

Introduction to Primo VE Analytics

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Knowledge Days



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An illustration of a laptop with a white agenda overlay on its screen. The agenda is titled 'Agenda' and contains a list of five items, each with a blue checkmark and a horizontal bar representing a task. The background features three overlapping circles in shades of green and blue.

Agenda

- _____
- _____
- _____
- _____
- _____

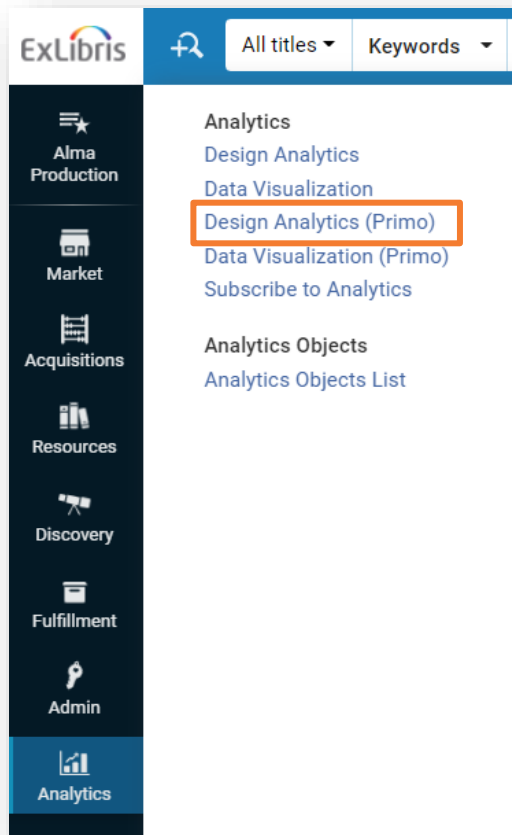
- Primo Analytics
- Dashboards and Reports
- Create Your Own
- Scheduling Analytics

What is Primo Analytics?

- Platform to build, customize, and run reports on Primo activities
- Uses Oracle Analytics Server (OAS)



Primo VE in Alma



Roles for Primo Analytics

- **Designs Analytics**—Enables creating analytics reports.
- **Analytics Administrator**—Enables configuring analytics and exposing analytics to other staff members.

How Current is the Analytics Data?

- Data is exported nightly from Alma to Oracle Analytic Server (OAS)
- Data goes through the ETL Process: Extract, Transform, Load
- Date and time stamps for the extract and availability of your Alma/Primo VE data shows at the bottom of the Analytics Menu

Alma Production

Acquisitions

Resources

Admin

Analytics

Show MDE

Configuration

Analytics

[Subscribe to Analytics](#)

Data available as of: 02/02/2022 22:41:47 EST
Data updated as of: 02/02/2022 19:00:00 EST

OAS Default Screen

The screenshot displays the OAS Default Screen, a file management interface. At the top, a blue header bar contains the 'Catalog' title and navigation links: 'Home', 'Catalog' (highlighted), 'Favorites', 'Dashboards', 'Create', and 'Open', along with a user profile icon. Below the header is a toolbar with various icons for file operations and a 'Location' dropdown set to '/My Folders'. A 'Show Hidden Items' checkbox is also present. The main interface is divided into three sections: a left sidebar with 'Folders' (containing 'My Folders' and 'Shared Folders') and 'Tasks' (listing actions like Expand, RSS, Delete, Copy, Rename, Archive, Unarchive, Upload, Properties, and Permissions); a central area with 'Type All', 'Sort Name A-Z', and 'Show More Details' options; and a bottom 'Preview' section.

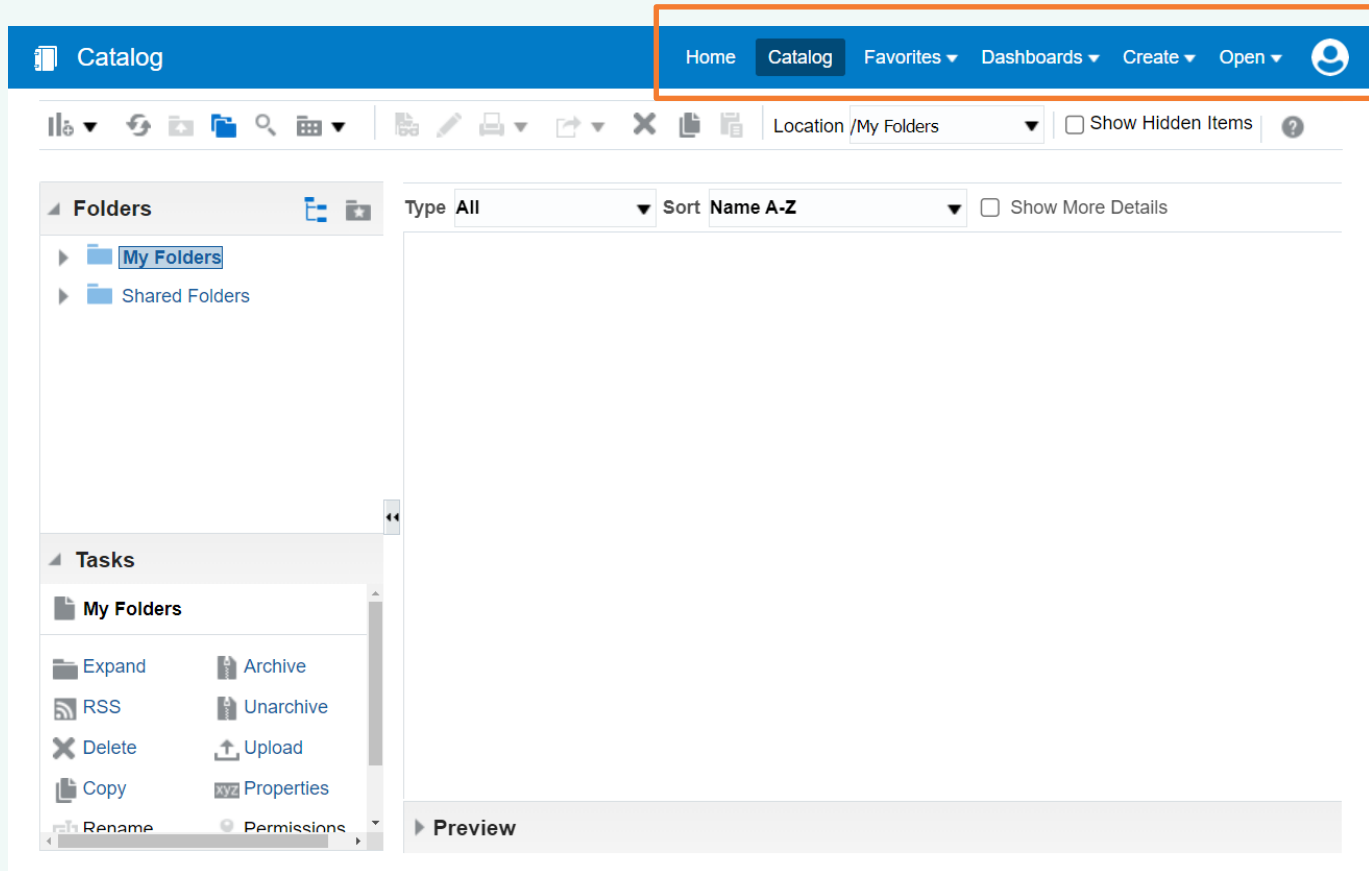
OAS Default Screen

The screenshot displays the OAS (Open Access System) default screen. The interface features a blue header bar with the following elements from left to right: a 'Catalog' icon and label, a 'Home' link, a 'Catalog' link (highlighted with an orange box), a 'Favorites' dropdown menu, a 'Dashboards' dropdown menu, a 'Create' dropdown menu, an 'Open' dropdown menu, and a user profile icon.

Below the header is a toolbar containing various icons for file operations (such as refresh, copy, paste, delete, print) and a 'Location /My Folders' dropdown menu. To the right of the toolbar is a 'Show Hidden Items' checkbox and a help icon.

The main content area is divided into two sections. On the left is a 'Folders' sidebar with a tree view showing 'My Folders' (selected) and 'Shared Folders'. Below this is a 'Tasks' sidebar with a list of actions: Expand, Archive, RSS, Unarchive, Delete, Upload, Copy, Properties, Rename, and Permissions. The main area on the right has a 'Type All' dropdown, a 'Sort Name A-Z' dropdown, and a 'Show More Details' checkbox. At the bottom of this area is a 'Preview' section.

Global Header



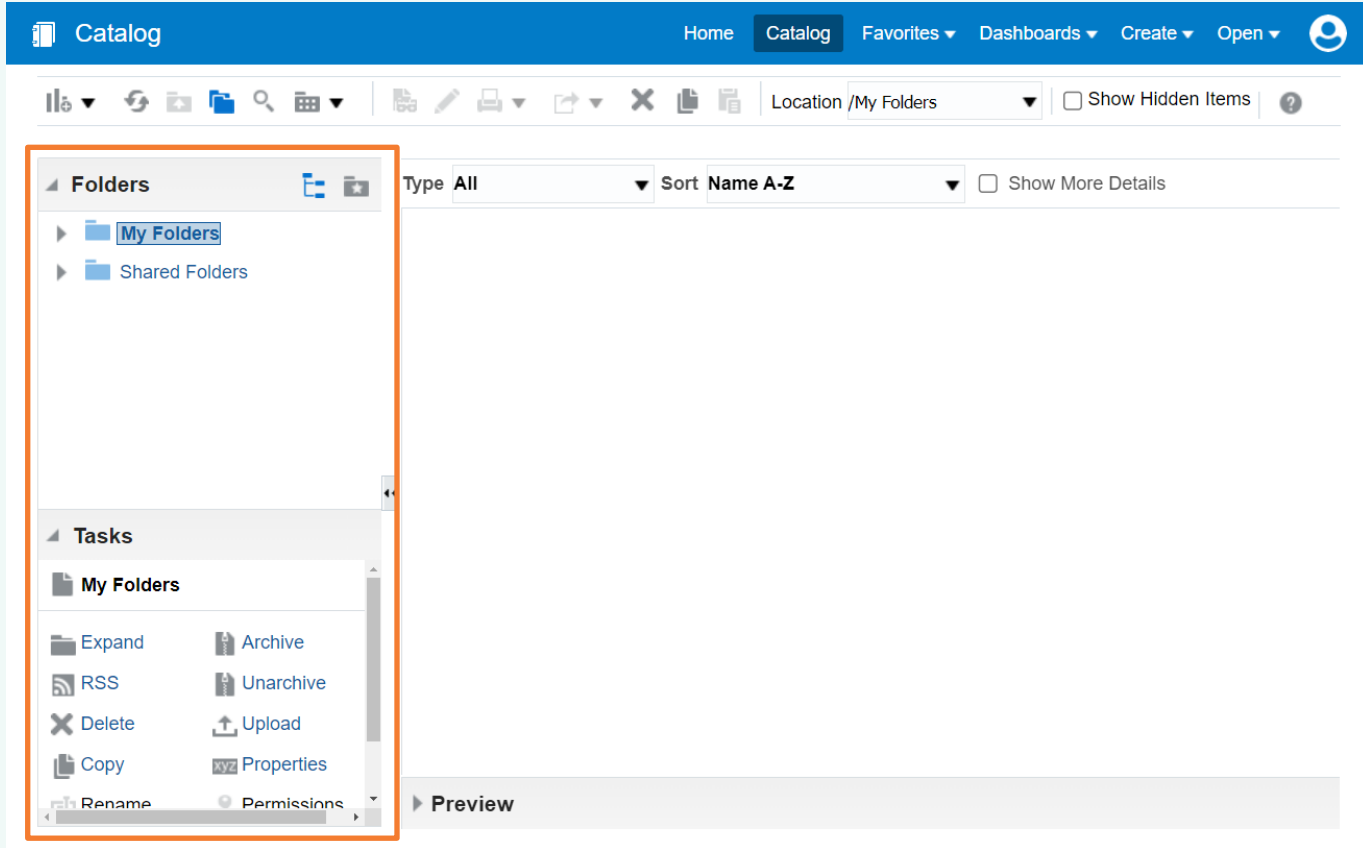
Catalog Screen

The screenshot displays the 'Catalog' application interface. At the top, a blue navigation bar contains the 'Catalog' title, a 'Home' button, and a menu with 'Catalog', 'Favorites', 'Dashboards', 'Create', and 'Open'. A user profile icon is on the right. Below the navigation bar is a toolbar with various icons for file operations and a 'Location' dropdown set to '/My Folders'. A 'Show Hidden Items' checkbox is also present.

The main content area is divided into three sections:

- Folders:** A sidebar on the left showing a tree view with 'My Folders' (selected) and 'Shared Folders'.
- Tasks:** A sidebar below 'Folders' listing actions for 'My Folders': Expand, Archive, RSS, Unarchive, Delete, Upload, Copy, Properties, Rename, and Permissions.
- Preview:** A large central area for displaying file details, currently empty. Above it are controls for 'Type' (All), 'Sort' (Name A-Z), and a 'Show More Details' checkbox.

Folders Pane



Tasks for Selected Folder

The screenshot displays a web-based file management application. At the top, a blue navigation bar contains the text "Catalog" and several menu items: "Home", "Catalog", "Favorites", "Dashboards", "Create", and "Open". Below this is a toolbar with various icons for file operations and a "Location" dropdown set to "/My Folders".

The main interface is divided into two sections. On the left, a "Folders" sidebar shows a tree view with "My Folders" selected and "Shared Folders" below it. On the right, a main content area shows "Type All" and "Sort Name A-Z" options, with a "Show More Details" checkbox.

An orange-bordered box highlights the "Tasks" panel, which is open for the selected "My Folders". The tasks listed are:

- Expand
- RSS
- Delete
- Copy
- Rename
- Archive
- Unarchive
- Upload
- Properties
- Permissions

At the bottom of the interface, a "Preview" section is partially visible.

Folders Pane

The screenshot displays a file management application interface. At the top, a blue navigation bar contains the text "Catalog" and several menu items: "Home", "Catalog", "Favorites", "Dashboards", "Create", and "Open". Below this is a toolbar with various icons for file operations. The main area is divided into two panes. The left pane, titled "Folders", is highlighted with an orange border and contains a tree view with "My Folders" and "Shared Folders". The right pane, titled "Tasks", is currently empty and contains a list of actions: "Expand", "Archive", "RSS", "Unarchive", "Delete", "Upload", "Copy", "Properties", "Rename", and "Permissions". The "Preview" pane at the bottom is also empty.

When we select a folder...

Detailed Folder Contents

Catalog Home Catalog Favorites Dashboards Create Open

Location /Shared Folders/Primo Show Hidden Items

Folders

- My Folders
 - My Dashboard
- Shared Folders
 - Primo
 - Primo Community**
 - Primo TRAINING_2_INST

Tasks

Primo Community

- Expand Archive
- RSS Unarchive
- Delete Upload
- Copy Properties
- Rename Permissions

Type All Sort Name A-Z Show More Details

	Dashboards Last Modified 2/1/2018 1:13:24 PM Owner System Account Expand More
	Prompts Last Modified 2/1/2018 1:13:24 PM Owner System Account Expand More
	Reports Last Modified 7/16/2019 8:07:40 PM Owner System Account count of items loaned Expand More
	Subject Area Contents Last Modified 2/1/2018 1:13:24 PM Owner System Account Expand More
	Action Usage Searches a Previous Week Last Modified 11/19/2020 6:33:42 AM Owner System Account Open Edit More
	Test_nb_records Last Modified 11/19/2020 6:33:42 AM Owner System Account Open Edit More

Preview

To Home...

The screenshot shows a library catalog interface. At the top, a blue navigation bar contains the following elements: a 'Catalog' icon and label, a 'Home' button (highlighted with an orange box), a 'Catalog' dropdown menu, and several other dropdown menus: 'Favorites', 'Dashboards', 'Create', and 'Open'. A user profile icon is visible on the far right of the navigation bar.

Below the navigation bar is a toolbar with various icons for file operations (copy, paste, delete, etc.) and a 'Location' dropdown menu set to '/Shared Folders/Primo'. A 'Show Hidden Items' checkbox is also present.

The main content area is divided into two columns. The left column contains a 'Folders' sidebar with a tree view showing 'My Folders' (containing 'My Dashboard') and 'Shared Folders' (containing 'Primo', 'Primo Community', and 'Primo TRAINING_2_INST'). Below the folders is a 'Tasks' section for 'Primo Community' with icons for 'Expand', 'Archive', 'RSS', 'Unarchive', 'Delete', 'Upload', 'Copy', 'Properties', 'Rename', and 'Permissions'.

The right column displays a list of items. At the top, there are filters for 'Type All', 'Sort Name A-Z', and a 'Show More Details' checkbox. The list contains the following items:

- Dashboards**: Last Modified 2/1/2018 1:13:24 PM | Owner System Account. Includes 'Expand' and 'More' links.
- Prompts**: Last Modified 2/1/2018 1:13:24 PM | Owner System Account. Includes 'Expand' and 'More' links.
- Reports**: Last Modified 7/16/2019 8:07:40 PM | Owner System Account. Description: 'count of items loaned'. Includes 'Expand' and 'More' links.
- Subject Area Contents**: Last Modified 2/1/2018 1:13:24 PM | Owner System Account. Includes 'Expand' and 'More' links.
- Action Usage Searches a Previous Week**: Last Modified 11/19/2020 6:33:42 AM | Owner System Account. Includes 'Open', 'Edit', and 'More' links.
- Test_nb_records**: Last Modified 11/19/2020 6:33:42 AM | Owner System Account. Includes 'Open', 'Edit', and 'More' links.

At the bottom of the right column, there is a 'Preview' section.

Home Screen

The screenshot shows the Oracle Analytics Home Screen. At the top is a blue navigation bar with a home icon, the text "ORACLE Analytics", and several menu items: "Home" (highlighted), "Catalog", "Favorites" (with a dropdown arrow), "Dashboards" (with a dropdown arrow), "Create" (with a dropdown arrow), "Open" (with a dropdown arrow), and a user profile icon.

The main content area is divided into two columns. The left column is titled "Create..." and contains three items:

- Analysis and Interactive Reporting**: Includes links for "Analysis", "Dashboard", and "More" (with a dropdown arrow).
- Published Reporting**: Includes links for "Report", "Report Job", and "More" (with a dropdown arrow).
- Actionable Intelligence**: Includes a link for "Action".

The right column is titled "Recent" and contains a section for "Dashboards" with three items:

- My Dashboard - page 1**: Includes links for "Open", "Edit", and "More" (with a dropdown arrow).
- Example Dashboard - Devi...**: Includes links for "Open" and "More" (with a dropdown arrow).
- Example Dashboard -**: Includes links for "Open" and "More" (with a dropdown arrow).

Below the dashboards is a link for "Download Desktop Tools" with a dropdown arrow.

At the bottom of the left column, under the heading "Jobs", there are two links: "Report Jobs" and "Report Job History".

A horizontal scrollbar is visible at the bottom of the page.

Recently Used Dashboards

ORACLE Analytics Home Catalog Favorites Dashboards Create Open

Create...

- Analysis and Interactive Reporting
Analysis Dashboard More
- Published Reporting
Report Report Job More
- Actionable Intelligence
Action

Jobs

- Report Jobs
- Report Job History

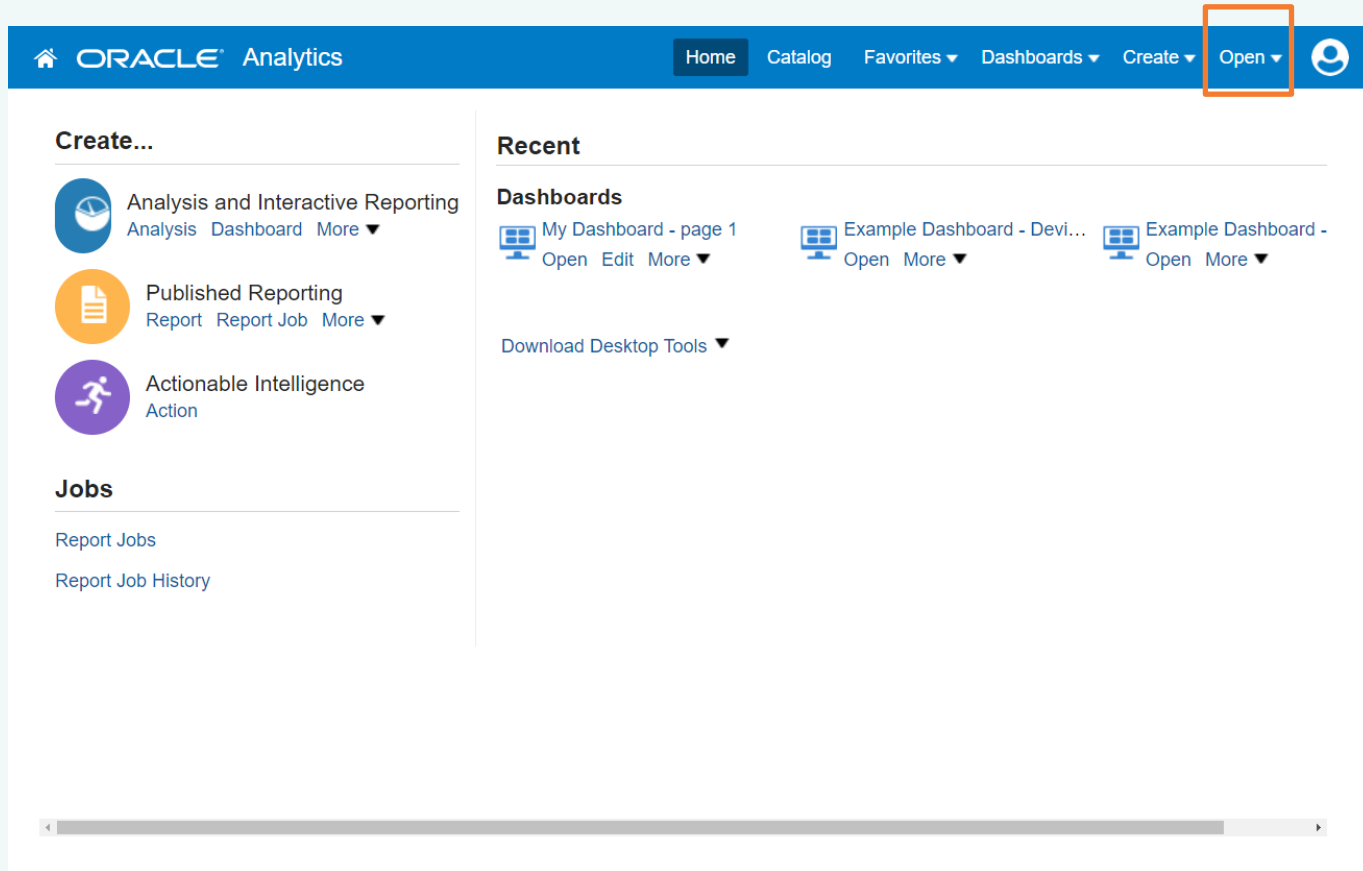
Recent

Dashboards

- My Dashboard - page 1
Open Edit More
- Example Dashboard - Devi...
Open More
- Example Dashboard -
Open More

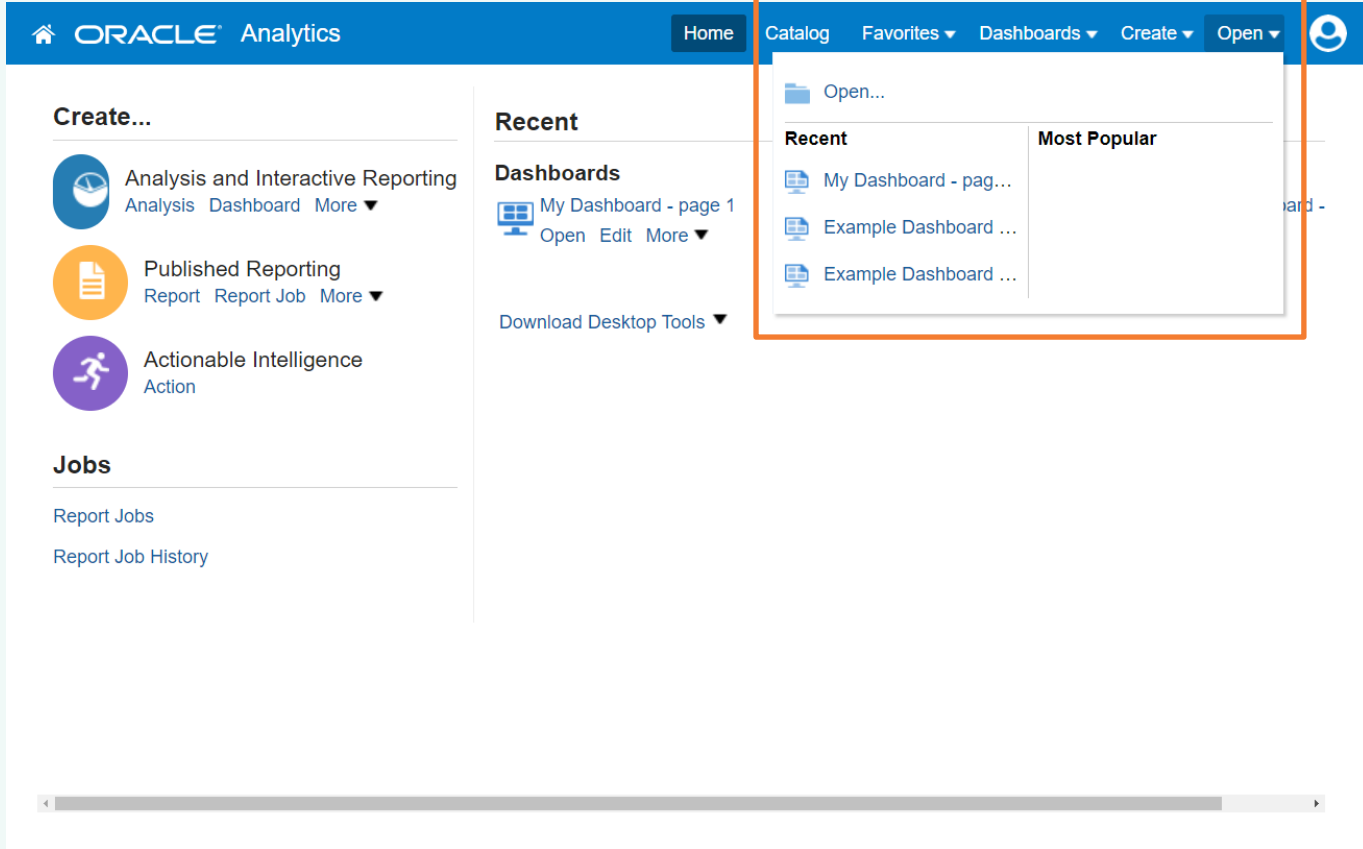
[Download Desktop Tools](#)

“Open” Menu



The screenshot displays the Oracle Analytics user interface. At the top, a blue navigation bar contains the Oracle Analytics logo on the left and a series of menu items on the right: Home, Catalog, Favorites, Dashboards, Create, and Open. The 'Open' menu item is highlighted with an orange rectangular box. Below the navigation bar, the main content area is divided into two columns. The left column is titled 'Create...' and contains three items: 'Analysis and Interactive Reporting' with sub-links for Analysis, Dashboard, and More; 'Published Reporting' with sub-links for Report, Report Job, and More; and 'Actionable Intelligence' with a sub-link for Action. Below this is a 'Jobs' section with links for Report Jobs and Report Job History. The right column is titled 'Recent' and contains a 'Dashboards' section with three items: 'My Dashboard - page 1' with sub-links for Open, Edit, and More; 'Example Dashboard - Devi...' with sub-links for Open and More; and another 'Example Dashboard -' with sub-links for Open and More. Below the dashboards is a link for 'Download Desktop Tools'. A horizontal scrollbar is visible at the bottom of the page.

“Open” Menu

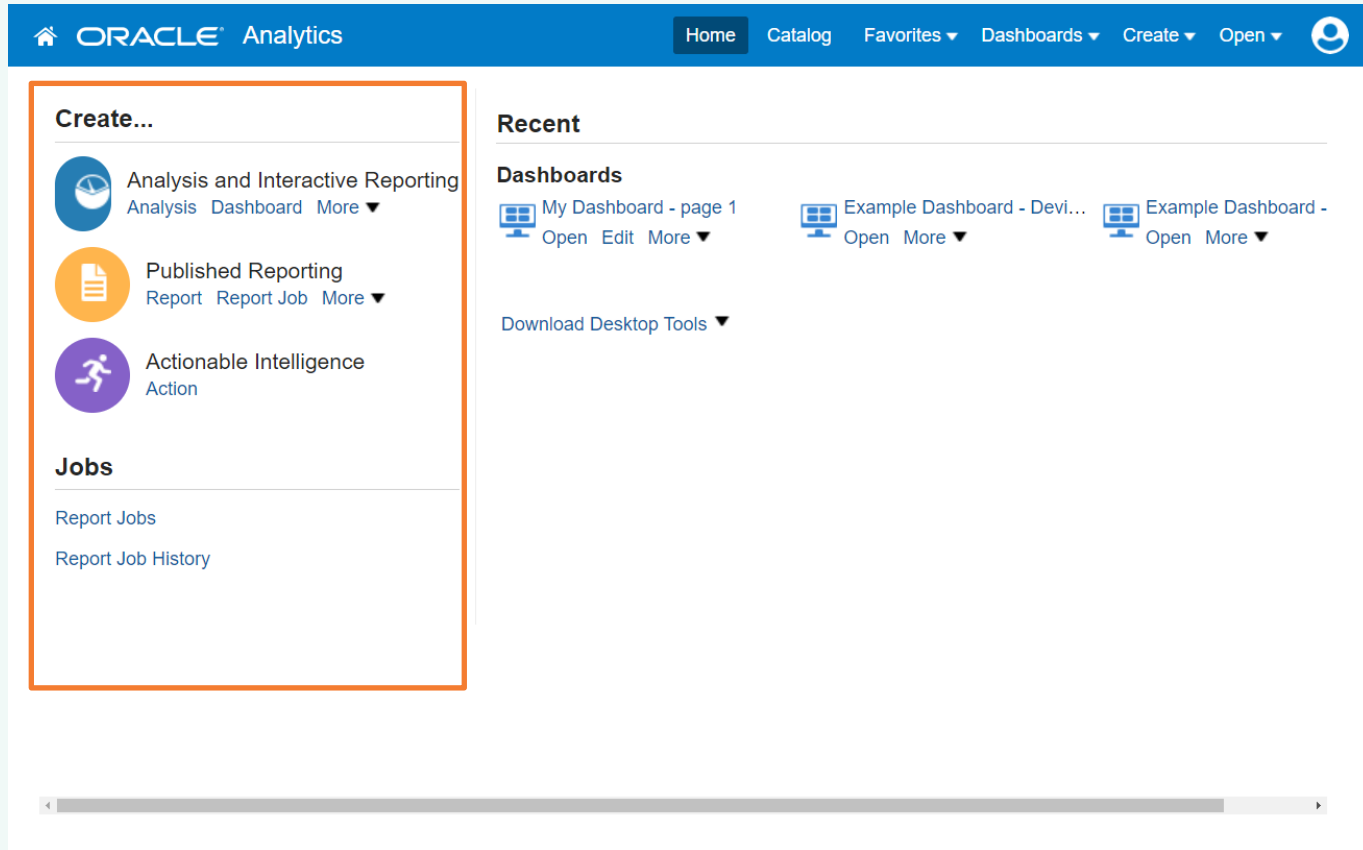


The screenshot shows the Oracle Analytics interface with the 'Open' menu open. The menu is highlighted with an orange border and contains the following items:

- Open...
- Recent
 - My Dashboard - pag...
 - Example Dashboard ...
 - Example Dashboard ...
- Most Popular

The background interface includes a blue header with the Oracle Analytics logo and navigation links: Home, Catalog, Favorites, Dashboards, Create, and Open. The main content area is divided into sections: 'Create...' with options for Analysis and Interactive Reporting, Published Reporting, and Actionable Intelligence; 'Recent' with a 'Dashboards' section listing 'My Dashboard - page 1' and 'Download Desktop Tools'; and 'Jobs' with 'Report Jobs' and 'Report Job History'.

“Create” Actions



The screenshot shows the Oracle Analytics interface. The top navigation bar is blue and contains the Oracle logo, the text 'Analytics', and several menu items: 'Home', 'Catalog', 'Favorites', 'Dashboards', 'Create', and 'Open'. A user profile icon is on the right. The main content area is divided into two columns. The left column is titled 'Create...' and is enclosed in an orange border. It contains three main categories: 'Analysis and Interactive Reporting' with sub-items 'Analysis', 'Dashboard', and 'More'; 'Published Reporting' with sub-items 'Report', 'Report Job', and 'More'; and 'Actionable Intelligence' with sub-item 'Action'. Below these is a 'Jobs' section with sub-items 'Report Jobs' and 'Report Job History'. The right column is titled 'Recent' and contains a 'Dashboards' section with three dashboard items: 'My Dashboard - page 1' (with 'Open', 'Edit', 'More' options), 'Example Dashboard - Devi...' (with 'Open', 'More' options), and 'Example Dashboard -' (with 'Open', 'More' options). Below the dashboards is a 'Download Desktop Tools' link. A horizontal scrollbar is visible at the bottom of the page.

ORACLE Analytics

Home Catalog Favorites Dashboards Create Open

Create...

- Analysis and Interactive Reporting
Analysis Dashboard More
- Published Reporting
Report Report Job More
- Actionable Intelligence
Action

Jobs

- Report Jobs
- Report Job History

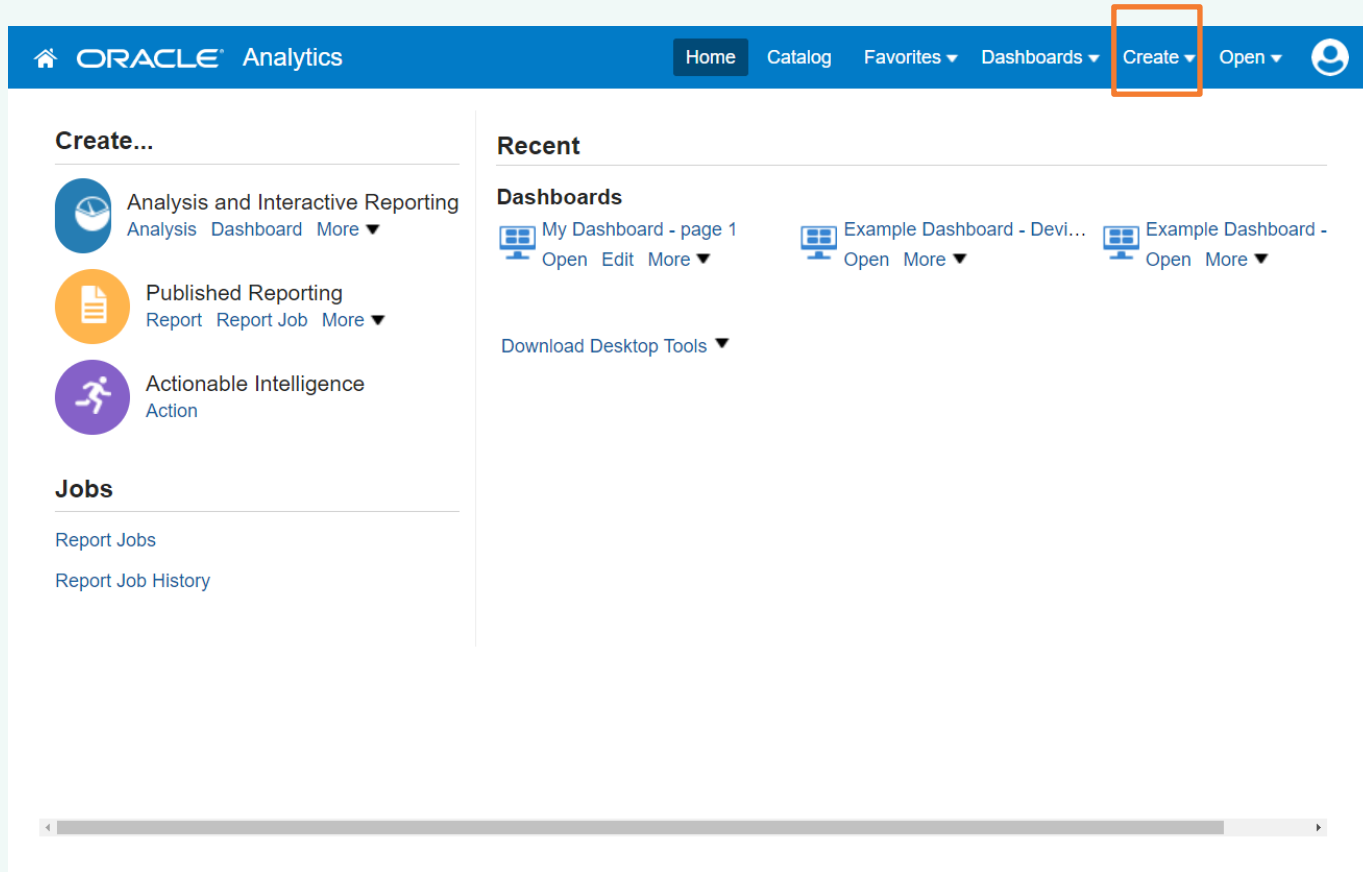
Recent

Dashboards

- My Dashboard - page 1
Open Edit More
- Example Dashboard - Devi...
Open More
- Example Dashboard -
Open More

Download Desktop Tools

“Create” Actions



The screenshot displays the Oracle Analytics user interface. At the top, a blue navigation bar contains the Oracle Analytics logo on the left and a series of menu items on the right: Home, Catalog, Favorites, Dashboards, **Create**, and Open. The 'Create' menu item is highlighted with an orange rectangular box. Below the navigation bar, the main content area is divided into two columns. The left column is titled 'Create...' and lists three options: 'Analysis and Interactive Reporting' (with sub-items 'Analysis', 'Dashboard', and 'More'), 'Published Reporting' (with sub-items 'Report', 'Report Job', and 'More'), and 'Actionable Intelligence' (with sub-item 'Action'). Below this is a 'Jobs' section with sub-items 'Report Jobs' and 'Report Job History'. The right column is titled 'Recent' and features a 'Dashboards' section with three items: 'My Dashboard - page 1' (with sub-items 'Open', 'Edit', and 'More'), 'Example Dashboard - Devi...' (with sub-items 'Open' and 'More'), and another 'Example Dashboard -' (with sub-items 'Open' and 'More'). Below the dashboards is a 'Download Desktop Tools' link. A horizontal scrollbar is visible at the bottom of the page.

“Create” Actions

The screenshot shows the Oracle Analytics interface with the 'Create' dropdown menu open. The menu is highlighted with an orange border and contains the following items:

- Analysis and Interactive Reporting**
 - Analysis
 - Dashboard
 - Filter
 - Dashboard Prompt
 - Condition
- Published Reporting**
 - Report
 - Report Job
 - Data Model
 - Style Template
 - Sub Template
- Actionable Intelligence**
 - Action

The background interface includes a top navigation bar with 'ORACLE Analytics', 'Home', 'Catalog', 'Favorites', 'Dashboards', 'Create', and 'Open'. The main content area is divided into three sections: 'Create...' with three options (Analysis and Interactive Reporting, Published Reporting, Actionable Intelligence), 'Recent' with a dashboard entry 'My Dashboard - page 1', and 'Jobs' with 'Report Jobs' and 'Report Job History'.

Account Tools

ORACLE Analytics

Home Catalog Favorites Dashboards Create Open

Create...

- Analysis and Interactive Reporting
Analysis Dashboard More ▼
- Published Reporting
Report Report Job More ▼
- Actionable Intelligence
Action

Jobs

- Report Jobs
- Report Job History

Recent

Dashboards

- My Dashboard - page 1
Open Edit More ▼
- Example Dashboard - Devi...
Open More ▼
- Example Dashboard -
Open More ▼

Download Desktop Tools ▼

Account Tools

The screenshot displays the Oracle Analytics user interface. At the top, a blue navigation bar contains the Oracle Analytics logo, a home icon, and menu items: Home, Catalog, Favorites, Dashboards, Create, and Open. A user profile icon is located on the right side of the navigation bar. A dropdown menu is open from this icon, listing three options: Help, My Account, and Sign Out. The main content area is divided into two columns. The left column, titled 'Create...', features three sections: 'Analysis and Interactive Reporting' with sub-links for Analysis, Dashboard, and More; 'Published Reporting' with sub-links for Report, Report Job, and More; and 'Actionable Intelligence' with a sub-link for Action. Below this is a 'Jobs' section with links for Report Jobs and Report Job History. The right column, titled 'Recent', has a 'Dashboards' section listing 'My Dashboard - page 1' and 'Example Dashboard - Devi...'. Each dashboard entry includes an 'Open' button and a 'More' dropdown menu. At the bottom of the right column is a 'Download Desktop Tools' link. A horizontal scrollbar is visible at the very bottom of the page.

ORACLE Analytics Home Catalog Favorites Dashboards Create Open

Create...

- Analysis and Interactive Reporting
Analysis Dashboard More
- Published Reporting
Report Report Job More
- Actionable Intelligence
Action

Jobs

- Report Jobs
- Report Job History

Recent

Dashboards

- My Dashboard - page 1
Open Edit More
- Example Dashboard - Devi...
Open More
- Example Dashboard - Devi...
Open More

Download Desktop Tools

Help
My Account
Sign Out

Preferences

Starting Page	Default ▼
Locale (location)	Default - English - United States ▼
User Interface Language	Default - English ▼
Time Zone	Default - Unknown Time Zone ▼
Currency	Default - ▼
Subject Area Sort Order	Default - Sort in Saved Order ▼
Prompts Auto-Complete	<input checked="" type="radio"/> Default <input type="radio"/> On <input type="radio"/> Off
Analysis Editor	<input checked="" type="radio"/> Full Editor <input type="radio"/> Wizard (limited functionality) Default - Start on Results tab when editing Analysis ▼
Accessibility Mode	<input checked="" type="radio"/> Default <input type="radio"/> On <input type="radio"/> Off



Agenda

- _____
- _____
- _____
- _____
- _____

- Primo Analytics
- **Dashboards and Reports**
- Create Your Own
- Scheduling Analytics

What are Reports?

- Reports are responses that return after executing a query
- Can be formatted
- Presented on a dashboard page
- Saved
- Shared with other users



What are Dashboards?

- Dashboards provide a personalized view of information
- Can consist of one or more pages (or tabs)
- Can include reports, graphs, and prompts (objects)
- Can be shared with other users





Agenda

- _____
- _____
- _____
- _____
- _____

- Primo Analytics
- Dashboards and Reports
- **Create Your Own**
- Scheduling Analytics

Create your own

1. Adding an Analysis to My Dashboard
2. Editing a Copied Analysis
3. Creating a New Analysis



An illustration of a laptop with a white agenda overlay on its screen. The agenda is titled 'Agenda' and contains a list of five items, each with a blue checkmark and a horizontal bar representing a task or duration. The background features overlapping circles in shades of green and blue.

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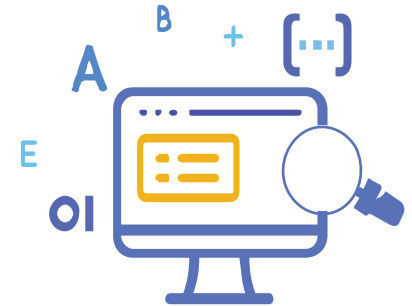
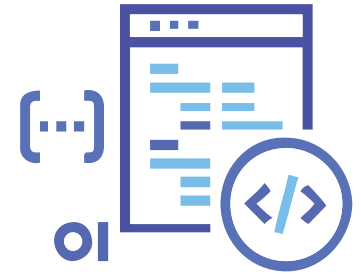
- Primo Analytics
- Dashboards and Reports
- Create Your Own
- **Scheduling Analytics**



Resources

Knowledge Center Resources

- [Primo VE Analytics](#)
- [Go VE](#)—For customers on Primo Classic



Premium Services - a more individualized approach



Premium Services are one-on-one services to customers that are interested in workflow optimization, individualized training, hands-on configuration, or other individualized assistance with Ex Libris products

Premium.Services@clarivate.com

Thank you for joining us for this session!

EX LIBRIS
Knowledge Days



Survey



<https://forms.office.com/r/7QiNMkJpRK>