

THE FRIENDLY GUIDE TO RELEASE 5 FOR LIBRARIANS

This guide is a non-intimidating manual for librarians.

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COUNTER

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2. INTRODUCTION

This guide is a friendly introduction to the COUNTER Code of Practice, Release 5, for librarians and other users. It is a counterpart to The Friendly Guide to Release 5 for Providers.

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](#).

2.1 WHAT IS COUNTER?

COUNTER stands for Counting Online Usage of NeTworked Electronic Resources. Our website is at <http://www.projectcounter.org/>.

COUNTER was one of the first, if not the first, standards organization established for the modern information environment. It has succeeded in bringing together a collaboration of publishers and librarians to develop and maintain a standard for counting the use of electronic resources. It has also ensured that most major publishers and vendors are compliant by providing their library customers around the world with COUNTER usage statistics.

COUNTER publishes the Code of Practice, which is the standard for counting the use of electronic resources, and maintains a register of COUNTER-compliant vendors and publishers. Release 5 of the Code of Practice, which is the subject of this Friendly Guide, is subject to continuous maintenance. As the release changes, this guide will be updated.

2.2 WHO USES COUNTER REPORTS?

The COUNTER standard was originally developed to provide a service to librarians and others who purchase subscriptions to publishers' content. The intention was to allow librarians to easily compare their usage across different publishers' content, and let them use that information to calculate a cost-per-download for their subscriptions. COUNTER reports were not originally intended to be used by publishers as a way of measuring usage across their client base, but are increasingly being used for that purpose.

Academic libraries across the world use COUNTER reports to:

- Help them make renewal decisions or new purchasing decisions based on data about usage and access denials

- Inform faculty about the value of the library and its resources
- Understand user behavior and improve user experiences.

Most major vendors and publishers also use COUNTER reports to:

- Provide reliable and consistent usage data to their customers
- Upsell using COUNTER data about access denials
- Inform editors and authors about the usage of their publications.

2.3 HOW CAN YOU TELL IF A PUBLISHER IS COUNTER COMPLIANT?

To become COUNTER compliant, publishers and vendors must undergo an independent audit of their COUNTER reports within six months of signing the Declaration of COUNTER Compliance and annually thereafter, although very small publishers may request permission to be audited every other year. All publishers and vendors who have passed their audits are listed on the COUNTER website and issued with a dated logo confirming their COUNTER compliance.

2.4 HOW IS COUNTER FUNDED AND ORGANIZED?

COUNTER is a not-for-profit membership organization, funded by membership fees and sponsorship.

The membership – publishers, vendors and librarians – lead COUNTER. A Board of Directors has oversight of the financial matters and appoints the Executive Committee to oversee the operation. A Project Director, reporting to the Executive Committee, is responsible for the day-to-day management of COUNTER. The publisher, intermediary and librarian communities are all represented on the Board and on the Executive Committee, as well as on the Technical Advisory Board.

3. COUNTER METRICS

This section of the guide identifies and explains the complete list of metric types included in Release 5. There is also a brief summary of the new attributes associated with Release 5, which are designed to provide flexibility and eliminate the need for special reports.

3.1 USAGE

There are several different types of usage metric in Release 5, which break down 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).

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.

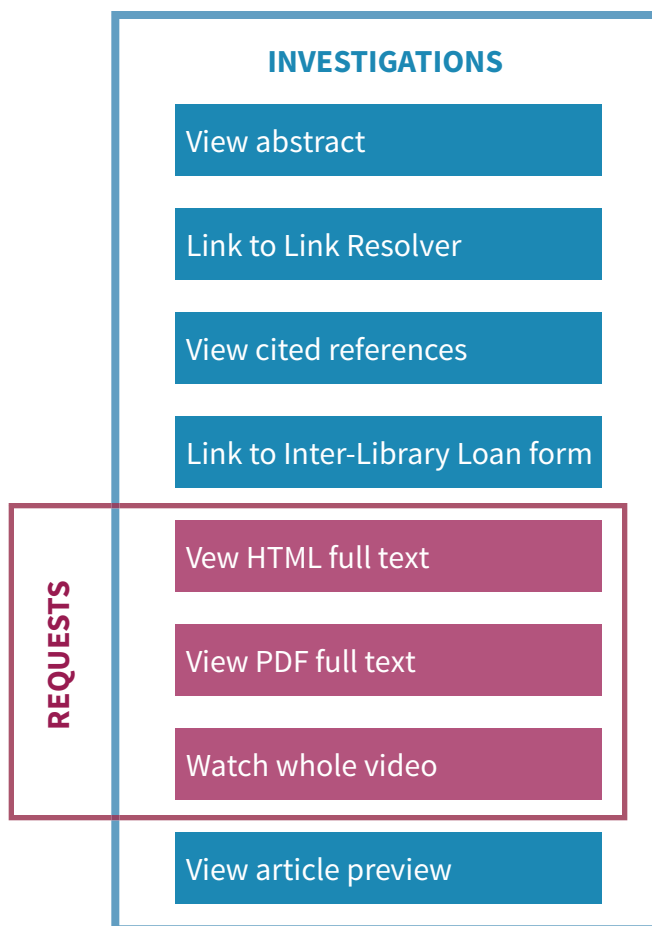


Figure 1: The relationship between “Investigations” and “Requests”

SCENARIO

Camford purchases two journal subscriptions for 2018: Journal X for £25,000 and Journal Y for £10,000. At the end of the year Camford's librarian, Barbara, runs a Release 5 TR_J1 report to check the full-text usage of each journal, excluding Open Access articles. Journal X is showing 60,000 Unique_Item_Requests, while Journal Y shows just 200. Barbara therefore tells her Head Librarian that while Journal X is more expensive, it has a much better cost per unique download.

The calculation looks like this:

- | | | |
|-------------|------------------|---------------------------------|
| ▪ Journal X | £25,000 / 60,000 | = £0.42 per Unique_Item_Request |
| ▪ Journal Y | £10,000 / 200 | = £50 per Unique_Item_Request |

If Camford must choose a journal to cancel, it's likely to be Journal Y.

SCENARIO

Susan is researching the history of antibiotics on Publisher Platform Alpha. From a list of search results she opens three article abstracts and a video record. All four records are different, but two of the articles are from the same journal. The counts are:

- Total_Investigations: 4
- Unique_Item_Investigations: 4
- Unique_Title_Investigations: 3
- Total_Requests: 0
- Unique_Item_Requests: 0
- Unique_Title_Requests: 0

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

- Total_Investigations: 6
- Unique_Item_Investigations: 4
- Unique_Title_Investigations: 3
- Total_Requests: 2
- Unique_Item_Requests: 2
- Unique_Title_Requests: 1

To calculate cost-per download, Barbara should use the two Unique_Item_Requests.

3.2 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.

SCENARIO

Susan is researching the history of antibiotics on Publisher Platform Alpha. From a list of search results, she opens three article abstracts and two video records. Her institution has not subscribed to the video database and she is therefore denied access. The counts are:

- No_License: 2
- Limit_Exceeded: 0

Susan repeats her attempt to access one of the video records five minutes later. The counts are:

- No_License: 3
- Limit_Exceeded: 0

High No_License counts may suggest to Barbara that she should investigate the costs of subscribing to the video database.

SCENARIO

Susan is researching the history of antibiotics on Publisher Platform Alpha. From a list of search results, she opens three article abstracts and two video records. Her institution has a concurrency-limited subscription to the video database, and Susan's usage exceeds that cap. The counts are:

- No_License: 0
- Limit_Exceeded: 2

High Limit_Exceeded counts may suggest to Barbara that she should investigate the costs of increasing the concurrency cap for the video database, so that more users can use it simultaneously.

3.3 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.

SCENARIO

Susan is researching the history of antibiotics on Publisher Platform Alpha. She runs a search for “history AND antibiotics”. The counts are:

- Searches_Regular: 1
- Searches_Automated: 0
- Searches_Platform: 1
- Searches_Federated: 0

For a database like this, the cost per use calculation may be related to searches rather than to full-text downloads; this varies according to individual library practice.

SCENARIO

Susan is researching the history of antibiotics on Publisher Platform Alpha, which includes multiple databases. She runs a search for “history AND antibiotics”. The counts are:

- Searches_Regular: 0
- Searches_Automated: 1
- Searches_Platform: 1
- Searches_Federated: 0

Susan then selects the 'History of Medicine' database and reruns her search. The counts are:

- Searches_Regular: 1
- Searches_Automated: 1
- Searches_Platform: 2
- Searches_Federated: 0

In a separate session, Susan uses an API to search Publisher Platform Alpha. The count for that activity is:

- Searches_Regular: 0
- Searches_Automated: 0
- Searches_Platform: 0
- Searches_Federated: 1

3.4 ATTRIBUTES, ELEMENTS, AND OTHER (SLIGHTLY) TECHY THINGS

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.

4. COUNTER MASTER REPORTS AND STANDARD VIEWS

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.

As shown in the examples below, each Master Report includes all of the COUNTER metrics described above, covering investigations and requests, access denials, and searches, supplemented with a variety of attributes.

KEY POINTS

The set of Master Reports provided by a publisher or vendor will depend on their platform.

All Master Reports can be filtered based on particular attributes, usually YOP, Data_Type, Access_Type, Access_Method, and Metric_Type.

It is also possible to exclude the month-by-month breakdown of activity and show only the total activity for the whole reporting period.

For more details, please see the full Code of Practice.

4.1 REPORT HEADERS

The tabular versions of Release 5 reports have a common format, which looks like this:

Label	Value
Report_Name	Name of the report
Report_ID	Identifier of the report
Release	5
Institution_Name	Name of the institution usage is attributed to
Institution_ID	Identifier(s) for the institution usage is attributed to
Metric_Types	Semicolon-space delimited list of metric types included in the report
Report_Filters	Semicolon-space delimited list of filters applied to the data to generate the report
Report_Attributes	Semicolon-space delimited list of attributes applied to the data to generate the report
Exceptions	Any exceptions that occurred in generating the report
Reporting_Period	Date range covered by the report
Created	Date the report was run
Created_By	Name of organization or system that generated the report
<row left blank>	

Every COUNTER-compliant publisher and vendor will adhere to this common report-header format, as anything else will not be COUNTER compliant. For the purposes of this guide we are showing the header and body information separately, but in the actual report these would be in the same sheet, with the header in cells A1 to B13 and the body of the report below.

5. PLATFORM REPORTS

All publishers and vendors must provide a Platform Master Report (PR) showing activity across all metrics for entire platforms. There is one Standard View for the PR.

Identifier	Name	Description
PR_P1	Platform Usage	A pre-set Standard View of PR showing total and unique item requests, as well as platform searches

5.1 WHAT DOES A PR LOOK LIKE?

PR is a relatively compact report, only six columns across plus monthly breakdowns. Every metric type should be included, but for the purposes of this guide only a subset is shown in the example below.

Example: a PR has been generated for Publisher Platform Alpha (PP α) covering the period from 01 January to 30 June 2017, for Sample University. In this case, users from Sample University have investigated a series of journal and book items, but have not attempted to access any full text: this means that while there is a total of 15 investigations of 11 unique items, the report does not show any requests. Users have also been denied access to a database on three occasions during the report period.

<http://bit.ly/2EYza4n>

Platform	Data_Type	Access_Type	Access_Method	Metric_Type	Reporting_Period_Total
PP α	Journal	Controlled	Regular	Total_Item_Investigations	10
PP α	Journal	Controlled	Regular	Unique_Item_Investigations	6
PP α	Journal	Controlled	Regular	Unique_Title_Investigations	5
PP α	Book	Controlled	Regular	Total_Item_Investigations	5
PP α	Book	Controlled	Regular	Unique_Item_Investigations	5
PP α	Book	Controlled	Regular	Unique_Title_Investigations	3
PP α	Database	Controlled	Regular	No_License	3

6. DATABASE REPORTS

Database Master Reports (DR) show activity across all metrics for entire databases or fixed collections of content which behave like a database. A DR can be filtered according to user needs, and has two Standard Views.

Identifier	Name	Description
DR_D1	Database Search and Item Usage	A pre-set Standard View of DR showing total item investigations and requests, as well as searches
DR_D2	Database Access Denied	A pre-set Standard View of DR showing where users were denied access because simultaneous use (concurrency) licenses were exceeded, or their institution did not have a license for the database

6.1 WHAT DOES A DR LOOK LIKE?

DRs are less compact than PRs, with eleven columns across plus monthly breakdowns. In addition to the columns in PR (Platform, Data_Type, Access_Type, Access_Method, Metric_Type, and Reporting_Period_Total), DR shows the database name within the platform, the publisher details, and the year of publication.

Again, every metric type should be included, but only a subset is shown in the example below.

Example: a DR has been generated for the Multimedia database on Publisher Platform Alpha (PPα) covering the period from 01 January to 30 June 2017, for Sample University. In this case, users from Sample University have investigated eight items in the database, and requested the full record for three of those items. There is also a record of one search of the database during the report period.

<http://bit.ly/2mTfUO5>

Database	Publisher	Publisher_ID	Platform	Proprietary_ID	Data_Type	YOP	Access_Type	Access_Method	Metric_Type	Reporting_Period_Total
Multimedia	Gamma	1234_gam	PPα	ahgoiuaryg	Database	2016	Controlled	Regular	Total_Item_Investigations	8
Multimedia	Gamma	1234_gam	PPα	ahgoiuaryg	Database	2016	Controlled	Regular	Unique_Item_Investigations	8
Multimedia	Gamma	1234_gam	PPα	ahgoiuaryg	Database	2016	Controlled	Regular	Unique_Title_Investigations	1
Multimedia	Gamma	1234_gam	PPα	ahgoiuaryg	Database	2016	Controlled	Regular	Total_Item_Requests	3
Multimedia	Gamma	1234_gam	PPα	ahgoiuaryg	Database	2016	Controlled	Regular	Unique_Item_Requests	3
Multimedia	Gamma	1234_gam	PPα	ahgoiuaryg	Database	2016	Controlled	Regular	Unique_Title_Requests	1
Multimedia	Gamma	1234_gam	PPα	ahgoiuaryg	Database	2016	Controlled	Regular	Searches_Regular	1

7.

TITLE MASTER REPORT

A Title Master Report (TR) shows activity across all metrics for entire titles, which may be books or journals. The TR can be filtered according to user needs and has seven Standard Views, which apply to different Host Types – for example, an eJournal host does not need to provide TR_B1, which relates only to books. TR has an extra filter, Section_Type, in addition to the five which apply to all of the Master Reports.

Identifier	Name	Description	Host Types
TR_B1	Book Requests (excluding OA_Gold)	A pre-set book Standard View of TR showing full-text activity for all content that is not Gold Open Access. Numbers of Unique_Item_Requests may vary between sites, will vary based on whether the content is delivered as a complete book or by chapter, but the Unique_Title_Requests will be the same regardless of delivery mechanism	Aggregated Full Content eBook
TR_B2	Book Access Denied	A pre-set book Standard View of TR showing where users were denied access to books because simultaneous use (concurrency) licenses were exceeded, or their institution did not have a license for the database	eBook
TR_B3	Book Usage by Access Type	A pre-set book Standard View of TR showing all applicable metric types broken down by Access_Type	Aggregated Full Content eBook
TR_J1	Journal Requests (Excluding OA_Gold)	A pre-set journal Standard View of TR showing full-text activity for all content that is not Gold Open Access	Aggregated Full Content eJournal
TR_J2	Journal Access Denied	A pre-set journal Standard View of TR showing where users were denied access to journals because their institution did not have a license for the content, or simultaneous use (concurrency) licenses were exceeded	eJournal
TR_J3	Journal Usage by Access Type	A pre-set journal Standard View of TR showing all applicable metric types broken down by Access_Type	Aggregated Full Content eJournal
TR_J4	Journal Requests by YOP (Excluding OA_Gold)	A pre-set journal Standard View of TR breaking down the full-text usage of non-Gold Open Access content by year of publication (YOP)	Aggregated Full Content eJournal

You'll have noticed that many of these Standard Views exclude Gold Open Access content (the OA_Gold variant of the Access_Type attribute). Investigations and requests for Gold_OA articles are included in the Title Master Report, which will be useful if you want to see what proportion of usage from Hybrid journals is from OA_Gold articles and what proportion is from articles funded by subscription. The other variant of Access_Type is Controlled, which covers subscription content, free-to-read articles, and articles made open after an embargo period.

SCENARIO

Barbara wants to assess the usage from Journal X. She'd like to know what the total usage is, and how much of that usage is for OA_Gold articles. She therefore downloads the Title Master Report (TR). This shows:

- Access_Type: Controlled / Unique_Item_Requests: 49
- Access_Type: OA_Gold / Unique_Item_Requests: 18

Barbara then filters the TR using the YOP (Year of Publication) column, to eliminate the current year and show only articles in her perpetual access backfiles. The TR shows:

- Access_Type: Controlled / Unique_Item_Requests: 18
- Access_Type: OA_Gold / Unique_Item_Requests: 3

7.1 WHAT DOES A TR LOOK LIKE?

TRs are highly detailed and therefore quite lengthy. As well as the core information from the PR (Platform, Data_Type, Access_Type, Access_Method, Metric_Type, and Reporting_Period_Total), TRs also show the title name and identifiers, the publisher details, the Section_Type, and the year of publication, making a total of 17 columns plus monthly breakdowns.

Again, every metric type should be included, but for the purposes of this guide only a subset is shown in the example below.

Example: a TR has been generated for Journal X on Publisher Platform Alpha (PPα) covering the period from 01 January to 30 June 2017, for Sample University. In this case, users from Sample University have investigated eight articles, and requested the full text for three of those articles.

<http://bit.ly/2mVpm3M>

Title	Pub- lisher	Pub- lisher_ ID	Plat- form	DOI	Proprietary _ID	ISBN	Print ISSN	Online_ ISSN	URI	Data_ Type	Section_ Type	YOP	Access_ Type	Access_ Method	Metric_ Type	Re- porting_ Period_ Total
Journal Six	Gamma	1234_gam	PPα	10.1000/ xyz123	xyz123			1110987654321		Journal	Article	2016	Con- trolled	Regular	Total_ Item_ Investi- gations	8
Journal Six	Gamma	1234_gam	PPα	10.1000/ xyz123	xyz123			1110987654321		Journal	Article	2016	Con- trolled	Regular	Unique_ Item_ Investi- gations	8
Journal Six	Gamma	1234_gam	PPα	10.1000/ xyz123	xyz123			1110987654321		Journal	Article	2016	Con- trolled	Regular	Unique_ Title_ Investi- gations	1
Journal Six	Gamma	1234_gam	PPα	10.1000/ xyz123	xyz123			1110987654321		Journal	Article	2016	Con- trolled	Regular	Total_ Item_ Requests	3
Journal Six	Gamma	1234_gam	PPα	10.1000/ xyz123	xyz123			1110987654321		Journal	Article	2016	Con- trolled	Regular	Unique_ Item_ Requests	3
Journal Six	Gamma	1234_gam	PPα	10.1000/ xyz123	xyz123			1110987654321		Journal	Article	2016	Con- trolled	Regular	Unique_ Title_ Requests	1

8. ITEM MASTER REPORT

An Item Master Report (IR) shows activity across all metrics for single items, such as articles or videos; it is particularly useful for assessing usage from institutional repositories. IR can be filtered according to user needs, and has two Standard Views. It also has an extra filter, Section_Type, in addition to the five which apply to all of the Master Reports.

Identifier	Name	Description
IR_A1	Journal Article Requests	A pre-set Standard View of IR showing total item requests for journal articles
IR_M1	Multimedia Item Requests	A pre-set Standard View of IR showing total item requests for multimedia items

8.1 WHAT DOES AN IR LOOK LIKE?

An IR contains so much detail that it is not possible to show an example report here; visit <http://bit.ly/2n0w34m> to see an example. The 36 column heads associated with an IR cover the item itself, its parent, and its component parts, and appear in the IR in this order:

- 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_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

9. COMPARING RELEASE 5 TO RELEASE 4

This section provides a mapping of the key Release 4 reports to their Release 5 counterparts.

Release 5	Release 4 reports covered
PR_P1: Platform Usage	Book Report 4: Access Denied to Content items by Month, Platform, and Category
	Platform Report 1: Total Searches, Result Clicks, and Record Views by Month and Platform
DR_D1: Database Search and Item Usage	Database Report 1: Total Searches, Result Clicks, and Record Views by Month and Database
	Journal Report 4: Total Searches Run by Month and Collection
	Multimedia Report 1: Number of Successful Full Multimedia Content Unit Requests by Month and Collection
DR_D2: Database Access Denied	Database Report 2: Access Denied by Month, Database, and Category
TR: Title Master Report	Book Report 2: Number of Successful Section Requests by Month and Title
	Journal Report 3: Number of Successful Item Requests by Month, Journal, and Page-type
	Journal Report 5: Number of Successful Full-Text Article Requests by Year of Publication (YOP) and Journal
	Title Report 1: Number of Successful Requests for Journal Full-Text Articles and Book Sections by Month and Title
	Title Report 2: Access Denied to Full-Text Items by Month, Title, and Category
	Title Report 3: Number of Successful Item Requests by Month, Title, and Page Type
TR_B1: Book Requests (Excluding OA_Gold)	Book Report 1: Number of Successful Title Requests by Month and Title
	Book Report 2: Number of Successful Section Requests by Month and Title
	Book Report 7: Number of Successful Unique Title Requests by Month and Title in a Session
TR_B2: Book Access Denied	Book Report 3: Access Denied to Content Items by Month, Title, and Category

TR_J1: Journal Requests (Excluding OA_Gold)	Journal Report 1: Number of Successful Full-Text Article Requests by Month and Journal
	Journal Report 1 GOA: Number of Successful Gold Open Access Full-Text Article Requests by Month and Journal
	Journal Report 1a: Number of Successful Full-Text Article Requests from an Archive by Month and Journal
TR_J2: Journal Accessed Denied	Journal Report 2: Access Denied to Full-Text Articles by Month, Journal, and Category
IR_M1: Multimedia Item Requests	Multimedia Report 2: Number of Successful Full Multimedia Content Unit Requests by Month, Collection, and Item Type

9.1 BOOK REPORTS

If you are used to using Release 4's BR1 and BR2 reports to assess book usage, you should now use the TR_B1 report to obtain comparable statistics. The Unique_Title_Requests metric in TR_B1 will tell you the usage for each book, whether the platform delivers whole books or individual chapters.

9.2 ELIMINATED REPORTS

The three Mobile reports (Journal Report 3 Mobile, Title Report 1 Mobile, and Title Report 3 Mobile) have been eliminated because few platforms now offer a bespoke Mobile view, relying instead on responsive design.

Release 5 also eliminates Consortium reports because their size makes creating and consuming them impractical. Consortia should use SUSHI to harvest individual reports for each member; in the longer term, COUNTER will facilitate the creation of tools that will make obtaining consortial usage a simple, one-step process.

The other thing that has been removed from Release 5 Master Reports and Standard Views is zero usage. For technical reasons, not all publishers or vendors are able to determine for which titles and date ranges zero usage would have to be included in their reports. If their systems can deliver this information, they may choose to offer customized reports including zero usage. COUNTER has created a demonstrator in Excel to show how KBart files can be incorporated with Release 5 reports to show titles with zero usage. The can be viewed here: <http://bit.ly/2F37QBR>

10. PUTTING IT ALL TOGETHER

This section walks through a scenario and uses the information to put together a set of COUNTER Release 5 reports.

10.1 ABOUT THE PLATFORM

Publisher Platform Alpha (PPα) hosts a combination of materials: 100 full-text journals, 750 full-text books, and a multimedia database. This means that PPα falls under several Host Types: Aggregated Full Content, eBooks, eJournals, and Multimedia Collection.

Given the Host Types, we know that PPα needs to provide all four of the Master Reports and all of the Standard Views.

10.2 ABOUT THE SUBSCRIBING INSTITUTION

Institution Omega subscribes to the entire journals list on PPα, as well as the multimedia database. It does not subscribe to the books list.

10.3 SCENARIO: SUSAN'S ACTIVITY

Susan is researching the history of antibiotics on PPα. She runs a search across the entire platform (that is, she does not limit her search to the multimedia database).

From the list of search results, Susan opens the following items:

- 2 article abstracts from *Journal of Antibiotics are Fun*
- 1 article abstract from *Journal of Medical Historical Trivia*
- 1 video from the multimedia database
- 1 chapter abstract from *The Big Book of Medical Marvels*
- 1 book abstract of *A Medical History Reference*

This activity triggers a whole series of investigation metrics, as well as some access denials. Note that because Susan's institution has no license to access book content, Release 5 counts two access denials even though she has only attempted to access the abstracts at this point.

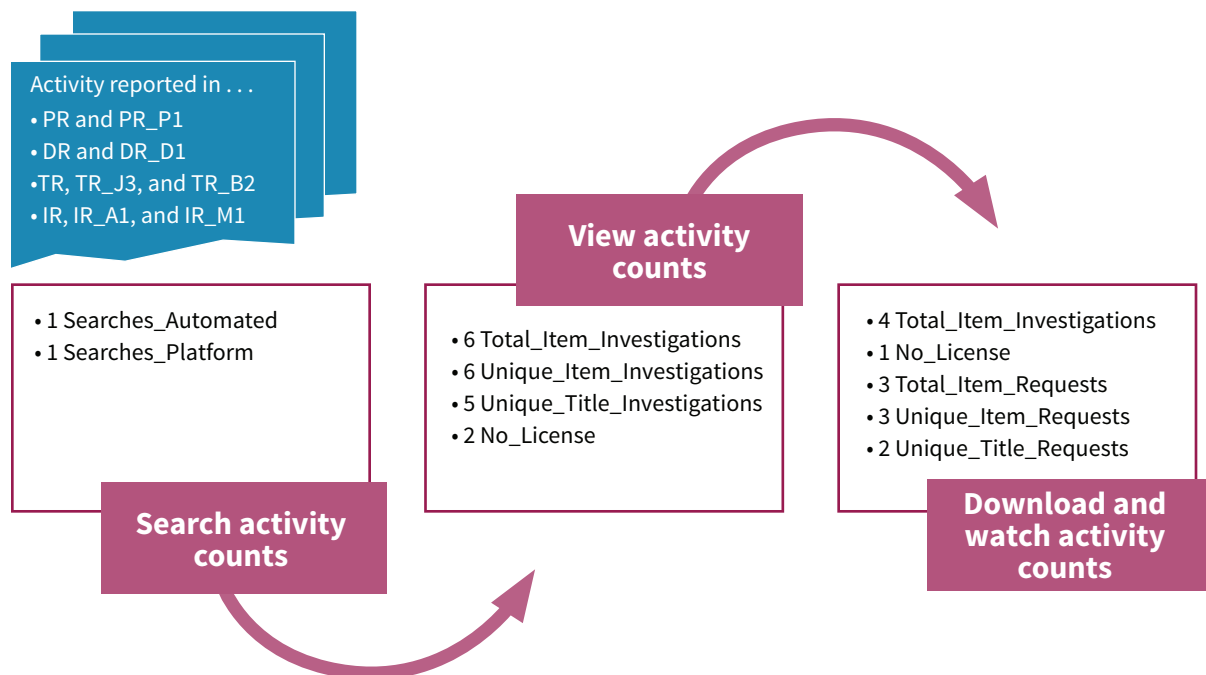
After reading the abstracts, Susan triggers additional investigation and access denial metrics, as well as some request metrics, by:

- Downloading 2 article full-text PDFs from *Journal of Antibiotics are Fun*
- Watching 1 video from the multimedia database
- Attempting to download 1 chapter PDF from *The Big Book of Medical Marvels*

Note that Susan's attempt to download a chapter from *The Big Book of Medical Marvels* counts as an investigation but **does not** count as a request. This is because her institution has not licensed books, and therefore her access is denied.

10.4 IN SUMMARY

Collecting all of this together, Susan's session on PPα results in a whole series of metrics which will be available to her librarian through any of the four Master Reports, or six Standard Views, for delivery to Institution Omega.



ABOUT THE AUTHOR

An active participant in the scholarly publishing community, Tasha is a member of the COUNTER Executive and of the UKSG Education Sub-Committee. Her industry expertise stretches from publishing operations and project management to policy setting, via technology management and business analysis. Tasha can be found on LinkedIn at <https://www.linkedin.com/in/tashamc/>



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