



Introduction to Blue Cloud Analytics

May 2018

In this guide, we will introduce Blue Cloud Analytics as a reporting tool for libraries to run on demand statistics in a web-based program. The functionality of Blue Cloud Analytics (BCA) is similar to Director's Station, the previous reporting program, with some additional report options which we will discuss in detail in this document. BCA is designed to be easier to use, more intuitive, and allow for more creative data presentation. Blue Cloud Analytics is intended to replace Director's Station. This guide will address the following topics:

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Basic Overview of Blue Cloud Analytics

- Blue Cloud Analytics is a web-based program. You do not need to download any software and you do not need to be logged in to WorkFlows to run BCA. Simply open your preferred browser and navigate to: <https://na1-microstrategy.bc.sirsiidynix.net/bcanalytics/asp/Main.aspx>
- The information in Blue Cloud Analytics is **not** real-time. BCA uses a nightly snapshot of the Montana Shared Catalog (MSC) system data.
- Reports in BCA do not have the ability to change anything in the MSC system. They are merely a way to pull, view, and organize information. This is great because users don't have to worry about "breaking" anything in the system while using BCA. You can experiment and run reports without anxiety.
- For patron protection, any reports with patron data other than the User ID will be limited to your Library-Specific folder. Reports with patron data for your library can be built for you and saved in your Library-Specific folder where only your library will have access. Please feel free to request these reports. Once these reports are built for you, you may run them on demand anytime.
- Reports that send notices, print notices, or make any changes to item or patron data will still run in WorkFlows reports (for now!).
- When you request reports by opening a [Help Desk Ticket](#), the MSC administrators may decide to build that report for all libraries to use as well. In this way, all the MSC members will help us make BCA into a highly useful and usable tool for all libraries. We urge you to let us know what reports are useful for you, because they may be useful for everyone. Your input is important!
- All reports that you need to save for use on a later date must be downloaded and saved on your computer. The History List in BCA is not a reliable location to save reports. "My Subscriptions" will save the report template and any changes to the look/organization of the report but it will not save the information in the report.
- SirsiDynix is still rapidly developing BCA and the other Blue Cloud products. They are adding additional functionality regularly and sometimes making changes that affect our premade reports. If you find that a that report errors out or does not look correct, please [Open a Help Desk Ticket](#).
- There are several differences in naming conventions between WorkFlows and BCA that are sometimes confusing. For example, in BCA the **Home Location** of your items is called "**Item Collection**". The following is a chart of commonly used names in WorkFlows and the corresponding name in BCA. There is a terminology visual guide starting on [pg. 24](#).

Name in WorkFlows	Name in BCA
Home Location	Item Collection
User ID	User Barcode
Current Location	Item Status
User Categories	User Attributes
Never (never checked out)	1900-01-01

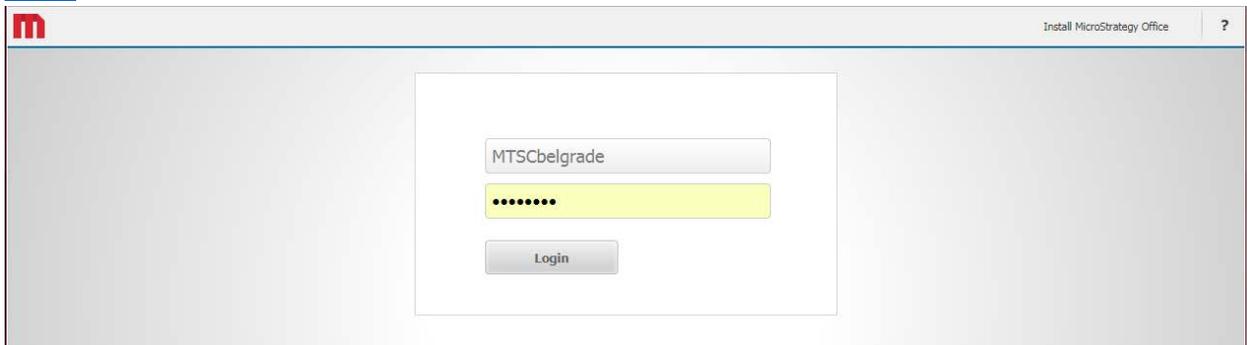
Overview of Report Functionality:

All reports are organized into folders by function. This is an overview of each folder and the types of reports that you will find in each of these locations.

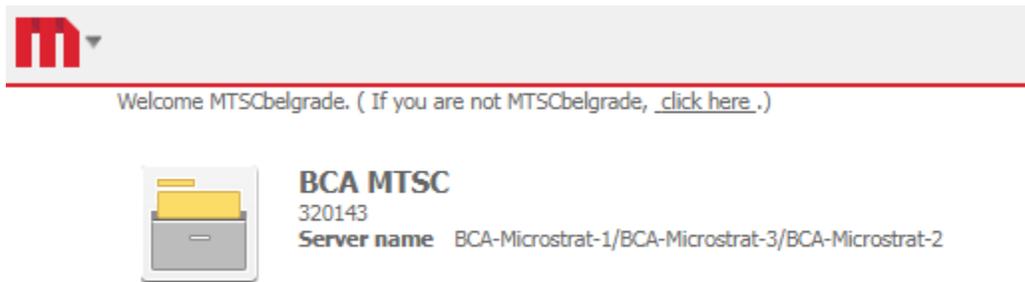
Bills	<p>Reports that are related to bills and payments.</p> <ul style="list-style-type: none"> • Daily Cash Report
Collection Maintenance	<p>Reports for maintaining the library collection.</p> <ul style="list-style-type: none"> • Shelf lists • Weeding lists • Missing/Trace lists • Inventory reports
Collection Statistics (Historical)	<p>Reports that generate information about past circulation.</p> <ul style="list-style-type: none"> • Circulation statistics by 650 tag, Item Cat, Home Location • Daily transaction statistics • Top circulating items by library collection • Top circulating items in the entire MSC • Lifetime circulation reports
Collection Statistics (Present)	<p>Reports that generate information about your collection at present.</p> <ul style="list-style-type: none"> • Collection value • Collection counts
Holds	<p>Reports related to holds.</p> <ul style="list-style-type: none"> • Top holds lists by collection • Unfulfilled holds lists
Users	<p>Reports that generate statistics related to library users.</p> <ul style="list-style-type: none"> • Daily user counts • User counts by attribute or profile • Expired user counts
Sharing Groups	<p>Reports that are useful for libraries that are members of a sharing group.</p> <ul style="list-style-type: none"> • Intransit statistics with daily totals or date range totals • Sharing Group top circulating items • Sharing Group item totals • Sharing Group top holds lists
Library-Specific Reports	<p>Reports that are specific to a library. Your library will only be able to view your own reports in this folder.</p> <ul style="list-style-type: none"> • Reports that are specific to your library (as requested) • Reports that contain any user information other than the User ID

Log In and Folder Navigation:

1. Open your browser.
 - a. Supported browsers for all SirsiDynix web-based products include the 2 most recent versions (updates) of the following browsers:
 - Chrome
 - Firefox
 - Safari
 - IE
2. In the address bar, type: <https://na1-microstrategy.bc.sirsiDYNIX.net/bcanalytics/asp/Main.aspx>
3. On this login page, enter your library's login credentials. The BCA login and password is assigned to you by the MSC administrators and are different from your WorkFlows logins. You will also only get one login/password per library. If you do not know your login, please [Open a Help Desk Ticket](#).

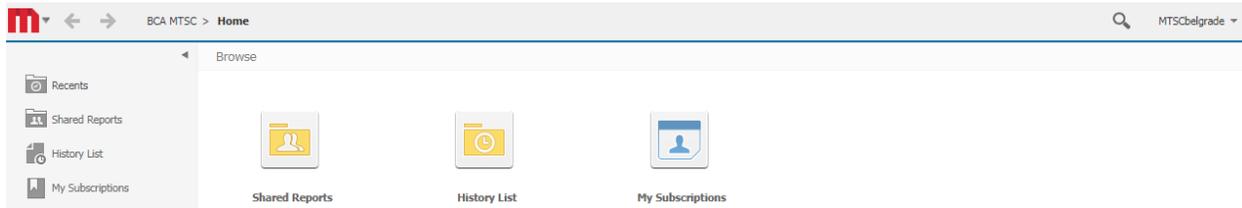


4. On the welcome page, click on BCA MTSC folder. This is the main folder for all MSC libraries. You will always enter this folder when you log into BCA.

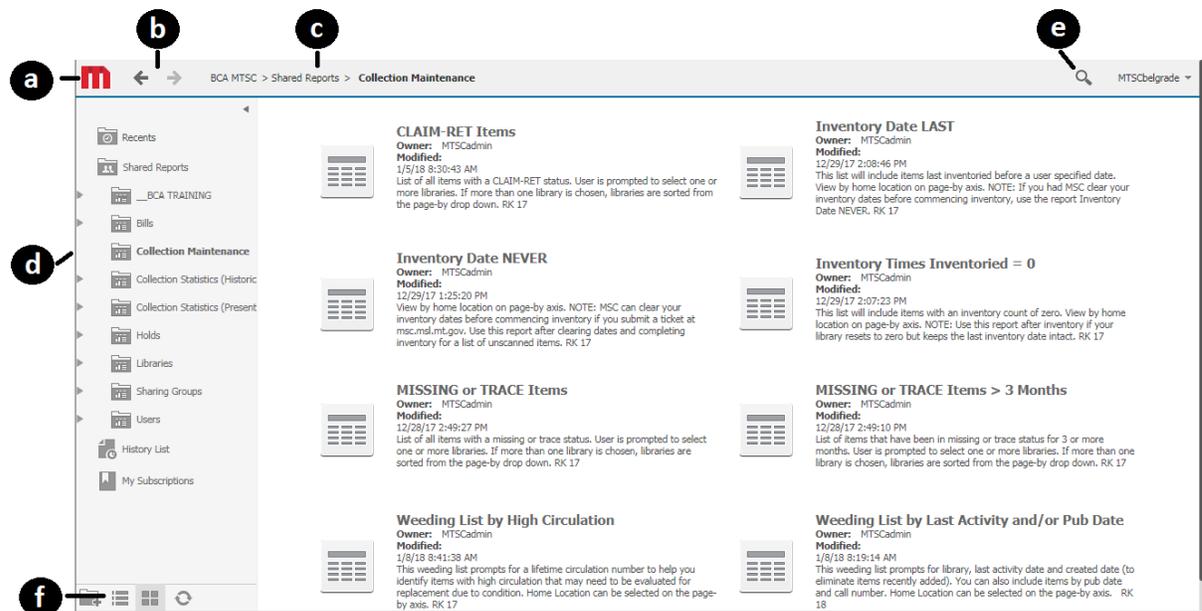


5. Your main page will have three folders: Shared Reports, History List, and My Subscriptions.
 - a. **Shared Reports:** These are reports that the MSC admins have built for you to run on demand. They are further organized in this folder by function. The MSC admins are continuously creating new report templates in this folder to meet the needs of the libraries in the consortium. If you are looking for a report that is not available here, please [Open a Help Desk Ticket](#) to request it.
 - b. **History List:** Where you will find finished reports that you have specifically saved in the History List. NOTE – This is not a reliable place to save reports long term. Reports saved here will often only be available until the end of the day on which you ran the report.

- c. **My Subscriptions:** Where you can see the reports that you have saved as a custom template, shared, or subscribed to.



6. On this main page, you will also find a left-hand menu that links to these three folders and a **Recents** folder, where you can see a history of the last few reports you ran and usually recover the most recent report that you ran.
7. Navigation: There are several ways to move around inside of the BCA program:
- Red "M" icon** – Click on this icon to return to the home page at any time. You can also hover over this icon to see a drop down arrow where you can choose a specific page in your history to return to.
 - Arrows** – These are forward and back arrows, just like an undo/redo button.
 - Navigation Map** – Tells you where you are in the program. You can click on any of the folders in this path to go back to that location.
 - Left hand menu** – Will show you what folder you are in and give you options to jump to other folders or similar reports.
 - Magnifying Glass icon** – Search for specific reports by name or description.
 - Folder View** – Choose list view or icon.

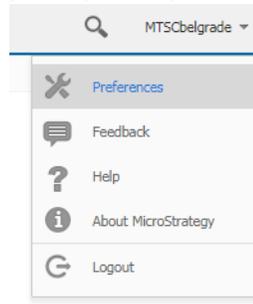


Mini Activity: Get Comfortable with Navigation

1. Open the Shared Reports folder.
2. Open the Holds folder.
3. Change the view from Icon to List. Then change the view back to Icon.
4. Hover over the red M (top left corner) and then click on the arrow that appears when you hover.
5. Choose Home to navigate back to your home page.
6. Now use the Search icon to search for “holds”.
7. Take a look at what comes up from this search. The search icon will search for all reports in the MSC consortia, but likely you will not have permission to look at MOST if not all of the results. Some belong to other libraries, some belong to the MSC admins, and some are pre-made reports from SirsiDynix that do not fit into the consortia configuration as delivered so we made versions of those reports that do work for our libraries. Anything that has a location of “Shared Reports” has a higher chance running for you, but likely you will only find this method of searching useful if you know the name of the report you want to run.

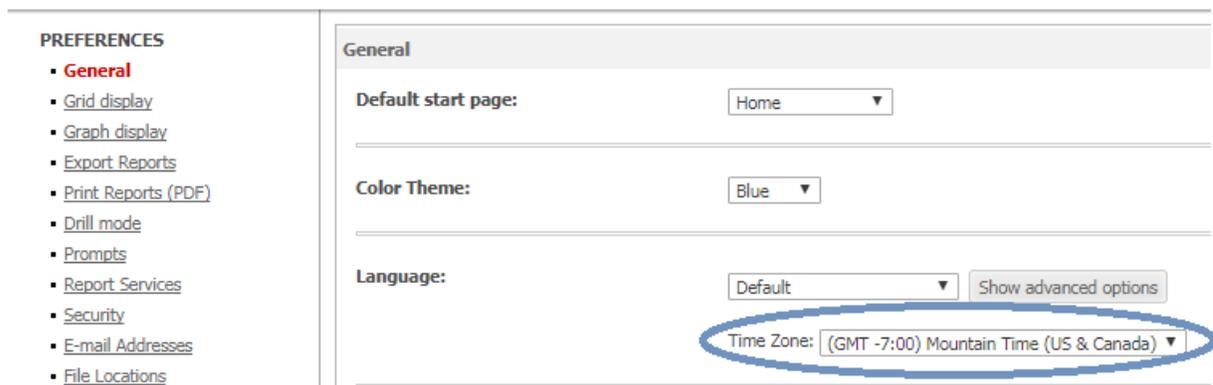
Account Settings:

1. In the upper right-hand corner, you will find your login name (MTSClibrary), click on the drop-down arrow to the right of your login.

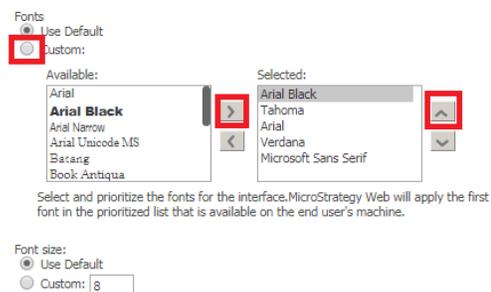


2. Choose Preferences.
3. Here you can change a lot of the “look” of BCA for your library’s login. These preferences are set for your whole library-wide log-in, not just your workstation like WorkFlows, so a lot of these preferences should probably remain as the default. One thing you will want to change is the Time Zone so you can schedule a report to run at a specific time of day without having to convert EST to your time zone.

General Preferences > Language section > Time Zone dropdown



4. Also in the General section of Preferences, you have option to change the Font Style. If you find that you do not like the fonts that BCA sets as defaults, you can come here to change them. Leave the four default fonts in the Selected list and just move your preferred font to the top of the list.



5. Save your changes at the bottom of the screen!

6. Now click on the E-mail Addresses section of the Preferences (on the left-hand menu).
7. If you want to email the results of a report to specific people in your library on a regular basis, you can add their emails here so you can quickly choose them from a drop down later.

PREFERENCES

- General
- Grid display
- Graph display
- Export Reports
- Print Reports (PDF)
- Drill mode
- Prompts
- Report Services
- Security

E-mail Addresses

Default	Address Name	Physical Address	Device	
<input checked="" type="radio"/>	Katy Rende	katy.rende@mt.gov	Generic email	Edit / Delete

[Add a New Address](#)

Mini Activity: Adding Email Addresses

1. In the Preferences menu, open the E-mail Addresses section.
2. Click on Add a New Address.
3. Type in the Address Name. This will be the name of the contact. You can use Testing as the name for this exercise if you do not want to add a recipient at this time.
4. The Physical Address is the email address of the recipient. Type in the recipient's email address or make one up if you are just testing today.

The screenshot shows the 'E-mail Addresses' section of the user preferences. The table contains one entry: 'Testing' with physical address 'testing@test.test' and device 'Generic email'. Below the table, there are input fields for 'Circulation Staff' and 'circulation@yourlibrary.org', and a 'Generic email' dropdown menu. 'Save' and 'Cancel' buttons are visible.

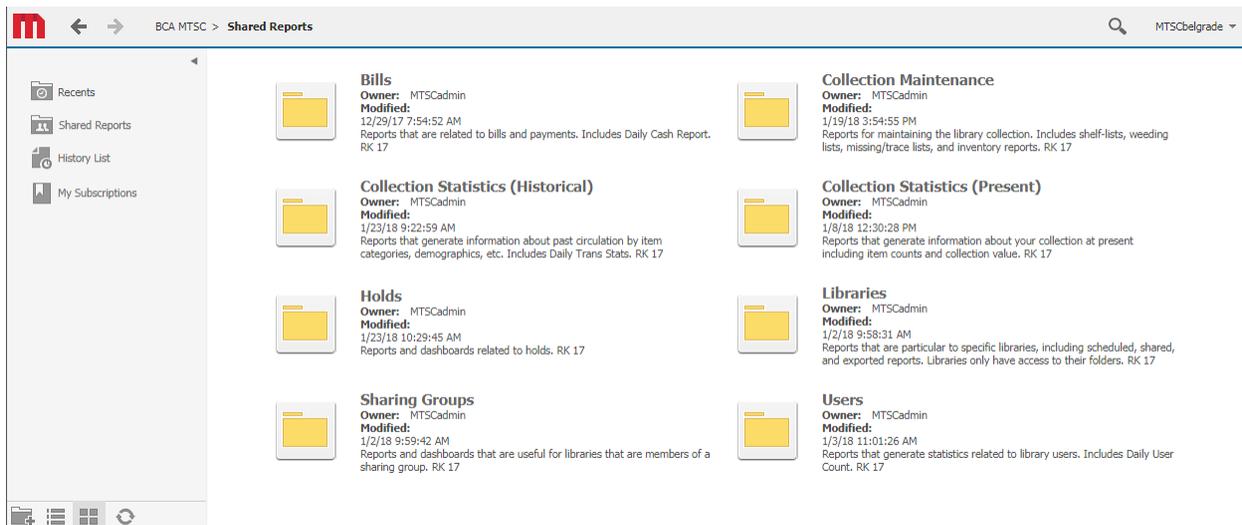
5. Click Save.
6. Notice that you can also Edit or Delete email addresses here. If you added a "testing" email address, you can click Delete now to remove it.

Shared Reports:

In the Shared Reports folder you will find all the reports that have been built by the MSC administrators for member libraries to customize and run. These reports are organized into folders by subject. All folders and reports in BCA also have a description and last modified date. These folders and reports can only be edited by MSC administrators. However, we encourage you to let us know if you need any modifications to the current reports, or would like to request additional reports. As all member libraries start using BCA, our hope is that we will get plenty of feedback so we can adjust the reports to work for the needs of all our member libraries. Feedback should be submitted as a [Help Desk Ticket](#).

The Libraries folder within Shared Reports contains a folder for your specific library that only you have access to. This is where you will find reports that were built specifically for your library or reports that have patron data, which will also have to be built for you. You must [Open a Help Desk Ticket](#) to request reports in this folder.

All reports in Blue Cloud Analytics are built to run on demand.



Types of Reports: There are two types of reports in the Shared Reports folder:

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Grid reports: These are your general Excel-style grid reports that present the information mainly in listed form. While you can turn these reports into a graph-style visualization, these reports are not optimized to be displayed as a visualization.
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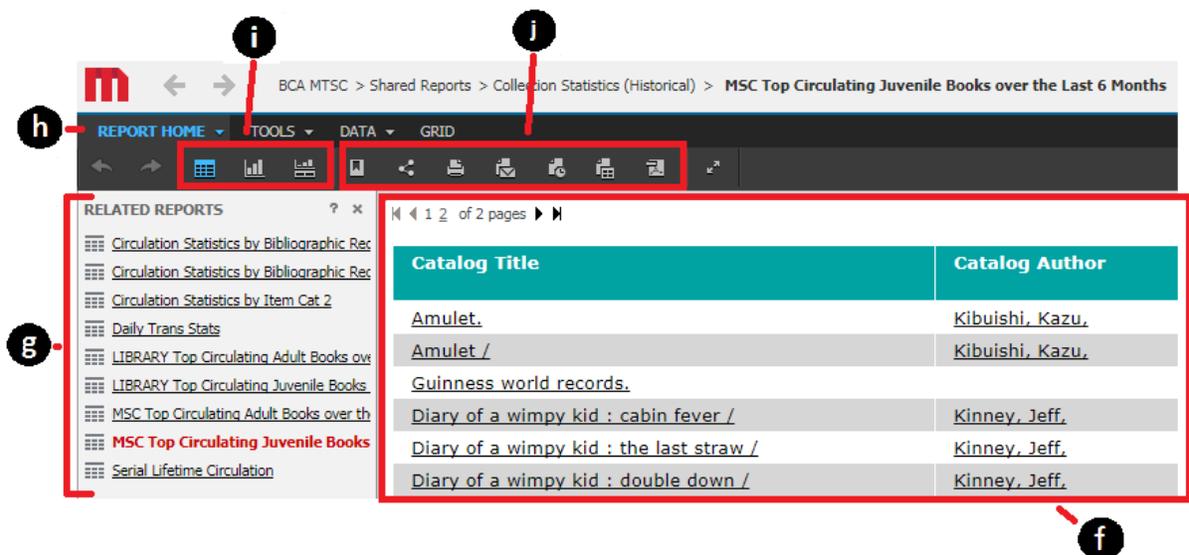
Graph reports: Reports that have been built for viewing as a graph/visualization. These reports usually have a separate Grid format available in addition to the graph format.

Report Navigation:

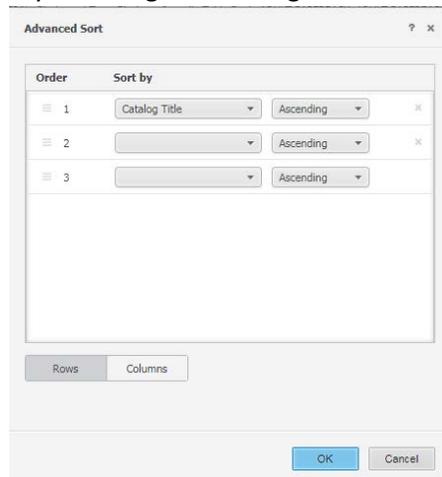
1. To follow along with this section on your own computer, please open the Shared Reports folder, then open the Collection Statistics (Historical) folder.
2. Find the MSC Top Circulating Juvenile Books over the Last 6 Months report. Clicking almost anywhere on the report icon, title, or description will run the report. If you hover over the report without clicking, you have additional links:
 - a. **Subscriptions:** Directly links you to any subscriptions or Personal Views that you have saved for that report.
 - b. **Send Now:** Will prompt you to enter an email address or choose one of the email addresses that you added to the [Preferences: Email Addresses](#).
 - c. **Export:** You can export the results to excel or word without running the report in BCA. This link opens a new window that prompts you to choose a format for the exported results.
 - d. **PDF:** Allows you to download a PDF of the results without running the report in BCA.
 - e. Clicking anywhere else on the report or report icon will run the report in BCA. On the finished report view, you will again have the option to Subscribe, Send Now, Export, or download a PDF, so you do not have to use these quick links.



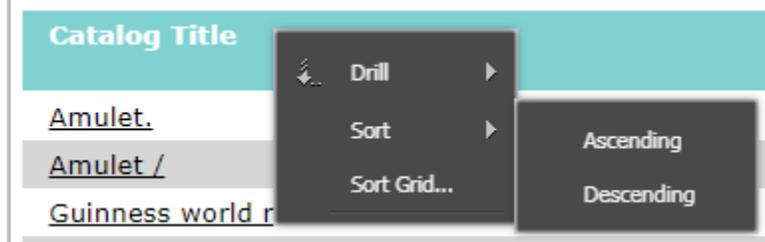
3. Run the report by clicking anywhere on the report except the four options a-d above.



4. The report will display in the default Grid format (like an Excel sheet) in the report window (f).
5. The left sidebar will now display some shortcuts to Related Reports (g) that you can run from here with one click.
 - You can also remove that sidebar by clicking the X in the upper right of that window, or hover over the edge of the window to resize it.
 - If you remove it, you can restore it from the TOOLS dropdown.
6. The black bar (h) where it says REPORT HOME are like the tabs on the top of Microsoft Word. Clicking on each tab just changes the tools that are available in the dark grey bar (i) and (j) just below those tabs.
 - Try clicking on the TOOLS tab, the DATA tab, and the GRID tab to see how the options change. Then go back to the REPORT HOME tab.
7. The one thing that stays the same across all those tabs is the report view icons (i). The options are the default Grid, Graph, or Grid and Graph (you can see what each icon means by hovering over it).
 - Try changing this report to each of those options.
8. The REPORT HOME tab also has sharing, downloading, and printing options in the dark grey bar (j). Hover over each icon to see what they mean. Choosing any of these options open a popup with additional questions concerning that delivery method.
 - Try clicking the Print icon. A new browser tab will open where you can choose options for printing the report, and then create the printable version.
9. Right-click on a column header to bring up sorting options. Choose “Sort Grid...”.
 - Try choosing the Catalog Title and Ascending to sort the results alphabetically by title.

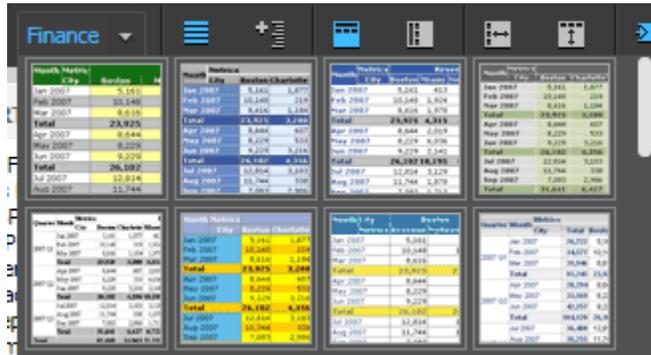


10. You can also right click on the column header at any time to Sort by just that column. Right click on the Number of Checkouts and hover over Sort to choose Descending. That will return us to the original results view where the items are ordered by number of checkouts.



11. In the GRID tab, there are different color options from the dropdown that currently says "Finance". The Finance style is the default style for all reports.

- Try clicking on a few different "styles" other than Finance to see the differences.



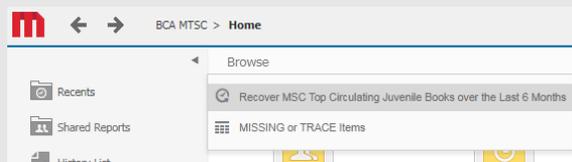
Mini Activity: Interruptions

You are working on customizing report when you get interrupted and have to leave your workstation. When you get back to the desk, you have been automatically logged out of BCA. Let's do some set up and then simulate this scenario.

1. Run the MSC Top Circulating Juvenile Books over the Last 6 Months report (Shared Reports > Collection Statistics (Historical)).
2. Change your report to a Grid and Graph format.
3. Change the view to Corporate. HINT: In the Grid tab
4. To simulate an interruption where you have to leave your computer for a bit, go up to your Account Settings dropdown and Logout. HINT: Upper right corner by your login name
5. On the Logged out screen, click Continue to log back in.
6. Enter your user name and password.
7. Enter the BCA MTSC folder.
8. Click the recover report banner in yellow above your folder icons.



9. Even though you did not save this report, it was recovered with all the changes you made intact.
10. You can also recover the report using the Recents folder. To do this, navigate back to the Home page. To get Home either ① click the red M ② click the dropdown next to the red M ③ click the back button or ④ click BCA MTSC on the top navigation map to the right of the back button. Please take a moment to find and recognize all of these options.
11. On the Home page, click the Recents folder which is on the top of the left-hand navigation bar.



12. Choose the Recover [Report Name] link.

Running Prompted Reports:

The report we just used as an example was for the entire MSC consortium, so you did not have to make any choices about the library or the information contained in that report. Most reports will at least require you to choose your library, and sometimes prompt you to choose what data you want to display. Let's take a look at some prompted reports.

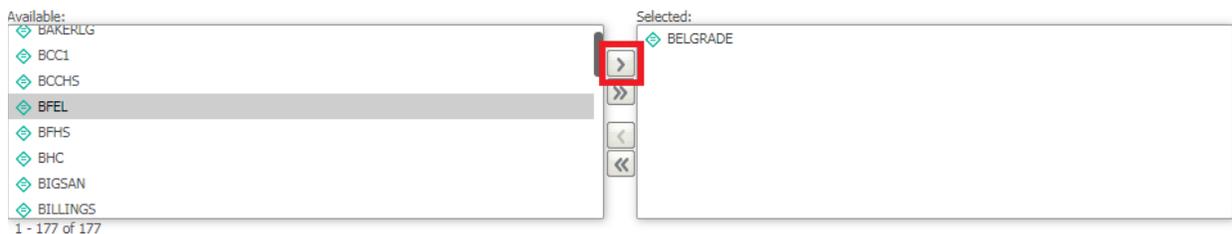
Single Prompt Reports:

1. Open the Shared Reports folder, and then the Collection Statistics (Present) folder.
2. Read the description and then run the Count Items by Home Location report.



Count Items by Home Location
Owner: MTSCadmin
Modified: 12/29/17 7:58:43 AM
 This report prompts users to choose a library. It then lists an item count for each home location. This report will also include a total count for the library's collection. RK 17

3. Instead of running the report right away, the report prompts you to choose your library. Scroll down to find your library code, highlight it, and then use the middle arrow to move your library to the Selected box.



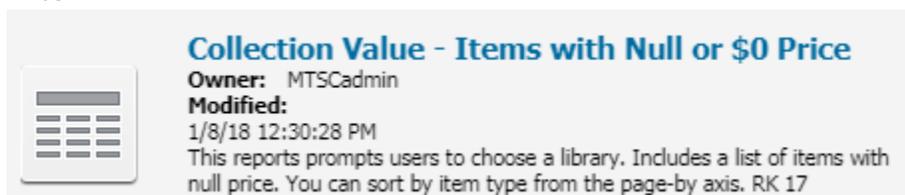
Available:
 ◆ BAKERLGG
 ◆ BCC1
 ◆ BCCHS
 ◆ BFEL
 ◆ BFHS
 ◆ BHC
 ◆ BIGSAN
 ◆ BILLINGS
 1 - 177 of 177

Selected:
 ◆ BELGRADE

4. If you have branches, or you want to see statistics for a group of libraries, you can select multiple libraries by highlighting each and using the right arrow to move them all over to Selected.
 - Try highlighting another library and adding it to the Selected list as well. Then move it back so you are only running this report for your own library.
 - To move ALL LIBRARIES to Selected or back, use the double arrow button.  
5. When your library code is in the Selected box on the right, click Run Report.
6. Take a look at the results if you would like, and when you are finished, return to the Home page.

Page-by Reports:

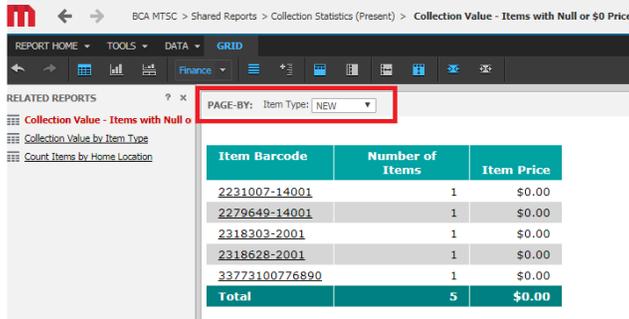
1. Open Shared Reports > Collection Statistics (Present) > Collection Value – Items with Null or \$0 Price



Collection Value - Items with Null or \$0 Price
Owner: MTSCadmin
Modified: 1/8/18 12:30:28 PM
 This reports prompts users to choose a library. Includes a list of items with null price. You can sort by item type from the page-by axis. RK 17

2. Read the report description and notice that it says the report is sorted by item type by the page-by axis.

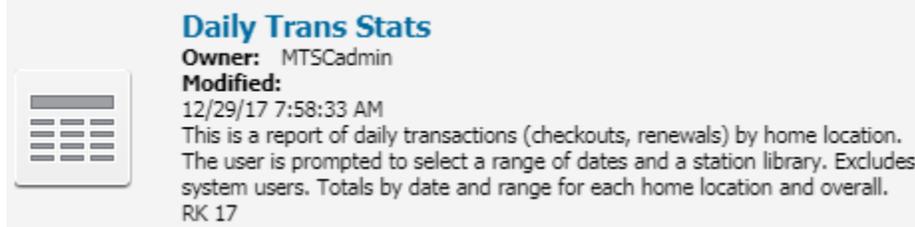
- Run the report for your library by selecting your library name and moving it over to the Selected box.
- At the top of the Results window, you have the option to view the results by Item Type. This is what is referred to as the Page-By axis in BCA. Use the drop-down to select different Item Types to display. "Total" will display all Item Types in one spreadsheet.



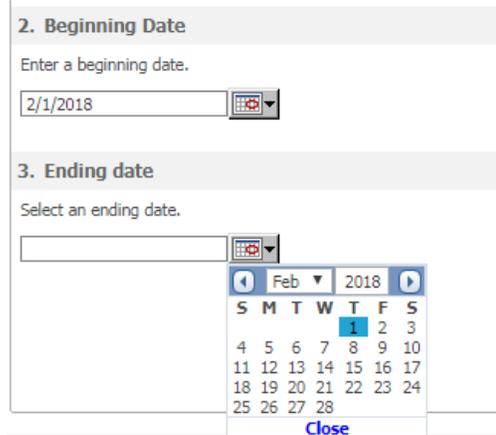
- These reports are built for all MSC libraries, but when you select your library from the prompt, the drop down will only include the Item Types that your library uses. Sometimes this is a good way to see if any items are cataloged incorrectly in your library.

Multiple-prompt Reports:

- Read and run the report Shared Reports > Collection Statistics (Historical) > Trans-Stats - Daily



- Select your library in the first prompt.
- Enter the Beginning Date that you would like to see results daily transaction statistics for by using the calendar icon and clicking on date.

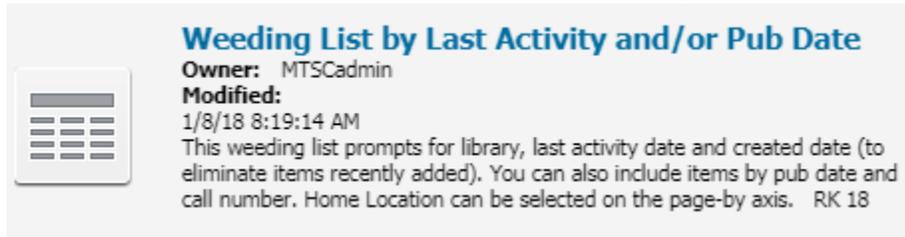


- Use the Ending Date calendar to choose an ending date for your transaction statistics. If you select the same date as the beginning date, it will display results for that one day only. If you select the next day, it will generate results for two days of transaction statistics.

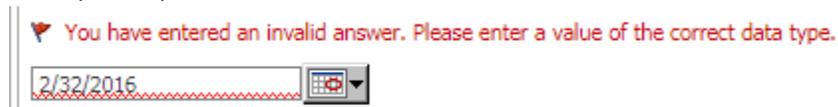
- Remember BCA does not run real-time statistics – it uses a nightly snapshot of the system information. You can't run reports for actions completed today.
- Notice on the left-hand menu bar you get a green flag after each prompt that was completed for this report. This can be a quick way to make sure you selected your library and entered the dates correctly.
 - Click Run Report.
 - This report will likely have multiple pages of information. Scroll through the pages to see the total on the last page.

Reports with many, many prompts:

- Run Shared Reports > Collection Maintenance > Weeding List by Last Activity and/or Pub Date



- This report has 6 prompts. The first one should be easy now. Select your library.
 - Each prompt has a description to help you decide what parameters you want to set in the report. This report allows you to create a weeding list by either Last Activity, Publication date, or both. That means each additional prompt after the library is optional.
- Set your last activity date to two years ago.
 - The last activity date is the last time an item was checked out, renewed, marked as used, or checked out to Display or Missing. It does not include inventory scans.
 - TIP – It takes a while to use the calendar to scroll through each month until you reach two years ago. Instead, click on today, and the use the date field to backspace the 2018 and change it to 2016.
 - Try typing in an incorrect date, like Feb 32. You will get a red flag and lots of red lines to warn you of your mistake.



- Set your Catalog Pub Year to 10 years ago. This will list books that are older than 10 years so you can assess them for damage or decide on their current relevance.
- Set the Item Created Date to 1 year ago. This will exclude any items that were added to your collection a year ago or less, even if they have never been checked out or marked as used.
- Set Beginning and Ending Call Numbers if you would like. These would be for if you are weeding your library by sections. For today, let's leave these blank.
- Run your report. You'll notice that this report also has a Page-by that separates the results by Item Collection (Home Location).

Re-prompting a Report:

This can be a pretty huge report, even for a small library. After looking at the results, I decided I want to change some parameters, but it is a lot of work to go back to the Home page, find this report, and fill in all of those prompts again. There are two ways to make adjustments without re-entering all of the prompts:

1. The back button:



- If you made any changes or looked at a few pages or item collections before you try to go back to the prompt page, you will have to hit back several times to get there.

2. The Re-prompt icon:

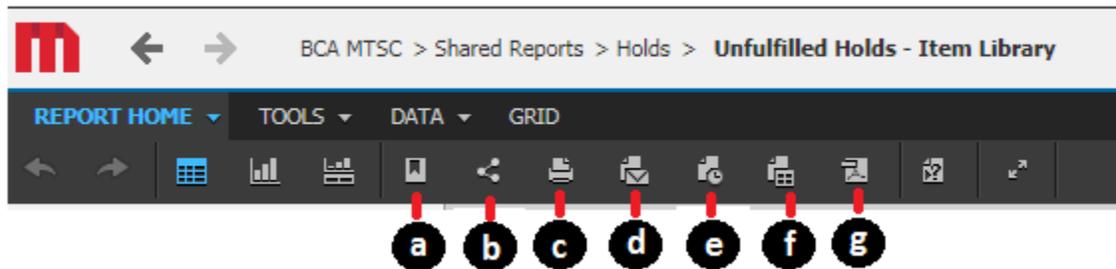


- In the Data tab, this icon looks like a piece of paper with a question mark.
- This is the quickest way to go back and re-prompt the report.

Sharing, Exporting, Saving, and Subscribing to Reports:

The options for saving and sharing reports are found in the Report Home tab of the finished report, or, as we discussed earlier, some of these options are available when you [hover over the report icon](#).

- a) **Create Personal View** – Saves the report template with your chosen prompts and choices of report view/sorting to your Personal View (in the My Subscriptions folder). This does not save the information in the report. When you click on a report saved to Personal View, the report will re-run and pull new information but format it like it was when you saved it.
- b) **Share** - Email, link, or embed the report. Emailing from here will open your email program and send a link to the recipient from your own email. The recipient will have to log in to BCA to view the report.
- c) **Print** – Choose your options and create a printable version of the report.
- d) **Send Now** – Email a non-downloadable image of the report from within BCA with the option of also providing a link to the report. The recipient will have to log in to BCA to view the report from the link. You can enter an email address or choose one of the addresses you saved in Preferences.
- e) **Schedule Delivery to History List** – Create a subscription to the report that will run on a regular basis (of your choosing). This report will show up in the History List folder after it runs, and the subscription can be modified in My Subscriptions.
- f) **Export** – Download the report in a variety of different formats, such as excel, csv, and text. As a general rule, you must Export a report to save it. Saving reports in BCA is not very reliable.
- g) **PDF** – Export the report as a PDF.



Exporting Reports:

Finished reports that you need to save for use on a later date should always be downloaded. BCA has a “Save to History List” function, but these reports are only saved in the History List for a short time and are unreliable at this time.

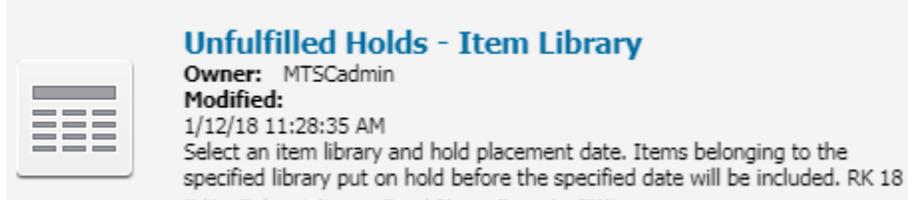
You can download (export) reports as:

- Excel with plain text (no colors or shading)
- CSV file format
- Excel with formatting (colors and shading)
- HTML

- Plain Text
- PDF

Let's work through exporting the results of a report.

1. Run the report Shared Reports > Holds > Unfulfilled Holds – Item Library



- This report will give you a list of items that have been on hold for the amount of time that you specify but have not been fulfilled. You might run this report if you want to investigate why the item is not available for the patron.
2. Select your library from the list, and select a Hold Created Date of one to two months ago. Then click Run Report.
 - If you are a small library, there's a chance that you will not get any results in this report. Feel free to select a larger library and run the report for them instead if you need to. Use the back arrow or the Re-prompt button to select a different library.
3. In your finished report, open the Report Home tab.

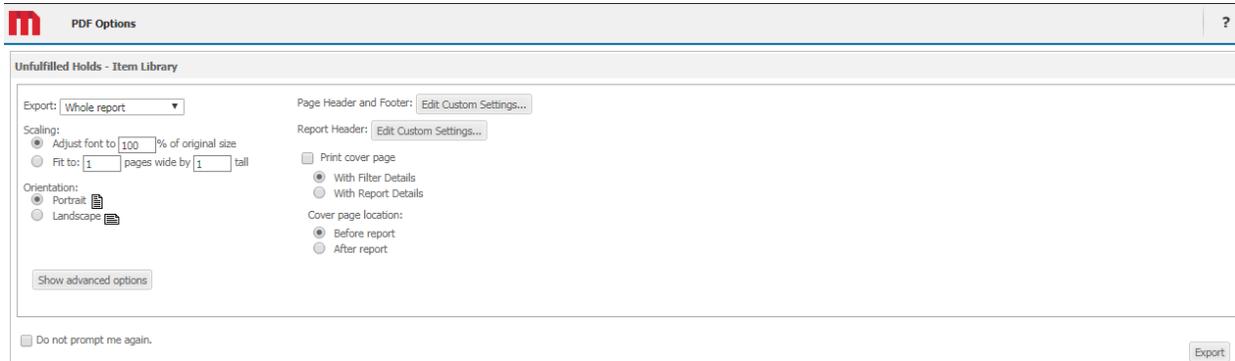
4. Click on the Export icon. 
5. This will open a new tab in your internet browser with some options for how to format your report. You can choose how much of the report to export, the format, and other details.
 - You will probably always want "Whole report" selected in that first drop down. The other option, "Portion displayed only" will only export the data you can see on the screen when you chose to export.
 - Try downloading the report as an Excel with plain text and then as an Excel with formatting to see the difference.

- The check box "Export filter details" will list the details that you entered into the prompts when you created the report on the top of the results. This can be a helpful way to double check that you created the report correctly and a reminder of what results are in the report if you are going to save it for later.
6. In **Page-by reports**, you will have some additional check boxes in the Export Options.

- “Expand all page-by fields” will print a report with all the page-by reports in one excel sheet. Leaving this box unchecked will just print the page you are currently viewing.
- If you choose Excel with formatting and “Place each page on a separate sheet” (in the second column of options), the page-by report will print each page on a separate tab in the excel sheet.

7. Close that export tab and click on the PDF icon. 

8. Again, you will have some options concerning the look and scope of the report. Click Export when you are ready.



The screenshot shows the 'PDF Options' dialog box. At the top left is the 'm' logo and the title 'PDF Options'. Below that is a header 'Unfulfilled Holds - Item Library'. The main area contains several sections: 'Export' with a dropdown menu set to 'Whole report'; 'Scaling' with radio buttons for 'Adjust font to 100% of original size' (selected) and 'Fit to: 1 pages wide by 1 tall'; 'Orientation' with radio buttons for 'Portrait' (selected) and 'Landscape'; 'Page Header and Footer' with a button 'Edit Custom Settings...'; 'Report Header' with a button 'Edit Custom Settings...'; 'Print cover page' with an unchecked checkbox; and 'Cover page location' with radio buttons for 'Before report' (selected) and 'After report'. At the bottom left is a checkbox 'Do not prompt me again.' and at the bottom right is an 'Export' button.

Mini Activity: Page-By Report Practice

1. Run the report Shared Reports > Collection Statistics (Present) > Collection Value – Items with Null or \$0 Price
 - This is a page-by report with all your items that do not have an item price. If your library does not have any items in this report, choose another library for this practice.
1. Click the Export icon
2. Choose Whole report, excel with plain text, export report title, export Page-by information, export filter details, and expand all page-by fields. Scroll through the results to see how the report separates each page-by option.
3. Go back to your report and export again but this time choose Excel with formatting and keep all of the other options but add “Place each page on a separate sheet. Take a look at the results by using the tabs at the bottom of the excel sheet.

Sending Reports:

There are two options for sending reports: Send Now and Share.

NOTE: Both send options work by saving the report in the History List and then linking the recipient to the “saved” report. They require that the recipient log in to BCA and view the report by the end of the day on which the report was generated. If the recipient logs in a day or two after you send the report, the report will likely have an ERROR next to it and will not be viewable. Please download and save reports to your computer and send them from your own email to avoid this error.



Send Now - Sends the report from BCA to a specified email address. You will either choose from the email addresses stored in BCA or add a new one. When the email is delivered, it will be from "Distribution Services" saas-smtp@bc.sirsidynix.net and show the report right in the body of the email.

Wed 2/14/2018 2:20 PM

"Distribution Services" <saas-smtp@bc.sirsidynix.net>
Unfulfilled Holds - Item Library

To Rende, Katy

Unfulfilled Holds - Item Library

Hold Created Date	Catalog Title	Catalog Author	Catalog Pub Year	Item Barcode	Hold Range	Hold Pickup Library Code
2017-11-25	Flight of the honey bee /	Huber, Raymond,	2013	33773100679177	GROUP	BOZER

From Send Now, you can also send the report to your History List and include a link to the History list for the recipient of the email. The recipient will have to log in to BCA to view the report in the History List by the end of the day. The report will be unavailable after the nightly BCA update.

When you send a report using Send Now, the email address you sent the report will be stored in your BCA preferences until you go in [and remove it](#).



Share – Allows you share a link to the report from your own email, or embed the report as an iframe in a webpage. Emailing or linking the report will require that the recipient log in to BCA.

Share: Unfulfilled Holds - Item Library

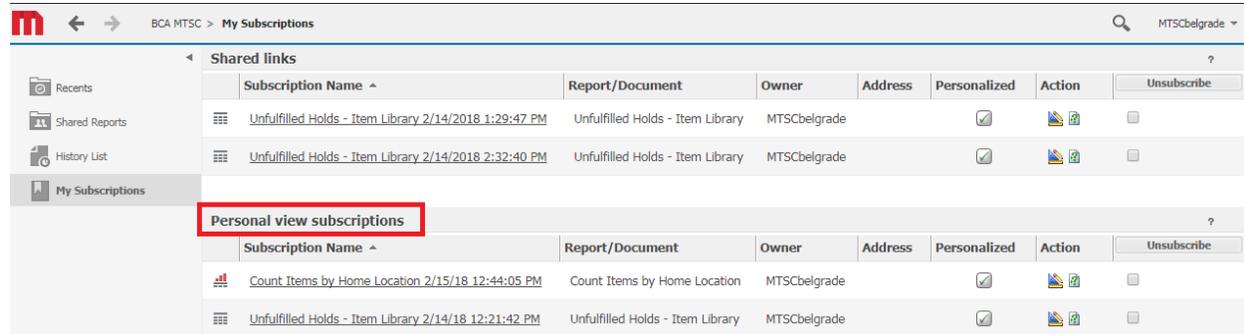
Share By

Email | Link | Embed

Close

My Personal View:

Remember when we edited the view of a report, or the colors, or how the results were sorted? You can save those changes in My Personal View so that when you run that report again, it will retain that formatting but with new data.



The screenshot shows the BCA MTSC interface with the 'My Subscriptions' folder selected. The 'Personal view subscriptions' section is highlighted with a red box. Below it, a table lists subscriptions with columns for Subscription Name, Report/Document, Owner, Address, Personalized, Action, and Unsubscribe.

Subscription Name	Report/Document	Owner	Address	Personalized	Action	Unsubscribe
Unfulfilled Holds - Item Library 2/14/2018 1:29:47 PM	Unfulfilled Holds - Item Library	MTSCbelgrade		<input checked="" type="checkbox"/>		<input type="checkbox"/>
Unfulfilled Holds - Item Library 2/14/2018 2:32:40 PM	Unfulfilled Holds - Item Library	MTSCbelgrade		<input checked="" type="checkbox"/>		<input type="checkbox"/>

Subscription Name	Report/Document	Owner	Address	Personalized	Action	Unsubscribe
Count Items by Home Location 2/15/18 12:44:05 PM	Count Items by Home Location	MTSCbelgrade		<input checked="" type="checkbox"/>		<input type="checkbox"/>
Unfulfilled Holds - Item Library 2/14/18 12:21:42 PM	Unfulfilled Holds - Item Library	MTSCbelgrade		<input checked="" type="checkbox"/>		<input type="checkbox"/>

You will find saved Personal View Subscriptions in the My Subscriptions folder. Just click on the name to run the report with the saved formatting. These Personal Views will not expire like My History reports. If you want to change the report prompts, use the reprompt icon in the Data tab after you run the report.



Creating and Managing Subscriptions:

Creating reports that run regularly is possible in BCA, but the functionality is limited. If you would like to set up a regular report, please [Open a Help Desk Ticket](#). The MSC admins can help you decide what the best way to run a subscription report is and set it up for your library.

There are two places where reports are saved for you in BCA: History List and My Subscriptions. The My Subscriptions folder is where you will find records of Shared Links, your Personal View Subscriptions, and History List Subscriptions. Anything that you “Save to History List” will be in the History List. Additionally, there is a limit on how long a report will remain available in the History List. Sometimes they are only available for the remainder of the day on which you ran the report.

PLEASE Export/download all reports that you need saved.

Mini Activity: Report Practice

4. Practice downloading a Bills report:
 - Run the Daily Cash Report in the Bills folder. Set the report to run for a week sometime in the past month or so.
 - Download this report as a PDF.
5. Practice sorting a shelf list report:
 - Run the Shelf-List report in the Collection Maintenance folder.
 - View your NON-FICT collection from the Page by menu.
 - Reorder the non-fiction shelf list by last checkout date in ascending order.
6. Save a Personal View of a report:
 - Run the LIBRARY Top Juvenile Holds report in the Holds Folder.
 - Change the report to “Grid and Graph” view.
 - Change to the Romantic view.
 - Turn on banding.
 - Create a Personal View of that report to save these settings. Name the report “TESTING”
 - Return to the Home page.
 - Open My Subscriptions and run your Personal View report called TESTING.
 - Return to My Subscriptions and delete the TESTING Personal View.

Subscription Name	Report/Document	Owner	Address	Personalized	Action	Unsubscribe
Count Items by Home Location 2/15/18 12:44:05 PM	Count Items by Home Location	MTSCbelgrade		<input checked="" type="checkbox"/>	  	<input type="checkbox"/>
TESTING	LIBRARY Top Juvenile Holds	MTSCbelgrade		<input checked="" type="checkbox"/>	  	<input checked="" type="checkbox"/>
Unfulfilled Holds - Item Library 2/14/18 12:21:42 PM	Unfulfilled Holds - Item Library	MTSCbelgrade		<input checked="" type="checkbox"/>	  	<input type="checkbox"/>

BCA Terminology Visual Guide:

Call Number = Item Call Number

Class Scheme = Item Call Class

Item ID = Item Barcode

Type = Item Type

Home Location = Item Collection

Item Library = Item Library Code

Current Location = Item Status

Total Charges = Item Legacy Total Charges (note: since 7 Dec 2007)

Item Cat1 - 5 = Item Category 1 - 5

Date Created = Item Created Date

Date Last Charged = Item Last Checkout Date

Date Due = Checkout Due Date

Last Discharged = Item Last Checkin Date

Date Inventoried = Item Last Inventory Date

Last Activity = Item Last Activity Date

Item Info	Circ Info	Bills	Checkouts
Counters			
Total bills:		1	
Orders:		none	
Controls:		none	
Checkouts:		none	
Bookings:		none	
Holds:		none	
Item Statistics			
Ongoing checkouts:		5	
Ongoing renewals:		3	
Checkouts to date:		0	
Renewals to date:		0	
Date last cleared:		1/4/2016	

Ongoing checkouts = Item
Lifetime Checkout (note:
since 17 Jan 2010)

Ongoing renewals = Item
Lifetime Renewals (note:
since 17 Jan 2010)

Both of these "to date"
numbers do not mean
anything in the MSC. Please
ignore these statistics.

Please take some time to think about some reports you would like to be able to run on demand for your library. You can write them down here, and we will finish up by discussing where those reports will run and how to run them. If you are working through this course on your own, please feel free to [Open a Help Desk Ticket](#) to discuss any questions about BCA or library reports.