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# **OpenEdition Counter 5 Documentation**

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# COUNTER 5 DOCUMENTATION

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**Note:** This documentation is available in [French](#) and [English](#). Expand the “Read the Docs” panel at the bottom of the sidebar to see the different versions.

Cette documentation est disponible en [français](#) et en [anglais](#). Cliquez sur le menu “Read the Docs” en bas à gauche pour accéder aux différentes versions linguistiques.

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This application allows institutions and consortia subscribing to *OpenEdition Freemium for Journals* or *OpenEdition Freemium for Books* to access their usage statistics for the OpenEdition platform in Counter 5 format.

OpenEdition’s Counter 5 service is regularly certified by an independent audit.



The COUNTER Code of Practice for Release 5 is available on Counter Website: <https://www.projectcounter.org/code-of-practice-five-sections/abstract/>.

The Code of Practice 5.0.1 has been translated into French thanks to the efforts of the Inist-CNRS and the Couperin.org consortium: [https://www.projectcounter.org/telecharger-ici-le-code-de-bonnes-pratiques-counter\\_v5\\_fr\\_5-0-1-en-version-pdf/](https://www.projectcounter.org/telecharger-ici-le-code-de-bonnes-pratiques-counter_v5_fr_5-0-1-en-version-pdf/)

Counter 5 reports are available:

- as tsv files, accessible at <https://counter5.openedition.org>;
- in json format accessible via Sushi protocol at the following address: <https://counter5.openedition.org/api/doc>.



## CREDENTIALS

### 1.1 Counter 5 Service

- URL: <https://counter5.openedition.org>
- Institution Credentials:
  - Username and password are identical to your Library Backoffice credentials: <https://freemium.openedition.org/library>
- Consortium credentials:
  - Ask for your credentials by email at the following address: [assistance-abonnes@openedition.org](mailto:assistance-abonnes@openedition.org)

### 1.2 Sushi API

- URL: <https://counter5.openedition.org/api>
- Documentation URL: <https://counter5.openedition.org/api/doc>
- Institution Credentials:
  - `requestor_id`: identical to your Library Backoffice Username: <https://freemium.openedition.org/library>
  - `api_key`: you can retrieve and regenerate your API Key in your Library backoffice:
    - \* *API Menu > Authentication Key.*
    - \* If it is not generated or if you want to modify it, click on *Generate a new key.*
  - `customer_id`: identical to `requestor_id`.
- Consortium credentials:
  - Ask for your credentials by email at the following address: [assistance-abonnes@openedition.org](mailto:assistance-abonnes@openedition.org)





## AVAILABLE REPORTS

Available reports are presented below. Each Report is provided in the form of a *Master Report*, customizable with parameters, and *Standard Views* where Metric Types, filters and attributes are preselected.

The *Metric Types* are usage metrics defined by Counter. You will find below a description of each.

Using a *filter* in a Master Report limits the content of the report to a particular criterion. For example the choice of a filter YOP=2020 (*Year Of Publication*) will limit the report to content published in 2020.

Using an *attribute* in a Master Report distribute each metric according to this attribute. For example, choosing a YOP (Year Of Publication) attribute for a TR report will return the metrics for each type broken down by year of publication.

### 2.1 Platform Reports

#### 2.1.1 PR | Platform Master Report

A customizable report summarizing activity across a content provider's platforms that allows the user to apply filters and attributes.

- **Type :**
  - Master Report
- **Available Metric Types :**
  - Total\_Item\_Investigations
  - Total\_Item\_Requests
  - Unique\_Item\_Investigations
  - Unique\_Item\_Requests
  - Unique\_Title\_Investigations
  - Unique\_Title\_Requests
  - Searches\_Platform
- **Available Filters :**
  - Data\_Type
  - Access\_Method
- **Available Attributes :**
  - Data\_Type

- Access\_Method

## 2.1.2 PR\_P1 | Platform Usage

Platform-level usage summarized by *Metric Type*.

- **Type :**
  - Standard View
- **Preselected Metric Types :**
  - Total\_Item\_Requests
  - Unique\_Item\_Requests
  - Unique\_Title\_Requests
- **Preselected Filters :**
  - Access\_Method=Regular
- **Preselected Attributes :**
  - none

## 2.2 Title Reports

### 2.2.1 TR | Title Master Report

Customizable report detailing activity at the title level (journal, book) that allows the user to apply filters and attributes.

- **Type :**
  - Master Report
- **Available Metric Types :**
  - Total\_Item\_Investigations
  - Total\_Item\_Requests
  - Unique\_Item\_Investigations
  - Unique\_Item\_Requests
  - Unique\_Title\_Investigations
  - Unique\_Title\_Requests
  - No\_License
  - Limit\_Exceeded
- **Available Filters :**
  - Data\_Type
  - Section\_Type
  - YOP
  - Access\_Type
  - Access\_Method

- **Available Attributes :**

- Data\_Type
- Section\_Type
- YOP
- Access\_Type
- Access\_Method

## 2.2.2 TR\_B1 | Book Requests (Excluding OA\_Gold)

Reports on full-text activity for books, excluding Gold Open Access content, as Total\_Item\_Requests and Unique\_Title\_Requests.

- **Type :**

- Standard View

- **Preselected Metric Types :**

- Total\_Item\_Requests
- Unique\_Title\_Requests

- **Preselected Filters :**

- Data\_Type=Book
- Access\_Type=Controlled
- Access\_Method=Regular

- **Preselected Attributes :**

- YOP

## 2.2.3 TR\_B2 | Book Access Denied

Reports on Access Denied activity for books where users were denied access because their institution did not have a license for the book. OpenEdition does not limit the number of simultaneous accesses to a resource. The Metric\_Type Limit\_Exceeded does not return any results.

- **Type :**

- Standard View

- **Preselected Metric Types :**

- No\_License
- Limit\_Exceeded

- **Preselected Filters :**

- Data\_Type=Book
- Access\_Method=Regular

- **Preselected Attributes :**

- YOP

## 2.2.4 TR\_B3 | Book Usage by Access Type

Reports on book usage showing all applicable Metric\_Types broken down by Access\_Type.

- **Type :**
  - Standard View
- **Preselected Metric Types :**
  - Total\_Item\_Investigations
  - Total\_Item\_Requests
  - Unique\_Item\_Investigations
  - Unique\_Item\_Requests
  - Unique\_Title\_Investigations
  - Unique\_Title\_Requests
- **Preselected Filters :**
  - Data\_Type=Book
  - Access\_Method=Regular
- **Preselected Attributes :**
  - YOP
  - Access\_Type

## 2.2.5 TR\_J1 | Journal Requests (Excluding OA\_Gold)

Reports on usage of journal content, excluding Gold Open Access content, as Total\_Item\_Requests and Unique\_Item\_Requests.

- **Type :**
  - Standard View
- **Preselected Metric Types :**
  - Total\_Item\_Requests
  - Unique\_Item\_Requests
- **Preselected Filters :**
  - Data\_Type=Journal
  - Access\_Type=Controlled
  - Access\_Method=Regular
- **Preselected Attributes :**
  - none

## 2.2.6 TR\_J2 | Journal Access Denied

Reports on Access Denied activity for journal content where users were denied access because their institution did not have a license for the title. OpenEdition does not limit the number of simultaneous accesses to a resource. The Metric\_Type Limit\_Exceeded does not return any results.

- **Type :**
  - Standard View
- **Preselected Metric Types :**
  - No\_License
  - Limit\_Exceeded
- **Preselected Filters :**
  - Data\_Type=Journal
  - Access\_Method=Regular
- **Preselected Attributes :**
  - none

## 2.2.7 TR\_J3 | Journal Usage by Access Type

Reports on usage of journal content for all Metric\_Types broken down by Access\_Type (Controlled or OA\_Gold).

- **Type :**
  - Standard View
- **Preselected Metric Types :**
  - Total\_Item\_Investigations
  - Total\_Item\_Requests
  - Unique\_Item\_Investigations
  - Unique\_Item\_Requests
- **Preselected Filters :**
  - Data\_Type=Journal
  - Access\_Method=Regular
- **Preselected Attributes :**
  - Access\_Type

## 2.2.8 TR\_J4 | Journal Requests by YOP (Excluding OA\_Gold)

Breaks down the usage of journal content, excluding Gold Open Access content, by year of publication (YOP), providing counts for the Metric\_Types Total\_Item\_Requests and Unique\_Item\_Requests.

- **Type :**
  - Standard View
- **Preselected Metric Types :**
  - Total\_Item\_Requests
  - Unique\_Item\_Requests
- **Preselected Filters :**
  - Data\_Type=Journal
  - Access\_Type=Controlled
  - Access\_Method=Regular
- **Preselected Attributes :**
  - YOP

## METRIC TYPES

### 3.1 Investigations / Requests

The Counter 5 specification divides the consultation of content elements according to the types *Request* and *Investigation*.

A *Request* is an access to a full text content item: an article in HTML or PDF, a full journal issue in PDF, a book chapter or a full book, in HTML, PDF or ePub.

An *Investigation* is an access to a full-text content item OR to information presenting that content item: access to journal issue or book, access to abstracts of moving wall articles, access to abstracts of books an book chapters in exclusive access. Note that Requests accesses are also counted in Investigations.

You can read the complete and illustrated description formulated by Counter at the following URL: <https://www.projectcounter.org/code-of-practice-five-sections/3-0-technical-specifications/#commonattributes>.

### 3.2 Total\_Item\_Investigations and Total\_Item\_Requests

The *Total\_Item\_Investigations* and *Total\_Item\_Requests* metrics count all accesses to a resource. When a user is accessing a resource (an article, a book or a chapter of a book...) several times during a *user session*, each access to this resource is counted in *Total\_Item\_\**. Eventual double clicks are ignored.

### 3.3 Unique\_Item\_Investigations and Unique\_Item\_Requests

The *Unique\_Item\_Investigations* and *Unique\_Item\_Requests* metrics count the number of content items (chapters, articles, etc.) accessed, considered only once by *user session*.

### 3.4 Unique\_Title\_Investigations et Unique\_Title\_Requests

The metrics *Unique\_Title\_Investigations* and *Unique\_Title\_Requests* are only applicable for books. They measure the number of unique accesses to a book during a user session. Thus, a reader's accesses to 3 chapters of a full-text book during a *user session* will only be counted once in the *Unique\_Title\_Requests* metric.

### 3.4.1 User session

Used in the Unique\_\* measurements computation, a user session is defined by 3 criteria:

- the user IP address;
- the user-agent;
- the date + the time of the visit (between 0 and 23; minutes and seconds are not considered)

This is a session approximation. Indeed, OpenEdition does not record the user sessions of the readers. This method is valid according to the Counter 5 Code of Practice: [7.3 Counting Unique Items](#).

### 3.5 No\_License

Records access denied to a resource in restricted access. On OpenEdition, this can be:

- journal articles under embargo;
- articles or journal issues in PDF or ePub format for journals of the Open Access Freemium bundle, for non-subscribing institutions;
- books or chapters of books in restricted access, not acquired by the institution;
- books or book chapters in PDF or ePub format in restricted access or Open Access Freemium, not acquired by the institution.

### 3.6 Limit\_Exceeded

OpenEdition ne limite pas le nombre d'accès simultanés à une ressource. Le Metric\_Type Limit\_Exceeded ne renvoie donc aucun résultat.

### 3.7 Searches\_Platform

User searches available at the Platform level only.

On OpenEdition, this matches the searches done :

- on OpenEdition Search (<https://search.openedition.org>);
- in the journal catalog (<https://www.openedition.org/catalogue-journals>);
- in the book catalog (<https://books.openedition.org/catalogue>);
- in a particular book (e.g. <https://books.openedition.org/oep/8713?query=archive>).



## **SUSHI API**

The Sushi API documentation is available at this address: <https://counter5.openedition.org/api/doc>.



## COUNTER 5 AND OPENEDITION FREEMIUM

Journals and books published in *Open Access Freemium* are available in open access in HTML format and in restricted access for PDF and ePub formats. As a result, and following the recommendations of the *Technical Advisory Group Counter*:

- Requests on HTML content are counted with an `Access_Type='OA_Gold'`.
- Requests on PDF and ePub content are counted with an `Access_Type='Controlled'`.

A subscribing institution will therefore be able to observe in its Counter 5 reports, for the same journal, requests having for `Access*_Type "OA_Gold"` (requests for HTML versions) AND requests having for `*Access_Type "Controlled"` (requests for PDF and ePub versions).



## DATE OF REPORT AVAILABILITY AND RESPONSE TIME

### 6.1 Dates and availability of reports

- The Reports are available as of July 2020.
- Reports for a given month are available from the 5th of the following month.
- Reports are available for 2 years plus the current year. Thus, reports for January 2021 and February 2021 will be available until 12/31/2023. It will not be possible to get the reports once the availability period has expired. Therefore, the data will have to be harvested beforehand.

### 6.2 Response time and caching

This service handles large volumes of data and can require significant computing time.

If the computing time of a report exceeds the limit defined by Counter 5 (120 sec.), the application will send a warning inviting you to reexecute your request. In this case, the calculation of the report continues in background and when you re-execute the request after a few minutes, the application will have the pre-calculated report and will be able to return it to you.

This behavior also applies to Sushi which will return the exception 1011 defined by Counter 5: <https://www.projectcounter.org/appendix-f-handling-errors-exceptions/>

The computing time depends on the complexity and size of the requested report, in particular the simultaneous use of several attributes, the use of time ranges of several months, reports for consortia.

To facilitate the use of the application, the reports of the last months (about 4 last months) are pre-cached (in cache memory). The response time is therefore significantly improved for recent months. For older reports, patience is required.



**CERTIFICATION**

OpenEdition's Counter 5 service is regularly certified by an independent audit.







## OPENEDITION

OpenEdition is a comprehensive digital publishing infrastructure at the service of scientific information in the Humanities and social Sciences. The OpenEdition portal includes four publishing and information platforms in the humanities and social sciences: [OpenEdition Journals](#) , [OpenEdition Books](#), [Hypotheses](#) (research blogs) and [Calenda](#) (announcements of international academic events). The portal is thus a space dedicated to the promotion of research, publishing tens of thousands of scientific documents that promote open access, while respecting the economic equilibrium of publications.

<https://www.openedition.org>



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**NEED HELP?**

- For questions related to your credentials: [assistance-abonnes@openedition.org](mailto:assistance-abonnes@openedition.org)
- For other questions about the Counter 5 service: [counter@openedition.org](mailto:counter@openedition.org)