

# 2021-01-19 eUsage Reports Meeting Notes

## Date

19 Jan 2021

## Attendees

## Discussion items

Item	Lead	Notes
Questions and comments on Jira stories	<a href="#">Kristen Wilson</a>	<p><a href="https://issues.folio.org/secure/RapidBoard.jsps?projectKey=UXPROD&amp;rapidView=190&amp;view=planning">https://issues.folio.org/secure/RapidBoard.jsps?projectKey=UXPROD&amp;rapidView=190&amp;view=planning</a></p> <p>No questions or comments yet.</p> <p>Things worth taking a look at:</p> <ul style="list-style-type: none"><li>• UXP-2861 flow chart on data</li><li>• UXP-2860 mockups for frontend, e.g. harvest results</li></ul> <p>Dev team on Index Data side has begun meeting, they'll be working on refinement of the issues. Will start with backend work.</p> <p><b>Development team (Index Data):</b></p> <ul style="list-style-type: none"><li>• <a href="#">Jakub Skoczen</a> (Technical Lead)</li><li>• <a href="#">Adam Dickmeiss</a> (Backend)</li><li>• <a href="#">Mike Taylor</a> (Frontend)</li></ul>
Identifying usage reports	<a href="#">Kristen Wilson</a>	<p>We need to create a list of desired usage reports/visualizations. From this list, we need to choose five reports as deliverables for this project.</p>

<p>Nicole Hügel</p>	<p>Suggestions SLUB:</p> <p>(1) <b>Cost per download/search per agreement</b> (=&gt; TR_J1; TR_B1; DR_D1)* + also relevant for UBL</p> <p>(2) <b>Searches/Download price development per agreement over several (last 5) years</b> (=&gt; TR_J1; TR_B1; DR_D1)* + also relevant for UBL * ... Counter Reports (Counter_5), used in the SLUB</p> <p>1&amp;2 are very similar, difference: 1 for the current year, 2 for the development over some year</p> <p>(3) <b>Comparison of the use/download of the current year vs. archive years for/by the last ten publishing years</b> (TR_J4)* + also relevant for UBL</p> <p>Question: frontfile &amp; backfile may be purchased separately and then may be handled by different agreements.</p> <p>Axel: Statistics server only used JR 5 (R4) for cost per use statistics, difficult to decide. National licenses in Germany often cover backfiles with moving walls (they don't have to be paid by the institution), those backfiles should not be considered in cost per use statistics.</p> <p>Nicole Hügel: Sometimes the titles are still included in the agreement and have to be paid for nonetheless</p> <p>Helge: Matter of perspective: Interested in agreement/what you pay for it vs. Interested in specific title, as it appears across multiple agreements/vendors</p> <p>Jessica: Also consider Open Access usage, use J3 reports</p> <p>(4) <b>Downloads (total item requests) by month ; downloads (unique item requests) by month ; searches by month</b> (=&gt; TR_J1; TR_B1; DR_D1)* + also relevant for UBL</p> <p>Nicole Hügel: Which metric should be used, unique or total item requests? SLUB and Leipzig use total item requests and the moment, to be able to compare to Counter 4.</p> <p>Helge: Ideally, both should be available and the user should be able to choose.</p> <p>Kristen: There can be a difference between download and visualization of reports. Download can be much richer, for different use-cases.</p> <p>(5) <b>Percentage of titles without usage in an agreement, dispersion of usage over all titles (with several limiting values); configurable</b> + also relevant for UBL</p> <p>Kristen: Question about differences between resource types, there are different reports for ebooks, journals, data bases - are there agreements that have mixed resource types?</p> <p>Helge: Where do the holding information come from? One or several lists?</p> <p>Kristen: Current plan is agreement lines. Take a look at Folio at the end of the call.</p>
<p>Martin Bauschmann</p>	<p>Suggestions UBL:</p> <p>Please see above +</p> <p>(6) <b>Cumulative access per journal/title and time in an agreement</b> (=&gt; TR_J1; TR_B1; DR_D1)</p> <p>Martin: Should be covered by other reports above.</p> <p>(7) Special cases, f.e.: Nature journals: one agreement, but the individual journals still have prices and can be canceled and ordered, unlike many other packages. <b>So in this case a report, that shows the costs / benefits per agreement and per title</b> would be useful.</p>

		<p>Kristen: We should be able to cover all of those reports, as they seem to rely on similar data. Are there other requirements</p> <p>Jessica: IR-M1 (?) streaming video usage would be helpful as well.</p> <p>Helge: Relys on two sets of data: Holdings contained in agreement and usage data. It might be necessary to include external data (what school has paid for it, ...). Data might be contained in Folio.</p> <p>Kristen: We have connectzion between agreement line and POL, so order might e source. Are there other places in Folio with data that should be accessed?</p> <p>Helge: Is it possible to add tags to an individual journal?</p> <p>Axel: Is eholdings app scope of project? Eholdings data is hard to extract (problem for LDP as well).</p> <p>Kristen: We will definetely supooort the internal KB (at the moment GOKB), and try to make this available for all knowledge bases, but it might be a question of capacity for eholdings at some point. EBSCO is also working at an integration of their usage consolidation service to Folio at the moment.</p> <p>Potential new backend module could be able to provide data to the LDP.</p>
FOLIO Tour	Kristen Wilson	<p><b>Agreements app</b></p> <p><b>Agreement lines</b> show the content covered by the agreement. They link to resources from a knowledge base, theses can be packages or single titles.</p> <ul style="list-style-type: none"> <li>• Kristen: The agreement lines might be a mix of resource types, a question will be how to handle that in reporting</li> </ul> <p>Link from Agreement line to <b>Purchase order line</b></p> <p>Click on a title opens the <b>title view</b>, a title might be part of none, one or several agreements. Information on different ways to purchase the title</p> <ul style="list-style-type: none"> <li>• Kristen: In this view we might display usage data on title level, agreement independent.</li> </ul> <p>Agreements app: <b>Usage data accordion</b> &gt; <b>link to eUsage app</b>, where harvesting can be configured and reporst an be downloaded.</p> <ul style="list-style-type: none"> <li>• Kristen: Connection between agreement and usage data provider makes sure to pull in the right data from the correct platform/vendor when reporting from agreement perspective</li> </ul> <p>The usage data accordion (or an additional one) will be the place to view statics and visualizations from the agreement record</p>
Next steps	Kristen Wilson	<p>We will start prototyping reports and visualizations.</p> <p>Maybe next week a first report prototype will be ready to talk through.</p>