SUSHI as a Model for Library/Vendor Collaboration

DLF Fall Forum
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The DLF Electronic Resource Management Initiative, Phase I

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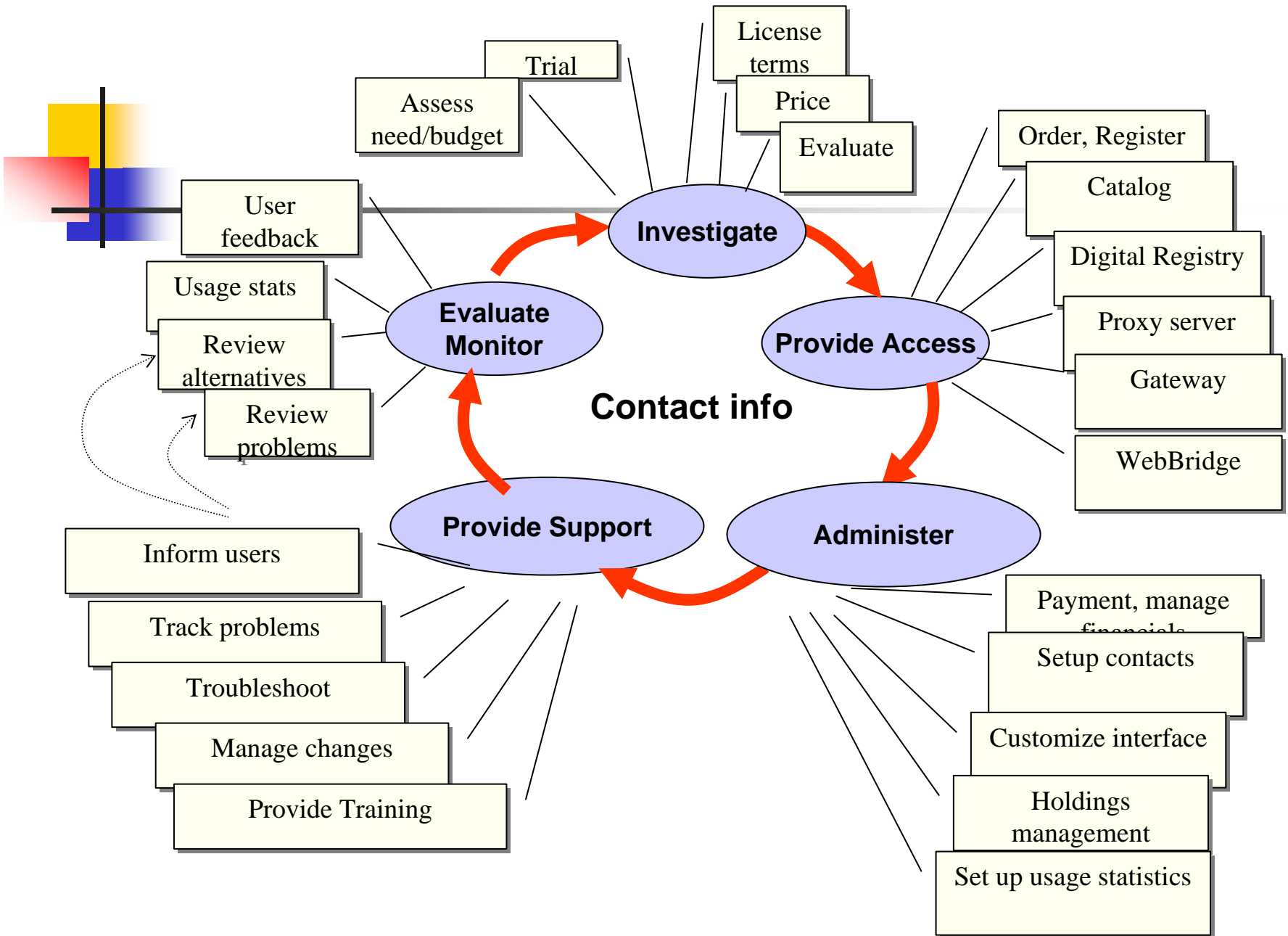Report of the DLF Electronic Resource Management Initiative

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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)

Contact info

Investigate
- Trial
- Assess need/budget
- License terms
- Price
- Evaluate

Provide Access
- Order, Register
- Catalog
- Digital Registry
- Proxy server
- Gateway
- WebBridge

Administer
- Payment, manage financials
- Setup contacts
- Customize interface
- Holdings management
- Set up usage statistics

Provide Support
- Inform users
- Track problems
- Troubleshoot
- Manage changes
- Provide Training

Evaluate Monitor
- User feedback
- Usage stats
- Review alternatives
- Review problems

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

	A	B	C	D	E	F	G	H	I	J	K
1	Journal Report 1 (R2)	Number of Successful Full-Text Article Requests by Month and Journal									
2	Sample University										
3	Date run:										
4	2005-04-05										
5		Publisher	Platform	Print ISSN	Online ISSN	Jan-2005	Feb-2005	Mar-2005	YTD Total	YTD HTML	YTD PDF
6	Total for all journals		EBSCOhost			3942	10006	11093	25041	15776	9265
7	Harvard Business Review	Harvard Business	EBSCOhost	0017-8012		1117	707	702	2526	1591	935
8	Scientific American	Scientific America	EBSCOhost	0036-8733		92	230	221	543	342	201
9	Reading Teacher	International Readi	EBSCOhost	0034-0561		11	190	179	380	239	141
10	Economist	Economist Newspa	EBSCOhost	0013-0613		33	95	155	283	178	105
11	Child Development	Blackwell Publishi	EBSCOhost	0009-3920		32	68	103	203	128	75
12	American Journal of Public Hea	American Public H	EBSCOhost	0090-0036		59	48	80	187	118	69
13	Journal of Marriage & Family	Blackwell Publishi	EBSCOhost	0022-2445		32	68	195	295	186	109
14	Explicator	Heldref Publication	EBSCOhost	0014-4940		12	196	188	396	249	147
15	Sports Marketing Quarterly		EBSCOhost	1061-6934		10	121	32	163	103	60
16	Journal of Learning Disabilities	PRO-ED	EBSCOhost	0022-2194		24	122	142	288	181	107

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&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"
- http://serials.abc-clio.com/reports/go/ABC-Clio-Serials-Reports&_appname=reports&_operation=DoReport&addlcid=I00271&addlcid=I00267&addlcid=I00268&addlcid=I00269&addlcid=I00270&addlcid=I00637&addlcid=I00725&addlcid=I00652&addlcid=I00697&addlcid=I00764&startmonth=20051001&stopmonth=20051101&outputtype=C
  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
- 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