

CORAL Usage Statistics User Guide

About CORAL Usage Statistics

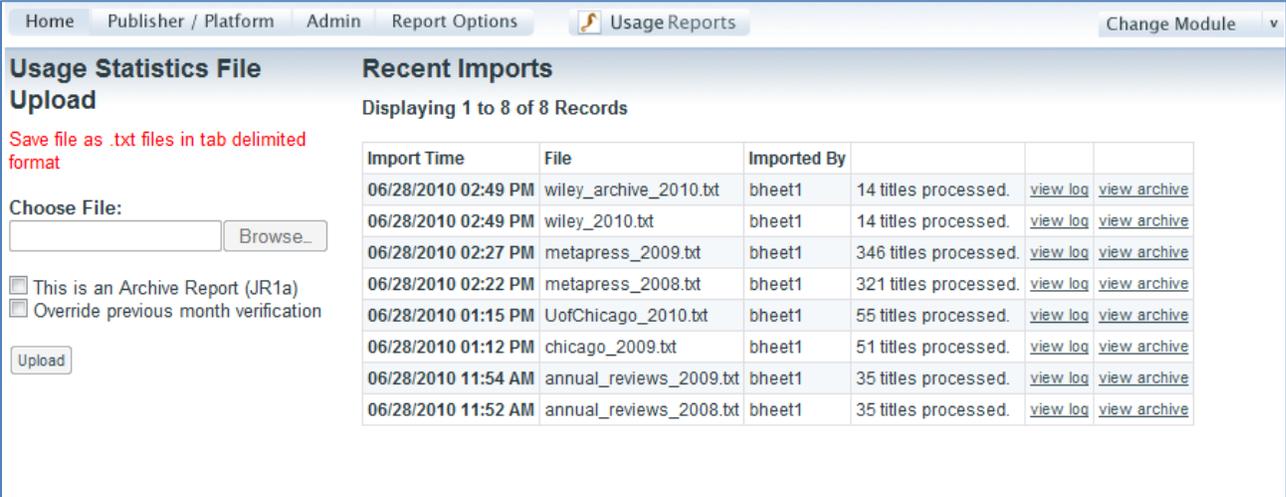
A component of Hesburgh Libraries locally developed ERM, CORAL Usage Statistics provides a solution for storing and managing electronic journal full text download statistic reports. CORAL Usage Statistics currently supports JR1 and JR1A reports (or any report in a JR1 or JR1A format). CORAL Usage Statistics also includes a reporting solution allowing library personnel to retrieve statistics reports. This reporting solution is available as an add-on and must be installed separately. Please see the Usage Reporting Add-On Technical Documentation for more information.

Component Overview

CORAL Usage Statistics has four major components in the primary navigation at the top of each page.

- Home
- Publisher/Platform
- Admin
- Report Options

Home



Import Time	File	Imported By			
06/28/2010 02:49 PM	wiley_archive_2010.txt	bheet1	14 titles processed.	view log	view archive
06/28/2010 02:49 PM	wiley_2010.txt	bheet1	14 titles processed.	view log	view archive
06/28/2010 02:27 PM	metapress_2009.txt	bheet1	346 titles processed.	view log	view archive
06/28/2010 02:22 PM	metapress_2008.txt	bheet1	321 titles processed.	view log	view archive
06/28/2010 01:15 PM	UofChicago_2010.txt	bheet1	55 titles processed.	view log	view archive
06/28/2010 01:12 PM	chicago_2009.txt	bheet1	51 titles processed.	view log	view archive
06/28/2010 11:54 AM	annual_reviews_2009.txt	bheet1	35 titles processed.	view log	view archive
06/28/2010 11:52 AM	annual_reviews_2008.txt	bheet1	35 titles processed.	view log	view archive

New statistics reports are uploaded through the Home page. CORAL Usage Statistics currently supports JR1 and JR1a reports or any report that has been formatted according to JR1 standards. All reports must first be saved as tab delimited text files before being loaded into CORAL. The heading for the month columns should be formatted as MMM-YY.

On the left column of the page are the options for loading the statistics reports. Notice that there are two checkboxes which accompany the Upload feature. Be sure to check the box next to 'This is an Archive Report (JR1a)' for all JR1a archive reports. Failure to check this box will result in CORAL assuming the report is a typical JR1 file.

When processing a new file, CORAL will try and determine whether the statistics being loaded already exist in the system. For example, if January and February 2009 statistics for a specific publisher already exist in the system CORAL will not import those months again on subsequent loads. The 'Override previous month verification' checkbox is available if the user wishes to bypass this check and to re-import all of the data.

One the right column of Home is a list of all imported files sorted by most recent. The list includes a time and date stamp for the upload, the file name, the user who uploaded the file and detail showing the number of titles processed. All uploaded files are saved in their original format on the server and made available in case they are needed in the future. CORAL produces a detailed log file of the upload which includes any errors that may occur. This log file is also made available through the Home page.

When a new file is loaded the data is first displayed on screen before it is committed to the database. This allows the user a chance to scan the data for errors before deciding to either confirm the upload or to cancel.

Usage Statistics File Upload																			
The file APS2010.txt has been uploaded successfully.																			
Please confirm the following data:																			
	Publisher	Platform	Print ISSN	Online ISSN	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10	Aug-10	Sep-10	Oct-10	Nov-10	Dec-10	YTD Total	YTD HTML	YTD PDF
Physical Review A	APS	APS	1050-2947	1094-1622	42	60	44	29	66	53	58	47	72	47	324	30	872	0	872
Physical Review B	APS	APS	1098-0121	1550-235X	436	460	411	328	304	379	347	313	483	515	511	276	4763	0	4763
Physical Review C	APS	APS	0556-2813	1089-490X	209	247	198	213	235	231	176	114	194	106	105	94	2122	0	2122
Physical Review D	APS	APS	1550-7998	1550-2368	26	44	62	41	46	17	44	59	77	44	96	38	594	0	594
Physical Review E	APS	APS	1539-3755	1550-2376	76	90	75	90	68	77	70	85	108	82	96	53	970	0	970
Physical Review Letters	APS	APS	0031-9007	1079-7114	422	380	438	523	411	413	407	364	499	486	678	231	5252	0	5252
Physical Review Online Archive (PROLA)	APS	APS			118	99	121	116	124	89	112	145	175	127	177	93	1496	0	1496
Reviews of Modern Physics	APS	APS	0034-6861	1539-0756	61	38	27	28	35	123	67	58	60	96	42	34	669	0	669

Publisher / Platform

The screenshot shows the 'Publisher / Platform Update' page. At the top, there is a navigation bar with tabs for 'Home', 'Publisher / Platform', 'Admin', 'Report Options', and 'Usage Reports'. A 'Change Module' dropdown is on the right. The main content area lists several publishers and platforms, each with a 'view / edit' link and a 'show publisher list' link. The 'MetaPress' entry is expanded to show a list of publishers: 'Springer', 'Academy of Management', 'Akademiai Kiado', 'Versita Sp. z o.o.', 'Agricultural History Society', 'American Society for Clinical Pathologists', and 'IOS Press'.

When a new file is loaded an entry for each Platform and Publisher combination listed in the file is created. It is through the Publisher / Platform page that the information about each Platform and Publisher is accessed. This includes the statistics data as well as the administrator login required to download new reports from the publishers' website. As shown in the picture above, this information can be accessed at both the Publisher and Platform level. Platforms are listed first and the corresponding publishers are collapsed. The MetaPress example above has been expanded to show the corresponding publishers. The 'view/edit' link brings the user to the following detailed information page for the publisher or platform selected.

The screenshot shows the 'MetaPress' platform record page. The navigation bar is the same as in the previous screenshot. The main content area has a sidebar with tabs for 'Logins', 'Notes', 'Statistics', and 'Titles'. The 'Logins' tab is active, showing 'Interface Logins' with '(none found)' and an 'add new login' link. Below this is the 'Organization Accounts' section, which includes a link to 'view organization' and a table with the following data:

Login Type	Username	Password	URL	Notes
Admin	uni.admin	0e54s21w	http://admin.metapress.com	

Below the table is a link to 'change associated organization'.

Seen here is the platform record for MetaPress. The information is separated among four tabs; Logins, Notes, Statistics and Titles. The Logins tab contains the administrator username/password login

required to download new statistics reports. This information can be added in two ways. First, the login can be added to the record using the 'add new login' link. This opens a new pop-up edit window where the login type, username, password, url and any pertinent notes are entered. Alternatively, if the login already exists in the Organizations module a link to the Organization record can be added. This will then display any matching logins from the Organizations module here in CORAL Usage.

In the above picture, a link to the MetaPress record in CORAL Organizations has been entered. The 'view organization' link will bring the user directly to the MetaPress record within CORAL Organizations. Any account logins that exist on the organization record will be displayed here within CORAL Usage Statistics. This allows for a single point of entry for all account logins within CORAL Organizations. Logins can however still be entered directly within CORAL Usage Statistics if preferred.

The screenshot shows the 'Usage Reports' section of the CORAL system. The 'MetaPress' record is selected, and the 'Notes' tab is active. The 'Interface Notes' table displays the following data:

Start Year	End Year	Counter Compliant?	Interface Notes	
2008	Present	Y		edit remove

Below the table is a link: [add new interface note](#)

The Notes tab allows the user to identify the years for which statistics are available as well as identifying which years are COUNTER compliant reports and which years are not. Also available is the Interface Notes field. This field is displayed to library personnel within the Usage Reporting Add-On page explained later in this document. It is meant for public notes that give added context to the statistics.

The screenshot shows the 'Usage Reports' section of the CORAL system. The 'MetaPress' record is selected, and the 'Titles' tab is active. The 'Associated Titles and ISSNs' table displays the following data:

Title	Print ISSN	Online ISSN	
4OR: A Quarterly Journal of Operations Research	1619-4500	1614-2411	view related titles view in link resolver
AAPS PharmSciTech		1530-9932	view related titles view in link resolver
Abdominal Imaging	0942-8925	1432-0509	view related titles view in link resolver
Abhandlungen aus dem Mathematischen Seminar der	0025-5858	1865-8784	view related titles

The Titles tab displays all of the titles that were included in the uploaded reports for each Platform and Publisher. A quick scan of this page after loading a new report will allow the user to check for any data problems such as duplicate titles or missing ISSN information. The Titles tab offers two links for each title entry. 'View related titles' will open a window showing related titles with the same ISSN. Currently this is primarily for identifying when an online ISSN from one title matches the print ISSN from

another. The 'view related titles' link functionality will be changed in a later version of CORAL Usage so it is perhaps best to ignore the link at this time. 'View in link resolver' offers a way to quickly open the link resolver menu for each title in order to see the full list of holdings. The link resolver base url is set in a configuration file. See the Usage Reporting Add-On Technical Documentation for instructions.

The screenshot shows the 'MetaPress' interface with a navigation bar at the top containing 'Home', 'Publisher / Platform', 'Admin', 'Report Options', 'Usage Reports', and 'Change Module'. On the left is a sidebar with links for 'Logins', 'Notes', 'Statistics', and 'Titles'. The main content area is titled 'Update Statistics' and contains a table with the following data:

2010		view spreadsheet
Jan 2010	delete entire month	view outliers for this month
Feb 2010	delete entire month	view outliers for this month
Mar 2010	delete entire month	view outliers for this month
Apr 2010	delete entire month	view outliers for this month
May 2010	delete entire month	
Jun 2010	delete entire month	view outliers for this month
Jul 2010	delete entire month	view outliers for this month
Aug 2010	delete entire month	
Sep 2010	delete entire month	
Oct 2010	delete entire month	
Nov 2010	delete entire month	view outliers for this month
Dec 2010	delete entire month	
YTD 2010	update overrides for this year	
2009		view spreadsheet
Jan 2009	delete entire month	view outliers for this month

The Statistics tab shows all the statistics which have been loaded for the specific Platform or Publisher sorted with most recent year first. The data for each year can quickly be opened for viewing in Excel using the 'view spreadsheet' link. It is also possible to delete the data for individual months.

CORAL Usage Statistics also offers the ability to view and edit outlier use. When new statistics are loaded into the system, CORAL processes the data title by title and month by month. For each title, the system compares each new month's data against the previous twelve months' average. The system will tag the month as an 'outlier' if the new month's data is significantly higher than the expected range of use. Consider for example a journal which averages ten downloads per month but then in a new report one of the months shows two thousand downloads. Two thousand is significantly higher than expected and CORAL will flag this month as an outlier. This is an extreme example but in the case of individuals creating personal article archives is not entirely uncommon.

Through the 'view outliers for this month' link the user has the ability to either ignore the outlier, marking it as acceptable, or to override the outlier with a number that makes more sense and excludes the problematic use spike. CORAL Usage Statistics allows for three levels of outliers. The three levels or formulas for the outlier check are edited on the Admin page discussed next and are also color coded yellow, orange and red with red being the worst and most extreme outliers.

Admin

The screenshot shows the 'Admin' interface for 'Usage Reports'. It features a navigation bar with 'Home', 'Publisher / Platform', 'Admin', 'Report Options', and 'Usage Reports'. The main content is divided into three sections:

- Users:** A table with columns for Login ID, First Name, Last Name, and Privilege. Two users are listed: 'bheet1' (Ben Heet) and 'rmalott' (Robin Malott), both with 'admin' privileges. Each row has 'update' and 'remove' links.
- Email addresses for logs:** A section with an 'add new email address' link. Below, under 'Current Email Addresses', one address 'rmalott@nd.edu' is listed with 'edit' and 'delete' links.
- Outlier Parameters:** A section with 'Current Outlier Parameters' and three levels: Level 1 (50 over plus 200% over - displayed yellow), Level 2 (100 over plus 300% over - displayed orange), and Level 3 (200 over plus 400% over - displayed red). Each level has an 'edit' link.

There are three sections on the CORAL Usage Statistics Admin page; Users, Email Addresses and Outlier Parameters. When adding new users to the system there are only two privilege levels available; admin and add/edit. There is no view only option available. The Usage Reporting Add-On offers a reporting page which will be the primary way library personnel acquire and download statistics reports. The statistics module is then meant as the back-end system through which the statistics are managed and as such needs to be accessed only by staff responsible for loading and managing the reports.

The 'Email addresses for logs' section identifies which addresses will receive an email with a link to the log file created for each new uploaded report.

The Outlier Parameters section is where the user will edit the outlier formula used to identify use spikes. There are three levels. The Level 1 example in the above picture will flag an outlier if a specific month's use is at least fifty more than two hundred percent above the previous twelve month average. The formula includes more than a simple percentage over the previous twelve month average in order to avoid low use titles being flagged with outliers. The following is an example scenario.

A journal consistently receives two article downloads per month but then the next month has thirty downloads. There is a significant percentage increase from two to thirty and as such this would be flagged as an outlier but with only thirty downloads the total use is still not very significant. The addition of the '50 over' the percent increase will cause the system to ignore any use lower than fifty downloads regardless of the percentage increase from the previous twelve month average.

Report Options

The screenshot shows a web interface for 'Publisher / Platform Reporting Administrative Update'. At the top, there are navigation tabs: 'Home', 'Publisher / Platform', 'Admin', 'Report Options', and 'Usage Reports'. A 'Change Module' dropdown menu is visible in the top right corner. Below the navigation, the page title is 'Publisher / Platform Reporting Administrative Update'. The main content area contains the following text: 'Directions: Mark the checkboxes to add / remove specific Platforms or Publishers to the default report list. Click 'edit report display name' to change the display name in the reporting system for specific Platforms or Publishers.' Below this, there is a section titled 'Available As Default Report' with a list of four items, each with a checked checkbox, a name in parentheses, an 'edit report display name' link, and a 'show publisher list' link:

- Annual Reviews (*Annual Reviews*) [edit report display name](#)
▶ [show publisher list](#)
- Wiley Interscience (*Wiley Interscience*) [edit report display name](#)
▶ [show publisher list](#)
- Chicago Journals (*University of Chicago Press*) [edit report display name](#)
▶ [show publisher list](#)
- MetaPress (*MetaPress*) [edit report display name](#)
▶ [show publisher list](#)

If the Usage Reporting Add-on is installed, the Report Options page will appear. This page allows editing of the values that display in the Provider / Publisher report parameters in the Usage Reporting Add-On. The Publisher and Platform names used by CORAL Usage Statistics come directly from the Publisher and Platform columns in the uploaded statistics reports. Unfortunately the names included in those reports are not always the names most familiar to users. The Report Options page allows for a local display name to be added for each Platform and Publisher using the 'edit report display name' link. 'CJO' for example is the Platform name used on the Cambridge Journals COUNTER report. It makes sense in that case to add a display name for 'Cambridge Journals Online' or something similar so that the value could be recognized in the Provider / Publisher dropdown in the Usage Reporting Add-On.

CORAL Usage Statistics also offers the ability to control which Platforms and Publishers display in the dropdown menu in Usage Reporting. MetaPress for example is a Platform which contains many publishers, some of which library personnel may not use or need to query. The Report Options page offers the ability to select the 'Available as Default Report' checkbox for each Platform and Publisher which should appear within the dropdown menus in the Usage Reporting Add-On. Adding every Platform and Publisher to the dropdown menu may result in a dropdown which is too long to be used. The checkbox allows for only the relevant Platform and Publisher names to be included.

Usage Reporting Add-On



CORAL Usage Reports

Select Report: Usage Statistics by Provider / Publisher

Provider / Publisher: MetaPress

Year: 2009

Do not adjust numbers for use violations

Submit Reset

[Contact / Help](#)

The Usage Reporting Add-On offers a clean and easy to navigate reporting page which library personnel can use to access and download the statistics reports. Please see the Usage Reporting Add-On Technical Documentation for installation instructions.

There are five different reports available.

- Provider Rollup: Total full text downloads per year for each Provider
- Publisher Rollup: Total full text downloads per year for each Publisher
- Top Journal Requests: Most used journals
- Yearly Usage Statistics: Summary YTD totals listed by title for all years
- Statistics by Provider / Publisher: The standard JR1 article downloads reports
- Statistics by Title: Search by individual journal title or ISSN

In addition to the available reports is the option to check the box labeled 'Do not adjust numbers for use violations'. This checkbox pertains to the outlier use mentioned earlier in this document. When a use outlier is identified CORAL offers the option to manually enter in an override number as a replacement for the questionable outlier use. The 'do not adjust numbers for use violations' checkbox enables the user to see either the original data as imported or the manually entered override number.

To control which Providers/Publishers appear in the drop downs, refer to the 'Report Options' section, above.

The selected report is displayed on-screen as in the following picture with the option to then export to Excel.



CORAL Usage Reports

Usage Statistics by Provider / Publisher

Provider / Publisher: MetaPress

Year: '2009'

[Modify Parameters](#) [Create New Report](#)



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

Title ▼ ▲	Publisher ▼ ▲	Platform ▼ ▲	Year ▼ ▲	Print Issn ▼ ▲	Online Issn ▼ ▲	Jan ▼ ▲	Feb ▼ ▲	Mar ▼ ▲	Apr ▼ ▲	May ▼ ▲	Jun ▼ ▲	Jul ▼ ▲	Aug ▼ ▲	Sep ▼ ▲	Oct ▼ ▲	Nov ▼ ▲	Dec ▼ ▲	Ytd Total ▼ ▲	Ytd Html ▼ ▲	Ytd Pdf ▼ ▲	Outlier Flag ▼ ▲
4OR: A Quarterly Journal of Operations Research view related titles view in sfx	Springer	MetaPress	2009	1619-4500	1614-2411	7	13	7	15	3	12	13	4	8	16	8	3	109	8	101	N
AAPS PharmSciTech view related titles view in sfx	Springer	MetaPress	2009		1530-9932	0	0	0	0	0	1	0	0	0	0	0	0	1	0	1	N
Abdominal Imaging view related titles view in sfx	Springer	MetaPress	2009	0942-8925	1432-0509	1	0	1	1	0	1	0	2	1	0	0	2	9	0	9	N

The query parameters are displayed in the top right of the page along with a link to modify the parameters and icons for both printing and exporting the report. The report in this example was for all 2009 data from the MetaPress platform. Please note the 'view related titles' link that appears below each title in the list. This link opens a new window and will display all of the available statistics in the system for the specific title regardless of publisher or platform.