PRIMO VE ANALYTICS

SUNY Library Shared Services
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The State University of New York

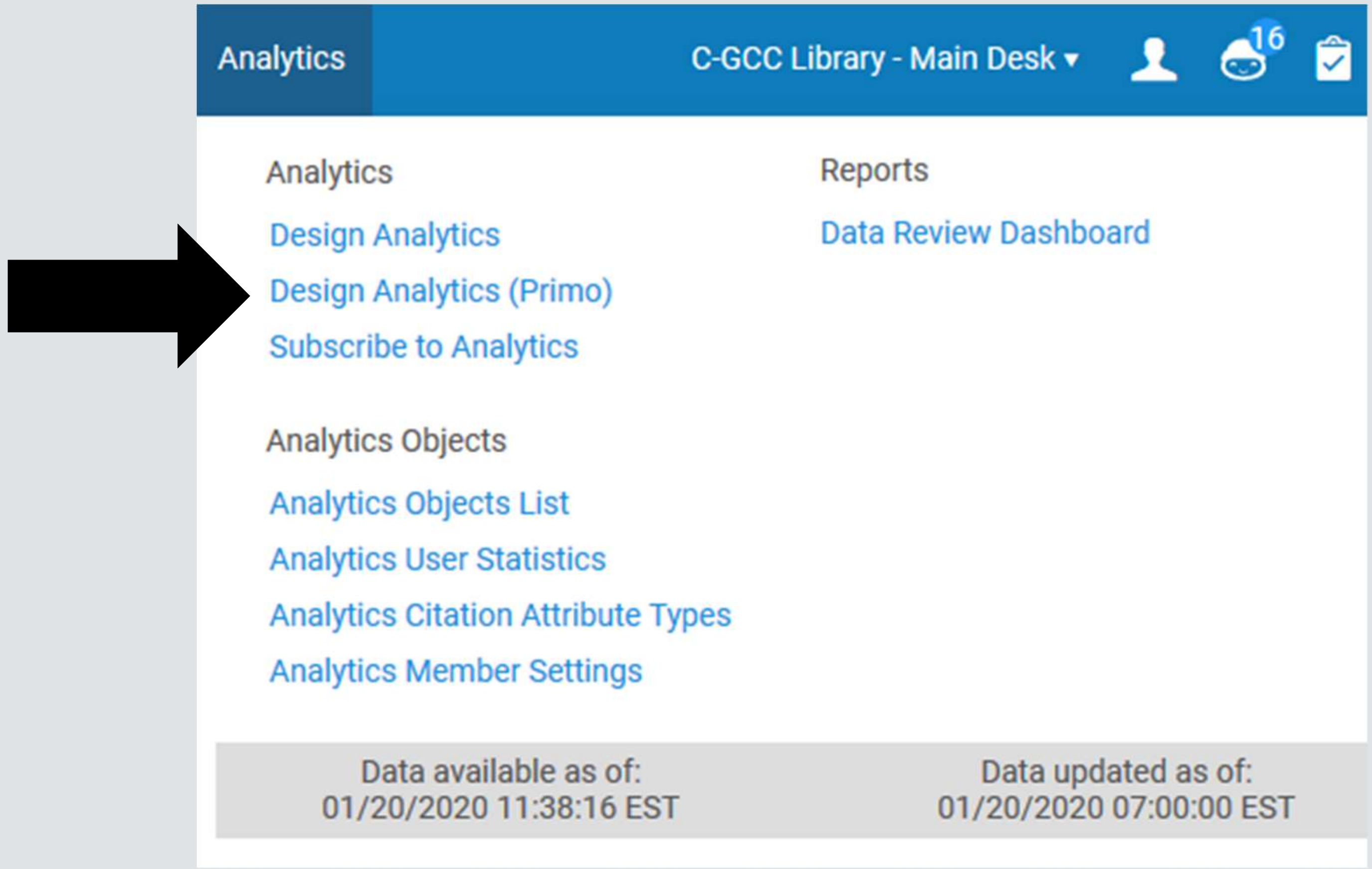
Today's Agenda

- Understand the structure of Primo VE Analytics
- Open and modify OOTB (out of the box) reports
- Create a new report
- Tips and tricks

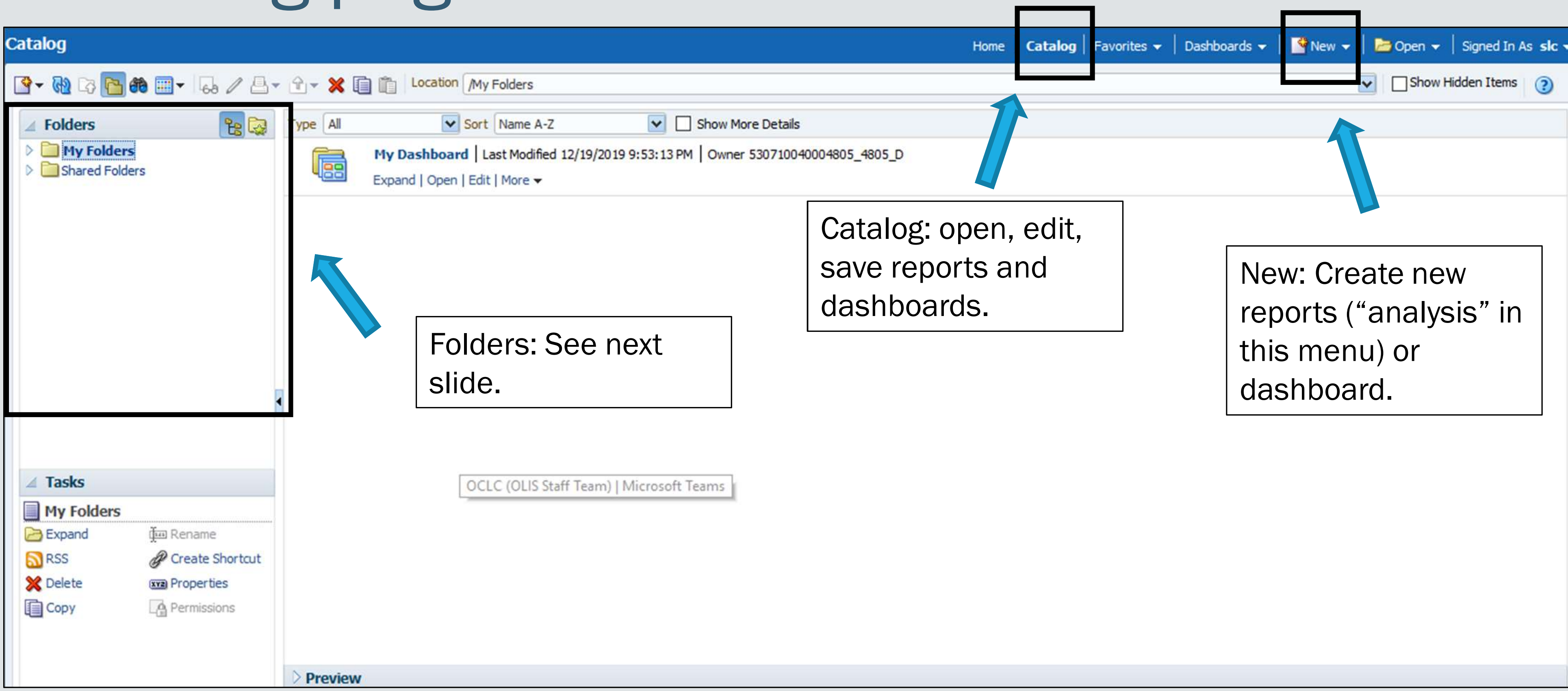
Primo VE Analytics

- Primo Analytics enables libraries to create reports on Primo discovery activities, such as
  - *Terms that users search*
  - *What facets are used*
  - *What devices are used to access Primo*
  - *Overall number of searches*
  - *Etc.*
- Permissions needed:
  - *Designs Analytics*

Accessing Primo Analytics



Landing page



Folders: See next slide.

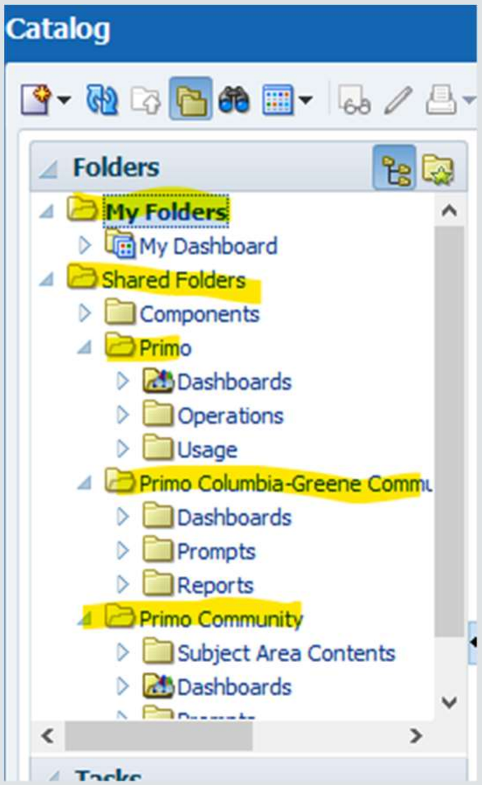
Catalog: open, edit, save reports and dashboards.

New: Create new reports ("analysis" in this menu) or dashboard.

Navigation pane: contains folders

Main pane: Either empty or will contain the contents of whatever folder you selected in the navigation pane.

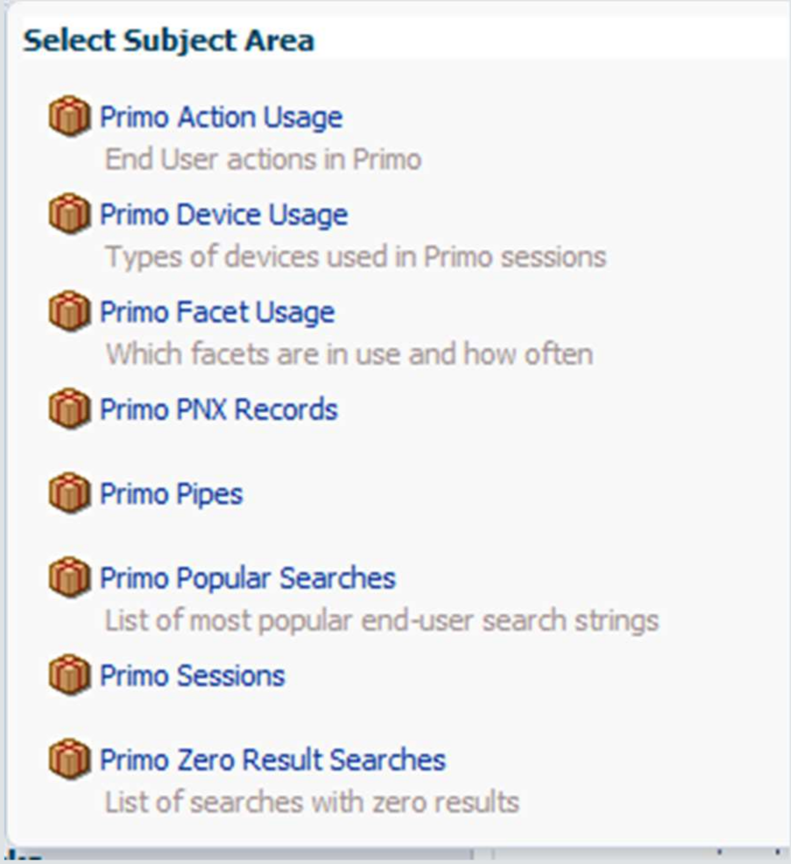
Folder structure



- My Folders: Reports and dashboards that only you (the user logged in to Alma) can see and access.
- Shared Folder: Primo: Out-of-the-box reports supplied by Ex Libris. You can edit reports from this directory, but must save them in another directory (you cannot save to this shared folder). If you want to edit these reports they should first be copied to another folder.
- Shared Folder: Your Institution (will display the name of your campus): a folder viewable only by users from your institution. You need to save reports or dashboards here if you want to create analytics objects from them, email them, schedule them, etc.
- Primo Community: Reports and Dashboards saved here can be viewed by all other Alma/Primo institutions.

Subject Areas

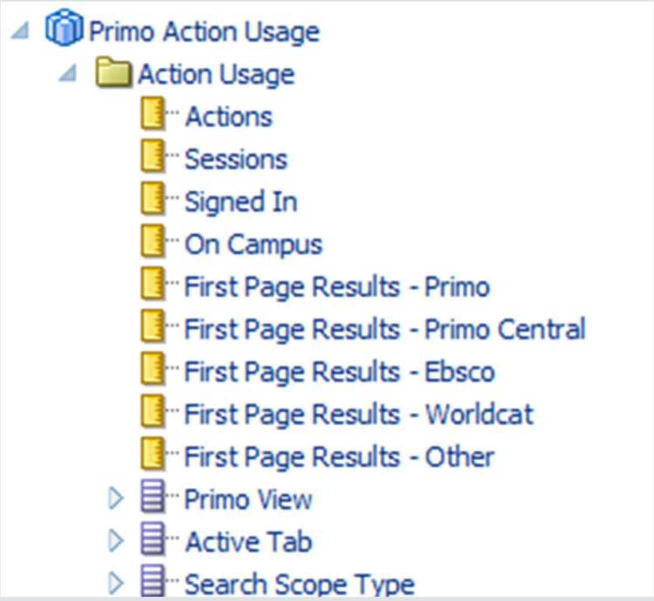
- Just like Alma Analytics, data in Primo VE Analytics is organized into Subject Areas.
- When you create a new report, you must first select which Subject Area you want the data to come from.
- Advanced reports combine data from multiple Subject Areas, as long as the data is connected in some way.

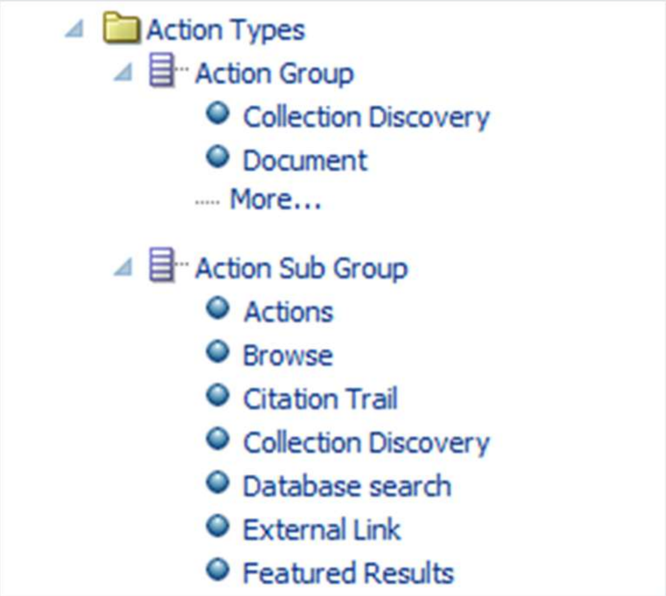


https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Primo/Analytics/Primo_Analytics_Subject_Areas

Action Usage Subject Area

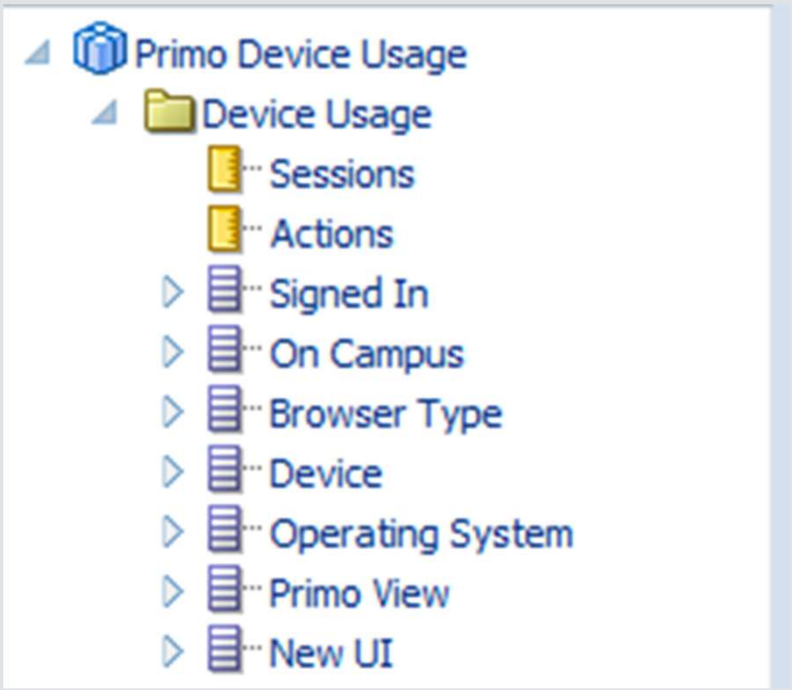
Action usage shows how users interact with Primo functionality, such as searching, using citation tools, clicking on various links, emailing, etc.



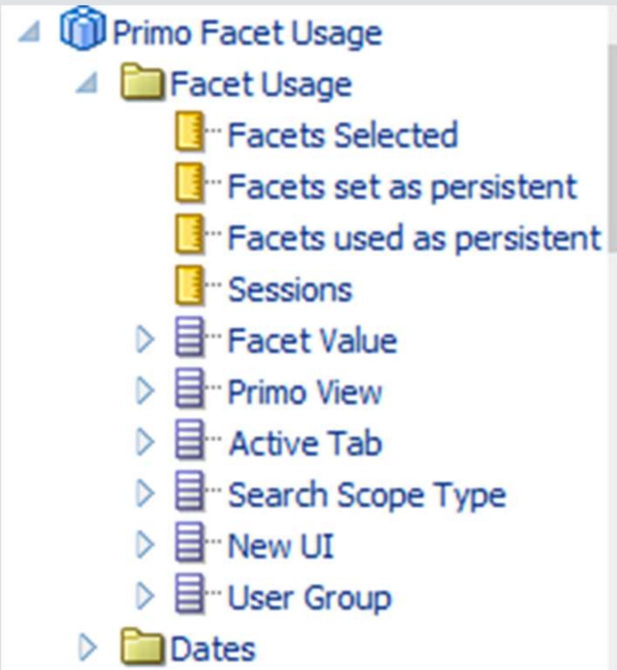


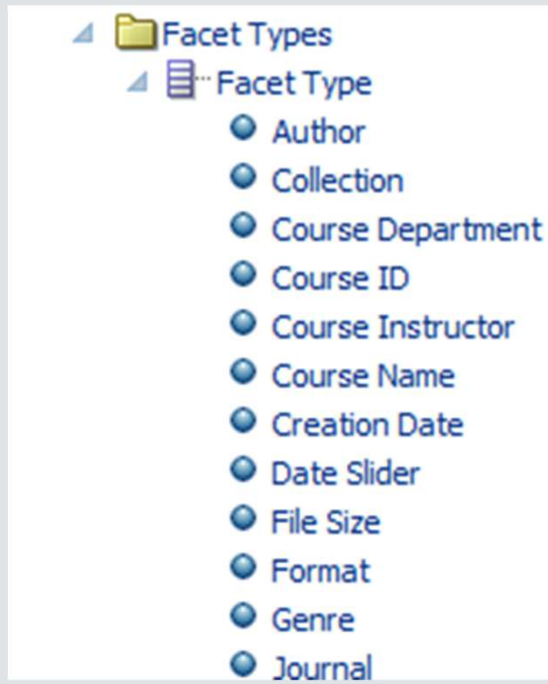
Device Usage Subject Area

Device Usage shows the number of actions and sessions that occur on each device type (laptop, smartphone, tablet, Mac, PC, etc)



Facet Usage Subject Area





Facet Usage shows which facets users selected.

Pipes Subject Area

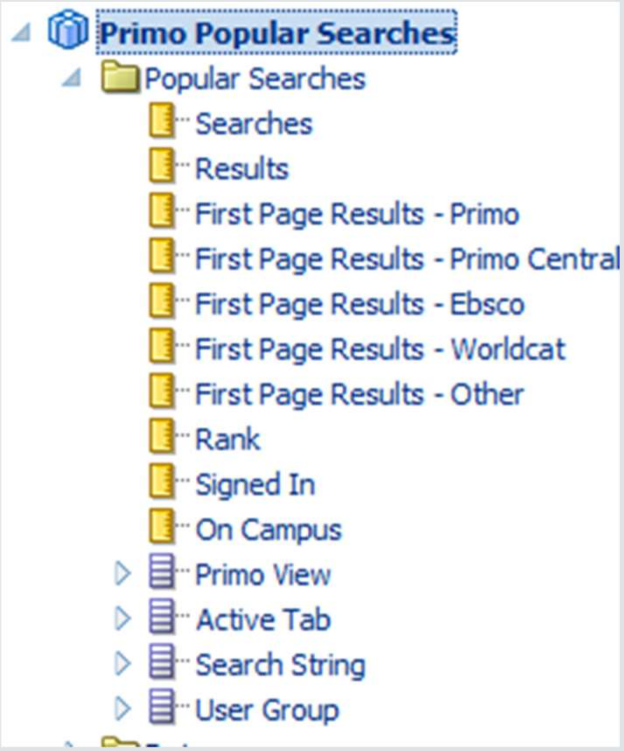
- Pipes contains fields used to create reports associated with pipes.
- The pipe is the set of steps that the source records go through before being turned into the PNX record.
- This is not applicable to Primo VE customers (like us!) so we won't discuss it in this presentation.

PNX Record Subject Area

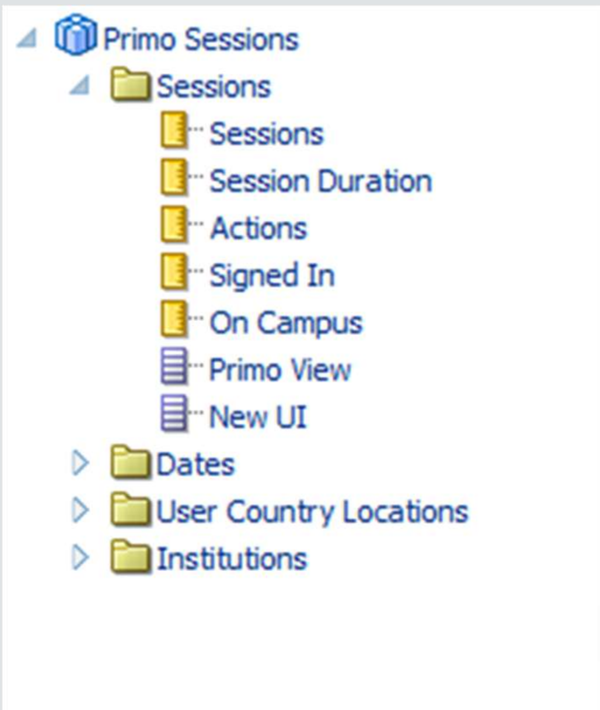
- PNX Records subject area contains many fields used to create reports associated with PNX records.
- This is also not applicable to Primo VE, so we won't discuss it.

Popular Searches Subject Area

- Popular Searches show what terms users are searching.
- According to the documentation: “Popular searches are gathered on a monthly basis. A search is considered popular if it has been performed at least 10 times within a month. Up to 500 popular searches are saved per month. At least 200 searches will be saved even if they are not considered popular. This means that no more than 200 searches will be saved unless there are 200 or more searches with 10 occurrences.”
- I have seen actual reports that contradict the documentation. Just FYI!

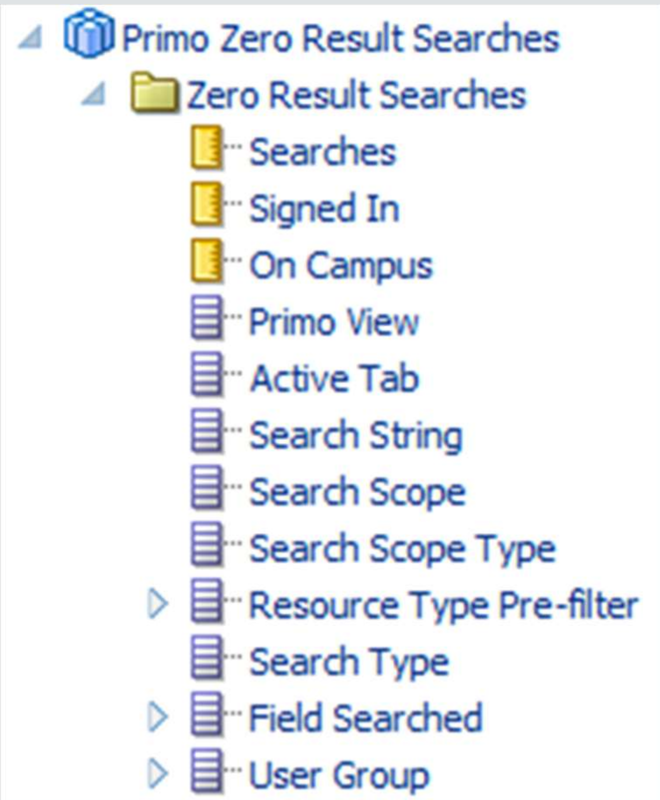


Sessions Subject Area



Sessions contains information about how long users stay when they access Primo, what countries they access from, etc.

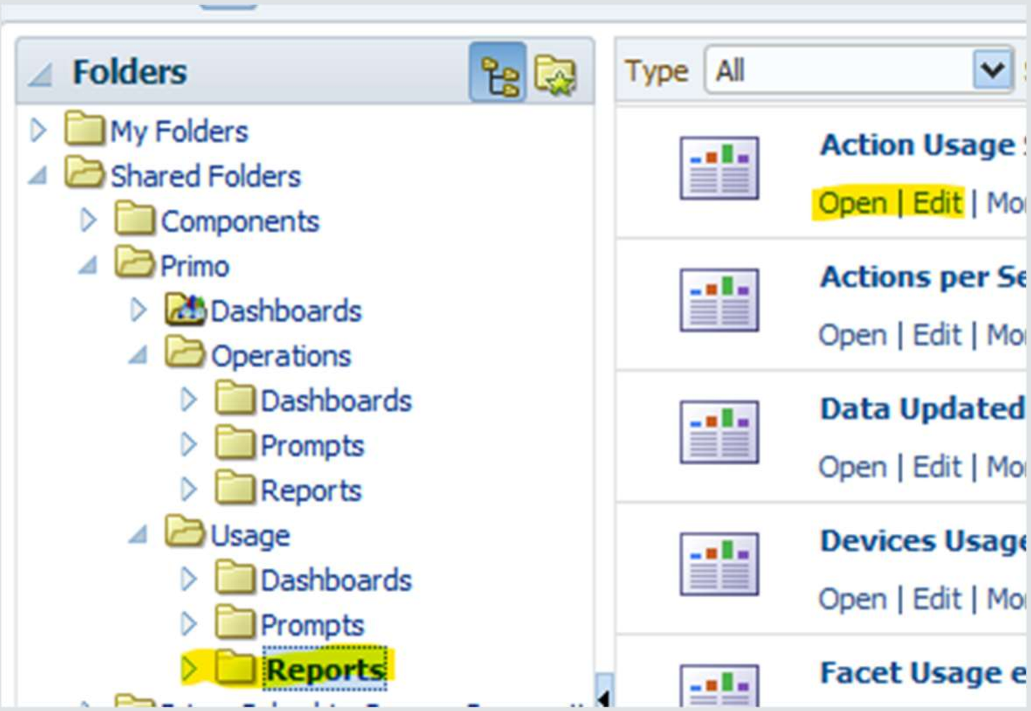
Zero Result Searches Subject Area



Zero Result Searches show data that help you determine which search queries produce zero results.

REPORTS

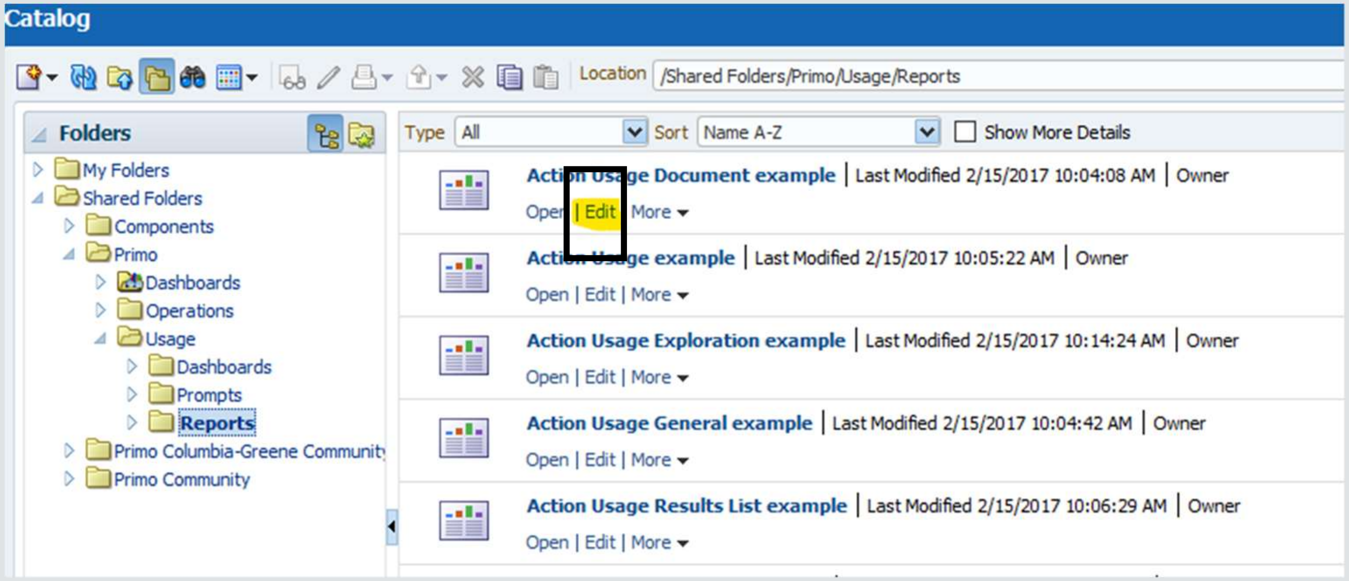
Accessing an OOTB Report



- Out of the box reports about Primo usage are saved in the Catalog: Shared Folders ->Primo -> Usage - > Reports
- Click on the Reports folder, then click Open for the report you want to see.
- See our FAQ: http://slcny.libanswers.com/faq/273293

DEMO ACCESSING OOTB REPORTS

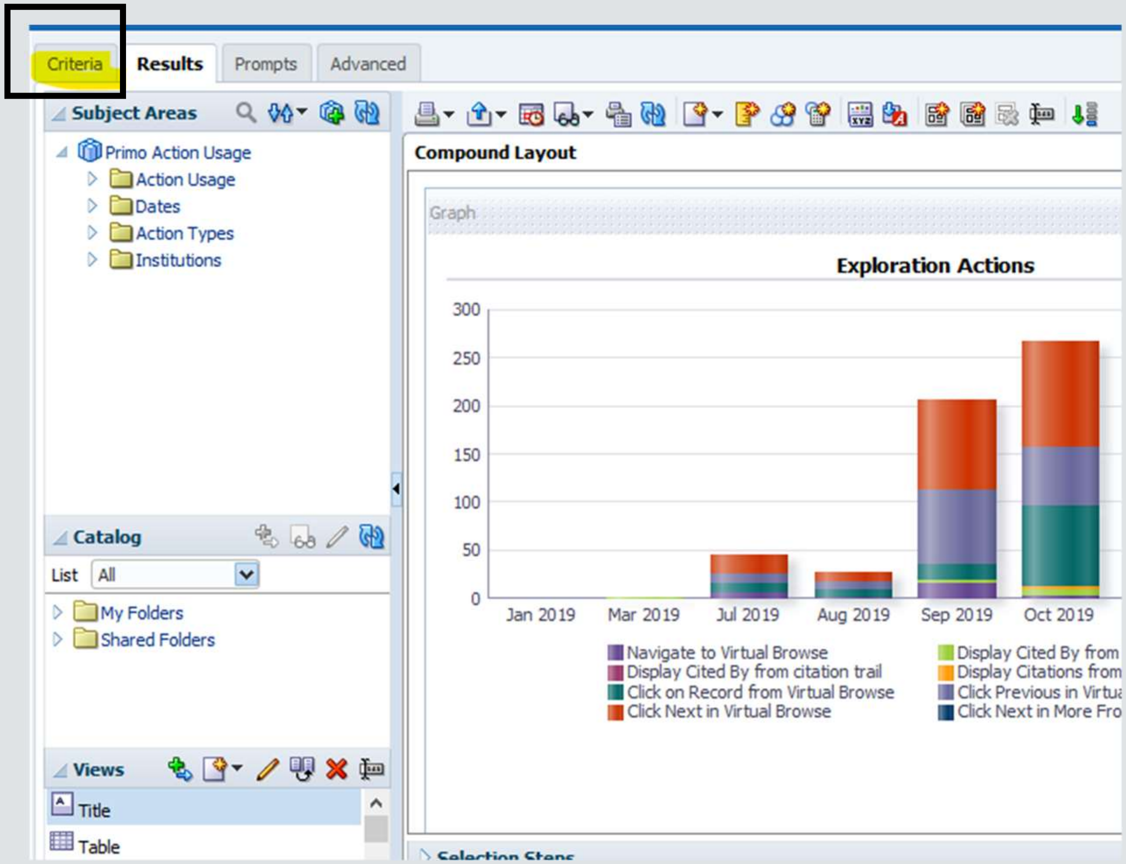
Modifying an OOTB Report



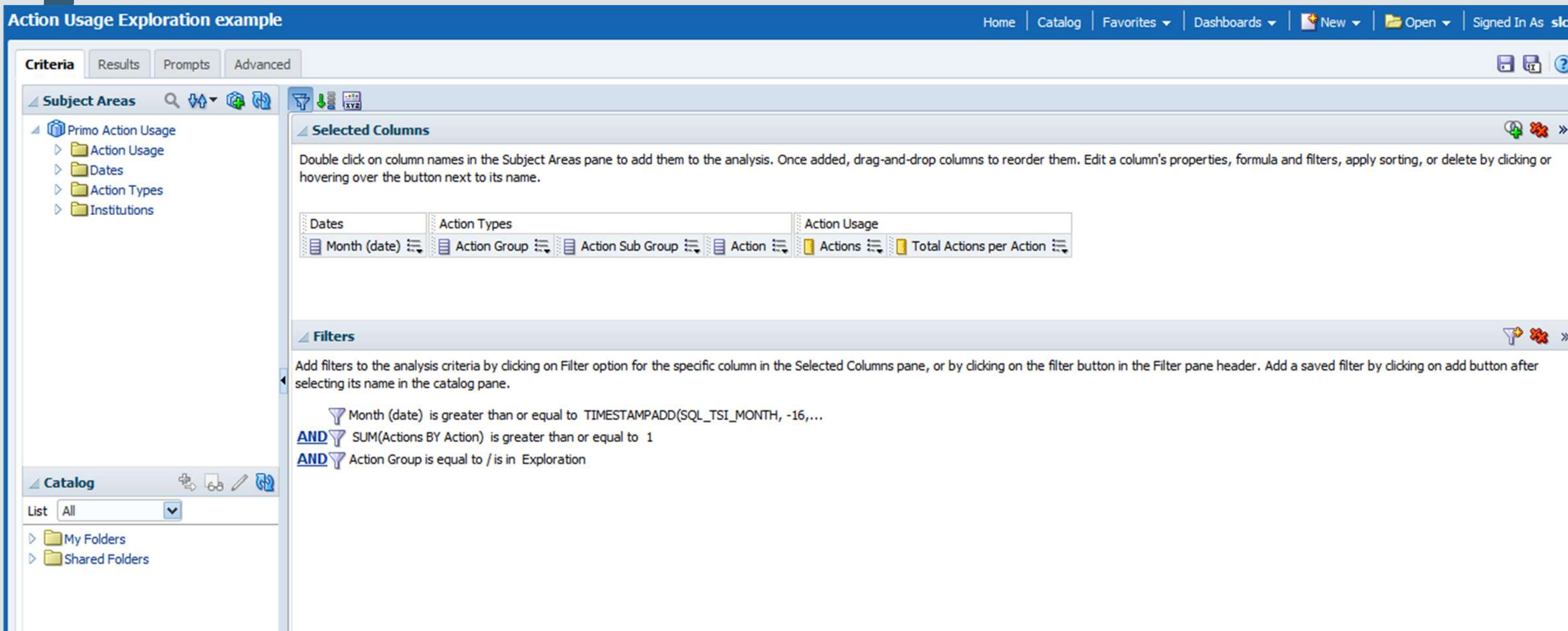
Find the Report you want to modify. Click "Edit" under the report name

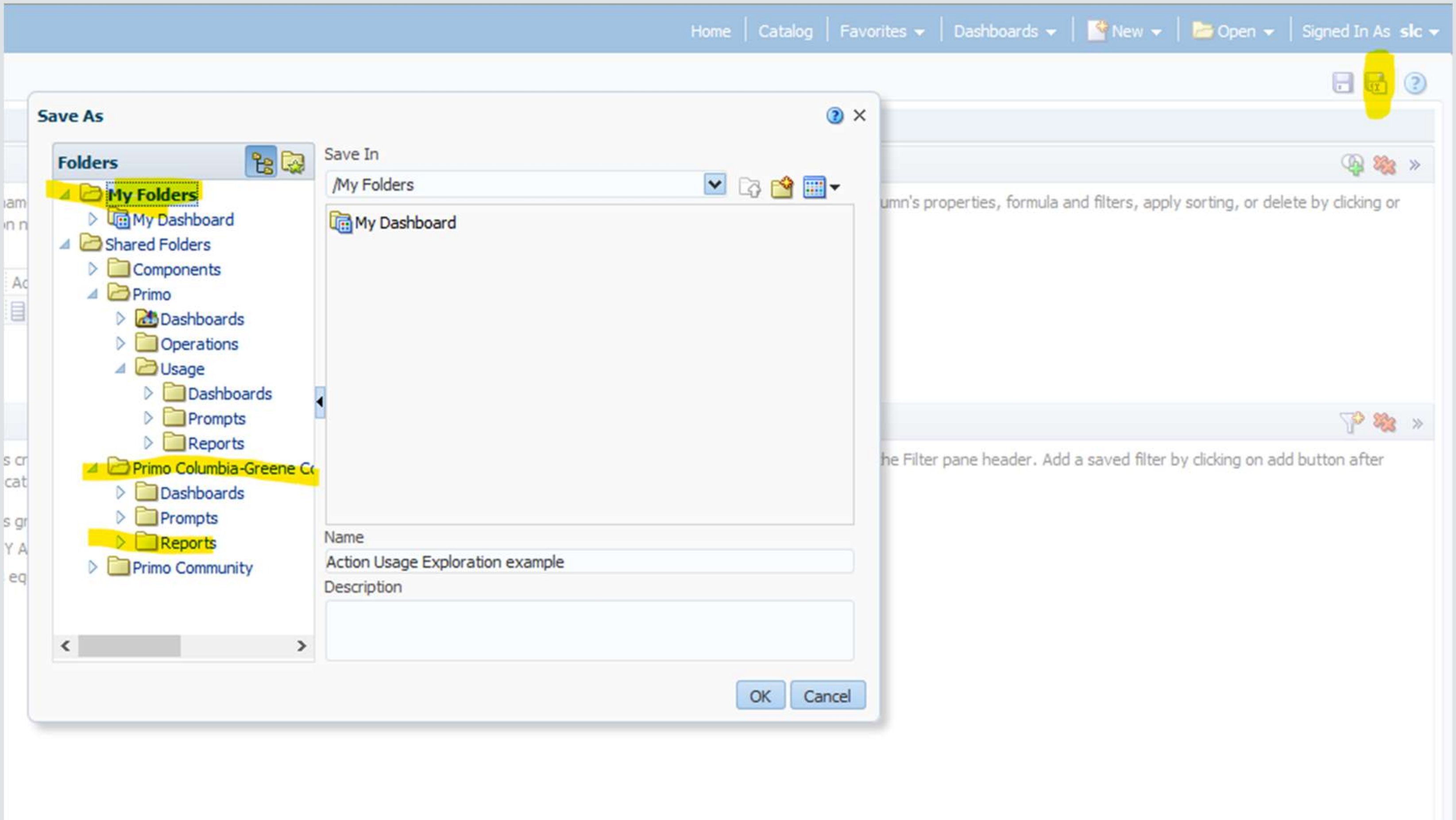
Modifying an OOTB Report

This will take you to the "Results" tab. Click on the "Criteria" tab to edit the report.

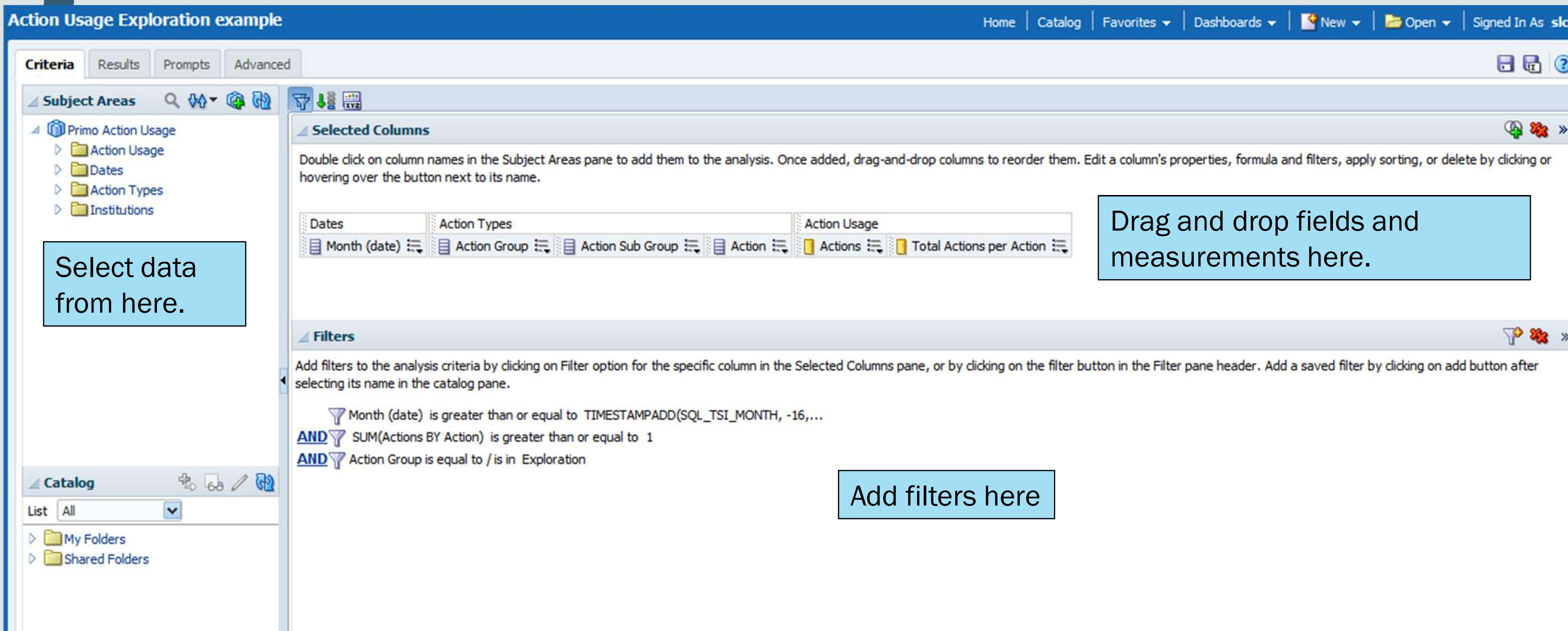


Now you can edit the report. But, first…

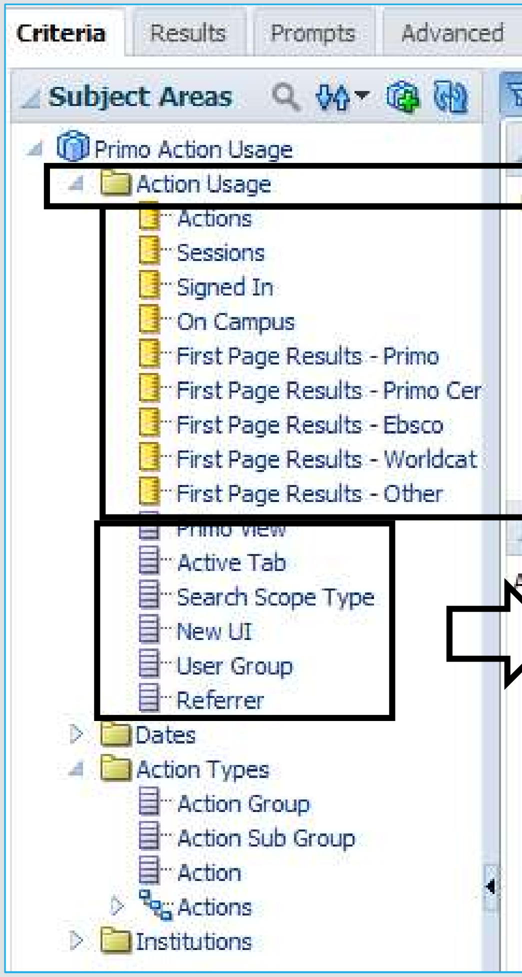




Click the “Save As” icon and save the report to your or your institution’s folder.


Action Usage Exploration example
Home
Catalog
Favorites
Dashboards
New
Open
Signed In As
Criteria
Results
Prompts
Advanced
Subject Areas
Primo Action Usage
Action Usage
Dates
Action Types
Institutions
Select data from here.
Catalog
List All
My Folders
Shared Folders
Selected Columns
Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.
Dates
Action Types
Action Usage
Month (date)
Action Group
Action Sub Group
Action
Actions
Total Actions per Action
Drag and drop fields and measurements here.
Filters
Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after selecting its name in the catalog pane.
Month (date) is greater than or equal to TIMESTAMPADD(SQL_TSI_MONTH, -16,...
AND SUM(Actions BY Action) is greater than or equal to 1
AND Action Group is equal to / is in Exploration
Add filters here

Subject Area terminology



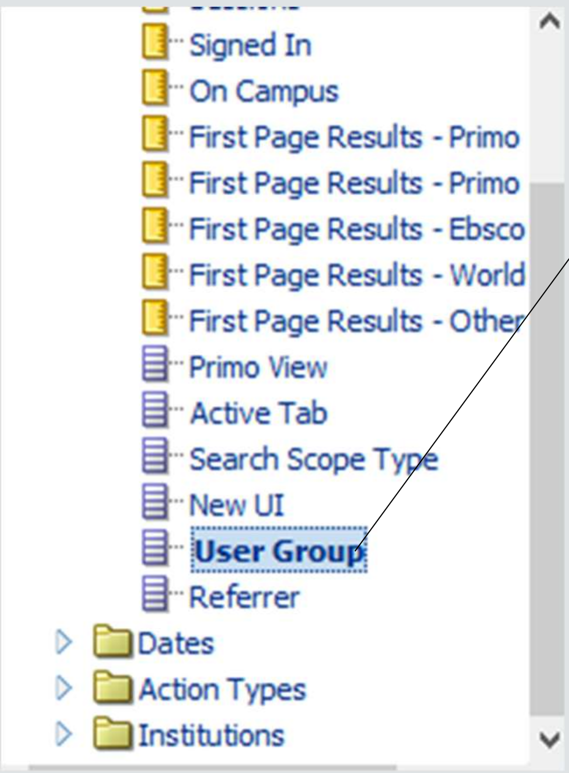
Fact (a folder with measurements is called a ‘Fact’)

Measurements (data which can be counted or aggregated and have a yellow rectangle are called ‘Measurements’)

Fields (also called ‘Attributes’, qualitative/descriptive data; indicated by blue icon with four boxes stacked)

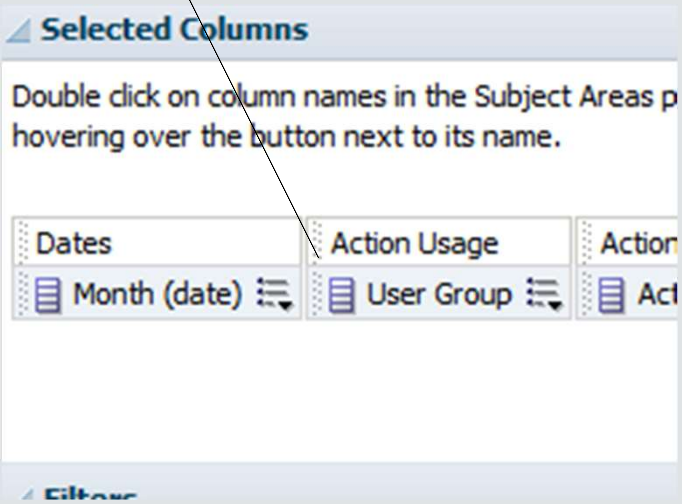
DEMO MODIFY OOTB REPORTS

Add data to report

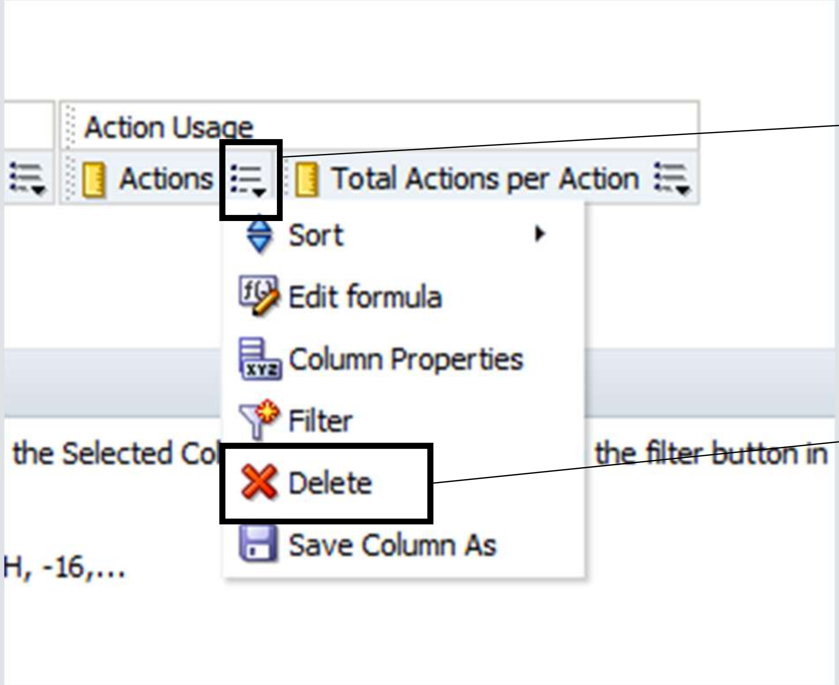


1. Select your data

2. Drag and drop it into the “Selected Columns” area.



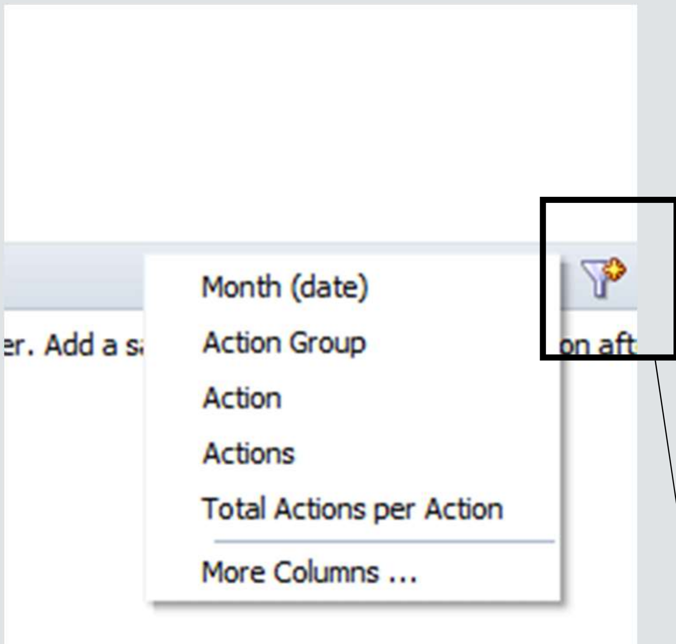
Remove data from report

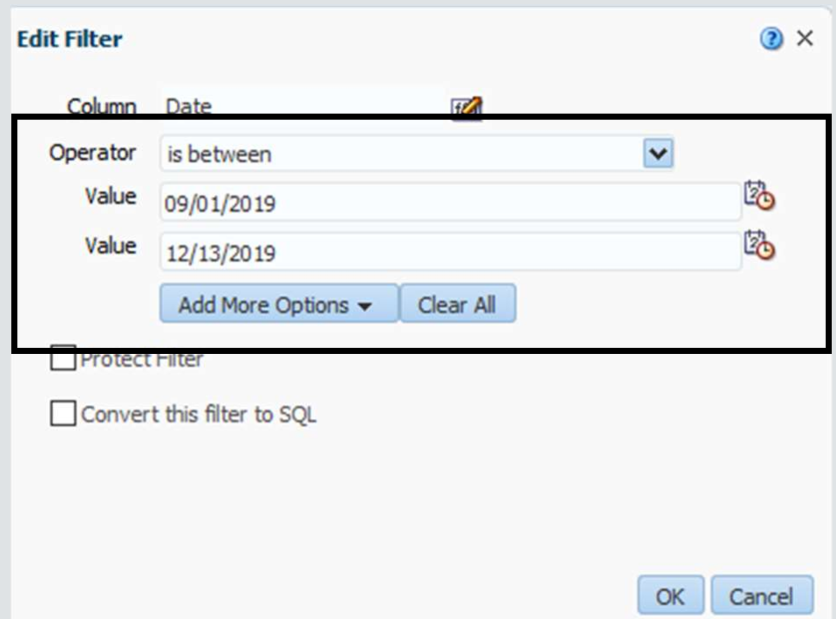


1. Mouse over or click this dropdown.
2. Click “Delete”

Add a date filter

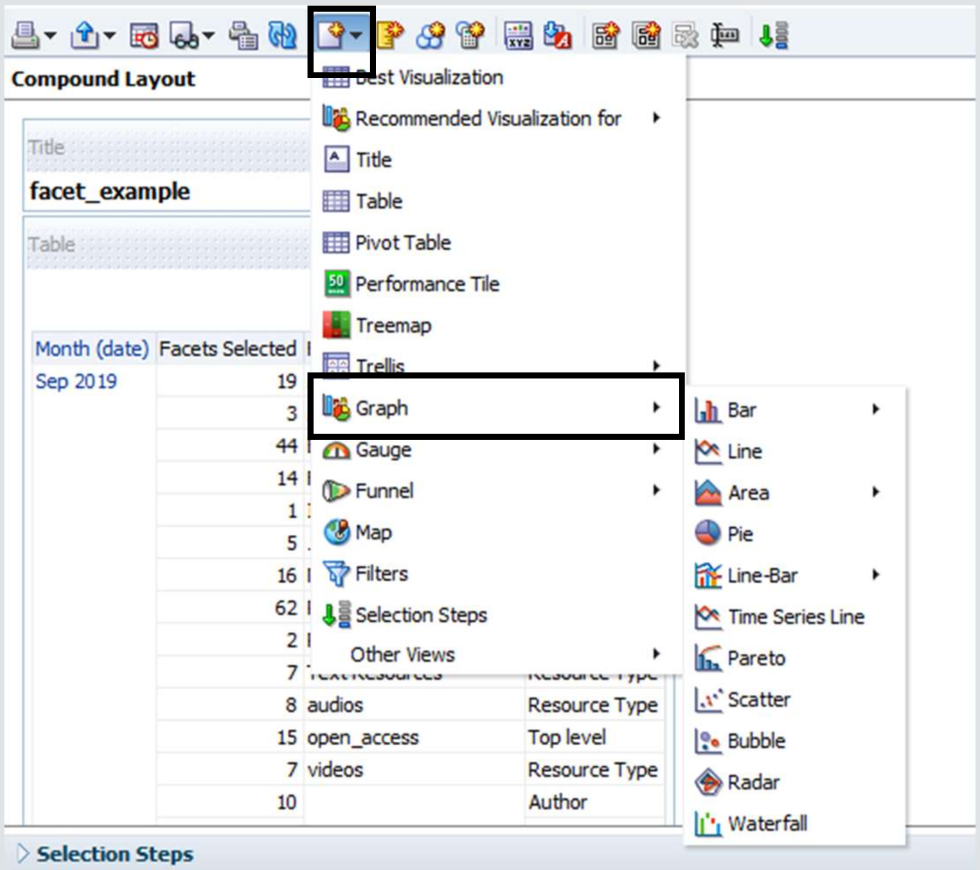
2. Fill out the relevant fields. For example, this will filter the report to show data from 09/01/2019 – 12/13/2019.





1.Click on the funnel icon. Choose either the field you want or “More Columns”

Add a graph to a Report



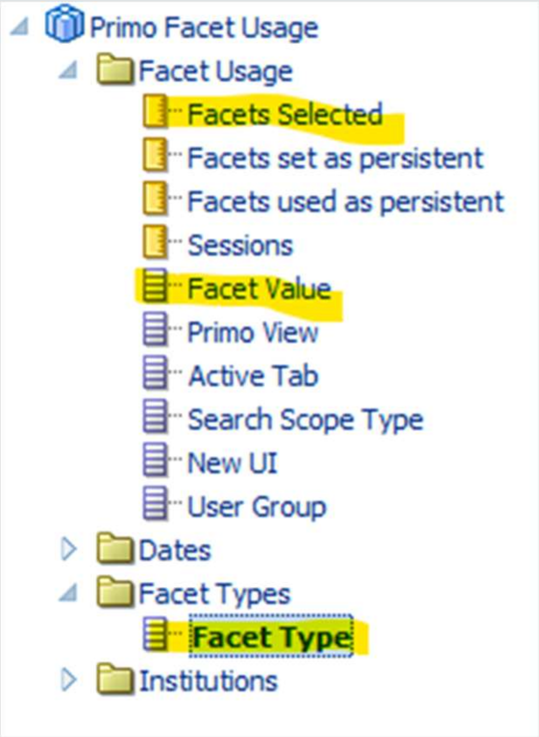
Navigate to the "Results" tab. Select the "New" icon. Select "Graph." Select to type you want. It will appear below or next to your data.

CREATING A NEW REPORT (ANALYSIS)

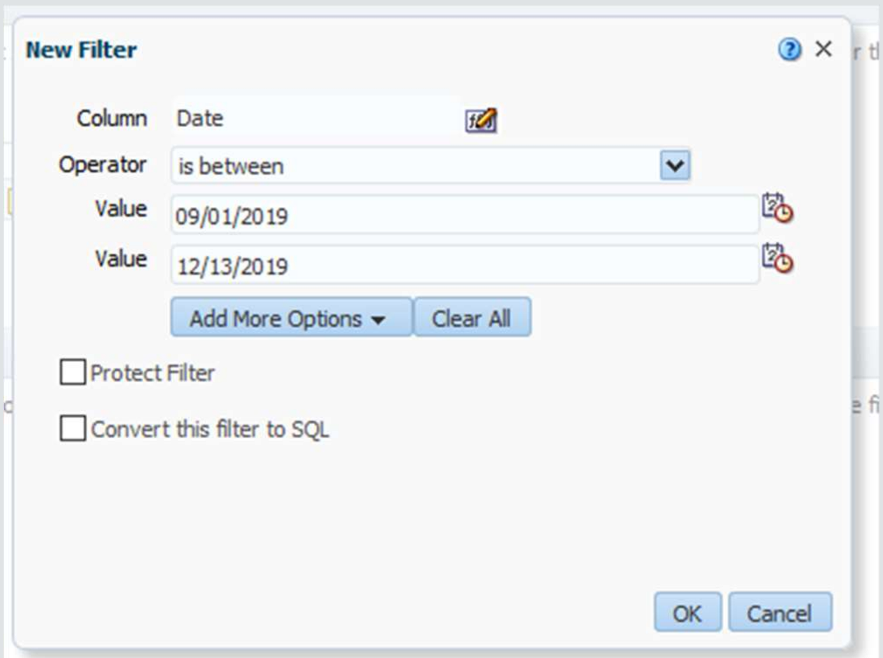
WHAT FACETS WERE USERS SELECTING DURING THE FALL SEMESTER?

Example #1 What facets were users selecting during the Fall semester?

- New Analysis - > Subject Area: Primo Facet Usage
- Add information about facets, such as:
  - *Facet Type*
  - *Facet Value*
  - *Facets Selected (this is numerical, so it will give you a count)*
  - *Month (if interested)*

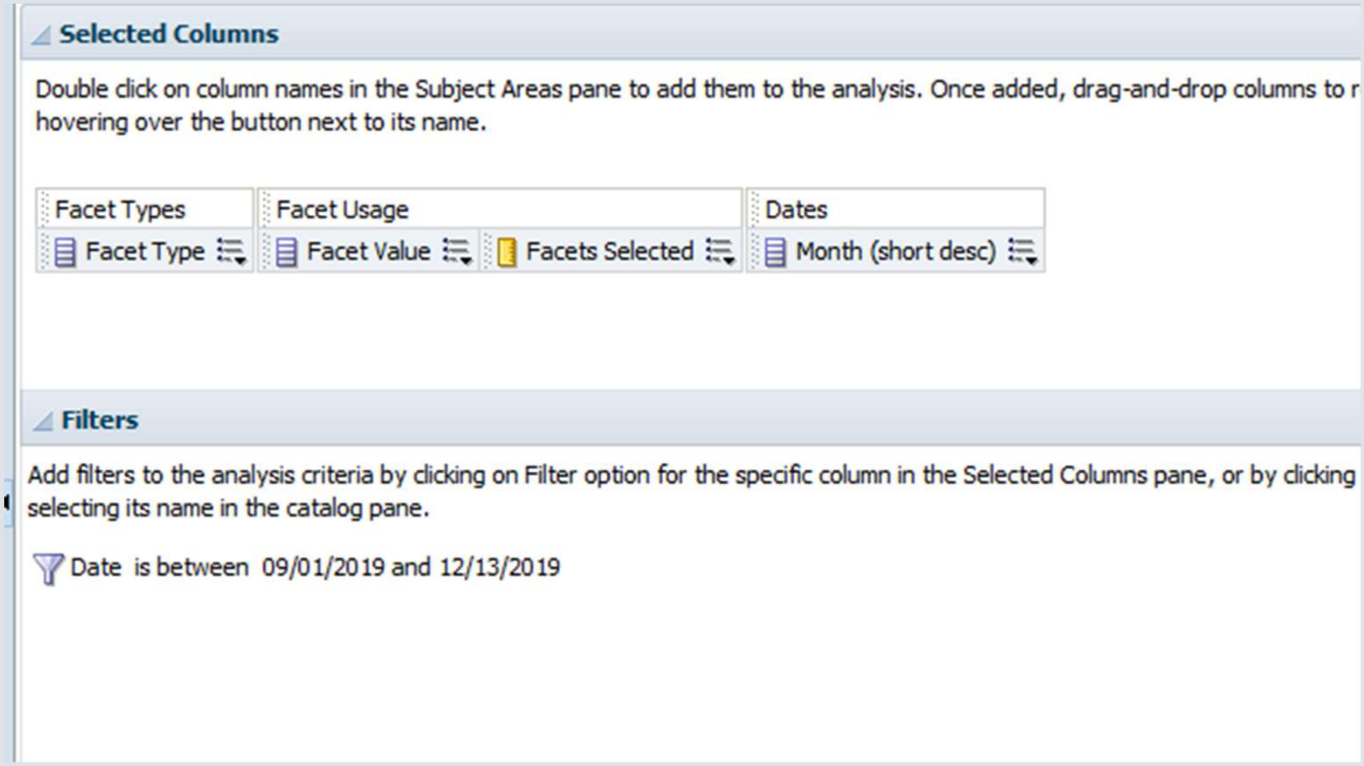


Example #1 What facets were users selecting during the Fall semester?



- Add a filter:
  - *Add Filter ->More columns -> Date*
  - *Operator = is between*
  - *Value = 09/01/2019 (or whenever you want)*
  - *Value = 12/13/2019 (etc)*

Example #1 What facets were users selecting during the Fall semester?



Your screen should something look like this. Don't forget to save!

Example #1 What facets were users selecting during the Fall semester?

Compound Layout

Month (date)	Facets Selected	Facet Value	Facet Type
Sep 2019	10		Author
	3		Collection
	26		Date Slider
	8		Journal
	8		Language
	12		Library
	117		Topic
	19	Articles	Resource Type
	3	Audio-Visual	Resource Type
	44	Books	Resource Type
	14	Full Text Online	Top level
	1	Images	Resource Type
	5	Journals	Resource Type
	16	Newspaper Articles	Resource Type
	62	Peer Reviewed Journals	Top level
	2	Reference Entries	Resource Type
	7	Text Resources	Resource Type
	8	audios	Resource Type
	15	open_access	Top level
	7	videos	Resource Type

- Click the “Results” tab to view the results. You can drag and drop the columns here, too.
- Ignore the calendar icon in this header. It doesn’t work.
- The eyeglasses icon will show you a preview of what your report will look like if you “Run” it.

WHAT SEARCH QUERIES ARE USERS ENTERING IN PRIMO?

Example #2 What search queries are users entering in Primo?

- The OOTB report, “Popular Searches Last Month example” works pretty well for this.
- Catalog -> Shared Folders ->Usage -> Reports -> Popular Searches Last Month example- >Open
- Able to select month
- Pre-sorted descending
- Shows number of results
- Note about “Signed In” field:

This reports the “The number of times an action was taken when the user was signed-in.”

Popular Searches Last Month example

Searches for month Dec 2019

Search String	Searches	Results	Signed In
tender is the night	27	73,916	10
dsm v	13	153,332	0
china,and;rtype,exact,books,and	12		0
allen ginsberg	10	21,102	7
ancient egyptian medicine	10	71,317	0
bipolar	9	599,912	0
psychiatric patients -- behavior ,and	7		0

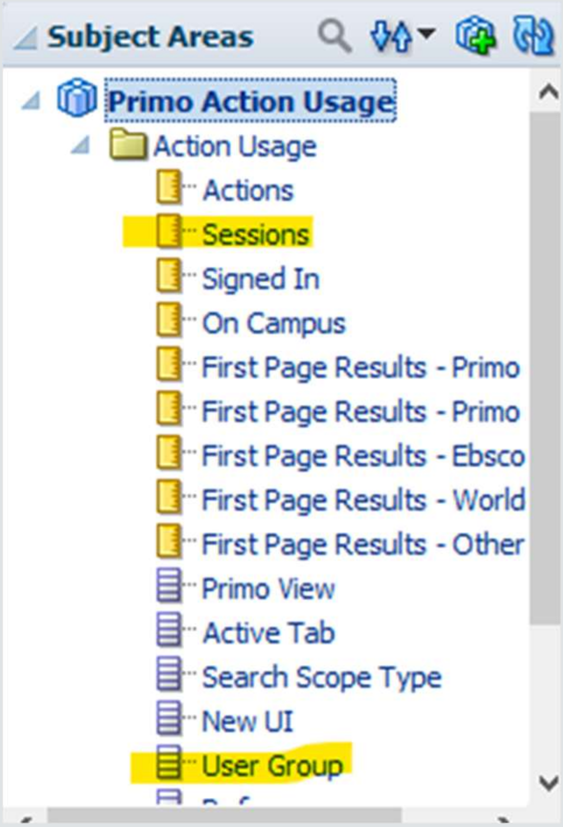
HOW MANY USERS ARE SIGNING INTO PRIMO IN FALL 2019?

Example #3 How many users are signing into Primo in Fall 2019?

- The “Signed-In” field has different definitions depending on which Subject Area you are using. In order to know how many separate users have signed in to Primo, use the field “User Group” in the Actions Subject Area.
- According to Ex Libris, “Reports will display the User Group codes that are received from the authentication system…. For users who have not signed in, the report will display the Guest user group.”

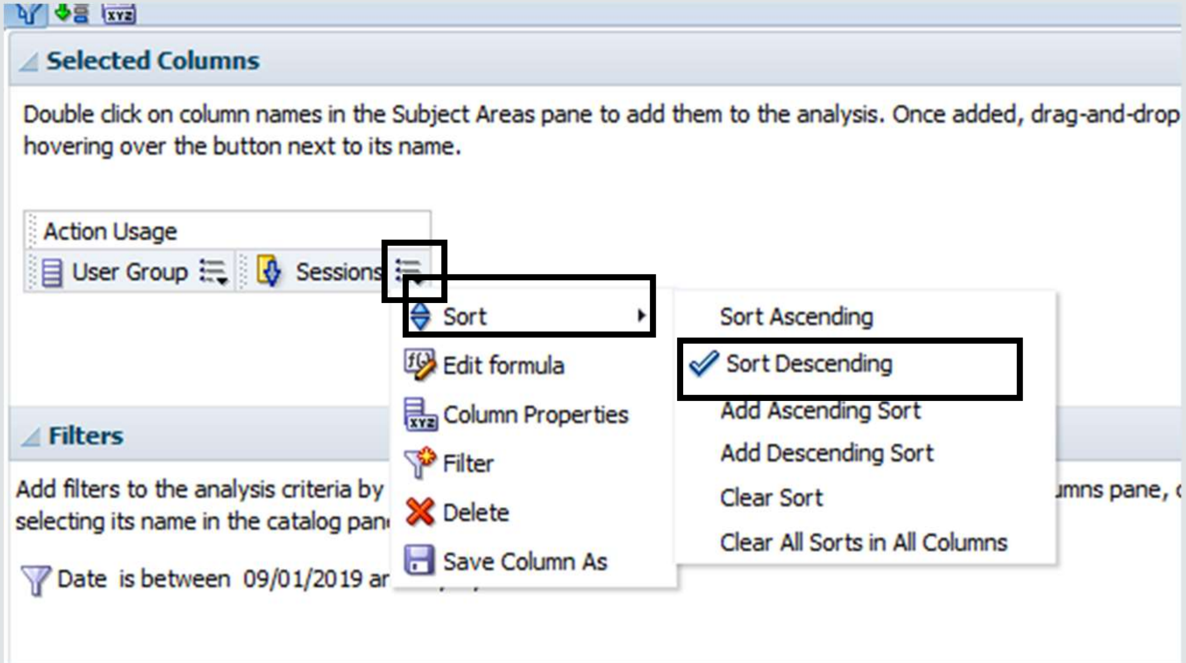
Example #3

- New Analysis - > Subject Area: Primo Action Usage
- Add Sessions (“A measurement field that tracks the number of sessions in which an action was taken.”)
- Add User Group
- Add date filter:
  - *Add Filter ->More columns -> Date*
  - *Operator = is between*
  - *Value = 09/01/2019 (or whenever you want)*
  - *Value = 12/13/2019 (etc)*



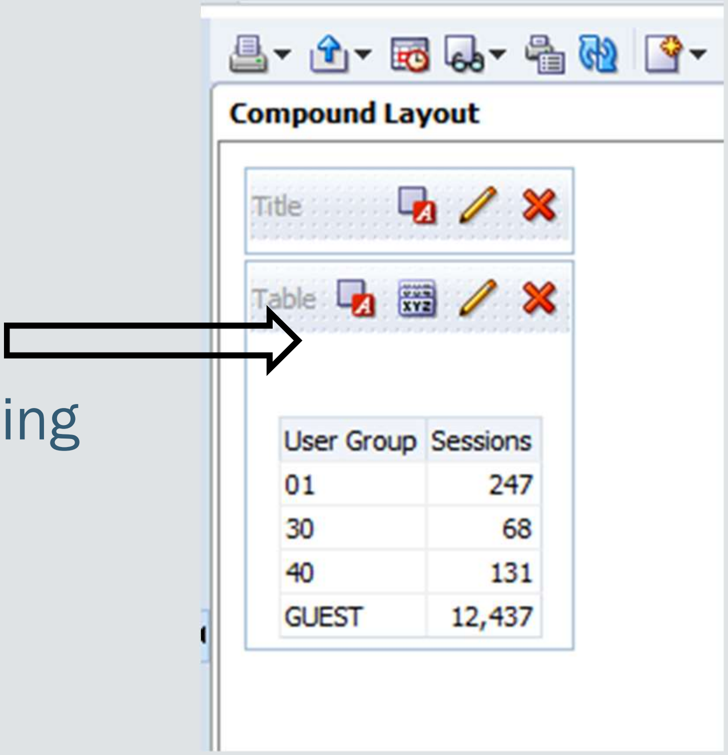
Example #3

- Click on the bulleted dropdown next to “Sessions” and select “Sort” then “Sort Descending.” This will put the largest number at the top of your results and the smallest at the bottom.



Example #3

- Click “Results” and it will look something like this.



Example #3

- To find the User Group numbers, go to Alma - >Admin -> User Management -> User Groups. This will tell you what the numbers mean. In our example:
  - 01 = Student
  - 30 = Faculty
  - 40 = College Staff

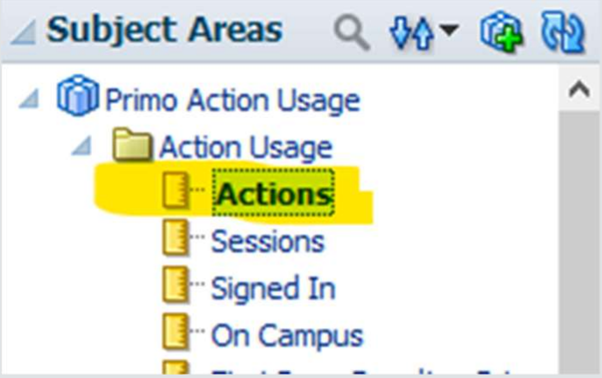
Code Table

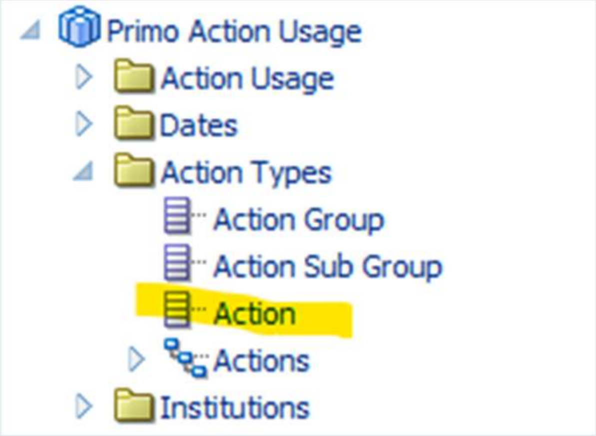
	Move Up	Move Down	Code	Description
1			01	Students
10			30	Faculty
12			40	College Staff

ARE MY USERS CLICKING ON "RECOMMENDED" DATABASES/LIBRARIANS/ ETC?

Example #4 Are my users clicking on "recommended" databases/librarians/etc?

- New Analysis -> Subject Area: Actions usage
- Add "Action Usage -> Actions" (measurement) (this is the number of actions taken
- Add "Action Types ->Action" (descriptive field) (this tells us what the action is)
- Add a date filter
  - *Add Filter ->More columns -> Date*
  - *Operator = is between*
  - *Value = 09/01/2019 (or whenever you want)*
  - *Value = 12/13/2019 (etc)*





Example #4

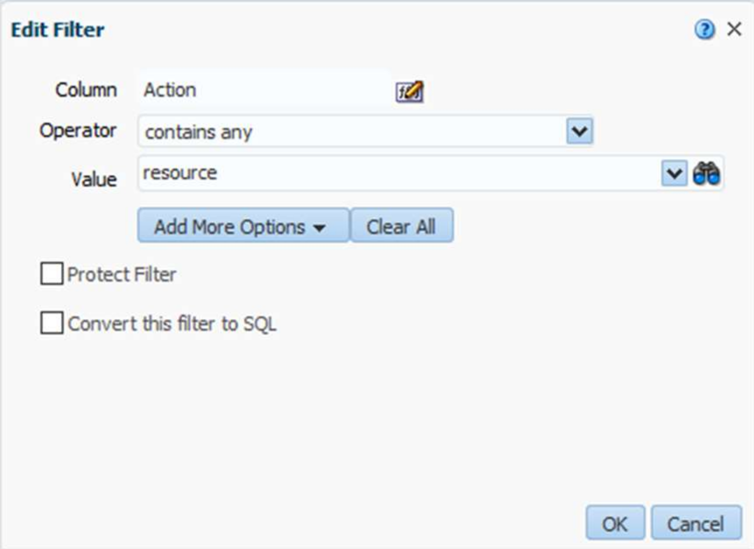
- Click “Results” and it should look like this. This shows us the number of times each action was taken in the time period specified.
- This giant list is a great way to get a quick overview of the types of usage you can get from Primo Analytics. Try it out!
- But, we need to filter by only the actions we want (ones related to resource recommender).

Compound Layout

Actions	Action
1	AZ list
2	Add bulk of records to favorites
1,736	Additional link
74,424	Advanced search
618,431	Basic search
1,230	BibTeX
1,714	Blocks and Messages
387	Browse Library of Congress call numbers
9	Browse SUDOC call numbers
401	Browse authors
1,475	Browse page
423	Browse related records
251	Browse titles
321	Cancel Request
181	Change personalized results
45,186	Citation
5	Citation linker
15	Click Next in More From The Same
7,172	Click Next in Virtual Browse
2	Click Previous in More From The Same
5,459	Click Previous in Virtual Browse

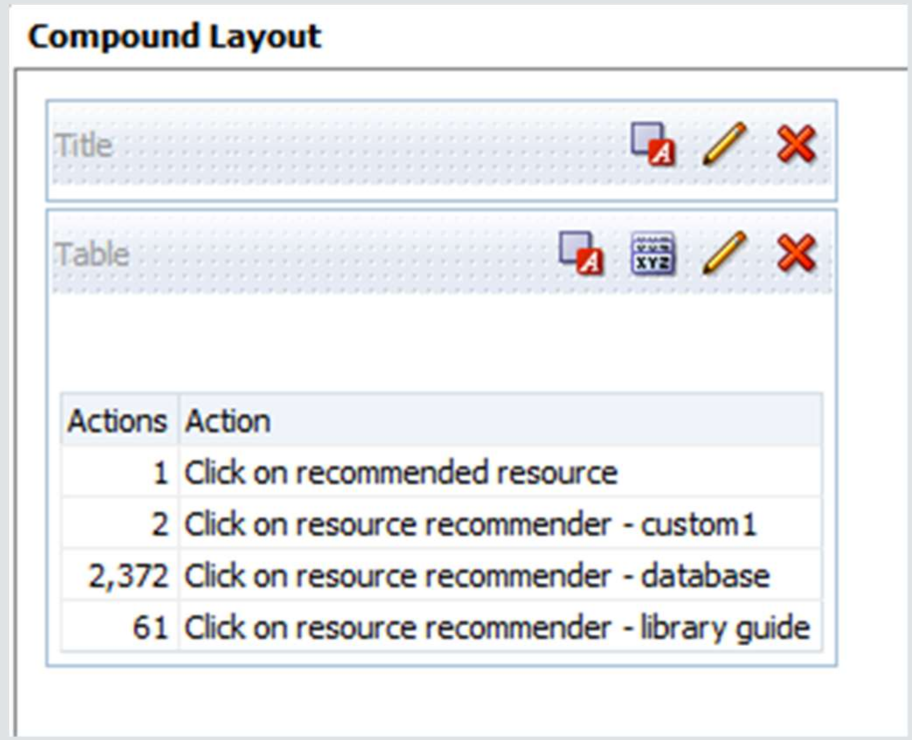
Example #4

- Go back to the “Criteria” tab.
- Mouse over the bulleted dropdown next to the blue Action Types (descriptive) Action field.
- Select “Filter”
- Operator: Is equal to/Is in
  - *Click on the binoculars to search for all the values related to resource recommender. Add additional as needed*
- OR, you can do this: Operator: ‘contains any’ and Value = “resource”



Example #4

- Add sorting if you like, then click the "Results" tab.



HOW MANY SEARCHES WERE CONDUCTED IN PRIMO IN FALL 2019?

Example #5 How many searches were conducted in Primo in Fall 2019?

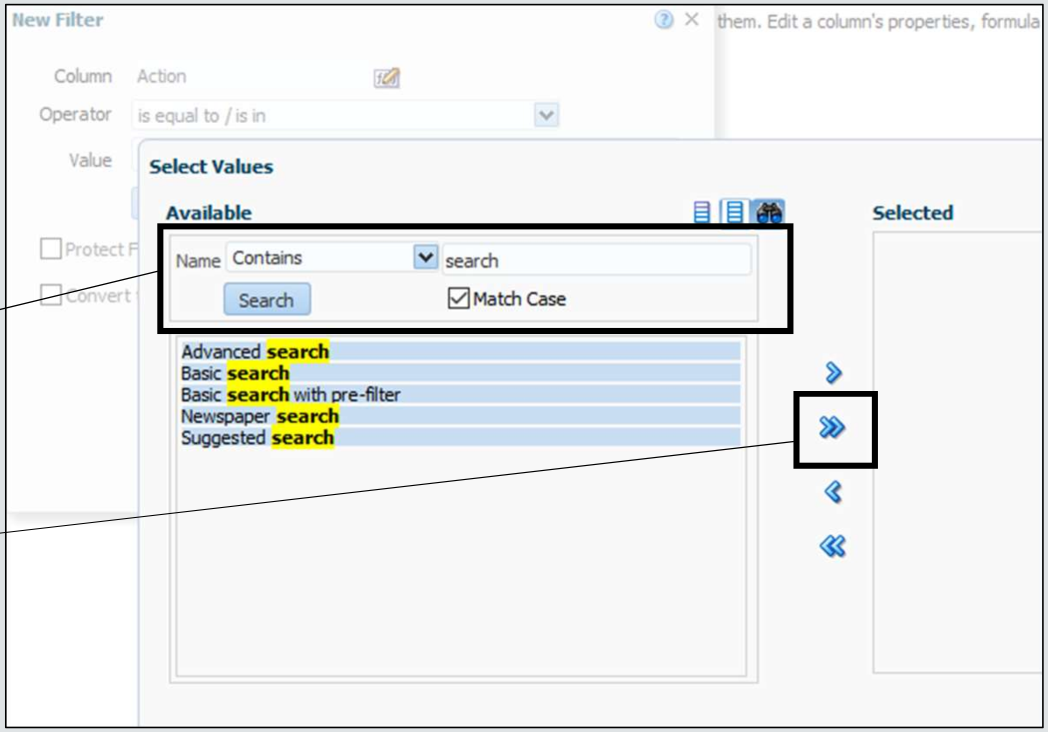
- Take your Analysis from Example 4, and remove the filter for limiting it to resource recommender actions.
- Click on “Results” tab and it will look something like this.
- Go back to the “Criteria” tab so that we can add a filter for the actions that we want.

Table

Actions	Action
647,170	Display full record
618,431	Basic search
184,784	Click on availability statement
102,874	Next page
78,559	Facet filtering
74,424	Advanced search
45,186	Citation
27,420	Services Menu
27,067	Overview
21,431	Sign-in
9,791	Display Primo Central versions
9,237	Requests
9,044	Save to eShelf
7,600	Loans
7,172	Click Next in Virtual Browse

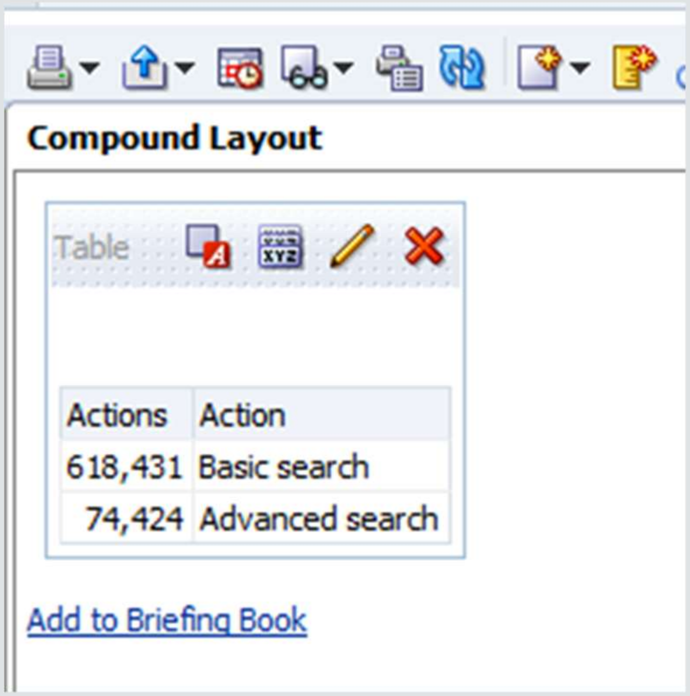
Example #5

- Add a filter for actions that contain the word search:
  - *Click bulleted dropdown next to "Action Type ->Action"*
  - *Click binoculars.*
  - *Select Name: contains*
  - *Type: search*
  - *Click Search. Use the arrows to move the actions over to the "selected" box*



Example #5

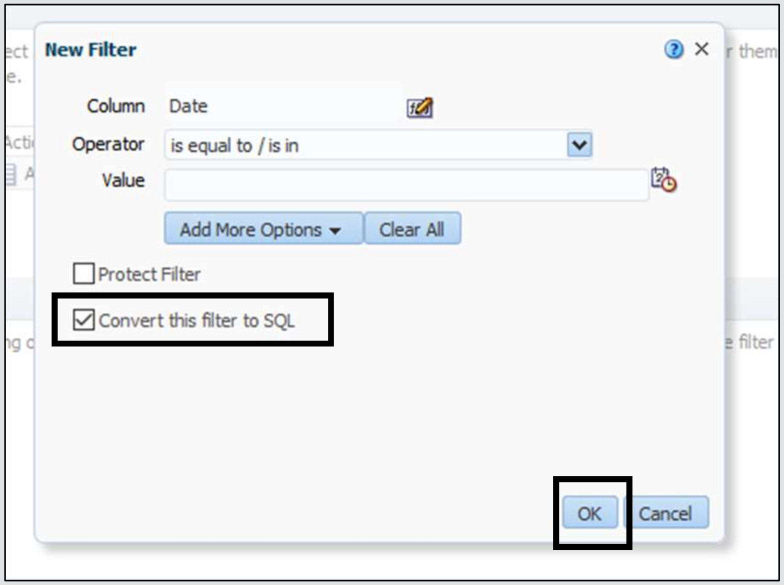
- Click “Results” again, and it should look something like this.

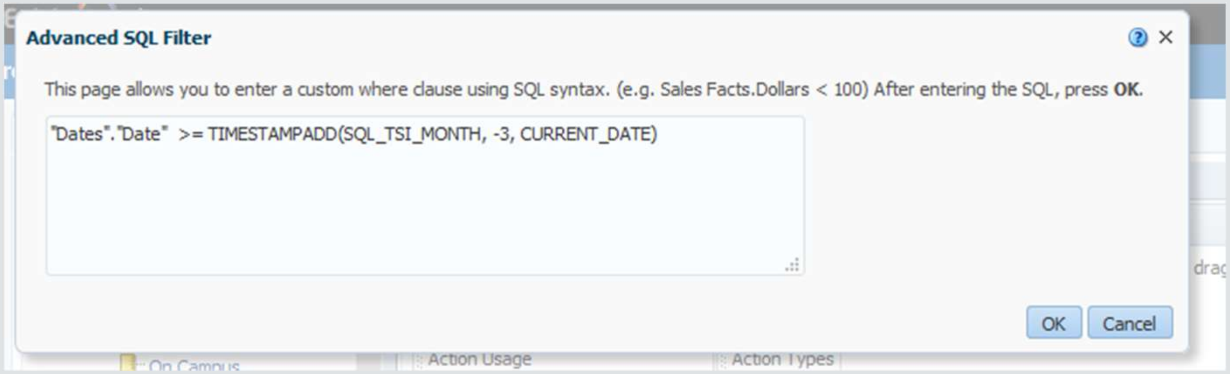


OTHER TIPS AND TRICKS

Run a report on something from the previous week, month, 3 months, year, etc

- To do this you need to use SQL in a date filter.
- Add a new Date filter to your report.
- Check the box next to “Convert this filter to SQL”

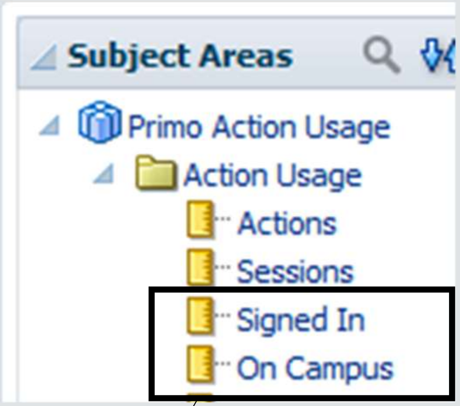




- This box will pop up. Enter the SQL and click "OK"
- Here is the syntax for other common date ranges:
- Previous 5 days:
  - *"Dates"."Date" >= TIMESTAMPADD(SQL_TSI_DAY, -5, CURRENT_DATE)*
- Previous week:
  - *"Dates"."Date" >= TIMESTAMPADD(SQL_TSI_WEEK, -1, CURRENT_DATE)*
- Previous 3 months:
  - *"Dates"."Date" >= TIMESTAMPADD(SQL_TSI_MONTH, -3, CURRENT_DATE)*

“On Campus” and “Signed In”: obvious definitions, right? WRONG

- These fields have different definitions depending on which Subject Area you are using. Review the field definitions before using them. For example, “Signed In”
- “The number of times an action was taken when the user was signed-in.” (Actions)
- “A measurement field that tracks the number of times a user signed in when using a type of device.” (Device)
- “A measurement field that tracks the number of times a user signed in within a session.” (Sessions)
- “The number of times an action was taken when the user was signed-in.” (Popular Searches)
- “A measurement field that tracks the number of times a signed-in user performed a search and received no results.” (Zero Results)



These are not the data you’re looking for…

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Primo/Analytics/Primo_Analytics_Subject_Areas

Filter by View

Compound Layout

Table

Actions	Action	Primo View
520,128	Basic search	01SUNY_BUF:everything
59,105	Advanced search	01SUNY_BUF:everything
51,849	Basic search	01SUNY_BUF:catalog
42,475	Basic search	01SUNY_BUF:journals
11,802	Advanced search	01SUNY_BUF:catalog
3,416	Advanced search	01SUNY_BUF:journals
2,952	Basic search	01SUNY_BUF:reserve
961	Basic search	01SUNY_BUF:01SUNY_BUF
70	Advanced search	01SUNY_BUF:reserve
59	Basic search	01SUNY_BUF:kjmiller
16	Advanced search	01SUNY_BUF:01SUNY_BUF
15	Advanced search	01SUNY_BUF:kjmiller
4	Basic search	01SUNY_BUF:ExLib_Default_01SUNY_BUF_2019January
3	Basic search	01SUNY_BUF:everything_CDI

- If your campus has multiple Views for Primo, you can filter by View or display View in your reports.
- Use field type “Primo View”

Scheduling a Report

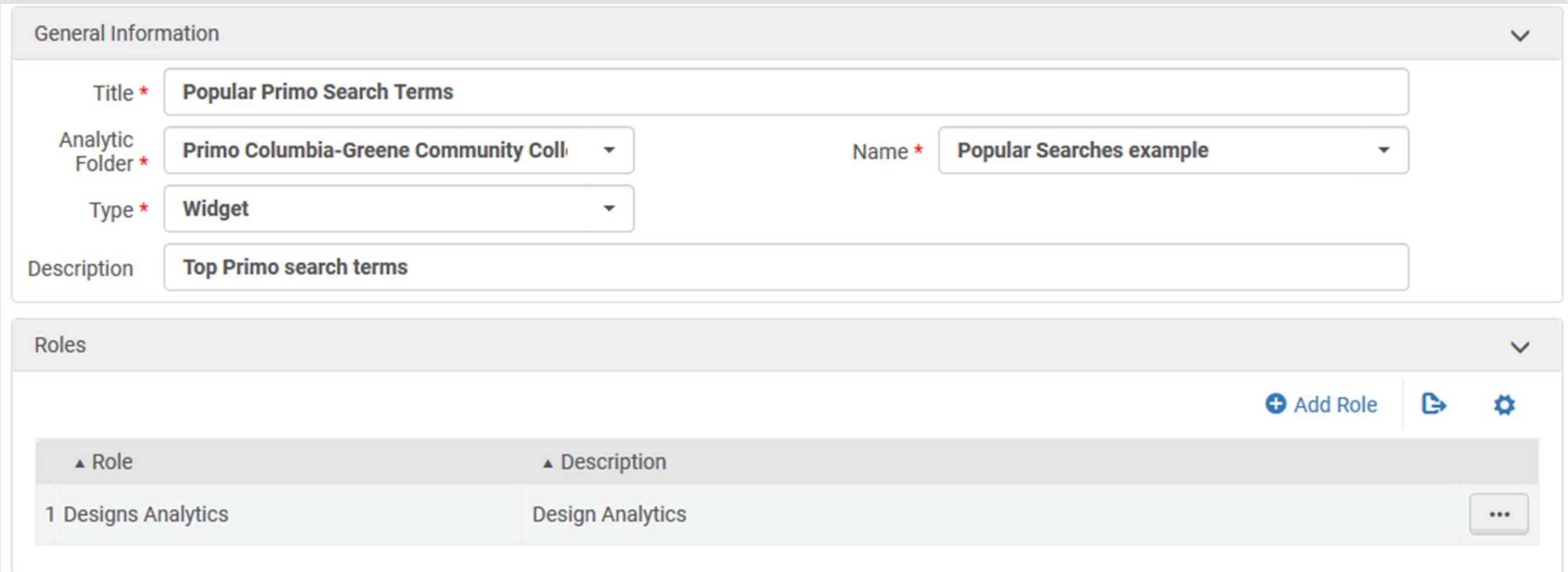
- Schedule a report to run every day, week, or month.
- See http://slcny.libanswers.com/faq/247426 , but be sure to select "Add New Primo Analytics Object"

Sending a Report to your Email

- See http://slcny.libanswers.com/faq/247427
- To send to an email that isn't associated with an Alma user account: http://slcny.libanswers.com/faq/279741

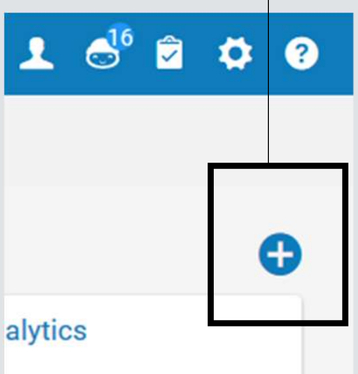
Adding a Primo Analytics Widget to Alma Homepage

1. Create a report and save it in Shared Folders/ Your Institution/Reports
2. In Alma, mouse over Analytics then select “Analytics Objects List”
3. Click “Add New Analytics Object” and Select “Add New Primo Analytics Object”
    1. *Title: Give it a relevant title*
    2. *Type: Report or Dashboard*
    3. *Analytic Folder: Choose where the report is located*
    4. *Name: Select the relevant report*
    5. *Description: Give it a brief description*
    6. *Roles: Add Role-> Design Analytics*

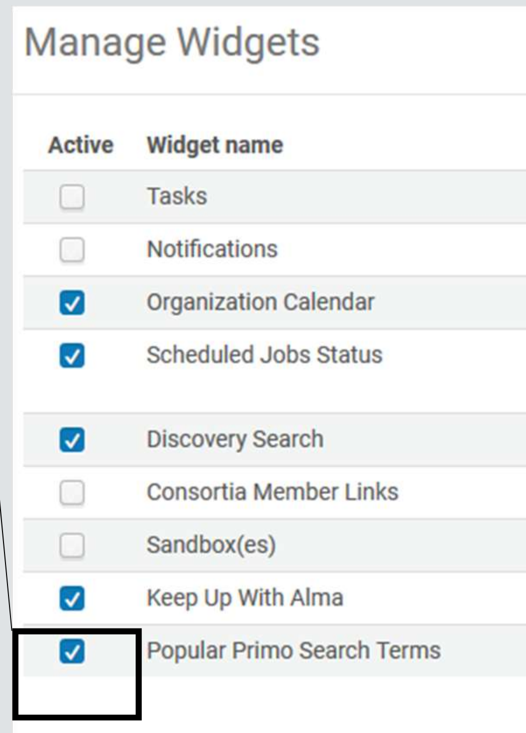

General Information
Title *
Popular Primo Search Terms
Analytic Folder *
Primo Columbia-Greene Community Coll
Name *
Popular Searches example
Type *
Widget
Description
Top Primo search terms
Roles
Add Role
Role
Description
1 Designs Analytics
Design Analytics

Adding a Primo Analytics Widget to Alma Homepage

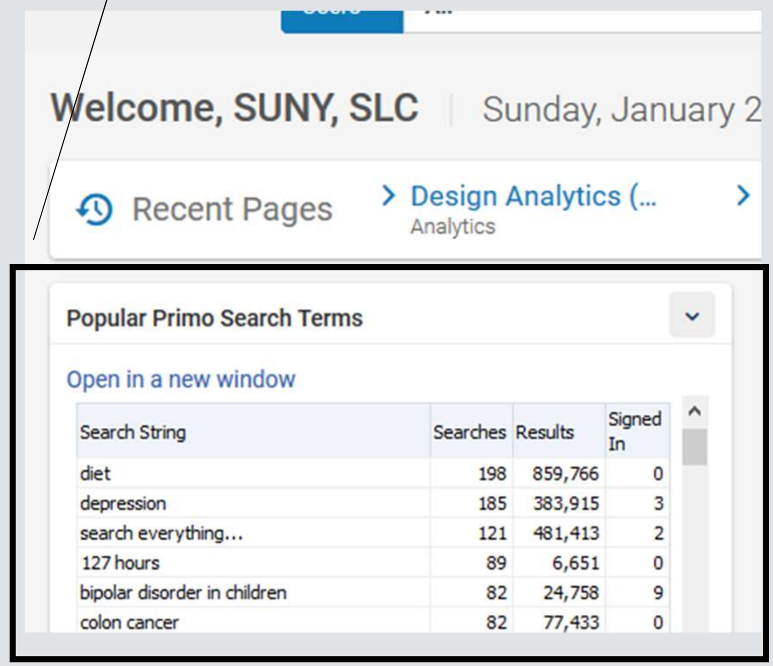
1. From the Alma homepage, click the "Manage Widgets" button



2. Select your widget



3. Your widget should appear on your Alma home page



Helpful Links

- Description of Primo VE Analytics Subject Areas and fields within them: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Primo/Analytics/Primo_Analytics_Subject_Areas
- Ex Libris Presentation on Primo Analytics:
  - *https://knowledge.exlibrisgroup.com/@api/deki/files/48653/Analytics_-_Overview_and_introduction_to_Primo_Analytics.pptx?revision=3*