

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

Select report: TR: Filter Title Master Report 1. Select report from menu

Filters:

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

* Section_Type: Article Book Chapter Other Section 2. Select what data you would like to be included

* 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

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

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

Display: 4. Select how metric types are displayed

Default (Single Metric_Type per row) Multiple Metric_Types per row

Institution: A Dummy Institution 5. Select a service (platform)

Service (Platform): American Chemical Society (ACS) 6. Select a date range (reporting period)

From: Jan 2019 **To:** Jan 2019 **Results/page:** 50 7. Click Get Report Get Report

Tips

* means you must select at least one option

Filters:

* Data_Type:	<input type="checkbox"/> Book	<input type="checkbox"/> Database	<input type="checkbox"/> Journal	<input type="checkbox"/> Newspaper or New		
* Section_Type: ⓘ	<input checked="" type="checkbox"/> Article	<input checked="" type="checkbox"/> Book	<input checked="" type="checkbox"/> Chapter	<input checked="" type="checkbox"/> Other	<input checked="" type="checkbox"/> Section	<input checked="" type="checkbox"/>
* Access_Type: ⓘ	<input type="checkbox"/> Controlled	<input type="checkbox"/> OA_Gold				
* Access_Method:	Controlled - requires a licence; OA_Gold - Gold Open Access					
YOP: ⓘ	From: <input type="text" value="0001"/>	To: <input type="text" value="9999"/>				
* Metric_Type:	<input type="checkbox"/> Limit_Exceeded	<input type="checkbox"/> No_License	<input type="checkbox"/> Total_Item_Invest			

Click on filter name to select all options

ⓘ Hover over for additional info

Filters: select what data to include in the report

Filter name	Descriptions
Data type	Type of content you want to look at e.g. Journal or Book
Section type	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.
Access type	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.
Access method	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. 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 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.
Custom	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'.

For more detail see: <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

Title	Metric_Type	Reporting_Period_Total	Jan-2019	Feb-2019	Mar-2019
Academic Pediatrics	Total_Item_Requests	84	24	27	33
Academic Pediatrics	Unique_Item_Requests	67	20	19	28
Academic Radiology	Total_Item_Requests	122	34	43	45
Academic Radiology	Unique_Item_Requests	90	28	26	36
ACC Current Journal Review	Total_Item_Requests	21	10	3	8
ACC Current Journal Review	Unique_Item_Requests	16	8	3	5
Accident Analysis & Prevention	Total_Item_Requests	82	21	20	41
Accident Analysis & Prevention	Unique_Item_Requests	56	16	16	24
Accounting Forum	Total_Item_Requests	18	6	2	10
Accounting Forum	Unique_Item_Requests	15	4	1	10
Accounting, Organizations and Society	Total_Item_Requests	46	3	5	38
Accounting, Organizations and Society	Unique_Item_Requests	26	3	4	19
ACOG Clinical Review	Total_Item_Requests	4	0	0	4
ACOG Clinical Review	Unique_Item_Requests	4	0	0	4

Multiple Metric_Types per row

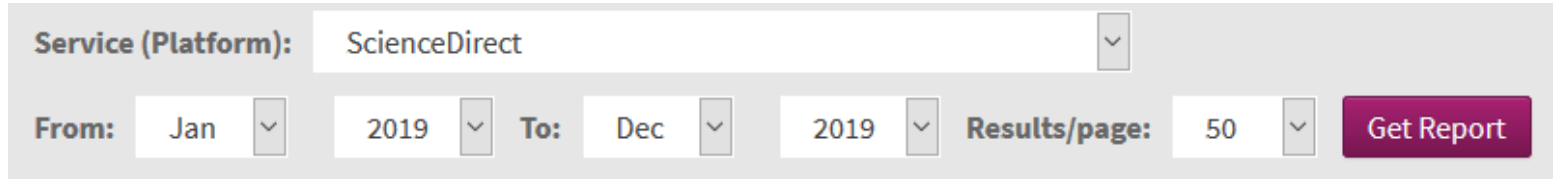
- Metrics displayed in columns
- Reporting period total only
- Sortable

Title	Total_Item_Requests	Unique_Item_Requests
Academic Pediatrics	84	67
Academic Radiology	122	90
ACC Current Journal Review	21	16
Accident Analysis & Prevention	82	56
Accounting, Organizations and Society	46	26
Accounting Forum	18	15
ACOG Clinical Review	4	4
Acta Agronomica Sinica	4	4
Acta Anaesthesiologica Taiwanica	4	2
Acta Astronautica	112	80
Acta Biomaterialia	246	167
Acta Colombiana de Cuidado Intensivo	26	24
Acta Ecologica Sinica	31	21
Acta Genetica Sinica	27	23

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.



The screenshot shows a form for generating a report. It features a dropdown menu for 'Service (Platform)' with 'ScienceDirect' selected. Below this, there are fields for 'From:' (Jan 2019) and 'To:' (Dec 2019), each with a month and year dropdown. A 'Results/page:' field is set to 50. A purple 'Get Report' button is located to the right of the 'Results/page:' field.

- 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.

Standard view	Data Type	Section Type	Access Type	Access Method	YOP	Metric types	Columns to include (standard view)	Columns to include (custom view)
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	Core, Publisher, Platform, Print_ISSN, Online_ISSN
TR_J2	Journal	All	Controlled	Regular	All years	No_License Limit_Exceeded	Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, Print_ISSN, Online_ISSN, URI	Core, Publisher, Platform, Print_ISSN, Online_ISSN
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	Core, DOAJ, Publisher, Platform, Print_ISSN, Online_ISSN, 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	Core, Publisher, Platform, Print_ISSN, Online_ISSN, YOP, Metric_Type

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.

Standard view	Data Type	Section Type	Access Type	Access Method	YOP	Metric types	Columns to include (standard view)	Columns to include (custom view)
TR_B1	Book	All	Controlled	Regular	All years	Total_Item_Requests Unique_Title_Requests	Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, ISBN, Print_ISSN, Online_ISSN, URI, YOP	Publisher, Platform, ISBN, DOI
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	Publisher, Platform, ISBN, DOI
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	Publisher, Platform, ISBN, DOI, Access_Type