This guide is a non-intimidating manual for publishers and vendors implementing COUNTER-compliant usage statistics for the first time, or for more experienced hands, implementing new reports or preparing for COUNTER audit.

Author: Tasha Mellins-Cohen
What is COUNTER?
COUNTER stands for Counting Online Usage of Networked Electronic Resources. Our website is at http://www.projectcounter.org/

COUNTER was one of the first, if not the first, standards organization established for the modern information environment. It has succeeded in bringing together a collaboration of publishers and librarians to develop and maintain the standard for counting the use of electronic resources. It has also ensured that most major publishers and vendors are compliant by providing their library customers around the world with COUNTER usage statistics.

COUNTER publishes the Code of Practice, which is the standard for counting the use of electronic resources. It also maintains and publishes the register of COUNTER-compliant vendors and publishers.

Who uses COUNTER reports?
The COUNTER standard was originally developed to provide a service to librarians and others who purchase subscriptions to publishers’ content. The intention was to allow librarians to easily compare their usage across different publishers’ content, and let them use that information to calculate a cost-per-download for their subscriptions. COUNTER reports were not originally intended to be used by publishers as a way of measuring usage across their client base, but are increasingly being used for that purpose.

Scenario
Camford purchase two subscriptions for 2015: Journal X for £25,000 and Journal Y for £10,000. At the end of the year Camford’s librarian (Barbara) runs a COUNTER JR1 report to check the usage. Journal X is showing 60,000 views and downloads, compared with just 200 for Journal Y. Barbara therefore tells her Head Librarian that while Journal X is more expensive, it has a better cost-per-download... the calculation looks like this:

Journal X: £25,000 / 60,000 = £0.42 per use
Journal Y: £10,000 / 200 = £50 per use

If Camford have to choose a journal to cancel, it’s likely to be Journal Y.

All academic libraries across the world use COUNTER usage reports to:
• Inform renewal decisions based on COUNTER data about well-used content
• Inform new purchasing decisions based on COUNTER data about access denied as the result of a content item not being licensed or because concurrent/simultaneous user licence limits were exceeded
• Inform faculty about the value of the library and its resources
• Understand user behaviour and improve the user experience
Most major vendors and publishers also use COUNTER reports to:
• Provide reliable and consistent usage data to their customers
• Upsell using COUNTER data about access denied as the result of a content item not being licensed or because concurrent/simultaneous user licence limits were exceeded.
• Inform editors and authors about the usage of their publications

How is COUNTER funded and organized?
COUNTER is a not-for-profit membership organization, funded by membership fees and sponsorship.

The membership – publishers, vendors and librarians – leads COUNTER. A Board of Directors has oversight of financial matters and appoints the Executive Committee to oversee the operations. A Project Director, reporting to the Executive Committee, is responsible for the day-to-day management of COUNTER. The publisher, intermediary and librarian communities are all represented on the Board and on the Executive Committee, as well as on the Technical Advisory Board.
How do I become COUNTER Compliant?

Select the usage reports that are relevant to your products

Some of the usage reports are obligatory for COUNTER compliance; these are the ones listed as ‘standard’ in this guide. However, not all the ‘standard’ reports are for the provision of standardized journal usage statistics (JUSP, 2012).

Complete the paperwork

Two pieces of paperwork are needed for COUNTER compliance: you need to become a COUNTER member, and to complete the Declaration of COUNTER Compliance. You will find both the Membership Application and the Declaration at the end of this guide.

Undergo an independent audit

You will need to be audited within six months of signing the Declaration of COUNTER Compliance, and annually thereafter. If you are a very small publisher and will find an annual audit particularly difficult, please get in touch with COUNTER to discuss permission to be audited every other year.

Report formats

COUNTER reports are available in two formats: delimited files, which are readable using Excel and similar spreadsheet tools, and XML, which is delivered using SUSHI.

Delimited files

With the exception of consortia reports, the reports specified in COUNTER release 4 can all be delivered as delimited files:

- Comma separated, or .csv
- Tab separated, or .tsv

Delimited files can be opened and read in all spreadsheet tools, including Excel, OpenOffice Calc, Google Sheets and Numbers for Mac.

Send your reports to COUNTER

Provide the auditor with access to the COUNTER reports. COUNTER will arrange a library test site to check them before they are made live: this usually takes between seven and ten days. Alternatively, one of the COUNTER-approved auditors will check them for a modest fee.

Send your reports to COUNTER

The information in this guide, and for the full specification, will help you.

Enable SUSHI

There is a brief introduction to SUSHI (Standardized Usage Statistics Harvesting Initiative) in this guide, and more information at http://www.niso.org/workrooms/sushi/.

SUSHI

Enable SUSHI

The Standardized Usage Statistics Harvesting Initiative (SUSHI) protocol is an ANSI/NISO standard designed to work with COUNTER usage statistics. It enables the fast and efficient collection of usage statistics. SUSHI allows libraries and providers of content-consolidation products to download quality-checked data from many publishers, removing the need to visit numerous websites.

The SUSHI protocol is designed to simplify the gathering of usage statistics by librarians, and it uses a series of XML schemas to do this. For the purposes of COUNTER release 4, all are intended in only two of these:

- the core SUSHI schema, which is generalised to maintain any compatible XML-formated usage statistics reports
- the COUNTER-SUSHI schema, which references COUNTER to generate XML versions of COUNTER reports

Please see http://www.niso.org/workrooms/sushi/ for more information on SUSHI.

How will my customers know I am COUNTER compliant?

There are two approved COUNTER auditors:

- ABC: http://www.abccouncil.org
- BPA Worldwide: http://www.bpaww.com

COUNTER will also accept an audit by any Chartered Accountant (UK), CPA (USA) or their equivalent elsewhere.

Some of the usage reports are obligatory for COUNTER compliance; these are the ones listed as ‘standard’ in this guide. However, not all the ‘standard’ reports are obligatory for COUNTER compliance. For example, if you publish full-text journals but no books or databases, you may need to supply the ‘standard’ set of journal reports, but no book or database reports.

The ‘optional’ usage reports are genuinely optional: they are not required for COUNTER compliance. Optional reports are generally those which vendors may not be able to supply for technical reasons, and do not indicate a judgement of value or interest for the report.

Your customers will welcome and use all of the COUNTER reports, whether ‘optional’ or ‘standard’. COUNTER has classified some reports as ‘optional’ in order to minimize the COUNTER audit.

As the range of content types increases, it is not always straightforward to decide which category of COUNTER report should be used. The following definitions may be helpful:

**Book:** A non-serial publication of any length, including reference works. A book may be available in print (in hard or soft covers or in loose-leaf format) or electronic format or only in electronic format.

**Database:** A collection of electronically stored data or unit records (facts, bibliographic data, texts) with a common user interface and software for the retrieval and manipulation of data.

**Journal:** A serial that is a branded and continually growing collection of original articles and some now include supplementary data. You can record the usage of such features in Journal Report 3.

**Supplementary data sets, video clips, etc.:** an online journal can be more than a collection of articles and some now include supplementary data. You can record the usage of such features in Journal Report 3.

Prepare your COUNTER-compliant reports

The information in this guide, and for the full specification, will help you.

How do I find a COUNTER auditor?

How do I become COUNTER Compliant?

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There are five ‘standard’ book reports in COUNTER release 4, and a newly released optional report BR7.

**Item of note:**
- The COUNTER release 4 specification uses ‘Title’ in place of ‘Book Title’.
- Books which are not behind a paywall, including Open Access books, are only included in the report if the same can clearly be associated with an institution, for example through IP recognition.
- Where a user has come from – whether that is from another page on the website or through IP recognition – does not affect recording of book usage.
- The PR1 report is also part of the standard book reports (as well as a database report).

**BR1**
This report is labelled by COUNTER as ‘number of successful title requests by month and by title’ and as such is explicitly used for reporting on book content delivered in sections. It is complemented by BR3 and BR5. If a complete book is viewed or downloaded as a single file, the usage is recorded against BR1, unless the vendor does not offer a BR1, in which case the downloading of a whole book would report in the BR2 as a single request against each of the Book Sections (Chapters).

**What you’ll see and what it means**

<table>
<thead>
<tr>
<th>Date run:</th>
<th>the reporting server date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period covered by the report:</td>
<td>the name of each title for which usage has been recorded in the reporting period</td>
</tr>
<tr>
<td>Institutional identifier:</td>
<td>the publisher’s account ID for the customer</td>
</tr>
<tr>
<td>Customer:</td>
<td>the name of the organization for which the report has been created</td>
</tr>
<tr>
<td>Platform:</td>
<td>the name of the publisher</td>
</tr>
<tr>
<td>Publisher (if different from platform):</td>
<td>the name of the publisher</td>
</tr>
<tr>
<td>Title (column A):</td>
<td>the name of each title for which usage has been recorded in the reporting period</td>
</tr>
<tr>
<td>Section type:</td>
<td>variable by publisher. Chapter, part, unit, etc.</td>
</tr>
<tr>
<td>Month (subsequent columns):</td>
<td>the number of full-text views and downloads for each title in each calendar month of the reporting period</td>
</tr>
<tr>
<td>Reporting period total (column H):</td>
<td>the total number of full-text views and downloads for each title in the reporting period</td>
</tr>
</tbody>
</table>

**How the data is tracked**
When a user requests a page which displays a book section in any file type, the publisher’s reporting database will record that page view for use in BR2. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.

**BR2**
This report is labelled by COUNTER as ‘number of successful section requests by month and by title’ and as such is explicitly used for reporting on book content delivered in sections. It is complemented by BR3, BR4 and BR5. A complete book is viewed or downloaded as a single file, the usage is recorded against BR1, unless the vendor does not offer a BR1, in which case the downloading of a whole book would report in the BR2 as a single request against each of the Book Sections (Chapters).

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When a user requests a page which displays a book section in any file type, the publisher’s reporting database will record that page view for use in BR2. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.

**BR3**
This report is labelled by COUNTER as ‘access denied to content items by month, title and category’. It is used for reporting on book content delivered in sections, and is the counterpart to BR2, which reports on successful access at the same level as BR2 (section level).
### What’s in and what’s out

** Included **
- Book parts (chapters)
- Book metadata
- Article article metadata
- Article article link (e.g. issue contents)
- Multimedialinks
- Supplementary files
- Searches
- Searches small files

** Excluded **
- Book reports
- Book parts (chapters)
- Article article metadata
- Article article link (e.g. issue contents)
- Searches
- Searches small files

### What you’ll see and what it means

** Included **
- Book parts (chapters)
- Searches
- Searches small files

** Excluded **
- Book reports

### Things to note

- **Access denied: content item not licensed.**
- **Access denied: concurrent/simultaneous user license limit exceeded.**
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### How the data is tracked

When a user who does not have a licence attempts to land on a page which displays full-text content for a book section, they will be redirected to the section metadata view and the publisher's reporting database will record an access denial notice. This type of access denial is listed as 'Access denied: concurrent/simultaneous user license limit exceeded.'

The main other reason for access to be denied is that the institutional subscription has a concurrency limit which has been exceeded. This means that the customer has, for example, a licence that allows for three simultaneous users at once. If four users try to access the book at the same time, one will receive an ‘access denied’ notice. This type of access denial is listed as ‘Access denied: concurrent/simultaneous user license limit exceeded.’

If 'Access denied: content item not licensed' or 'Access denied: concurrent/simultaneous user license limit exceeded' does not apply to a particular platform or product, those rows do not need to be displayed.

### What you’ll see and what it means

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The primary reason for access to be denied is simply that the user does not have a subscription to the content they wish to read. This type of access denial is listed as 'Access denied: content item not licensed.'

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| Search result clicks |...
| Internal visits (e.g. issue contents) |...
| Multimedia |...
| Journal article lists (e.g. issue contents) |...
| Journal article metadata |...
| Journal article full-text |...
| Search result clicks |...

### Things to note

- When a user types a search term into the platform search box and filters their result to a single title, a "regular search" is recorded for use in BR5. Amending the search by showing more results, filtering or otherwise tweaking the results list to a single title, a 'regular search' is recorded for use in BR5. Amending the search by showing more results, filtering or otherwise tweaking the results list to a single title, a 'regular search' is recorded for use in BR5. Amending the search by showing more results, filtering or otherwise tweaking the results list to a single title, a 'regular search' is recorded for use in BR5. Amending the search by showing more results, filtering or otherwise tweaking the results list to a single title, a 'regular search' is recorded for use in BR5. Amending the search by showing more results, filtering or otherwise tweaking the results list to a single title, a 'regular search' is recorded for use in BR5. 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Consortium reports were designed to allow consortia to see usage information from all member institutions in a single report. All of the consortium reports are delivered as XML files, broken down by consortium member, and are not available in .csv (Excel-readable) format.

**CR1**
This report is labelled ‘number of successful full-text journal article or book chapter requests by month and title’. It incorporates information from JR1, BR1 and BR2.

The independent auditor will test CR1 by accessing the XML report and checking that the reported usage for full-text journal articles is as generated by audit tests JR-1-1 and JR-1-2 (which have been performed by two different accounts, and so two different consortium members). Hence, validation of this report requires validation of Report JR-1. A vendor will pass this audit test if their Consortium Report 1 shows totals for full-text article usage that match the total of full-text article usage counted on the auditor’s reports testing Journal Report 1.

There is not an audit requirement to test against the book reports, but the independent auditors will do so if the publisher requests so.

**CR2**
CR2 covers ‘total searches by month and database’. It is a variant of DB1.

**CR3**
This is a consortium-level version of the MR1 report, covering ‘number of successful full multimedia content unit requests by month and collection’.

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**database reports**

There are three ‘standard’ database reports in COUNTER release 4.

**Items of note:**
Database records which are not behind a paywall, including Open Access records, are only included in a database report if the user can clearly be associated with an institution, for example through IP recognition.

Where a user has come from — whether that is another page on the website (e.g. search results) or directly to the article from an external service such as Google — does not affect recording of database usage.

**DB1**
This report is labelled by COUNTER as ‘total searches, result clicks and record views by month and database’. It is very similar to PR1.

---

**What’s in and what’s out**

<table>
<thead>
<tr>
<th>Included</th>
<th>Included</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manual searches</td>
<td>searches</td>
</tr>
<tr>
<td>Journal article metadata</td>
<td>Journal article lists (e.g. issue contents)</td>
</tr>
<tr>
<td>Multimedia views</td>
<td>Supplementary files</td>
</tr>
<tr>
<td>Databases</td>
<td>links</td>
</tr>
<tr>
<td>Books</td>
<td>back parts (chapters)</td>
</tr>
</tbody>
</table>

**What you’ll see and what it means**

**Customer:** the name of the organization for which the report has been created

**Institutional identifier:** the publisher’s account ID for the customer

**Period covered by the report:** reporting server start to end dates, inclusive

**Date run:** reporting server date

**Database (column A):** the name of the database for which the report is being run

**Publisher (column B):** the name of the publisher

**User activity (column C):** the type of activity for each platform

**Reporting period total (column D):** the count of each activity for each platform in the reporting period

**Month (subsequent columns):** the count of each activity for each platform in each calendar month of the reporting period

**Things to note:**
Where databases are hosted independently — that is, on separate platforms — DB1 is essentially interchangeable with PR1.

**How the data is tracked**
When a user types a search term into the platform search box, a ‘regular search’ is recorded for use in DB1. Amending the search by showing more results, filtering
When a user clicks on a result for a given database from the result list displayed by a search or browse action, a ‘result click’ is recorded for use in DB1. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.

When a user views the detailed metadata for a record in the database, a ‘record view’ is recorded for use in DB1. Record views are recorded whether the user has come from an internal search or browse, or an external link. Record views are not views of the full-text. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.

DB2
This report is labelled by COUNTER as ‘access denied by month, database and category’. It complements DB1.

What you’ll see and what it means

Customer: the name of the organization for which the report has been created
Institutional identifier: the publisher’s account ID for the customer
Period covered by the report: reporting server start to end dates, inclusive
Date run: reporting server date
Database (column A): the name of each database for which usage has been recorded in the reporting period
Publisher (column B): the name of the publisher
Platform (column C): the name of the site for which the report is being run

Access denied category (column D): the type of access denial for each database
Reporting period total (column E): the count of each denial category for each database in the reporting period
Month (subsequent columns): the number of denied views and downloads for each denial type and each database in each calendar month of the reporting period.

Things to note
The primary reason for access to be denied is simply that the user does not have a subscription to the content they wish to read. This type of access denial is listed as ‘Access denied: content item not licensed’.

The main other reason for access to be denied is that the institutional subscription has a concurrency limit which has been exceeded. This type of access denial is listed as ‘Access denied: concurrent/simultaneous user licence limit exceeded’.

If ‘Access denied: content item not licensed’ or ‘Access denied: concurrent/simultaneous user licence limit exceeded’ does not apply to a particular platform or product, those rows do not need to be displayed.

How the data is tracked
When a user who does not have a licence attempts to land on a page which displays a database record in any format, they will be redirected to the record metadata view and the publisher’s reporting database will record an access denial for use in DB2. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.

When a user who does have a licence attempts to land on a page which displays a database record in any format, but that user is in excess of the concurrency limit on the licence, they will be redirected to the record metadata view and the publisher’s reporting database will record an access denial for use in DB2. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.

PR1
This report is labelled ‘total searches, result clicks and record views by month and platform’. It replaces an older report called ‘Database Report 3’, which is why PR1 is classified by COUNTER as a database report.

What you’ll see and what it means

Customer: the name of the organization for which the report has been created
Institutional identifier: the publisher’s account ID for the customer
Period covered by the report: reporting server start to end dates, inclusive
Date run: reporting server date
Database (column A): the name of each database for which usage has been recorded in the reporting period
Publisher (column B): the name of the publisher
Platform (column C): the name of the site for which the report is being run

Included

<table>
<thead>
<tr>
<th>Database</th>
<th>Included</th>
<th>Excluded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journal article metadata</td>
<td>Is not a full text</td>
<td></td>
</tr>
</tbody>
</table>
### database reports

**Customer:** the name of the organization for which the report has been created  
**Institutional identifier:** the publisher’s account ID for the customer  
**Period covered by the report:** reporting server start to end dates, inclusive  
**Date run:** reporting server date  
**Platform (column A):** the name of the site for which the report is being run  
**Publisher (column B):** the name of the publisher  
**User activity (column C):** the type of activity for each platform  
**Reporting period total (column D):** the count of each activity for each platform in the reporting period  
**Month (subsequent columns):** the count of each activity for each platform in each calendar month of the reporting period  

**Things to note**  
For platforms which include books, search usage will be recorded in BR5 and not in PR1 when a user filters a search result list to only show results from a single book.

**How the data is tracked**  
When a user types a search term into the platform search box, a ‘regular search’ is recorded for use in PR1. Amending the search by showing more results, filtering or otherwise tweaking the results list counts as an additional search. The searches will be shown in the columns for Reporting Period Total and the relevant calendar month.  

“Searches-federated and automated” refers to usage such as search-engine crawling, as well as federated searches as defined in the section on BR5. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.  

‘Searches-federated and automated’ refers to usage such as search-engine crawling, as well as federated searches as defined in the section on BR5. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.  

‘Searches-federated and automated’ refers to usage such as search-engine crawling, as well as federated searches as defined in the section on BR5. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.  

When a user clicks on a result for a given database from the result list displayed by a search or browse action, a ‘result click’ is recorded for use in PR1. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.  

When a user views a complete record in the database, rather than a summary of the record, a ‘record view’ is recorded for use in PR1. Record views are recorded whether the user has come from an internal search or browse, or an external link. Record views are not views of the full text. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.

### journal reports

**Customer:** the name of the organization for which the report has been created  
**Institutional identifier:** the publisher’s account ID for the customer  
**Period covered by the report:** reporting server start to end dates, inclusive  
**Date run:** reporting server date  
**Platform (column A):** the name of each journal for which usage has been recorded in the reporting period  
**Publisher (column B):** the name of the publisher  
**Journal (column C):** the name of each journal for which usage has been recorded in the reporting period  
**Publisher (column D):** the name of the publisher  
**Platform (column E):** the name of the site for which the report is being run  
**Journal DOI, proprietary identifier, print ISSN and online ISSN (columns D-G):** identifier values for each journal  
**Reporting period total (column H):** the total number of full-text views and downloads for each journal in the reporting period  
**Reporting period HTML (column I):** the number of full-text HTML views for each journal in the reporting period  
**Reporting period PDF (column J):** the number of full-text PDF downloads for each journal in the reporting period  
**Month (subsequent columns):** the number of full-text views and downloads for each journal in each calendar month of the reporting period  

**Things to note**  
The Reporting Period Total recorded in column H is not always the same as the sum of Reporting period HTML plus Reporting period PDF. This occurs when other
How the data is tracked
When a user requests a page which displays full-text HTML for a journal article, the publisher's reporting database will record that view for use in JR1. The usage will be shown in the columns for Reporting Period Total, Reporting Period HTML and the relevant calendar month.

When a user downloads a full-text PDF for a journal article, the publisher's reporting database will record that download for use in JR1. The usage will be shown in the columns for Reporting Period Total, Reporting Period PDF and the relevant calendar month.

When a user downloads a full-text file in any format other than HTML or PDF, the publisher's database will record that download for use in JR1a. The usage will be shown in the columns for Reporting Period Total, Reporting Period PDF and the relevant calendar month.

How the data is tracked
When a user requests a page which displays full-text HTML for a journal article in an archive, the publisher's reporting database will record that page view for use in JR1a. The usage will be shown in the columns for Reporting Period Total, Reporting Period HTML and the relevant calendar month.

When a user requests a page which displays full-text PDF for a journal article in an archive, the publisher's reporting database will record that download for use in JR1a. The usage will be shown in the columns for Reporting Period Total, Reporting Period PDF and the relevant calendar month.

When a user downloads a full-text file in any format other than HTML or PDF, the publisher's database will record that download for use in JR1a. The usage will be shown in the columns for Reporting Period Total, Reporting Period PDF and the relevant calendar month.

Things to note
The Reporting Period Total recorded in column H is not always the same as the sum of Reporting Period HTML plus Reporting Period PDF. This occurs when other formats such as ePub or Mobi are supplied by the publisher and used in preference to HTML and PDF by some customers. COUNTER release 4 does not specify separate columns for these additional formats.

Formats such as ePub or Mobi are supplied by the publisher and used in preference to HTML and PDF by some customers. COUNTER release 4 does not specify separate columns for these additional formats.

This report is labelled 'number of successful full-text requests by month, journal and category'. As with all journal reports, this report is explicitly used for reporting on full-text journal content.

The report is labelled by COUNTER as 'archive access to full-text articles by month, journal and category'. As with all journal reports, this report is explicitly used for reporting on full-text journal content.
**What you’ll see and what it means**

- **Things to note**
  - The primary reason for access to be denied is simply that the user does not have a subscription to the content they wish to read. This type of access denial is listed as 'Access denied: content item not licensed'.
  - The main other reason for access to be denied is that the institutional subscription has a concurrency limit which has been exceeded. This type of access denial is listed as 'Access denied: concurrent/simultaneous user licence limit exceeded'.
  - When a user who does not have a licence attempts to download a full-text PDF for a journal article, they will be redirected to the article metadata view and the publisher’s reporting database will record an access denial for use in JR2. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.

**How the data is tracked**

- **When a user requests a page which displays information about a journal article**, the publisher’s reporting database will record that page view for use in JR3. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.
  - When a user requests a page which displays full-text HTML for a journal article, they will be redirected to the article metadata view and the publisher’s reporting database will record an access denial for use in JR2. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.
  - When a user who does not have a licence attempts to land on a page which displays full-text HTML for a journal article, they will be redirected to the article metadata view and the publisher’s reporting database will record an access denial for use in JR2. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.
  - When a user who does not have a licence attempts to view or download a full-text view for a journal article, they will be redirected to the article metadata view and the publisher’s reporting database will record an access denial for use in JR2. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.

**What’s in and what’s out**

- JR3 only in as much as the data relates specifically to usage on mobile devices (tablet or phone).

**JR3 mobile**

- JR3 mobile contains the same information as JR3, this is an optional report. It differs from JR3 only as much as the data relates specifically to usage on mobile devices (tablet or phone).
### JR4

**JR4 is an optional report, labelled by COUNTER as ‘journal searches run by month and collection’.**

**What's in and what's out**

<table>
<thead>
<tr>
<th>Included</th>
<th>Excluded</th>
</tr>
</thead>
<tbody>
<tr>
<td>All searches</td>
<td>Search result clicks</td>
</tr>
<tr>
<td>Journal article full text</td>
<td></td>
</tr>
<tr>
<td>Journal article metadata</td>
<td></td>
</tr>
<tr>
<td>Journal article lists (e.g. issue contents)</td>
<td></td>
</tr>
<tr>
<td>Multimedia</td>
<td></td>
</tr>
<tr>
<td>Supplementary files</td>
<td></td>
</tr>
<tr>
<td>Books</td>
<td></td>
</tr>
<tr>
<td>Book parts (chapters)</td>
<td></td>
</tr>
<tr>
<td>Databases</td>
<td></td>
</tr>
</tbody>
</table>

**What you’ll see and what it means**

- **Customer:** the name of the organization for which the report has been created
- **Institutional identifier:** the publisher’s account ID for the customer
- **Period covered by the report:** reporting server start to end dates, inclusive

**Data run:** reporting server date

**Collections (column A):** the name of the journal collection for which search usage has been recorded in the reporting period

**Searches run (column B):** no data is held in this column

**Reporting period total (column C):** the total number of searches run for each collection in the reporting period

**Month (subsequent columns):** the number of full-text views and downloads for each journal in each calendar month of the reporting period

**Things to note**

- This report does not include journal-level information about searching, or information about what users do with search results (e.g. result clicks).
- The Total for All Collections recorded in row 9 is not always the same as the sum of other rows. This occurs when a user searches outside of a specific collection and those searches are added to the total.

**How the data is tracked**

When a user searches in a journal-only platform, either manually or using an automated search, a search is recorded for use in JR4. Amending the search by showing more results, filtering or otherwise tweaking the results list counts as an additional search. The searches will be shown in the columns for Reporting Period Total and the relevant calendar month.

Where the journal-only platform is broken down into collections of journals, the search is recorded against the relevant collection.

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### JR5

This report is labelled ‘number of successful full-text article requests by year of publication’. It is similar to JR1a, but is not explicitly for archival use.

**What's in and what's out**

<table>
<thead>
<tr>
<th>Included</th>
<th>Excluded</th>
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</thead>
<tbody>
<tr>
<td>Journal article full text</td>
<td>Journal article metadata</td>
</tr>
<tr>
<td>Journal article lists (e.g. issue contents)</td>
<td>Multimedia</td>
</tr>
<tr>
<td>Supplementary files</td>
<td>Books</td>
</tr>
<tr>
<td>Book parts (chapters)</td>
<td>Databases</td>
</tr>
<tr>
<td>Searches</td>
<td>Search result clicks</td>
</tr>
</tbody>
</table>

**What you’ll see and what it means**

- **Customer:** the name of the organization for which the report has been created
- **Institutional identifier:** the publisher’s account ID for the customer
- **Period covered by the report:** reporting server start to end dates, inclusive

**Data run:** reporting server date

**Journal (column A):** the name of each journal for which usage has been recorded in the reporting period

**Publisher (column B):** the name of the publisher

**Platform (column C):** the name of the site for which the report is being run

**Period covered by the report:** reporting server start to end dates, inclusive

**Date run:** reporting server date

**Articles in press:** the number of full-text views and downloads during the reporting period for articles in each journal which have not yet been assigned a year of publication (e.g. ‘published online ahead of print’)

**YOP xxxx (subsequent columns):** the number of full-text views and downloads during the reporting period for each journal, by the year of publication

**Things to note**

- ‘YOP pre-2000’ is a COUNTER standard term: some JR5 reports will break out separate years of publication prior to 2000, others will aggregate all pre-2000 years of publication into a single column. Both are acceptable.
- ‘YOP unknown’ is used for articles which do not include explicit information regarding year of publication.
- Articles which have ambiguous data regarding year of publication are recorded with a year of publication that matches the latest year listed in the article metadata (i.e. an article with a publication date of ‘2014/2015’ will be recorded for JR5 with a year of publication of 2015).

**How the data is tracked**

When a user requests any page which displays full text for a journal article, whether that is HTML, PDF or any other format, the publisher’s reporting database will record that page view for use in JR5. The usage will be shown in the relevant YOP column.
There are two multimedia reports in COUNTER release 4; MR1 is ‘standard’ and MR2 is ‘optional’.

**Items of note**

- Multimedia means items of non-textual media content such as images, maps, streaming or downloadable audio or video files.
- Multimedia items which are not behind a paywall, including Open Access items, are only included in a multimedia report if the user can clearly be associated with an institution, for example through IP recognition.
- Where a user has come from – whether that is another page on the website (e.g. search results) or directly to the article from an external service such as Google – does not affect recording of multimedia usage.

**MR1**

This report is labelled by COUNTER as ‘number of successful full multimedia content unit requests by month and collection’.

**What’s in and what’s out**

- **Included**
  - Multimedia
- **Excluded**
  - Books
  - Book parts (chapters)
  - Full-text articles (e.g. reference lists, journal article data)
  - Supplementary files
  - Databases
  - Searches
  - Search full-text

**What’s in and what’s out**

Customer: the name of the organization for which the report has been created

Institutional identifier: the publisher’s account ID for the customer

Period covered by the report: reporting server start to end dates, inclusive

Date run: reporting server date

Collection (column A): the name of each multimedia collection for which usage has been recorded in the reporting period

Content provider (column B): the name of the publisher

Platform (column C): the name of the site for which the report is being run

Reporting period total (column D): the total number of successful full multimedia content requests for each collection in the reporting period

Month (subsequent columns): the number of full-text views and downloads for each title in each calendar month of the reporting period

**Things to note**

MR1 is used to report on usage of standalone multimedia items. Usage of multimedia items which are part of another content unit (e.g. viewing a video which is a supplementary file for a journal article) is not counted for the purposes of MR1. How the date is treated

When a user requests a page which displays or plays a standalone multimedia file of any type, the publisher’s reporting database will record that page view for use in MR1. The usage will be shown in the columns for Reporting Period Total and the relevant calendar month.

**MR2**

An optional report, MR2 is described by COUNTER as ‘number of successful full multimedia content unit requests by month, collection and item type’. It combines the detail of JR1 with the multimedia focus of MR1.

**Title reports**

All of the title reports in COUNTER release 4 are ‘optional’. Title reports were designed to allow optional simultaneous reporting of book and journal content for platforms which support both content types. Because title reports are typically very large, like the consortium reports they are provided only in XML format.

**Items of note**

- Title reports include a ‘total for all titles’ section as well as information about individual journals and books.
- Items which are not behind a paywall, including Open Access items, are only included in a title report if the user can clearly be associated with an institution, for example through IP recognition.
- Where a user has come from – whether that is another page on the website (e.g. search results) or directly to the article from an external service such as Google – does not affect recording of multimedia usage.

**TR1**

TR1 is an optional report labelled ‘number of successful requests for journal full-text articles and book sections by month and title’. Total views, HTML views and PDF views are separated out for each title, as with JR1.

**TR1m**

Like TR1, this optional report is labelled ‘number of successful requests for journal full-text articles and book sections by month and title’ but it contains exactly the same information as TR1, but is formatted both for normal browsers and for reading off/ delivery to mobile devices.
This is an optional report labelled by COUNTER as ‘access denied to full-text items by month, title and category’. It is the title-level counterpart of JR2.

This optional report is labelled by COUNTER as ‘number of successful item requests by month, title and page type’. It is a title-level counterpart of JR3, and is thus highly granular.

Like TR3, the TR3m optional report is labelled ‘number of successful item requests by month, title and page type’. It contains exactly the same information as TR3, but is formatted both for normal browsers and for reading on/delivery to mobile devices.

We hereby confirm the following:

1. That the online usage reports which are supplied by The Company to its customers, and which The Company claims to be ‘COUNTER compliant’, conform to Release 4 of the COUNTER Code of Practice for E-resources.
2. The Company agrees that it will implement the protocols specified in Section 5 of Release 4 of the Code of Practice to correct for the effects of federated searches and internet robots on usage statistics.
3. Where The Company supplies to customers online usage statistics not included in the usage reports covered in 1 above, but which use terms defined in the COUNTER Code of Practice, that the definitions used by The Company are consistent with those provided in the COUNTER Code of Practice.
4. The Company will pay to COUNTER the Vendor Registration Fee (£250/US$500), unless The Company is a Member of COUNTER in good standing, for whom this fee is waived.
5. That to maintain COUNTER-compliant status, the usage reports provided by The Company to its customers will be independently audited according to a schedule and standards specified by COUNTER.

Signed: 

Name: 

For and on behalf of vendor/aggregator/gateway: 

Address: 

Email address: 

Upon receipt of this signed Declaration by the COUNTER office, and upon payment (where the Company is not a member of COUNTER) by The Company of the Vendor Membership Fee, The Company will be listed on the Register of Vendors Providing COUNTER-compliant Usage Reports.

This Declaration may be signed, scanned and emailed to: lorraine.estelle@counterusage.org
application for COUNTER membership

COUNTER is a non-profit organization funded through organizational membership. To sustain the continued improvement of online usage statistics and usage-based metrics, we rely on membership funding from vendors, publishers, libraries and library consortia. See below for a full list of member categories.

To apply, please complete this form.

Name of organization: 

Currency Options

Please invoice in the following currency:

Please tick your option

Sterling - £

US Dollars – US$

Address: 

Zip or post code: 

Email address: 

Name of primary contact: 

Category

Annual Fee 2016

Please tick your category

Large Vendor/Publisher

(annual revenues more than £9.25 million/US $14 million)

£ 796/$1200

Medium Vendor/Publisher

(annual revenues less than £9.25 million/US $14 million but more than £6.5 million/US $10 million)

£641/$1000

Smaller Vendor/Publisher

(annual revenues less than £6.5 million US $10 million)

£391/$587

Pro-rated membership: New memberships that begin after 30 March 2016 will be pro-rated for the remaining calendar term: the annual figure will be divided by 12 and multiplied by the number of months remaining in the year. New memberships that begin after 30 June 2016 will be pro-rated for the remaining calendar term and the standard 2016 membership rate added for 2017.

The completed application form may be scanned and emailed to:

lorraine.estelle@counterusage.org

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About the author:

Tasha Mellins-Cohen is the Head of Platform at Semantico in Brighton, England.

Prior to joining Semantico Tasha worked for a variety of publishers, from small societies to large commercial units, with a focus on optimising the operational aspects of scholarly publishing. She has extensive experience of the full publishing life-cycle for both journals and books, from submission and peer review through to production and downstream data feeds. This has covered working with client publishers, offshore suppliers and end users. She is also a member and deputy Chair of the COUNTER Technical Advisory Group.

On the technology front, Tasha was involved with a number of new hosting platform builds and migrations, as well as workflow builds, and has now brought that experience to bear in her role at Semantico.

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for supporting the creation of the text.

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