

## Primo VE Analytics

### Introduction

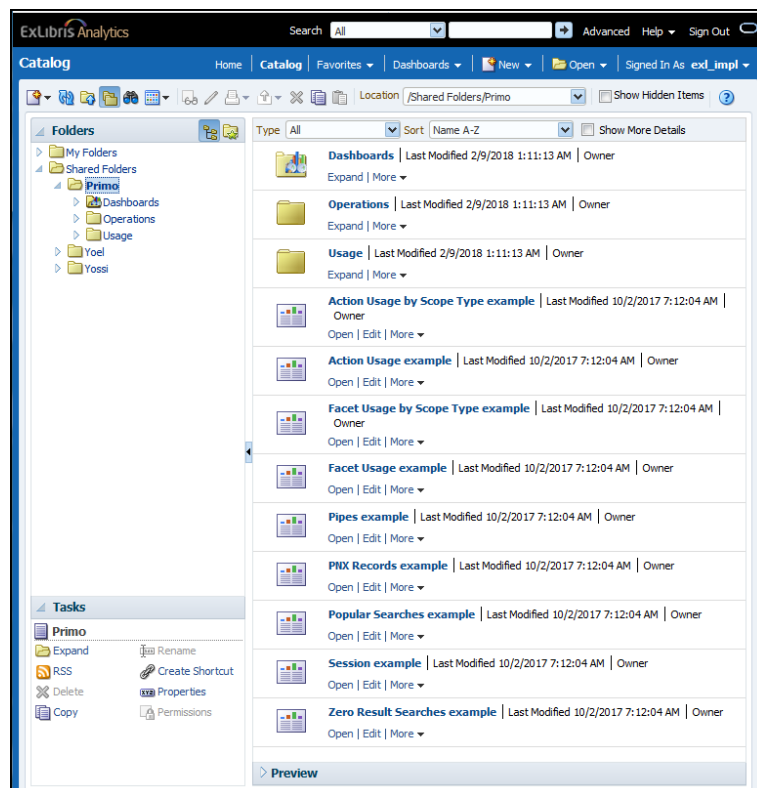
Primo Analytics enables customers to run reports on patron activities performed in the UI. You can use out-of-the-box reports that are provided by Ex Libris, or you can create your own reports. Groups of reports can be displayed in dashboards that you customize. You can share reports and dashboards that you create with other Primo users in your institution or in other institutions. These reports help you to understand patron activities and to make informed decisions on how to improve services. For more details regarding Analytics, see [Primo Analytics](#).

For details regarding Alma Analytics, which is used to report library operations, see [Alma Analytics](#).

### Creating Analytics Reports and Dashboards for Primo VE

Primo Analytics is built on Oracle Business Intelligence Enterprise Edition 11.1.1.9, which allows you to create, run, and view reports/dashboards. Primo VE utilizes the same interface as Primo except for the operations activities, which are not applicable to Primo VE. For a thorough description of all the activities available in Oracle BI, click the **Help** button to view the online help and Oracle documentation, or refer to the Oracle® Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1): [http://docs.oracle.com/cd/E21764\\_01/bi.1111/e10544/toc.htm](http://docs.oracle.com/cd/E21764_01/bi.1111/e10544/toc.htm).

To access Oracle BI, click **Analytics > Analytics > Design Analytics (Primo)**.



Oracle BI for Primo VE

For information on how create reports and dashboards, see the following documents, respectively:

- [Creating a Report](#) - (**New > Analysis**)
- [Creating a Dashboard](#) - (**New > Dashboard**)

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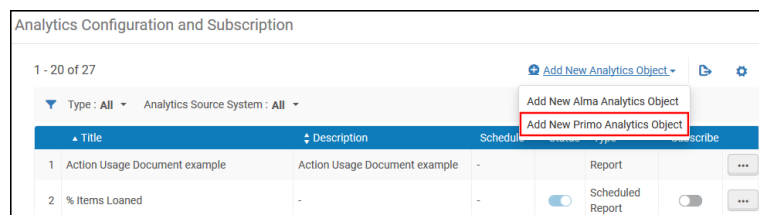
## Configuring Analytics Objects

The Analytics and Configuration page (**Analytics > Analytics Objects > Analytics Objects Lists**) allows you to schedule Primo VE Analytics reports and dashboards to run at specific times and have them emailed to subscribed users. You can also create links to reports and dashboards that can be accessed in Primo VE by users with specific roles.

For more details on adding analytics objects, see [Running Analytics Reports and Displaying Them in Alma](#). The Widget type is not support in Primo VE Analytics.

### To add a scheduled report/dashboard:

1. Open the Analytics and Configuration page (**Analytics > Analytics Objects > Analytics Objects Lists**).



**Analytics Configuration and Subscription (Administrator Page)**

2. Click **Add New Primo Analytics Object** from the **Add New Analytics Object** drop-down list.

The screenshot shows the 'Primo Analytics Object' form. At the top, there's a header with a back arrow, 'Primo Analytics Object', and 'Cancel' and 'Save' buttons. Below the header is a form with two main sections: 'General Information' and 'Roles'. The 'General Information' section contains fields for Title, Analytic Folder, Name, Type (set to 'Scheduled Report'), Description, Format (set to 'PDF'), Status (set to 'Active'), and Schedule (set to 'Not scheduled'). The 'Roles' section is currently empty, showing 'No records were found.' and an 'Add Role' button.

**Add Primo Analytics Object**

3. Fill out the form. For more information, see [Analytics Configuration Fields](#).
4. Click **Save**.

# Subscribing to Scheduled Reports and Dashboards

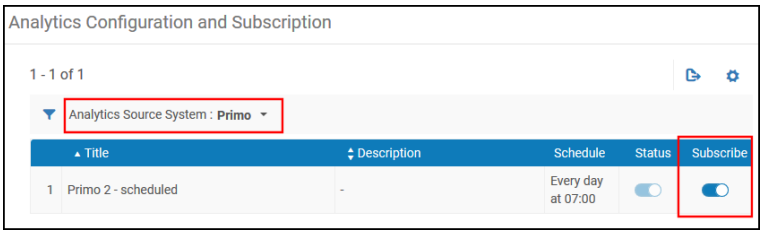
Staff users who are assigned any of the roles specified in the scheduled report/dashboard may use the Analytics Configuration and Subscription page ([Analytics > Analytics > Subscribe to Analytics](#)) to subscribe to a scheduled report/dashboard.

**Note**

Administrators can also add and delete subscriptions for staff users who do not have the required permissions to subscribe themselves. For more information, see [Managing Subscriptions to Scheduled Reports and Dashboards](#).

## To subscribe to a scheduled report/dashboard:

1. Open the Analytics and Configuration page ([Analytics > Analytics > Subscribe to Analytics](#)).



Analytics Configuration and Subscription (Subscriber Page)

2. Select the **Primo** filter from the **Analytics Source System** drop-down list.
3. In the row of the report/dashboard to which you want to subscribe, enable the slider in the **Subscribe** column.