



BioOne
COMPLETE

A Guide to COUNTER 5 and the SIQ Reporting Interface

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Contact Information for Questions

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Contact Information for Questions.....	1
What is SIQ?	3
What kind of reports can be pulled through this interface?	3
What is COUNTER, and what is COUNTER 5?	3
What kind of reports cannot be pulled through this interface?	3
How do I access the SIQ portal?	4
<i>Subscriber vs. Publisher Reports</i>	5
Publisher Reports.....	5
<i>Locating the Publisher Reports</i>	5
<i>Types of Publisher Reports</i>	6
Pulling a Publisher Report.....	6
<i>The Calendar Tool</i>	7
<i>Searching, Sorting, and Exporting a Report</i>	8
<i>Article Report</i>	8
<i>Issue Report</i>	9
<i>Journal Report</i>	10
COUNTER Reports.....	11
COUNTER 5 Terminology.....	11
<i>Investigations</i>	11
<i>Requests</i>	11
<i>Access Denials</i>	13
<i>Attributes and Parameters</i>	13
Running a COUNTER 5 Master Report.....	14
<i>Report Configuration</i>	14
<i>Discovery Panel</i>	15
<i>Report Designer</i>	16
Help	16
<i>In-portal help</i>	16

What is SIQ?

[SIQ](#) (ScholarlyIQ) is the vendor who provides BioOne Complete's reporting interface. They do not create the usage data, and are COUNTER-compliant.

What kind of reports can be pulled through this interface?

Three **Publisher Reports** are ready-made for publishers: the **Article**, **Issue**, and **Journal Reports**. These reports look very similar to the ones available on our previous platform, and require no filtering or organizing as with the COUNTER reports.

A limited suite of COUNTER 5 reports are available to publishers; we have included some guidance for these reports as well.

What is COUNTER, and what is COUNTER 5?

[COUNTER](#) (Counting Online Usage of Networked Electronic Resources) is an external organization who sets industry-wide Code of Practice: these are standards for collecting library usage data. This code dictates a standardized set of reports and types of usage.

Every so often, COUNTER releases a new Code of Practice, with updated reports. As of January 1, 2019, [COUNTER R5](#) is the most current Code of Practice.

As this is the type of usage libraries utilize, Compliance with COUNTER standards is mandatory.

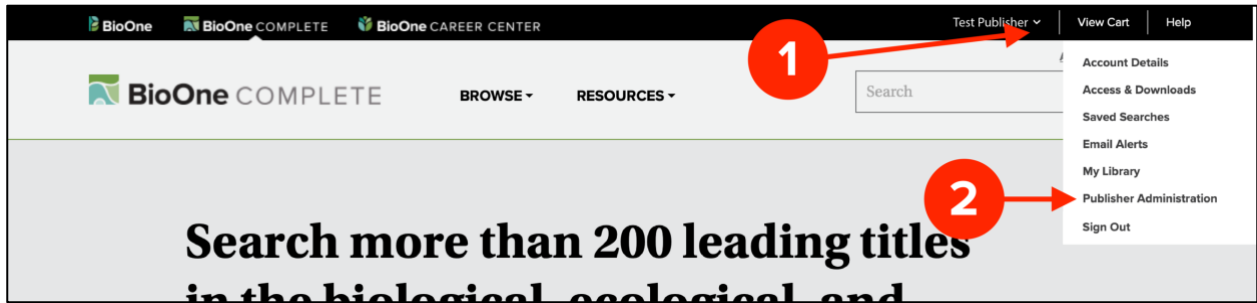
What kind of reports cannot be pulled through this interface?

Certain reports that were available through the previous platform are no longer available to through the publisher interface; these reports (listed below) are available upon request (alexandra@bioone.org).

- Usage by Institution
- Usage by Country

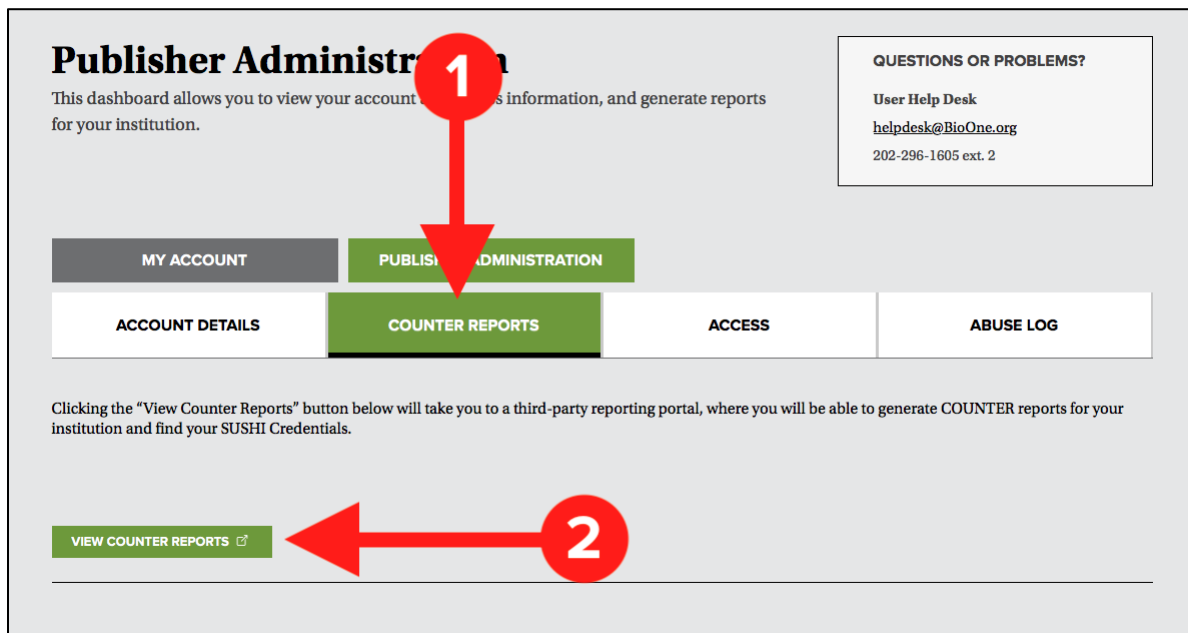
How do I access the SIQ portal?

To access the SIQ portal, first log into your BioOne Complete account. Once logged in, click on the small arrow next to the account name **(1)**.



In the drop-down menu that appears, click on **Publisher Administration (2)**. This will take you to the publisher administration dashboard.

This data is made available to you as a publisher through the SIQ reporting interface.

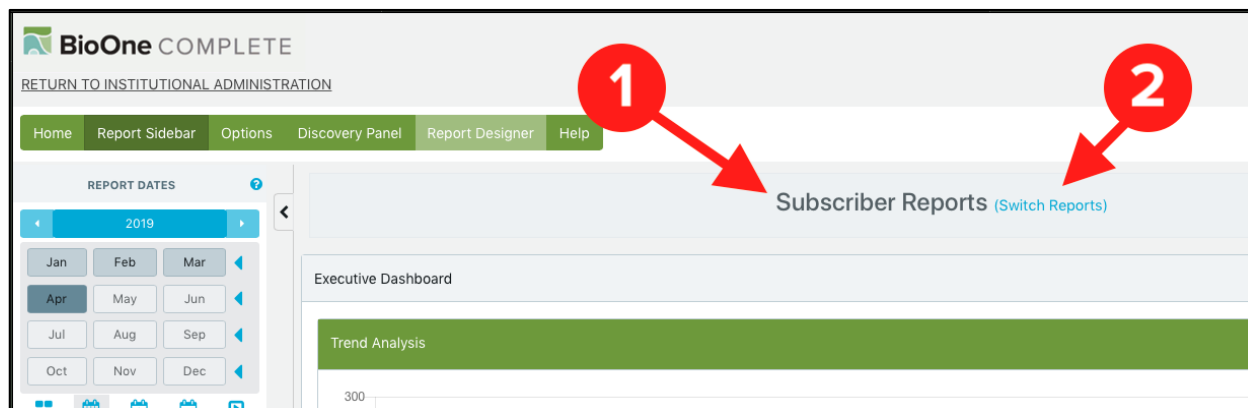


When you are in the publisher administration dashboard, click on the **COUNTER REPORTS tab (1)**. Once in the correct tab, scroll down and click **VIEW COUNTER REPORTS (2)**.

This will take you to the SIQ reporting dashboard for your publication.

Subscriber vs. Publisher Reports

Please note that there are two menus in the publisher interface: **Subscriber** and **Publisher**. The menu you are currently on is displayed at the top of the dashboard (1). **Subscriber Reports** is what will automatically display upon login. To move between reports, click on the link next to the menu title called **(Switch Reports)** (2).

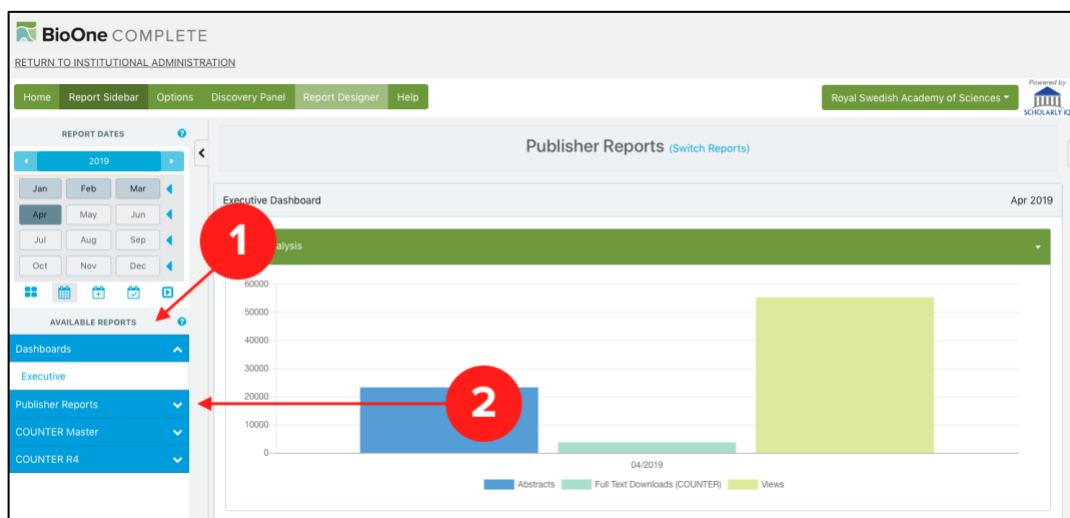


To access reports for subscriber usage of your content (i.e., library/institutional usage), make sure that **Publisher Reports** appears at the top.

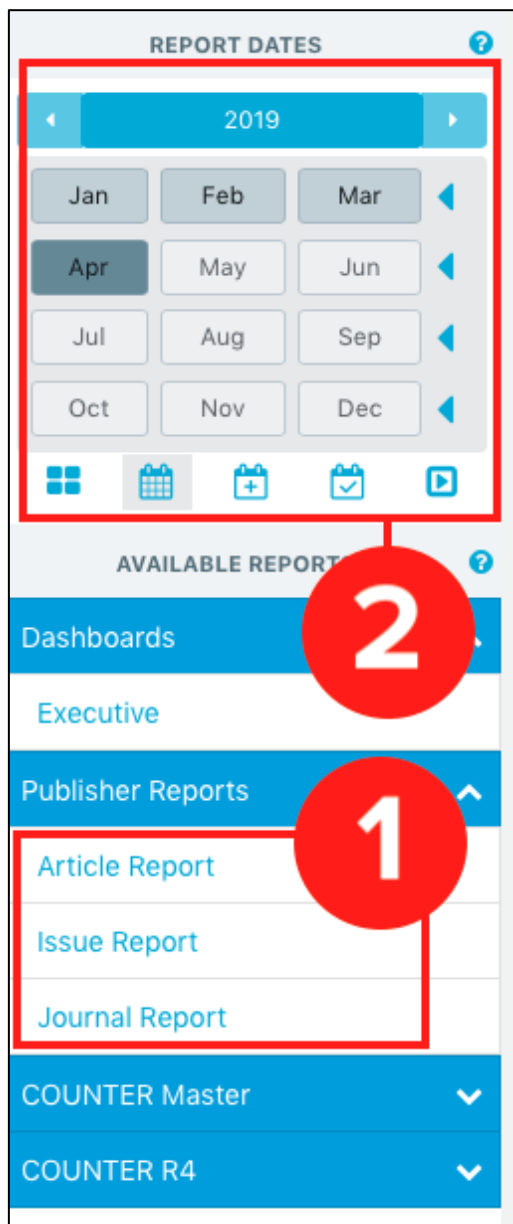
Publisher Reports

Locating the Publisher Reports

Once in the SIQ interface and in the **Publisher Reports** menu, navigate to the **Available Reports Sidebar** (1) and click on the small arrow next to the menu item **Publisher Reports** (2).



A drop-down menu will appear and display three reports: **Article Report**, **Issue Report**, and **Journal Report**.



Types of Publisher Reports

- **Article Report:** This lists usage on an article level, allowing you to identify popular/most-used articles. This report includes the article’s title, authors, issue, DOI, and usage, and rank compared to other articles.

This is very close to the “Top Article” report from the previous platform.

- **Issue Report:** This lists out the usage of your content by individual issue. Usage is broken out into Abstract hits, Full-text HTML hits, PDF hits, Full-text Total, and References hits.

This is very close to the “Top Issue” report from the previous platform.

- **Journal Report:** This lists out the usage of your content by content’s year of publication (and not Vol/Issue). Each year’s usage is broken out into Abstract hits, full-text HTML hits, PDF hits, Full-text Total, References hits, Supplementary material hits, and Table of Content hits.

This is very close to the “Journal” report from the previous platform.

More information about each article is provided later. Below are general instructions for pulling a report.

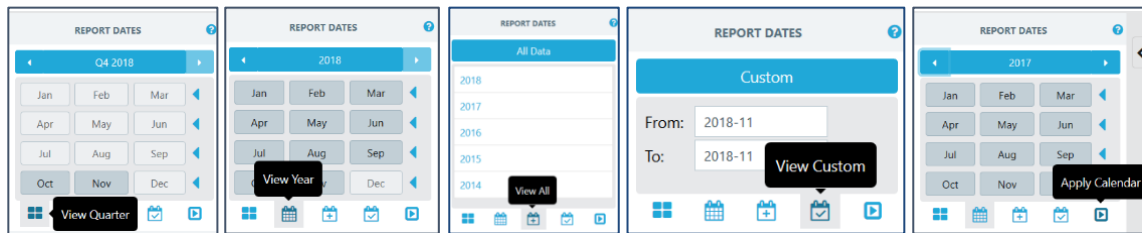
Pulling a Publisher Report

To pull one of the three publisher reports, first select the report you wish to create by clicking on it in the **Available Reports Sidebar (1)**.

Once you have selected your report, make sure to set the date range with the **Calendar Tool (2)**. Selecting date ranges from the Calendar control will apply the requested date range to the active report.

The Calendar Tool

This tool has many options for selecting a date range.



From left to right:

- **Usage by Quarter** – Choose this option to select a whole quarter.
- **By Month** – Select individual months by choosing the year, and then the month. Select a quarter by using the small blue arrow at the end of each row. You can also select more than one month by holding down Shift while choosing.
- **By Year** – Choose a whole year to pull usage data for.
- **Custom** – Enter a specific date range you wish to pull data for.
- **Apply Calendar** – Click here to apply your selected date range to the active report.

The report will appear in the table in the center of the screen. Please note that these reports **are only available for 2019 data**. Historical data is available upon request; please contact alexandra@bioone.org.

Searching, Sorting, and Exporting a Report

While the Publisher reports are pre-made, there are a few ways to sort/search these reports to make them more relevant to you.

The screenshot shows the BioOne COMPLETE interface for 'Publisher Reports'. The sidebar on the left lists 'AVAILABLE REPORTS' with 'Publisher Reports' selected. The main content area shows a table of reports for 'A Journal of the Human Environment' from April 1, 2019, to May 31, 2019. The table has columns for 'Journal Report', 'Print ISSN', 'Page Type', 'YOP', 'Online ISSN', 'Reporting Period Total', 'Apr-2019', and 'May-2019'. Red callouts 1, 2, 3, and 4 point to the 'Journal Report' header, the search bar, the pagination controls, and the export cogwheel icon, respectively.

Journal Report	Print ISSN	Page Type	YOP	Online ISSN	Reporting Period Total	Apr-2019	May-2019
MBIO: A Journal of the Human Environment	0044-7447	Abstracts		1654-7209	43895	23234	20661
MBIO: A Journal of the Human Environment	0044-7447	Abstracts	2000	1654-7209	4154	2247	1907
MBIO: A Journal of the Human Environment	0044-7447	Abstracts	2001	1654-7209	3255	1710	1545
MBIO: A Journal of the Human Environment	0044-7447	Abstracts	2002	1654-7209	7256	3834	3422
MBIO: A Journal of the Human Environment	0044-7447	Abstracts	2003	1654-7209	4060	2100	1960
MBIO: A Journal of the Human Environment	0044-7447	Abstracts	2004	1654-7209	3637	2007	1630
MBIO: A Journal of the Human Environment	0044-7447	Abstracts	2005	1654-7209	3797	2072	1725
MBIO: A Journal of the Human Environment	0044-7447	Abstracts	2006	1654-7209	3443	1831	1612
MBIO: A Journal of the Human Environment	0044-7447	Abstracts	2007	1654-7209	5822	2955	2867
MBIO: A Journal of the Human Environment	0044-7447	Abstracts	2008	1654-7209	3329	1657	1672
MBIO: A Journal of the Human Environment	0044-7447	Abstracts	2009	1654-7209	2714	1408	1306
MBIO: A Journal of the Human Environment	0044-7447	Abstracts	2010	1654-7209	1043	703	340
MBIO: A Journal of the Human Environment	0044-7447	Abstracts	2011	1654-7209	1385	710	675
MBIO: A Journal of the Human Environment	0044-7447	Full-text HTML		1654-7209	49517	26290	23227

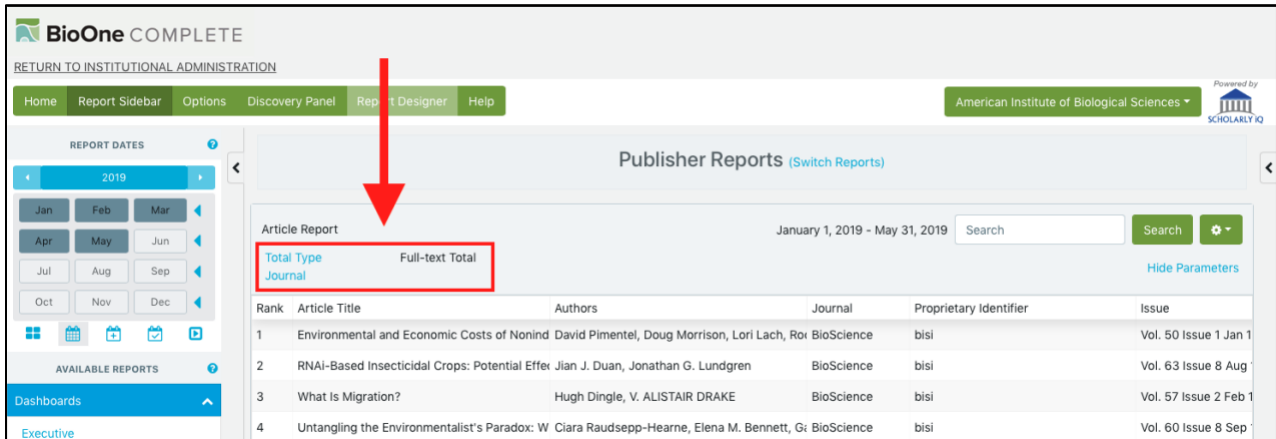
- 1. Headers** - Sort the data in any column in ascending (click once) or descending order (click twice) by clicking on that column's header. You can also drag and drop the column headers to rearrange the format of the data.
- 2. Search Bar** - Search for specific items like DOI (for Top Article reports) or Issue.
- 3. Report Navigations**- Navigate through the report table and the change number of rows displayed.
- 4. Export** - Click the small cog wheel. From the drop-down menu that appears, select **Export to CSV**. A CSV version of this report will appear in your Downloads folder.

Article Report

The **Article Report** lists usage on an article level, allowing you to identify popular/most-used articles. This report includes the article's title, authors, issue, DOI, and usage, and rank compared to other articles.

To pull this report follow the instructions above, selecting the **Article Report** in the **Available Reports Sidebar** and select the date range you wish to pull a report for.

Once the report is active, you have a few options to further narrow this report:



At the top of the report are two filters: **Total Type** and **Journal**:

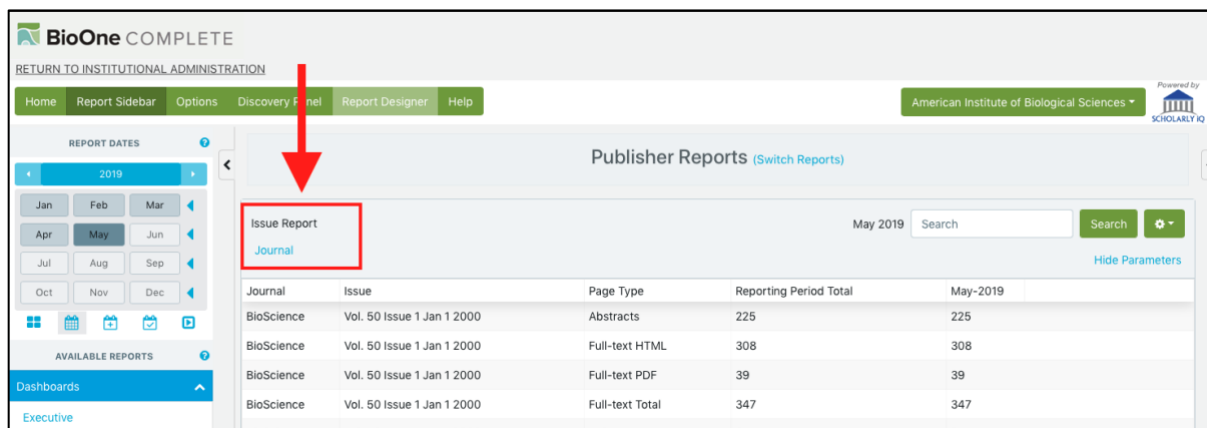
- **Total Type**: Click on **Total Type** to select the *type* of usage you wish to see for the articles listed. You can choose from Full-text HTML, Full-text PDF, and Full-text Total (for combined PDF/HTML usage). The **Article Report** automatically displays Full-text Total when first running a report.
- **Journal**: If your organization publishes more than one title, click on **Journal** to toggle which journal you would like to see usage for.

Please note that after altering the filters on this report, you will be prompted to run the report again. The data that then displays is the filtered data.

Issue Report

The **Issue Report** lists out the usage of your content by individual issue. Usage is broken out into Abstract hits, Full-text HTML hits, PDF hits, Full-text Total, and References hits.

Once the report is active, you can filter the report to specific titles your institution publishes:



Click on **Journal** to select the title you wish to see the **Issue Report** for. Please note that after altering the filters on this report, you will be prompted to run the report again. The data that then displays is the filtered data.

Journal Report

The **Journal Report** lists out the usage of your content by content's year of publication (and not Vol/Issue). Each year's usage is broken out into Abstract hits, full-text HTML hits, PDF hits, Full-text Total, References hits, Supplementary material hits, and Table of Content hits.

Once the report is active, you can filter the report to specific titles your institution publishes:

The screenshot shows the BioOne COMPLETE interface. The top navigation bar includes 'Home', 'Report Sidebar', 'Options', 'Discovery Panel', 'Report Designer', and 'Help'. The user is logged in as 'American Institute of Biological Sciences'. The main content area is titled 'Publisher Reports (Switch Reports)' and shows a table of reports for the period 'January 1, 2019 - May 31, 2019'. A red arrow points to the 'Journal Report' link in the left sidebar, which is highlighted with a red box. The table below shows the following data:

Journal	YOP	Page Type	Print ISSN	Online ISSN	Reporting Period Total	Jan-2019	Feb-2019	Mar-2019
BioScience		Abstracts	0006-3568	1525-3244	67192	8776	12320	155
BioScience		Full-text HTML	0006-3568	1525-3244	115994	16380	22434	256
BioScience		Full-text PDF	0006-3568	1525-3244	23279	2132	2368	484
BioScience		Full-text Total	0006-3568	1525-3244	139273	18512	24802	304

Click on **Journal** to select the title you wish to see the **Journal Report** for. Please note that after altering the filters on this report, you will be prompted to run the report again. The data that then displays is the filtered data.

COUNTER Reports

If you would like to explore COUNTER data, two COUNTER 5 Master reports are available for your title/titles:

Report ID	Name	Description
TR	Title Master Report	A customizable report detailing activity at the title level (journal, book, etc.) that allows the user to apply filters and select other configuration options.
IR	Item Master Report	A granular, customizable report showing activity at the level of the item (article, chapter, media object, etc.) that allows the user to apply filters and select other configuration options.

The COUNTER 5 Master reports are highly customizable, but require a base level of understanding of COUNTER's terminology.

COUNTER 5 Terminology

COUNTER 5 has a distinct set of usage categories:

Investigations

- **'Total_Item_Investigations'**: the total number of times a content item or information related to a content item was accessed.
- **'Unique_Item_Investigations'**: the number of unique content items (e.g. articles) investigated by a user.
- **'Unique_Title_Investigations'**: the number of unique titles (e.g. journals) investigated by a user.

Requests

- **'Total_Item_Requests'**: the total number of times the full text of a content item was downloaded or viewed. **Note: This is the metric that counts the total number of hits for an item and does not include abstracts.**
- **'Unique_Item_Requests'**: the number of unique content items (e.g. articles) requested by a user.
- **'Unique_Title_Requests'**: the number of unique titles requested by a user.

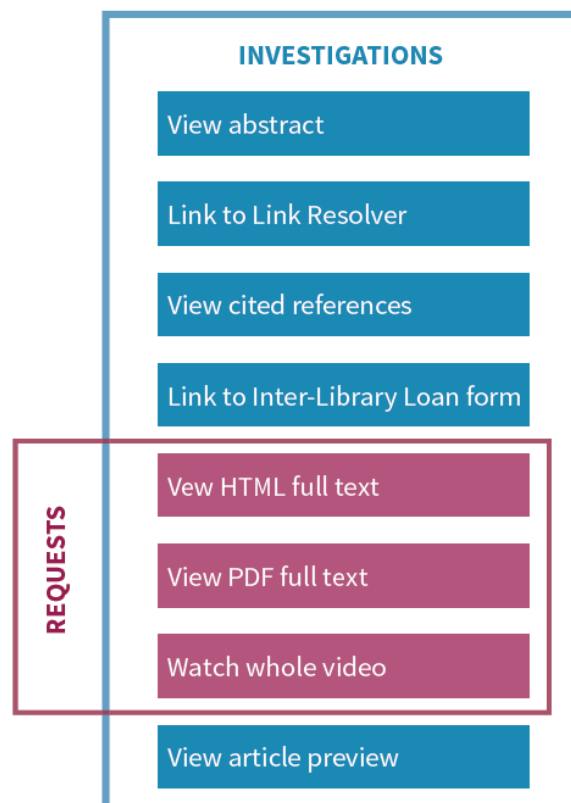


Figure 1: The relationship between "Investigations" and "Requests"

Access Denials

Access denials are sometimes known as turnaways. Two varieties of access denial metrics are tracked in Release 5:

- **'No_License'**: counted when a user is unable to access a unique content item because their institution does not have a license to the content.
- **'Limit_Exceeded'**: counted when a user is unable to access a unique content item because their institution's cap on the number of simultaneous users has been exceeded.

Attributes and Parameters

Release 5 of the COUNTER Code of Practice has added a series of elements and attributes to COUNTER's longer-standing metrics. These help to provide much more granular information in an organized way, as well as letting the COUNTER team maintain and amend the Code of Practice over time.

Briefly, the new elements are:

- **'Data_Type'**: used to group content at the level of the Title.
- **'Section_Type'**: used when Data_Types are delivered in small sub-units (e.g. journal articles).
- **'Access_Type'**: used to determine whether content was Open Access or not.
- **'Access_Method'**: applies when a Host allows Text and Data Mining (TDM) of their content, and is able to distinguish TDM activity from all other activity.
- **'YOP'**: Year of Publication, the four-digit year in which the Version of Record was published.

For full details please see the [Code of Practice](#).

Running a COUNTER 5 Master Report

COUNTER 5 Master reports are designed to be able to show all available COUNTER metrics and attributes, and for these to be dynamically filtered and changed, and have features that the Publisher reports do not.

In these reports, you can:

- Add/remove filters and attributes as needed;
- Use the Report Designer Tab to easily customize the parameters and format of a report;
- Remove unwanted columns by dragging the column header up;
- And more.

To begin running a COUNTER 5 Master Report, first select one of the Master Reports from the **Available Reports Sidebar**. Once you've selected the report you wish to pull, use the **Calendar Tool** to set a date range.

Report Configuration

The current report configuration is visible at the top of the Master Report. Clicking on an attribute allows you to edit or change which attributes and metrics are displayed in the report.

The screenshot shows the BioOne COMPLETE interface. The top navigation bar includes 'Home', 'Report Sidebar', 'Options', 'Discovery Panel', 'Report Designer', and 'Help'. The 'Report Designer' tab is active. The main area is titled 'Publisher Reports (Switch Reports)'. On the left, there is a 'REPORT DATES' calendar for 2019 and an 'AVAILABLE REPORTS' sidebar. The 'Title Master Report' configuration is highlighted with a red box, showing the following settings:

Attribute	Value
Access Methods	All
Access Types	All
Attributes	
Data Types	All
Granularity	Month
Item Identifiers	
Metric Types	All
Section Types	All
YOP	

The main report area displays a table with the following data:

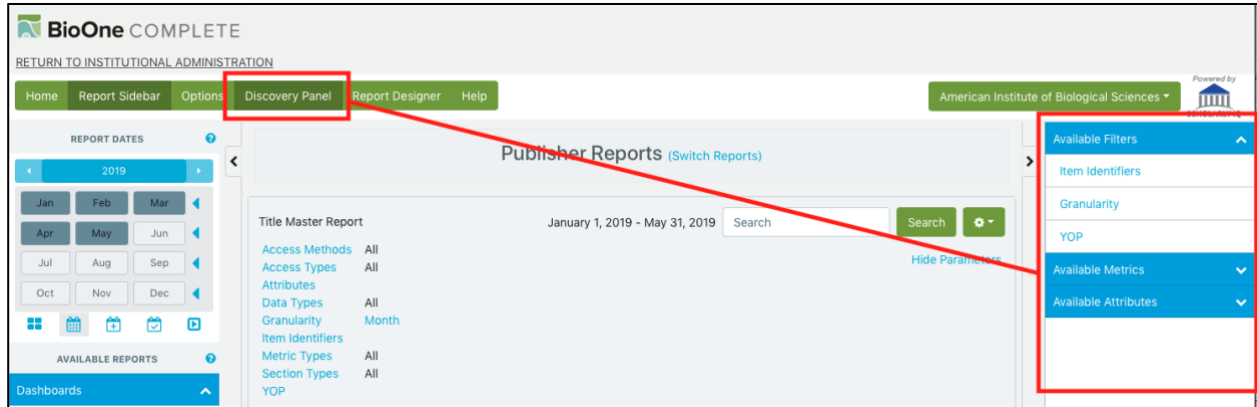
Title	Publisher	Publisher_ID	Platform	DOI	Proprietary_ID	ISBN	Print_ISSN	Onl
BioScience	American Institute of Biological Sciences		BioOne	10.1525/bisi	BIOONE:bisi		0006-3568	152
BioScience	American Institute of Biological Sciences		BioOne	10.1525/bisi	BIOONE:bisi		0006-3568	152

Clicking on available attributes or metrics allows you to add or remove which attributes or metrics are included.

When all the desired attributes and metrics are selected, select **Run Report** to re-generate the report according to your newly applied parameters.

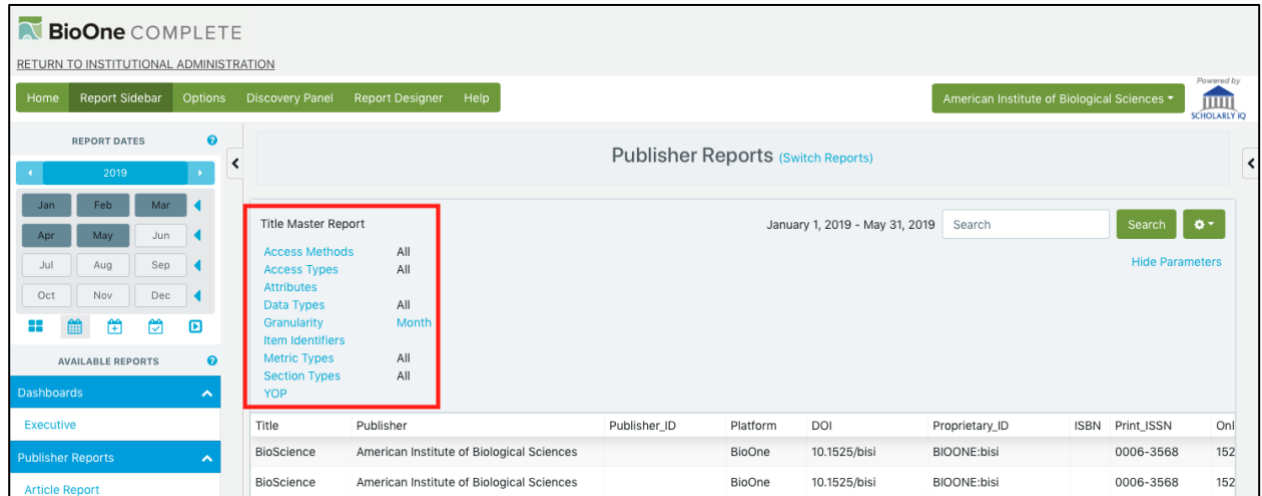
Discovery Panel

Clicking the **Discovery Panel** button in the top toolbar expands or collapses the right sidebar. The **Discovery Panel** allows you to add and remove filters, attributes, and metrics when a COUNTER 5 Master report is displayed.



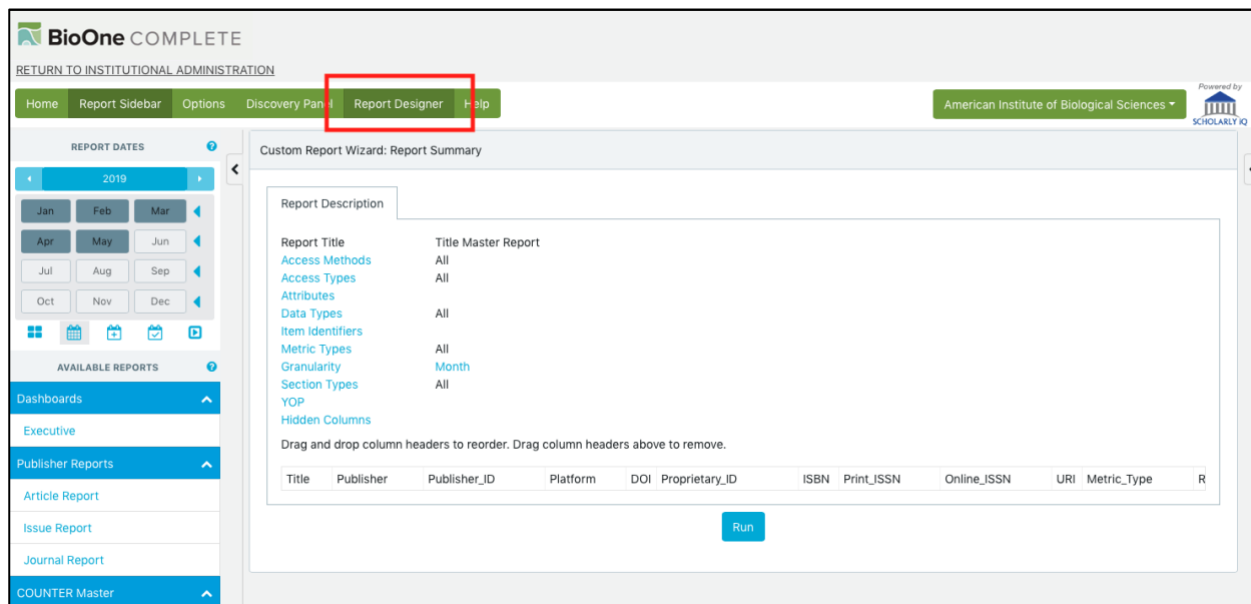
Selecting (or dragging and dropping) attributes and metrics will add them to the selected Master report. You will then be able to re-generate the report.

Click on an attribute in the report configuration area to remove it. Once clicked, the attribute will disappear.



Report Designer

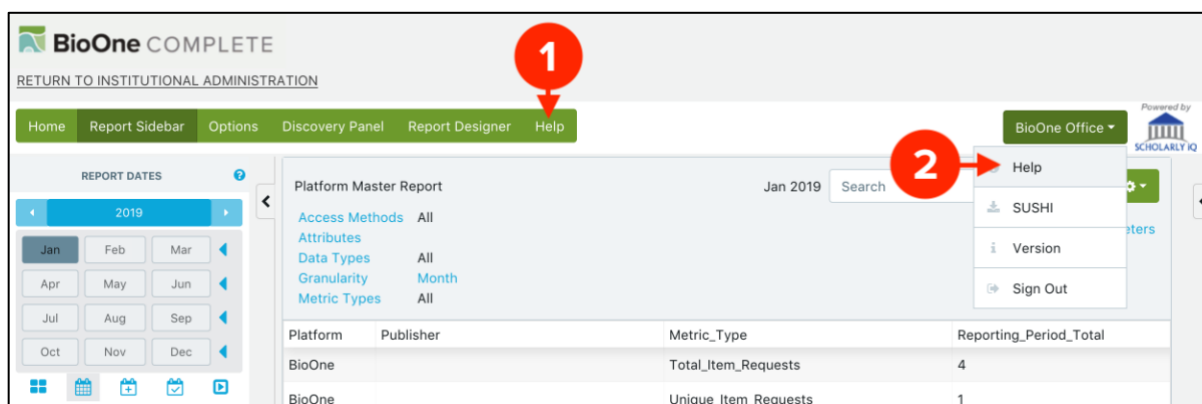
The **Report Designer** also allows you to change report parameters when a report is displayed by opening a Report Description. Click on **Report Designer**, visible in the Report Toolbar at the top of the screen.



Help

In-portal help

Help materials, including the **Help Widget** are available within the reporting portal. Help is available from the Help button in the top toolbar (1) or from the dropdown when you click on your account name (2).



If you need reports for usage before 2019, or general questions about your usage, please contact alexandra@bioone.org.