Creating tailored reports using TR: Filter Title Master Report
A step-by-step guide

This guide:
• covers how to create your own reports
• explains the various options available
• gives tips to help you make your selection
Introduction

**Title Master Reports (TR)** are COUNTER Release 5 reports produced by content providers and gathered into JUSP.

The reports are highly detailed and granular. Filters can be applied to the report to create different views of the data.

The COUNTER standard views and JUSP’s custom views enable you to quickly access consistent reports across services. There may also be situations where you want to view or summarise data in a different way.

The “**TR: Filter Title Master Report**” is an advanced reporting tool in JUSP. It offers flexibility to generate reports to meet your specific requirements.

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.
Steps to produce your report in JUSP

1. Select report from menu

2. Select what data you would like to be included

3. Select which columns you would like to appear in the report output

4. Select how metric types are displayed

5. Select a service (platform)

6. Select a date range (reporting period)

7. Click Get Report
Tips

* means you must select at least one option

Click on filter name to select all options

Hover over for additional info
Filters: select what data to include in the report

<table>
<thead>
<tr>
<th>Filter name</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data type</td>
<td>Type of content you want to look at e.g. Journal or Book</td>
</tr>
<tr>
<td>Section type</td>
<td>The type of item being accessed by the user e.g. Article, Book or Chapter. Depends on the Data_Types as well as the type of supplier or service. 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.</td>
</tr>
<tr>
<td>Access type</td>
<td>Controlled covers any content item that was not open at the time it was accessed (i.e. 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 a hybrid publication or fully open access publication.</td>
</tr>
<tr>
<td>Access method</td>
<td>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.</td>
</tr>
<tr>
<td>YOP</td>
<td>Year of Publication. 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.</td>
</tr>
<tr>
<td>Metric Type</td>
<td>Metric Types are a way of describing what user action is being counted, for example Total_Item_Requests. These metrics are the figures you will see in the reports. You can select one or multiple metric types. Counts for different metric types cannot be added together. 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.</td>
</tr>
<tr>
<td>Custom</td>
<td>A JUSP feature that uses information not supplied in the source reports. Checking Core will filter the report to only show titles marked as Core in Knowledge Base Plus (KB+). 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’.</td>
</tr>
</tbody>
</table>

For more detail see: [https://www.projectcounter.org/code-of-practice-five-sections/3-0-technical-specifications/](https://www.projectcounter.org/code-of-practice-five-sections/3-0-technical-specifications/)
Columns to include

Choose detail to be displayed in the report

• Default
  • Title, Metric Type and counts are displayed in all reports by default and cannot be excluded

• Additional Non-COUNTER info
  • Core and DOAJ (Directory of Open Access Journals) information for journal titles is not included in 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 Section_Type, YOP (year of publication), Access_Type or Access_Method will add columns and show a breakdown for each attribute included rather than a total
  • When not selected, the report will still include all the information you selected in the filter but sum the totals

• Other information
  • Publisher, DOI, ISSN, ISBN etc. all relate to specific titles and selecting these columns will not affect the way the metrics are summarised
Display options

Default (Single Metric_Type per row)
- Metrics displayed on separate rows
- Monthly and reporting period totals
- Not sortable

Multiple Metric_TYPES per row
- Metrics displayed in columns
- Reporting period total only
- Sortable
Select service and reporting period

Service (platform)

- The list includes all active services that should be supplying TR reports.
- The service name may be different from the publisher name in R4 e.g. ScienceDirect (R5) and Elsevier (R4).
- 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.

- Reporting period refers to the months in which the activity happened.
- Selecting multiple months will give you a reporting total as well as monthly details.
Refining and troubleshooting

• After clicking **Get Report**, the page jumps to the data that appears below the selection options. 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.

• 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
Journal standard view settings

Selecting the following filters and columns to include will replicate the standard or custom views. Title, Metric_Type, Reporting_Total and monthly totals are included in all by default.

<table>
<thead>
<tr>
<th>Standard view</th>
<th>Data Type</th>
<th>Section Type</th>
<th>Access Type</th>
<th>Access Method</th>
<th>YOP</th>
<th>Metric types</th>
<th>Columns to include (standard view)</th>
<th>Columns to include (custom view)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TR_J1</td>
<td>Journal</td>
<td>All</td>
<td>Controlled</td>
<td>Regular</td>
<td>All years</td>
<td>Total_Item_Requests, Unique_Item_Requests</td>
<td>Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, Print_ISSN, Online_ISSN, URI</td>
<td>Core, Publisher, Platform, Print_ISSN, Online_ISSN</td>
</tr>
<tr>
<td>TR_J2</td>
<td>Journal</td>
<td>All</td>
<td>Controlled</td>
<td>Regular</td>
<td>All years</td>
<td>No_License, Limit_Exceeded</td>
<td>Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, Print_ISSN, Online_ISSN, URI</td>
<td>Core, Publisher, Platform, Print_ISSN, Online_ISSN</td>
</tr>
<tr>
<td>TR_J3</td>
<td>Journal</td>
<td>All</td>
<td>Controlled</td>
<td>Regular</td>
<td>All years</td>
<td>Total_Item_Investigations, Total_Item_Requests, Unique_Item_Investigations, Unique_Item_Requests</td>
<td>Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, Print_ISSN, Online_ISSN, URI, Access_Type</td>
<td>Core, DOAJ, Publisher, Platform, Print_ISSN, Online_ISSN, Access_Type</td>
</tr>
<tr>
<td>TR_J4</td>
<td>Journal</td>
<td>All</td>
<td>Controlled</td>
<td>Regular</td>
<td>All years (with breakdown shown)</td>
<td>Total_Item_Requests, Unique_Item_Requests</td>
<td>Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, Print_ISSN, Online_ISSN, URI, YOP</td>
<td>Core, Publisher, Platform, Print_ISSN, Online_ISSN, YOP, Metric_Type</td>
</tr>
</tbody>
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Book standard views settings

Selecting the following filters and columns to include will replicate the standard or custom views. Title, Metric_Type, Reporting_Total and monthly totals are included in all by default.

<table>
<thead>
<tr>
<th>Standard view</th>
<th>Data Type</th>
<th>Section Type</th>
<th>Access Type</th>
<th>Access Method</th>
<th>YOP</th>
<th>Metric types</th>
<th>Columns to include (standard view)</th>
<th>Columns to include (custom view)</th>
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</thead>
<tbody>
<tr>
<td>TR_B1</td>
<td>Book</td>
<td>All</td>
<td>Controlled</td>
<td>Regular</td>
<td>All years</td>
<td>Total_Item_Requests, Unique_Title_Requests</td>
<td>Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, ISBN, Print_ISSN, Online_ISSN, URI, YOP</td>
<td>Publisher, Platform, ISBN, DOI</td>
</tr>
<tr>
<td>TR_B2</td>
<td>Book</td>
<td>All</td>
<td>Controlled</td>
<td>Regular</td>
<td>All years</td>
<td>No_License, Limit_Exceeded</td>
<td>Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, ISBN, Print_ISSN, Online_ISSN, URI, YOP</td>
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</tr>
<tr>
<td>TR_B3</td>
<td>Book</td>
<td>All</td>
<td>Controlled</td>
<td>Regular</td>
<td>All years</td>
<td>Total_Item_Investigations, Total_Item_Requests, Unique_Item_Investigations, Unique_Item_Requests, Unique_Title_Investigations, Unique_Title_Requests</td>
<td>Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, ISBN, Print_ISSN, Online_ISSN, URI, YOP, Access_Type</td>
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