Welcome to the webinar about CC-PLUS!

- All participants are muted upon entry.
- Please use the chat to raise questions or comments throughout the webinar.
- We will be encouraging discussion later on in the webinar.
- This webinar is being recorded and will be distributed via the ICOLC list.
Consortia Collaborating on a Platform for Library Usage Statistics

Gretchen Gueguen, PALCI Digital Projects Manager
Jill Morris, PALCI Executive Director
Anne Osterman, VIVA Director

November 20, 2020
Background

- We collectively spend millions on licensed eResources.
- Usage data are critical to understanding value and use of eResources.
- COUNTER provides standardized reports.
- Consortia (and libraries) struggle to gather and analyze usage data across multiple platforms.
- 2014 survey of 45 consortia worldwide demonstrated shared need and willingness to collaborate.
CC-PLUS Goals

This project will result in an open source, shareable platform that will:

1. Increase libraries’ and consortial analytical capacities;
2. Create staffing and cost efficiencies;
3. Empower consortia and libraries to make informed decisions about their investments.
IMLS-funded Initiative

2017 PALCI and partners received $50k from IMLS’s National Leadership Grant for Libraries to build a prototype system for harvesting, ingesting, validating, storing, displaying and analyzing usage data. Focused on COUNTER 4 Reports.

2018-20 PALCI and consortial partners received $247,500 to build a production-ready open source software aimed at gathering library usage statistics that would scale to support consortia.
CC-PLUS Advisory Board & Project Team

Jill Morris – PALCI, Project Director
Gretchen Gueguen – PALCI, Project Coordinator
Anne Osterman – VIVA, Project Communications Lead
Scott Ross – Application Developer
Sarah Dooley - UX Developer
Ivy Anderson & Nga Ong – California Digital Library
Lorraine Estelle - COUNTER
Pam Jones – ConnectNY
Tejs Grevstad – ConsortiaManager
Thomas Porquet & Thomas Jouneau – Couperin (France)
Jason Friedman – CRKN (Canada)
John Stephens – GALILEO
Jo Lambert – Jisc (UK)
Joanna Voss – OhioLINK
Chuck Thomas, Randy Lowe, & Erica Owusu – USMAI
Jason Price – SCELC
Product Management Team

- Gretchen Gueguen – PALCI, Project Coordinator; Co-chair
- Scott Ross – Application Developer
- Nga Ong – CDL
- Sarah Probst – ConnectNY; Co-chair
- Thomas Porquet – Couperin
- Émilie Lavallée-Funston – CRKN
- Ken Henslee – GALILEO
- Paul Meehan – Jisc
- Joanna Voss – OhioLINK
- Jason Price – SCELC
- Erica Owusu – USMAI
- Bobby Reeves – VIVA
What is CC-PLUS?

- Web-based
- Harvets COUNTER R5 reports via SUSHI protocol
- Database to combine multiple reports from multiple providers and institutions
- Create customized report outputs
CC-PLUS ... not just for consortia

- Designed for consortia, but includes multiple levels of user access
- Allows collaborative management
- Can be used by single institutions
**JSTOR**

**Details**

- **Name**: JSTOR
- **Status**: Active
- **Serves**: Entire Consortium
- **SUSHI service URL**: https://www.jstor.org/sushi/reports/
- **Run harvests monthly on day**: 16
- **Reports to harvest**: TR DR PR IR

**Recent Harvest Activity**

**Institutional Sushi Settings**

- **ADD NEW INSTITUTION**

**Connect an Institution**

<table>
<thead>
<tr>
<th>Name</th>
<th>Customer ID</th>
<th>Requestor ID</th>
<th>API Key</th>
<th>Actions</th>
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<td>abcdefghij</td>
<td>a1b2c3d4e5f6g7</td>
<td>DELETE CONNECTION</td>
</tr>
<tr>
<td>Sci-Tech University</td>
<td>123456789</td>
<td>abcdefghij</td>
<td>a1b2c3d4e5f6g7</td>
<td>DELETE CONNECTION</td>
</tr>
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**Settings & Harvests**
<table>
<thead>
<tr>
<th>Last Update</th>
<th>Institution</th>
<th>Provider</th>
<th>Report</th>
<th>Usage Date</th>
<th>Attempts</th>
<th>Status</th>
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<tbody>
<tr>
<td>2020-10-16</td>
<td>Smalltown Community College</td>
<td>Taylor &amp; Francis</td>
<td>IR</td>
<td>2020-09</td>
<td>1</td>
<td>Success</td>
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<td>PR</td>
<td>2020-09</td>
<td>1</td>
<td>Success</td>
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# Harvest Details

<table>
<thead>
<tr>
<th>Institution</th>
<th>State University</th>
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<tbody>
<tr>
<td>Provider</td>
<td>Springer Nature</td>
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<tr>
<td>Report</td>
<td>PR</td>
</tr>
<tr>
<td>Usage Month</td>
<td>2020-08</td>
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<td>Attempts</td>
<td>4</td>
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<tr>
<td>Status</td>
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<tr>
<td>Raw Data</td>
<td>[DOWNLOAD]</td>
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## Failed Attempts

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<tr>
<th>Attempted</th>
<th>Process Step</th>
<th>Error Code</th>
<th>Severity</th>
<th>Message</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020-09-15T08:27:00.000000Z</td>
<td>HTTP</td>
<td>10</td>
<td>Fatal</td>
<td>SUSHI HTTP request failed, verify URL</td>
<td>(404) Not Found</td>
</tr>
<tr>
<td>2020-09-16T04:00:40.000000Z</td>
<td>HTTP</td>
<td>10</td>
<td>Fatal</td>
<td>SUSHI HTTP request failed, verify URL</td>
<td>(404) Not Found</td>
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<td>HTTP</td>
<td>10</td>
<td>Fatal</td>
<td>SUSHI HTTP request failed, verify URL</td>
<td>(404) Not Found</td>
</tr>
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</table>
State University

Details

Name: State University
Type: Doctoral Universities: Moderate Research Activity
Status: Active
FTE: 5153
Groups: Group Three

Users

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<tr>
<th>Name</th>
<th>Permission Level</th>
<th>Last Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gretchen Manager</td>
<td>Manager</td>
<td>2020-08-26 16:15:03</td>
</tr>
<tr>
<td>New Manager</td>
<td>Manager</td>
<td>2020-11-11 14:56:15</td>
</tr>
</tbody>
</table>

Recent Harvest Activity

Providers

Export settings to: xls  xlsx

Connect a Provider
Pilot Phase: May - October 2020

- 3 North American consortia with 5 individual library participants
- 3 European consortia
- Centrally hosted instance with partitions for each
- 2 cycles of piloting with new features released in second cycle
- Feedback surveys and bug reporting
- Goals:
  - Does the basic functionality work?
  - What issues are encountered in hosting?
  - What reports are most accessed (for development of future viewing/shortcuts)?
  - What features should be developed in a future phase?
Pilot Outcomes

- Validation of core function and crucial bugs found and fixed
- UX feedback
- Help and documentation needs specified
- Not a test at scale
- Numerous difficulties arise from vendor inconsistency
Second Pilot: Spring 2021

- Significant UX improvement
- Small group of 5-8 users
- Pilot group will work together on some shared research problems
- Emphasis will be on documenting and creating standard practices
- Goals:
  - Start to build user community infrastructure and support
  - Begin to create structures for consistent feedback to vendors
  - Identify areas where system can be improved for scale and interoperability
  - Test local user installation “in the wild”
Potential Future Development

- Visualization of heavily used metrics
- A web-hosted version for quick report generation without long-term data storage
- Integrating data from external sources
- Incorporating non-COUNTER R5 data
- An API to make data within the CC-PLUS database available to other services
Grant Funding Status

- A requested extension to the current grant was accepted, and the new end period is June 2021. This allows time for additional prioritized development and improvements as well as the second pilot planned for Spring 2021.

- CC-PLUS has applied for a third round of IMLS National Leadership Grant funding for this project, led by SCELC. If invited to submit a full proposal, there will be a March 31st deadline.
Taking Stock

- We are at a deeply exciting moment for CC-PLUS, as it is time for broad release of the code and an operational pilot.
- Partnerships among consortia and with external organizations have been critical to the success of CC-PLUS.
- There is a great opportunity for efficiencies in collaborative identification of problems with usage statistics providers.
- Active code development and a sustainable governance structure are deeply important to this program’s long-term success.
Questions?

Ask us!

Gretchen Gueguen, PALCI Digital Projects Manager
gretchen@palci.org

https://www.cc-plus.org