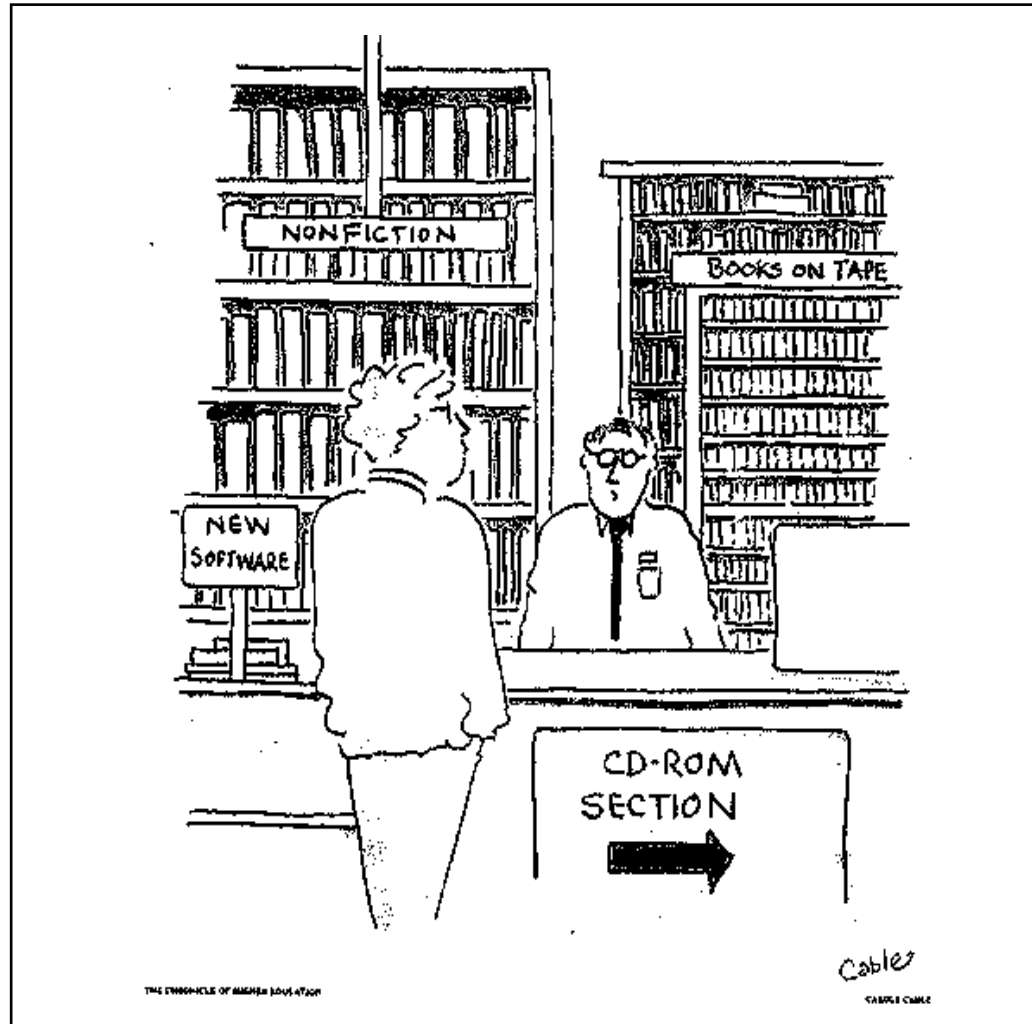




Counting **O**nline **U**sage of **N**eTworked **E**lectronic **R**esources

COUNTER: an introduction

**Peter
Shepherd
Director
COUNTER
July 2008**



If I may be so bold as to inquire, to what degree do you wish to interact with Franz Kafka?

Background

- **Understanding usage**
 - Different approaches
 - Role of usage statistics
- **Usage statistics**
 - Should enlighten rather than obscure
 - Should be practical
 - Should be reliable
 - Are only part of the story
 - Should be used in context
- **COUNTER**
 - Current status
 - Future challenges

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COUNTER

Codes of Practice

- **Definitions of terms used**
- **Specifications for Usage Reports**
 - What they should include
 - What they should look like
 - How and when they should be delivered
- **Data processing guidelines**
- **Auditing**
- **Compliance**
- **Maintenance and development of the Code of Practice**
- **Governance of COUNTER**

COUNTER: current Codes of Practice

1) Journals and databases

- Release 1 Code of Practice launched January 2003
- Release 2 published April 2005 replacing Release 1 in January 2006
 - Now a widely adopted standard by publishers and librarians
 - 100+ vendors now compliant
 - 15000+ journals now covered
 - Librarians use it in collection development decisions
 - Publishers use it in marketing to prove 'value'
- Draft Release 3 published March 2008

2) Books and reference works

- Release 1 Code of Practice launched March 2006
- 11 vendors now compliant
- Relevant usage metrics less clear than for journals
- Different issues than for journals
 - Direct comparisons between books less relevant
 - Understanding how different categories of book are used is more relevant

COUNTER: deriving metrics from Journal Report 1

- **Local metrics**
 - For libraries and library consortia
 - At journal, collection and publisher level
 - To compare the cost-effectiveness of journal subscriptions
 - To assess the value of Big Deals
- **Global metrics**
 - For authors, funding agencies, libraries and publishers
 - At journal, collection and publisher level
 - To compare quality and value

COUNTER: Future challenges

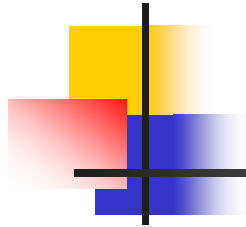
- Improving/extending the Codes of Practice
 - Reliability (audit, federated searches,)
 - Usability (number of compliant vendors, XML format, additional usage reports)
 - Additional data (year of publication, individual article usage data)
 - Usage statistics for Institutional Repositories
 - Categories of content/activity
 - Online publications are more than collections of articles
 - How to reflect the value provided by other features
- Deriving metrics from the Codes of Practice
 - Journals (cost per use, Usage Factor)
 - Databases?
 - Books?



SUSHI: an introduction

Dr Peter T Shepherd
Director
COUNTER
July 2008

SUSHI



- Standardized Usage Statistics Harvesting Initiative (SUSHI)
 - No mechanism existed for automatically retrieving, combining, and storing COUNTER usage data from different sources
 - NISO-sponsored XML-based SUSHI provides a means to do just this, via a standard model for machine to machine automation of statistics harvesting.
 - COUNTER and NISO have worked together to develop the SUSHI protocol. More details of SUSHI can be found at:-

http://www.niso.org/committees/SUSHI/SUSHI_comm.html



SUSHI: Objectives

- COUNTER statistics provides an excellent model and rules for usage statistics counting
- Librarians needed:
 - ***A more efficient data exchange model***
 - Current model is file-by-file spreadsheet download
 - Background query and response model is more efficient and scalable



SUSHI: What it is and Isn't

- What it is:
 - A web-services model for requesting data
 - Replaces the user's need to download files from vendor's website
 - A request for data where the response includes COUNTER data
 - Using COUNTER's schema
- What it isn't:
 - A model for counting usage statistics
 - A usage consolidation application



Why COUNTER and SUSHI are important

- For libraries and publishers
 - Usage statistics are being used to inform decisions
 - They need to be consistent, credible and comparable = **COUNTER**
 - And, easy to obtain = **SUSHI**



Summary

- **COUNTER** provides the consistency and credibility
- **ERM Systems/Usage Consolidation** service provide the tools for more effective consolidation and reporting of usage data
- **SUSHI** acts as an enabling technology by allowing Usage Consolidation modules to automate the harvesting of COUNTER reports
- **Release 3 of COUNTER Codes of Practice**, will turn the theory and promise of these systems into reality by making make SUSHI support a requirement for compliance.