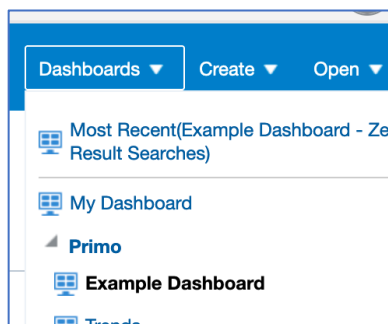


Notes from the CARLI Primo VE – Become an Expert Discussion Section “Analytics” - April 15, 2021

You access Primo VE Analytics by going to Analytics > Design Analytics (Primo).

General Discussion

UIS showed us a few weeks ago some things they found useful in Primo VE Analytics, so that was like a little preview of the information in today’s webinar.



JUD: Does the Example Dashboard include our institutions out-of-the-box analytics?

CARLI: Yes! Actual data is included there.

GRN: I'm really interested in looking at the facets to see what we might remove.

CARLI: Yes, this seems like a good way to see what might be useful to clean out non-used/infrequently used facets.

TRN mentions that they see the Minnesota data problem mentioned in near the end of the ExL webinar with the Zero searches analysis. Webinar attendees reported seeing results for institutions in Minnesota in the Example Dashboard instead of their own institution. LEW and JUD confirm they see this, too. TRN screen shares their Example Dashboard - she copied it to her own folder, yet even the one she copied to her own institutional folder is showing MN data. And if she edits it and adds institution name, then it's their TRN data.

CARLI also sees this issue and thinks that what we're seeing is the result of someone editing and out-of-the-box report instead of copying it back to their own institution folder to customize it. Ted explains that you can overwrite data/reports from the community, that's why it's important that if you are going to modify an Analysis or Report that you copy it back into your own institution folder rather than constantly relying on shared reports. Probably someone else did this incorrectly and it affected the out-of-the-box query where it lived in the shared folder. There have been cases in other types of analytics that another institution's data are showing up for a separate place. Ted thinks this dates back to when the Analytics were rebuilt several months ago.

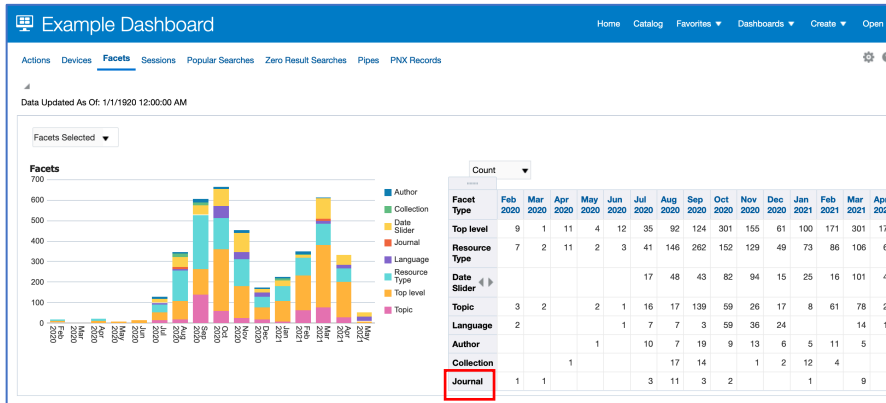
Ted demonstrates where the dashboard lives and how to add an institution name to "reset" the dashboard, and how to copy the Example Dashboard and how to save it.

During the session, some institutions reported seeing their own correct institutional data in the Example Dashboard, so perhaps Ex Libris was already working on the problem since it was identified in the webinar.

JOL said that they took a lot of the reports in the example dashboard and modified them to make them more useful to us and create our own dashboard.

Looking at Facets in Analytics

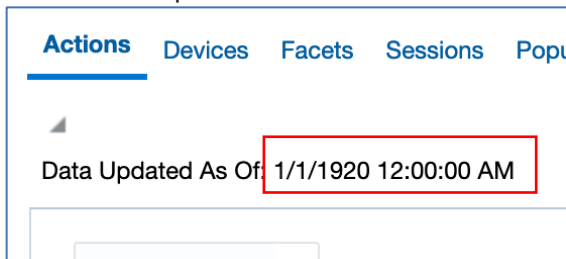
DAC: I found correlating the facets listed in the dashboard to what we actually have on our Primo. I'm thinking specifically about the "Journal" facet. Clarification -- correlation is difficult, for example, what's the "Journal" facet.



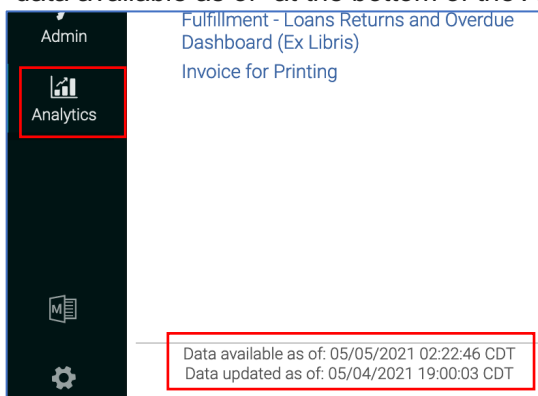
CARLI: Remember that the facets a user sees in Primo VE will change depending on the type of search they do, specifically which search scope is used and if it includes CDI results or not, or if they are using a specific search feature like Journal Search. The analysis will list all facets and not break them down by search scope or feature. So there isn't a "Journal" facet in your Primo VE, but that probably means a user used the facets within the Journal Search feature.

Data Updated As Of:

CARLI: Example dashboard has date of 1/1/1920 and other people in session are seeing that, too:



CARLI has reported this erroneous date to Ex Libris in Case 946978. For now, you should rely on the "data available as of" at the bottom of the Analytics menu in Alma instead:



CARLI: Has anyone created their own custom analysis/analyses for Primo VE?

NLU: still working on getting through the alma analytics webinars first

UIS: For the most part the default reports work well for us

JOL: I've done a lot of modifying of the Primo reports, but not created anything from scratch yet because what they had pretty much gave us what we need with some tweaks.

LEW: I have not created new Primo reports yet, but probably coming soon.

Analytics Training

CARLI: The “[2020 Alma Analytics Master Class](#)” training from last fall by Connie Braun is a good place to start. It doesn't start with the basic-basics of Analytics, but it provides a lot of information by using examples of problems you are trying to solve or data you would like to get.

- The Analytics Master class is linked on CARLI's page here: <https://www.carli.illinois.edu/products-services/i-share/alma-analytics>
- If you need truly basic tutorial, there is a video within the Alma Essentials training that you can start with: https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Alma_Essentials_-_English/I_Alma_Analytics
- Or the Analytics Training module in the Knowledge Center: <https://knowledge.exlibrisgroup.com/Alma/Training/Analytics>
- There are videos in the Alma Certification course on Analytics: https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Administration_Certification/Analytics
- And the Ex Libris LibGuide for Analytics has several videos and documents: <https://exlibris.libguides.com/alma/analytics>

Resource Recommender suggestions from Analytics

UIS: Has anyone used analytics to inform their Primo resource recommender suggestions?

CARLI: demos resource recommender - based on terms of query you can have the recommended resources pop up at the top of results. Ex Libris Knowledge Center documentation on it is here:

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/120Other_Configurations/010Resource_Recommender_for_Primo_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/120Other_Configurations/010Resource_Recommender_for_Primo_VE)

UIS has started playing around with resource recommender but wondered if anyone else has found them useful or not. Doesn't want to spend a lot of time on it if it's not worth it. UIS demos the back end of resource recommender that he's working with - in Discovery - Resource Recommender Config. He's set up library hours as part of it so far.

LEW: Not yet, but that was something we did in Summon. Just haven't gotten to the Resource Recommender in Primo VE yet. They had library hours as part of theirs, specific databases like PsychInfo (they were looking at popular general searches people were doing).

NLU: Looked at popular searches, too, to provide ideas to recommend. People were looking for New York Times, Wall Street Journal, and EBSCO so added instructions for how to get to those specific items.

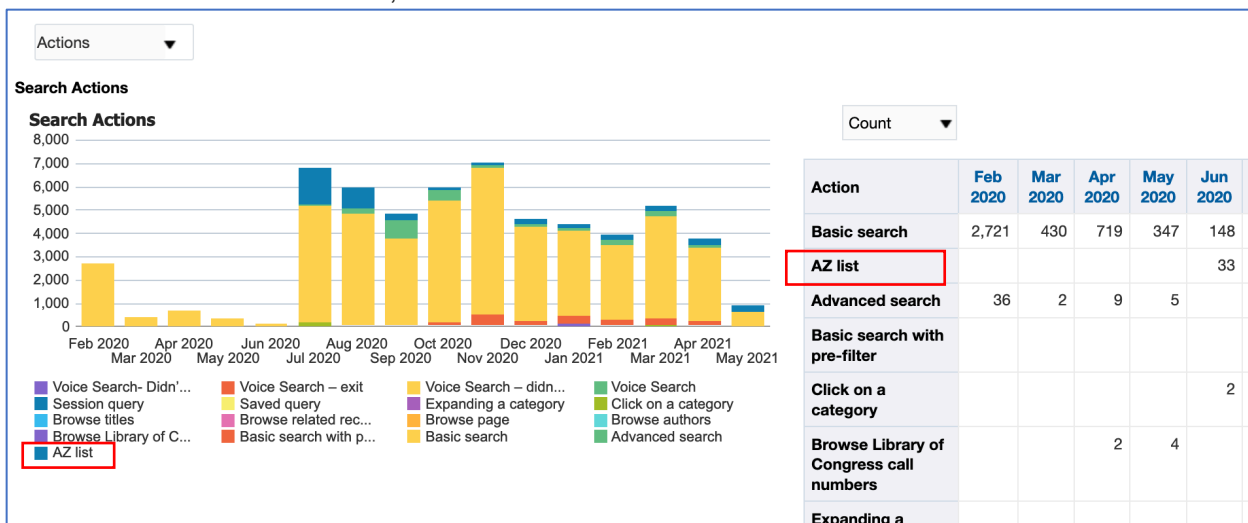
TRN: I've added a few resource recommender items for a couple of topics/areas, but I don't know that they've actually been used yet.

For those who have Resource Recommender set up, the "Exploration Actions" table in the Actions section of the dashboard has data for how often the recommenders appeared and how often they were clicked on:



AZ list

RVC: In the Actions dashboard, what does "AZ list" refer to in the Search Actions list?



CARLI: This might refer to the Journal Search feature you can configure to display in the Links menu in Primo VE. In Primo Classic, the Journal Search option was an A-Z list rather than a search box, but Ex Libris has said that they do not intend to add an A-Z list option for Primo VE; the Journal Search box is the only option.

Here's a list of definitions from Primo Classic (there doesn't appear to be any additional information for VE):

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

Search

AZ list

A search invoked from an e-Journal A to Z list (Alma).

DPU: Is that a search against the link resolver? If not, where are the counts for the link resolver searches?
CARLI: There's a specific subject area for link resolver activities in Alma Analytics. And there is some basic data in Primo VE that relates to it, but it's rather generic so use the Alma Analytics for specifics, like title-level details.