

COUNTER Code of Practice

Foreword

Librarians spend considerable amounts of money licensing different types of online content and want to measure return on the investment and to ensure that library budgets are spent as productively as possible. One of the ways to measure this return on investment is to assess usage statistics.

This release of the COUNTER Code of Practice is designed to balance changing reporting needs with the need to make things simpler so that all content providers can achieve compliance and librarians can have usage statistics that are credible, consistent and comparable.

Consistency in report formats

Release 5 consists of four Master Reports. Each of the Master Reports is associated with several pre-set filtered Standard Views, but can also be examined from different viewpoints to suit the needs of the person working with the report. Librarians will be able to use Master Report to customize their analysis to meet their specific reporting need.

Consistency and clarity in metrics

Release 5 also introduces a new Metric Types which ensure flexibility and depth of reporting.

Flexibility

Flexibility is built into Release 5 with the introduction of attributes, pieces of information which can be associated with multiple metrics. Providing information about matters such as year of publication, access type, and data types means that users can roll up or drill down through reports with ease, eliminating the need for special purpose reports.

How do I use this Code of Practice?

The Code of Practice is available to view on this website <https://www.projectcounter.org/> as an interactive code. This online version is the version of record for Release 5 of the Code of Practice.

- You can download each of the sections in the Code of Practice.
- In the navigation bar immediately below Search, clicking on Glossary, will provide a pop-up window with terms and definitions.
- You can click the + or – key to increase or decrease the font size in the Code of Practice.

You may also download a [PDF](#) of the entire Code of Practice document, published in July 2017 and its associated appendices.

The Code of Practice will be of interest to both content providers and librarians, however some sections are more relevant to particular user cases.

Sections 1 and 2 provide an introduction and outline of the scope of the COUNTER Code of Practice.

Sections 3 and 4 provide an explanation of the Master Reports and Standard Views which are a requirement for COUNTER-compliance and that allow the librarian to filter and configure to create customized “views” of their usage data. Section 3 also explains Metric Types and Attributes.

Content Providers implementing Release 5

Sections 5 to 7 provide essential information. These sections give detail on the delivery of COUNTER-compliant reports and views, logging usage and processing rules. You will also want to refer to the [Friendly Guide To Release 5 Technical Notes for Providers](#)

COUNTER compliance requires content hosts to implement COUNTER_SUSHI (the standardised model for harvesting online usage data). [Section 8](#) provides the specifications for the RESTful COUNTER_SUSHI API and the methods that must be supported. [Appendix F](#) explains handling errors and exceptions.

Content Providers preparing for COUNTER audit

An important feature of the COUNTER Code of Practice is that compliant content providers must be independently audited on a regular basis in order to maintain their COUNTER compliant status. If you are preparing for a COUNTER audit, [Section 9](#) explains the audit process and procedures. [Appendix E](#) explains audit requirements and tests.

COUNTER would like to acknowledge the support of [UKSG](#) in the publication of the Code of Practice Release 5.