

E-PIC User Guide

Elsevier – Product Insights for Customers

e-pic.elsevier.com



INTRODUCTION

COUNTER (COP5) REPORTS

COUNTER COP5 reports have moved from the AdminTool to E-PIC. COUNTER COP4 reports were retired on 2nd April 2022.

WHY USE E-PIC?

Beyond COUNTER reports, **E-PIC offers customers a free and unique view of your institution's engagement** with Elseviers expanding set of research content and tools.

It is meant for librarians, research leaders, and professionals who recognize the role of great content and tools in a successful research strategy. E-PIC is designed to support our customers making key decisions as they evaluate and improve research outcomes. It is the result of Elsevier's enduring focus on customer value and transparency.

Understanding the usage of tools and content, exploring gaps in your portfolio, gaining information to promote adoption of tools, and finding out where your institution is trending.

ADMIN TOOL

The AdminTool will remain the application for account administration - empowering you to manage user privileges and access to Elsevier products. [Admin Tool Login Page \(elsevier.com\)](#)

FEATURES

CHARTS AND GRAPHS

As with most charts, switching between a graphical and tabular view is possible.

EXPORT

With the 'Export' feature pick the insights in your format of choice to use in your reports and presentations.

SIGNING IN

E-PIC can be accessed by administrative account holders using Elsevier credentials. As an administrator you can also provide others within your organisation with E-PIC access via the Admin Tool. **[e-pic.elsevier.com](#)**

NEED HELP



Find a question mark throughout E-PIC and click on it to get help, alternatively contact support [service.elsevier.com/app/contact/supporthub/E-PIC](#)



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COUNTER (COP5) Reports

Overview

Usage reporting as per COUNTER Code of Practice, Release 5 standards. Supplementary reports are customised reports using the COUNTER extensions. **FAQ's- elsevier.com/librarians/usage-reports/cop5-faqs**

Data update period: Monthly

COUNTER compliant: Yes

Audience

- Librarians
- Research leaders
- Corporate customers

Why is this important

This allows your institution to compare data received from Elsevier, and to understand and demonstrate the value of these electronic resources to which you subscribe.

How to use

The COUNTER (COP5) Reports widget delivers the usage reports as per the standards of the COUNTER Code of Practice, Release 5. Low COUNTER's Fifth will pass the baton to librarians.

The Code of Practice enables publishers and vendors to produce consistent and credible usage data.

For more details about the supplementary reports, please refer to www.elsevier.com/librarians/usage-reports

USAGE REPORTS - LIBRARIANS | ELSEVIER

Title reports

- TR Title Master Report
- TR_J1 – Journal Requests (Excluding OA_Gold)
- TR_J2 – Journal Access Denied
- TR_J3 – Journal Usage by Access Type
- TR_J4 – Journal Requests by YOP (Excluding OA_Gold)
- TR_B1 – Book Requests (Excluding OA_Gold)
- TR_B2 – Book Access Denied
- TR_B3 – Book Usage by Access Type

Platform reports

- PR – Platform Master Report
- PR_P1 – Platform Usage

Database report

- DR – Database Master Report
- DR_D1 – Database Search and Item Usage

News

- How COUNTER's Fifth will pass the baton to librarians
www.elsevier.com/connect/library-connect/how-counters-fifth-will-pass-the-baton-to-librarians
- COUNTER (COP5) Reports Frequently Asked Questions
www.elsevier.com/librarians/usage-reports/cop5-faqs



ScienceDirect usage

Overview

This widget is for librarians who make decisions about journal collection development and renewal of their ScienceDirect license. It shows the usage trends on ScienceDirect and related platforms. Discover usage of content at your institution by source, publication, and access type. For Journals, Books and APIs extensions. The COUNTER compliant usage information is updated within the first two weeks of each month.

Data update period: Monthly

COUNTER compliant: Yes

Audience

- Librarians
- Research leaders
- Corporate customers

Why is this important

It shows the usage trends on ScienceDirect and related platforms. Use this information to understand the value of ScienceDirect and showcase it to your institution.

How to use

METRICS USED

The default view is usage of all content types on ScienceDirect and related platform including 'distributed usage login' (DUL). This allows publishers to capture traditional usage activity related to their content that happens on sites other than their own, so they can provide reports of "total usage" regardless of where that usage happens.



Journals

The total number of COUNTER compliant downloads of the following article types, through the following access methods.

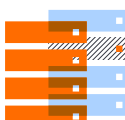
- **Item request:** number of items requested by users as a result of a user request, action or search. User requests include viewing, downloading, emailing and printing of items where this activity can be recorded and controlled by the server rather than the browser.
- **Investigations:** number of times a content item or information related to a content item was accessed. Double-click filters are applied to these transactions. Examples of investigations are requests for full-text, turnaways, abstract use and usage of multimedia files that are part of an article or chapter.
- **By access – controlled:** access would only be available to users covered by the library's license to the content.
- **By access - gold open access:** access, immediately upon publication and at no charge to the user (but usually supported financially by the author or the author's funding agency), of peer-reviewed, full-text articles that have been accepted for publication in a journal.



Books

All books usage takes place through ScienceDirect.com. Total usage (default) can be broken down into the following content types:

- **Book series:** a comprehensive snapshot of the current state of research
- **Reference works:** a one-stop resource for anyone needing to quickly acquaint themselves with a new field.
- **Handbooks:** authoritative information on a mature field or a technique.
- **E-Books:** explore unfamiliar subject matter



APIs

See the following page for more information regarding text mining. Text and Datamining is reflected in the COUNTER Title Master report (TR) under the access_method TDM.

Scopus usage

Overview

The Scopus usage widget is for administrators and librarians who would like to understand how users within their institution are using Scopus. For example, to find peer reviewed literature, understand what is happening in their field, inform publishing decisions. Trend overview of Scopus usage for the past 5 years, displayed overall usage of searches, literature discovery activities and infometrics use activity

Data update period: Monthly

COUNTER compliant: N/A

Audience

- Librarians
- Research leaders
- Corporate customers

Why is this important

Understand how your users are interacting with the Scopus platform. This information can help inform your liaison librarians on what areas need further training ie. refining keyword searches. You can also view a percentage break down of what subjects are searched, this will inform you of the schools to target with training.

How to use

TIP: As a Scopus subscriber, you can also use the widget 'Journal value beyond downloads' which lets you compare 20,000+ journals based on your organization's real usage.



Overview

This widget provides a quick view on the key metrics for Scopus and shows data for the current year to date and the full last 3 years.

METRICS USED

- Searches is the same as the metric searches_regular in the DR Counter report.
- Literature Discovery Activities is the sum of Document Record Views and Outward Links to Documents. The breakdown of this metric can be found into Literature discovery.
- Infometric Use Activities is an aggregate number for the use of Scopus analytical tools. A breakdown of this metric can be found into Analytical Usage.



Analytical Usage

This widget gives information about the use of the Scopus research performance measurement tools such as author and affiliation profile views, citation overview requests and exports, and analyser views. The report covers the current year to date and the full last 4 years.

METRICS USED

- Affiliation Profile Views counts the use of Affiliation profile pages.
- Profile Views counts the use of Author profile pages.
- Analyze Author Output Views counts the Analyze Author Output page views. Each switching to a different tab within that page is included in the count.
- Citation Overview Requests counts the Citation Overview page views. Each update of the overview is included in the count.
- Citation Overview Exports counts export actions from the Citation Overview page.
- Evaluate journals counts the use of the Scopus Journal Analyzer. Each addition of journal or change of tab is included in the count.
- Publication Metrics Views counts views of the Metrics detail page for an article. Each switching to a different tab within that page is included in the count.
- Results Analyzer Views counts the use of the Scopus Results Analyzer. Each addition of result or change of tab is included in the count.
- Cited-By Clicks counts the number of times Cited-By searches have been run



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Search

This widget gives a breakdown of searches by type, which will give an indication of the type of tasks users are performing.

METRICS USED

- Searches for documents counts all on-platform searches for documents run via either typing and submitting a search query or clicking on a link that triggers a search (e.g. the number of citations of a given article).
- Searches for authors counts all on-platform searches for authors run via either typing and submitting a search query or clicking on a link that triggers a search (e.g. the number of authors of a given institution or affiliation).
- Searches for affiliations counts all on-platform searches for affiliations run via either typing and submitting a search query or clicking on a link that triggers a search.
- Searches for sources counts all on-platform searches for sources run via either typing and submitting a search query or clicking on a link that triggers a search.
- Searches for citing documents counts all on-platform searches for documents that cite a given document.
- Searches for referred documents counts all on-platform searches for documents referred by a given document.
- Searches for related documents counts all on-platform searches for documents that relate to a given document.
- Searches from external origin counts all searches from external search forms that have been submitted to Scopus and generate a results list (e.g. federated searches).



Search Results

This widget gives a breakdown of search results lists by type. Data are reported for the current year to date and the full last 4 years.

METRICS USED

- Document Result Lists counts the number of search result lists that show document results.
- Author Result Lists counts the number of results lists that show author results.
- Affiliation Result Lists counts the number of results lists that show affiliation results.
- Source Result Lists counts the number of results lists that show source results.

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Document Views

This report gives a breakdown of record views originating from different types of search result lists. Data are reported for the current year to date and the full last 4 years.

METRICS USED

- Record Views from Document Result Lists counts the number of document records that have been viewed via clicking on a result from a Document Result List.
- Record Views from Author Result Lists counts the number of author records that have been viewed via clicking on a result from an Author Result List.
- Record Views from Affiliation Result Lists counts the number of affiliation records that have been viewed via clicking on a result from an Affiliation Result List.
- Record Views from Source Result Lists counts the number of source records that have been viewed via clicking on a result from a Source Result List.



Literature Discovery

This widget shows usage of Document Record Views and the Outward Links to Documents at publisher sites per month for the current year to date and the full last 4 years. Scopus offers different types of linking, such as view at publisher links, link resolver links, view on web links, direct full-text links, interlibrary/document delivery links and documents via download manager.

METRICS USED

- Document Record Views is counts the number of full document record views (excluding abstract previews on results lists).
- View at Publisher Links counts the use of links to full-text documents published in any title covered by CrossRef and to articles in ca. 800 additional titles that are not or only partly covered by CrossRef.
- Link Resolver Links counts the use of links to documents via the library's link resolver, e.g., LinkFinderPlus, SFX, SIRSI Resolver, etc.
- View on Web Links counts the use of links to documents on the web.
- Direct Full-Text Links counts the use of links to full-text documents to e.g. local repositories or on-site hosting platforms. The link and text on the button are fully customizable by the customer; the button may display wording like "Full Text".
- Interlibrary/Document Delivery Links counts use of links to a document delivery form, such as "Order Document", "Interlibrary Loan", "British Library Direct", etc.
- Documents via Download Manager counts the number of documents that have been downloaded via the Document Download Manager, accessible via the "Download" link at the top of a search result list.



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API usage

Overview

Discover how users within your institution are using Elsevier APIs (such as Scopus or ScienceDirect).

Data update period: Weekly

COUNTER compliant:
Truthful yet not fully compliant

Audience

- Librarians
- Research leaders
- Corporate customers

Why is this important

Find out if APIs are being utilised at your institution and if not contact your AM or CC to discuss training and how these can improve your researchers user experience.

How to use

This widget shows the usage trends of platform APIs and the use cases which are connected to the APIs.

- Scopus APIs expose curated abstracts and citation data from all scholarly journals indexed by Scopus.
- ScienceDirect APIs expose peer-reviewed full-text scientific, technical and medical content from all scholarly publications indexed by ScienceDirect, Elsevier's premier scientific platform.

IN THIS WIDGET YOU CAN

- check how often researchers in your institution are using Scopus APIs
- get detailed insights which APIs they are using and get an idea of the possible use cases connected to these APIs
- use this information to understand the value of Scopus and to inform policy within their library or institution

SCOPUS APIs CONNECTED TO USE CASES

The Scopus APIs have different purposes. Below we will give an overview of the possible use cases corresponding with the usage of specific APIs.

- Showing publications from Scopus on your website
- Showing Scopus cited-by counts on your website
- Doing federated search
- Showing SNIP/SJR/CS metrics on journal homepage
- Populating IRs with basic document metadata
- Populating CRIS with document and citation overviews
- Advanced Research use cases e.g. Citation network analysis, Corporate text mining etc
- Get more info about Elsevier APIs

SCOPUS APIs CONNECTED TO USE CASES

The ScienceDirect APIs have different purposes. Below we will give an overview of the possible use cases corresponding with the usage of specific APIs.

- Doing federated search
- Populating IRs with basic document metadata
- Enabling users to identify the best available version and indicating whether users have access to the full-text on SD
- Ingesting embargo end-dates to check compliance of locally-hosted accepted manuscripts in IR
- Text or Data-Mining
- Importing article into Mendeley using Mendeley Web Importer tool



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Engineering Village usage

Overview

For administrators and librarians who would like to understand how users within their institution are using Engineering Village - trend overview of EV usage

Data update period: Monthly

COUNTER compliant: N/A

Audience

- Librarians
- Research leaders
- Corporate customers

Why is this important

Understand how your users are interacting with the Engineering Village platform. Use this information to understand the value of Engineering Village and showcase it to your institution.

How to use

Department/Account selection allows to display usage numbers on a specific department (account) or an account child (super account).

This widget gives an overview over the key metrics for Engineering Village and shows data for the current year to date and the full last 3 years.



Overview

This report shows the citations, literature discovery and total searches by month.

METRICS USED

- Citations: Number of records viewed in citation format. On the results page after a search, the number of records displayed on the page is added to the citation count.
- Literature discovery: The sum of abstract record views, detailed record views and outward links to documents. The literature discovery actions are broken out in the Literature discovery report (see below).
- Total searches: Sum of manual searches, OpenXML searches and API searches.



Searches

This chart shows the different types of searches that have taken place on Engineering Village.

METRICS USED

- API searches: Number of searches performed through an API
- Combined searches: Combinations of previous queries
- Expert searches: Number of searches performed within the expert search tab
- OpenXML searches: Number of searches performed through open XML
- Quick searches: Number of searches performed within the quick search tab
- Thesaurus searches: Number of searches performed within the thesaurus search tab

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Searches by database combination

The table will show which database combination is selected by the user. It will answer the question whether users search within a single database, or if they combine two or more databases for a search and which databases are combined. It will display only the top 10 combinations of databases selected by the user for the last current available month.



Literature discovery

This chart shows the abstract record views, detailed record views and outward links to documents.

METRICS USED

- Abstract record views: Number of records viewed in abstract format
- Detailed record views: Number of records viewed in detailed format
- Direct full-text links: number of clicks on full-text link
- Link resolver links: number of clicks on a local full-text link



Popular Publications

Overview

Global views of your researchers' publications on ScienceDirect. Intended for librarians or research administrators within academic institutions.

Data update period: Weekly

COUNTER compliant:
Truthful yet not fully compliant

Audience

- Librarians
- Research leaders
- Corporate customers

Why is this important

Provides a current overview of the most read articles produced by your own authors on ScienceDirect.

How to use

YOU CAN

- use the articles here as examples in social media outreach and courses.
- approach the authors to find out how they managed to reach so many people.
- use the list to showcase their research that is popular globally now.

Ten articles with the most views on ScienceDirect last week are shown along with the following fields: Title (of the article), Authors, Year (of publication), Journal title, number of views on ScienceDirect last week. The articles taken into consideration for the list are all publications by your authors which are published on ScienceDirect. You can opt to limit these to publications from the last 5 years only.

Clicking on the article title will take you directly to the article itself on ScienceDirect. There you can find out more, such as citations and alternative metrics or you can export the article from there to Mendeley to be part of your personal reading list.

METRICS USED



Articles with at least one author stating they are affiliated with your institution and views on ScienceDirect (This number is truthful yet not fully COUNTER compliant).



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Efficiency gains

Overview

The widget shows an estimate of how much time was saved across your institution by using the 'Recommended articles' on ScienceDirect. The idea is to empower you with this number and the graphic for user training.

Data update period: Monthly

COUNTER compliant: N/A

Audience

- Librarians
- Research leaders
- Corporate customers

Why is this important

Understand the value, but help promote adoption of tools that provide users with an easier workflow.

How to use

'Recommended articles' are listed on the right-hand side of publications in ScienceDirect. The algorithm behind this is based on numerous content usage and social signals.

A use of this feature is recorded if and only if one of the recommended articles is viewed. The graph in the widget shows usage per month of the 'Recommended articles' function in the last 12 months.

The stopwatch shows the total time saved by your institution based on total usage in this graph.

The time has been estimated by comparing the time taken to reach the article via the recommender with the time taken to find a similarly relevant publication through search.

Testing shows that the article recommender saves users on average 110 seconds per view.

This widget does not succeed in showing the full value of the function displayed. Finding articles one wouldn't have found otherwise resulting in key insight might be more even important than time saved, but is more difficult to measure.



Global collaborations

Overview

Explore your global collaboration network based on your researchers' publication co-authorships. This map is powered by SciVal. To see how SciVal can help your organisation, please visit the Request Consultation page.

Data update period: Weekly

COUNTER compliant: N/A

Audience

- Librarians
- Research leaders
- Corporate customers

Why is this important

Understand the way researchers within your institution are collaborating with peers worldwide. Global collaborations are great for your researchers academic resume.

How to use

On first view, the map shows how many institutions or organizations in each region of the world your institution has collaborated with over the last three full years resulting in co-authored publications captured by Scopus.

Clicking on the regional label will show the collaborations per country. Clicking on the country label will show the three institutions that your institution's researchers have collaborated with most, ranked by number of co-authored publications.

Also shown are the Field Weighted Citation Impact of these co-authored articles. These can be compared with your institution's overall Field Weighted Citation Impact. This would give you an idea if the collaboration has contributed positively to your institution's overall impact.

Further deep dive into collaboration is available in Scival. If your institution has a subscription to SciVal you can click through to the appropriate page on SciVal from the widget directly.

METRICS USED



The global collaboration graph makes use of 'co-authored publications' and 'Field Weighted Citation Impact'. These metrics have been defined in the Snowball Metrics initiative created by a group of international universities aiming to create metrics for use in reliable comparisons.



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Journal demand

Overview

Select or search for a journal in your ScienceDirect portfolio to see its annual usage trend and inform your planning.

Data update period: Monthly

COUNTER compliant: Yes

Audience

- Librarians
- Research leaders
- Corporate customers

Why is this important

Make decisions about journal collection development.

How to use

YOU CAN

In this widget you can check for each journal available on ScienceDirect how many times articles have been downloaded. By default, the top journal is selected for presentation in the graph on the right pane. You can select other journals from the list by clicking on the title or by simply typing in at least three letters from the journal title or three digits from the journal's ISSN where it reads 'Search all journals in ScienceDirect'.

The default view for the graph is annual downloads for all age types of the journal. You can change to monthly view by clicking on one of the year bars. You can take out age types by clicking on items in the legend.

As with most charts, switching between a graphical and tabular view is possible. With the 'Export' feature pick the insights in your format of choice to use in your reports and presentations.

METRICS USED



Counter compliant 'usage by month & journal' report

JR_J1 report on key request metrics needed to evaluate the effectiveness of a given journal through ScienceDirect.com subscription. The report is, like all other COUNTER reports, still available on E-PIC.



Book Turnaways – high-level

Overview

Top 15 non-subscribed book packages, most requested by your researchers in the last 12 months.

Data update period: Monthly

COUNTER compliant: Yes

Audience

- Librarians
- Research leaders
- Corporate customers

Why is this important

Explore gaps in your E-book portfolio and make strategic additions based on what your users need. If you would like a detailed report (including breakdowns of book type eg MRWs, Book series, textbook) please contact your local Books Solutions Specialist.

How to use

YOU CAN

This widget shows book package titles available on ScienceDirect and their 'turnaways': an access denial due to absence of a subscription.

METRICS USED



Counter compliant 'access denied – no license' by book and month: TR_B2, aggregated at books package level is used, where users were denied access because the institution did not have a license for the book. The report is, like all other COUNTER reports, is still available on E-PIC.



Journal Turnaways

Overview

Journal portfolio gaps at your university. Non-subscribed journal titles, most requested by your researchers in the last 12 months

Data update period: Monthly

COUNTER compliant: Yes

Audience

- Librarians
- Research leaders
- Corporate customers

Why is this important

Explore gaps in your journal portfolio and make strategic additions based on what your users need.

How to use

The widget shows journal titles available on ScienceDirect and their 'turnaways': an access denial due to absence of a subscription. It means that users have found articles in this journal through search but could not use it. Distinguish current content from backfiles content.

The default view for the graph is annual turnaways for all age types of the journal. You can change to monthly view by clicking on one of the year bars. You can take out age types by clicking on the age types in the legend.

METRICS USED



Counter compliant 'access denied - no license' by journal and month: report TR_J2, where users were denied access because their institution did not have a license for the journal. The report is, like all other COUNTER reports, still available on E-PIC.

Journal value beyond downloads

Overview

Compare publications and references from your institution and CiteScore for all 20,000+ Scopus journals. Metrics powered by your Scopus subscription. (available to institutions subscribing to Scopus)

Data update period: Weekly

COUNTER compliant: N/A

Audience

- Librarians
- Research leaders
- Corporate customers

Why is this important

Make decisions about journal collection development.

How to use

With this comprehensive and objective tool you can compare journals based on real usage within your institution.

- ‘Comprehensive’ because all journals indexed in Scopus are available.
- ‘Objective’ because inclusion criteria for Scopus are based on quality and reliability, not on publisher provenance.
- ‘Real usage’ because the metrics included here indicate journals being used by your researchers to publish in or cite from.

USING IT

The pane on the left shows 10 journals ranked by the latest year’s value of the following metrics: References, Publications, CiteScore, and Read (upcoming). ‘Sort by’ the metric of your choice.

With ‘Add journal’ you can expand this list with any journal in Scopus – type at least two letters from the journal title or two digits from the journal’s ISSN and the tool will suggest titles.

The pane on the right shows the trends of metrics over time for the journals you selected. You can compare the journals by the metric of choice by selecting the appropriate tab. From the list, up to 15 titles can be clicked to be included in the graph on the right.

Comparison between PLoS ONE and 4 other journals. PLOS One (stylised PLOS ONE, and formerly PLoS ONE) is a peer-reviewed open access scientific journal published by the Public Library of Science (PLOS)

METRICS USED



References: count of references to mentioned journal by articles with at least one author from your institution.



Publications: Count of articles published in mentioned journal with at least one author affiliated to your institution, based on Scopus affiliation ID. Please see ‘Data sources’ for the list of ID’s used.

High counts suggest the journal’s popularity as a trusted publication.



CiteScore: a new standard that gives a more comprehensive, transparent and current view of a journal’s impact. See also: CiteScore.



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Remote Access Usage

Overview

Understand how your institution's subscription on ScienceDirect is being accessed by the users. You have configured remote access (Federated Single Sign on) through which your users have benefited from off campus access to your ScienceDirect subscription.

Data update period: Weekly

COUNTER compliant:
Truthful yet not fully compliant

Audience

- Librarians
- Research leaders
- Corporate customers

Why is this important

Share these metrics with your digital/e-content teams

How to use

YOU CAN

- Check your share of remote usage and compare it that of other institutions
- View the number of documents downloaded each month through remote access
- Compare the desktop usage with mobile usage
- Compare the usage on campus with the usage off campus and see what share of it is personalized
- Share of remote usage

Documents being downloaded

The documents being downloaded each month are shown for the last 12 months. This analysis shows you how usage of ScienceDirect in the last month compares to the previous months. Through this analysis you can observe the seasonality of remote access in your institution.

Devices people are using in your institution

This analysis shows the comparison of the usage of ScienceDirect through desktop computers (and laptops/notebooks) and handheld devices like tablets, cellphones etc.

On campus usage vs. remote usage

This analysis shows how much of on campus usage is personalized. Personalized usage means your users were signed in to ScienceDirect while using it. This allows ScienceDirect to offer personalized recommendations based on the users' research needs through its advanced article recommender systems. You can view the similar insights for usage of ScienceDirect happening off campus through remote access.

METRICS USED



Documents downloaded are the articles viewed on screen or articles downloaded in the PDF (or other) formats. (This number is truthful yet not fully COUNTER compliant).

Comparison of devices used and campus vs remote usage are made based on the user sessions. (This number is truthful yet not fully COUNTER compliant).



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SUPPORT

E-PIC support

service.elsevier.com/app/contact/supporthub/E-PIC/

Audience

- All

Customer Consultant

CONTACT YOUR LOCAL CONSULTANT

- If you require additional reports or information
- Notice abnormal fluctuations in usage
- Request a report be added to E-PIC
- Suggest a change/update to E-PIC



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