SUSHI as a Model for Library/Vendor Collaboration

DLF Fall Forum
November 9, 2006

Adam Chandler, Cornell
Tim Jewell, University of Washington
The DLF Electronic Resource Management Initiative, Phase I

Electronic Resource Management:
Report of the DLF Electronic Resource Management Initiative

August 2004

Timothy D. Jewell, Ivy Anderson, Adam Chandler, Sharon E. Farb, Kimberly Parker, Angela Riggio, and Nathan D. M. Robertson
Characteristics of ERMI (Phase 1)

- Practical, comprehensive approach to large, important problem
- Standards-focused
- Highly collaborative
  - 7-member Steering Group
  - Separate librarian and vendor advisory groups
- Well-publicized
- Rapid, extensive uptake (300+ ERM systems sales/installations)
The DLF Electronic Resource Management Initiative, Phase II

- Interoperability and Data Standards
  - (forthcoming white paper)
- License Expression
  - Training in License Term Mapping (ARL/DLF collaboration)
  - License Expression (NISO/EDItEUR License Expression Working Group, etc.)
- E-Resource Usage Statistics
  - Protocol for automated delivery
    - SUSHI: Standardized Usage Statistics Harvesting Initiative, immediate focus on COUNTER-compliant usage reports
  - Statement of functional requirements
Standards Focus: COUNTER

- Formed 2003, member supported (libraries; publishers; aggregators)
- Goal:
  - Allow credible and consistent usage measurement between vendors
- Codes of practice: terminology, report layout and delivery, formats
- Auditing requirement (by June 2007)
COUNTER Usage Reports

- **Journal Report 1:**
  - *Full Text Article Requests by Month and Journal*

- **Journal Report 2:**
  - *Turnaways by Month and Journal*

- **Database Report 1:**
  - *Total Searches and Sessions by Month and Database*

- **Database Report 2:**
  - *Turnaways by Month and Database*

- **Database Report 3:**
  - *Searches and Sessions by Month and Service*
# Journal Report 1:

Number of Successful Full-Text Article Requests by Month and Journal

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<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
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<td>Number of Successful Full-Text Article Requests by Month and Journal</td>
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<td>Mar-2005</td>
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What’s the problem?
ABC-CLIO

- Logon to the Stats interface at: http://serials.abc-clio.com/reports/
- ID: <xxx>@ufl.edu  PW: <nnnn>
- http://serials.abc-clio.com/reports/start&_formname=loginfo&appname=reports&loginname=<xxx>@ufl.edu&amp;password=<nnnn>&forgotten_password=0
- Choose “Select All” for Institutions
- Choose a reporting period (one or multiple months)
- Choose an Output Type (I choose “Excel Friendly HTML”)
- Click “Run Report”
  outputtype=C for CSV, E for Excel friendly html, H for HTML
  start, stop month in YYYYMMDD
- Save Page As HTML file – “FCLAReportMMYY.html”, i.e. – FCLAReport0905.html.
- Upload to FCLA website and transcribe total annual searches into the master spreadsheet.
BePress

- BePress stats are VERY complicated to gather. Go to the admin URL: [http://www.bepress.com/cgi/myaccount.cgi](http://www.bepress.com/cgi/myaccount.cgi)
- Login with the user ID and Password for each school.
- Copy the URL for each school’s report and paste into the browser to get an “Open” or “Save As…” popup window.
- Open the file in Excel, and make the following modifications:
  - Add a line above line one that says: BePress Usage Report (Arial, 14 point)
  - Bold & Italicize & color purple the next line (Full-Text Downloads….)
  - Delete the usage data for each title up to January of the current year (these reports keep data from the creation of any given university’s account), and then move the data for the current year to the left so that the January data is in Column B.
  - Resize Column A so that the full title of each Journal is viewable
  - Merge & Center these two header lines over the width of the report
- Once finished, “Save As Web Page” naming by school & year, i.e. “famu_2005.html”
- Repeat for each school.
- Upload to FCLA website and transcribe total annual searches into the master spreadsheet.
Need to refocus on reports and comparisons we want to make

- Database use by title
- Journal use by title
- Use by package or platform
- Journal use by title, subject comparisons
- Journal use, subscribed vs. unsubscribed
- Cost per use, title by title
- Cost per use, subject by subject
- Cost per use, package to package
- Cost per use trend lines
- Comparisons with peers and consortial partners
SUSHI Objectives

- Solve the problem of harvesting and managing usage data from a growing number of providers.
  - Promote consistency in usage formatting (XML)
  - Automate the “gathering” process
- Enable development of local repositories that can be queried flexibly