

Introduction to Primo Analytics and New UI

Contact: Maria McShane, Pacific University, maria.mcshane@pacificu.edu

From: 08/09/2017 Systems Open Call

In Primo NUI Manual:

(<https://docs.google.com/document/d/1NvzBYUGGKvNzAiDjqHZ1DluGbe63Z2JJNhnqfRvWSpQ/edit?usp=sharing>)

General Background

The Primo Back Office (PBO) provides two ways to pull reporting data from Primo - Primo Reports and Primo Analytics. Both require a login/password to the PBO with the role of Reporting.

Creating a Staff User Account

Navigate to: PBO > Deploy & Utilities > Manage Staff

In the Create a New Staff Member section:

- Complete the login, display name, password, and confirm password fields.
- Choose **Reporting** in the Role drop-down.
- Click Create.

The PBO provides access to Analytics and Reports for users with a Reporting role.



Orbis Cascade Alliance - Primo Production Environment

Welcome to Primo Back Office - monitor and configure your settings

Monitoring & Maintenance

- > **Primo Analytics**
View and Design reports
- > **Schedule Primo Analytics**
Schedule reports and dashboards
- > **Primo Reports**
View available reports or catalog a new report

Primo Reports

Primo Reports uses a BIRT (Business Intelligence and Reporting) Report Viewer to deliver canned and configurable reports. There are two report sections - List Reports (canned) and Statistical Reports (configurable).

Orbis Cascade Alliance - Primo Production Environment

[Primo Home](#) > [Primo Reports](#)

> Primo Reports

List Reports

- > [Data Sources](#)
- > [IPs](#)
- > [Institutions](#)
- > [Normalization Sets](#)
- > [Pipes](#)
- > [Restrictions](#)
- > [Scopes](#)
- > [Staff Users](#)
- > [Top Searches based on Processing Time](#)
- > [Top Searches with No Results](#)
- > [Views](#)

Statistical Reports

- > [Browse String Statistics](#)
- > [Click Through Statistics](#)
- > [Hourly Remote Statistics](#)
- > [Hourly Search Statistics](#)
- > [PNX Click Statistics](#)
- > [PNX Statistics](#)
- > [Search Statistics](#)
- > [Search Strings Statistics](#)
- > [System Monitoring](#)
- > [Users Personal Sets Report](#)
- > [\[NEW\] Annual Event Statistics](#)
- > [\[NEW\] Annual Search Statistics](#)
- > [\[NEW\] Click Events](#)
- > [\[NEW\] Daily Search Statistics](#)
- > [\[NEW\] Facet Clicks](#)
- > [\[NEW\] Search Statistics](#)
- > [\[NEW\] Search Terms by Letter](#)
- > [\[NEW\] Top Search Terms](#)

List Reports are mostly informational, providing static data on the configuration of Primo.

Statistical Reports provide information on user activity, such as searches, clicks, and facet choices. These reports can be customized by choosing criteria in the parameters modal screen. The report may include information in different formats, such as spreadsheets and charts.

Primo Analytics

Primo Analytics through an Oracle OBIEE interface (similar to Alma Analytics). Analyses, prompts, and dashboards can be created, stored, and shared.

The **Catalog** provides sections to store and share analyses:

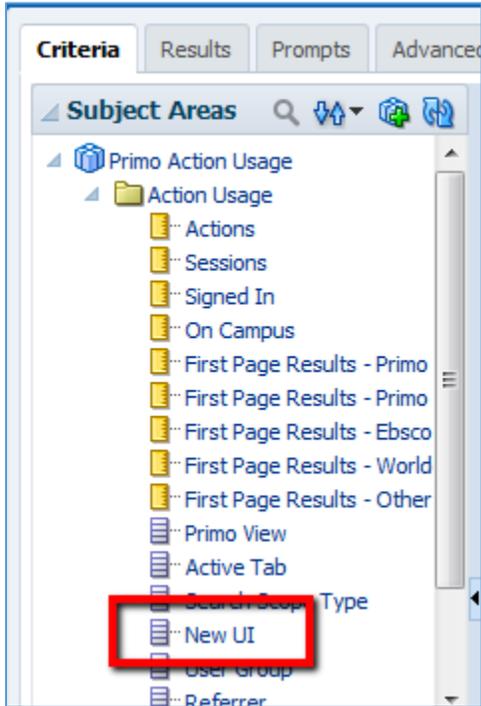
- Users - My Folders
- ExLibris - Shared Folders > Primo
- Community - Shared Folders > Primo Community
- Institution - Shared Folders > Primo [your institution's name]

The Analysis **Subject Areas** cover:

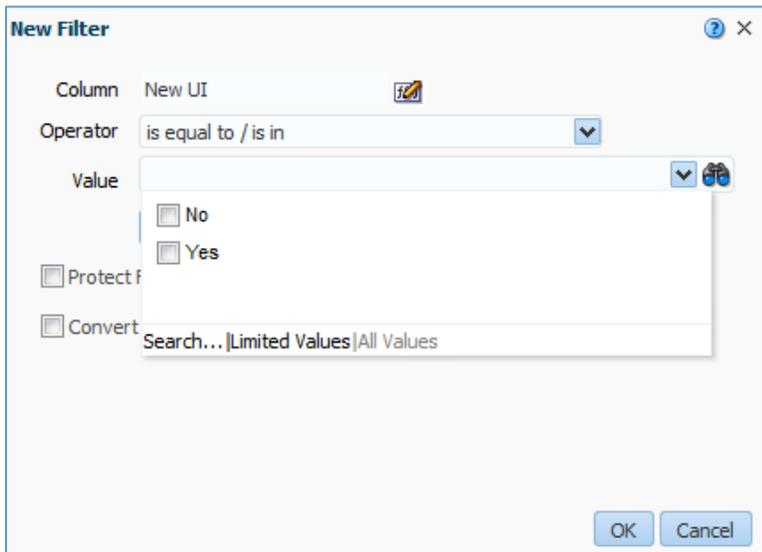
- Primo Action Usage - includes NUI
- Primo Device Usage - includes NUI
- Primo Facet Usage - includes NUI
- Primo PNX Records
- Primo Pipes

- Primo Popular Searches
- Primo Sessions - **includes NUI**
- Primo Zero Result Searches

The four areas above provide a **New UI** description field in the top folder.



The field value options are **Yes/No**. Include this field to compare Classic and New UI results or to filter for one interface.



Possible Reasons to Use the NUI field:

- Determine if users are opting to bypass NUI and use the Classic during transition/beta testing (if offering both).
- Compare Classic to NUI:
 - Determine if user actions are significantly different based on time (time of day, time of year, etc).
 - Determine if device usage is significantly different.
 - Determine if users are discovering resources faster.
 - Determine if facets are used more or less.
 - Determine if users are spending more or less time in Primo.

Schedule Primo Analytics

You can schedule analyses and dashboards (similar to Alma). Click on the **Create a New Schedule** button (bottom-right). Enter the required fields and click Save.

Note: The Analytics Folder drop-down will only populate with folders that include analyses and/or dashboards. For example, your institution's Reports folder won't appear until there is at least one analysis saved in that folder.