RELEASE 5
MANUAL FOR LIBRARIANS

Journals: Understanding metrics and Standard Views

Module 2: Journal Usage

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COUNTER

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INTRODUCTION

The COUNTER Code of Practice is designed so that publishers and vendors provide consistent and credible usage data. Libraries can compare data from different vendors and publishers, and use the figures as a basis for justifying the cost of past and future purchases.

You can view a friendly guide introducing the Code of Practice Release 5 for librarians at:

https://www.projectcounter.org/friendly-guides-release-5/

This manual is designed to help librarians to understand the usage statistics for journals.

DIFFERENT WAYS OF COUNTING

Release 5 of COUNTER provides new and different ways of counting usage of journals:

- There are four new metrics in reports that give you more consistent ways of comparing usage on different types of platform.
- Some old metrics have been removed.
- There is now a Title Master Report, which has different Standard Views with convenient formats. These include a view that excludes OA_Gold usage, so that you can calculate cost of usage per journal without needing a second report. (OA_Gold content is permanently free to use, as the result of an open license.)

In this guide, we shall introduce the new metrics and the Standard Views so that you know what to expect.

We shall also look at how you can monitor trends consistently between Release 4 and Release 5 reports. And we shall look at using Microsoft Excel to calculate totals.

THE PLATFORM EFFECT

Release 4 provided separate metrics for HTML and PDF downloads. However, different platforms work in different ways – which makes it difficult to compare the counts.

Consider a journal with links to various articles:

- On Platform A, if you click on a link, you are shown a short abstract description of the article, along with further links that enable you to view (download) the full article as either HTML or PDF.

  Our user clicks on the link to the article, reads the abstract, and then clicks to download the PDF. Release 4 doesn't count the first click, because the content of the article is not downloaded. But it does count the second click, which downloads the PDF.

- On Platform B, if you click on a link, you are shown a short abstract description of the article, along with the full HTML text of the article. There is usually also a link that enables you to view (download) the full article as a PDF.

Our user clicks on the link to the article, reads the abstract, and then clicks to download the PDF. Here, Release 4 counts both clicks, because both of them download full content of the article – the first as HTML and the second as PDF.

See what happened there? The usage is the same – the user checks the article and then downloads the PDF – but the count is twice as much.

Imagine this happening, for example, 50 times a month for three months. A Release 4 report for the period then shows a Reporting Period Total of 150 for the journal on Platform A. But the same report for a journal with equal usage on Platform B shows 300.

GOODBYE OLD METRICS

To address this, Release 5 no longer counts the metrics **Reporting Period HTML** and **Reporting Period PDF** and **Reporting Period Total**.

Note that **Reporting Period Total** was a total of the other two metrics, plus any other download formats that were not counted separately, such as ePub.

HELLO NEW METRICS

The new metrics in Release 5 get rid of the Platform Effect we discussed above. There is no more distinction between PDF and HTML downloads, and four new metrics provide different ways of counting.

First, there are two **Investigations** metrics.

- **Total_Item_Investigations**. This counts every click that displays *information* about an article, and every click that *downloads* its content:

  Information can be an abstract, for example, or information about the author.
  Download clicks are those that download the full text of the article. Most of these downloads are in either HTML or PDF format, but downloads of the full text in any format are counted.

  Note that Release 4 only counted clicks to download, so the new metrics give you extra information about the activity on an article.

- **Unique_Item_Investigations**. This also counts the information and download clicks for each article. However, repeated clicks on the same article during a session are not added to the count. What this means is that if a user clicks to view the abstract, the HTML, or the PDF of a single article, this click is counted once and only once. Any other clicks to download or display information on the same article during the session are not added to this metric.

Two further metrics – **Requests** metrics – only count downloads. These are the clicks that download the full text of an article. Clicks on abstracts and other information about the article are not counted.

- **Total_Item_Requests**. This counts the number of times a user clicks to download an article (item) either as a PDF, HTML or other formats. *If a user clicks to view the HTML of an article and then clicks to download the PDF, the count is two.*

- **Unique_Item_Requests**. This counts the download clicks for an article, but it does not include repeated clicks on the same article during a session. The first click to view the article as HTML or PDF is counted. However, no further clicks to view that article in the session are counted. *If a user clicks to view the HTML of an article and then clicks to download the PDF, the count is one.*

Total_Item_Requests effectively reproduces the **Reporting Period Total** in Release 4, so you can use it to make direct comparisons over time between Release 4 reports and Release 5 reports.

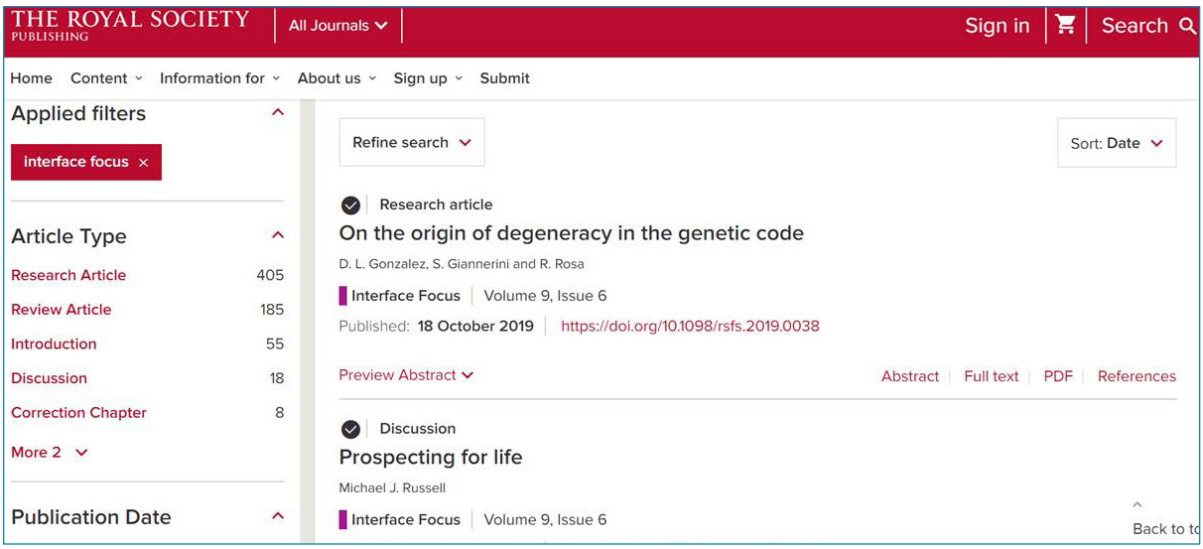
Most libraries will use **Unique_Item_Requests** to calculate cost per use. That is because this metric more accurately reflects usage per item (article) across different types of platform.

Finally, the key difference between **Investigations** metrics and **Requests** metrics is that **Investigations** count all clicks for information about an article (such as abstracts) – not just downloads. **Requests** only count clicks for the downloads of the full text.

A PRACTICAL EXAMPLE

Now let us look at an example and see how the metrics work in practice.

A reader is looking at the Royal Society journals. On this platform, there are abstract descriptions of articles. Any clicks on an abstract will be counted by the **Investigations** metrics, but not by the **Requests** metrics.



Our user is interested in the article *On the origin of degeneracy in the genetic code*.

1. First, she clicks on the **Abstract** link. This displays further information about the article.
2. The second click is on the link for **Full Text.** This opens the content of the chapter in HTML form.
3. The third click is on the link to the PDF for the same article. This downloads and opens the content of the article in PDF form.

The table below shows how this activity is counted by each Release 5 metric.

Metric	Click 1	Click 2	Click 3	Total
Total_Item_Investigations	✓	✓	✓	3
Unique_Item_Investigations	✓	—	—	1
Total_Item_Requests	—	✓	✓	2
Unique_Item_Requests	—	✓	—	1

- **Total_Item_Investigations** has counted all three clicks, including the click on the abstract.
- **Unique_Item_Investigations** has counted the first click only. The other clicks are investigations of the same item (article).
- **Total_Item_Requests** does not count the click on the abstract, but counts both the HTML and the PDF clicks.
- **Unique_Item_Requests** does not count the click on the abstract. It counts the HTML click, but not the PDF click, which downloads the same article.

Now let us consider the download clicks on two specific journals over a three-month period. We can compare how they are counted in Release 4 and Release 5.

The two journals are on different platforms; we shall comment on this later.

	Release 4			Release 5	
	Reporting Period Total	Reporting Period HTML	Reporting Period PDF	Total_Item_ Requests	Unique_Item_ Requests
Journal A	704	430	274	704	452
Journal B	256	100	156	256	215

For Journal A, there is a total of 704 downloads for the whole period. The Release 4 metrics show that 430 of these are HTML downloads and 274 are PDF downloads.

For Journal B, there is a total of 256 downloads for the whole period. The Release 4 metrics show that 100 of these are HTML downloads and 156 are PDF downloads.

Now look at the Release 5 metrics.

The total downloads for each journal are counted in the **Total_Item_Requests** metric: 704 for Journal A and 256 for Journal B. It is exactly the same count as the **Reporting Period Total** in Release 4 reports. So you can use compare these two figures directly when you want to monitor trends between Release 4 and Release 5 reports.

The second Release 5 metric, **Unique_Item_Requests**, enables us to see something different.

- For Journal A, only 452 of the 704 downloads were unique; so 252 of these were by users downloading the same article more than once during a session.
- In the same way, 215 of the 256 downloads in Journal B were unique; so 41 downloads were by users clicking more than once on the same article during a session.

By removing the repeated downloads of an article in a session, the counts for **Unique_Item_Requests** gives you a more useful figure for comparing usage between journals and for calculating cost per usage.

One last thing is worth noting. In Journal A, approximately 64% of the downloads are unique (452/704). In Journal B, approximately 84% (215/256) are unique. This makes it likely that Journal A is on a platform that downloads the full HTML along with each abstract, and that many users then click on the PDF to read the article. Journal B is probably on a platform that does not display the full HTML with the abstract, which accounts for the higher percentage of unique downloads.

SESSIONS

The **Unique** metrics do not count repeated clicks within a session, so the way sessions are handled on a platform has an impact on these metrics. A session usually starts when a user first accesses a platform or logs in, and the session ends when the user logs out or the session is timed out.

Some platforms do not use sessions. In this case, for the COUNTER reports, the day is divided into 24 one-hour slices. All usage from the same IP address with the same user agent within the same one-hour slice is regarded as one session.

Automatic time-outs

Here is an example of how automatic time-outs affect the counts:

1. A user downloads an article from a journal and spends more than 40 minutes reading it and taking notes.
2. Meanwhile the platform session times out after 30 minutes of inactivity.
3. The user logs back in again and starts a new session; the user clicks to view the same article again.

Let's look at the two **Requests** metrics for this scenario.

- The **Total_Item_Requests** count will be 2 – one for downloading the article in the first session, and one for downloading it in the second session.
- The **Unique_Item_Requests** count will also be 2. Even though it is the same article that was downloaded, the second download occurred during a separate session – so it is counted again. If this all took place in a single session, the **Unique_Item_Requests** would only be 1.

THE TITLE MASTER REPORT AND ITS STANDARD VIEWS

The Title Master Report contains all the available metrics for books and journals. As for all COUNTER reports, it can be filtered so that you see only what you need and exactly what you need. For monitoring journal usage, there are four convenient Standard Views:

- **TR_J1** shows unique and total requests (excluding OA_Gold content).
- **TR_J2** shows where users were denied access to journals because their institution had no license for the content, or because simultaneous use (concurrency) licenses were exceeded.
- **TR_J3** shows investigations and downloads of **Controlled** (licensed) content and **OA_Gold** (content that is permanently free to use, as the result of an open license).
- **TR_J4** shows access broken down by publication year of downloaded articles. It does not include activity on OA_Gold content.

These views are provided as Microsoft Excel files or as TSV files.

TR_J1 – JOURNAL REQUESTS (EXCLUDING OA_GOLD)

In practical terms, this Standard View shows you two things for each journal listed:

- the number of downloads (clicks on HTML, PDF and other formats of articles)
- the number of unique downloads of articles (which excludes repeated downloads of the same article in a session)

Because this Standard View does not include OA_Gold usage, you can directly calculate the cost of usage for each journal you subscribe to, without needing a second report. (OA_Gold content is permanently free to use, as the result of an open license.)

Librarians using Release 4 will be aware that you need two reports to achieve this: the first (JR1) to show all usage, and the second (JR1GOA) to identify the OA_Gold usage that needs to be deducted before calculating the cost.

Here is an example of the Release 5 Standard View TR_J1. For convenience, we have hidden some of the columns from view.

Title	Publisher	Metric_Type	Reporting_ Period_Total	Aug-2018	Sep-2018	Oct -2018
Academic Perspectives	Ind Rev	Total_Item_Requests	983	257	209	517
Academic Perspectives	Ind Rev	Unique_Item_Requests	645	153	136	356
Archeology Today	Ind Rev	Total_Item_Requests	533	210	164	159
Archeology Today	Ind Rev	Unique_Item_Requests	345	129	110	106
Avian Bioengineering M	Ind Rev	Total_Item_Requests	3	1	2	0
Avian Bioengineering M	Ind Rev	Unique_Item_Requests	3	1	2	0

This Standard View shows two metrics for each journal over the selected period:

- **Total_Item_Requests**. This counts the number of times a user clicks to download an article (item) either as a PDF, HTML or other formats. *If a user clicks to view the HTML of an article and then clicks to download the PDF, the count is two.*
- **Unique_Item_Requests**. This counts the download clicks for an article, but it does not include repeated clicks on the same article during a session. The first click to view the article as HTML or PDF is counted. However, no further clicks to view that article in the session are counted. *If a user clicks to view the HTML of an article and then clicks to download the PDF, the count is one.*

There are separate columns showing the counts for each month of the reporting period, preceded by a column showing the totals for the whole period.

- The report only shows journals where there has been activity. Journals with no downloads do not appear on the report.
- You can use the **Total_Item_Requests** count to make a direct comparison to Release 4 reports and view trends over time (but note that this report excludes OA_Gold usage).
- There are no separate metrics for PDF and HTML downloads.
- There is no **Total for all Journals** in the report. We shall look at this later in the guide.

Cost-per-usage

The **Unique_Item_Requests** count gives you a figure you can use directly to calculate cost-per-usage for each journal. So if your quarterly subscription to Archaeology Today is $50, then cost-per-usage for the quarter is about 11 cents.

In the example below, we have simply added the subscription cost and the calculated cost per usage as separate columns in Microsoft Excel.

Title	Publisher	Metric_Type	Reporting_ Period_Total	Aug-2018	Sep-2018	Oct -2018	Subscript	Cost/Usage
Academic Perspective:	Ind Rev	Total_Item_Requests	983	257	209	517		
Academic Perspective:	Ind Rev	Unique_Item_Requests	645	153	136	356	$75.00	$0.09
Archeology Today	Ind Rev	Total_Item_Requests	533	210	164	159		
Archeology Today	Ind Rev	Unique_Item_Requests	345	129	110	106	$50.00	$0.11
Avian Bioengineering	Ind Rev	Total_Item_Requests	3	1	2	0		
Avian Bioengineering	Ind Rev	Unique_Item_Requests	3	1	2	0	$12.00	$4.00

TR_J2 – JOURNAL ACCESS DENIED

This Standard View shows instances where users have been unable to gain access to content in journals. This enables you to see demand for journals to which you might want to subscribe in the future.

Here is an example, where we have included the header information. For convenience, we have hidden some of the columns from view.

	A	B	D	J	K	L	M	N
1	Report_Name	Journal Access Denied						
2	Report_ID	TR_J2						
3	Release	5						
4	Institution_Name	Client Demo Site						
5	Institution_ID	ISNI:000000012150090X						
6	Metric_Types	Limit_Exceeded; No_License						
7	Report_Filters	Access_Method=Regular; Data_Type=Journal						
8	Report_Attributes							
9	Exceptions							
10	Reporting_Period	Begin_Date=2018-01-01; End_Date=2018-03-31						
11	Created	2019-04-25T11:42:03Z						
12	Created_By	European Journal Association						
13								
14	**Title**	**Publisher**	**Platform**	**Metric_Type**	**Reporting_Period _Total**	**Jan-2018**	**Feb-2018**	**Mar-2018**
15	Architectural Journal of Amer	Ind Rev	Platform 1	No_License	8	0	1	7
16	Biology Monthly Review	Gander	Platform 1	No_License	1	0	0	1
17	Clinical Quarterly	Xerxes	Platform 1	No_License	2	0	0	2
18	Doctor's Digest	Hopper	Platform 1	No_License	1	0	0	1
19	Analytical Philosophy Review	Happel	Platform 1	Limit_Exceeded	1	0	0	1

Columns L, M and N show the counts per month and column K shows the total for all three months. Two types of access refusal are logged:

- **No_License**. This indicates where a user has attempted to view an article, but your institution has no license to view that content.
  In this example, users have been denied access to content on four different journals for this reason. The spike in activity in March for the Architectural Journal suggests that there might be serious demand for this title.
- **Limit_Exceeded**. Some licenses only allow a maximum number of simultaneous accesses to a title or a platform. This metric indicates where that limit has been exceeded.
  In our example, there is only one instance of this – the Analytical Philosophy Review.

TR_J3 – JOURNAL USAGE BY ACCESS TYPE

This Standard View shows all four new Release 5 metrics for each journal over a selected period.

Counts for Controlled access (**Access_Type = Controlled**) are listed separately from counts for content that is permanently free to use, as the result of an open license (**Access_Type=OA_Gold**).

Controlled content means, in most cases, that a license is needed in order to view the content; the license is normally authorized either by a user login or by a registered IP address. Users who are not authorized in this way are not able to download the full content as HTML, PDF, etc.

However, you should also know that, in some cases, Controlled content can be made freely available by the publishers. For example:

- Some publishers will make the Controlled content freely available at some point after the publication date, such as five years.
- Publishers can make a Controlled item freely available in special circumstances, such as in order to share information on fighting a new disease.

This content, despite being freely available, remains Controlled (and the publisher has the option to end free availability). It will be included in COUNTER reports as **Access_Type=Controlled**.

OA_Gold (**Access_Type=OA_Gold**) only covers content that is permanently freely available under an open license.

Also note that some journals offer both Controlled and OA_Gold content. For these journals, the two types of content are listed separately. So they will have eight lines of metrics — four for OA_Gold content and another four for Controlled content.

Here is an example. For convenience, we have hidden some of the columns from view.

Title	Publisher	Platform	Access_Type	Metric_Type	Reporting_Period_Total	Jan-2018	Feb-2018	Mar-2018
Biomechanical Ethics	Hopper	Platform 1	OA_Gold	Total_Item_Investigations	16	8	6	2
Biomechanical Ethics	Hopper	Platform 1	OA_Gold	Total_Item_Requests	9	3	4	2
Biomechanical Ethics	Hopper	Platform 1	OA_Gold	Unique_Item_Investigations	9	5	2	2
Biomechanical Ethics	Hopper	Platform 1	OA_Gold	Unique_Item_Requests	6	2	2	2
Dendrochronology No	Gander	Platform 1	Controlled	Total_Item_Investigations	260	59	86	115
Dendrochronology No	Gander	Platform 1	Controlled	Total_Item_Requests	260	59	86	115
Dendrochronology No	Gander	Platform 1	Controlled	Unique_Item_Investigations	189	40	63	86
Dendrochronology No	Gander	Platform 1	Controlled	Unique_Item_Requests	189	40	63	86
Elements of semiotics	Blanco	Platform 1	OA_Gold	Total_Item_Investigations	63	25	27	11
Elements of semiotics	Blanco	Platform 1	OA_Gold	Total_Item_Requests	24	8	11	5
Elements of semiotics	Blanco	Platform 1	OA_Gold	Unique_Item_Investigations	52	20	24	8
Elements of semiotics	Blanco	Platform 1	OA_Gold	Unique_Item_Requests	23	7	11	5
Elements of semiotics	Blanco	Platform 1	Controlled	Total_Item_Investigations	7	2	4	1
Elements of semiotics	Blanco	Platform 1	Controlled	Total_Item_Requests	4	2	2	0
Elements of semiotics	Blanco	Platform 1	Controlled	Unique_Item_Investigations	6	2	3	1
Elements of semiotics	Blanco	Platform 1	Controlled	Unique_Item_Requests	3	1	2	0

The **Access_Type** column indicates whether the content is Controlled or permanently freely available through an open license.

In this example, all the articles in the first journal, Biomechanical Ethics, are permanently freely available through an open license.

In January, there were 8 investigations, but only three downloads. Only two downloads were unique, so it seems that someone downloaded the same article twice in the same session. The third download could be for a separate article, or it could have been one of the same articles in a different session.

The second journal, Dendrochronology Now, only has Controlled content. It is clearly very popular.

The third journal, Elements of semiotics, has both Controlled and OA_Gold content. The first four lines show that the OA_Gold articles have been downloaded 24 times over the three months, with 23 of these being unique. Access to the Controlled articles (the second set of four lines for the journal) has been much lower – only 4 downloads over the period – so this might be worth investigating.

TR_J4 – JOURNAL REQUESTS BY YOP (EXCLUDING OA_GOLD)

This Standard View shows the same metrics as the TR_J1, but usage is broken down by year of publication. So you can use it for two types of cost-per-usage analysis:

- cost-per-usage of current journal content
- cost-per-usage of archive content

For example, if your library had a separate license for journal archive content published from 1951 to 2003, you could filter the report in two ways.

- Filter to show only usage for journals published between 1951 and 2003 to calculate cost-per-usage of archive content.
- Filter to show only usage for journals published after 2003 to calculate cost-per-usage of current journal content.

The report only shows Controlled usage — where access to the journal is Controlled by license. OA_Gold access (content that is permanently free to use, as the result of an open license) — is not included.

Here is an example. For convenience, some of the columns have been hidden.

Title	Publisher	Platform	YOP	Metric_Type	Reporting_Period_Total	Jan-2018	Feb-2018	Mar-2018
Arthropods Review	Hopper	Platform 1	1998	Total_Item_Requests	1	0	0	1
Arthropods Review	Hopper	Platform 1	1998	Unique_Item_Requests	1	0	0	1
Arthropods Review	Hopper	Platform 1	1999	Total_Item_Requests	3	0	0	3
Arthropods Review	Hopper	Platform 1	1999	Unique_Item_Requests	2	0	0	2
Aquatic Ecology	Xerxes	Platform 1	2002	Total_Item_Requests	37	14	15	8
Aquatic Ecology	Xerxes	Platform 1	2002	Unique_Item_Requests	22	8	9	5
Aquatic Ecology	Xerxes	Platform 1	2018	Total_Item_Requests	4	3	0	1
Aquatic Ecology	Xerxes	Platform 1	2018	Unique_Item_Requests	3	2	0	1

In this example, we have not filtered by Year of Publication (YOP). The report shows us activity for Arthropods Review in two separate archived years: 1998 and 1999. These are the top four lines that you see.

For each Year of Publication (YOP), there are two lines:

- the first shows **Total_Item_Requests**
- the second shows **Unique_Item_Requests**

The counts are displayed in separate columns for each month covered by the report and as a total for the whole period (**Reporting_Period_Total**). We can see that Arthropods Review was only used in March 2018.

Now look at the bottom four lines, which report on Aquatic Ecology. In this case, the report covers usage for one archive year: 2002. It also covers usage for the current issue of the journal: 2018.

So you can see that there was much more interest in the 2002 archive for Aquatic Ecology than there was for the current journal content (2018).

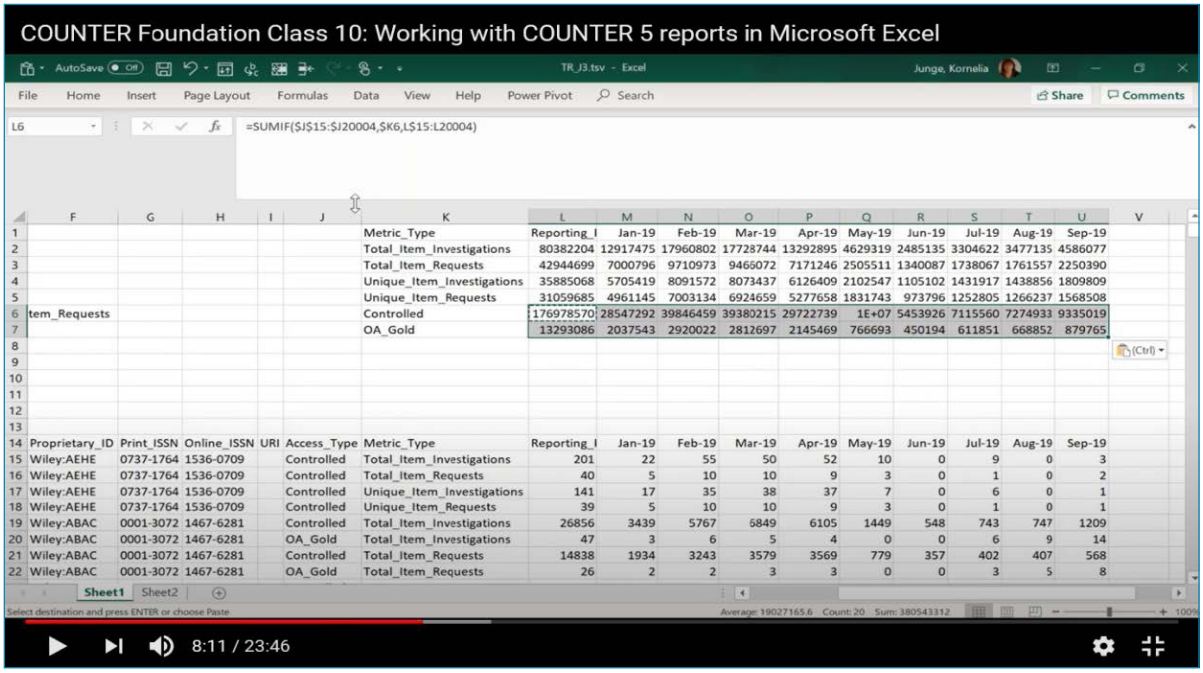
This Standard View replaces the Release 4 report JR5, but note that there is no **Total for all Journals**.

CALCULATING TOTALS

Release 4 reports provided a line that gave counts for **Total for all Journals**. There are technical reasons why this not possible in Release 5 reports and their Standard Views.

It is, however, not difficult to add this in Excel once you have opened the report.

This and more are covered in a very useful online tutorial at:
https://www.youtube.com/watch?v=AU_DBLi4hSo&feature=youtu.be



The tutorial is about 20 minutes long, and covers other useful features, such as filters. The details of how to create totals begin after about four and a half minutes.

TRENDS

If you want to track a trend starting from before the implementation of Release 5, you need to use Release 4 reports to view the earlier figures. Note that publishers did not all adopt Release 5 at the same time.

There is a simple way of monitoring trends across releases. Compare the Release 5 metric **Total_Item_Requests** for a journal in the Release 5 report TR_J3 with the **Reporting Period Total** for the same journal in the Release 4 report JR1. Note that the OA_Gold and Controlled content for a journal that has both types of content are listed separately in TR_J3.

OA, OA, OA

Before we go further, we need to point out that the Release 5 Access_Type OA_Gold is the same as Gold OA in Release 4. It makes life more interesting, doesn't it?

Using TR_J1

You can also use the new Release 5 Standard View TR_J1 for trends, but this does not include OA_Gold usage, whereas the Release 4 report JR1 does include Gold OA (which, as we said, is the same thing).

So, you also need the Release 4 report JR1GOA to enable you to subtract that usage from the JR1 report.

For example, we would like to compare usage between the first three months of 2018 and the same quarter in 2019.

Here is our Release 4 report JR1 for the first quarter of 2018:

Journal	Publisher	Platform	Online IS	Reporting Period Total	Reporting Period HTML	Reporting Period PDF	Jan-18	Feb-18	Mar-18
Total for all journals		**Platform Z**		**4449**	**1566**	**2733**	**2223**	**1285**	**941**
Aquatic Ecology	Xerxes	Platform Z	3225-3123	1363	601	732	432	376	555
Biomechanical Ethic	Hopper	Platform Z	2312-8751	1312	548	651	625	687	0
Cartography Today	Gander	Platform Z	0154-1521	1717	403	1310	1109	222	386
Dendrochronolgy No	Ind Rev	Platform Z	0165-5542	57	14	40	57	0	0

And here is the Release 4 report JR1GOA, showing Gold OA usage.

Journal	Publisher	Platform	Online IS	Reporting Period Total	Reporting Period HTML	Reporting Period PDF	Jan-18	Feb-18	Mar-18
Total for all journals		**Platform Z**		**426**	**189**	**237**	**210**	**125**	**91**
Aquatic Ecology	Xerxes	Platform Z	3225-3123	123	56	67	32	36	55
Biomechanical Ethic	Hopper	Platform Z	2312-8751	129	58	71	62	67	0
Cartography Today	Gander	Platform Z	0154-1521	167	71	96	109	22	36
Dendrochronolgy No	Ind Rev	Platform Z	0165-5542	7	4	3	7	0	0

The count we need for our comparison is the **Reporting Period Total** without Gold OA usage. From these reports, we can see that articles from Dendrochronology Now were downloaded 57 times during the reporting period (see the last line of the top report), but 7 of these were Gold OA usage (see the last line of the lower report). So, the figure we need to compare with the following year is 50.

Here is the **Release 5 Standard View TR_J1** for comparison. We have hidden some of the columns for convenience.

Title	Publisher	Platform	Online_ISSN	Metric_Type	Reporting_Period_Total	Jan-2019	Feb-2019	Mar-2018
Aquatic Ecology	Xerxes	Platform Z	3225-3123	Total_Item_Requests	1062	222	340	500
Aquatic Ecology	Xerxes	Platform Z	3225-3123	Unique_Item_Requests	563	118	180	265
Biomechanical Ethi	Hopper	Platform Z	2312-8751	Total_Item_Requests	1183	563	620	0
Biomechanical Ethi	Hopper	Platform Z	2312-8751	Unique_Item_Requests	627	298	329	0
Cartography Today	Gander	Platform Z	0154-1521	Total_Item_Requests	1550	1000	200	350
Cartography Today	Gander	Platform Z	0154-1521	Unique_Item_Requests	822	530	106	186
Dendrochronolgy No	Ind Rev	Platform Z	0165-5542	Total_Item_Requests	50	50	0	0
Dendrochronolgy No	Ind Rev	Platform Z	0165-5542	Unique_Item_Requests	27	27	0	0

Remember, we need to compare the figure of 50 for Dendrochronology Now in 2018 with the **Total_Item_Requests** for 2019, which is also 50.

SUMMARY

We have gone into detail about metrics, sessions and reports in this manual, and we appreciate that this can be confusing.

But we can summarise the main information you need as follows:

- There are four key metrics for journals:
  Total_Item_Investigations
  Unique_Item_Investigations
  Total_Item_Requests
  Unique_Item_Requests

  If you want to see all these metrics for a journal, use the Standard View TR_J3.

- **Investigations** metrics count two types of click: Information clicks (such as abstracts) and Download clicks (full content of an article, such as HTML).

- **Requests** metrics only measure the Download clicks.

- **Total** metrics count every click. **Unique** metrics do not count repeated clicks on the same article in the same session. So if you download the content of an article in HTML and then in PDF in the same session, the count will only be 1.

- Sessions are based either on log-in/log-out time, or they are based on 24 one-hour sessions throughout the day, with each session beginning automatically on the hour. This depends on the platform on which the content is published.

- If you want to work out cost-per-usage for a journal, use Standard View TR_J1 and look at the **Unique_Item_Requests**. This gives you a more consistent way of counting usage across the vast majority of platforms.

- If you want to track trends back across Release 4 reports and Release 5 reports, compare the **Total_Item_Requests** in Release 5 Standard View TR_J3 to the **Reporting Period Total** for same journal in the Release 4 report JR1.

- If you want to separate activity on Controlled content (access only to authorized users) from OA_Gold content (which is available freely and permanently on an open license), use the standard view TR_J3. But remember that it is also possible that some Controlled content can be made freely available to unauthorized users, at the discretion of the publisher.

- The Release 5 Standard Views do not provide **Total for all Journals**. You can find out how to add your own totals to the report in Excel in this very useful tutorial: https://www.youtube.com/watch?v=AU_DBLi4hSo&feature=youtu.be

We hope you have found this helpful.

About the author

Over a long career, John Hendry has written about everything from Art and Austrian wine through to Z codes for financial markets.

He has made a speciality of presenting complex matter, including PhD theses, in clear and simple terms that make them accessible to a broader audience. Many of his technical manuals have received awards from user groups and independent surveys.

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