Susan is researching the history of Porto in UMINHO repository. From a list of search results, she opens three article abstracts. The counts are:

- total_item_investigations: 3

- unique_item_investigations: 3

After reading the abstracts, Susan downloads the PDFs for two of the articles. The counts change to:

- total_item_investigations: 5 (3 as "views" + 2 as "downloads")

- unique_item_investigations: 3 (3 unique "views")

- total_item_requests: 2

- unique_item_requests: 2

R4 Downloads vs R5 Total_Item_Requests
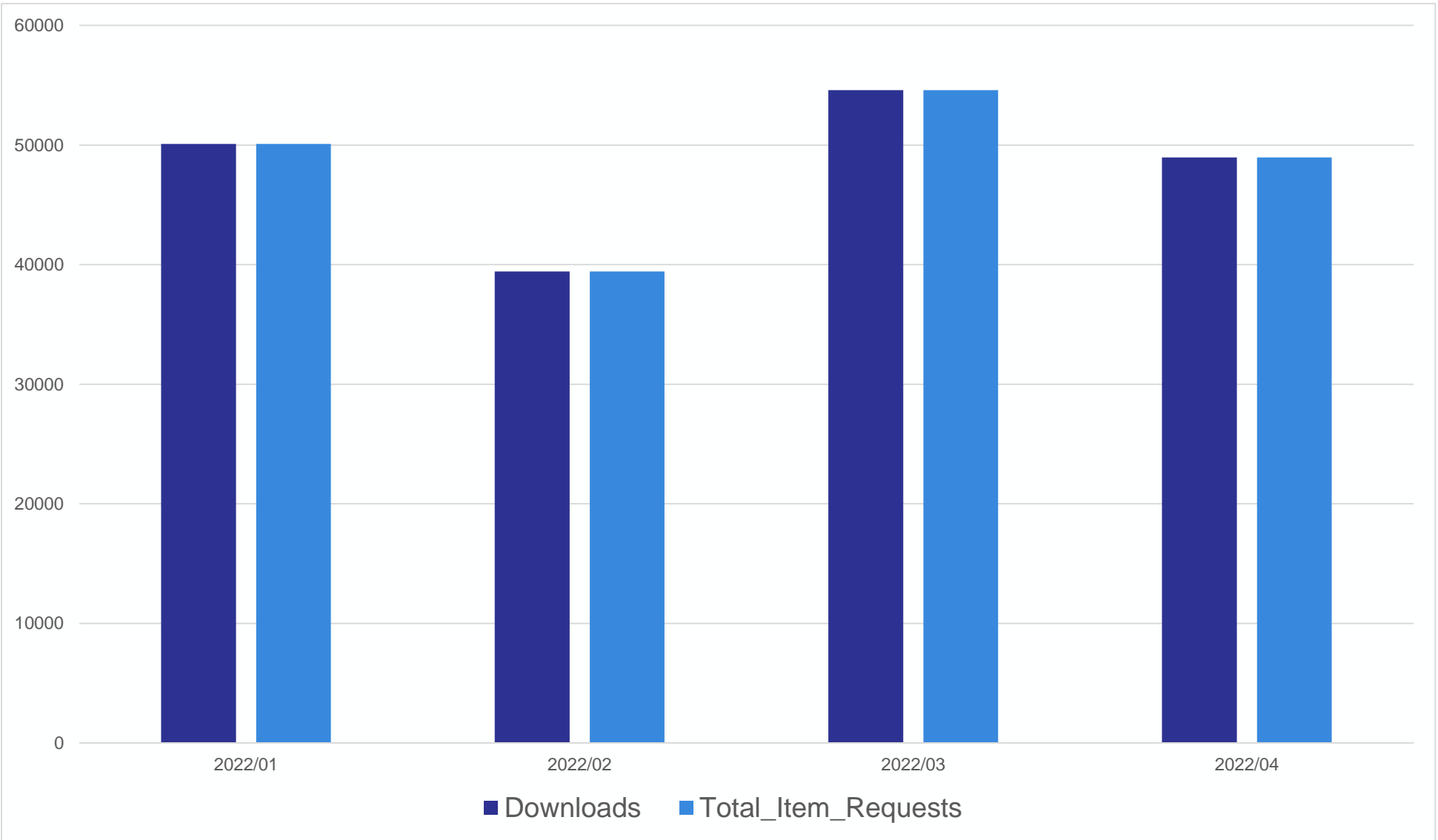
R4 Views vs R5 Total_Item_Investigations
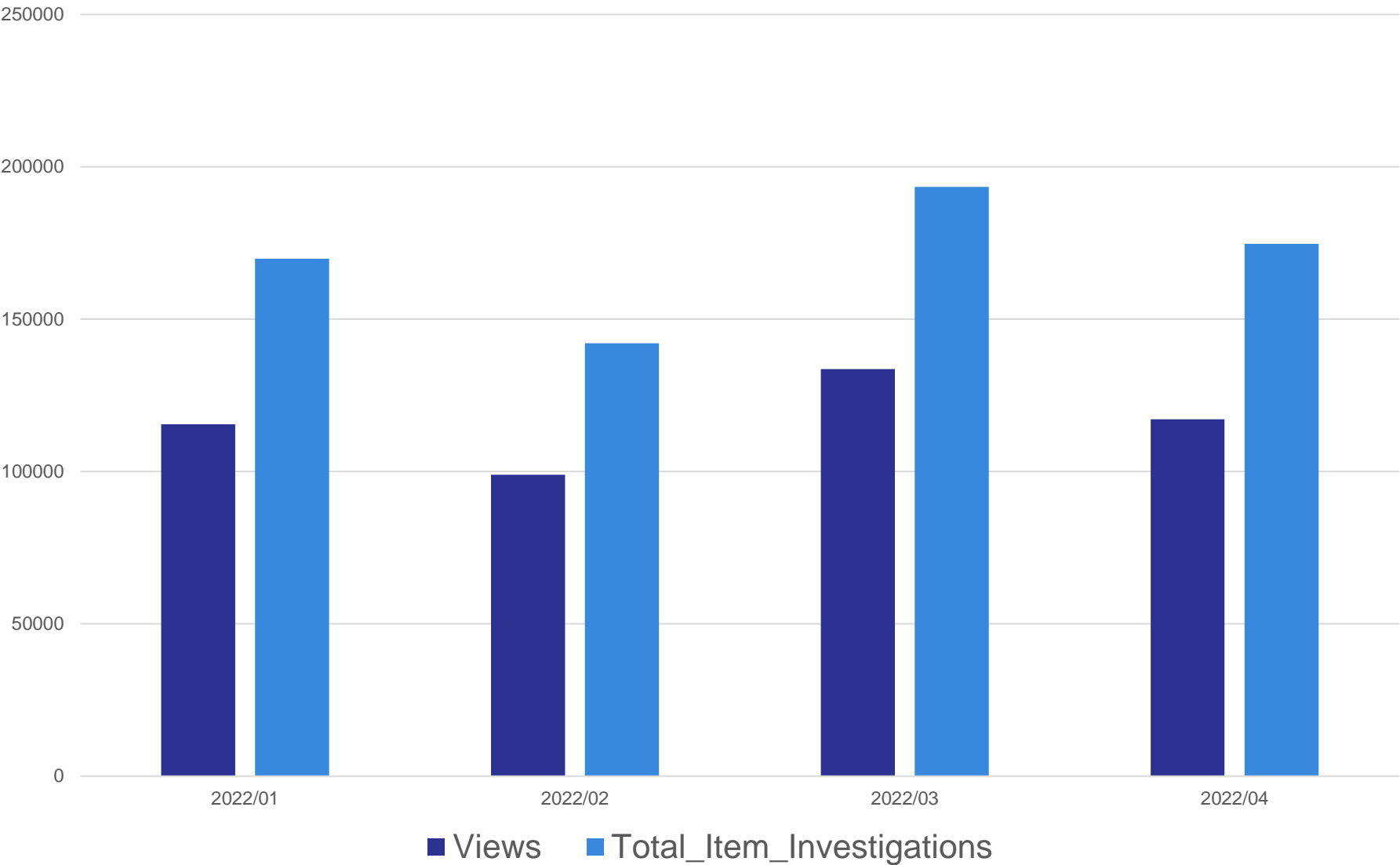
CoP R5 Metric Types Features

- **Total Item Requests**
  - Important for providers 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

R5 Data_Types (R4 Items)

Data_Type identifies the general type of content being accessed or for which usage is being reported.

Data_Type
• Article
• Book
• Book Segment
• Collection
• Database
• Dataset
• Journal
• Multimedia
• Platform
• Repository Item

CoP R5 Access_Type

Access_Type describes the nature of access control that was in place when the content item was accessed.

This attribute appears in Journal Title Report 1 and allows usage of open access content to be separated from content that requires a license.

Data_Type
• Controlled
• OA_Delayed
• OA_Gold_APC
• OA_Gold_Non_APC
• Other_Free_to_Read

CoP R5 Access_Method

Access_Method is an attribute indicating whether the usage related to investigations and requests was generated by a human user browsing and searching a website ("regular") or by Text and Data Mining processes (TDM).

This attribute appears as an optional parameter in the Expanded Title Report.

TDM usage is excluded from the standard Journal and Book reports.

Access_Method
• Regular
• TDM

CoP R5 Year of Publication

YOP is the year of publication for the content item accessed. If content is available in print and online format and the publication dates of these two formats differ, the year of publication of the print will be used.

This attribute appears as an attribute in Journal Title Report 2 as well as both Book Reports and as an optional parameter in the Expanded Title Report.

Access_Method
• *yyyy*
• *0001 (unknown)*
• *9999 (articles in press)*

COUNTER CoP R5 Reports

OpenAIRE
UsageCounts

- Reduced number of reports (4 Master, 16 Total vs 24).

- Many of the special-purpose reports that are seldom used are replaced with a small number of flexible generic reports.

- All COUNTER R4 reports have either been renamed or eliminated in favour of other COUNTER R5 report options.

- Filter to show selected:
  - Dates
  - Content/Data types
  - Metric types
  - Year of Publication
  - License types
  - and more in various combinations

COUNTER CoP R5 Reports

Report_ID	Report_Name
PR	Platform Master Report
PR_P1	Platform Usage
DR	Database Master Report
DR_D1	Database Search and Item Usage
DR_D2	Database Access Denied
TR	Title Master Report
TR_B1	Book Requests (Excluding OA_Gold)
TR_B2	Book Access Denied
TR_B3	Book Usage by Access Type
TR_J1	Journal Requests (Excluding OA_Gold)
TR_J2	Journal Access Denied
TR_J3	Journal Usage by Access Type
TR_J4	Journal Request by YOP (Excluding OA_Gold)
IR	Item Master Report
IR_A1	Journal Article Requests
IR_M1	Multimedia Item Requests

COUNTER CoP R5 Reports

Report Name	Short Description	Description
PR	Platform Master Report	A report summarizing usage activity for the repository by month, metric type and item type
PR_1	Platform Usage Report	A report summarizing usage activity for the repository by month, broken down by metric type
IR	Platform Master Item Report	A report for items requests by month metric_type, item type and repository
DSR	Datasets Report	A report for datasets requests by month metric_type and repository

COUNTER CoP R5 Reports

PR

Platform Master Report

A customizable report summarizing activity across a provider's platforms that allows the user to apply filters and select other configuration options for the report.

PR_P1

Platform Usage

Standard View of the Package Master Report that presents usage for the overall Platform broken down by Metric_Type.

IR

Item Master Report

COUNTER Item Master Report.

DSR

Datasets Report

COUNTER Datasets Master Report.

COUNTER CoP R5 Reports: PR Master

COUNTER CoP R5: PR Report

Platform	Data_Type	Access_Method	Metric_Type	Reporting_Period_Total
Universidade do Minho: RepositoriUM	Article	Regular	Total_Item_ Investigations	10
Universidade do Minho: RepositoriUM	Article	Regular	Unique_Item_Investigations	6
Universidade do Minho: RepositoriUM	Book	Regular	Unique_Item_ Requests	3
Universidade do Minho: RepositoriUM	Book	Regular	Total_Item_Requests	2
Universidade do Minho: RepositoriUM	Book	Regular	Total_Item_Investigations	5
Universidade do Minho: RepositoriUM	Book	Regular	Unique_Item_Investigations	3

COUNTER CoP R5 Reports Attributes

PR	Platform	Data_Type	Access_Method	Metric_Type	Reporting_Period_Total														
IR	Item	Publisher	Publisher_ID	Platform	Authors	Publication_Date	Article_Version	DOI	Proprietary_ID	ISBN	Print_ISSN	Online_ISSN	URI	Parent_Title	Parent_Data_Type	Parent_DOI	Parent_Proprietary_ID	Parent_ISBN	Parent_Print_ISSN
	Parent_Online_ISSN	Parent_URI	Component_Title	Component_Title	Component_Data_Type	Component_DOI	Component_Proprietary_ID	Component_ISBN	Component_Print_ISSN	Component_Online_ISSN	Component_URI	Data_Type	Section_Type	YOP	Access_Type	Access_Method	Metric_Type	Reporting_Period_Total	Monthly_Usage_Details

Call for Feedback

OpenAIRE

Go to

www.menti.com

Enter the code

9263 1606

Or use QR code

THANK YOU

Dimitris Pierrakos

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Community Calls

Upcoming calls & Agendas

Notes & Recordings

June 8th, 2022 [new date] —

Main topic:

- New usage statistics reports: **from Release 4 to** Release 5 of the COUNTER Code of Practice, in which the OpenAIRE UsageCounts statistics reports are based.

Participants will also be asked to give their feedback on the best options for PROVIDE service regarding the delivering of reports based on both Releases 4 and 5, in order to identify the best options to meet their needs.

Time: 2:30 PM - 3:30 PM CEST
Call link: Zoom

May 5th, 2022 +

April 6th, 2022 +

March 2nd, 2022 +

February 2nd, 2022 +

November 3rd, 2021 +

October 6th, 2021 +

June 2nd, 2021 +

May 5th, 2021 +

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