
Primo Back Office Access for Total Care Customers

- **Product:** Primo
- **Relevant for Installation Type:** Total Care

Description

Primo Total Care customers have access the following areas of the Primo Back Office:

- Primo Analytics
- UI Customization Package Manager
- File Uploader (Classic UI)
- Resource Recommender Configuration (under FE & Delivery)

This Article provides an overview of these features and links to helpful training and documentation resources.

Primo Analytics

Primo Analytics allows you to use and create powerful reports on library activities. You can use out-of-the-box reports, or create your own reports. Dashboards can also be created to display groups of reports that you customize.

Documentation:

See the [Analytics](#) section of Primo Documentation, which provides documents on several Primo Analytics topics. We recommend starting with the documentation on “The Basics of Working with Primo Analytics,” and also recommend that you review “General Terminology.”

The Schedule Reports and Dashboards page (Primo Home > Schedule Primo Analytics) allows you to manage your report and dashboard jobs, create new jobs, modify existing jobs, and monitor the status of your jobs (using the Last Run Date and Last Run Status fields). Primo Analytics also gives you the ability to schedule email delivery of out-of-the-box reports, or reports you create.

Documentation: [Scheduling Analytics Jobs](#)

UI Customization Package Manager

The UI Customization Package Manager allows you to create and manage the customization packages that include the CSS, HTML, JavaScript, and image files, which allow you to change the look of the New Front End user interface.

Documentation: [UI Customization Package Manager](#)

For documentation on the NEW UI, go to: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/New_Primo_Interface

We recommend starting in the "Frequently Asked Questions" area.

File Uploader (for the Classic UI)

Use the File Uploader to update Primo Front End CSS and Static HTML files.

Documentation: [File Uploader Tool](#)

Important Note: Use of the File Uploader by Total Care customers is optional, and is only recommended for customers with experience editing html and css. Ex Libris Support is happy to answer any questions you may have about using this tool, but we do not troubleshoot or support customer-created CSS/HTML files.

Resource Recommender (New UI)

The Resource Recommender area in the Back Office (under FE & Delivery) allows you to define resource recommendations (such as a library guide, librarian or a Website) that are displayed based on searchable tags. When a user performs a search in which the query exactly matches the searchable tag, the new Primo UI displays up to three associated recommendations at the top of the brief results.

Documentation: [Configuring the Resource Recommender Service](#)

Additional Information

If you do not have access to a Total Care login to the Primo Back Office, please submit a Primo Case via the Support Portal and we will provide login instructions. It may be necessary to update our firewall rules to allow you to connect to the Back Office, so please include your IP address in the Case.

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- **Article last edited:** 27-Apr-2018