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Instructions for Subscribing to Reports via Email in BLUEcloud Analytics (BCA)

Revision Date: July 25, 2016

Note: Emails from BLUEcloud Analytics in your inbox show as being sent from the user name of ‘MicroStrategy Distribution Services’ and come from the email address DistributionServices@MicroStrategy.com. Sometimes various providers route these emails to your spam folder and require you to whitelist/allow the emails. Depending on your email provider or your school’s IT setup, you may need to provide those two bits of information to allow emails from BCA to be delivered.

1. Go to BCA: https://na1-microstrategy.bc.sirsidynix.net/bcanalytics/asp/Main.aspx

2. Login with your user name (RSA-XX-yyy) and password.

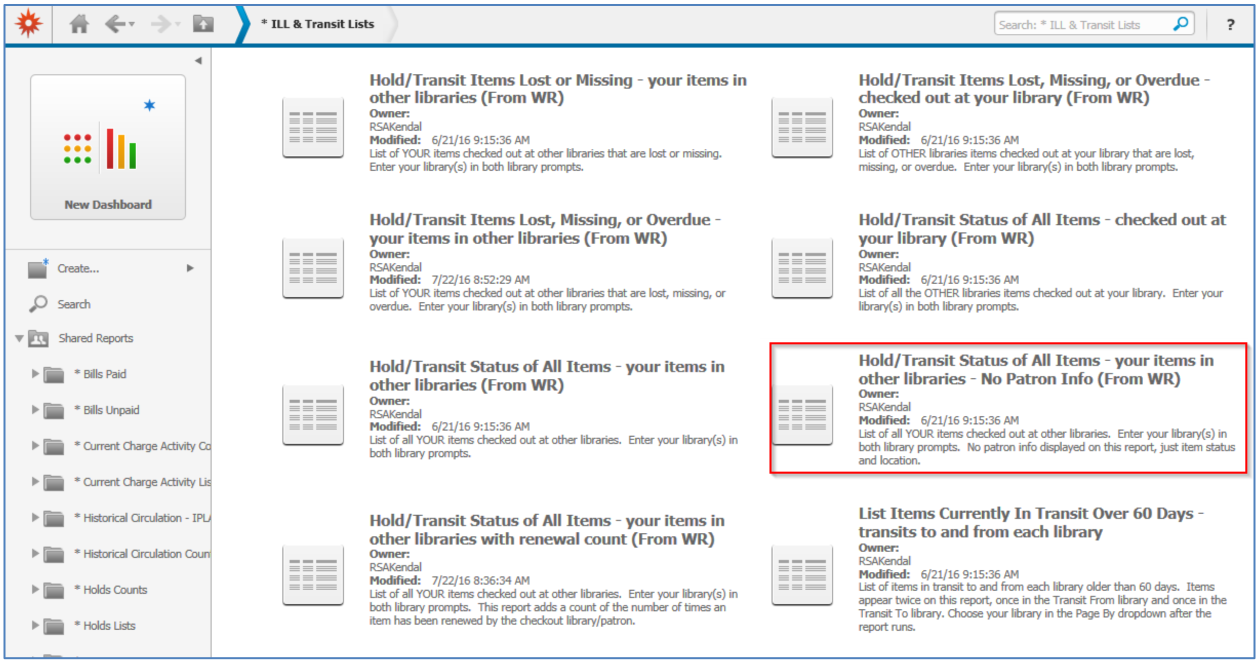
3. If more than one project shows up, choose the “BCA RSA” project. Any other project that may show up here is for testing or development purposes and does not have current data.

4. After logging in, select the folder containing the report you would like to schedule via email delivery: Shared Reports, My Reports, or My Subscriptions. In most cases, you will open the Shared Reports folder. Navigate thought the subfolders to find your report, then click on the report title to run it.

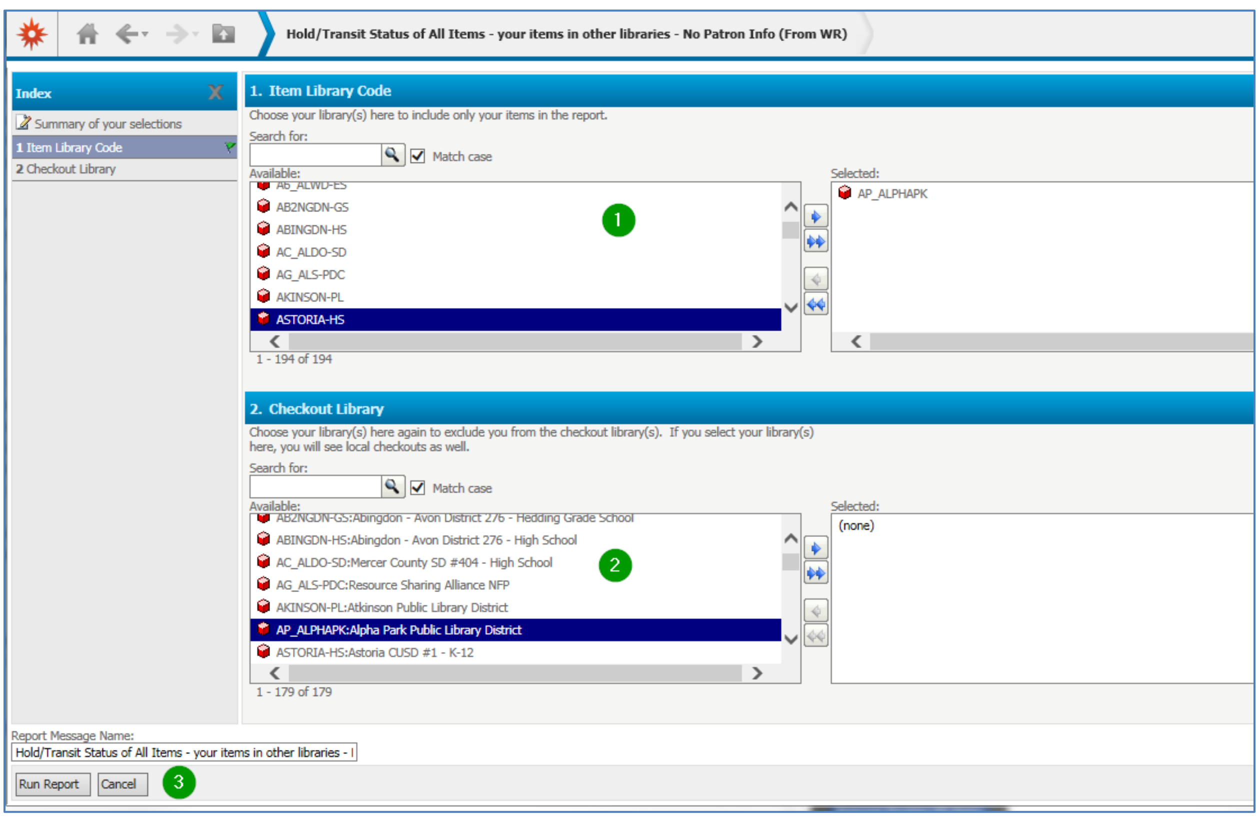
   4a. In the Shared Reports folder, we have setup many folders with counts or lists of various aspects of our system. There are additional folders for end of month/quarter/year and other specific areas. Folders may be empty until SirsiDynix finishes development for all aspects of data in our system.

   4b. For example purposes, click the ‘Shared Reports’ folder, then the ‘* ILL & Transit Lists’ folder, then click on the report titled “Hold/Transit Status of All Items – your items in other libraries – No Patron Info (From WR)”.

   4c. Notice the (From WR) in the title of the report. As we move reports over from Web Reporter, we are giving them more descriptive names and descriptions and noting these with the (Form WR) in the title to help you match up reports you may have been running or getting via email from Web Reporter. FYI, emails from Web Reporter arrive in your inbox from the user ‘Narrowcast Administrator’ with email Kendal.orrison@railslibraries.info.



5. Once you start the report, the report will either run with no further interaction on your part or show the filter prompt page allowing you to customize the report output. Generally speaking, most reports contain prompts you must answer to filter the data to your library or users. End of month stats reports sometimes run for all libraries in RSA and do not have any prompts to answer.



5a. This report has two prompts, one for your library(s) to limit to your items, the other to limit checkouts to all other libraries but your library(s). In callout #1 (green circle) above, you can see that I've clicked AP_ALPHARK in the left Available side of the first prompt, then clicked the single blue right arrow to move that selection to the Selected side of the prompt. Had I clicked the blue double right arrows ALL the options on the left would have moved to the right. The blue single and double left arrows just below move one selected item or all items back to the Available listing.

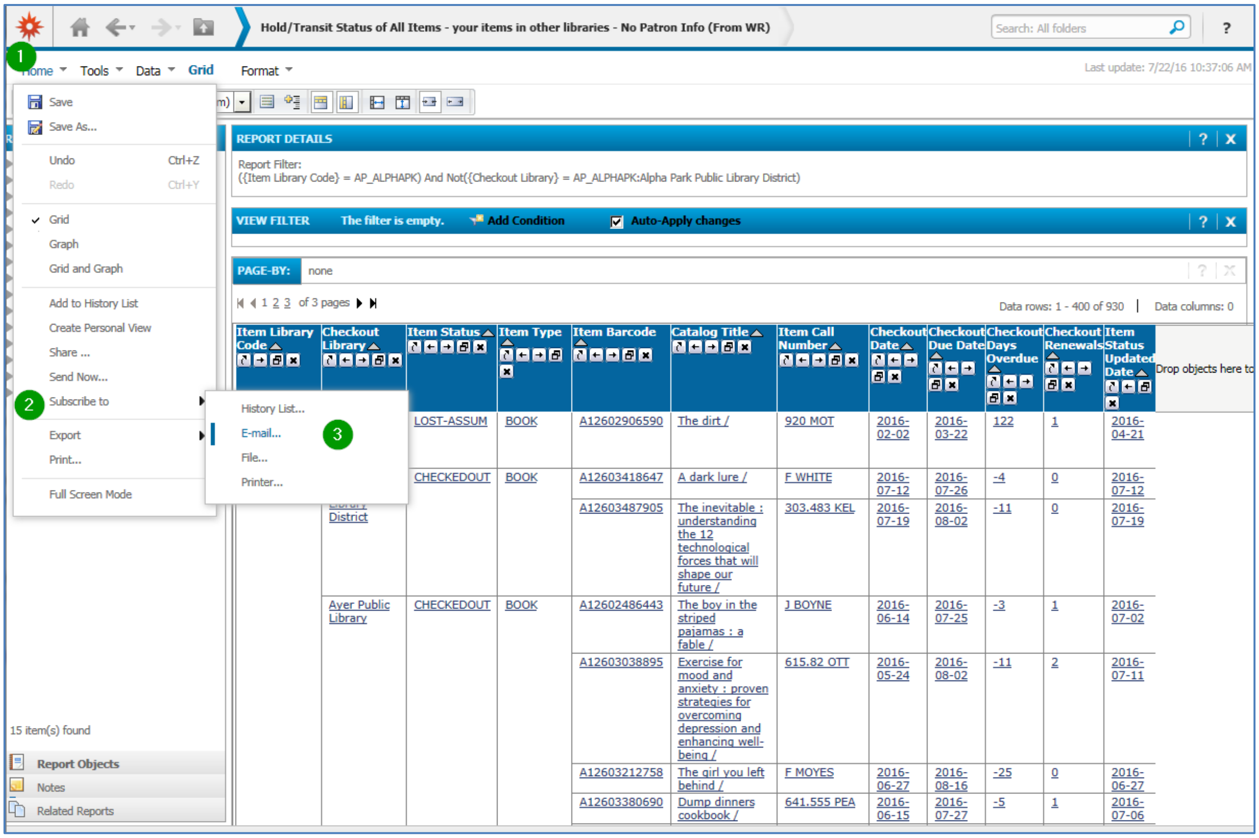
5b. Callout #2 shows that I've selected Alpha Park again to exclude checkouts there from the list. I still need to either click the blue single right arrow to move my selection to the right panel or simply double click Alpha Park to move it over. Also note that the data is slightly inconsistent in some places including this prompt. The first prompt showed just short system codes while this prompt shows both the short system code and the full description. Eventually these data inconsistencies will be corrected as SirsiDynix moves from active data adding/developing to more of a refining mode on this new product.

5c. Many reports have required prompts. These must be answered prior to running the report. Required prompts show red "Required" text next to them.

5.d. Callout #3 shows the Run Report button in the lower left of the report screen. For reports with multiple prompts, this button isn't visible without scrolling down to the bottom of the page. The Run Report button will ALWAYS appear at the bottom left of the page, if you don't see it, you need to scroll down. When you are happy with your prompt answers click the Run Report button to run the report.

NOTE: Scheduled reports need to have moving date ranges (dynamic date range) or they will report the same data each time they run. If a report asks for specific dates in a range you cannot use the report to set up a subscription. Unless, of course you are looking for a report of something like checkouts up to X date for end of school year or something. In other words, if you provide specific dates for a range, the report you get emailed to you will only cover that specific date range. We have set up special reports with date ranges that move to define a date range (previous 30 days, previous 12 months) for this purpose. If you want to a subscription to a report that does not offer the dynamic moving date range please contact RSA to have a report created for your purposes.

6. Once the report is finished running, review the data shown to ensure it is what you expected. If it is, then you can schedule the report by clicking the Home menu (callout #1 below), then Subscribe to (callout #2) then clicking the E-mail (callout #3) option. The other three options aren't useful. In fact, neither Subscribe to File or Printer work at all.

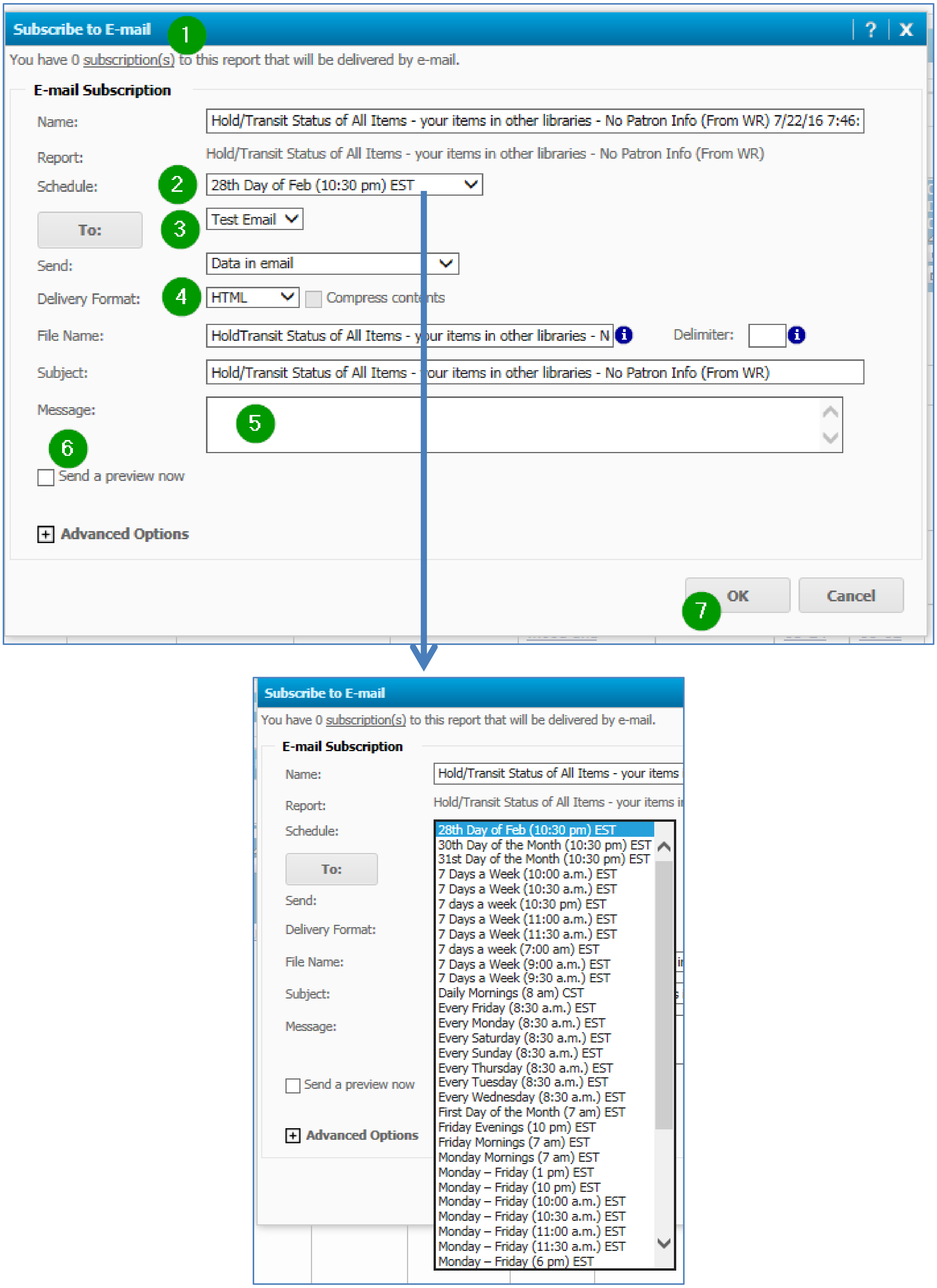


7. Once you've selected the email option, the Subscribe to E-mail window will open allowing you set up all the information about this subscription.

   7a. Callout #1 shows the number of subscriptions you have previously setup for this particular report. In most cases it will be zero. However, there may be cases where you have subscribed to the same report but specified different filtering criteria in the prompts. For example, a shelf list showing only Books and another version of the same report showing all your DVD's and Blu-Rays.

   7b. Callout #2 shows the Schedule dropdown. You'll need to adjust this to the schedule you'd like to receive the report on. The 2nd screenshot below shows some of the schedules currently available. Note: we currently only refresh the data once a day at 1:30am. In the future we may refresh the data more often making the times on the schedules more meaningful.

   7c. Callout #3. Shows *the name associated with an email address* the report will be sent to. The first time you schedule a report you will need to add your email into the system by clicking the "To" button. Anytime you schedule a report and want to send it to a new email address, you'll need to add that address in as well. You can add more than one recipient here by clicking the "To" button first. The email addition screen will be covered after the rest of this window is covered.


Subscribe to E-mail
1
You have 0 subscription(s) to this report that will be delivered by e-mail.
E-mail Subscription
Name:
Hold/Transit Status of All Items - your items in other libraries - No Patron Info (From WR) 7/22/16 7:46:
Report:
Hold/Transit Status of All Items - your items in other libraries - No Patron Info (From WR)
Schedule:
2
28th Day of Feb (10:30 pm) EST
To:
3
Test Email
Send:
Data in email
Delivery Format:
4
HTML
Compress contents
File Name:
HoldTransit Status of All Items - your items in other libraries - N
Delimiter:
Subject:
Hold/Transit Status of All Items - your items in other libraries - No Patron Info (From WR)
Message:
5
6
Send a preview now
Advanced Options
OK
7
Cancel
Subscribe to E-mail
You have 0 subscription(s) to this report that will be delivered by e-mail.
E-mail Subscription
Name:
Hold/Transit Status of All Items - your items
Report:
Hold/Transit Status of All Items - your items i
Schedule:
To:
Send:
Delivery Format:
File Name:
Subject:
Message:
Send a preview now
Advanced Options
28th Day of Feb (10:30 pm) EST
30th Day of the Month (10:30 pm) EST
31st Day of the Month (10:30 pm) EST
7 Days a Week (10:00 a.m.) EST
7 Days a Week (10:30 a.m.) EST
7 days a week (10:30 pm) EST
7 Days a Week (11:00 a.m.) EST
7 Days a Week (11:30 a.m.) EST
7 days a week (7:00 am) EST
7 Days a Week (9:00 a.m.) EST
7 Days a Week (9:30 a.m.) EST
Daily Mornings (8 am) CST
Every Friday (8:30 a.m.) EST
Every Monday (8:30 a.m.) EST
Every Saturday (8:30 a.m.) EST
Every Sunday (8:30 a.m.) EST
Every Thursday (8:30 a.m.) EST
Every Tuesday (8:30 a.m.) EST
Every Wednesday (8:30 a.m.) EST
First Day of the Month (7 am) EST
Friday Evenings (10 pm) EST
Friday Mornings (7 am) EST
Monday Mornings (7 am) EST
Monday – Friday (1 pm) EST
Monday – Friday (10 pm) EST
Monday – Friday (10:00 a.m.) EST
Monday – Friday (10:30 a.m.) EST
Monday – Friday (11:00 a.m.) EST
Monday – Friday (11:30 a.m.) EST
Monday – Friday (6 pm) EST

7d. The “Send” dropdown should be left set to: Data in email.

7e. Callout #4 is the Delivery Format of the report data. You can select from the following data types:

HTML: Shows the report in the body of the email about the same as on the screen.

PDF: Converts the report into a PDF file and attaches the PDF to your email. In most cases, the PDF will be in landscape format.

Excel: Converts the report to a Formatted Excel file and attaches the .xls file to your email. Formatted Excel files don’t do Excel sorting well in some cases due to rows/columns being merged to make the output look nicer.

Plain Text: Sends the report as plain text in the body of your email.

CSV: Converts the data to CSV format in the body of your email.

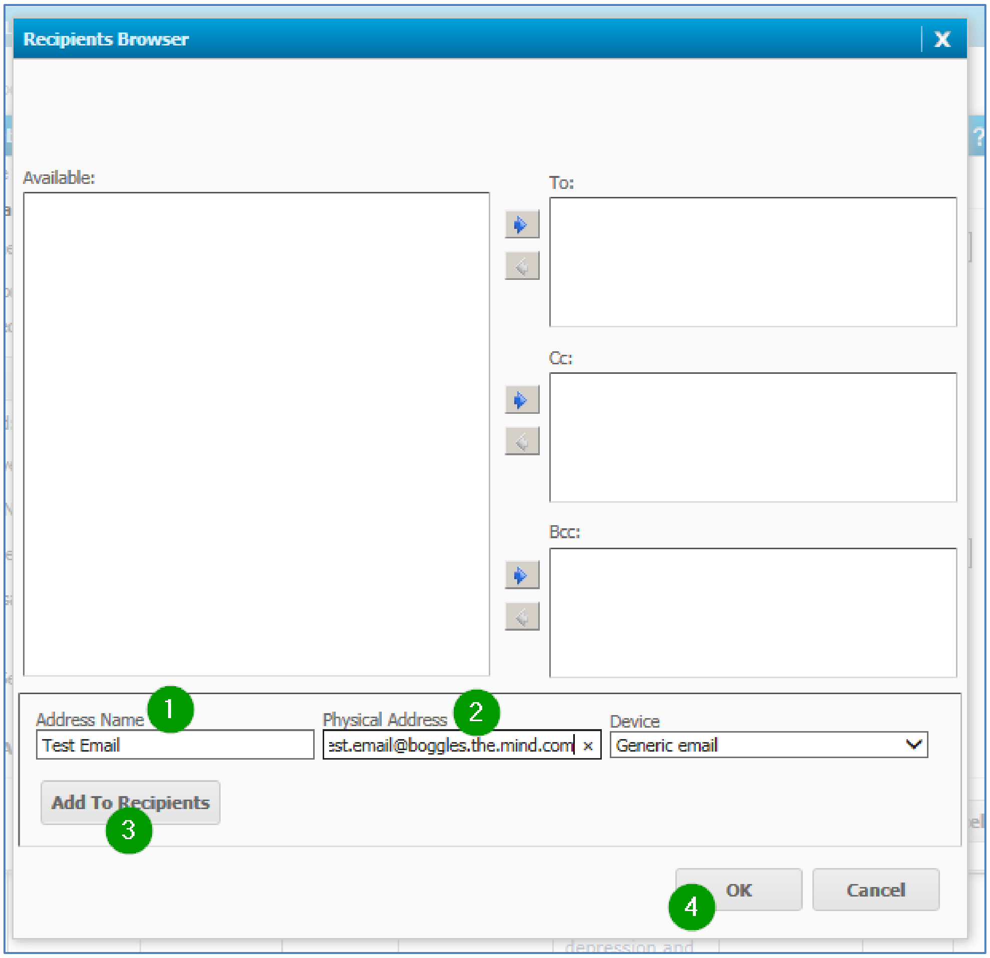
7f. You’ll note 3 places where the title of the report is listed. The top one, Name, is what shows up in your list of scheduled reports, the File Name specifies what the PDF or Excel attachment will be called, the Subject is what the subject of the email sent to you will be called. If you change the Subject wording, it’s a good idea to also change the Name at the top to match so you can easily find the report you got in email in your Scheduled reports list.

7g. Callout #5 allows you to enter a short (150 or so character limit) message to appear at the top of the email. You can use this to remind you what you’ve scheduled or remind someone else who you are scheduling for what you’ve signed them up for.

7h. Callout #6 shows the “Send a preview now” checkbox. If you check this box, the report will be scheduled to run on the Schedule you setup but will also send a copy, within 5 minutes usually, of the report to the person(s) scheduled to receive the report.

7i. Callout #7 is the “OK” button. Click this after reviewing your settings. Remember to double check the schedule, recipients, and Delivery Format of the data. These are the options most frequently forgotten during setup. Once you click the “OK” button, the report will be subscribed and an entry will appear in your My Subscriptions folder.

8. Email addresses in the system for your user login. There are two ways to see, add to, or edit your list of available email addresses. As part of scheduling a report for email you can click the “TO” button to open the window (as shown below) or you can go to Preferences, E-mail Addresses to see a list of your current addresses. The Preferences route allows you to manipulate your list of addresses without having to run a report first.



8a. Since this is the first time we've tried to schedule a report, we don't have any emails in the system. After you add an email, you'll be able to select form the list of current emails in the Subscribe to E-mail window's email drop-down listing.

8b. Callout #1 is the person's name field for the email address. This is what you'll see in the dropdown box in the Subscribe to E-mail window. If you are going to use multiple different email addresses for the same person, you should name them accordingly here (i.e. Sharon Home, Sharon Work).

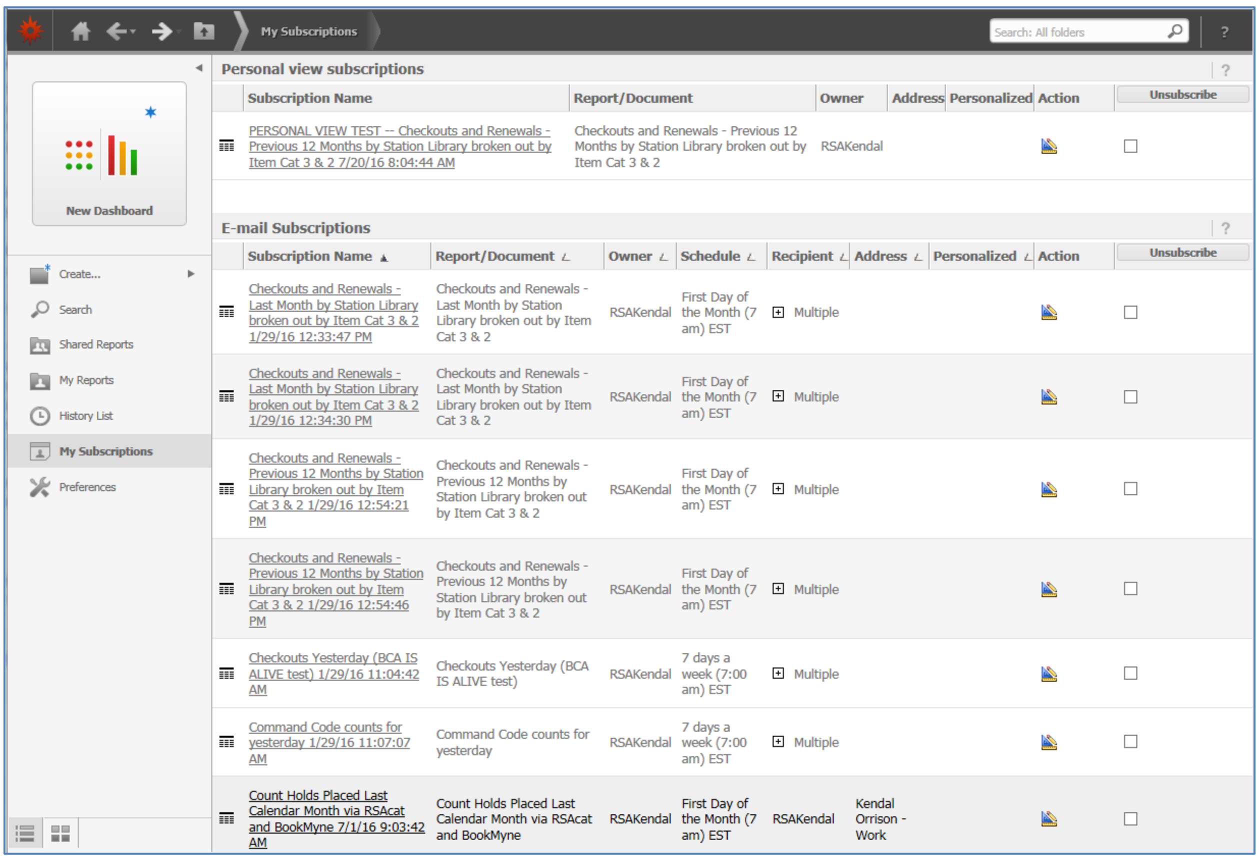
8c. Callout #2 is the actual email address for the person. It says Physical Address, don't let that fool you, it's actually their email address.

8d. The Device dropdown should be left at Generic email as this option works the best. There are options for Microsoft Outlook and more, but just leave it set to Generic email.

8e. Callout #3 is how you add the email address you just typed in in steps 8b – 8c into the To: panel in the top right. Click the Add to Recipients to add this email address to the To panel. If you have additional email addresses to send this same report to, you can continue to put in their real name, email address, then click the “Add to Recipients” button to move them into the To panel.

8f. When you are finished adding emails, click callout #4, the “OK” button. Clicking the “OK” button closes this pop-up and returns you to the Subscribe to E-mail window. Once you go back, the person or persons you added will appear in the email window already selected.

9. Once you’ve finished scheduling the report, you can close out of the report you are working with and run another. If you want to verify that you actually did set up a subscription, click the House icon to go back to the home screen, then click the My Subscriptions icon and look for the name of the report you just scheduled. The screenshot below shows a partial listing of the emails I have scheduled for my BCA user. Notice the subscriptions are divided into logical groups. I have both a Personal view saved (a pre-filled in prompts report) and many email subscriptions.



10. If you want to cancel a previously subscribed report, click the box in the Unsubscribe column next the report and then click the “Unsubscribe” button.

11. Clicking the name of the report runs the report with the prompt values you had entered when you setup the subscription. Clicking the blue triangle and pencil icon opens a window that allows you to edit the prompts and scheduled times for that

subscribed report. To edit the prompts, click the edit icon, then click the "Personalization" line just above the OK and Cancel buttons to display the prompts. If you have a report listing items of a particular item type and wished to add another item type to that report, you could edit the prompt values with the edit icon and select the new item types.

12. Another way to edit just the prompt values is to click the green question mark icon to open up the prompt screen with you current settings.