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.

Project Update

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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.

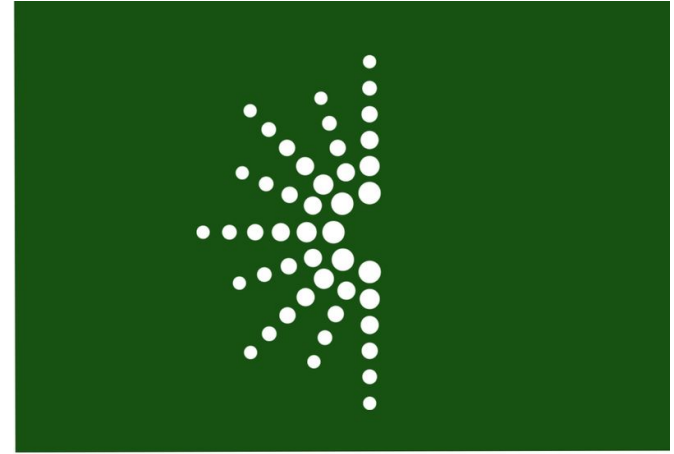CC-PLUS

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.

PROUD #IMLSGRANT RECIPIENT!

THE INSTITUTE OF MUSEUM AND LIBRARY SERVICES

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

- Harvests COUNTER R5 reports via SUSHI protocol

- Database to combine multiple reports from multiple providers and institutions

- Create customized report outputs

CC-PLUS

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

DEMO

JSTOR

Details   EDIT

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 ▾

Name	Customer ID	Requestor ID	API Key		
Liberal Arts College	123456789	abcdefghij	a1b2c3d4e5f6g7	DELETE CONNECTION	SETTINGS & HARVESTS
Sci-Tech University	123456789	abcdefghij	a1b2c3d4e5f6g7	DELETE CONNECTION	SETTINGS & HARVESTS

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Feedback

Harvest Logs

From   To

Institution(s) ⌄   Provider(s) ⌄   Report(s) ⌄   Status(es) ⌄

Last Update	Institution	Provider	Report	Usage Date	Attempts	Status	
2020-10-16	Smalltown Community College	Taylor & Francis	IR	2020-09	1	Success	DETAILS
2020-10-16	Liberal Arts College	JSTOR	IR	2020-09	1	Success	DETAILS
2020-10-16	Liberal Arts College	JSTOR	PR	2020-09	1	Success	DETAILS
2020-10-16	Liberal Arts College	JSTOR	DR	2020-09	1	Success	DETAILS
2020-10-16	Liberal Arts College	JSTOR	TR	2020-09	1	Success	DETAILS
2020-10-16	Sci-Tech University	JSTOR	IR	2020-09	1	Success	DETAILS
2020-10-16	Sci-Tech University	JSTOR	PR	2020-09	1	Success	DETAILS
2020-10-16	Sci-Tech University	JSTOR	DR	2020-09	1	Success	DETAILS
2020-10-16	Sci-Tech University	JSTOR	TR	2020-09	1	Success	DETAILS
2020-10-16	Smalltown Community College	Taylor & Francis	PR	2020-09	1	Success	DETAILS

Feedback

Harvest Details

Institution	State University
Provider	Springer Nature
Report	PR
Usage Month	2020-08
Attempts	4
Status	Success
Raw Data	**DOWNLOAD**

Failed Attempts

Attempted	Process Step	Error Code	Severity	Message	Details
2020-09-15T08:27:00.000000Z	HTTP	10	Fatal	SUSHI HTTP request failed, verify URL	(404) Not Found
2020-09-16T04:00:40.000000Z	HTTP	10	Fatal	SUSHI HTTP request failed, verify URL	(404) Not Found
2020-09-17T04:00:43.000000Z	HTTP	10	Fatal	SUSHI HTTP request failed, verify URL	(404) Not Found

Feedback

Filters ∧

Provider
✕ American Chemical Society, Edinburgh University Press ▾

Institution
✕ Smalltown Community College, Sci-Tech University, Liberal Arts College ▾

| Data Type ▾ | Section Type ▾ | Access Type ▾ | Access Method ▾ | YOP from | YOP to |

REFRESH PREVIEW   **SAVE CONFIGURATION**   **EXPORT**

Create a new saved configuration

| Name |

OR

Overwrite an existing saved configuration

| Saved Report ▾ |

SAVE   **CANCEL**

Title	Provider	Institution	Data Type	Section Type	Access Type	Access Method	Pub.Year	Total Item Investigations - Sep_2020	Total Item Requests - Sep_2020	Unique Item Investigations - Sep_2020	Unique Item Requests - Sep_2020	Unique Title Investigations - Sep_2020	Unique Title Requests - Sep_2020	Limit Exceeded - Sep_2020
Accessibility in the Laboratory	American Chemical Society	Sci-Tech University	Book		Controlled	Regular		0	0	0	0	1	1	0
Accessibility in the Laboratory	American Chemical Society	Sci-Tech University	Book	Chapter	Controlled	Regular		1	1	1	1	0	0	0
Accounts of Chemical Research	American Chemical Society	Sci-Tech University	Journal	Article	Controlled	Regular		916	745	583	537	0	0	0
Accounts of Chemical	American Chemical	Sci-Tech	Journal	Article	OA_Gold	Regular		80	60	51	44	0	0	0

Feedback

State University

Details

[EDIT]   [IMPORT SETTINGS]

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

Users   [ADD USER]

Name	Permission Level	Last Login
Gretchen Manager	Manager	2020-08-26 16:15:03
New Manager	Manager	2020-11-11 14:56:15

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Feedback

Recent Harvest Activity   ⌄

Providers

Export settings to: .xls   .xlsx

Connect a Provider   ▾

Name	Customer ID	Requestor ID	API Key

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

CC-PLUS

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!

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https://www.cc-plus.org