Primo Analytics

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ExLibris
a ProQuest Company

Introductions

• Ping Gao

Ping joined Ex Libris in 2005. She had worked on Aleph implementation projects, MetaLib and SFX support before she moved to Primo support in 2012. She received MLIS and MS degrees from University of Pittsburgh.

• Matt Warnock

Matt joined the Primo Support Team at the end of 2014 and has recently transitioned to the Customer Success Team. He has worked in both public and academic library settings. He has a MLIS from the University of Illinois at Champaign-Urbana.

Agenda

1 Primo Analytics in a Nutshell

2 Action Identification

3 General Terminology

4 Editing & Creating Reports

5 What's New

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Primo Reports (BIRT) vs. Primo Analytics (OBI)

The Million
Dollar Question!

	Primo Reports (BIRT)	Primo Analytics (OBI)
Database	Primo local DB	Regional dedicated DB
Reporting Tool	BIRT	OBI
New Reports	Difficult	Easy
Editing Reports	Difficult	Easy
Identify Actions	No	Yes
Sharing Reports	No	Yes
Schedule Reports	No	Yes

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Primo Analytics

What are Analytics?	• Allow us to build, customize, and run reports on Primo activities • Built on Oracle Business Intelligence (OBI)
Getting to Primo Analytics	• ***Primo Back Office > Primo Analytics*** • Opens in a new window in OBI • Default page opens to Catalog
Access	• Anyone with institution-level Back Office Access (or higher)

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Primo Analytics – How does it work?

Data captured by beacon

Data collated and inserted into OBI

Institutions use OBI to analyze and report on data

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Action Identification

How to see what is sent to Primo Analytics

- Go to Primo FE
- Open Development tools (F12 in Chrome)
- Switch to **Network** tab
- Search for **beacon**
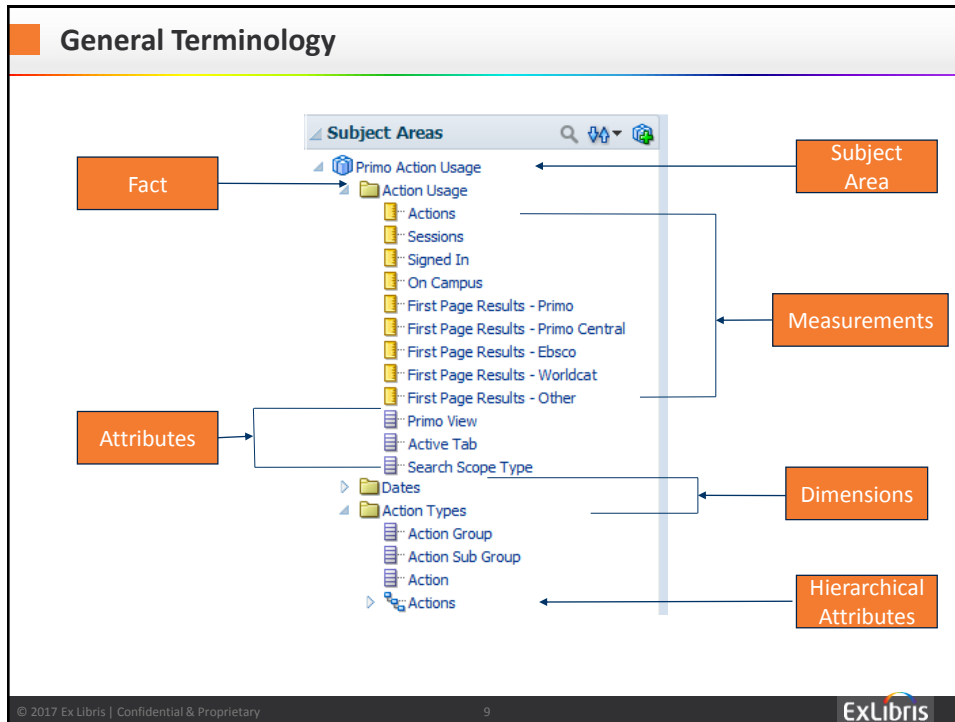- Preform an action
- Check **Query String Parameters**

Action Identification

General Terminology

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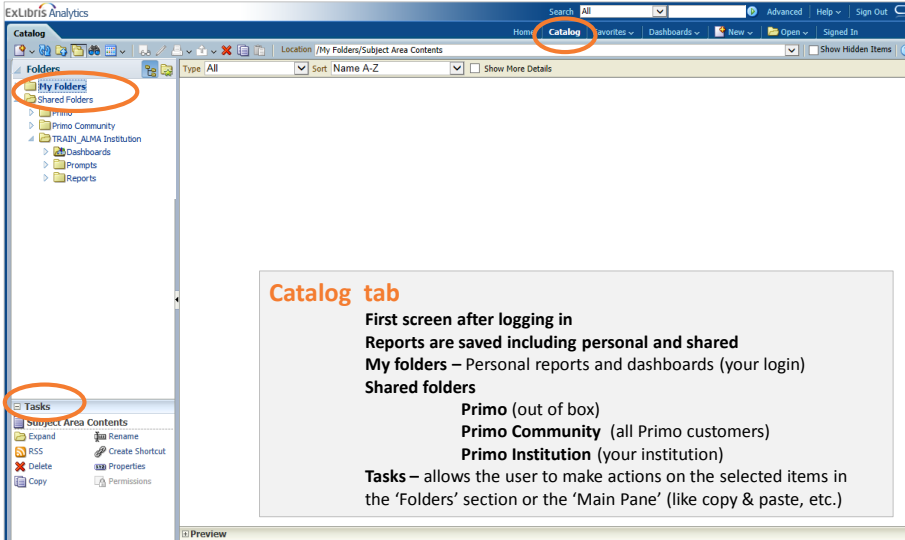## General Terminology

Term	Term Description
Subject Area	Data in Primo Analytics that is organized into subject areas such as Primo Action Usage, Primo Facet Usage, Primo Popular Searches. Subject areas contain folders, measure columns, attribute columns, and hierarchical columns.
Fact Table	Consists of the measurements, metrics, or facts related to a business process and contains the core part of the subject area.
Dimension	Tables that contain descriptive attributes (or fields) that are typically textual fields or discrete numbers behaving like text.
Measurement	A column of data in subject areas that holds a simple list of data values that can change or can be counted or aggregated in some way.
Attribute	A column in subject areas that holds a flat list of values that are also known as members.
Hierarchical Attribute	An attribute holds data values that are organized in a hierarchy. This kind of attribute is displayed using a treelike structure. Individual members are shown in an outline manner, with lower-level members rolling into higher-level members.

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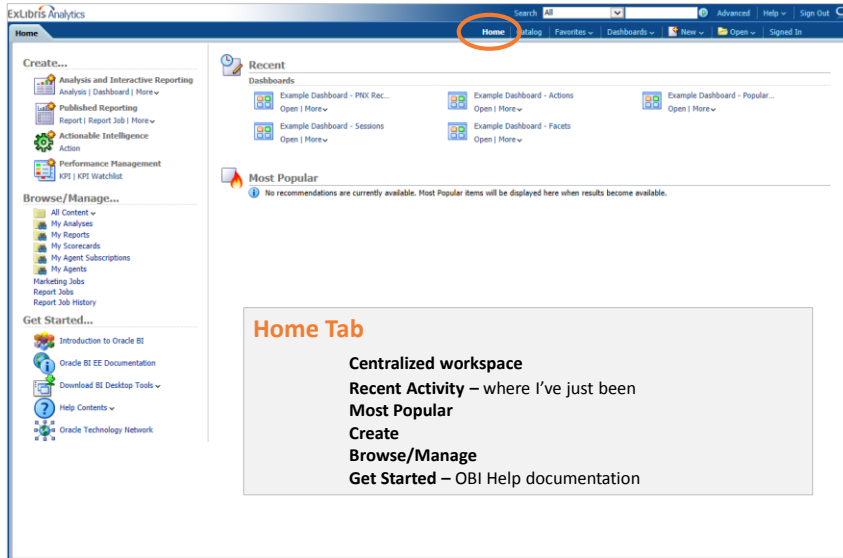## Primo Analytics – Global Header – Catalog

Catalog tab

First screen after logging in
Reports are saved including personal and shared
My folders – Personal reports and dashboards (your login)
Shared folders
      Primo (out of box)
      Primo Community (all Primo customers)
      Primo Institution (your institution)
Tasks – allows the user to make actions on the selected items in
the 'Folders' section or the 'Main Pane' (like copy & paste, etc.)
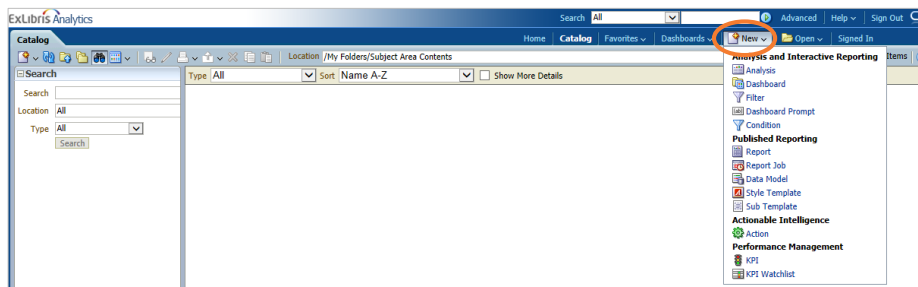
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Primo Analytics – Global Header – Home

Home Tab

Centralized workspace
Recent Activity – where I've just been
Most Popular
Create
Browse/Manage
Get Started – OBI Help documentation

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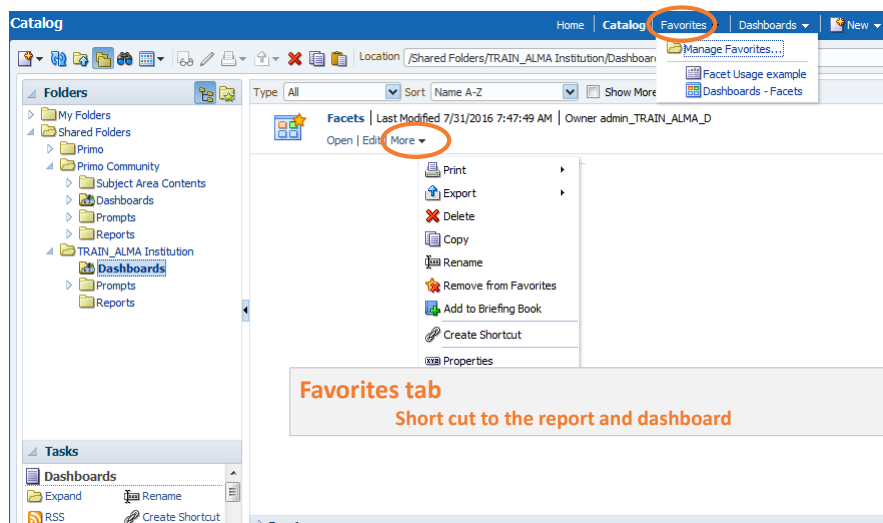## Primo Analytics – Global Header – New

New tab

Analysis – **Create a new report**
Dashboard – **Create a new dashboard**
Options under the Published Reporting subhead are related to OBI only and are not accessible.

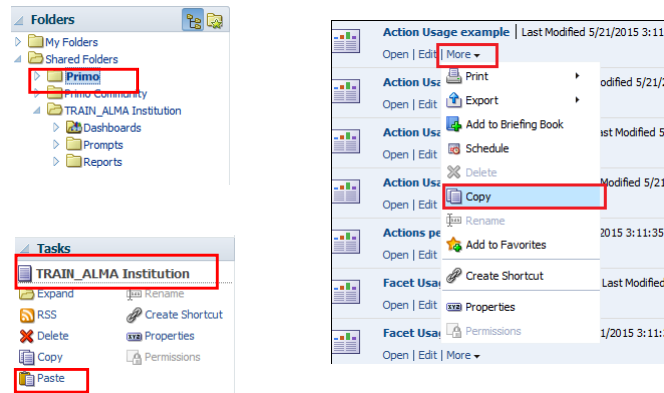## Primo Analytics – Global Header – Favorites

Favorites tab
Short cut to the report and dashboard

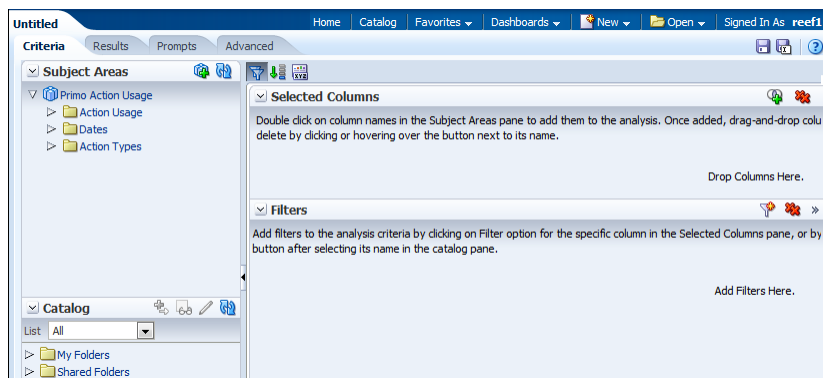## Editing & Creating Reports

1. Creating report by copying a similar report to your institution

Editing & Creating Reports

2. Creating Report from Subject Area

| Go to New > Analysis | Select a subject area | Drag-and drop columns | Add filters in the selected columns |

Editing & Creating Reports

3. Configure Date Filter

Convert to sql to set up a fixed period

Editing & Creating Reports

Syntax for other time parameters:

•   Greater than the last 14days:"Dates"."Date" >= TIMESTAMPADD(SQL_TSI_DAY, -14, CURRENT_DATE)

•   Greater than the last 2years:"Dates"."Date" >= TIMESTAMPADD(SQL_TSI_YEAR, -2, CURRENT_DATE)

•   Greater than the last 3 months:"Dates"."Date" >= TIMESTAMPADD(SQL_TSI_MONTH, -3, CURRENT_DATE)

•   Greater than the last 1 week:"Dates"."Date" >= TIMESTAMPADD(SQL_TSI_WEEK, -1, CURRENT_DATE)

Editing & Creating Reports

4. Creating Advanced Reports

> Filtering a Report

> Formatting a Report

> Adding Graphs to a Report

> Sorting Reports

> Adding Totals to a Report

Editing & Creating Reports

Dashboard
- Dashboards provide a personalized view of information
- Can consist of one or more pages
- Can include reports, graphs, and prompts (objects)
- Can be accessed from the Catalog or from Dashboard drop-down list

Creating Your Own Dashboards

Global Header > New > Dashboard

Enter Name, Description, Location (My Dashboard or Institution-Shared), Content

Go to Catalog (lower left-hand pane)

Select reports from folders

Click *More > Copy* to copy report to your local institution folder.

Navigate to your local institution folder and select *More > Paste* to paste the report to your local folder.

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Custom Report (1)

Course Code Searched for in Primo

• Selected Columns

Popular Searches

▤ Search String 三▾ ｜ ▨ Course Codes 三▾ ｜ ▤ Searches 三▾

• Criteria

Advanced SQL Filter

((CHAR_LENGTH("Popular Searches"."Search String") = 7) AND (("Popular Searches"."Search String" LIKE '%1%') OR ("Popular Searches"."Search String" LIKE '%2%') OR ("Popular Searches"."Search String" LIKE '%3%') OR ("Popular Searches"."Search String" LIKE '%4%') OR ("Popular Searches"."Search String" LIKE '%5%'))) AND ("Popular Searches"."Search String" NOT LIKE '% %')

Dietetics	dtn1ffu	47
	dtn2pnu	23
Dietetics Total		**70**
Environmental Science	env2egl	70
	env2egw	42
	env2rem	140
	env3egl	27
	env3egw	61
Environmental Science Total		**340**
Genetics	gen2eeg	165
	gen2ege	125
	gen2hmg	11
	gen2mhg	167
	gen3eeg	74
	gen3hmg	208
Genetics Total		**750**
Geology	geo1pro	354
	geo2iss	54
Geology Total		**408**

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Custom Report (2)

Where users are coming from

- Selected Columns

  Sessions
  ▤ Primo View ≣ ▯ Sessions ≣

- Criteria

  ▽ Date is greater than or equal to 07/15/2015
  AND ▽ Sessions is greater than or equal to 20

- Results

Where users are coming from

Primo View	Sessions	Sessions
EXL _ALMA	200	0.0%
TEST_V1	58	0.0%
UnknownView	60	0.0%
Catalogue only computers	8,191	0.3%
Came from "Test Access" page in Alma and from "Find It @ Ex Libris" links in Google Scholar and other databases	265,173	10.1%
Library search	2,332,799	88.7%
Information unavailable	22,483	0.9%
Grand Total	**2,628,964**	**100.0%**

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Custom Report (3)

- Dashboard Daily Snapshot

- Selected columns

  Dates
  ▤ DAYNAME(Date) ≣ ▣ Hidden Col ≣   Action Usage
  ▯ Searches ≣ ▯ Average ≣

- Criteria

  "Dates"."Date" BETWEEN TimeStampAdd(SQL_TSI_DAY,-364,current_date) and current_date

- Results

Average searches per day in the past twelve months

DAYNAME(Date)	Searches	Average
Mon	664,736	12,783
Tue	652,508	12,548
Wed	657,278	12,639
Thu	611,587	11,761
Fri	475,957	9,153
Sat	386,363	7,430
Sun	551,528	10,606
Grand Total	**3,999,957**	**10,989**

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Custom Report (4)

- Device and Browser Usage

- Selected Columns

Device Usage

| Sessions | Actions | Browser Type | Device | Sessions | Actions | Operating System |

- Criteria

Date is greater than or equal to 07/01/2015

- Results

Device	Sessions	Sessions	Actions	Actions
Laptop/PC	2,008,477	95.6%	11,345,033	96.7%
android	28,191	1.3%	121,241	1.0%
blackberry	21	0.0%	74	0.0%
ipad	31,676	1.5%	143,831	1.2%
iphone	32,824	1.6%	115,640	1.0%
ipod	56	0.0%	207	0.0%
wap	5	0.0%	13	0.0%
winphone	579	0.0%	2,395	0.0%
Grand Total	2,101,829	100.0%	11,728,434	100.0%

Browser Type	Sessions	Sessions	Actions	Actions
BlackBerry	18	0.0%	71	0.0%
Chrome	1,137,424	54.1%	6,492,137	55.4%
Chromium	502	0.0%	2,569	0.0%
Epiphany	2	0.0%	11	0.0%
Firefox	353,133	16.8%	1,916,171	16.3%
MSIE	210,740	10.0%	1,344,943	11.5%
Mozilla	16	0.0%	45	0.0%
Netscape	1	0.0%	2	0.0%
Opera	4,918	0.2%	21,197	0.2%
Safari	394,997	18.8%	1,950,967	16.6%
Silk	59	0.0%	235	0.0%
Unknown	19	0.0%	86	0.0%
Grand Total	2,101,829	100.0%	11,728,434	100.0%

Custom Report (5)

- Show "Hot Articles"

- Selected Columns

Dates | Action Usage

| Month (short desc) | Clicked on "Show Hot Articles" | Total Primo Sessions |

- Criteria

Date is greater than or equal to 01/21/2015

- Results

Month (short desc)	Clicked on "Show Hot Articles"	Total Primo Sessions
Jan 2015	132	7,569
Feb 2015	1,186	93,415
Mar 2015	3,446	272,418
Apr 2015	4,210	297,789
May 2015	4,169	510,658
Jun 2015	1,519	218,243
Jul 2015	1,207	166,280
Aug 2015	3,115	417,787
Sep 2015	3,409	450,251
Oct 2015	3,674	467,926
Nov 2015	1,289	168,169
Dec 2015	531	68,752
Jan 2016	700	93,007
Feb 2016	1,095	163,024
Mar 2016	2,964	391,102
Apr 2016	3,702	471,859
May 2016	3,905	488,470
Jun 2016	1,482	215,163
Jul 2016	1,273	204,155
Aug 2016	3,191	490,872
Sep 2016	3,024	488,616
Oct 2016	3,210	508,577
Nov 2016	1,152	181,430
Dec 2016	360	105,598
Jan 2017	12	180,276
Feb 2017	29	264,987
Mar 2017	48	619,026
Grand Total	54,034	8,005,419

More Custom Reports

- Example: Simple vs Advanced Search per year
  - Use the **Action Usage Searches example** built in report
  - Change the Criteria from Month(date) to Year(date)
  - Filter to show only Advanced and Simple search

- Example: A similar report to **Search terms by letter**
  - Use the **Popular Searches Last Month example**
  - Edit the **Search String Formula** using **substring**

- Example: A report on all Pipes that took longer than 1 hour or worked on more than x records
  - Use **Pipes example** report
  - Filter the Total time > 01:00:00
  - Filter the Status for Completed
  - Filter the Records > X

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Scheduling Analytics

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New and Upcoming in Primo Analytics

18-Month Rolling Limit

User Groups

Analytics and REST APIs

User Groups for Primo Analytics Mapping Table

Primo Back Office - Training Server (Demo only)

Primo Home > Advanced Configuration > All Mapping Tables

Home   Deploy & Utilities   General   Local Data   Publishing   FE & Delivery   Search Engine

04/17/17 20:59:13 (Server Time)   About| Logout| Help

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Hello ExlibrisSupport

Mapping Tables

Update for Owner: CUSTOMER   ▼   Sub System :   Back Office   ▼   Table Name :   User Groups for Primo Analytics   ▼   Search in Table:

Delete

Mapping Table Rows

Enabled	User Group Values	User Group Name	USER_GROUP*	Description	Last Updated	
			Select Value ▼			
☑	lstaff,ustaff,hstaff	Staff	USER_GROUP1 ▼	Staff	04/17/17 By ExlibrisSupport	Delete
☑	undergraduate	Undergrad	USER_GROUP2 ▼	Undergrad	04/17/17 By ExlibrisSupport	Delete
☑	hgraduate,bgraduate,ngraduate,lgradu	Graduate Student (Masters)	USER_GROUP3 ▼	Graduate Student (Masters)	04/17/17 By ExlibrisSupport	Delete
☑	lfaculty,ufaculty,hfaculty,bfaculty,tfac	Faculty	USER_GROUP4 ▼	Faculty	04/17/17 By ExlibrisSupport	Delete

Table Description: Define user groups that will be included in Primo Analytics reports.

Create a New Mapping Row

User Group Values	User Group Name	USER_GROUP	Description		
		Select Value ▼		Export To Excel	Save

Cancel & Go back
To Mapping Table List

Add up to 8 user groups → Starts counting once user groups added → Values in Mapping Table come from ILS

Next Steps and Support Resources

Knowledge Center	• Technical Seminar Presentations (located in the Cross-Product section of the CKC) • Product Documentation
Additional information on analytics report	• Idea Exchange • Common Primo Analytics Procedures • Can Google Analytics be Implemented in Primo? • Community Reports in Primo Analytics
Additional support resources within the ExLibris Ecosystem	• System Status Pages Single Tenant ENV / Multi-Tenant ENV • Developer Network

Q & A

Any Questions?

Session Survey Evaluation

Please use the following link
https://www.surveymonkey.com/r/techsem2017
to provide feedback on your sessions.

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