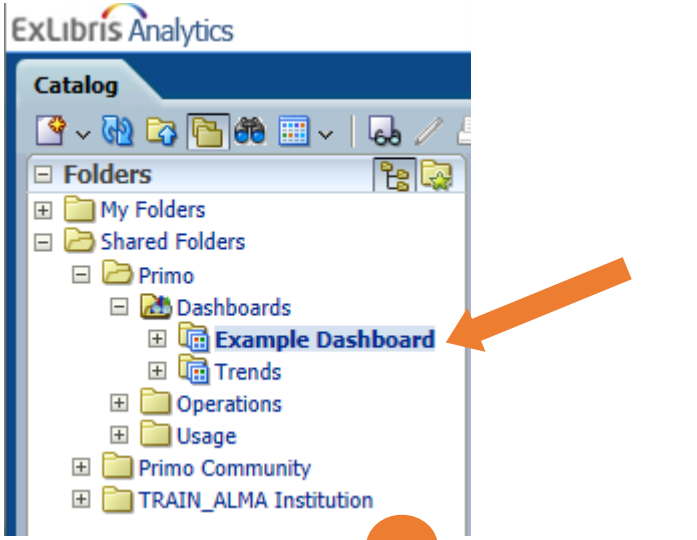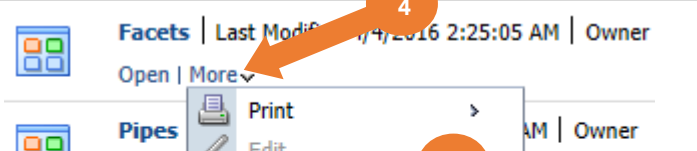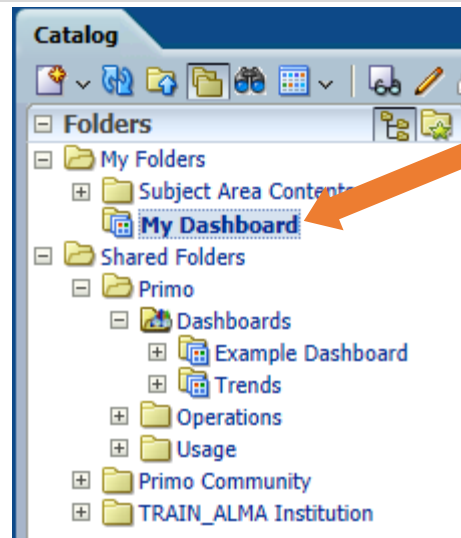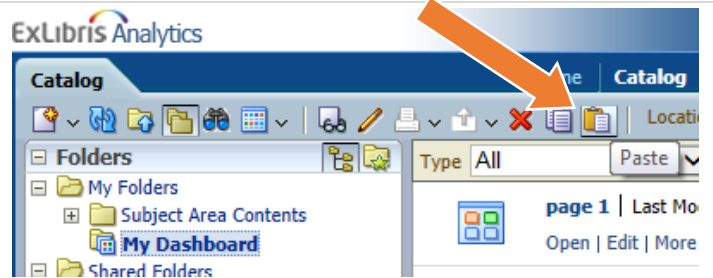# Primo and Primo VE Analytics and Dashboards Exercises

Exercise #1 – Adding an Analysis to *My Dashboard* and labeling it

Access Primo Analytics (Primo VE in Alma)	Access Primo Analytics (Primo Back Office)
Go to Alma > Analytics > Design Analytics (Primo)	Go to Primo Back Office > Primo Analytics
Add an Analysis to *My Dashboard*	
1. Note that you are in the *Catalog* tab.	
2. In the left hand *Folders* pane navigate to the *Primo/Dashboards/Example Dashboard* directory	
3. In the center pane click *More* under the *Facets* report	
4. Select *Copy*	

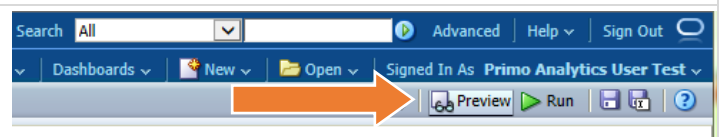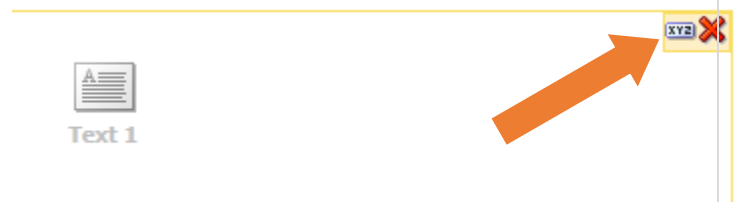|	
5. **Navigate to *My Dashboard* folder**	
6. **Select paste icon (clipboard w/document)**	
Add a text description to the report	
7. **Click Edit to modify the report**	
8. **Click preview to see report (you can close the popup window after previewing)**	
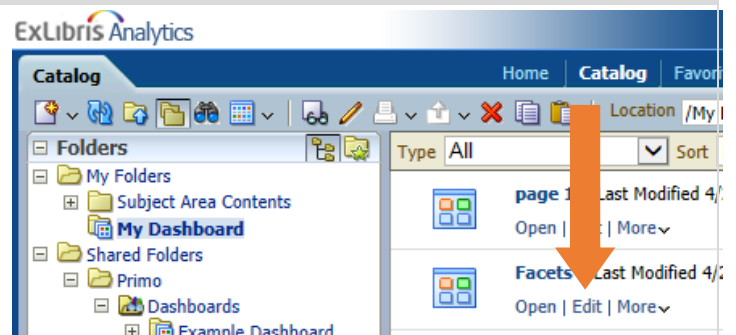
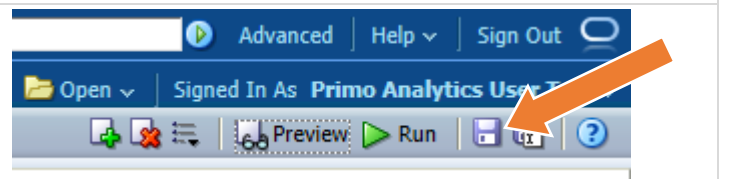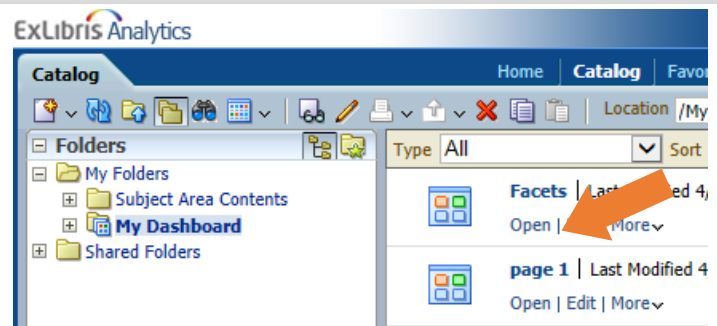|	
9. **Add a text field by dragging and dropping *Text* from the *Dashboard Objects* pane.** **Position the Text so that the blue bar is above the Column Selector Facets box.**	**My Dashboard** page 1 **Facets** **☐ Dashboard Objects** ▯▯ Column ▤▯ Section 🔔 Alert Section 🕸 Action Link 🕸 Action Link Menu 🖼 Link or Image ▤ Embedded Content A≣ Text 📁 Folder Column 1 Section 1 ▤ Text [ab] Column Selector Facets
10. **Mouse over the Text 1 box and click the *XYZ* button to edit.**	A≣ Text 1
11. **In the popup window, enter text to describe the report, then click OK** *Monthly report of the number of times specific facets were used*	**Text Properties** Enter text and formatting tags below to include on your Dashboard. **B** *i* u Line Break ☐ Contains HTML Markup Monthly report of the number of times specific facets were used Preview Help OK Cancel
12. **Save and preview.**	🔵 Advanced Help ∨ Sign Out ⊖ 📁 Open ∨ | Signed In As **Primo Analytics User** ➕ ✖ ≡ | Preview ▷ Run | 💾 ⫼ ❓
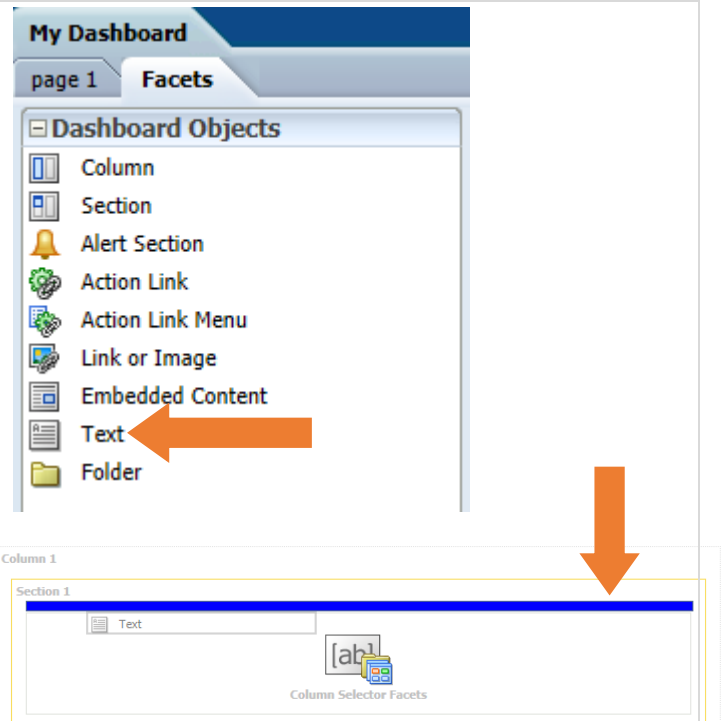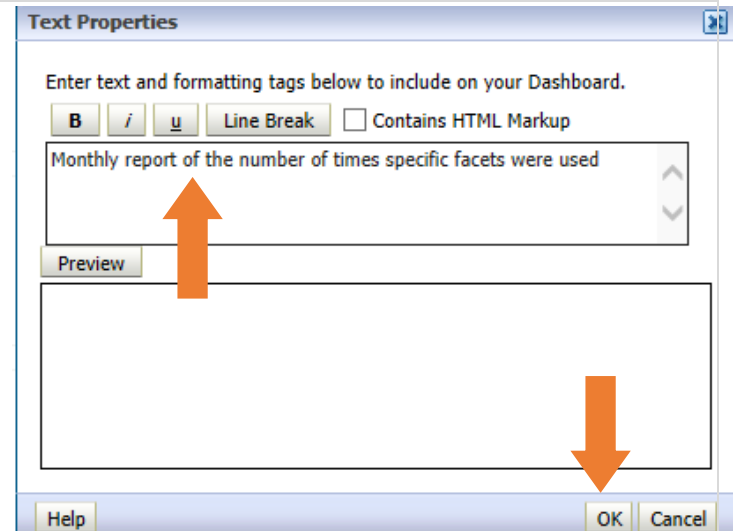
#2 – Editing a Copied Analysis

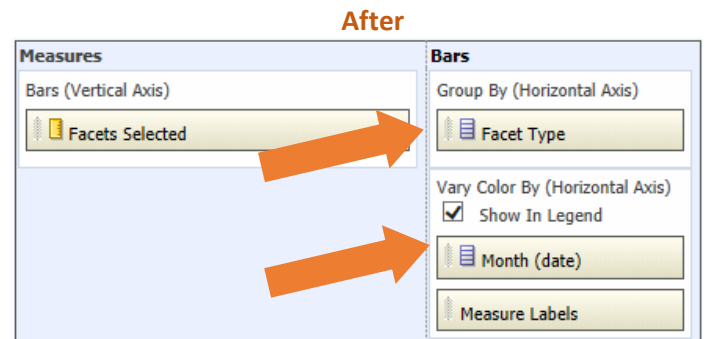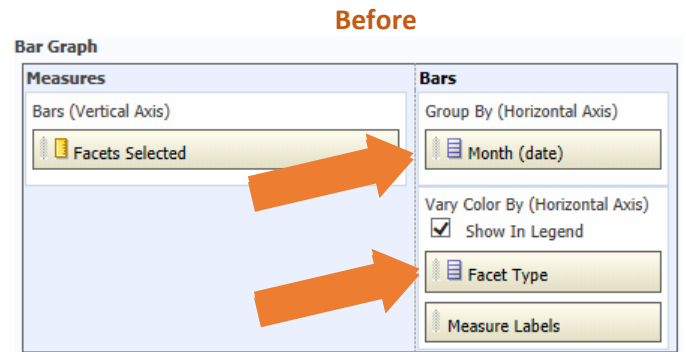|		
Edit the Analysis		
13.	**Open the *Facets* report on *My Dashboard* via the Catalog/Folders pane**	
14.	**Click on the *Page Options* icon**	
15.	**Click *Edit dashboard***	
16.	**Mouse over the *Facet Usage example* box and click the *XYZ* button…**	
17.	**… then select *Edit Analysis***	
18.	**Edit the graph by selecting the pencil icon**	
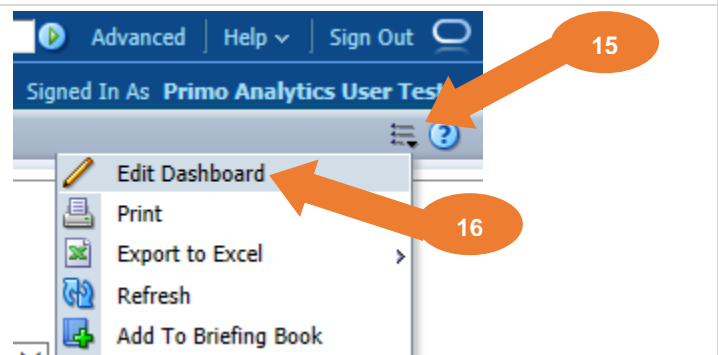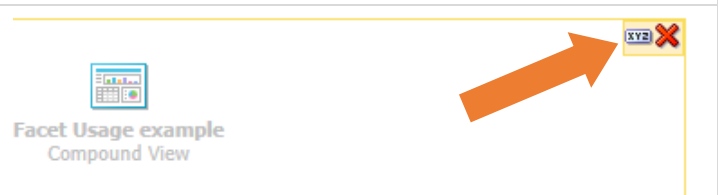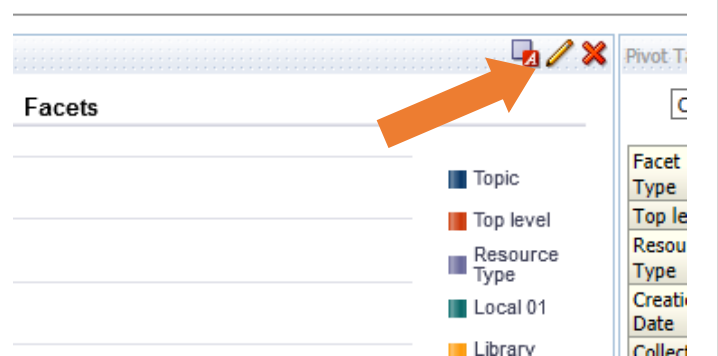
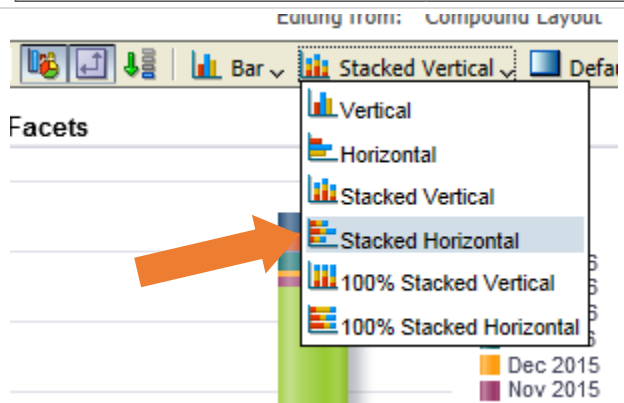|	
19. In the *Layout Pane* in the *Bar Graph* section, click and hold the *Facet Type* box and drag it up to land under the *Month (date)* in the *Group By* area. 20. Next click and hold the *Month (date)* box and drag it down to land above the *Measure Labels* box in the *Vary Color By* area You can tell where the box will 'land' when you see a blue bar. Note that the graph above changes to reflect the modifications you just made.	**Before** **After**
21. In the top pane, change type of graph to *Stacked Horizontal*	
22. Click *Done,* or use *Revert* to undo changes if needed.	
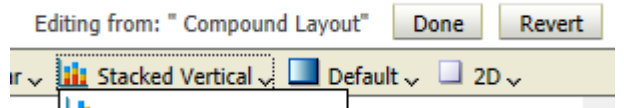
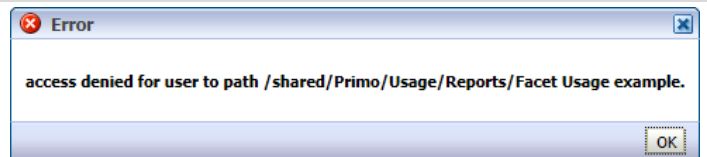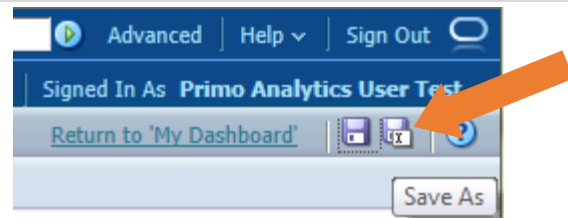## Save the Analysis

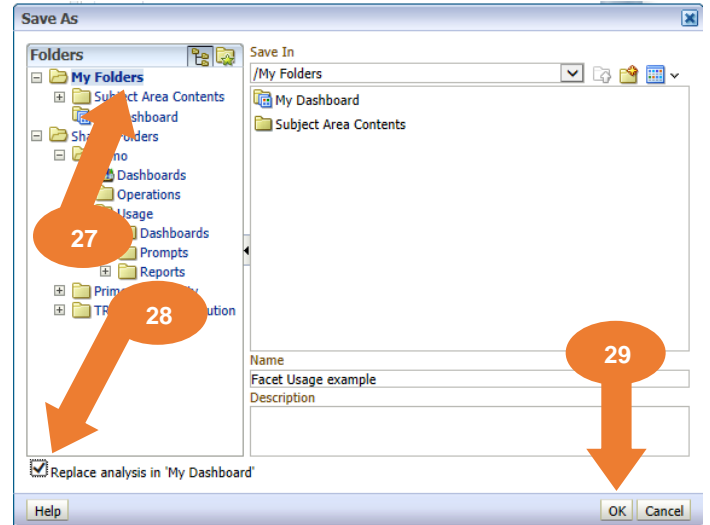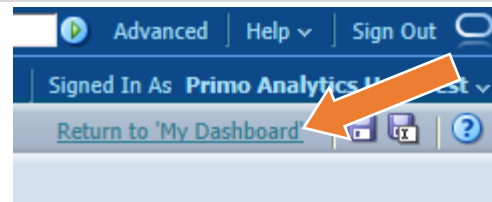|	
23. Try *Save Analysis*	
24. Note that the analysis is still coming from the shared, and it won't let you save it there.	Error ⊗ access denied for user to path /shared/Primo/Usage/Reports/Facet Usage example. OK
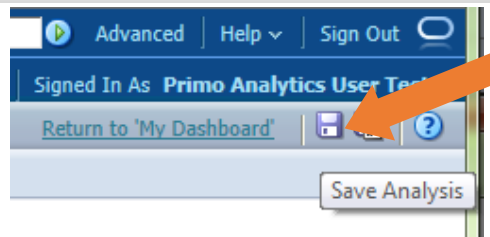
25. Click *Save As*	

26. Select My Folders to save your Analysis there. **27. Check the Replace analysis in 'My Dashboard' box.** **28. Click OK**	

29. Return to My Dashboard	

30. See the finished Report on the Facets Tab:

Monthly report of the number of times specific facets were used

Facet Type	May 2015	Jun 2015	Jul 2015	Sep 2015	Oct 2015	Nov 2015	Dec 2015	Jan 2016	Feb 2016	Mar 2016	Apr 2016
Top level	39	18	2	9	66	5	2	8	1	8	8
Resource Type	4	3		2	22	2	1	1		1	9
Creation Date		30									
Collection				5	6	2	1			2	9
Topic	3			2	2	2		1		2	3
Library					1	2				3	4
Author											2
LCC						2					
Language								1			1
Local 01			1								1
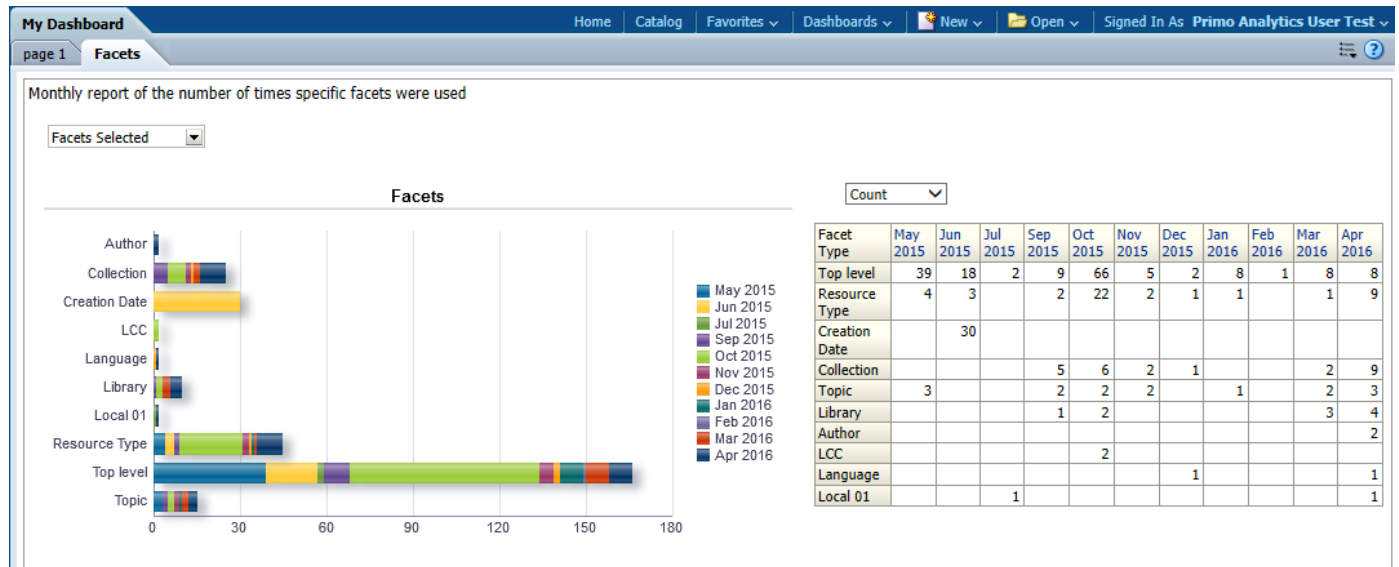
#3 – Creating a New Analysis

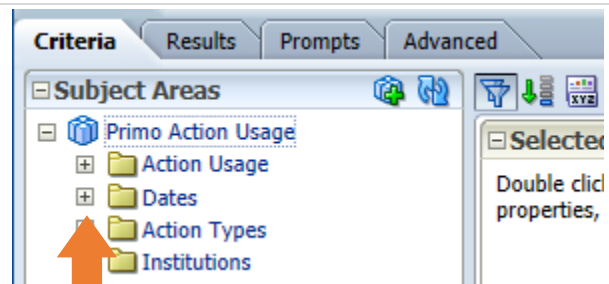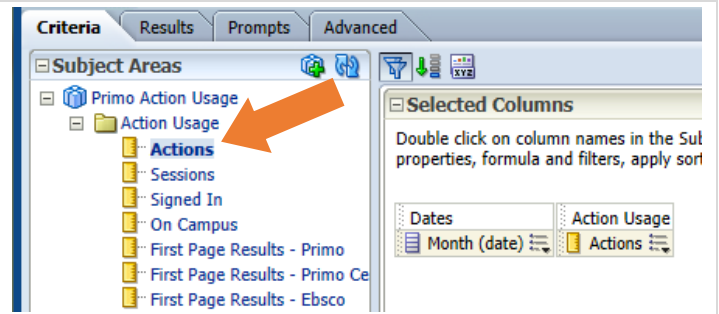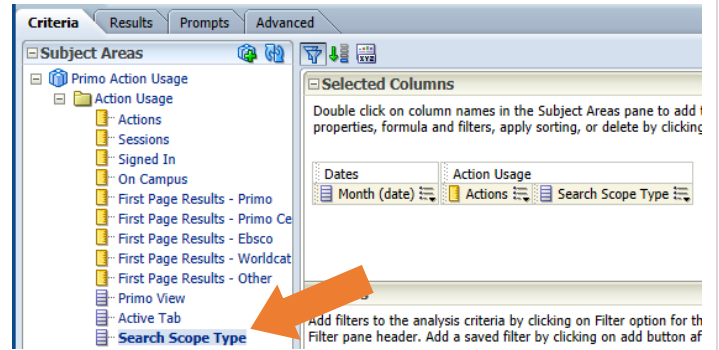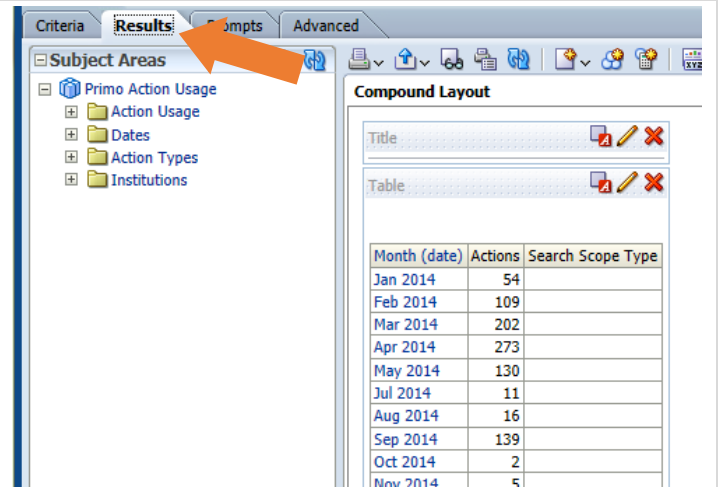| Create a New Analysis	
31. In the header select *New* **32. then** *Analysis*	
33. *Select Primo Action Usage as the Subject Area*	
34. In the *Criteria* **tab in the** *Subject Areas* **pane, expand the** *Action Usage* **and** *Dates* **folders by clicking on the plus sign to the left of the folder icon**	
35. In the *Dates* **folder, click and drag** *Month (date)* **into the** *Selected Columns* **box.** **Note that the blue bar will show you where the metric will be placed.**	
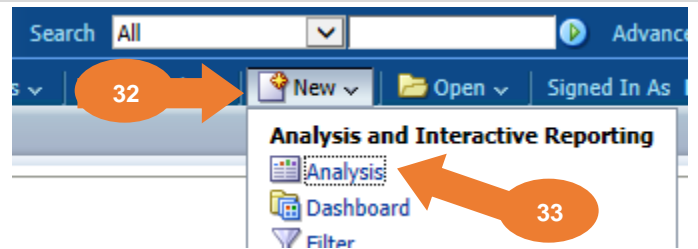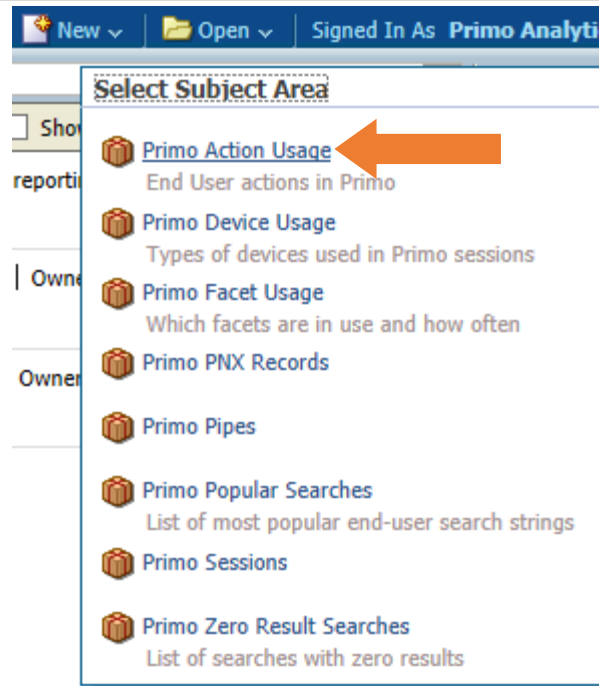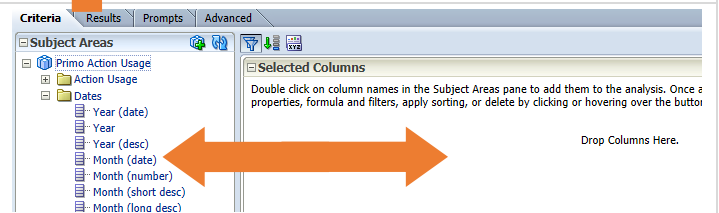
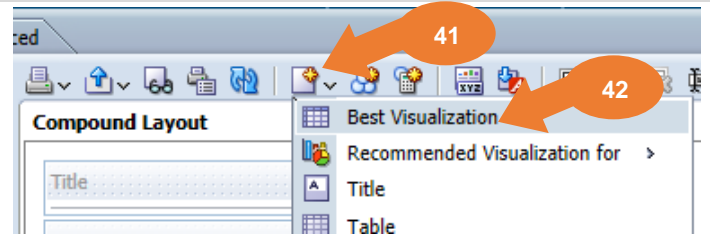|	
36. In the *Action Usage* folder click and drag *Actions* into the *Selected Columns* box and place it to the right of the *Month (date)* metric	
37. In the *Action Usage* folder click and drag *Search Scope Type* into the *Selected Columns* box and place it to the right of the *Action Usage* metric	
38. Click on the *Results* tab	
39. Click just above the header of the *Search Scope Type* column and drag and drop it in between the *Month (date)* and *Actions* columns	
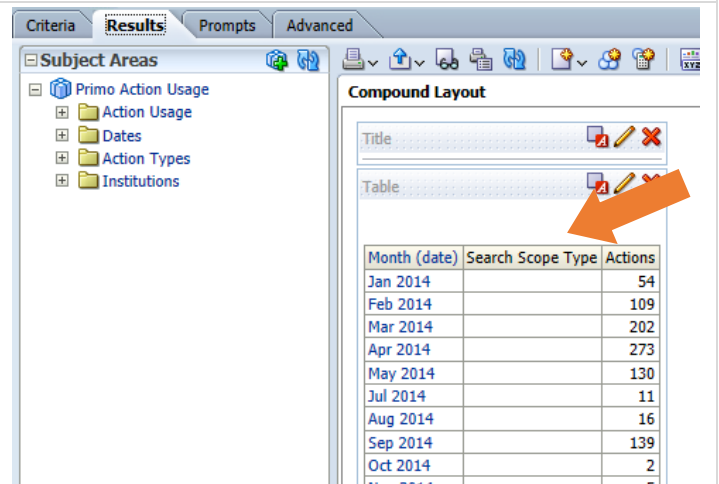
Add a Graph to the Analysis

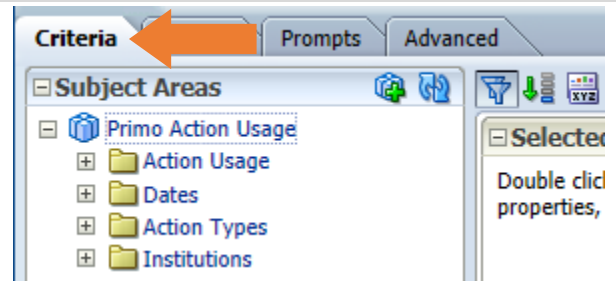|	
40. In the *Results* tab, click on the *New View* icon 41. then select *Best Visualization*	
42. Scroll down to see the graph	

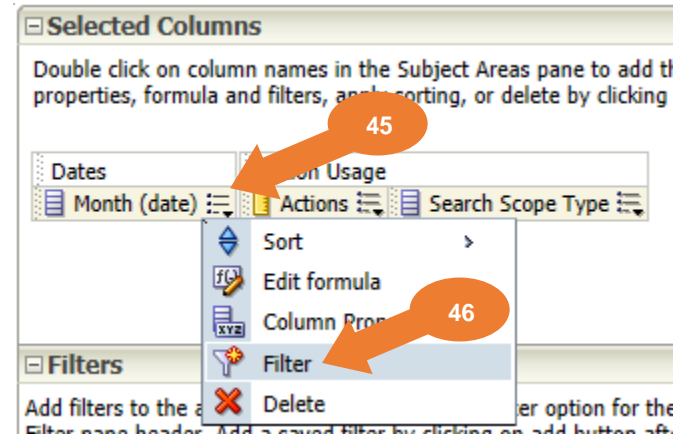## Apply a Filter to the Date

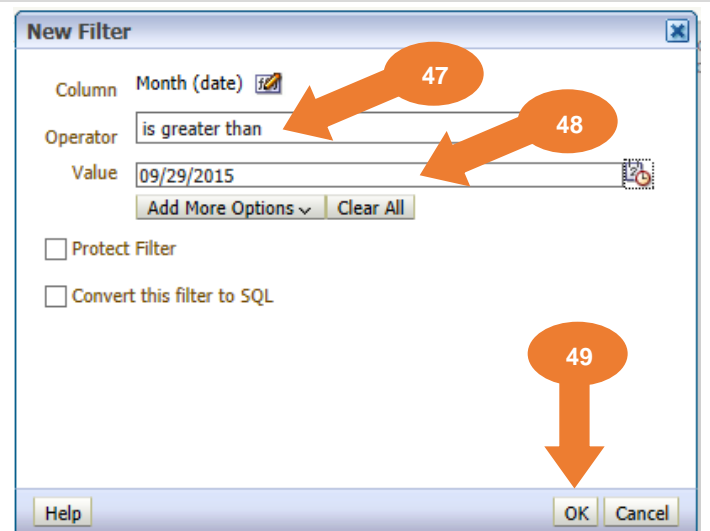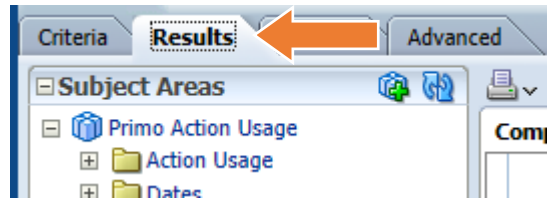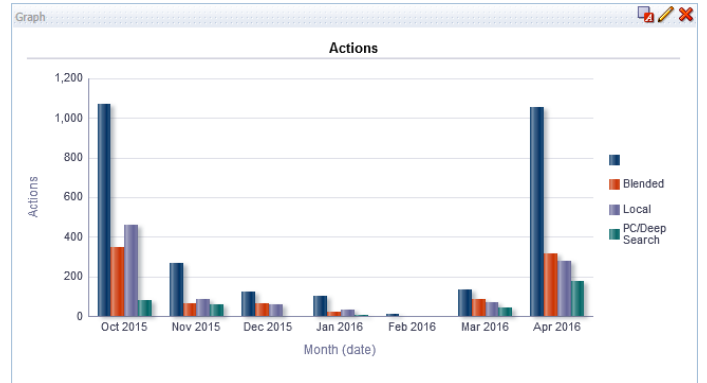|	
43. Click on the *Criteria* tab	
44. Click on the *Properties* icon 45. then select *Filter*	
46. Set the *Operator* to *is greater than* 47. Set the *Value* to *1/01/2019* (using the calendar icon) 48. Click OK.	

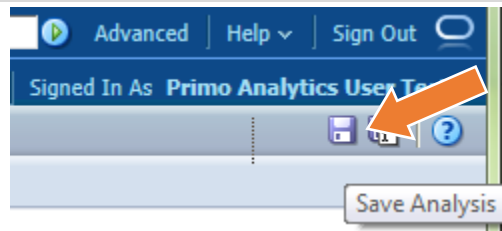|	
49. Click on the *Results* tab	
50. Now we can see the data better in the graph	

Save the Analysis

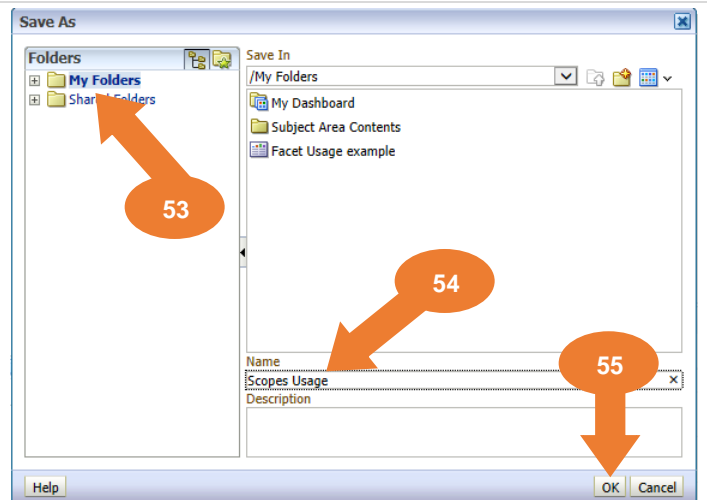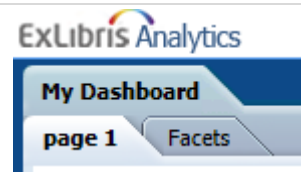|	
51. Click *Save Analysis*	
52. Click on *My Folders* to ensure it is selected **53. Name the new analysis *Scopes Usage*** **54. Click OK**	

Add the New Report to My Dashboard
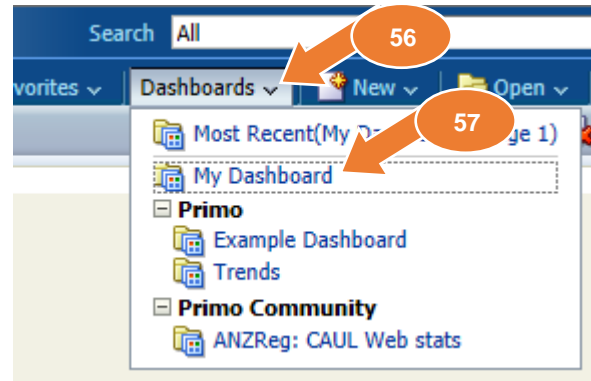
55. Go to *Dashboards* in the header 56. Then select *My Dashboard*	
57. Note that you are brought to *Page 1*	
58. Click *Edit* to modify the page	
59. In the *Catalog* pane select the *Scope Usage* report and drag and drop it into the center pane.	
60. *Preview* 61. *Save*	