



Creating tailored reports using TR: Filter Title Master Report

Step-by-step guide



This guide takes you step-by-step through how to create your own reports using the **TR: Filter Title Master Report**. It explains the various options available and gives tips to help you make your selection.

Contents

How the title master reports relate to the standard views.....	2
TR: Filter Tile Master Report.....	2
Step 1: Filters	3
Data type	3
Section type	3
Access type.....	4
Access method.....	4
YOP (Year of Publication)	4
Metric Type	4
Custom	5
Step 2: Columns to include	5
Core and DOAJ information	5
Showing breakdowns or totals.....	5
Other information	6
Step 3: Select a service (platform)	7
Step 4: Select a reporting period.....	7
What you will see	7
Refining or changing your report	8
Troubleshooting.....	8
Standard view filter pre-sets.....	8
Journal standard views	8
Book standard views	9

How the title master reports relate to the standard views

The title standard views are derived from the same title master report, but the filters have been pre-set for you using a standard setting specified by COUNTER. Standard views enable you to quickly and easily access reports in a format that is comparable across services.

There may be situations where you want to tailor reports to your own specifications and this is where the master report filter tool comes in. This flexibility is one of the main advantages of Release 5 over Release 4.

The title standard views are a good place to start if you are thinking about creating your own view. The tables at the end of this guide show the selections you would make to replicate the standard views. By looking at the standard views and thinking about what you would like to change you can use the standard views as a template.

TR: Filter Title Master Report

If you want to apply your own filters to the title master report, select **TR: Filter Title Master Report** from the report menu in the R5 area of JUSP.

You will then see a form with the options.

There are 4 steps to specifying your own report/view:

1. Select what data you would like to be included in the report
2. Select which columns you would like to appear in the report output
3. Select the service (platform)
4. Select the usage date range (reporting period)

The screenshot shows a web form for configuring a report. At the top, a dropdown menu is set to "TR: Filter Title Master Report". Below this, the "Filters:" section contains several rows of checkboxes: "Data_Type" (Book, Journal, Newspaper or Newsletter, Other, Report, Thesis or Dissertation), "Section_Type" (Article, Book, Chapter, Other, Section), "Access_Type" (Controlled, OA_Gold), "Access_Method" (Regular, TDM), "YOP" (From: 0001, To: 9999), "Metric_Type" (Limit Exceeded, No_License, Total_Item_Investigations, Total_Item_Requests, Unique_Item_Investigations, Unique_Item_Requests, Unique_Title_Investigations, Unique_Title_Requests), and "Custom:" (Core). A "Clear Filters" button is on the right. The "Columns to include:" section has checkboxes for Core, DOAJ, Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, ISBN, Print_ISSN, Online_ISSN, URI, Data_Type, Section_Type, YOP, Access_Type, and Access_Method, with a "Clear Columns" button. The "Institution:" dropdown is set to "A Dummy Institution". The "Service (Platform):" dropdown is set to "American Physical Society (APS)". At the bottom, the "From:" field is set to "Jan 2019" and the "To:" field is set to "Jan 2019". The "Results/page:" dropdown is set to "50". A "Get Report" button is on the right.

Step 1: Filters

This is where you select what data you would like to be included in the report.

Filters:

* **Data_Type:** Book Journal Newspaper or Newsletter Other Report Thesis or Dissertation

* **Section_Type:** Article Book Chapter Other Section

* **Access_Type:** Controlled OA_Gold

* **Access_Method:** Regular TDM

YOP: From: To:

* **Metric_Type:** Limit_Exceeded No_License Total_Item_Investigations Total_Item_Requests Unique_Item_Investigations Unique_Item_Requests
 Unique_Title_Investigations Unique_Title_Requests

Custom: Core

[Clear Filters](#)

You can select multiple options for each filter. All filters marked by an asterisk must have at least one option selected.

TIP: Click on the filter name (e.g. 'Data_Type') to select all or none of the options.

TIP: Hover over the (i) for more information.

Here is a brief overview of the 7 filter options available.

Data type

* **Data_Type:** Book Journal Newspaper or Newsletter Other Report Thesis or Dissertation

This filter lets you choose what type of content you want to look at i.e. journals or books.

Section type

* **Section_Type:** Article Book Chapter Other Section

Applicable Section_Types depend on the Data_Types as well as the type of supplier or service you want to request data for.

TIP: If you are unsure, you can select all section types and then all applicable ones will be included in the report. You can then refine your selection if necessary.

Section_Type	Description
Article	An article from a compilation, such as a journal, encyclopedia, or reference book.
Book	A complete book, accessed as a single file.
Chapter	A chapter from a book.
Other	Content delivered in sections not otherwise represented on the list.
Section	A group of chapters or articles.

Source: <https://www.projectcounter.org/code-of-practice-five-sections/3-0-technical-specifications/>

Access type

* Access_Type: ⓘ Controlled OA_Gold

Controlled covers any content item that was not open at the time it was accessed (anything that was not gold open access). **OA_gold** relates to any content item that was immediately and permanently available as open access because an APC (article processing charge) has been paid. This applies to the item itself, not the publication, so it may be in hybrid publication or fully open access publication.

Access method

* Access_Method: ⓘ Regular TDM

Regular indicates that usage was generated by a human user, rather than by text and data mining processes (**TDM**). All standard views are limited to Regular and exclude TDM.

YOP (Year of Publication)

YOP: ⓘ From: 0001 To: 9999

The default is set to include all years. To view usage for a different publication range, enter the years here. Note that 0001 indicates unknown and 9999 in press. So, for example, if you were interested in content published recently, you may want to enter 2019-9999 rather than just 2019-2019.

Metric Type

* Metric_Type: Limit_Exceeded No_License Total_Item_Investigations Total_Item_Requests Unique_Item_Investigations
 Unique_Item_Requests Unique_Title_Investigations Unique_Title_Requests

Metrics are a way of describing what user action is being counted. These are the figures you will see in the reports. You can select one or multiple metric types. When selecting multiple metrics types, the resulting report will have a line for each metric type and title. Counts for different metric types cannot be added together.

8 of the 12 COUNTER metrics are found in the TR Title Master Report.

- For journals, the main usage metrics are **Total_Item_Requests** and **Unique_Item_Requests**.
- For books, the main usage metrics are **Total_Item_Requests** and **Unique_Title_Requests**.
- Note that **Unique_Title_Requests** only applies to books not journals.
- **No_License** is used to count the number of times users have tried to access content you don't have a license for (i.e. subscription or purchase) and so have been denied access.
- **Limit_Exceeded** means that the user is denied access to a content item because the simultaneous user limit would be exceeded.
- **Total_Item_Investigations**, **Unique_Item_Investigations** and **Unique_Title_Investigations** relate to a user accessing information related to a content item (i.e. an abstract or detailed descriptive metadata of an article) or a content item itself (i.e. full text of an article).

Not all metric types will be applicable to all content/data types and suppliers. If there are no counts for a selected metric type, it will not appear in the resulting report.

Custom

Custom: ⓘ Core

This is a JUSP feature that uses information not supplied in the source reports. JUSP can mark-up journal titles that have been set as Core in Knowledge Base Plus (KB+). Checking **Core** here will filter the report to **only** show titles marked as Core.

If you have no core titles marked up in KB+, the report will return as empty.

To include all titles, leave unchecked. If you want to see all title but with core titles flagged, leave unchecked and then choose this option in 'Columns to include' (see Step 2)

Step 2: Columns to include

This is where you can choose what level of detail you want to be displayed in the report.

Columns to include:

Core DOAJ Publisher Publisher_ID Platform DOI Proprietary_ID ISBN Print_ISSN Online_ISSN
 URI Data_Type Section_Type YOP Access_Type Access_Method

Clear Columns

Some columns cannot be excluded from the report and so are not shown as an option. These are:

- Title
- Metric Type
- Reporting total and the monthly totals

Core and DOAJ information

Core and **DOAJ** (Directory of Open Access Journals) information for journal titles is not included the COUNTER reports, and this is extra information added by JUSP. When selected, the report will include a column for each and flagging when these apply to a title.

Showing breakdowns or totals

Selecting any of the following will add columns and show a breakdown for each attribute included rather than a total.

- Section_Type*
- YOP (year of publication)
- Access_Type
- Access_Method

* Note that is unlikely you will see much difference with Section_Type as it is rare for a title to have multiple section types.

When not selected, the report will still include all the information you selected in the filter (step 1), but if you have selected multiple options, these figures will be added together unless you request a breakdown here. For example, if YOP is selected, then you will see a breakdown by year of publication. Otherwise, the figures will be totalled over the range selected in the filters.

Example report with columns included:

Title	YOP	Section_Type	Access_Type	Access_Method	Metric_Type	Reporting_Period_Total
Academic Pediatrics	2018	Article	OA_Gold	Regular	Total_Item_Requests	1
Academic Pediatrics	2018	Article	Controlled	Regular	Total_Item_Requests	44
Academic Pediatrics	2019	Article	Controlled	Regular	Total_Item_Requests	38
Academic Pediatrics	9999	Article	Controlled	Regular	Total_Item_Requests	28
Academic Radiology	2018	Article	Controlled	Regular	Total_Item_Requests	46

Report with same filters without columns selected:

Title	Metric_Type	Reporting_Period_Total
Academic Pediatrics	Total_Item_Requests	111
Academic Radiology	Total_Item_Requests	116

Other information

You can also choose whether to display columns for:

- **Publisher**
- **Publisher_ID**
- **Platform**
- **DOI**
- **Proprietary_ID**
- **ISBN**
- **Print_ISSN**
- **Online_ISSN**
- **URI**
- **Data_Type,**

However, as these all relate to specific titles, selecting these columns will not affect the way the metrics are summarised.

Step 3: Select a service (platform)

Here you chose which supplier/service you want to view data for.

Service (Platform): ScienceDirect

From: Jan

Summary: Data_Type
Columns

Totals: Metric_Type Reporting_Period_Total

The list includes all services that should be supplying TR reports (Note: Oxford University Press Books are not yet available). This list is not specific to your institution or your selection. For example, if you select Data_Type=Book and then select a supplier that only publishes journals you will see no usage.

Step 4: Select a reporting period

Reporting period refers to the months in which the activity happened.

From: Jan 2019 To: Jan 2019 Results/page: 50 Get Report

Selecting multiple months will give you a reporting total as well as monthly details.

Then click **Get Report** to view the report.

What you will see

The page will jump down to the report.

Summary: Data_Type=Journal; Section_Type=Article, Book, Chapter, Other, Section; Access_Type=Controlled; Access_Method=Regular; Begin_YOP=0001; End_YOP=9999; Metric_Type=Total_Item_Requests, Unique_Item_Investigations

Totals:

Metric_Type	Reporting_Period_Total
Total_Item_Requests	113,505
Unique_Item_Investigations	58,212

Navigation: Previous page 01 02 03 04 05 06 07 08 ... 90 Next page Jump to page: 1 Go CSV TSV

Title	Metric_Type	Reporting_Period_Total	Jan-2019
Academic Pediatrics	Total_Item_Requests	24	24
Academic Pediatrics	Unique_Item_Investigations	20	20
Academic Radiology	Total_Item_Requests	34	34
Academic Radiology	Unique_Item_Investigations	29	29

Summary confirms the report you have run and is displayed below. This is useful if you want to change or refine your report.

The **Totals** table gives you a total for each metric you have selected. If you select both Controlled and OA_Gold for access type, you will see separate totals for these as well.

The columns will show Title, Metric_Type, Reporting_Period_Total, and each month, plus any other columns you have selected in step 3.

It is not possible to sort the report as there may be multiple metric types.

You can download the report as a CSV or TSV and then use spreadsheets to carry out further analysis.

Refining or changing your report

After clicking **Get Report**, the page jumps to the data that appears below the select menu. Scroll up to make changes to your selection.

Clear Filters will clear your filter selections. **Clear Columns** will clear your columns to include selections. The selected platform and date range remain unchanged.

You must click **Get Report** again to generate a new report.

Troubleshooting

If you are getting 'no usage found error' where you expect there to be data:

- check the Data_Type and Section_Type make sense for the supplier you have selected
- try selecting more options, include the column in the output, and see what is included
- check the reporting period date range (remember R5 reports do not include titles with zero usage)
- try running a standard view for the same service and reporting period

Standard view filter pre-sets

The tables below show the filter options you would need to select to replicate the standard views.

Note about YOP: All standard views for books and journals cover all years of publication. Due to the different nature of the material, this information is displayed differently. The TR_J4 is the only journal standard view that displays usage breakdown by YOP. Whereas, all book standard views show YOP (which is why there isn't a TR_B4).

Journal standard views

Standard view	Data Type	Section Type	Access Type	Access Method	YOP	Metric types	Columns to include
TR_J1	Journal	All	Controlled	Regular	All years	Total_Item_Requests Unique_Item_Requests	Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, Print_ISSN, Online_ISSN, URI

Standard view	Data Type	Section Type	Access Type	Access Method	YOP	Metric types	Columns to include
TR_J2	Journal	All	Controlled	Regular	All years	No_License Limit_Exceeded	Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, Print_ISSN, Online_ISSN, URI
TR_J3	Journal	All	Controlled OA_Gold	Regular	All years	Total_Item_Investigations Total_Item_Requests Unique_Item_Investigations Unique_Item_Requests	Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, Print_ISSN, Online_ISSN, URI, Access_Type
TR_J4	Journal	All	Controlled	Regular	All years (with breakdown shown)	Total_Item_Requests Unique_Item_Requests	Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, Print_ISSN, Online_ISSN, URI, YOP

Book standard views

Standard view	Data Type	Section Type	Access Type	Access Method	YOP	Metric types	Columns to include
TR_B1	Book	All	Controlled	Regular	All years	Total_Item_Requests Unique_Title_Requests	A Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, ISBN, Print_ISSN, Online_ISSN, URI, YOP
TR_B2	Book	All	Controlled	Regular	All years	No_License Limit_Exceeded	Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, ISBN, Print_ISSN, Online_ISSN, URI, YOP
TR_B3	Book	All	Controlled OA_Gold	Regular	All years	Total_Item_Investigations Total_Item_Requests Unique_Item_Investigations Unique_Item_Requests Unique_Title_Investigations Unique_Title_Requests	Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, ISBN, Print_ISSN, Online_ISSN, URI, YOP, Access_Type