



COUNTER

Release 5.1

The Friendly Guide

Introducing COUNTER Reports

This is part of a suite of Friendly Guides demystifying Release 5.1 of the COUNTER Code of Practice

The complete series is:

- Introducing COUNTER Reports
- Introducing COUNTER Metrics
- COUNTER Attributes, Elements, and Other (Slightly) Techy Things
- COUNTER and Open Access
- Becoming COUNTER Compliant
- COUNTER for Consortia
- Changes in Release 5.1

Note: for ease of reading we have used plain English in all the Guides. For technical reasons, the Code of Practice itself uses underscores to link words – thus Data Type is actually Data_Type, and Total Item Investigations is Total_Item_Investigations.

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What are the COUNTER Reports?

There are four COUNTER Reports, each of which has some Standard Views associated with it. The COUNTER Reports are designed to be comprehensive and offer maximum flexibility in working with metrics. By contrast the Standard Views of COUNTER Reports are pre-set summaries of particular types of activity. They don't include every metric and often are focused on only one or two Data Types.

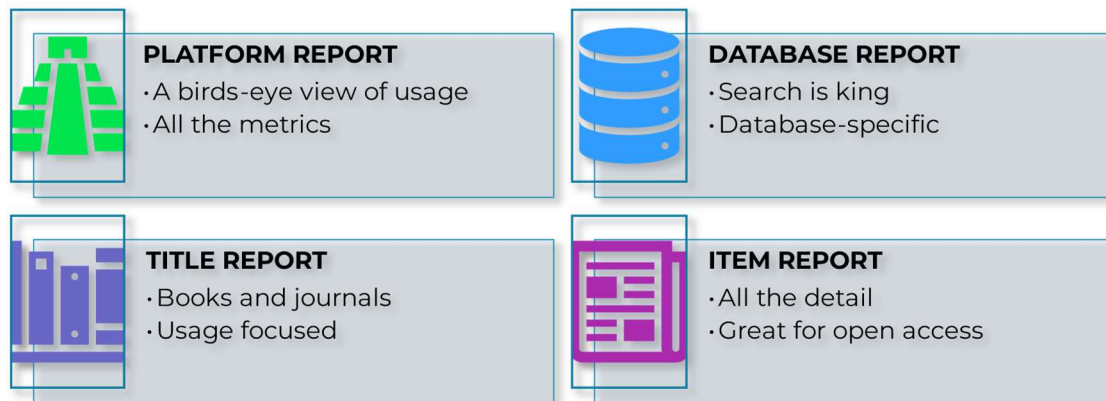


Figure 1. The four COUNTER Reports

You can view full samples of all the COUNTER Reports in the Code of Practice (<https://cop5.projectcounter.org/en/5.1>). The images provided below are deliberately short to make them easier to read.

Platform Reports

The Platform Report, or PR, is a high-level view of all activity on a platform (that's the term we use for publisher websites). It includes every COUNTER metric, broken down by Data Type as standard and by Access Method on request.

Let's take an example where a platform includes books, journals, and multimedia. This particular platform doesn't have any open access content, but it does make some things free to read. It does not offer text and data mining, so the Access Method for usage is always Regular.

The PR for this platform would split out usage to show the Data Types Book, Journal and Multimedia separately, but would not be more granular than that – so this isn't the report to use if you want to know usage of a particular title.

Within each Data Type the PR would then be broken down into separate rows for Access Types Controlled and Free To Read.

Platform	Data Type	Metric Type	Reporting Period Total	Month by month
Website A	Book	Unique Item Requests	16	...
Website A	Journal	Unique Item Requests	59	...
Website A	Multimedia	Unique Item Requests	12	...
...

Figure 2. What to expect of a Platform Report – remember, a full sample is available in the Code of Practice!

Finally, the PR would break things down further by Metric Types.

Standard Views of Platform Reports

There's only one Standard View of the Platform Report, called **Platform Usage** or PR_P1. It filters the PR to show only three metrics: Total Item Requests, Unique Item Requests, and Searches Platform.

Database Reports

The Database Report, or DR, shows activity for specific databases on a platform and it includes every COUNTER metric, with key information about the database itself. broken down by Data Type as standard and by Access Method on request.

In this scenario our publisher platform includes an abstracts database, which is available only to subscribers and which can be data mined.

Database	Other info about the database	Data Type	Metric Type	Reporting Period Total	Month by month
Database B	...	Database Full	Searches Regular	352	...
Database B	...	Database Full Item	Total Item Investigations	113	...
Database B	...	Database Full Item	Unique Item Investigations	98	...
Database B	...	Database Full Item	Total Item Requests	83	...
Database B	...	Database Full Item	Unique Item Requests	81	...
Database B	...	Database Full Item	No License	2	...
...

Figure 3. What to expect of a Database Report (full sample available in the Code of Practice)

The DR for this platform would show the abstracts database with Data Type Database AI, and Access Type Controlled. Since the database can be used for text and data mining, the DR would break down usage to show Access Methods Regular and TDM, and of course it would then refine things further by Metric Types.

Standard Views of Database Reports

There are two Standard Views of the Database Report:

- **Database Search and Item Usage** (DR_D1) filters the DR to show only Total Item Requests, Unique Item Requests, and Searches.
- **Database Access Denied** (DR_D2) filters the DR to show denials, also known as turnaways.

Title Reports

Titles is a term we use frequently within COUNTER. It includes books and journals, but also conference proceedings, reports, theses, and other such materials. You can find out more about titles in the Data Type section of the *Friendly Guide to COUNTER Attributes, Elements, and Other (Slightly) Techy Things*.

The Title Report (TR) shows activity for specific titles on a platform and it includes every COUNTER metric as well as key information about the title (e.g. ISBN or ISSN). It is broken down by Data Type as standard, but also by Access Type, Access Method, and year of publication (YOP) on request.

Title	Other info about the title	Data Type	YOP	Access Type	Metric Type	Reporting Period Total	Month by month
Title C	...	Book	2022	Controlled	Unique Item Requests	15	...
Title C	...	Book	2022	Controlled	Unique Item Requests	48	...
Title D	...	Journal	2022	Controlled	Unique Item Requests	319	...
Title D	...	Journal	2022	Open	Unique Item Requests	547	...
...

Figure 4. What to expect of a Title Report. This is a lengthy report, so the full sample available in the Code of Practice will be valuable in understanding it.

In this scenario, our publisher platform includes whole books, as well as serialised journals and conference proceedings, with a mixture of open access, free, and subscriber-only content. The platform can be data mined.

The TR for this platform would show each book title separately with Data Type Book, each journal title with Data Type Journal, and each conference proceeding title with Data Type Conference. Since the journals and conferences are serials, they would be refined by YOP, while each book would have only a single YOP. With text and data mining allowed the TR would break down usage to show Access Methods Regular and TDM, and of course it would then refine things further by Metric Types.

Standard Views of Title Reports

There are three Standard Views of the Title Report for books and reference works, or sections within books and reference works:

- **Book Requests (Controlled)** (TR_B1) filters the TR to show Total Item Requests and Unique Item Requests for Controlled (i.e. subscriber-only) books and reference works or sections within them.
- **Book Access Denied** (TR_B2) filters the TR to show access denials to books and reference works or sections within them.
- **Book Usage by Access Type** (TR_B3) filters the TR to show all relevant metrics for books, broken down by Access Type so that Controlled, Open, and Free To Read books and reference works or sections within them can be clearly distinguished.

There are also four Standard Views of the Title Report for journals:

- **Journal Requests (Controlled)** (TR_J1) filters the TR to show Total Item Requests and Unique Item Requests for Controlled articles within journals.
- **Journal Access Denied** (TR_J2) filters the TR to show access denials to articles within journals.
- **Journal Usage by Access Type** (TR_J3) filters the TR to show all relevant metrics for articles within journals, broken down by Access Type so that Controlled, Open, and Free To Read usage can be clearly distinguished.
- **Journal Requests by YOP (Controlled)** (TR_J4) is a more granular view of TR_J1 that includes a breakdown by year of publication.

Item Reports

Item is another common term within COUNTER. It includes things like articles, videos, book sections, database records and so on. You can find out more about items in the Data Type section of the *Friendly Guide to COUNTER Attributes, Elements, and Other (Slightly) Techy Things*.

The Item Report, or IR, is very granular, showing every applicable COUNTER metric for every single item on a platform, with a lot of information about the item itself (e.g. identifier, parent title if any). It is broken down by Data Type as standard, but also by Access Type, Access Method, and year of publication (YOP) on request.

In this scenario, our publisher platform includes lots of multimedia items, some of which are open access. The platform cannot be data mined.

The IR for this platform would show each multimedia item with its relevant Data Type and Access Type (Controlled for the subscriber content, Open for the open access materials). Since the database cannot be data mined the Access Method would always be Regular. Each item's record would then be refined to show activity for each Metric Type.

Item	Other info about the item	Parent Title	Other info about the parent title	Data Type	Access Type	Metric Type	Reporting Period Total	Month by month
Item E	...	Title C	...	Book Segment	Controlled	Unique Item Requests	9	...
Item F	...	Title D	...	Article	Open	Unique Item Requests	121	...
...

Figure 5. What to expect of an Item Report. IR is our most comprehensive report, so again the full sample available in the Code of Practice will be valuable in understanding it.

Standard Views of Item Reports

There are two Standard Views of the Item Report:

- **Journal Article Requests** (IR_A1) filters the IR to show only items with Data Type Article.
- **Multimedia Item Requests** (IR_M1) filters the IR to show only items with Data Type Multimedia.

Which report should I use?

We always recommend using one of the four COUNTER Reports – Platform, Database, Title, or Item – as these give you lots of options for working with the data. Typically the Database and Title Reports offer the best balance of granularity with a usable amount of information. By contrast the Platform Report is best suited for a birds-eye view of usage, while the Item Report is excellent for extremely granular data analysis.

All COUNTER Reports can be filtered easily, and we have produced the *Friendly Guide to Working With COUNTER Reports* to highlight how that works.

If you do want to use the Standard Views, make sure you choose one that is appropriate for your needs. If you want to know about usage of open access articles, for example, using the TR_J1 wouldn't be helpful.

What about open access usage?

We recommend using the Global Item Report for checking on OA usage. That's covered in a lot more detail in the *Friendly Guide to COUNTER and Open Access*. While not mandatory, we do recommend that every platform offer the Global Item Report.

Who needs to supply the various COUNTER Reports?

R5.1, like earlier versions of the Code of Practice, includes information about which reports different types of platform should provide. This is done using the Host Type. The COUNTER Registry includes information about platforms' Host Types, so if you want to know what reports to expect from a specific platform check out <https://registry.projectcounter.org>.

Check out the *Friendly Guide to COUNTER Attributes, Elements, and Other (Slightly) Techy Things* if you want to know more about Host Types, but here's a quick reference for which COUNTER Reports you should expect.

COUNTER Report	Standard Views	Host Types
Platform Report	PR_P1	All Host Types
Database Report	DR_D1 and DR_D2	A&I Database Aggregated Full Content Discovery Service eBook Collection Full Content Database Multimedia Collection
Title Report	All	Aggregated Full Content
	TR_B1, TR_B2 and TR_B3	eBook eBook Collection
	TR_J1, TR_J2, TR_J3 and TR_J4	eJournal
Item Report	None	Data Repository
	IR_A1	Repository Scholarly Communication Network Aggregated Full Content* eBook* eJournal*
	IR_M1	Multimedia

Find out more

There is a lot more information in the full Code of Practice (<https://cop5.projectcounter.org/en/5.1>) and of course in the COUNTER Media Library (medialibrary.projectcounter.org).

If you have questions that haven't been answered elsewhere, please don't hesitate to email our Project Director:
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