


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


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[www.niso.org/news/events/2010/erm](http://www.niso.org/news/events/2010/erm)




## 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




<h3>COUNTER</h3> <ul style="list-style-type: none"> <li>• (Counting Online Use of Networked Electronic Resources)</li> <li>• Recording &amp; Reporting online usage statistics</li> <li>• Vendor Auditing for Compliance</li> </ul>	<h3>SUSHI</h3> <ul style="list-style-type: none"> <li>• (Standardized Usage Statistics Harvesting Initiative)</li> <li>• An automated request and response model for the harvesting of electronic resource usage data utilizing a Web services framework</li> </ul>
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## 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>




## 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>




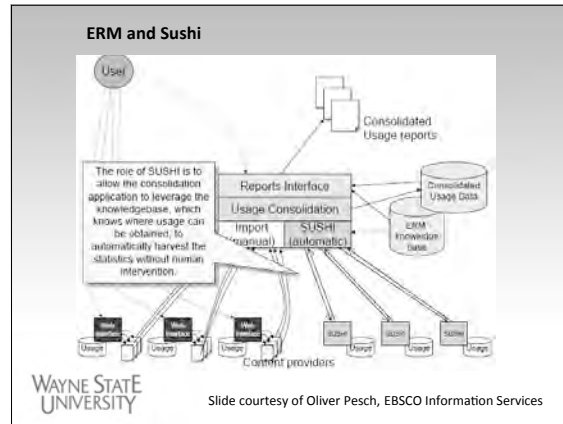
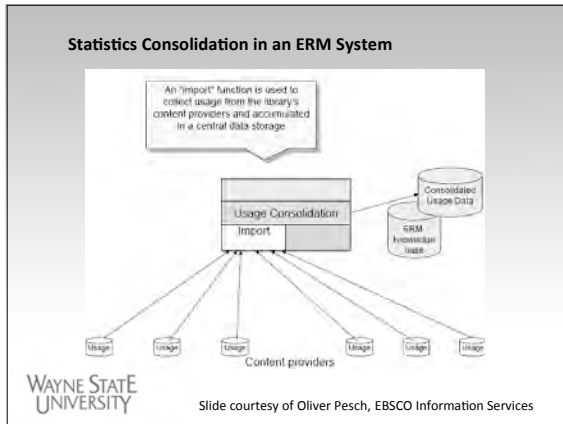
## What is SUSHI?



- 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
- ANSI/NISO Z39.93-2007

[www.niso.org/workrooms/sushi](http://www.niso.org/workrooms/sushi)





## ERM and Sushi Management

Working with the SUSHI Harvester in Millennium ERM

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### Setting up the ERM Knowledge Base

- Resource
- License

Resource ID	Last Updated	Created	Revisions
00000001	08-02-2009	08-02-2009	1
00000002	08-02-2009	08-02-2009	1
00000003	08-02-2009	08-02-2009	1
00000004	08-02-2009	08-02-2009	1
00000005	08-02-2009	08-02-2009	1
00000006	08-02-2009	08-02-2009	1
00000007	08-02-2009	08-02-2009	1
00000008	08-02-2009	08-02-2009	1
00000009	08-02-2009	08-02-2009	1
00000010	08-02-2009	08-02-2009	1

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### Order information, the source of Cost data

- Resource
- License
- Order

Resource ID	Last Updated	Created	Revisions
00000001	08-02-2009	08-02-2009	1
00000002	08-02-2009	08-02-2009	1
00000003	08-02-2009	08-02-2009	1
00000004	08-02-2009	08-02-2009	1
00000005	08-02-2009	08-02-2009	1
00000006	08-02-2009	08-02-2009	1
00000007	08-02-2009	08-02-2009	1
00000008	08-02-2009	08-02-2009	1
00000009	08-02-2009	08-02-2009	1
00000010	08-02-2009	08-02-2009	1

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### Adding Contact Information

- Resource
- License
- Order
- Contact

Resource ID	Last Updated	Created	Revisions
00000001	08-02-2009	08-02-2009	1
00000002	08-02-2009	08-02-2009	1
00000003	08-02-2009	08-02-2009	1
00000004	08-02-2009	08-02-2009	1
00000005	08-02-2009	08-02-2009	1
00000006	08-02-2009	08-02-2009	1
00000007	08-02-2009	08-02-2009	1
00000008	08-02-2009	08-02-2009	1
00000009	08-02-2009	08-02-2009	1
00000010	08-02-2009	08-02-2009	1

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### ERM Autostat Configuration

Access Provider	SS11003
Customer ID	SS11003-wayne80CLC
Consortium Affiliation	
Day of Month	17
From (# of months back)	3
To (# of months back)	2
WSDL URL	http://208.85.175.17/sushi_01/services/
Requester ID	SSTP-38020
SUSHI Release	1.0

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### Autostat Elements – Access Provider

Autostat Table

Access Provider: SS11003

Resource Record

1-2008	Revisions: 12
Entitlement class:	
Access Provider:	SS11003
Publisher:	none

Contacts database

SS11003

- OCCLC Online Computer Library Center, Inc.
- OCCLC Online Computer Library Center, Inc.
- 4145 Frank Road
- Dublin, Ohio 43017-1100
- 414 784 6000 or 1.800.348.0079
- occlc@occlco.org
- www.occlco.org

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### Autostat elements – Customer ID

Customer ID: SS11003-wayne80CLC

**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 of ERM.**

Consortium Affiliation:

**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

**DayofMonth:** 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.

Day of Month	17
From (# of months back)	3
To (# of months back)	2

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### Harvesting a Previous Year

Access Provider	SS11003
Customer ID	SS11003-wayne80CLC
Consortium Affiliation	
Day of Month	17
From (# of months back)	12
To (# of months back)	1

**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.**

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## Troubleshooting SUSHI



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.

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## Sample SUSHI Log


```

0161 > Run task
...http://208.85.175.17/sushi_01/services/SushiServicePort?wsdl
0162 > Sep 28, 2009 10:02:54 AM com.iii.erm.ERMLogging logMessage
0163 > INFO: <AutoStat> for meta [Affil:]from 2007-12-01 to 2008-09-30
0164 > Sep 28, 2009 10:02:54 AM com.iii.erm.ERMLogging logMessage
0165 > INFO: <AutoStat> start...
0166 > log4j:WARN No appenders could be found for logger
(org.apache.axis.118n.ProjectResourceBundle).
0167 > log4j:WARN Please initialize the log4j system properly.
0168 > java.lang.Exception: Report Exception: Error Severity: Invalid Date
  
```

Problem: Harvesting over year boundary.

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## Counter XML Imports



- Usage Data can (sometimes) be imported from files of JR1 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.

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## Selected Publishers with XML Reports

- Ovid SP
- Oxford
- Palgrave
- American Chemical Society
- ProQuest
- Mary Ann Liebert

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## Converting Counter to XML

University of Nebraska – CSV to XML Conversion Tool



<http://statsconverter4erm.unl.edu/>

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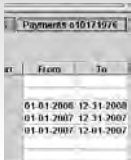
## Order Records and ERM

- 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


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## 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)**



## ERM Usage and Cost per Use Report




(excel spreadsheet report)



## 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/>



## Thanks!


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

Collection Development  
Nancy Beals



## 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

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## 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)

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## 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)

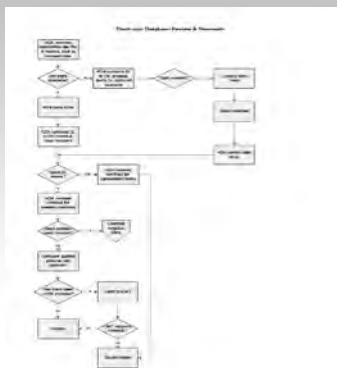
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## Where we are right now

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

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WSU Renewal Workflow



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## 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

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### Scholarly Stats Report JR1

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### ERM – Usage Statistics

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### Order Record

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### ERM CPU SUSHI Report

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### Summary Analysis Example

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### Detail Analysis by Title Report

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## Collection Development

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

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## 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”

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## 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!

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## Thank You

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