RELEASE 5
MANUAL FOR LIBRARIANS

Books: Understanding metrics and standard views

Module 1: Book Usage

John Hendry

COUNTER

CONTENTS

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 books.

It highlights the key reports and explains the different metrics within them.

We shall see:

- the key metrics that show activity for each book.
- most importantly, how to calculate usage per book — regardless of how the platform presents its books.
- the three main COUNTER reports relevant to books.
- how to track trends by comparing the correct figures between Release 4 and Release 5 reports.

WHAT IS COUNTED

Every book has a unique identifier — an ISBN. For each ISBN, COUNTER records how often a user clicks to see if they are interested in the book, and how often they click to read the book.

In short, we count two types of click:

- **Interest clicks** — where the user wants to know if the book might or might not be worth reading. These are counted in our **Investigation** metrics.

- **Usage clicks** — where the user has clicked to *download and view* all or part of the book. These are counted in our **Request** metrics.

COUNTER does not measure how long any content is viewed. We cannot measure whether the user has actually read the text.

ITEM METRICS

Let us look at four key metrics so that we can understand them in more detail.

- **Total_Item_Investigations**
- **Total_Item_Requests**
- **Unique_Item_Investigations**
- **Unique_Item_Requests**

For books, an item can be either a whole book or part of a book (typically, a chapter).

TOTAL METRICS: INVESTIGATIONS AND REQUESTS

As we have said before, **Investigation** metrics count the clicks where the user wants to know more about a book.
Example: **Total_Item_Investigations.**

Request metrics are indicative of usage. They count the clicks where the user downloads all or part of a book for viewing. This could be a click to view content in HTML, pdf or ePub format.
Example: **Total_Item_Requests.**

For example, if a user clicks to view the summary of a book, but then does not click to download and view the content:

Total_Item_Investigations = 1

Total_Item_Requests = 0

In principle, any click to download and view content of a book is also a type of investigation. So, COUNTER counts a click to download as both an Investigation and a Request.

For example, the user clicks to view the summary of a book, and then clicks to download and view the content:

Total_Item_Investigations = 2

Total_Item_Requests = 1

The Investigations metric is set to 2, because both clicks are counted as investigations.

The Requests metric is set to 1, because the content has only been downloaded for viewing once.

UNIQUE METRICS

Unique metrics enable you to understand interest (**Investigations**) and usage (**Requests**) in a different way from the Total metrics we have just looked at.

Total metrics count every click — either as an Investigation or as both an Investigation and a Request. That is what we saw above.

Unique metrics are designed to avoid double-counting. If a user clicks to download a book as a pdf and then clicks again to download it as ePub, the **Unique_Item_Requests** metric only records the first click. The second click is ignored (whereas the **Total_Item_Requests** metric records both downloads).

The point of the Unique metrics is that they simply measure whether or not the user has investigated or downloaded the book. We shall look at this in more detail later, but here is a simple example:

A user clicks to view the summary of a book and then clicks to download content.

- The **Unique_Item_Investigations** metric is set to 1. Although the second click is also an Investigation, it is for the same book, so it is not unique. It is not counted.

- The **Unique_Item_Requests** metric is set to 1 when the user downloads at the second click. Any further clicks to download content of the book (for example, in a different format) will not be counted.

BOOKS AND SECTIONS

Before we look at some practical examples, note that some platforms only provide books as single files for downloading, whereas other platforms enable you to download specific sections or chapters as separate files.

So an Item can be a book or a chapter (as we noted earlier).

A PRACTICAL EXAMPLE

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

A reader is looking at the book *Ophthalmic Medical Image Analysis* on Platform A. On this platform, it is possible to download different chapters separately or to download the whole book as a single file. It also enables you to download the files in three different formats: html, pdf and ePub.

1. First, she clicks on the tab **About these proceedings**. This displays further information about the book, including links to content.

2. The second click is on the link for **Dictionary Learning Informed Deep Neural Network…** This opens the content of the chapter in html form.

3. The third click is on the link (in the right-hand column) to the pdf for that same chapter. This downloads and opens the content of the chapter in pdf form.

4. The fourth click is on the link (in the right-hand column) to the pdf for the chapter **Structure-Aware Noise Reduction Generative Adversarial Network…** This opens the content of the chapter in pdf form.

5. The fifth click is at the top of the page on the button **Download book PDF**. This opens the whole book in pdf form.

Now let us see how these clicks are logged by the Total and Unique metrics.

Total_Item_Investigations

For this metric, every single click is counted, because all five clicks are an investigation of the book. So the final count for the metric is 5.

Metric	Click 1	Click 2	Click 3	Click 4	Click 5	Total
Total_Item_Investigations	✔	✔	✔	✔	✔	**5**

Unique_Item_Investigations

This metric counts the number of times the book is investigated, but only once per user session. This includes clicks to find out more and clicks to download content.

- The first click is counted, because it is an investigation of the book.
- Clicks two and three download the same part of the book, so only the first of these clicks is counted.
- The fourth click downloads a different chapter, so this is counted.
- The final click downloads the whole book. This is an Investigation of the book and a Request — but both of these have already been counted — so this final click is not counted.

That adds up to a total count of 3 for the metric.

Metric	Click 1	Click 2	Click 3	Click 4	Click 5	Total
Unique_Item_Investigations	✔	✔	—	✔	—	**3**

Total_Item_Requests

This metric counts the number of times the actual content of the book is downloaded for viewing. The first click is only an investigation. But each of the other four clicks downloads content of the book for viewing. So the final count for the metric is 4.

Metric	Click 1	Click 2	Click 3	Click 4	Click 5	Total
Total_Item_Requests	—	✔	✔	✔	✔	**4**

Unique_Item_Requests

This is where it is important to remember that an Item can either be a book or a chapter. This metric counts the number of times a complete book or a specific chapter of the book is viewed or downloaded — but it only counts each of these only once during the session.

- Click one is only an investigation, so it is not counted.
- Clicks two and three download the same chapter of the book, so only the first click is counted.
- The fourth click downloads a different chapter, so this is counted.
- And the final click downloads the whole book, which also counts as a unique item.

That adds up to a total count of 3 for the metric.

Metric	Click 1	Click 2	Click 3	Click 4	Click 5	Total
Unique_Item_Requests	—	✔	—	✔	✔	**3**

TITLE METRICS

Let us look at two more metrics. These are only used for books, and they measure books as a single item, regardless of whether the book is available only as a single file or in separate chapters.

- **Unique_Title_Investigations.** This metric counts the first click on a book by a specific user. Any further clicks on the same book during the session are not counted.

  In short, this records that the user was interested in the book. It does not measure the amount of interest.

- **Unique_Title_Requests.** This metric counts the first click to download and view a book by a specific user. If the user clicks to download the book again during the session, or clicks to download a different chapter of the same book, this is not counted.

  This measures usage of a book by a user. It does not measure the *amount* of usage, such as the number of chapters downloaded for viewing.

The important thing here is that the **Unique_Title_Requests** metric enables you to work out cost per usage across the two main types of platforms used.

CALCULATING COST PER USE

To start, we shall consider the two main types of platform for viewing books:

- Platforms that deliver books as separate chapters

- Platforms that deliver books only as single pdf files

Imagine a book with 27 separate chapters.

- On Platform A, the user clicks on each of the 27 chapters to download and view separately. The **Total_Item_Requests** count for the book is 27.

- On Platform B, the user would click once to download the book. Assuming that is the only click, then the **Total_Item_Requests** count for the book is 1.

That makes it difficult to calculate cost per usage, because **Total_Item_Requests**, does not give you comparable data between the two platforms. The 27 clicks versus 1 is a reflection of the two user interfaces, not usage of the book.

So, the **Unique_Title** metrics were created to give you a consistent way of calculating cost per use for titles, regardless of which platform is used.

If you are looking to measure cost per usage, then use the **Unique_Title_Requests** metric.

A PRACTICAL EXAMPLE

Now let us go back to our example of the reader looking at the book *Ophthalmic Medical Image Analysis* on Platform A. For now, let us concentrate on the first three clicks.

1. First, she clicks on the tab **About these proceedings**. This displays further information about the book, including links to content.

2. The second click is on the link for **Dictionary Learning Informed Deep Neural Network…** This opens the content of the chapter in html form.

3. The third click is on the link (in the right-hand column) to the pdf for that same chapter. This opens the content of the chapter in pdf form.

Now let us look at our two metrics.

Unique_Title_Investigations

This measures interest in a book, not actual usage.

- The first click is counted, because it is an expression of interest in the book.
- The next two clicks are a repeat of interest in the same book — so they are not counted. No further interest clicks from this session for this book are counted.

The final count for the metric is 1.

Metric	Click 1	Click 2	Click 3	Total
Unique_Title_Investigations	✔	—	—	**1**

Unique_Title_Requests

This metric measures usage of the book — where content is downloaded for viewing.

- The first click is purely an expression of interest. It is not counted as a request.
- The second click downloads content of the book for viewing — so it is counted.
- Click three downloads content for the same book, so it is not counted. No further clicks to download during this session for this book are counted.

The final count for the metric is 1.

Metric	Click 1	Click 2	Click 3	Total
Unique_Title_Requests	—	✔	—	**1**

SESSIONS

When a user logs on to the platform, a session begins. The session ends when the user logs off again, or if the user is logged off automatically.

So, in our example above, the user has a count of:

Unique_Title_Investigations = 1

Unique_Title_Requests = 1

The Unique metrics count the number of unique clicks *in a session*. If the user then logs out and logs back in again, a new session begins. And if the user downloads content from the same book during the new session, the first click is counted again.

The difference is this:

- If the user downloads and views content of the book twice, three times or a hundred times in a single session, the unique metrics for the book stay at 1. The total for each metric so far is 1.
- If the user downloads content for the same book in a second session, then another count of 1 is added for both metrics. The total for the metrics now consists of this session and the earlier one; 1 + 1 = 2. We shall see this when we look at example reports.

There is more information about sessions in the section *Hourly Sessions*, later in this manual.

For book usage, there is one report in Release 5 that shows all the metrics we have discussed here. This is the Title Master Report.

TITLE MASTER REPORT AND Section_Type

When you use the Title Master Report to check book usage, look out for the **Section_Type**. This informs you whether you are measuring usage by specific chapters or by whole books.

Consider a book with 18 chapters. Platform A provides this book as separate files for each chapter.

Our Title Master Report for Platform A (with some columns hidden) looks like this:

Title	Platform	ISBN	Data_Type	Section_Type	Metric_Type	Reporting_Period_Total
Pulsar Emission Physics	Platform A	978-0-300-14424-6	Book	Chapter	Total_Item_Requests	18 ←
Pulsar Emission Physics	Platform A	978-0-300-14424-6	Book	Chapter	Unique_Item_Requests	18 ←
Pulsar Emission Physics	Platform A	978-0-300-14424-6	Book	Chapter	Unique_Title_Requests	1 ←

- Note that the **Section_Type** here is **Chapter**.
- In this example, a user has downloaded all the chapters, so the count for both **Total_Item_Requests** and **Unique_Item_Requests** is 18.
- The **Unique_Title_Requests** count is 1, so all these downloads were from a single session.

Now imagine the same book on Platform B, where it can only be downloaded as a single file. Our Title Master Report for Platform B (with some columns hidden) looks like this:

Title	Platform	ISBN	Data_Type	Section_Type	Metric_Type	Reporting_Period_Total
Pulsar Emission Physics	Platform B	978-0-300-14424-6	Book	Book	Total_Item_Requests	1 ←
Pulsar Emission Physics	Platform B	978-0-300-14424-6	Book	Book	Unique_Item_Requests	1 ←
Pulsar Emission Physics	Platform B	978-0-300-14424-6	Book	Book	Unique_Title_Requests	1

- Note that the **Section_Type** here is **Book**. This time, the user has clicked once to download and view the whole book. So the count for both **Total_Item_Requests** and **Unique_Item_Requests** is 1 in this case.
- Also, note that **Unique_Title_Requests** has worked consistently on both platforms, recording that the book has been used once.

Finally, note that the **Section_Type** column is **not** included in any of the standard views of the Title Master Report, which will shall now look at.

STANDARD VIEWS

As for all COUNTER reports, the Title Master Report can be filtered so that you see only what you need and exactly what you need. However, more conveniently, there are three standard views relating to book usage of this report:

- **TR_B1** shows unique and total requests
- **TR_B2** shows access denied
- **TR_B3** shows usage of controlled and uncontrolled books. Controlled books are available only to library users where the library has purchased or licensed the books. Uncontrolled books are available to everyone and can be downloaded freely. Effectively, controlled books are paid for and uncontrolled books are free to use (subject to the usual copyright laws).

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

TR_B1 — Book Requests (Excluding OA_Gold)

This standard view shows books that include controlled content, where the content has been used during the reporting period.

It shows usage of each book in terms of unique requests and total requests.

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

							Reporting	Jan-2018	Feb-2018	Mar-2018
1	Report_Name	Book Requests (Excluding OA_Gold)								
2	Report_ID	TR_B1								
3	Release	5								
4	Institution_Name	Client Demo Site								
5	Institution_ID	ISNI:000000012150090X								
6	Metric_Types	Total_Item_Requests; Unique_Title_Requests								
7	**Report_Filters**	Access_Method=Regular; Access_Type=Controlled; Data_Type=Book								
8	Report_Attributes									
9	Exceptions									
10	**Reporting_Period**	Begin_Date=2018-01-01; End_Date=2018-03-31								
11	Created	2019-04-25T11:40:38Z								
12	Created_By	Scholarly iQ for Sample Publisher								
13										
14	Title	Publisher	Platform	ISBN	YOP	Metric_Type	Reporting	Jan-2018	Feb-2018	Mar-2018
15	Ophthalmic Medical image	Springer	Platform 1	978-0-300-	2008	Total_Item_Requests	6	2	0	4
16	Ophthalmic Medical image	Springer	Platform 1	978-0-300-	2008	Unique_Title_Requests	3	2	0	1
17	HOPS complex	Xerxes	Platform 1	978-0-300-	2008	Total_Item_Requests	1	0	0	1
18	HOPS complex	Xerxes	Platform 1	978-0-300-	2008	Unique_Title_Requests	1	0	0	1
19	Misregulation of autophag	Ind Rev	Platform 1	978-0-300-	2008	Total_Item_Requests	5	4	1	0
20	Misregulation of autophag	Ind Rev	Platform 1	978-0-300-	2008	Unique_Title_Requests	4	3	1	0
21	Types of Autophagosome-	Gander	Platform 1	978-0-300-	2008	Total_Item_Requests	14	4	4	6
22	Types of Autophagosome-	Gander	Platform 1	978-0-300-	2008	Unique_Title_Requests	14	4	4	6

Note the following:

- At the top of the file, the heading shows the period that is covered by the report in **Line 10**. In this example, we are covering the first three months of 2018.
- **Line 7** shows you the filters that are used for this view: The key one here is **Access_Type** = **Controlled**, which ensures you only see books with controlled access on this list. *Controlled* means that the books are only available to readers who have logged on with the correct permissions.

	Report_Name	Book Requests (Excluding OA_Gold)								
1	Report_Name	Book Requests (Excluding OA_Gold)								
2	Report_ID	TR_B1								
3	Release	5								
4	Institution_Name	Client Demo Site								
5	Institution_ID	ISNI:000000012150090X								
6	Metric_Types	Total_Item_Requests; Unique_Title_Requests								
7	Report_Filters	Access_Method=Regular; Access_Type=Controlled; Data_Type=Book								
8	Report_Attributes									
9	Exceptions									
10	Reporting_Period	Begin_Date=2018-01-01; End_Date=2018-03-31								
11	Created	2019-04-25T11:40:38Z								
12	Created_By	Scholarly iQ for Sample Publisher								
13										
14	**Title**	**Publisher**	**Platform**	**ISBN**	**YOP**	**Metric_Type**	**Reporting**	**Jan-2018**	**Feb-2018**	**Mar-2018**
15	Ophthalmic Medical image	Springer	Platform 1	978-0-300-	2008	Total_Item_Requests	6	2	0	4
16	Ophthalmic Medical image	Springer	Platform 1	978-0-300-	2008	Unique_Title_Requests	3	2	0	1
17	HOPS complex	Xerxes	Platform 1	978-0-300-	2008	Total_Item_Requests	1	0	0	1
18	HOPS complex	Xerxes	Platform 1	978-0-300-	2008	Unique_Title_Requests	1	0	0	1
19	Misregulation of autophag	Ind Rev	Platform 1	978-0-300-	2008	Total_Item_Requests	5	4	1	0
20	Misregulation of autophag	Ind Rev	Platform 1	978-0-300-	2008	Unique_Title_Requests	4	3	1	0
21	Types of Autophagosome-	Gander	Platform 1	978-0-300-	2008	Total_Item_Requests	14	4	4	6
22	Types of Autophagosome-	Gander	Platform 1	978-0-300-	2008	Unique_Title_Requests	14	4	4	6

- For each book, there are two lines: the first shows **Total_Item_Requests** and the second shows **Unique_Title_Requests**.
- The three columns to the right show the metrics for each month. **Reporting_Period_Total** is simply a total of the three months.

Now let us focus on the books listed and see the metrics in action. To do this, we have hidden more columns to simplify things.

First, look at the book on Ophthalmic Medical Image Analysis.

	Title	Metric_Type	Reporting_Period_Total	Jan-2018	Feb-2018	Mar-2018
14						
15	Ophthalmic Medical	Total_Item_Requests	6	2	0	4
16	Ophthalmic Medical	Unique_Title_Requests	3	2	0	1
17	HOPS complex	Total_Item_Requests	1	0	0	1
18	HOPS complex	Unique_Title_Requests	1	0	0	1
19	Misregulation of aut	Total_Item_Requests	5	4	1	0
20	Misregulation of aut	Unique_Title_Requests	4	3	1	0
21	Types of Autophagos	Total_Item_Requests	14	4	4	6
22	Types of Autophagos	Unique_Title_Requests	14	4	4	6

- **Line 15** is **Total_Item_Requests**. This tells us that there were two downloads of this book or parts of the book in January.
- **Line 16** is **Unique_Title_Requests**. This tells us that content was downloaded for viewing on two separate occasions (or sessions). So the book was used twice in January.
- Now look at the figures for the book in March. **Total_Item_Requests** is 4 — so content was downloaded for viewing 4 times that month. However, **Unique_Title_Requests** is 1. So, all those requests were in a single session. The book was used only once in March.
- Finally, note the totals: for the three months, there have been 6 **Total_Item_Requests** and 3 **Unique_Title_Requests.** The book was used three times over the period.

Now let us move to the book on Misregulation of autophagy

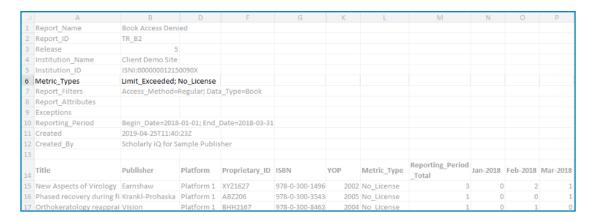|	Title	Metric_Type	Reporting_Period_Total	Jan-2018	Feb-2018	Mar-2018
15	Ophthalmic Medical	Total_Item_Requests	6	2	0	4
16	Ophthalmic Medical	Unique_Title_Requests	3	2	0	1
17	HOPS complex	Total_Item_Requests	1	0	0	1
18	HOPS complex	Unique_Title_Requests	1	0	0	1
19	Misregulation of aut	Total_Item_Requests	5	4	1	0
20	Misregulation of aut	Unique_Title_Requests	4	3	1	0
21	Types of Autophago:	Total_Item_Requests	14	4	4	6
22	Types of Autophago:	Unique_Title_Requests	14	4	4	6

- February shows **Total_Item_Requests** is 1 and **Unique_Title_Requests** is 1. The book was used once that month.
- January shows **Total_Item_Requests** is 4 and **Unique_Title_Requests** is 3. From this, we can see that in one session, content was downloaded for viewing twice — the second click was not counted in **Unique_Title_Requests**. With no usage in March, that gives us a total usage of 4 for the period covered by the report (in the column **Reporting_Period_Total**).

That should give you an understanding of the two metrics in practice. **Total_Item_Requests** indicates activity, but remember that **Unique_Title_Requests** gives you a usage value that you can use to count consistently between the two main types of platform.

TR_B2 — Book Access Denied

This standard view shows instances where users have been unable to gain access to content. This enables you to see demand for books that you might want to subscribe to in the future.

	A	B	D	F	G	K	L	M	N	O	P
1	Report_Name	Book Access Denied									
2	Report_ID	TR_B2									
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=Book									
8	Report_Attributes										
9	Exceptions										
10	Reporting_Period	Begin_Date=2018-01-01; End_Date=2018-03-31									
11	Created	2019-04-25T11:40:23Z									
12	Created_By	Scholarly iQ for Sample Publisher									
13											
14	Title	Publisher	Platform	Proprietary_ID	ISBN	YOP	Metric_Type	Reporting_Period_Total	Jan-2018	Feb-2018	Mar-2018
15	New Aspects of Virology	Earnshaw	Platform 1	XYZ1627	978-0-300-1496	2002	No_License	3	0	2	1
16	Phased recovery during fi	Krankl-Prohaska	Platform 1	ABZ206	978-0-300-3543	2005	No_License	1	0	0	1
17	Orthokeratology reapprai	Vision	Platform 1	BHH2167	978-0-300-8462	2004	No_License	1	0	1	0

Here is an example. For convenience, we have hidden some of the columns from view.
Line 6 indicates the two types of access refusal that are logged:

- **Limit_Exceeded**. Some licenses only allow a maximum number of simultaneous accesses to a platform. This metric indicates where that limit has been exceeded.
- **No_License**. This indicates where a user has attempted to view content of book, and your institution has no license to view that content.

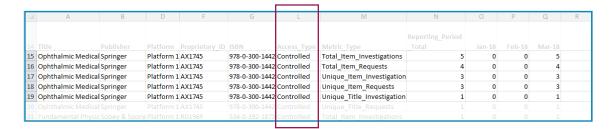|	Title	Publisher	Platform	Proprietary_ID	ISBN	YOP	Metric_Type	Reporting_Period _Total	Jan-2018	Feb-2018	Mar-2018
1	Report_Name	Book Access Denied									
2	Report_ID	TR_B2									
3	Release	5									
4	Institution_Name	Client Demo Site									
5	Institution_ID	ISNI:000000012150090X									
6	Metric_Types	Limit_Exceeded; No_License									
7	Report_Filters	Access_Method=Regular; Data_Type=Book									
8	Report_Attributes										
9	Exceptions										
10	Reporting_Period	Begin_Date=2018-01-01; End_Date=2018-03-31									
11	Created	2019-04-25T11:40:23Z									
12	Created_By	Scholarly iQ for Sample Publisher									
13											
15	New Aspects of Virology	Earnshaw	Platform 1	XYZ1627	978-0-300-1496	2002	No_License	3	0	2	1
16	Phased recovery during fi	Krankl-Prohaska	Platform 1	ABZ206	978-0-300-3543	2005	No_License	1	0	0	1
17	Orthokeratology reapprai	Vision	Platform 1	BHH2167	978-0-300-8462	2004	No_License	1	0	1	0

- We can see in this example that one or more people have tried to read the first book, New Aspects of Virology, for which you have no license. There were two attempts in February and one in March.
- There are only three books in the report for this period. Nobody has been refused access because of **Limit_Exceeded** during the period.

TR_B3 — Book Usage by Access Type

This report shows usage of books organised by access type. It enables you to see usage of books that are only accessible by users with a valid login (**Access_Type = Controlled**), as well as books that are freely available.

For each book that has been looked at by your users, this standard view shows all 6 of the metrics we have discussed in this guide.

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

	Title	Publisher	Platform	Proprietary_ID	ISBN	Access_Type	Metric_Type	Reporting_Period Total	Jan-18	Feb-18	Mar-18	
15	Ophthalmic Medical	Springer	Platform 1	AX1745	978-0-300-1442	Controlled	Total_Item_Investigations	5	0	0	5	
16	Ophthalmic Medical	Springer	Platform 1	AX1745	978-0-300-1442	Controlled	Total_Item_Requests	4	0	0	4	
17	Ophthalmic Medical	Springer	Platform 1	AX1745	978-0-300-1442	Controlled	Unique_Item_Investigation	3	0	0	3	
18	Ophthalmic Medical	Springer	Platform 1	AX1745	978-0-300-1442	Controlled	Unique_Item_Requests	3	0	0	3	
19	Ophthalmic Medical	Springer	Platform 1	AX1745	978-0-300-1442	Controlled	Unique_Title_Investigation	1	0	0	1	
20	Ophthalmic Medical	Springer	Platform 1	AX1745	978-0-300-1442	Controlled	Unique_Title_Requests	1	0	0	1	
21	Fundamental Physic	Sobey & Spong	Platform 1	RD1969	534-0-392-1872	Controlled	Total_Item_Investigations	1	0	0	1	

- In this example, we can see our book on Ophthalmic Medical Image Analysis. Note that the five clicks in the example we discussed earlier are logged here in the 6 metrics.
- Note **column L** shows Access_Type. In this example, all our books are controlled. No freely available books are listed.

TRENDS

If you want to track a trend 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.

To have consistent figures, you need to be aware what kind of platform the book is published on.

For platforms that deliver books as a single file, compare the Release 4 report **BR1** to the Release 5 metric **Unique_Title_Requests** AND **Data_Type=Book** AND **Section_Type=Book**.

So here is our Release 5 standard view TR_B1, showing **Unique_Title_Requests** for the first three months of 2018. These are on **lines 16, 18, 20** and **22**.

	Title	Metric_Type	Reporting_Period _Total	Jan-2018	Feb-2018	Mar-2018
15	Ophthalmic Medical	Total_Item_Requests	6	2	0	4
16	Ophthalmic Medical	Unique_Title_Requests	3	2	0	1
17	HOPS complex	Total_Item_Requests	1	0	0	1
18	HOPS complex	Unique_Title_Requests	1	0	0	1
19	Misregulation of aut	Total_Item_Requests	5	4	1	0
20	Misregulation of aut	Unique_Title_Requests	4	3	1	0
21	Types of Autophagos	Total_Item_Requests	14	4	4	6
22	Types of Autophagos	Unique_Title_Requests	14	4	4	6

And we can look at the Release 4 report BR1 to check the last three months of 2017:

	A	B	C	F	H	I	J	K
8		Publisher	Platform	ISBN	Reporting Period Total	Oct-2017	Nov-2017	Dec-2017
9	**Total for all titles**				19	11	7	4
10	Ophthalmic Medical Image Analysis	Springer	Platform 1	978-0-300-14424-6	3	3	0	0
11	HOPS complex	Xeres	Platform 1	978-0-300-14424-7	5	2	2	1
12	Misregulation of autophagy	Ind Rev	Platform 1	978-0-300-14424-8	6	5	1	0
13	Types of Autophagosome-lysosome fu	Gander	Platform 1	978-0-300-14424-9	5	1	4	3

The figures we see in **columns I, J** and **K** are the equivalent figures for the same four books. For example, our book on Ophthalmic Image Analysis was used 3 times in October, but wasn't used again until January.

For platforms that deliver books as chapters, you need to compare sections (chapters). Compare the Release 5 metric **Total_Item_Requests** AND **Data_Type=Book** AND **Section_Type=Chapter** to the Release 4 report **BR2**.

So, here is the Release 5 standard view TR_B1, showing the first three months of 2018. The **Total_Item_Requests** are on lines 15, 17, 19 and 21.

	Title	Metric_Type	Reporting_Period_Total	Jan-2018	Feb-2018	Mar-2018
14						
15	Ophthalmic Medic	Total_Item_Requests	18	2	8	8
16	Ophthalmic Medic	Unique_Title_Requests	15	1	7	7
17	HOPS complex	Total_Item_Requests	7	1	1	5
18	HOPS complex	Unique_Title_Requests	6	1	1	4
19	Misregulation of a	Total_Item_Requests	8	1	3	4
20	Misregulation of a	Unique_Title_Requests	7	1	3	3
21	Types of Autphagos	Total_Item_Requests	22	3	11	8
22	Types of Autphagos	Unique_Title_Requests	19	2	10	7

And here is the Release 4 report BR2, showing the figures for the previous three months at the end of 2017.

	A	B	C	F	H	I	J	K
		Publisher	Platform	ISBN	Reporting Period Total	Oct-2017	Nov-2017	Dec-2017
8								
9	Total for all titles				54	4	24	26
10	Ophthalmic Medical Image An	Springer	Platform 2	978-0-300-14424-6	18	2	8	8
11	HOPS complex	Xeres	Platform 2	978-0-300-14424-7	7	0	0	7
12	Misregulation of autophagy	Ind Rev	Platform 2	978-0-300-14424-8	7	0	4	3
13	Types of Autophagosome-lysos	Gander	Platform 2	978-0-300-14424-9	22	2	12	8

So we can see that our book on HOPS complex, for example, wasn't used in October, but was used (7 chapter downloads) in December 2017, with further usage continuing in the first three months of the next year.

NOTE. In a few cases, platforms that provide books as single files actually report the number of sections (chapters). So a book with 11 chapters would be counted as 11, not 1. For such platforms, comparison between the Release 4 and Release 5 is not possible.

Finally, note that some publishers provide their own metrics that enable you to make direct comparisons between Release 4 and Release 5 reports. Where this is the case, the publisher will make it clear.

HOURLY SESSIONS

We have already looked at the meaning of sessions. In most cases, a session is simply the period between when a user logs on and logs off. This is important, because the metrics count interest and usage by session (as we have seen earlier).

However, some platforms handle sessions differently. These platforms divide the day into 24 one-hour slices. In this case, a user who is logged between 12:30 and 14:50 has three separate sessions:

- 12:00 – 12:59
- 13:00 – 13:59
- 14:00 – 14:59

So the Unique_Title counts could be different for this user.

For example, if the user downloads three chapters from the same book during this time, each chapter in a different one-hour session, this counts as 3 **Unique_Title_Requests** (one for each session). In comparison, an identical reader who is **not** on a time-sliced platform only uses a single session, so the count for **Unique_Title_Requests** would only be 1.

AUTOMATIC TIME-OUTS

Automatic time-outs also affect the count. Consider this:

1. A user downloads chapter 1 of a book and spends more than 40 minutes reading it.
2. Meanwhile the platform session times out after 30 minutes of inactivity.
3. The user must now log back in again and start a new session in order to download the next chapter.

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

- The **Unique_Item_Requests** count will be 2 — one for the first chapter (and session) and one for the second chapter (and session).

- The **Unique_Title_Requests** count will also be 2. Although both downloads are from the same book, they have occurred in separate sessions, so we count one for each session.

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 six key book metrics, which all measure things differently. Investigations metrics count all clicks to investigate a book or to download content. Requests metrics only measure clicks that download content. If you want to see all these six metrics for a book, use the standard view TR_B3.

- If you want to work out cost per usage for a book, use standard view TR_B1. This shows two metrics for each book. **Unique_Title_Requests** gives you a consistent way of counting book usage, regardless of which type of platform the book is available on.

- If you want to track trends back across Release 4 reports and Release 5 reports, you can do this. For books on platforms that provide whole books as single files, compare the **Unique_Title_Requests** in standard view TR_B1 with Release 4 report BR1. This enables you to compare book usage by whole book. For books on platforms that provide chapters as separate files, compare the **Total_Item_Requests** in standard view TR_B1 with Release 4 report BR2. This enables you to compare book usage measured by chapter usage. Note that, for legacy reasons, it is not always possible to compare these numbers consistently for some platforms.

- If you want to separate activity on controlled books (those that need paid access) from freely available books, use the Standard View TR_B3.

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.