

PRESENTING COUNTER DATA TO ASSESS BIG DEALS

at the University
of Liverpool

Case Study

COUNTER

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BACKGROUND

Jeff Woods, Usage Analyst in Libraries, Museums and Galleries at the University of Liverpool, has developed an in-house system for displaying data and analytics relating to its big deals.

UNDERSTANDING BIG DEALS

The University of Liverpool subscribes to a range of big deals, including American Chemical Society (NESLi 2), CUP Full Collection (Jisc), Emerald Premier, OUP Journals, SAGE Premier, ScienceDirect Freedom, Springer Compact, T&F Medicine, T&F Social Sciences & Humanities, and Wiley Full.

To assist in the management and assessment of their value, an in-house system of dashboards for displaying data and analytics, relating to journal big deals, has been developed. The dashboard system enables the Subscriptions Manager to see key metrics and visual indicators relating to particular big deals.

The dashboard information is used to support annual subscription reviews as well as providing

data on an ad hoc basis, which can involve looking at cost per use and average usage. In addition, the data is used to benchmark against other big deal packages, as well as against data for the previous year.

Understanding packages and collections

Dashboards are also available that allow data about individual packages to be displayed and compared. These provide different views on the data than the big deal dashboards, including (for example) subject categorisations that are applied at the data manipulation stage. These dashboards are primarily used by Liaison Librarians.

THE PROCESS

Data is obtained from the ERM (EBSCO Admin's Holdings Management (HM) and JUSP (or native site) for usage. COUNTER "TR_J3" and "TR_B3" data is collected and imported into Excel. At this point, the data undergoes a checking and normalising process. This can include:

- Cross populating ISSNs if there are any blanks in the usage reports and HM title listings
- Applying IFERROR prefix to LOOKUP, enables lookup to cross reference against print & online ISSNs in single formula
- Where required, stripping out archive usage (for archives paid for separately). This involves using 'usage by YOP (Year of Publication)' and front file coverage dates (the latter is sourced from HM). Also, where appropriate, the R5 "Title Master Report" (TR) is used to determine the extent of GOA (Gold Open Access) use ("TR J4" only provides Controlled usage)
- For e-books data hyphens are stripped out of ISBNs using a combination of Excel and notepad to re-format as "text" (using Excel's text import wizard)

Once in Excel, a series of pivot tables are created, and "extremely powerful" slicer functionality is applied to manipulate the data and to create a series of dashboard features.

Two master versions of the data are created and static copies of each are created. One table covers Controlled UIR ("Unique_Item_Requests") and the other covers GOA UIR ("Unique_Item_Requests"). Both capture usage against individual print and online ISSNs. Lookups are applied to each of the tables to further manipulate the data, and cost data is added.

PRESENTATION OF BIG DEAL DATA

Using a series of pivot tables, dashboards are produced using Excel. These sophisticated dashboards provide an "at a glance" view on big deal data, as well as enabling comparisons across big deals. The data presented includes:

- Usage by deal
- Total cost vs total use
- Cost per use
- Breadth of use (titles available vs titles used including % of titles used)
- Controlled vs GOA usage
- Average use (using R5 "Unique_Item_Requests" from 2020) per title (controlled)
- Cost
- Average cost per title
- Cost per use
- Total use (R5 UIR from 2020)

Package/collection dashboard presentation

The package/collection dashboard allows analysis by subject area as well as content type and cost banding. Data is presented on:

- Usage by package/collection
- Number of titles
- Cost
- Cost per title
- Use per title
- Cost per use

Several “derived statistics” and historical comparisons are also provided:

- Cost per use vs cost of inter library loan
- Cost per use against the three-year average cost per use
- % change in cost
- % change in use
- Cost per use for the previous three years for comparative purposes

For the derived statistics, the dashboard provides some visual indicators for various metrics, including ticks, crosses and exclamation marks. These provide simple visual aids to help interpret the data and identify possible areas for further investigation.

PRE-SET VIEWS AND BESPOKE FUNCTIONALITY

Whilst the dashboard is based on a wealth of underlying data, it has been planned in a way that provides some easy-to-use, pre-set views on the data. However, there is flexibility for users to interpret the data in other ways to tailor queries and presentations to their needs. This includes the ability to “unhide” particular columns of additional data.

USE AND SUPPORT

In order to support liaison librarians and other users of the dashboard, the Usage Analyst and the Subscriptions Manager run a live briefing session that includes a working demonstration of the dashboards. This involves introducing the various metrics, explaining how to use the slicers and other functionality, and providing scenarios where these may be valuably applied. These sessions

also provide attendees with an opportunity to ask questions and provide feedback. Following these sessions, the dashboards are sent out with a briefing sheet outlining key features and support is provided as required.

COUNTER 5

COUNTER R5 data has been used since 2020. Some advantages to R5 data have been identified, including having Controlled and GOA usage data in one report (“TR_J3”), which avoids having to collect the two separately. This is particularly important in the presentation of big deal data where comparisons between Controlled and OA usage are vital. In some cases where a resource has been paid for separately (i.e. is not part of a package subscription), using the “Title Master Report” instead provides a way to strip out any archive/backfile usage.

LESSONS LEARNED AND OBSERVATIONS

- The creation of the dashboards requires a good working knowledge of Excel
- Features in Excel such as slicers are “really powerful” and can be used to make the most of the data collected
- Excel has limits on formatting, so it is important to “get creative with Excel”
- Having the flexibility to provide some pre-set dashboard views as well as tailoring allows detailed interrogation of the data if required, without being overwhelming for regular use

ADDITIONAL RESOURCES

COUNTER and JUSP provide a range of resources to help with understanding and using usage data.

COUNTER Foundation Class 10 provides a tutorial on working with COUNTER 5 reports in Microsoft Excel: [COUNTER Foundation Class 10: Working with COUNTER 5 reports in Microsoft Excel](#)

JUSP has produced a short video on using pivot tables in Microsoft Excel. It is aimed at anyone new to using pivot tables: [How can I use Excel pivot tables with R5 reports? - Zoom](#)

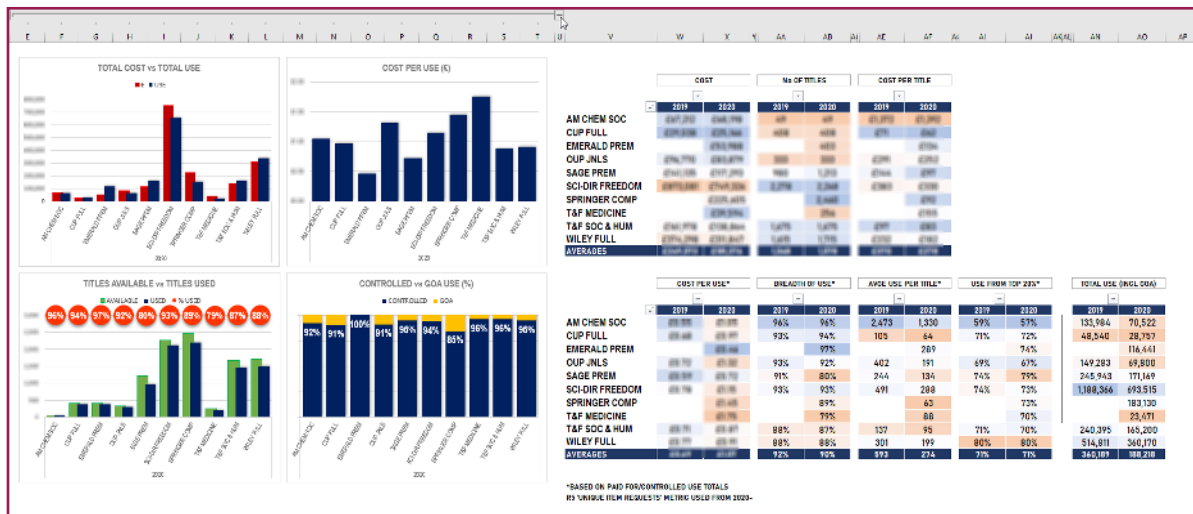


Figure 1. Full Big Deals Dashboard



Figure 2. Big Deals Dashboard Slicers Showing and Used to Limit To 2019 Statistics)

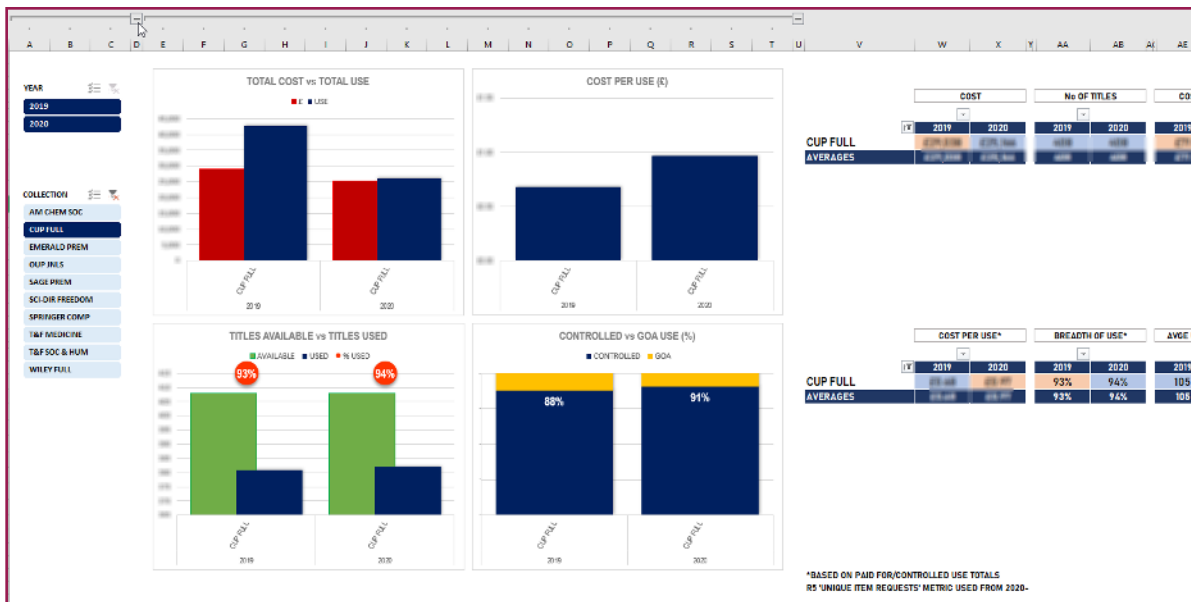


Figure 3. Big Deals Dashboard Slicers Showing and Used to Limit to Cambridge University Press (CUP) Full Collection 2019 vs 2020 Statistics.

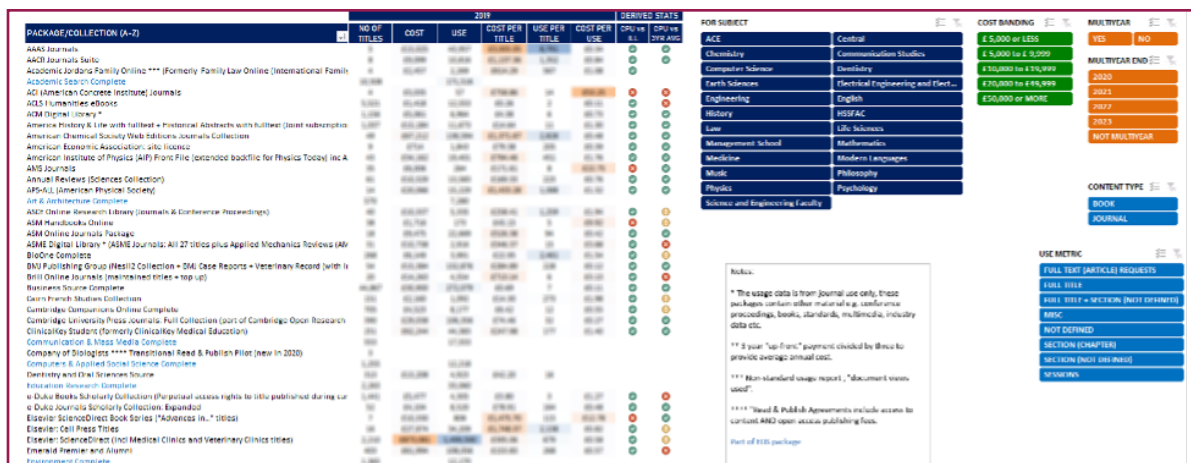


Figure 4. Full Package / Collection Dashboard

		HISTORIC			DERIVED STATS			
LINE TITLE	COST PER USE	CPU (2018)	CPU (2017)	CPU (2016)	CPU vs ILL	CPU vs 3YR AVG	COST % CHANGE	USE % CHANGE
1000	100.00	100.00	100.00	100.00	✓	✓	0%	0%
1001	100.00	100.00	100.00	100.00	✓	✓	0%	0%
1002	100.00	100.00	100.00	100.00	✓	✓	0%	0%
1003	100.00	100.00	100.00	100.00	✓	✓	0%	0%
1004	100.00	100.00	100.00	100.00	✗	✗	0%	0%
1005	100.00	100.00	100.00	100.00	✓	✗	0%	0%
1006	100.00	100.00	100.00	100.00	✓	✓	0%	0%
1007	100.00	100.00	100.00	100.00	✓	✓	0%	0%
1008	100.00	100.00	100.00	100.00	✓	✓	0%	0%
1009	100.00	100.00	100.00	100.00	✓	✓	0%	0%
1010	100.00	100.00	100.00	100.00	✓	✓	0%	0%
1011	100.00	100.00	100.00	100.00	✓	✓	0%	0%
1012	100.00	100.00	100.00	100.00	✓	✓	0%	0%
1013	100.00	100.00	100.00	100.00	✓	✓	0%	0%
1014	100.00	100.00	100.00	100.00	✗	!	0%	0%
1015	100.00	100.00	100.00	100.00	✗	!	0%	0%
1016	100.00	100.00	100.00	100.00	✓	!	0%	0%
1017	100.00	100.00	100.00	100.00	✓	✗	0%	0%

Figure 5. Package / Collection Dashboard Showing Optional Historic Cost Per Use and % Change Statistics.

This case study was written and produced by Pete Dalton at Evidence Base, Birmingham City University working on behalf of JUSP at Jisc.

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