Using the ERM to Manage and Interpret E-journal Usage Statistics

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Tools for Managing and Analyzing Journal Usage Data

- Counter:
  - Counting online usage of networked electronic resources

- Sushi (NISO Z39.93):
  - Standardized usage statistics harvesting initiative

- ERM:
  - Electronic Resource Management

COUNTER

- (Counting Online Use of Networked Electronic Resources)
- Recording & Reporting online usage statistics
- Vendor Auditing for Compliance

What is COUNTER?

- Counting online usage of networked electronic resources.
- Launched in March 2002
- International initiative serving libraries, publishers, intermediaries by setting standards that facilitate the recording and reporting of online usage statistics.
- http://www.projectcounter.org

SUSHI

- (Standardized Usage Statistics Harvesting Initiative)
- An automated request and response model for the harvesting of electronic resource usage data utilizing a Web services framework

What is SUSHI?

- Defines an automated request and response model for the harvesting of electronic resource usage data utilizing a Web services framework
- Standard built on SOAP (Simple Object Access Protocol)
- It is intended to replace the time-consuming user-mediated collection of usage data reports
- Includes extension designed specifically to work with COUNTER reports

COUNTER Reports

- Book Reports (BR1, BR2, BR3, BR4, BR5, BR6)
- Journal Reports (JR1, JR1a, JR2, JR3, JR4, JR5)
- Database Reports (DB1, DB2, DB3)
- Consortium Reports (CR1, CR2)

http://www.niso.org/workrooms/sushi/reports

www.niso.org/workrooms/sushi
Statistics Consolidation in an ERM System

ERM and Sushi

Working with the SUSHI Harvester in Millennium ERM

Order information, the source of Cost data

Adding Contact Information
**ERM Autostat Configuration**

- **Contact ID**: [Contact ID]
- **Consortium Affiliation**: [Consortium Affiliation]
- **Day of Month**: [Day of Month]
- **Year**: [Year]
- **No. of months back**: [No. of months back]
- **ARES URL**: [https://ares.fit.istc.jrc.it/aresj_login]
- **Username ID**: [Username ID]
- **E-Resource Identifier**: [E-Resource Identifier]

**Autostat Elements – Access Provider**

**Autostat Table**

**Resource Record**

- **Access Provider**: [Access Provider]

**Contacts database**

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**Autostat elements – Customer ID**

**Customer ID’s are provided by the publisher of data provider, such as Scholarly Stats.**

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**Autostat Elements – Consortium Affiliation**

**Consortium Affiliation** is optional unless you have the consortium version or ERM.

**From the CSDIRECT FAQ**: Skip this step if you do not have the consortium version of ERM. If you use the consortium version, then input the same value that you set for your ERM login on the ERM tab of the Login Manager. The usage statistics for this library are stored separately. The system uses the correct coverage database for matching titles.

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**Autostat Elements – Date Fields**

**Day of Month**: The day of the month to retrieve statistics from the data provider. Use a number from 15 to 20 for Scholarly Stats. If you have many providers, break them up over several days to reduce system load.

**From (# of months back)**: How many months back from the current month to start collecting statistics. Note: Scholarly stats does not permit harvesting over year boundaries.

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**Harvesting a Previous Year**

Scholarly Stats does not allow harvesting over year boundaries. To harvest previous years (assuming the data is available from Scholarly Stats), specify the # of months from the current date back to the start date.
There are two options that can be enabled by Innovative that allow you to manually harvest a single resource and then view the log file to check for error messages.

Usage Data can (sometimes) be imported from files of J2K Counter usage data saved in XML formats.
Publishers are beginning to provide the option of saving in XML Format.

BUT... it does not always import due to differences in the XML structure.

Selected Publishers with XML Reports
- Ovid SP
- Oxford
- Palgrave
- American Chemical Society
- ProQuest
- Mary Ann Liebert

Converting Counter to XML
University of Nebraska – CSV to XML Conversion Tool

http://statsconverter4erm.unl.edu/

Order Records and ERM
- Cost per use information requires that order records are:
  - Order records may be attached to resource records
  - Order records may be related to resource records
Order Records and ERM

ERM requires data in the From and To fields listed on the order record payment tab to properly calculate cost per use information.

NOTE: From and to data can be imported when loading electronic invoices. (Manual page: 107636)

Resources

- UPENN SUSHI web client
  https://labs.library.upenn.edu/SushiWebClient/SushiCall
- NISO SUSHI website
  http://www.niso.org/workrooms/sushi
- SUSHI Server Registry
  http://sites.google.com/site/sushiserverregistry
- Project COUNTER website
  http://www.projectcounter.org/
- SUSHI Tools
  http://www.niso.org/workrooms/sushi/tools/
- CSV to XML
  http://statsconverter4erm.unl.edu/

Using the ERM to Manage and Interpret E-Journal Usage Statistics

Collection Development
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Why an ERM?

- A central place to manage information about electronic resources
- The ability to associate bibliographic and holdings records with resource and license information
- The ability to manage and analyze usage data
- The ability to load coverage data in conjunction with marc record load services (CASE or Serials Solutions) update holdings information in the catalog
Collecting prior to the ERM

- Downloaded provider by provider
  - Kept admin log in info on spreadsheets
  - Kept massive amounts of spreadsheets on network drive

Why do we collect?

- Library promotion and publicity
  - Effective Services
- User
  - Support
  - Demand
  - satisfaction
- Renewal decisions
- Budgeting/Funding
- Benchmarking
- Contribution to the national trends (ACRL)

Trends

- We can model trends in usage by looking at:
  - Cost of FT Download
  - CPU
  - What subjects cost more
  - What subjects use more
  - Use of print vs. e (and by subject)

Where we are right now

- Take the data that we have access to and analyze it for:
  - Subject area title and database use
  - Renewal
  - Budgeting
  - Special Projects
  - Serials Review

SUSHI and the ERM

- Cost Per Use report using the ERM & SUSHI
  - The library’s ERM sends the request via SOAP to the SUSHI server at the content providers site. The content provider processes the data and sends it back in XML format. The report shows up in your ERM as a spreadsheet report.
  - CPU Report gives more insight about usage and makes the usage picture clearer
Increase in E-journals with decrease in funding equals “Data-Driven Decision Making (DDDM)”

- Train Selectors on Statistics
- Integrating stats into Collection Development
- Determine Criteria
- Coincide projects with Renewals and Reviews
Collection Development

- Integration
  - Use with renewals
  - Serials Review
- General Analysis
- ERM/SUSHI Reports
- Detailed Provider Package Analysis
- Apply to databases and e-books

Empower Selectors

- Give them the tools to do their own analysis
  - Provide data in easy, comprehensive reports
  - Provide training on interpreting these tools/reports
  - Provide the above “deliberately”

Training or “InfoSessions”

- InfoSessions provided on a quarterly basis
- Follow a “brown bag” principle
- Explaining and interpreting statistics generally and building from there
- Exploding into a series!

Thank You

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