Beyond Vendor Solutions: Homegrown COUNTER Usage Statistics Reports and Analysis

Zorian M Sasyk
Electronic Access/UX Librarian
Minnesota State University, Mankato
ER Usage Statistics 101

- COUNTER
  - JR1 (Journals)
  - DB1 (Databases)
  - BR1/BR2 (ebooks)

- Non-COUNTER

- SUSHI protocol (for automated retrieval)
Vendor options vs. DIY

Pros
- Usually involve SUSHI retrieval and *hopefully* acquisitions data integration
- Saves time spent otherwise manually retrieving usage reports
- Enables some reporting and visuals

Cons
- $$$
- Still have to configure SUSHI accounts for EVERY vendor
- Sometimes, still have to retrieve usage reports manually and upload
- Acquisitions integration is not always reliable, especially in a “mixed” shop
- Available report options often not adequate or customizable
Homegrown Usage Reports: Some assembly required

- COUNTER reports
- Acquisitions cost data (ILS, Vendor Pricelist, etc.)
- Package titlelist (for Big Deal journal packages)

**ALL** of these will come in the form of spreadsheets (.xlsx, .csv, .tsv, KBART)
<table>
<thead>
<tr>
<th>Package Title List</th>
<th>Vendor Pricelist</th>
</tr>
</thead>
<tbody>
<tr>
<td>JR1</td>
<td></td>
</tr>
</tbody>
</table>
Database reports

- Ebsco, ProQuest, Gale

- COUNTER reports (DB1s) are NOT that useful

- Non-COUNTER reports contain full-text download statistics

FULL-TEXT DOWNLOADS ARE GOLD!!!!!
Journal Package Reports

- Elsevier ScienceDirect, Sage Premier, society packages like American Physical Society
- COUNTER JR1 reports for multiple years (ex. 2014-2016)
- Utilize cost data from a generic publisher titlelist, not from ILS
  - Looking at what cost-per-use would be if subscribing to journals individually instead of in a “Big Deal”
  - These lists can often be found on publisher sites or through an internet search
- Utilize a list of what journal titles your library is entitled to in the package in the given year
Excel Formulas: VLOOKUP and IFERROR

- **VLOOKUP** – allows you to look for the value of a cell (i.e., Title X in A2) in a column or array (multiple columns) such as B:D; if a match is found, it will print the value from the column specified (NOT NECESSARILY THE VALUE MATCHED)
  - Allows us to take a JR1 and a pricelist, look for matches between the two utilizing ISSN as a matchpoint, and produce a JR1 list of title usage with cost added into it.
- **IFERROR** – allows you to utilize multiple VLOOKUPs, allowing you to utilize multiple matchpoints.
  - If your first VLOOKUP utilizes a unique ID and doesn’t find a match, IFERROR gives you the chance to utilize a second VLOOKUP on ISSN or title.
=VLOOKUP(A2,'Ebsco Usage 2015'!A:D,4,FALSE) (From Ebsco_DatabaseUsage report spreadsheet)

- Looking for Academic Search Premier in the Ebsco Usage 2015 tab in column array A-D. If a match is found, return the value found in the 4th column (D).
IFERROR

- \[=\text{IFERROR}(\text{VLOOKUP}(B2,'Sage \text{ Jr} 1 \ 2013'!D:R,15,FALSE),\text{IFERROR}(\text{VLOOKUP}(C2,'Sage \text{ Jr} 1 \ 2013'!E:R,14,FALSE),"No \ stats"))\](From Sage Premier report)

- If the first VLOOKUP checking for a match on the Sage JR1 2013 tab does NOT find a match via Print ISSN column, do another VLOOKUP for a match in the Online ISSN column. If the second VLOOKUP does NOT find a match, do another VLOOKUP in the title column. If no match is found, print “No stats”.
Extras

- Conditional formatting
  - Graphical visualization of which titles have high or low usage or CPU

- Pivot tables
  - Depending on extra information provided in base titlelist, you can show usage by journal subject (see Sage Premier report as example)
# Sage Premier – Multi-year usage with conditional formatting

<table>
<thead>
<tr>
<th>SAGE Premier 2016 Titles (824)</th>
<th>2013 Usage</th>
<th>2014 Usage</th>
<th>2015 Usage</th>
<th>2016 Price</th>
<th>2015 CPU</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Current Bibliography on African Affairs</td>
<td>No stats</td>
<td>No stats</td>
<td>0</td>
<td>$593.00</td>
<td>Arts and Humanities</td>
<td></td>
</tr>
<tr>
<td>ADE in Practice</td>
<td>No stats</td>
<td>No stats</td>
<td>5</td>
<td>$424.00</td>
<td>Science, Technology and Medicine, Dis</td>
<td></td>
</tr>
<tr>
<td>Abstracts in Anthropology</td>
<td>No stats</td>
<td>No stats</td>
<td>9</td>
<td>$11,360.00</td>
<td>Arts and Humanities</td>
<td></td>
</tr>
<tr>
<td>Academic Pathology (OA)</td>
<td>No stats</td>
<td>No stats</td>
<td>No stats</td>
<td>No price match</td>
<td>No price match</td>
<td>Science, Technology and Medicine</td>
</tr>
<tr>
<td>Accounting History</td>
<td>3</td>
<td>19</td>
<td>9</td>
<td>$211.00</td>
<td>Business Management, Ac</td>
<td></td>
</tr>
<tr>
<td>Acts Sociologica</td>
<td>7</td>
<td>19</td>
<td>12</td>
<td>$831.00</td>
<td>Sociology, Se</td>
<td></td>
</tr>
<tr>
<td>Action Research</td>
<td>6</td>
<td>4</td>
<td>11</td>
<td>$895.00</td>
<td>Education, Se</td>
<td></td>
</tr>
<tr>
<td>Active Learning in Higher Education</td>
<td>31</td>
<td>65</td>
<td>42</td>
<td>$304.00</td>
<td>Education, Ts</td>
<td></td>
</tr>
<tr>
<td>Adaptive Behavior</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>$953.00</td>
<td>Science, Technology and Medicine, Se</td>
<td></td>
</tr>
<tr>
<td>Administration &amp; Society</td>
<td>26</td>
<td>49</td>
<td>38</td>
<td>$1,691.00</td>
<td>Sociology, Ps</td>
<td></td>
</tr>
<tr>
<td>Administrative Science Quarterly</td>
<td>14</td>
<td>7</td>
<td>16</td>
<td>$317.00</td>
<td>Business Management, Rs</td>
<td></td>
</tr>
<tr>
<td>Adoption &amp; Fostering</td>
<td>7</td>
<td>24</td>
<td>32</td>
<td>$554.00</td>
<td>Education, Cz</td>
<td></td>
</tr>
<tr>
<td>Adult Education Quarterly</td>
<td>27</td>
<td>41</td>
<td>19</td>
<td>$472.00</td>
<td>Education, Ed</td>
<td></td>
</tr>
<tr>
<td>Adult Learning</td>
<td>8</td>
<td>11</td>
<td>13</td>
<td>$386.00</td>
<td>Education, Ha</td>
<td></td>
</tr>
<tr>
<td>Advances in Dental Research</td>
<td>5</td>
<td>4</td>
<td>4</td>
<td>No price match</td>
<td>No price match</td>
<td>Science, Technology and Medicine, Dr</td>
</tr>
<tr>
<td>Advances in Developing Human Resources</td>
<td>15</td>
<td>33</td>
<td>41</td>
<td>$793.00</td>
<td>Business Management, Hs</td>
<td></td>
</tr>
<tr>
<td>Advances in Mechanical Engineering</td>
<td>No stats</td>
<td>No stats</td>
<td>No stats</td>
<td>No price match</td>
<td>No price match</td>
<td>Engineering and Materials Sciences, Ed</td>
</tr>
<tr>
<td>AERA Open</td>
<td>No stats</td>
<td>No stats</td>
<td>No stats</td>
<td>No price match</td>
<td>No price match</td>
<td>Education, Ed</td>
</tr>
<tr>
<td>Antlia</td>
<td>121</td>
<td>99</td>
<td>82</td>
<td>$4,170.00</td>
<td>Psychology, Ws</td>
<td></td>
</tr>
</tbody>
</table>
Sage Premier Pivot Chart – Usage by subject
Questions?

- Contact:

  Zorian M Sasyk
  Electronic Access/User Experience Librarian
  Zorian.sasyk@mnsu.edu