



BioOne Complete/ScholarlyIQ

Guide to – COUNTER Release 5 Reporting

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BioOne COUNTER 5 Portal Overview

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1. About COUNTER Release 5¹

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](#).

There are several different types of usage metrics in Release 5, which breakdown 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).

A. Metrics

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. articles) investigated by a user.
- ‘Unique_Title_Investigations’: the number of unique titles (e.g. journals) 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. articles) requested by a user.
- ‘Unique_Title_Requests’: the number of unique titles requested by a user.

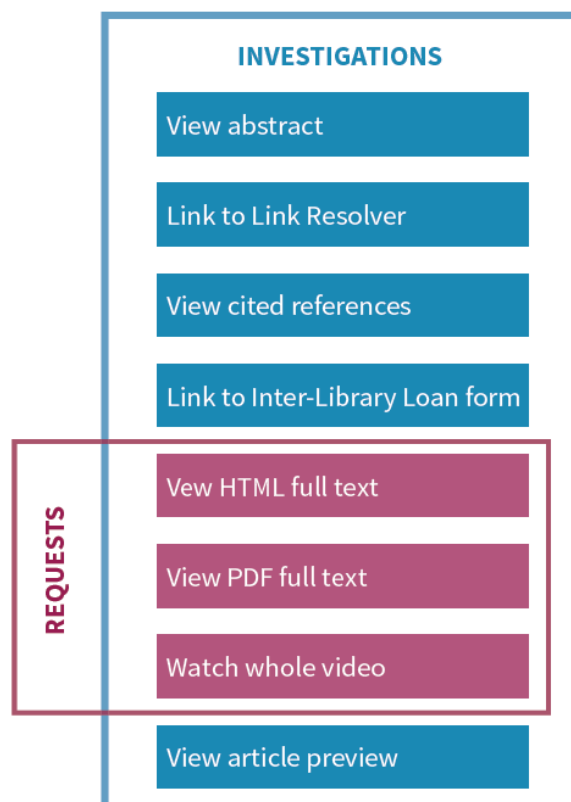


Figure 1: The relationship between “Investigations” and “Requests”

¹ About COUNTER Release 5 content sourced from The Friendly Guide to Release 5 for Librarians, Tasha Mellins-Cohen, (Project COUNTER, 2018)

Access Denials

Access denials are sometimes known as turnaways. Two varieties of access denial metrics 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.

Searches

There are four different types of search metrics 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.

B. Attributes and Parameters

Release 5 of the COUNTER Code of Practice has added a series of elements and attributes to COUNTER’s 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](#).

2. Report Types

A. COUNTER 5 reports

Three sets of reports are available through the SIQ reporting portal: COUNTER 5 Master Reports (for 2019 usage data), COUNTER 5 Standard Reports (for 2019 usage data) and COUNTER 4 Reports (for 2017, 2018, and Jan- Apr 2019 data). Each set of reports includes different data and have different features. This support document outlines the process for pulling and customizing these reports through the SIQ Database.

Master Reports

Release 5 of the COUNTER Code of Practice (referred to as COUNTER 5) includes four Master Reports covering a very wide spectrum of activities and are highly dynamic:

Report ID	Name	Description
PR	Platform Master Report	A customizable report summarizing activity across a content provider’s platforms that allows the user to apply filters and select other configuration options.
DR	Database Master Report	A customizable report detailing activity by database that allows the user to apply filters and select other configuration options.
TR	Title Master Report	A customizable report detailing activity at the title level (journal, book, etc.) that allows the user to apply filters and select other configuration options.
IR	Item Master Report	A granular, customizable report showing activity at the level of the item (article, chapter, media object, etc.) that allows the user to apply filters and select other configuration options.

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.

Standard Reports

The COUNTER 5 standard reports are:

Report ID	Name	Description
PR_P1	Platform Usage	A Standard View of the Platform Master Report offering platform-level usage summarized by metric type.
DR_D1	Database Search and Item Usage	Reports on key Searches, Investigations and Requests metrics needed to evaluate a database.
DR_D2	Database Access_Denied	Reports on Access Denied activity for databases where users were denied access because simultaneous-use licenses were exceeded or their institution did not have a license for the database.
TR_B1	Book Requests (Excluding "OA_Gold")	Full-text activity for non-open access books. The "Unique_Title_Requests" provides comparable usage across book platforms. The "Total_Item_Requests" shows overall activity; however, numbers between sites will vary based on how the content is delivered (e.g. delivered as a complete book or by chapter).
TR_B2	Book Access Denied	"Access Denied" activity for books where users were denied access because licences were exceeded or the institution did not license the book.
TR_B3	Book Usage by Access Type	Book usage showing all applicable metric types broken down by "Access_Type".
TR_J1	Journal Requests (Excluding "OA_Gold")	Usage of non-Open Access Gold journal content. "Unique_Item_Requests" provides comparable usage across journal platform by reducing the inflationary effect that occurs when and HTML full text automatically displays and then access the PDF version. "Total_Item_Requests" shows overall activity.
TR_J2	Journal Access Denied	"Access Denied" activity for journal content where users were denied access because licences were exceeded or their institution did not license the title.
TR_J3	Journal Usage by Access Type	Reports on usage of journal content for all metric types broken down by "Access_Type".
TR_J4	Journal Requests by YOP (Excluding "OA_GOLD")	Breaks down the usage of non-Open Access Gold journal content by year of publication, providing counts for the "Metric Types"; "Total_Item_Requests" and "Unique_Item_Requests". Provides details necessary to analyze usage of Backfiles or content covered by perpetual-access agreement.
IR_A1	Journal Article Requests	Reports on journal article requests at the article level. This report is limited to content with a data type of "Journal"; section type of "Article", and metric type of "Total_Item_Requests" and "Unique_Item_Requests".
IR_M1	Multimedia Item Requests	Reports on multimedia requests at the "Item" level.

B. COUNTER 4 Reports

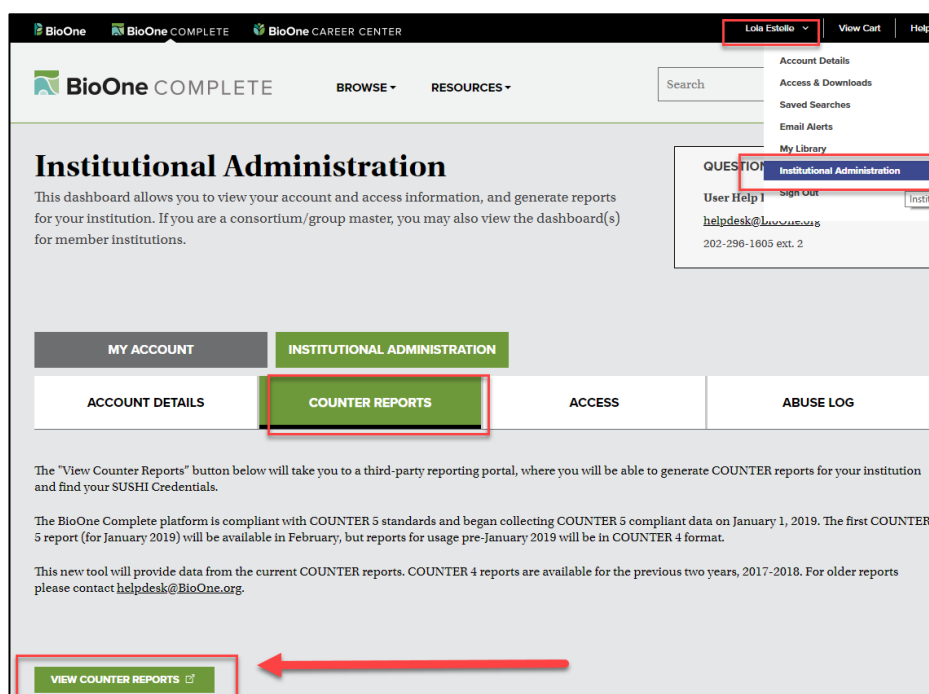
2018, 2017, and Jan-Apr 2019 data is available in COUNTER 4 format. The following COUNTER 4 reports are available through SIQ:

Report	Description
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 2	Access Denied to Full-Text Articles by Month, Journal and Category
Journal Report 3	Number of Successful Item Requests by Month, Journal and Page-type
Journal Report 3 Plus	Number of Successful Item Requests by Month, Journal and Page-type, including usage for mobile devices. Also includes turnaways.
Journal Report 3 Mobile	Number of Successful Item Requests by Month, Journal and Page-type for usage on a mobile device
Journal Report 5	Number of Successful Full-Text Article Requests by Year-of-Publication (YOP) and Journal
Book Report 2	Number of Successful Section Requests by Month and Title
Book Report 3	Access Denied to Content Items by Month, Title and Category
Book Report 3 Plus	Access Denied to Content Items by Month, Title and Category, including attempts made on mobile devices.
Platform Report 1	Total Searches, Result Clicks and Record Views by Month and Platform
Title Report 1	Number of Successful Requests for Journal Full-Text Articles and Book Sections by Month and Title
Title Report 1 Mobile	Number of Successful Requests for Journal Full-Text Articles and Book Sections by Month and Title (formatted for normal browsers/delivered to mobile devices AND formatted for mobile devices/delivered to mobile devices)
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

Title Report 3 Mobile	Number of Successful Item Requests by Month, Title and Page Type (formatted for normal browsers/delivered to mobile devices AND formatted for mobile devices/delivered to mobile devices)
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3. Accessing the SIQ Reporting Tool

To pull COUNTER reports, Log in at <https://bioone.org> and access the [Institutional Administration Dashboard](#). Once logged in, click the arrow next to your name in the black bar at the top of the screen. Select Institutional Administration from the drop down menu, and then navigate to the Counter Reports tab. Finally, click “VIEW COUNTER REPORTS.”

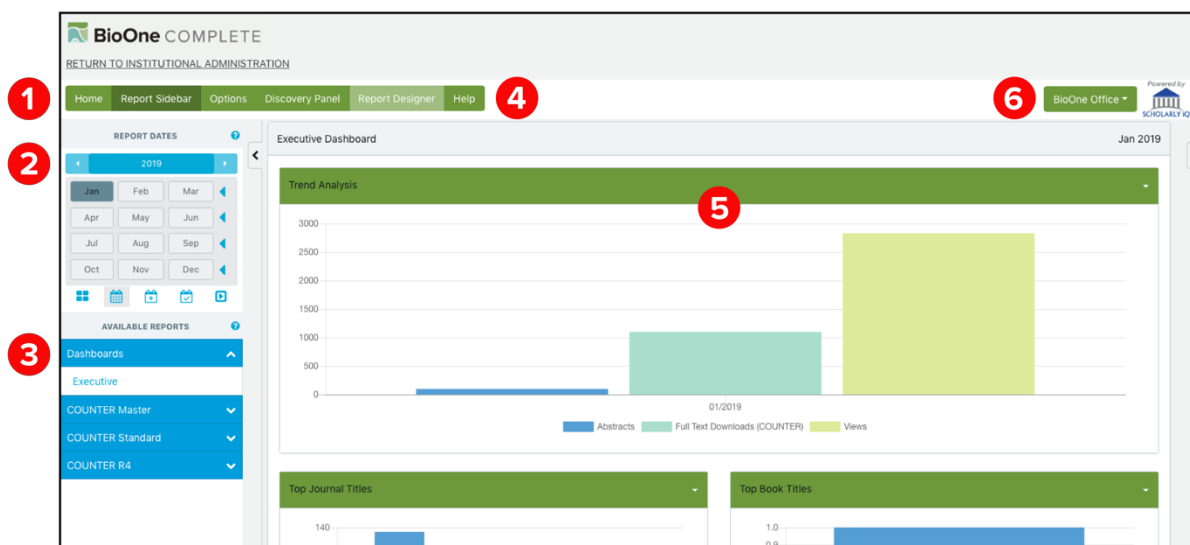


4. Navigating the Reporting Tool

The BioOne Complete COUNTER 5 portal provided by Scholarly iQ (www.scholarlyiq.com) is designed to be as user-friendly and intuitive as possible while remaining compliant to the latest COUNTER standards and guidelines.

Once logged in you will be presented the following page with an Executive Dashboard to visualise key usage data.

A. The SIQ Dashboard



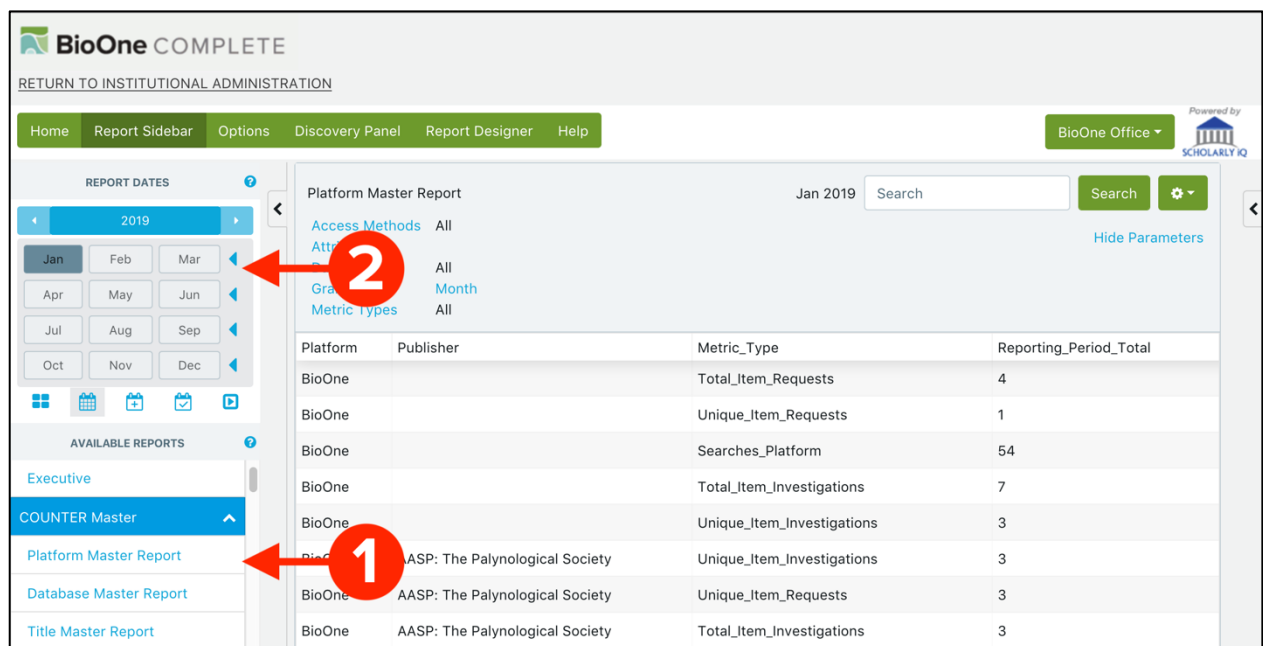
The primary features of the dashboard include:

1. **Report Toolbar** - the toolbar contains buttons which allow you to expand/collapse sidebars, change options, access help, and perform actions on your account such as SUSHI registration.
 - a. **Home** - Click the **Home** button to return to the main page of the application.
 - b. **Report Sidebar** - Click the **Report Sidebar** to expand or collapse the left sidebar.
 - c. **Options** - Click the **Options** button to customise your preferences such as Rows Per Page and Chart Engine.
 - d. **Discovery Panel** - Click the **Discovery Panel** button to expand or collapse the right sidebar. The Discovery Panel allows you to add and remove filters, attributes, and metrics when a COUNTER 5 Master report is displayed.
 - e. **Report Designer** - Click the Report Designer button to change report parameters when a COUNTER 5 Master report is displayed.
2. **Calendar** - The calendar control allows you to apply date ranges to the active report.
3. **Available Reports** - This area lists the reports that are enabled for your account. Reports are grouped by category (COUNTER 5 Master Reports, COUNTER 5 Standard Reports, and COUNTER R4 Reports) and clicking a report will display it with the active date range set in the calendar.
4. **Help Widget** - The Help Widget can be selected from **Help** in the Report Toolbar or under Account Name to guide you through reporting steps and using the portal. Additionally, click on the small blue question mark sign that appears near headings for a brief explanation of what that section is.

5. **Dashboard and Report Screen** – Displays the requested reports, data tables and charts.
6. **Customer Name** – Displays your institution’s name and includes a dropdown menu with links for Select Account, Help, SUSHI, Version and Sign Out.

5. Running a Report

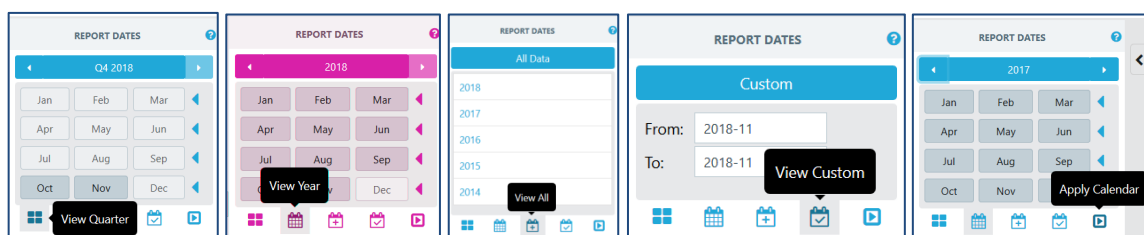
This section quickly covers how to pull a report. To run any report, first select the report type from the **Available Reports (1)** menu on the left side of the screen, and then use the **Calendar tool (2)** to select a date range.



The screenshot shows the BioOne COMPLETE interface. On the left, the 'AVAILABLE REPORTS' menu is visible, with 'Platform Master Report' highlighted by a red circle and arrow labeled '1'. The main area displays the 'Platform Master Report' for 'Jan 2019'. Above the report table is a 'REPORT DATES' section with a calendar tool, also highlighted by a red circle and arrow labeled '2'. The report table has the following data:

Platform	Publisher	Metric_Type	Reporting_Period_Total
BioOne		Total_Item_Requests	4
BioOne		Unique_Item_Requests	1
BioOne		Searches_Platform	54
BioOne		Total_Item_Investigations	7
BioOne		Unique_Item_Investigations	3
BioOne	AASP: The Palynological Society	Unique_Item_Investigations	3
BioOne	AASP: The Palynological Society	Unique_Item_Requests	3
BioOne	AASP: The Palynological Society	Total_Item_Investigations	3

Use the Calendar tool to select a date range for the report. Selecting date ranges from the Calendar control will apply the requested date range to the active report.



From left to right: "

- **Usage by Quarter** – Choose this option to select a whole quarter.
- **By Month** – Select individual months by choosing the year, and then the month. Select a quarter by using the small blue arrow at the end of each row. You can also select more than one month by holding down Shift while choosing.

- **By Year** – Choose a whole year to pull usage data for.
- **Custom** – Enter a specific date range you wish to pull data for.
- **Apply Range** – Click here to apply your selected date range to the active report.

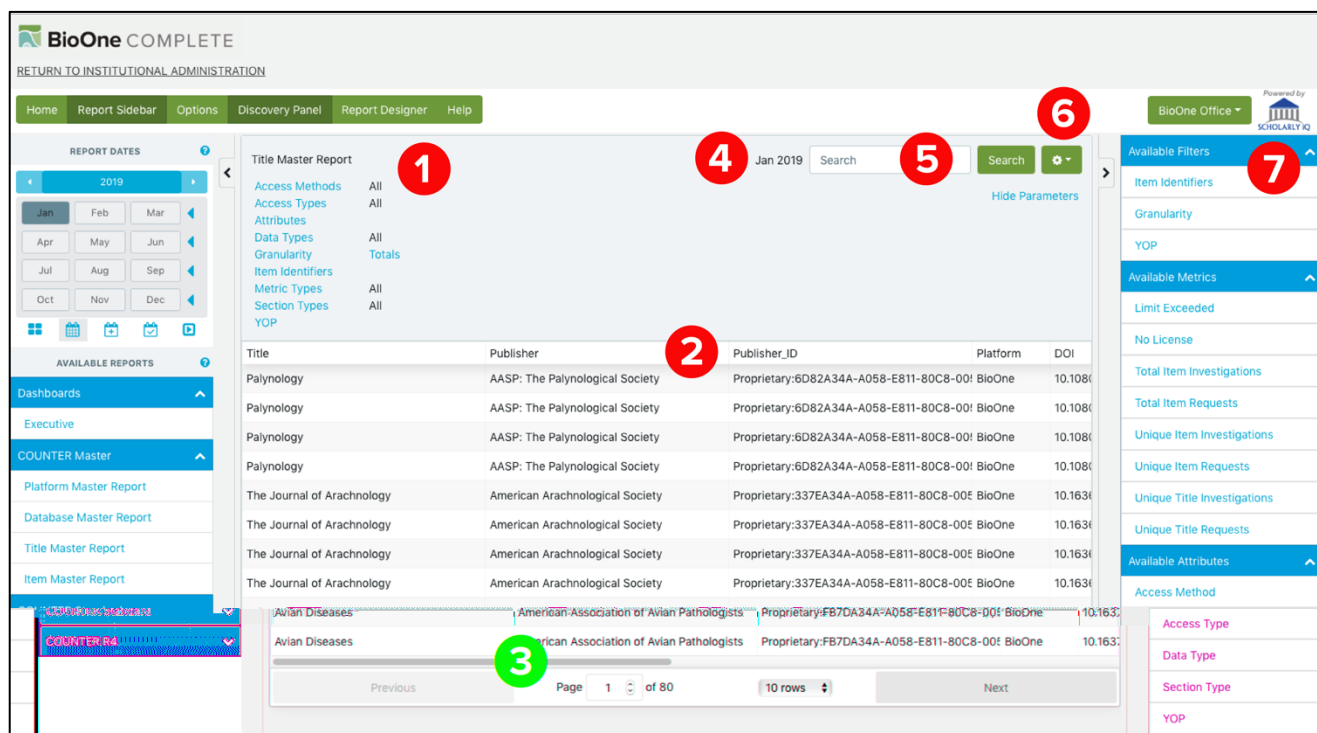
The report will appear in the table in the center of the screen. Please note that COUNTER 5 Master and Standard Reports are only for 2019 data. To pull 2018 and 2017 usage data, please use the COUNTER 4 reports.

Each report has different features and levels of flexibility:

- Dashboards contain single page overviews of report data,
- COUNTER Master reports can be dynamically filtered and changed.
- COUNTER Standard reports are pre-configured and cannot be dynamically changed.

A. Basic Report Features

When a report is requested the following additional options are presented to the user. Please note that each feature may not be available for every report:



The screenshot displays the BioOne COMPLETE interface with several features highlighted by red circles:

- 1**: Report configuration options (Access Methods, Access Types, Attributes, Data Types, Granularity, Item Identifiers, Metric Types, Section Types, YOP).
- 2**: Report table with columns: Title, Publisher, Publisher_ID, Platform, DOI.
- 3**: Report pagination (Page 1 of 80, 10 rows).
- 4**: Date selection (Jan 2019).
- 5**: Search field.
- 6**: Report Designer button.
- 7**: Available Filters (Item Identifiers, Granularity, YOP).

The additional features displayed within a report include:

1. **Report configuration** – This area allows you to select/deselect report attributes and metrics (COUNTER 5 Master Reports only).

2. **Report details** – This is where the requested report data is displayed. Note that you can sort the data in any column in ascending (click once) or descending order (click twice) by clicking on that column’s header. You can also drag and drop the column headers to rearrange the format of the data. In COUNTER 5 Master reports, you can remove a column by dragging the column’s header into the Report Configuration area.
3. **Report navigation** – Navigate through the report table and the change number of rows displayed.
4. **Date** – The date range of active report.
5. **Search** – Search for specific line items such as the title of a journal or publisher name.
6. **Export** – Export the data in the report as a CSV.
7. **Filters, Metrics, and Attributes** – View and toggle specific reporting parameters to customize your report. **Please note: these are only available in the COUNTER 5 Master Reports.**

6. Running a COUNTER 5 Master Report

COUNTER 5 Master reports are designed to be able to show all available COUNTER metrics and attributes, and for these to be dynamically filtered and changed.

In these reports, you can:

- Add/remove filters and attributes as needed;
- User the Report Designer Tab to easily customize the parameters and format of a report;
- Remove unwanted columns by dragging the column header up;
- And more.

A. Report Configuration

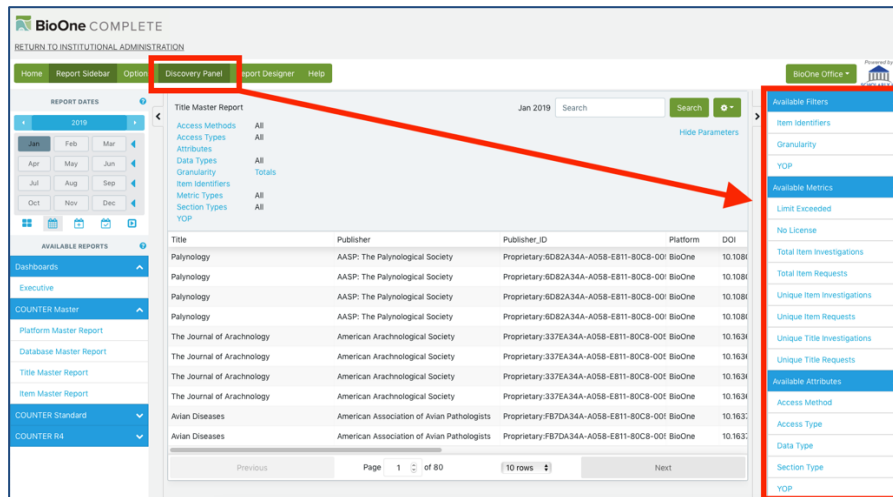
The current report configuration is visible at the top of the Master Report. Clicking on an attribute allows you to edit or change which attributes and metrics are displayed in the report.

Clicking on available attributes or metrics allows you to add or remove which attributes or metrics are included.

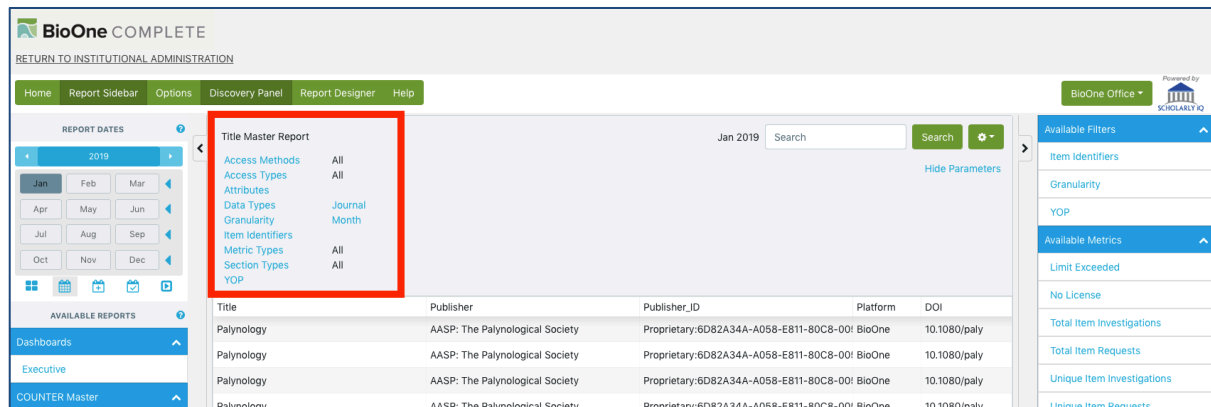
When all the desired attributes and metrics are selected, select **Run Report** to re-generate the report according to your newly applied parameters..

B. Discovery Panel

Clicking the **Discovery Panel** button in the top toolbar expands or collapses the right sidebar. The **Discovery Panel** allows you to add and remove filters, attributes, and metrics when a COUNTER 5 Master report is displayed.



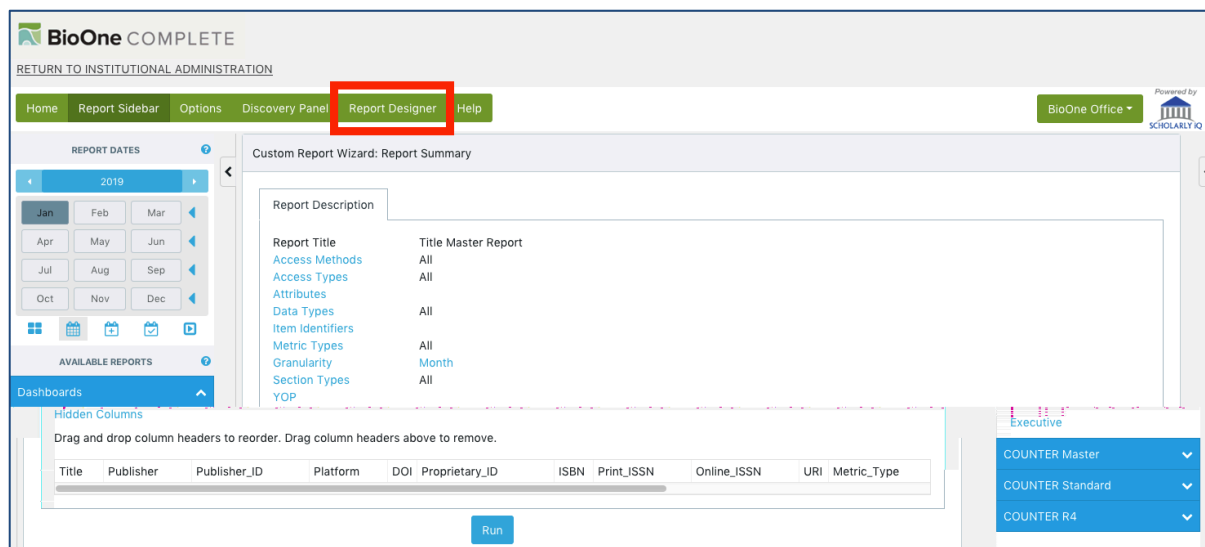
Selecting (or dragging and dropping) attributes and metrics will add them to the selected Master report. You will then be able to re-generate the report.



Click on an attribute in the report configuration area to remove it. Once clicked, the attribute will disappear.

C. Report Designer

The **Report Designer** also allows you to change report parameters when a report is displayed by opening a Report Description. Click on **Report Designer**, visible in the Report Toolbar at the top of the screen.

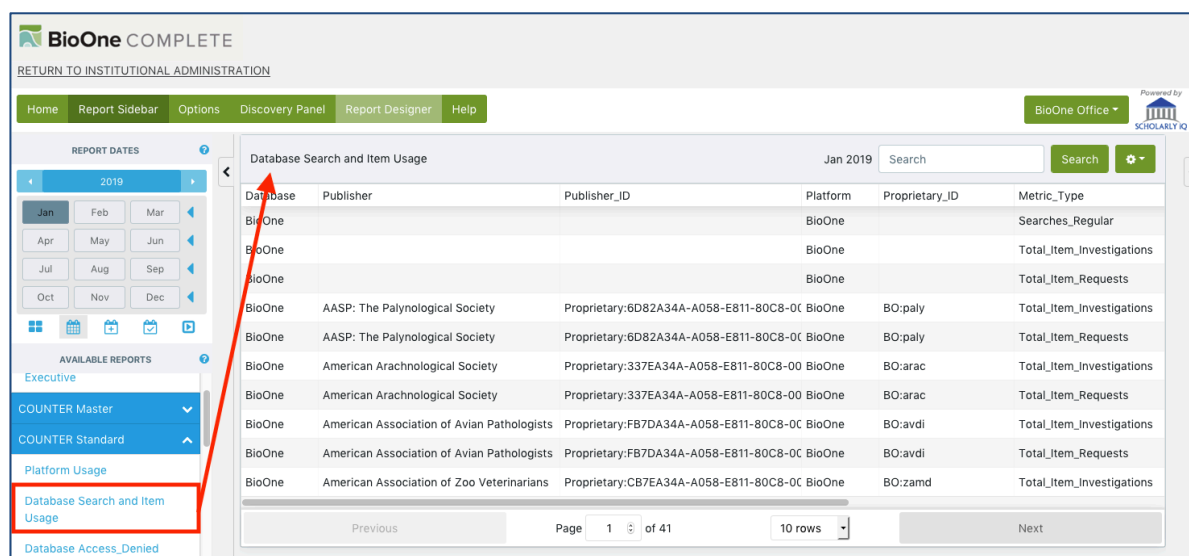


This displays the Report Description. The Report Description can be edited by selecting desired attributes or parameters from within the Report Designer. Additionally, you can reorganize the layout of the report by dragging and dropping the column headers displayed at the bottom of the Report Description.

Click **Run Report** when you are ready to generate the report.

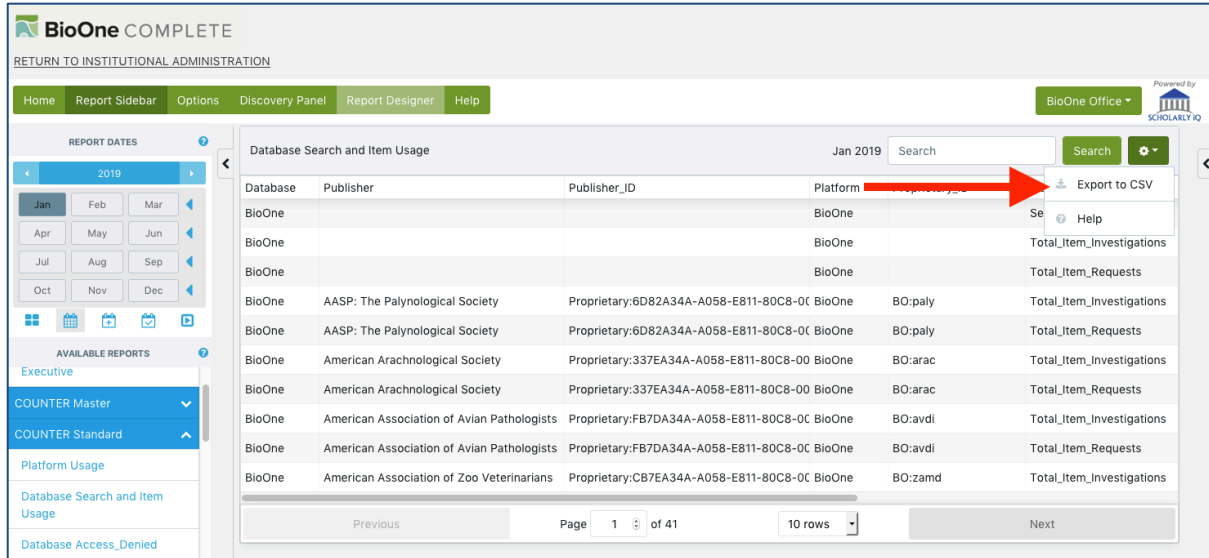
7. Running a COUNTER 5 Standard Report

Selecting a COUNTER 5 Standard report from the Available Reports list will generate a pre-configured COUNTER compliant version of that standard report. COUNTER 5 Standard reports are fixed and cannot be changed like the COUNTER 5 Master Reports (covered above). As such, no filters or attributes can be added/removed, no Report Description is visible, and the Report Designer feature is unavailable. As such, follow the steps outlined in Section 5, **Running a Report**.



8. Exporting and Saving Data

Data from any report can be exported to CSV and saved locally. To export a report in COUNTER-compliant format, set up and run the report you wish to export. When the report has finished loading, click on the cog wheel icon in the upper right corner. Select **Export to CSV** from the dropdown menu that appears.



The screenshot shows the BioOne COMPLETE interface. The main content area displays a table titled "Database Search and Item Usage" for January 2019. The table has columns for Database, Publisher, Publisher_ID, Platform, and various metrics. A red arrow points to the "Export to CSV" option in the dropdown menu of the cog wheel icon in the upper right corner of the report area.

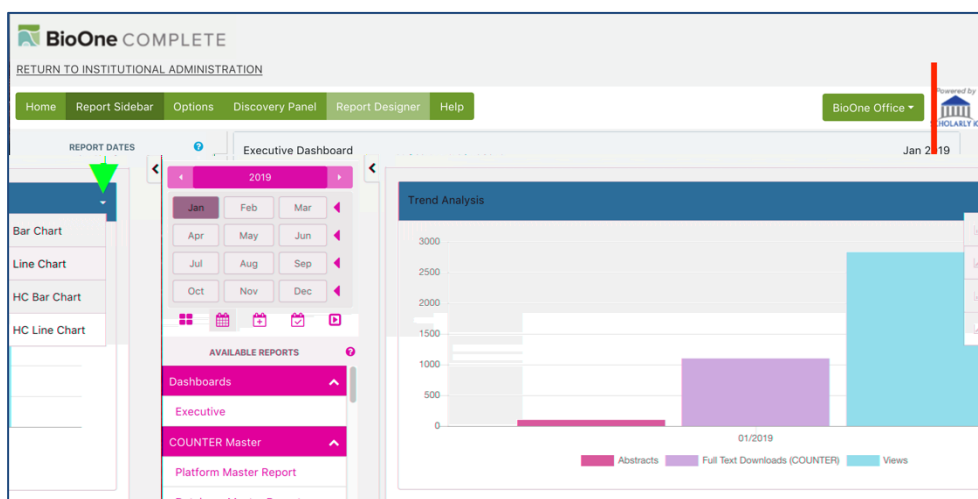
The report will be downloaded in COUNTER compliant format.

A	B	C	D	E	F	G	H	I
1	Report_Nam Database Search and Item Usage							
2	Report_ID DR_D1							
3	Release	5						
4	Institution_N BioOne Office							
5	Institution_ID BO:49ES8068-A058-E811-80C8-00505689C586							
6	Metric_Type Searches_Automated;Searches_Federated;Searches_Regular;Total_Item_Investigations;Total_Item_Requests							
7	Report_Filter Access_Method=Regular							
8	Report_Attributes							
9	Exceptions							
10	Reporting_Period Begin_Date=2019-01-01; End_Date=2019-01-31							
11	Created 2019-02-13T13:43:01Z							
12	Created_By Scholarly IQ							
13								
14	Database Publisher	Publisher_ID	Platform	Proprietary	Metric_Type	Reporting_Period	Jan-19	
15	BioOne		BioOne		Searches_Re		54	54
16	BioOne		BioOne		Total_Item_I		30	30
17	BioOne		BioOne		Total_Item_I		4	4
18	BioOne AASP: The Palynological Society	Proprietary:6D82A34A-A058-E811-80C8-00505689C586	BioOne	BO:paly	Total_Item_I		4	4
19	BioOne AASP: The Palynological Society	Proprietary:6D82A34A-A058-E811-80C8-00505689C586	BioOne	BO:paly	Total_Item_I		3	3
20	BioOne American Arachnological Society	Proprietary:337EA34A-A058-E811-80C8-00505689C586	BioOne	BO:arac	Total_Item_I		34	34
21	BioOne American Arachnological Society	Proprietary:337EA34A-A058-E811-80C8-00505689C586	BioOne	BO:arac	Total_Item_I		28	28
22	BioOne American Association of Avian Pathologists	Proprietary:FB7DA34A-A058-E811-80C8-00505689C586	BioOne	BO:avdi	Total_Item_I		9	9
23	BioOne American Association of Avian Pathologists	Proprietary:FB7DA34A-A058-E811-80C8-00505689C586	BioOne	BO:avdi	Total_Item_I		6	6
24	BioOne American Association of Zoo Veterinarians	Proprietary:CB7EA34A-A058-E811-80C8-00505689C586	BioOne	BO:zamd	Total_Item_I		10	10
25	BioOne American Association of Zoo Veterinarians	Proprietary:CB7EA34A-A058-E811-80C8-00505689C586	BioOne	BO:zamd	Total_Item_I		5	5
26	BioOne American Fisheries Society	Proprietary:8CAE9E50-A058-E811-80C8-00505689C586	BioOne	BO:fidm	Total_Item_I		8	8
27	BioOne American Fisheries Society	Proprietary:8CAE9E50-A058-E811-80C8-00505689C586	BioOne	BO:fidm	Total_Item_I		3	3
28	BioOne American Institute of Biological Sciences	Proprietary:257EA34A-A058-E811-80C8-00505689C586	BioOne	BO:bisl	Total_Item_I		2	2

9. Customizing Charts

The SIQ COUNTER 5 portal includes a number of additional user-friendly features to make data visualization easier. From the Executive Dashboard (visible in the **Available Reports** menu under **Dashboards**) you can view various charts displaying your institution's COUNTER 5 usage data in various ways.

You can easily change the chart type by clicking on the small white arrow in the chart's header, and then selecting the desired chart format from the drop down menu.



10. SUSHI

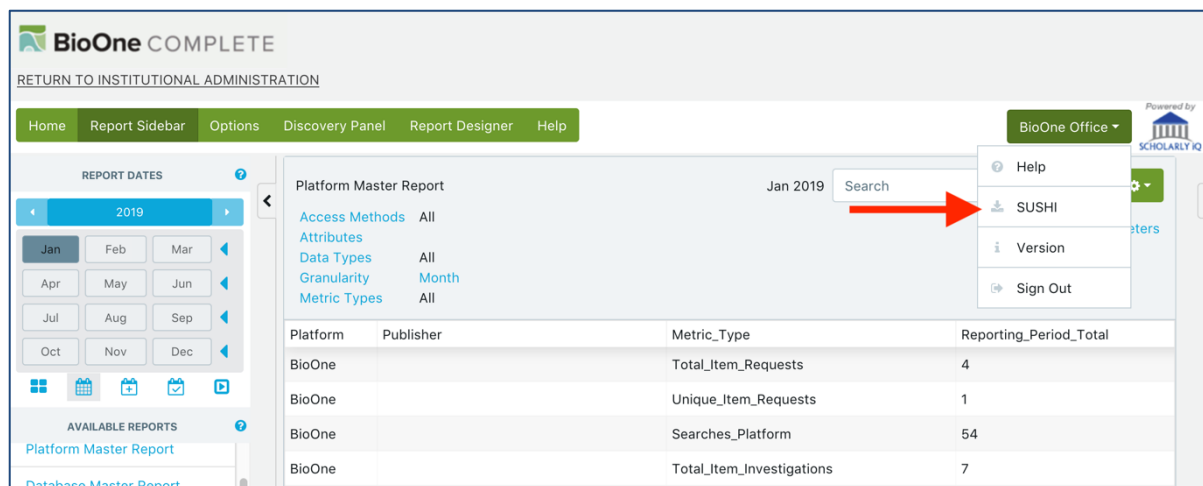
The Standardized Usage Statistics Harvesting Initiative (SUSHI) protocol is an automated request and response model for harvesting usage data.

To access your COUNTER 5 compliant reports from BioOne, simply follow these 5 easy steps to retrieve your SUSHI access credentials. With these, you can begin harvesting usage reports using your preferred SUSHI ERM tool.

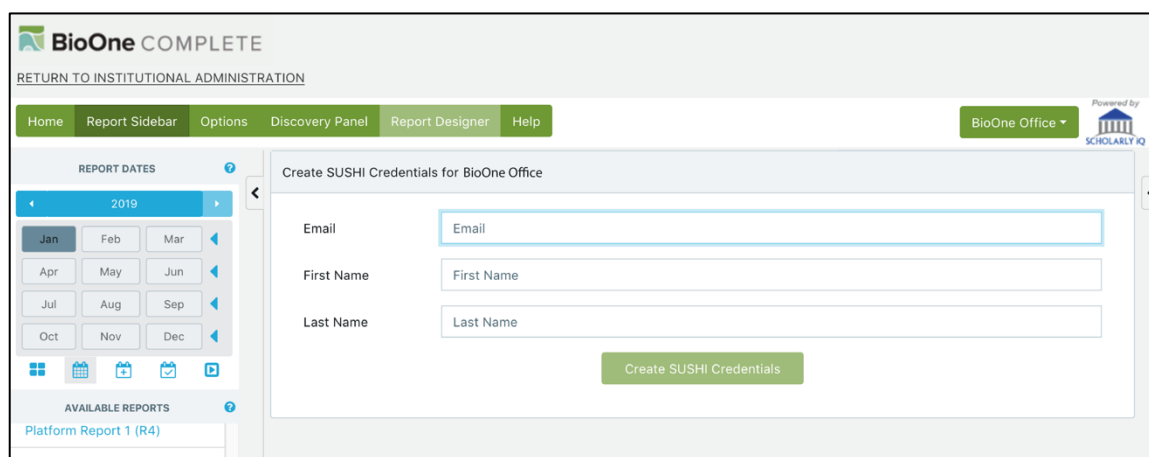
The BioOne SUSHI web service is available 24 hours per day, 7 days a week. If you need assistance beyond the self-service SUSHI activation process, please contact the BioOne Help Desk (helpdesk@BioOne.org) for further assistance.

To access your SUSHI credentials, follow these steps:

1. Log into your account and visit your [Institutional Administration Dashboard](#). Navigate to the Counter Reports tab and click "VIEW COUNTER REPORTS". This will direct you to the COUNTER reporting portal.
2. Click on your institution's name (visible in the upper right corner) and select **SUSHI** from the dropdown menu.



3. This will take you to the SUSHI registration page.



4. You will then be presented with your SUSHI credentials. They will also be emailed to you.

The required SUSHI account credentials for your institution will include a **Requestor ID** and an **Institution ID/Customer ID**.

You may also download a list of the authorized COUNTER reports supported by BioOne.

Note: If you haven't set up your SUSHI credentials, enter your email, first name, and last name/family name. Click **Create SUSHI Credentials**.

5. To then access the BioOne SUSHI web service, simply point your own SUSHI client or access software to the following service URL:

<https://sushi5.scholarlyiq.com/counter/r5>.

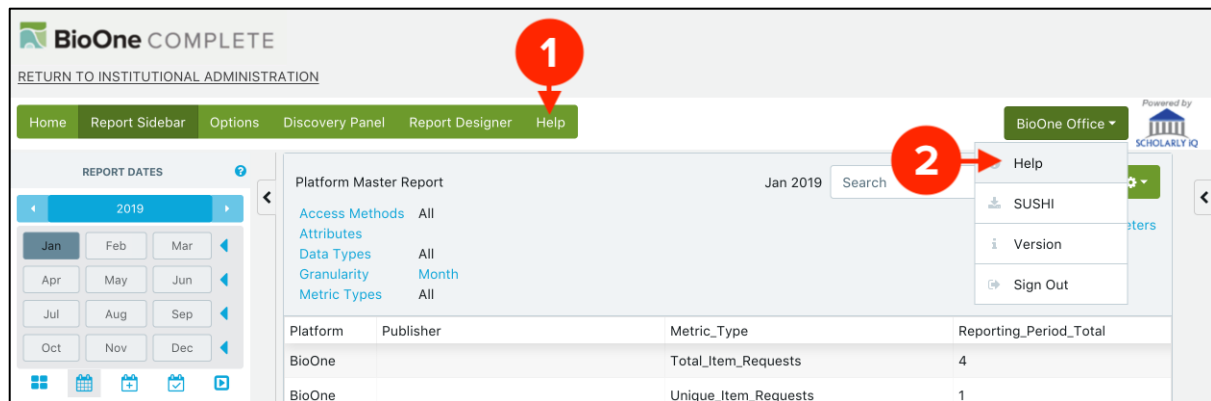
6. Your SUSHI Client application's "ReportRequest" will require the supplied Requestor ID, Institution ID (Customer Reference) as well as The Report Type, the Report Version (3) and the Usage ranges you want to harvest.

Please refer to COUNTER for further information on harvesting.
<https://www.projectcounter.org/code-of-practice-five-sections/8-sushi-automated-report-harvesting/>

11. Help

A. In-portal help

Help materials, including the **Help Widget** are available within the reporting portal. Help is available from the Help button in the top toolbar (1) or from the dropdown when you click on your account name (2).



B. BioOne Help Desk

For most direct support issues please contact BioOne User Help Desk as follows:

Help Desk:
helpdesk@BioOne.org
 202-296-1605 ext. 2

C. Scholarly iQ

For technical portal and SUSHI support issues please contact support@scholarlyiq.com.