



RHODES UNIVERSITY



INNOVATIVE USERS GROUP
SOUTHERN AFRICA

SIERRA: ERM and usage statistics

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ERM Statistics

- Configuring resources for statistical data
- Importing statistics



ERM Statistics - Configuration

- Pre-requisites for ERM Statistics
 - Order records are completed
 - Electronic Resource records completed

The screenshot shows the Sierra Catalog ERM interface. At the top, there is a menu bar with 'File', 'Edit', 'View', 'Go', 'Tools', 'Reports', 'Admin', and 'Help'. Below the menu bar is the 'sierra' logo and a 'FUNCTION' dropdown menu set to 'Catalog ERM'. A search bar contains the text 'y RESOURCE NAME' and 'Sage', with a 'Search' button and a 'Local' dropdown. To the right of the search bar are icons for 'New', 'View', 'Edit', 'Summary', 'Print', and 'Close'. Below the search bar is a 'Phrase' dropdown menu with a list of search terms: 'SAGE Journals Online - SAGE Premier 2015 (N...', 'SAGE Journals Online - SAGE Premier 2015 (R...', 'SAGE Journals Online - SAGE Premier 2015 (...', 'SAGE Publications WSU (WSU)', 'SAGE Reference Online (Rhodes)', 'SAGE Research Methods (NMMU)', 'SAGEOLIT (NMMU)', and 'SAGEOLIT (Rhodes)'. The main area is titled 'Results' and contains a table with the following data:

Format	Description	Summary	Status
1	Indexed Entry: <i>SAGE Journals Online - SAGE Premier 2015 (NMMU)</i> E-Journal Collection SAGE Journals Online - SAGE Premier 2015 (NMMU) http://0-online.sagepub.com.wam.seals.ac.za	e10006953	ACTIVE
2	Indexed Entry: <i>SAGE Journals Online - SAGE Premier 2015 (Rhodes)</i> E-Journals SAGE Journals Online - SAGE Premier 2015 (Rhodes) http://0-online.sagepub.com.wam.seals.ac.za	e10000628	ACTIVE

Rhodes University/ Department / Unit / Document / Date



ERM Statistics - Configuration

- Configure resource record
 - Platform provider in *Access Provider* field
 - If not in contact list, add in *Contact List*
- **Note:**
 - Access provider / contact DOES NOT equal subscription agent or intermediary



Browse Sage Local

e10000628 Last Updated: 01-06-2015 Created: 20-06-2007 Revisions: 63

Rights Type	SIGNED LICENSE	Package Type	c COMPLETE	Access Provider	sage SAGE Publications
Suppress	- DISPLAY	Trial Begin Date	- -	Location	rain RU Online Resources
Resource Code 1	p PUBLISHER	Trial End Date	- -	Publisher	sage SAGE Publications
Resource Code 2	- NONE	Renewal Date	31-10-2014	Copyright Holder	sage SAGE Publications
Resource Code 3	- NONE	Registration Date	- -	Data Provider	sage SAGE Publications
Resource Code 4	- NONE	Activation Date	01-01-2011	Consortium	none
Resource Status	- ACTIVE	Termination Date	- -		

Resource Name: SAGE Journals Online - SAGE Premier 2015 (Rhodes)

Resource ID: edu.stanford:sageprem15

Resource Type: E-Journals

Resource Format: HTML & PDF

Description: SAGE Publications publishes more than 500 peer reviewed full text journals in the areas of Communication Studies, Criminology, Education, Health Sciences, Management & Organization Studies, Materials Science, Political Science, Psychology, Sociology, and Urban Studies & Planning. The SAGE Journals Online platform supports enhanced search features (e.g. Fielded Boolean searches and CrossRef searches), Open URL linking, RSS feeds, and CiteTrack e-mail alerts (track articles, authors or keywords).

Resource URL: <http://0-online.sagepub.com.wam.seals.ac.za>

Author: Sage Publications, inc.

Subject: Economics

Subject: Science

Subject: Social Sciences

Subject: Humanities

Subject: Medicine (including Health, Nursing and Pharmacy)

Subject: Education

Subject: Psychology

Affiliation: RHODES

Access Information: Rhodes registered users.

Usage Statistics: Statistics: <http://online.sagepub.com/subscriptions/> (Click on the Account Manager tab)

Username: 2767093

Password: rhodesadmin

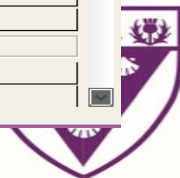
Public Note: Rhodes users link to SAGE

Tickler Log: Name: RU-DatabaseRenewal

Event Date: 20110319

e10000628

Edit Mode (OVR)



ERM Statistics - Configuration

- In order for the *analysis* function to work correctly:
 - Resource needs to be associated with an order record
 - *D Related Order* option
 - The order record should reflect the payment period of the subscription (*From* and *To* data)
 - Multiple related orders, e.g.:
 - Core subscription
 - “Top up” payments
 - SANLiC service fee



Browse Sage Local

e10000628

Resource Name SAGE Journals Online - SAGE Premier 2015 (Rhodes)

Resource Type E-Journals

Resource URL <http://0-online.sagepub.com.wam.seals.ac.za>

Description SAGE Publications publishes more than 500 peer reviewed full text journals in the areas of Communication Studies, Criminology, Education, Health Sciences, Management & Organization Studies, Materials Science, Political Science, Psychology, Sociology, and Urban Studies & Planning. The SAGE Journals Online platform supports enhanced search features (e.g. Fielded Boolean searches and CrossRef searches), Open URL linking, RSS feeds, and CiteTrack e-mail alerts (track articles, authors or keywords).

Summary

Record 110000215

Contacts

Financial

Statistics

Financial

Report options

Use date: Paid date Invoice date

Start date: 21-11-2015

End date: 21-11-2016



ERM Statistics – Preparing JR1

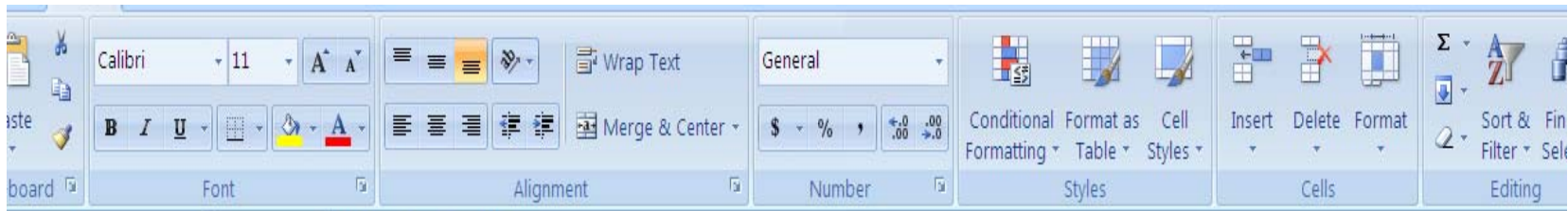
- SIERRA requires JR1 compliant file
- XML JR1 file needs to be prepared prior to uploading



ERM Statistics – Preparing JR1

- Download JR1 COUNTER Compliant statistics from vendor site
- Note:
 - SIERRA uses XML format, BUT
 - It is advised to rather download the CSV format
 - Due to variance in COUNTER revisions (R1, R2 etc.)
 - If CSV is not available, use EXCEL format and convert into CSV





A1 Journal Report 1 (R3)

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Journal Report 1 (R3)	Number of Successful Full-Text Article Requests by Month and Journal												
Roelien Clarke, Email: r.clarke@ru.ac.za													
Date run:													
11/8/2011													
	Publisher	Platform	Print ISSN	Online ISSN	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Sep-11
Total for all journals		HighWire Press			331	904	1773	964	1246	767	600	1402	1291
Accounting History SAGE Publi	SAGE Publi	HighWire F	1032-3732	1749-3374	0	1	0	0	0	0	0	0	0
Acta Sociologica Sub:	SAGE Publi	HighWire F	0001-6993	1502-3869	0	0	1	2	3	4	0	2	
Action Research Subs	SAGE Publi	HighWire F	1476-7503	1741-2617	0	11	1	0	2	0	0	9	
Active Learning in Higher f	SAGE Publi	HighWire F	1469-7874	1741-2625	0	6	1	3	8	5	3	8	
Adaptive Behavior Su	SAGE Publi	HighWire F	1059-7123	1741-2633	0	0	0	0	0	0	0	0	
Administration & Society<	SAGE Publi	HighWire F	0095-3997	1552-3039	0	2	0	1	1	1	2	3	
Adult Education Quarterly	SAGE Publi	HighWire F	0741-7136	1552-3047	0	0	1	0	2	0	1	0	
Advances in Dental Resea	SAGE Publi	HighWire F	0895-9374	1544-0737	0	0	0	0	0	0	0	0	
Advances in Developing H	SAGE Publi	HighWire F	1522-4223	1552-3055	0	1	1	0	5	2	16	6	



The screenshot shows the 'Save As' dialog box in Microsoft Excel 2010. The dialog is open over a spreadsheet titled 'SAGE.d'. The 'Save As' button is highlighted in yellow. The dialog lists several file formats: Excel Macro-Enabled Workbook, Excel Binary Workbook, Excel 97-2003 Workbook, Adobe PDF, OpenDocument Spreadsheet, PDF or XPS, and Other Formats. The 'Other Formats' option is also highlighted in yellow. The background spreadsheet shows a table with columns for months and rows for various journal titles.

	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Sep-11
Journal Report 1 (R)									
Roelien Clarke, Em									
Date run:									
11/8									
Total for all journal	331	0	0	0	0	0	0	0	0
Accounting History									
Acta Sociologica<B									
Action Research<B									
Active Learning in F									
Adaptive Behavior<									
Administration & S									
Adult Education Qu									
Advances in Dental									
Advances in Develop									
Advances in Develop									

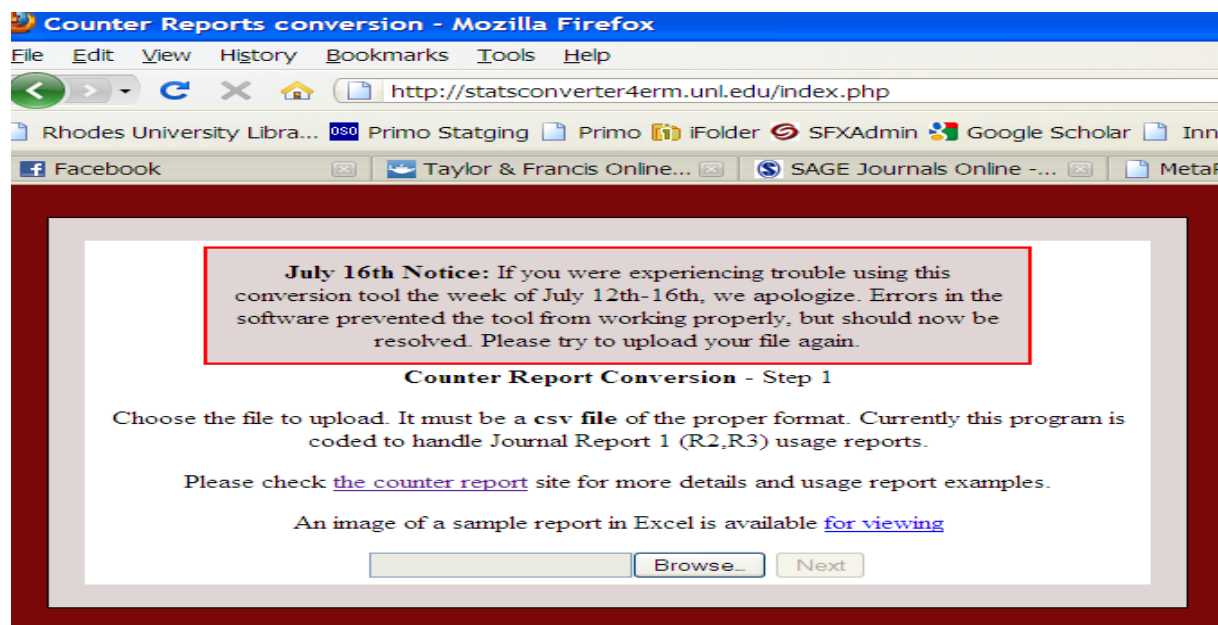


The image shows a Microsoft Excel spreadsheet with a 'Save As' dialog box open. The dialog box is titled 'Save As' and shows the current location as 'Stats'. The file name is 'SAGE.txt'. The 'Save as type' dropdown menu is open, showing the following options: Text (Tab delimited) (*.txt), Unicode Text (*.txt), XML Spreadsheet 2003 (*.xml), Microsoft Excel 5.0/95 Workbook (*.xls), CSV (Comma delimited) (*.csv), Formatted Text (Space delimited) (*.prn), and Text (Macintosh) (*.txt). The background spreadsheet shows a table with columns A and N, and rows containing text like 'Journal Report 1 (R)', 'Date run: 11/8', and 'Total for all journal Accounting History Acta Sociologica<B Action Research<B Active Learning in F Adaptive Behavior< Administration & S Adult Education Qu Advances in Dental Advances in Developing H'.



Prepare SIERRA specific XML file

- To create SIERRA specific XML file use **University of Nebraska's [Statsconverter](http://statsconverter4erm.unl.edu/index.php)**



The screenshot shows a Mozilla Firefox browser window titled "Counter Reports conversion - Mozilla Firefox". The address bar displays the URL "http://statsconverter4erm.unl.edu/index.php". The browser's menu bar includes "File", "Edit", "View", "History", "Bookmarks", "Tools", and "Help". The browser's toolbar shows navigation buttons (back, forward, home, stop, refresh) and several open tabs: "Rhodes University Libra...", "Primo Statging", "Primo iFolder", "SFXAdmin", "Google Scholar", and "Inn". The main content area of the browser is framed by a dark red border and contains the following text:

July 16th Notice: If you were experiencing trouble using this conversion tool the week of July 12th-16th, we apologize. Errors in the software prevented the tool from working properly, but should now be resolved. Please try to upload your file again.

Counter Report Conversion - Step 1

Choose the file to upload. It must be a **csv file** of the proper format. Currently this program is coded to handle Journal Report 1 (R2,R3) usage reports.

Please check [the counter report](#) site for more details and usage report examples.


An image of a sample report in Excel is available [for viewing](#)

At the bottom of the content area, there is a text input field, a "Browse..." button, and a "Next" button.



Prepare SIERRA specific XML file

- Upload CSV file, click on *Next*
- Download XML output file to PC



The screenshot shows a Mozilla Firefox browser window titled "Counter Reports conversion - Mozilla Firefox". The address bar displays the URL "http://statsconverter4erm.unl.edu/index.php". The browser's menu bar includes "File", "Edit", "View", "History", "Bookmarks", "Tools", and "Help". The toolbar contains navigation buttons (back, forward, home, stop, refresh) and several open tabs: "Rhodes University Libra...", "Primo Statging", "Primo", "IFolder", "SFXAdmin", "Google Scholar", and "Inno". The main content area features a dark red background with a white text box containing the following message:

Output file created and available for download at [SAGE.xml](#)

Right click to save the file. Please download right away, as you may not be able to return here, and the files are saved temporarily.

Please check the output against your original file, especially if you notice discrepancies in data fields. We have tried to code this for a lot of potential problems in exported data, but may not catch everything.

You may also [return to upload](#) another or the same file for conversion.



Prepare SIERRA specific XML file

- Verify validity of XML file using XML editors (e.g. Dreamweaver, XML Notepad etc.)
- **Note:**
 - Common problem:
 - DOCTYPE code entry listed on line 2 within XML structure
 - Remove line
- Save file in XML format



Prepare SIERRA specific XML file

```
C:\Users\library\Desktop\xml\ACM Digital Library JR1 2015.xml - Notepad++
File Edit Search View Encoding Language Settings Macro Run Plugins Window ?
ACM Digital Library JR1 2015.xml
1 <?xml version="1.0"?>
2 <reports>
3 <journal_report id="ACM_25025592015-01-01_to_2015-12-31" cop_version="4" cop_report="1">
4 <header>
5 <title>Number of Successful Full-text Article Requests by Month and Journal</title>
6 <timestamp>2016-11-11</timestamp>
7 <vendor>
8 <vend_name>ACM Digital Library</vend_name>
9 </vendor>
10 <customer>
11 <cust_name>Rhodes University - 2502559</cust_name>
12 </customer>
13 </header>
14 <journal_data>
15 <totals>
16 <requests start="2015-01-01" end="2015-01-31">55</requests>
17 <requests start="2015-02-01" end="2015-02-28">110</requests>
18 <requests start="2015-03-01" end="2015-03-31">399</requests>
19 <requests start="2015-04-01" end="2015-04-30">301</requests>
20 <requests start="2015-05-01" end="2015-05-31">371</requests>
21 <requests start="2015-06-01" end="2015-06-30">96</requests>
22 <requests start="2015-07-01" end="2015-07-31">104</requests>
23 <requests start="2015-08-01" end="2015-08-31">177</requests>
24 <requests start="2015-09-01" end="2015-09-30">67</requests>
25 <requests start="2015-10-01" end="2015-10-31">98</requests>
26 <requests start="2015-11-01" end="2015-11-30">89</requests>
27 <requests start="2015-12-01" end="2015-12-31">28</requests>
28 <requests start="2015-01-01" end="2015-12-31" type="ft_total">1895</requests>
29 <requests start="2015-01-01" end="2015-12-31" type="ft_html">157</requests>
30 <requests start="2015-01-01" end="2015-12-31" type="ft_pdf">1738</requests>
31 </totals>
32 <journal name="ACM Proceedings" print_issn="" online_issn="2168-4081">
```



ERM Statistics - Importing

- Two ways:
 - Manually importing (focus of this presentation)
 - SUSHI



ERM Statistics - Importing

- Manual Importing:
 - On Resource Record
 - Open *Statistics* tab
 - Note: Fields will be empty when configuring for first time
 - Using *Import* function on the *Usage Statistics* tab, find and load relevant XML file
 - A *Processing* bar indicates progress
 - File import is successful if date range is visible next to *Current Statistics* indicator



File Edit View Go Tools Reports Admin Help

sierra FUNCTION **Catalog ERM**

Browse Sage Local

e10000628

Resource Name SAGE Journals Online - SAGE Premier 2015 (Rhodes)
Resource Type E-Journals
Resource URL <http://0-online.sagepub.com.wam.seals.ac.za>
Description SAGE Publications publishes more than 500 peer reviewed full text journals in the areas of Communication Studies, Criminology, Education, Health Sciences, Management & Organization Studies, Materials Science, Political Science, Psychology, Sociology, and Urban Studies & Planning. The SAGE Journals Online platform supports enhanced search features (e.g. Fielded Boolean searches and CrossRef searches), Open URL linking, RSS feeds, and CiteTrack e-mail alerts (track articles, authors or keywords).

Summary

Record **I10000215**

Contacts

Financial

Statistics

Statistics

Import Statistics

Export Statistics

	Month	Year
From	<input type="text"/>	<input type="text"/>
To	<input type="text"/>	<input type="text"/>

Delete Statistics

	Month	Year
From	<input type="text"/>	<input type="text"/>
To	<input type="text"/>	<input type="text"/>



ERM Statistics - Importing

The screenshot displays the Sierra ERM interface. At the top, there is a menu bar with 'File', 'Edit', 'View', 'Go', 'Tools', 'Reports', 'Admin', and 'Help'. Below the menu is a search bar with 'y RESOURCE NAME' and 'Sage' entered, and a 'Search' button. The 'FUNCTION' dropdown is set to 'Catalog ERM'. The main content area shows details for resource 'e10000628', including the name 'SAGE Journals Online - SAGE Premier 2015 (Rhodes)', the URL 'http://0-online.sagepub.com.wam.seals.ac.za', and a description of the journal's focus. A left sidebar contains tabs for 'Summary', 'Contacts', 'Financial', and 'Statistics'. The 'Statistics' tab is active, showing an 'Import Statistics' dialog box. This dialog box has a file list with 'SAGE.xml' selected, a 'File Name' field containing 'SAGE.xml', and a 'Files of Type' dropdown set to 'All Files'. There are 'Open' and 'Cancel' buttons at the bottom of the dialog. To the right of the dialog, there are fields for 'Month' and 'Year' with 'From' and 'To' labels, and a 'Delete' button. The status bar at the bottom reads 'Rhodes University / Department / Unit / Document / Date'.



ERM Statistics - Importing

Summary

Contacts

Financial

Statistics

Statistics

Import Statistics

Import

Export Statistics

Month	Year
From Jan	2011
To Dec	2012

Export

Delete Statistics

Month	Year
From	
To	

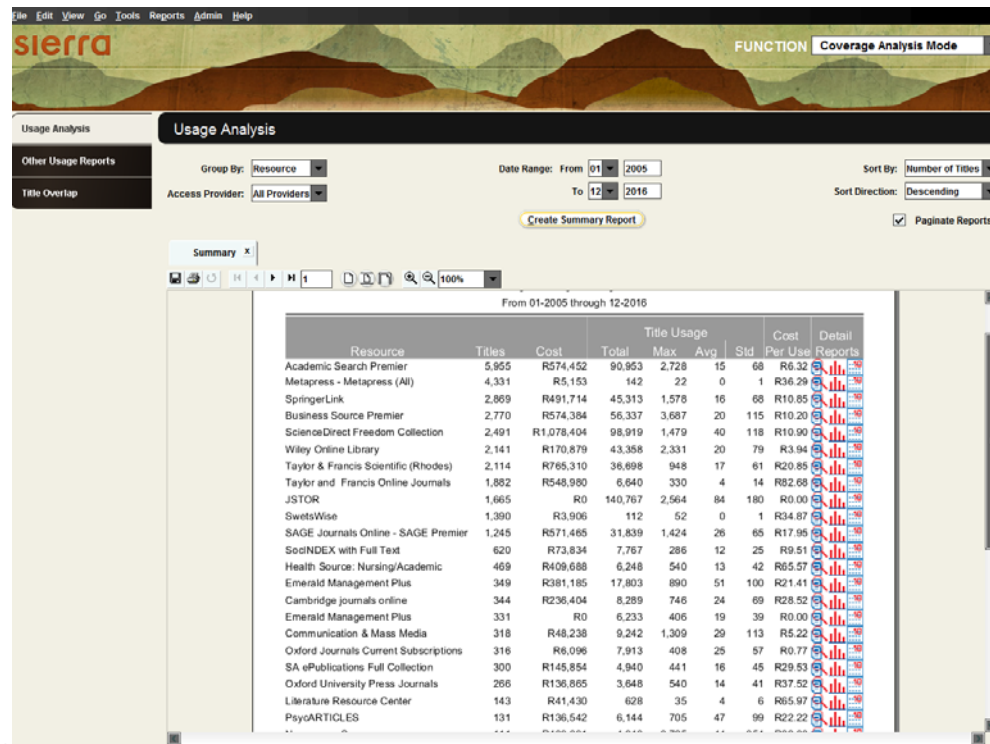
Delete

Current statistics: -01-2011 to -12-2015



ERM Statistics - Analysis

- *Coverage Analysis* used for various report



Additional Reading

- COUNTER “About COUNTER”, Project COUNTER, available at <http://www.projectcounter.org>
- COUNTER “Release 3 of the COUNTER Code of Practice for Journals and Databases”, Project COUNTER, available at http://www.projectcounter.org/code_practice.html
- ICOLC (1998) “Guidelines for statistical measures of usage of Web-based indexed, abstracted, and full text resources”, International Coalition of Library Consortia, available at: <http://www.library.yale.edu/consortia/esbstats.html>
- NISO (2010) “SUSHI server registry” National Information Standards Organisation, available at” <http://sites.google.com/site/sushiserverregistry>



Special note of thanks

- **Vaal University of Technology (VUT)** for their generous assistance in creating this opportunity for me to attend.
- **Kholiswa Yona (RU)** for reworking the manual and updating it from the Millennium version to the SIERRA version.

