

Report on JUSP, KB + and Intota Assessment

Introduction

This report compares the statistical information available from JUSP, KB+ and Intota Assessment, and considers how these can be used by the Information Resources team to inform the purchasing of electronic journals. This report will begin by exploring the different reports and data that is available from the three systems above and identify ways in which we would like the systems to be developed. It will then move on to propose an ideal workflow for using these three systems and conclude by examining the benefits the use of the three systems will bring

Journals Usage Statistics Portal (JUSP)

JUSP is designed to give libraries a single point of entry to obtain journals usage data, which can be analysed to inform purchasing decisions and demonstrate the value for money of their collections.

JUSP offers a number of different reports that are useful in analysing the use and value of a journal. One of the reports is the JR1-JR1a report which provides you with the total usage figure for the publisher and with the figures for the individual titles from that publisher over a chosen period. This is particularly useful for the packages such as Taylor and Francis where we do not subscribe to the back files. In addition it provides you with the number of articles accessed which were available as Open Access (OA). This statistic is valuable to know as it allows us to dismiss OA use from the JR1-JR1a figures to give us a more accurate cost per use.

However, there is one major limitation of this report. It does not provide you with a breakdown of the figures through the period chosen either by month or by year, instead it gives the cumulative total of the entire date range. However this total can be useful to know as it can be used with other figures to provide other evaluation measures such as the cost per download for the life of the package.

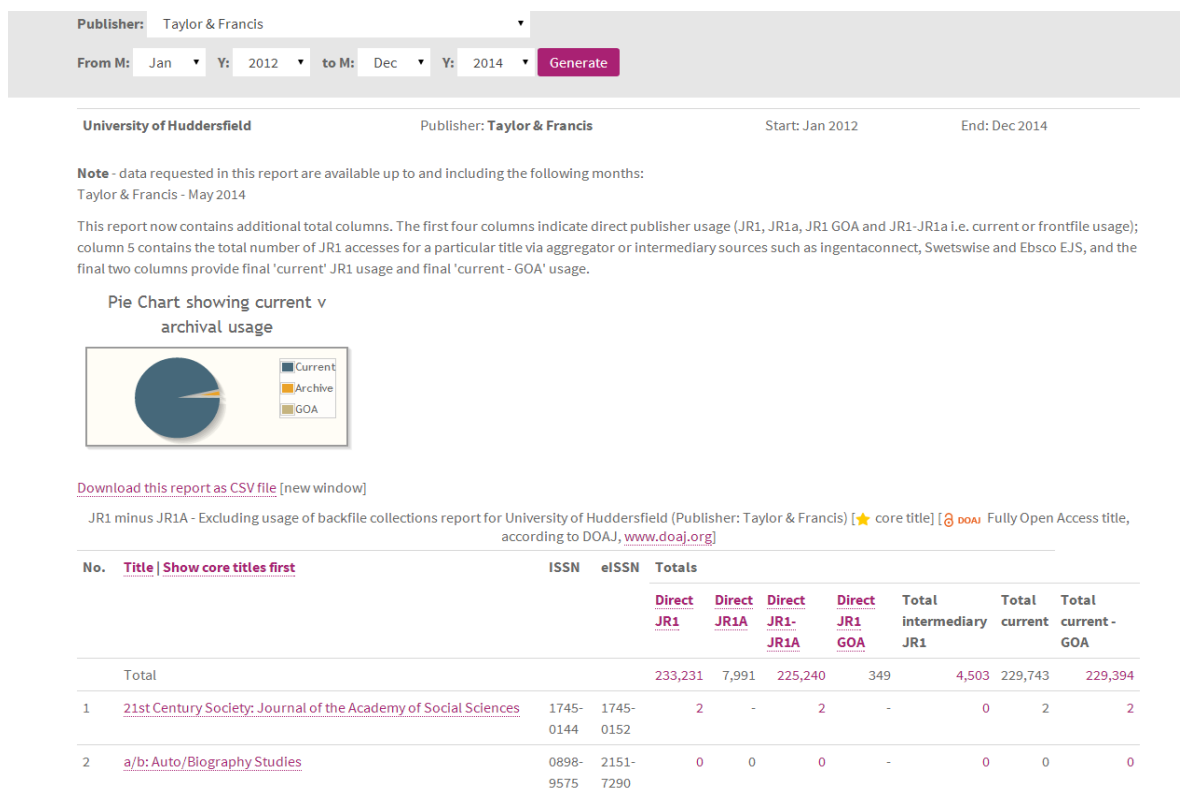




Image 1: A screenshot of the JR1 reports excluding backfile usage and GOA

To obtain a breakdown of usage statistics by month you have to use the 'JR1, JR1a and JR1 GOA' report which provides a breakdown of your usage statistics by month and by title by publisher. One of the problems with this report is that it does not exclude the JR1a statistics, so the statistics include the downloads from the backfiles which are not part of the NESLi2 deals and therefore should not be included in the statistical analysis as it could skew the figures. This will be a problem for the publishers where we also purchase the backfiles. This information is really useful for a yearly review as it allows you to identify patterns of use and evaluate the value of a single title. It also allows us to identify any low use titles which could potentially be cancelled.

A useful report from JUSP is the 'View usage of titles and deals' which retrieves the statistics for the packages by a publisher. This data for the entire package is needed once a year, and then at the end of the package lifetime to evaluate the use of the package and to help us decide whether this is the correct package to renew. Although this report is very useful as it provides us with the Current JR1 total for all the titles within the package, and so excludes the backfile downloads, it only provides the headline figures for the titles for each year. Therefore it is not particularly useful for analysing the monthly use of the package over its lifetime. Many of the higher education institutions take NESLi2 packages, therefore these are the statistics that many people require, therefore would it be possible to provide a monthly

breakdown of this report including the JR1, JR1a, JR1 GOA and Current JR1 for all the titles of the package?

List of titles vs deal  core title]  DOAJ Fully Open Access title, according to DOAJ, www.doaj.org

Journal Title	Print ISSN	Online ISSN	Direct JR1 Total	Direct JR1a Total	Direct Frontfile (JR1-JR1a)	JR1 intermediary	Current JR1 total	Deal
Cultural and Social History	1478-0038	1478-0046	0	0	0	1	1	
Architecture and Culture	2050-7828	2050-7836	0	0	0	14	14	Visual Culture Collection
Design and Culture	1754-7075	1754-7083	0	0	0	20	20	Visual Culture Collection
Design Journal, The	1460-6925	1756-3062	0	0	0	44	44	Visual Culture Collection
Fashion Practice: The Journal of Design, Creative Process & the Fashion	1756-9370	1756-9389	0	0	0	37	37	Visual Culture Collection

Image 2: A screenshot of the ‘View usage of titles and deals’ report

It would also be useful for us to know which of these titles are core titles. Not only would it allow us to identify any core titles that do not have high usage and could perhaps be considered for cancellation, but it also allows us to identify any high use titles that we do not have as an individual subscription which we should consider purchasing at the end of the package lifetime as an individual subscription so that we do not lose access to the title. Although it is possible to identify your core titles in JUSP, we have tended to identify them in KB+ as this system has been developed to help us manage our NESLi2 packages and core titles. Having already identified our core titles in KB+ it is not time efficient to re-add the same information to JUSP – would it be possible for there to be more data sharing between the two systems and have this information transferred over?

The ‘trends over time’ is a nice report showing the total accesses per month to a publisher’s journals. It has an easy to read table and a pictorial representation of the data (unfortunately this is not downloadable). This report is good for giving us an initial idea as to whether the publisher’s journals are meeting the current needs of the students or whether we need do further investigation to ensure that the journals are a correct purchase. Unfortunately this report is only available at publisher level and although it is useful, it would be more pertinent to our needs if this report was available at package level.

Summary of usage - includes gateway and host intermediary figures

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	% change
2014	12086 (111)	11295 (484)	12804 (573)	10039 (460)	6448 (369)	3750 (210)	2995 (169)	2717 (166)	3581 (173)	10993 (572)	-(0)	-(0)	76708 (3287)	-

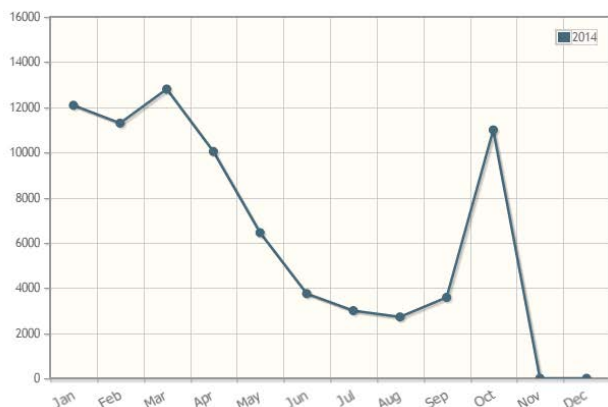


Image 3: A screenshot of the 'Trends over time' report

'Titles with high use' is a report which identifies the highest use titles either by a publisher or of all those available in JUSP. This is useful as it allows us to identify which titles are meeting the needs of the users and so cannot be cancelled, if it were possible to transfer the core title data from KB+ this report would be even more useful as it would allow us to identify any titles which we didn't have individual subscriptions to and purchase if necessary. Again the report would be more beneficial to us if we were able to run the report at package level. The report that shows the highest use journals within JUSP is interesting but meaningless as it does not take into account c. 50% of our collection whose usage statistics are not available through JUSP.

The 'Benchmarking' report, while it is interesting, I am unsure as to what regular use this report can be put. There are, I feel, too many variables within this report to draw any meaningful conclusions on which to base purchasing decisions. Not all the institutions within the various groups take the same packages and therefore will have access to different numbers of titles, the institutions have different subject specialisms which means the student's needs will be different and there will be different study habits which may influence the use of electronic resources.

KB+

KB+ is predominately designed to help libraries manage and maintain their subscriptions and as such is increasingly forming an integral part of our workflows. The system currently includes some basic statistical data which is pulled from JUSP where it is available. An important part of managing subscriptions is constantly analysing and evaluating them to ensure that they are providing value for money and are meeting the needs of your students,

therefore it seems logical that usage statistics should be accessible in KB+ and it would be beneficial if this element of KB+ could be enhanced.

It is currently possible at journal title level within a package to see:

- JR1 (current and archive)
- JR1-JR1a (which is the use of the current package only)
- JR1 GOA (usage of any Gold Open Access articles)
- JR1a (usage of the archive)

This information is useful to be able to obtain when a title leaves a package, which we are alerted to via the alerts feature in KB+, as it allows us to easily analyse the statistics and decide what to do with the title. If the title is from a current collection and the usage is predominantly from an archive (which are frequently available freely via Jisc) or from GOA articles we don't have to take any action. Similarly if the title has low usage we know we can take no action or if it is a core title we can consider cancelling the individual subscription. However, if the usage of the current year's is high we know that we should retain our individual subscription or recommend for individual purchase if the title is not core, so that we do not lose access to a heavily used title.

At the moment this information is displayed in a table format within the title information section of a journal within a package. Although having such information readily available is great for helping us make purchasing decisions, the layout of the information in the table does not allow patterns of use to be quickly identified. To identify and analyse usage, which is often easier through the pictorial representation of data, it is currently necessary to download/export the statistics into Excel and then create graphs. It would be more beneficial if the usage data was displayed within KB+ as a line graph with the usage of the four years represented as different lines on the same graph. The graph would also need to be downloadable as an image so that we would be able to use it in reports, infographics, etc. It would also be useful to retain the function of be able to download the usage data as an Excel download so that if we wanted we would be able to carry out further analysis of the data, for example percentage of use change over the years, archive: GOA: current use ratio or percentage.

JUSP Usage Statistics

Reporting Period	JUSP:JR1	JUSP:JR1~JR1a	JUSP:JR1GOA	JUSP:JR1a
2011-06	0	0	0	0
2011-07	0	0	0	0
2011-08	0	0	0	0
2011-09	0	0	0	0
2011-10	0	0	0	0
2011-11	0	0	0	0
2011-12	0	0	0	0

Image 4: A screenshot of the individual title statistics available in KB+

KB+ currently only supplies usage at title level within a package. It would be great if it could collate all the usage data of the titles within the packages to allow us to see the usage of the entire package. Here again a downloadable visual representation of some of the main statistical data such as a line graph for the different uses and a pie chart to show current, GOA and archive use would be really useful. This data would also need to be available as an excel download to allow further and local analysis to be done.

Perhaps there could be another tab within each subscription for statistics? Other statistical information for the package that it would also be beneficial to know are:

- The top performing titles within a package and whether they are core or not
- The lowest performing titles and whether they are core or not (this would be good for our cancellation allowance)

All these statistics should also be downloadable as Excel file with the core titles identified to allow us to carry out further analysis. These features would be useful to know at the end of each year to help us identify titles for possible cancellation, but also towards the end of the package lifetime to allow us to analyse the overall use and value of the package.

Although the renewals comparison spreadsheet does provide usage for all the titles within the package with all the core information identified it does still require a lot of manual manipulation to extract meaningful statistics. What we would ideally like for each package is a downloadable spreadsheet with the following information:

- Title
- Core status
- 1st yr package JR1, 1st yr package JR1a, 1st yr package JR 1-a, 1st yr package GOA
- 2nd yr package JR1, 2nd yr package JR1a, 2nd yr package JR 1-a, 2nd yr package GOA

- 3rd yr package JR1, 3rd yr package JR1a, 3rd yr package JR 1-a, 3rd yr package GOA
- Life-time of package JR1, life-time of package JR1a, life-time of package JR 1-a, life-time of package GOA.
- Totals for each year at the bottom of the titles

This spreadsheet would contain a large number of columns and figures but it would be really useful as it would be easy to manipulate and provide some really meaningful statistics.

Intota Assessment

Intota Assessment replaced 360 Counter in July as the tool with which to evaluate and assess the value of your collection by providing a wide variety of reports for the entire collection - print and electronic, monographs and serials. Assessment is the first element of Intota to be released and aims to help libraries demonstrate the value of their collections and to help inform purchasing decisions to develop the collection.

One of the reports available to help evaluate the value of our collection is the Cost per Use (CPU) of ejournals. This CPU is worked out by taking the price of the resource, which we have input into Resource Manager, and the monthly statistics gathered through SUSHI. We have set-up Intota Assessment to collect our usage statistics, for as many publishers as possible, from JUSP. This is because JUSP works continuously with the publishers to ensure that the usage statistics that are captured are accurate and comparable (conforming to the COUNTER – standard). As we have set up the financial year in Resource Manager to run from Aug to July, Assessment takes this into account and uses the correct figures based on our financial year e.g. for the statistics for the calendar year 2013 the cost per use for Jan-Jul are worked out using 7/12 of the 2013 price and Aug-Dec are worked out using 5/12 of the 2014 price.

Assessment contains not only the traditional CPU report for an individual ejournal by title or ISSN, but it is also possible to find out the CPU for a provider and subject. The traditional report is useful as it allows us to determine if a journal is value for money by comparing it to the Jisc standard of £1.00 per use being considered value for money. When an individual journal is identified as having a CPU higher than £1.00 per use, it allows us to identify it as a risk or if it is on a reading list inform the academic that it is not being used to allow them to see if it is still relevant or if it needs flagging up to their students. The other CPU reports, by provider and subject, which are available are also very useful as it allows us to consider purchasing individual subscriptions against packages to determine which is the best value for money. Unfortunately it is not possible to run this report against specific databases within

the Proquest knowledgebase, which would relate directly to the different NESLi2 packages as Proquest now use the package lists from KB+. It would be great if we were able to do this, perhaps by limiting the report after choosing the provider to a specific database that we have activated within that provider. This would help us to evaluate the value and use of a NESLi package which would be very useful as it would help us decide at the end of each year which titles could be cancelled as part of our cancellation allowance. It would also be useful at the end of package lifetime as it would help us to decide whether the entire package was value for money and that we should renew, or if the package was not used enough to justify the expense and if there are just individual titles that we should be subscribing to.

Title	Print ISSN	Online ISSN	2014			Uses	Cost	Cost per Use
			Uses	Cost	Cost per Use			
			57041	51,019.57	0.89	57041	51,019.57	0.89
AIDS Care	0954-0121	1360-0451	46	34.65	0.75	46	34.65	0.75
AIHA Journal	1542-8117	1542-8125	0			0		
AJOB Empirical Bioethics	2329-4515		0			0		
AJOB Neuroscience	2150-7740		0			0		
ANQ: A Quarterly Journal of Short Articles, Notes and Reviews	0895-769X	1940-3364	0	34.65		0	34.65	
ANQ	0895-769X	19403364	12			12		
Accountability in Research	0898-9621	1545-5815	6	34.65	5.78	6	34.65	5.78
Accounting and Business Research	0001-4788	2159-4260	145	34.65	0.24	145	34.65	0.24
Accounting Education	0963-9284	14604489	93	34.65	0.37	93	34.65	0.37
Accounting History Review	2155-2851	2155-286X	0	34.65		0	34.65	
Accounting History Review	2155-2851		15			15		
Accounting in Europe	1744-9480	1744-9499	0	34.65		0	34.65	
Accounting in Europe	1744-9480	1744-9480	22			22		
Acta Agriculturae Scandinavica, Section C, Food Economics	1650-7541	1651-288X	0			0		
Acta Agriculturae Scandinavica	0001-5121		0			0		
Acta Borealia	0800-3831	1503-111X	0	34.65		0	34.65	
Acta Borealia	0800-3831		2			2		
Acta Botanica Gallica	1253-8078	2166-3408	0			0		
Acta Linguistica Hafniensia	0374-0463	1949-0763	0	34.65		0	34.65	
Acta Linguistica Hafniensia: International Journal of Linguistics	0374-0463	1949-0763	1			1		
Action in Teacher Education	0162-6620	2158-6098	0	34.65		0	34.65	
ACTION IN TEACHER EDUCATION	0162-6620		22			22		
Action Learning: Research and Practice	1476-7333	1476-7341	0	34.65		0	34.65	
Action Learning	1476-7333	14767341	139			139		
Activities, Adaptation & Aging	0192-4788	1544-4368	0	34.65		0	34.65	

Image 5: A screenshot of the CPU report for journals

'Ejournal performers' is a report which returns the usage of all the journals we subscribe to in the knowledgebase for a period that we have chosen. This is great as it allows us to identify our top performers, however it would be useful if some further information could be included on this report such as the database that it is in so that we can see which packages are being most heavily used. In the long term it would be great if the core information that we have input into KB+ could be imported into Proquest and then the core titles identified on these reports. This would allow us to evaluate our historic individual subscriptions in light of the journals usage of all of our resources.

'Ejournals Zero Usage' is a report which returns a list of all the journals with zero usage in a period that we have specified. This would be a really good report as it would provide an initial hit list identifying titles needing further investigation to consider for cancellation. However, a major limitation of this is that it currently returns titles that we have not subscribed to in the knowledgebase and so would expect the usage to be zero. We are only interested in the ejournals that we have subscribed to and have zero usage as they are obviously not fulfilling our user's needs.

'Ejournal Change in use' is a report which returns the percentage change in use on a month by month basis. Although it is possible to search for all the journals on this report I think this would have to be used to collect more information about individual journals. The results of all of the journals are meaningless but it would be useful for a title that we were considering cancelling in order to construct a fuller picture of how users are using this resource.

Title	2014			
	June		July	
	Uses	% Chg from Prev Mth	Uses	% Chg from Prev Mth
Accounting and Business Research	7	16.67%	11	57.14%
Accounting Education			11	450.00%
Adoption Quarterly			3	200.00%
Africa Education Review	4	100.00%		
American journal of bioethics : AJOB			5	66.67%
Angelaki : a new journal in philosophy, literature, and the social sciences			6	50.00%
Applied Economics			4	33.33%
Applied Financial Economics			5	150.00%
Archives and Records	4	100.00%		
Art Therapy: Journal of the American Art Therapy Association			5	150.00%
Asia Pacific Journal of Education			5	25.00%
Asia Pacific Journal of Tourism Research			6	100.00%
Asian Journal of Communication	2	100.00%		
Assessment & Evaluation in Higher Education	45	4.65%		
Assessment in education : principles, policy & practice			11	37.50%
Australasian Journal Of Philosophy	22	450.00%		
Australian Feminist Studies	7	40.00%		
Australian Journal of Learning Difficulties	4	300.00%		
Australian Social Work	7	40.00%		
Behaviour & Information Technology	11	83.33%		
Bilingual Research Journal	7	600.00%		
British Educational Research Journal			6	100.00%
British Journal for the History of Philosophy	4	100.00%		
British Journal of Guidance & Counselling			35	483.33%
British Journal of Religious Education			8	700.00%

Image 6: A screenshot of the 'Ejournal Change in use' report

Proposed workflow and benefits

Given the different strengths of the systems above it is recommended that we use them in the following ways.

- It is recommended that we use JUSP to identify general usage trends, such as decreasing usage, which may require further investigation.
- It is recommended that we use the 'comparison renewal tool' within KB+ to analyse NESLi2 packages usage at title level during the renewal period: identifying titles for cancellation and high usage titles that we may want to purchase an individual subscription for.
- It is recommended that we use the usage reports at title level within KB+ to analyse usage of a title which is changing publisher. Using this information we should be able to create reports to recommend action to the Collection Management Group.
- It is recommended that we use Intota Assessment to assess and evaluate individual titles, either individual subscriptions or titles identified through the work in KB+ and JUSP for further investigation.

Recommendations

It should be noted that development still needs to occur in all systems for them to provide the statistics that are needed without a lot of manipulation. Please find our recommendations for the different systems.

Recommendations for JUSP

- We recommend that JUSP provide an option to breakdown the figures through the period chosen by either month or by year in the 'JR1-JR1a report'.
- We recommend that JUSP provide a month breakdown and include the JR1, JR1a, JR1 GOA and Current JR1 statistics in the 'View usage of titles and deals' report.
- We recommend that JUSP provides all pictorial representations of data as downloadable files.
- We recommend that there is more data sharing between JUSP and KB+.
- We recommend that all the reports are developed to be run at NESLi2 package level.

Recommendations for KB+

- We recommend that the usage of an individual journal is displayed as a line graph with the usage of the four years represented as different lines on the same graph.
- We recommend that all pictorial representations of data are available as downloadable files.
- We recommend that there is more data sharing between JUSP and KB+.

- We recommend that there is another tab within each subscription for statistics which would collate the usage data of titles within the package and allow us to see the usage of the entire package
- We recommend that within this tab there is also reports showing:
 - The top performing titles within a package and whether they are core or not
 - The lowest performing titles and whether they are core or not (this would be good for our cancellation allowance)
- We recommend that a downloadable spreadsheet with the information below is made available for each package.
 - Title
 - Core status
 - 1st yr package JR1, 1st yr package JR1a, 1st yr package JR 1-a, 1st yr package GOA
 - 2nd yr package JR1, 2nd yr package JR1a, 2nd yr package JR 1-a, 2nd yr package GOA
 - 3rd yr package JR1, 3rd yr package JR1a, 3rd yr package JR 1-a, 3rd yr package GOA
 - Life-time of package JR1, life-time of package JR1a, life-time of package JR 1-a, life-time of package GOA.
 - Totals for each year at the bottom of the titles

Recommendations for Intota Assessment

- We recommend that the CPU report is developed to be able to run it against specific databases with the Proquest knowledgebase.
- We recommend that there is more data sharing between KB+ and Proquest.
- We recommend that further information, such as the database the journal is in, is included in the Ejournal's performers report.
- We recommend that the Ejournal's Zero usage report is developed to exclude the titles that we have not subscribed to.

In the long term we do not really want to have to maintain and visit JUSP as a separate system, as we would prefer this data and functionality to be embedded within KB+. It is felt that KB+ is the appropriate place for this data as it is designed to help us manage our electronic subscriptions, a key part of which is analysing and evaluating their use and value. Additional KB+ holds all the title level package information which could be used by JUSP to allow reports to be run at package level. However it is recognised that the both the functionality and the verified data of JUSP is a vital part of the subscription workflow.