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BLUEcloud Analytics (BCA) User Reference Guide

Revision Date: January 2025

BCA Login Link: https://alsi-bca.bc.sirsidynix.net/bcanalytics/asp/Main.aspx
RSA Support BCA page: https://support.librariesofrsa.org/project/bluecloud-analytics

User Names: Are individual to the user. User logins are PERSONAL and access **will be terminated** for any user who shares their user name and password. RSA can't block access to the server like we do with Workflows. We must control access via individual user logins and strong passwords.

Passwords: Each password is long and complex. DO NOT CHANGE YOUR PASSWORD without RSA approval. Long, complex passwords protect library and user data.

Product info: BLUEcloud Analytics is built using the MicroStrategy reporting platform. This is the same software used by many Fortune 500 companies, converted to library use.

Privileges All Users Have: View, run, and save personal copies of Shared Reports. Can export reports to a printer, in Excel, PDF or other formats, and create scheduled reports delivered via email. You can send emails to yourself or others in your library from any report you've already run. Users can remove fields from an already run report and save their customized version in their My Reports folder or as a pre-prompted Personal View. Users may also create View Filters to further modify the reports output or limit output in some way. Finally, user may remove, or modify, the formatting of the displayed report, saving a personal copy of the report Personal View of the modified, prompted report.

PII Users: Users who have both a library PII agreement and a personal signed PII agreement have access to additional reports. All of these reports are available in the *6 Reports Containing Patron PII folder. There are subfolders for reports relating to Circulation, Holds, School Libraries, Users Bills, and User Lists.

Reports vs Dashboards: These are different ways to view your data. Reports are static, grid-based Excell equivalents while Dashboards are interactive and usually allow for on-the-fly tweaking of displayed data via the use of live filters. Think of reports as "Excel spreadsheets on steroids" and Dashboards as reports with mixed media, columnar data, graphs, pie-charts, and more all on one page. Dashboards are designed to be viewed online or as an exported PDF document with one chart of graph per page. Reports are generally designed to be exported as Excel or PDFs.

Note: you can only subscribe via email to Reports or Dashboards via the BCA main site. You can log into individual Dashboards via the links on the BCA page of the Support Site, but can schedule a dashboard from that interface.

Data freshness: Data is refreshed each night around 1am. RSA is currently working on a beta test with SirsiDynix to explore the option to have data be only minutes old. But for now, until otherwise mentioned, you are looking at yesterday's data.

Browser Requirements: Most modern browsers are supported, you should use either Chrome, Edge, or Firefox. Please ensure your browser is always up-to-date via it's auto-update function to keep BCA and your library patron's data secure.

BCA Terminology: BCA is designed to work with both Symphony and Horizon library automation systems. Some terms will be familiar Symphony terms, others might be Horizon terms or new BCA terms descripting things in both systems.

SirsiDynix has created a Data Reference Guide that explains all BCA terms and shows what data they point to in our Symphony database. There is a copy of this guide linked on the BCA page of the RSA support site. However, all you really need to know is our cheat sheet.

RSA created a "BCA to Workflows Terminology Cheat Sheet" to show how common WorkFlows displays convert to the associated BCA terms. You'll want to download a print out a copy of this cheat sheet.

Some common BCA Terms and hoe they appear in Symphony are as follows:

<u>Item Attributes (BCA name → Symphony/WorkFlows name):</u>
Item Barcode → Item ID
Item Call Class → Class Scheme
Item Collection → Home Location
Item Notes → Public Notes
Item Shelving ID → Call Number
Item Status → Current Location
Item Stat Period Checkouts → Checkouts This Calendar Year

<u>Catalog Attributes:</u>
Catalog Flex ID → Title Control Number

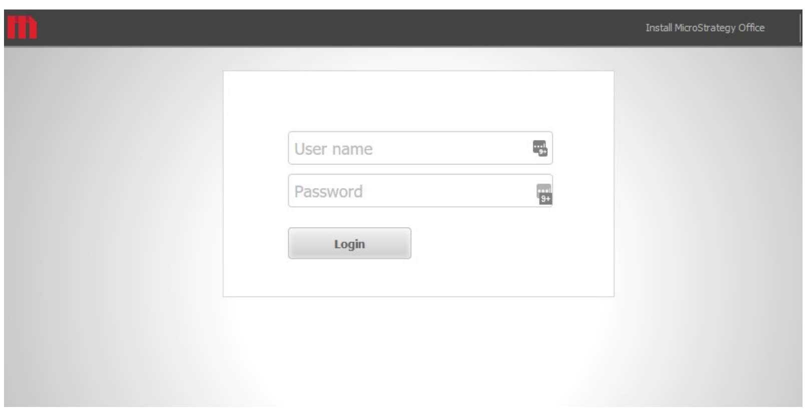
<u>Trans (Stat) Attributes:</u>
Trans Stat Icat 2 → Item Cat 2 (Reading Level)
Trans Stat Icat 3 → Item Cat 3 (General Format)
Trans Stat Station Library → Checkout Library

A special note about the "Beginning of Time". Any date in BCA that shows as 1/1/1900 means NEVER. I.E. in the Last Activity Date column, 1/1/1900 means the item has never been scanned in Workflows. In fields like user expiration, 1/1/1900 means the user never expires. BCA uses 1/1/1900 as the beginning of time as well as the default display for no time data available.

Can I Mess Things Up? NO! BCA works from a snapshot of our Symphony database and does not change Symphony data. You can play to your heart's content and the worst thing that will happen is that you mess up the look up your report and have to start again or reload the saved report to refresh back to a previous or the delivered look. You shouldn't (knock on wood) have the ability to overwrite any delivered report, only your own reports. In other words, you shouldn't have the ability to mess up anybody else, only your own saved reports.

The Login Process:

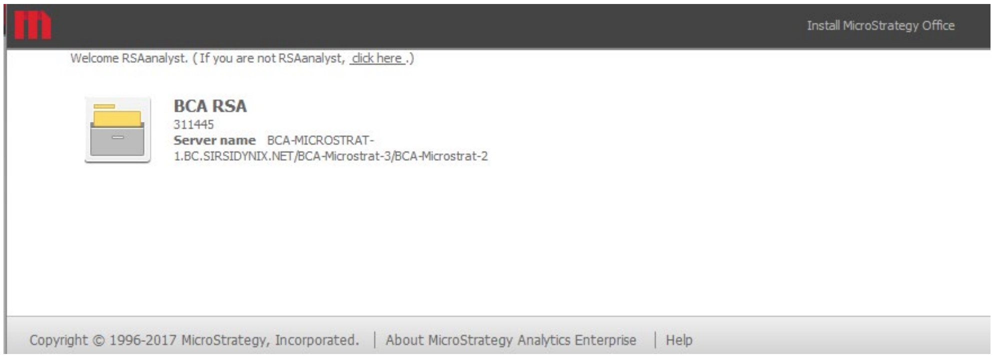
Go to the BCA link shown above or linked on the RSA Support Site BCA page. You can bookmark the page before you sign in for quick access.



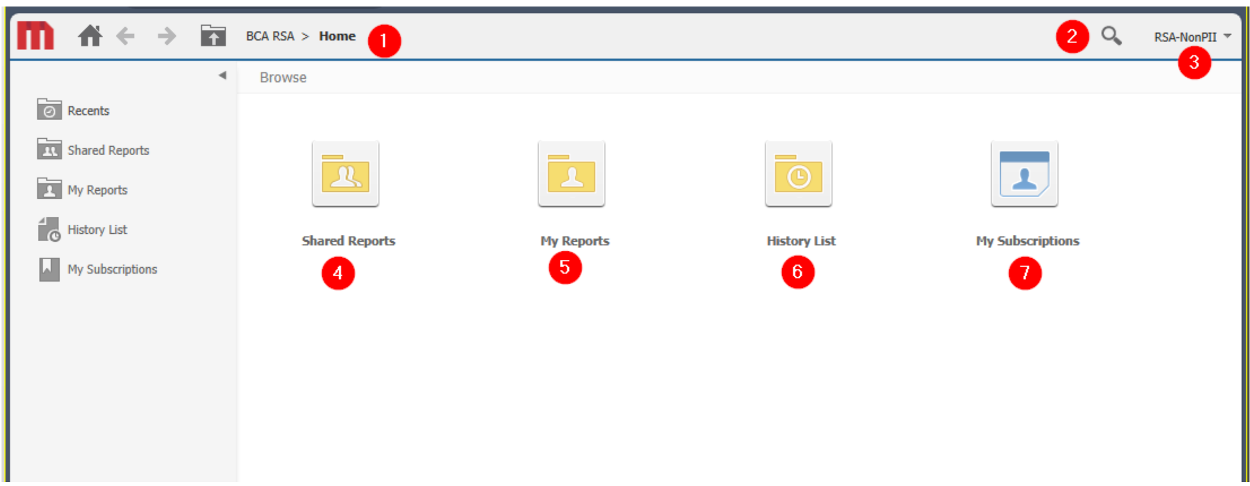
Enter your User name and Password, then click Login. Please note, if you cut and paste your Password in from an email and it doesn't work, the most likely reason is that an extra space gets added at the end when you do that. If you try to log in but are unsuccessful 3 or more times your account will be disabled and you'll need to contact the Help Desk (help@rsanfp.org) to request your account be re-enabled.

Once you log in, you should see a project selector page OR be dropped right into BCA if you were already using BCA in your browser and got timed out.

Select the **BCA RSA** project from the list of projects shown. Usually that's the only option, but occasionally there may be more than one project shown when RSA is working on a special project of some type.



Major BCA Home Page Elements:



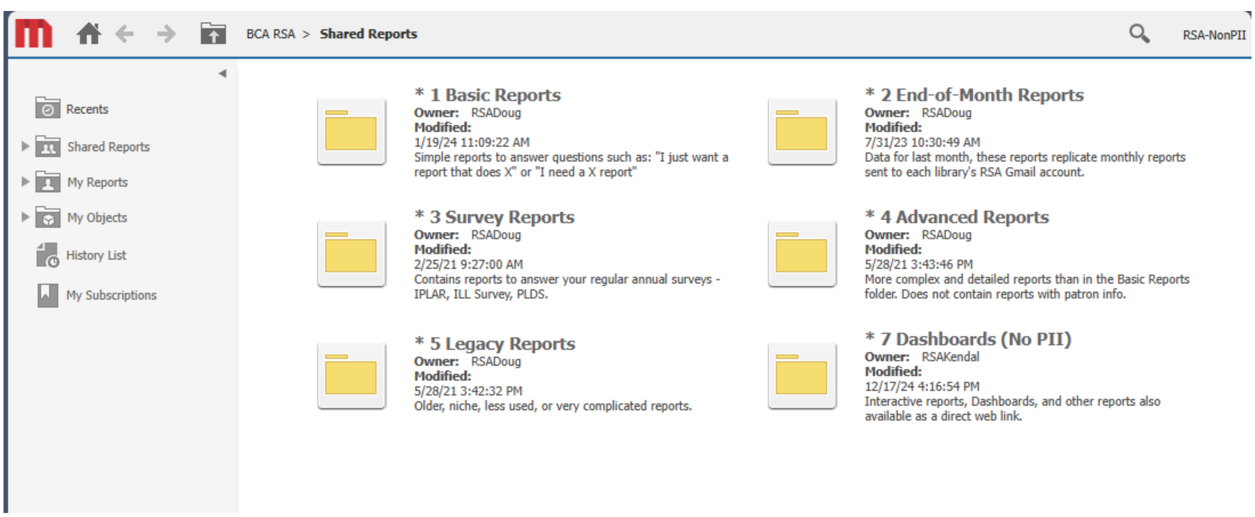
1. **Menu bar and site navigation link:** Clicking the big reddish M opens a dropdown with direct links back to the major items shown on the rest of this screen from any point in BCA including when you are viewing a report. You can use this from any place in the system to jump somewhere else. The house icon brings you back to this home screen. The arrows move you back and forward in your current session history. The folder with the up arrow takes you up one folder in the structure from your current point. The text starting with "BCA RSA" shows your current location in the report file system. If you are in a report you can click the name to see the entire path and jump to another folder in the path.
2. **Search Bar:** If you can't remember where a report is stored, you can type a part of the report title and click the magnifying glass to see a list of reports and folders that match your search terms. A word of caution, MAKE SURE THE REPORT YOU SELECT STARTS WITH THE "Shared Reports>" in the location column. Otherwise you are likely running an pre-production or developmental version of a report and will be missing data!
3. **Preferences:** Your preferences have been pre-set during the initial setup of your user account. You should only change settings here after notification from RSA staff. ***Note,***

changing preferences can break your user account. Do not adjust without consulting RSA staff.

4. **Shared Reports:** This is where all the premade report templates developed by RSA staff show up. There are various sub-folders of reports. This includes the harder to use versions of the Dashboard templates.
5. **My Reports:** If you save a copy of a report template with your filter choices, or layout modifications, this is where you'll save to. You can make sub-folders to better organize your saved reports.
6. **History List:** NOT USED IN RSA's CONTEXT. It is possible to subscribe to a report without sending it via email. If you do so, that report will run at the scheduled time and then place a link to the report on this page. Reports send to the history list are only valid for about 4 hours, then the data is stale, incorrect, or randomly refreshed. You can't 'store' a reports data here. To store a reports data, you MUST export the report.
7. **My Subscriptions:** This is where you view all the reports you subscribed to as well as the reports you saved via the Person View option. From this screen, you can click the title to rerun the report WITH TODAYS data, change the subscription schedule, or remove one or more subscriptions.

Running Reports:

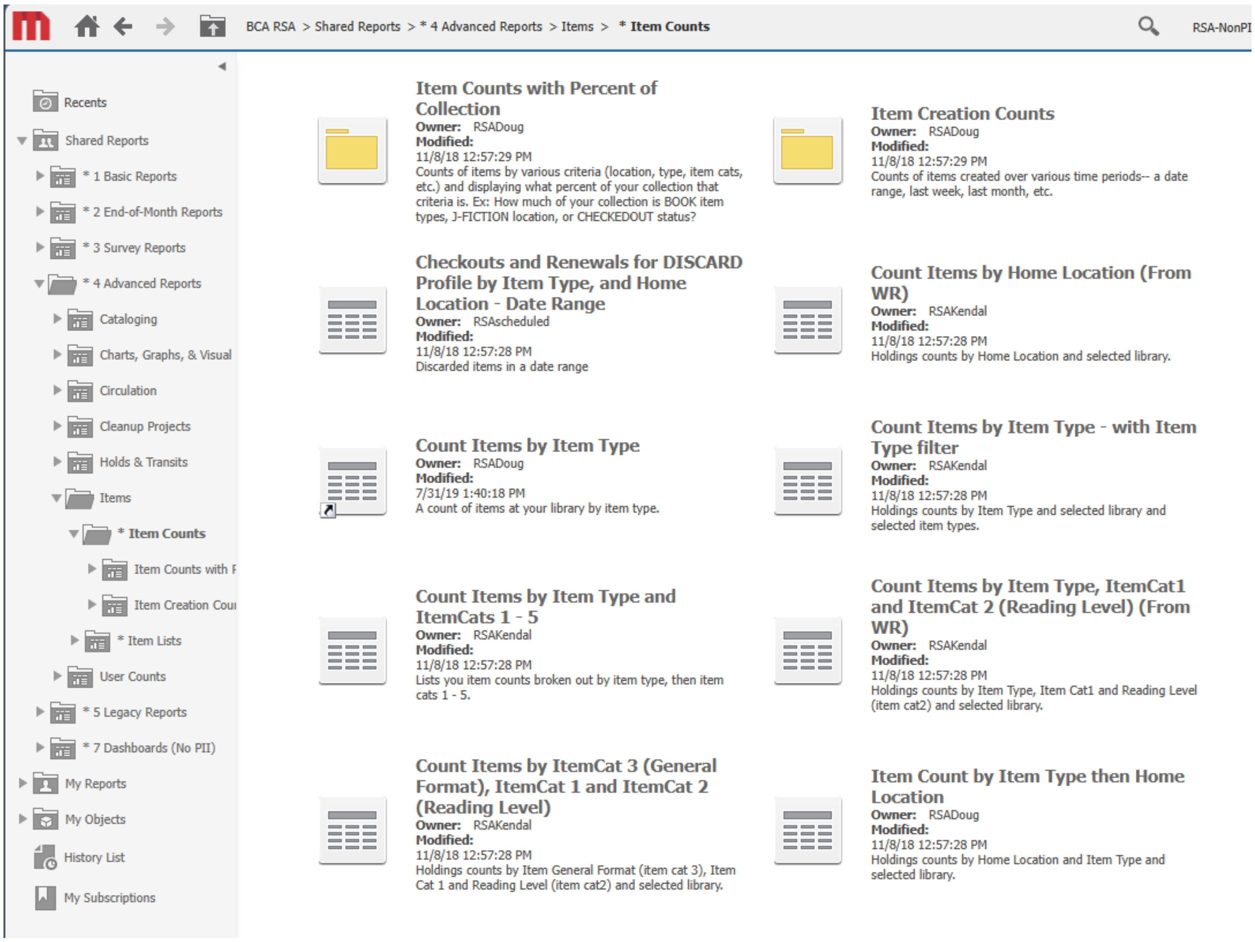
Click the Shared Reports Folder on the home screen to open all the reports developed by RSA staff.



Folders *4, *5, and *6 (if you have PII access) all contain subfolders to separate reports into groups. In general, RSA breaks reports into count reports and list reports as they show different levels of detail.

To run a report, select the folder to look through the reports it contains. Once you see the report you want, click the title of the report to run it. For example, here is the '*Item

Counts' folder and some of the reports it contains. Note the menu bar contains the full folder structure, clicking any part jumps back to that folder.

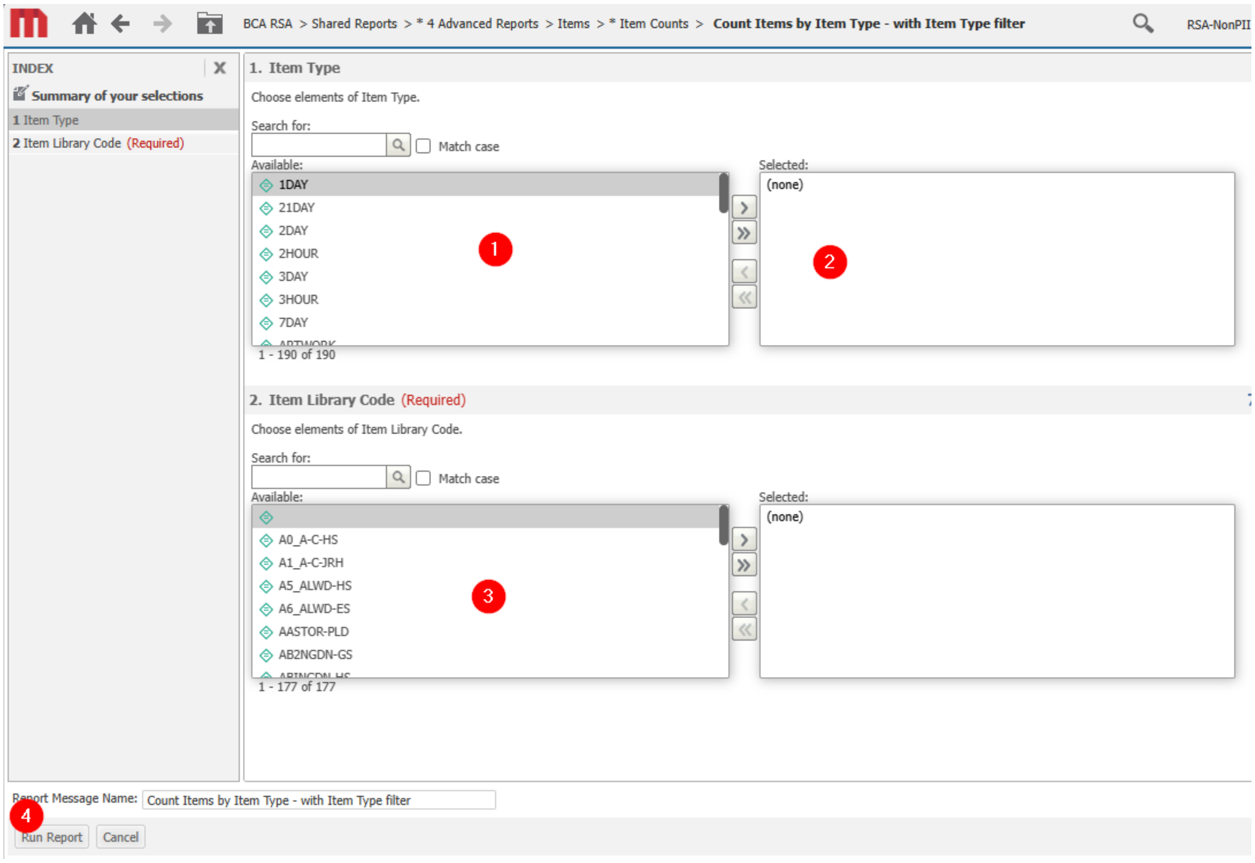


Almost all reports require the user to select one of more data fields prior to the report actually running. Most reports show a screen with one or more filters/prompts that may require answering. For example, clicking the "Count Items by Item Type – with Item Type filter" report shows the following filters/prompts.

Note: filters and prompts are interchangeable terms and mean the same thing. Sometimes you might see them called filters while other times you might see prompts.

This report shown on the next page has two filter prompts built into it. The first is for Item Type, the second, which is a required filter, is for Item Library Code. You must answer required prompts.

Pro-Tip: if you leave a non-required prompt empty, the system will assume you didn't want to filter by that particular thing. In the example below, if you don't select any item types, the report will return ALL item types for the selected item library(s).



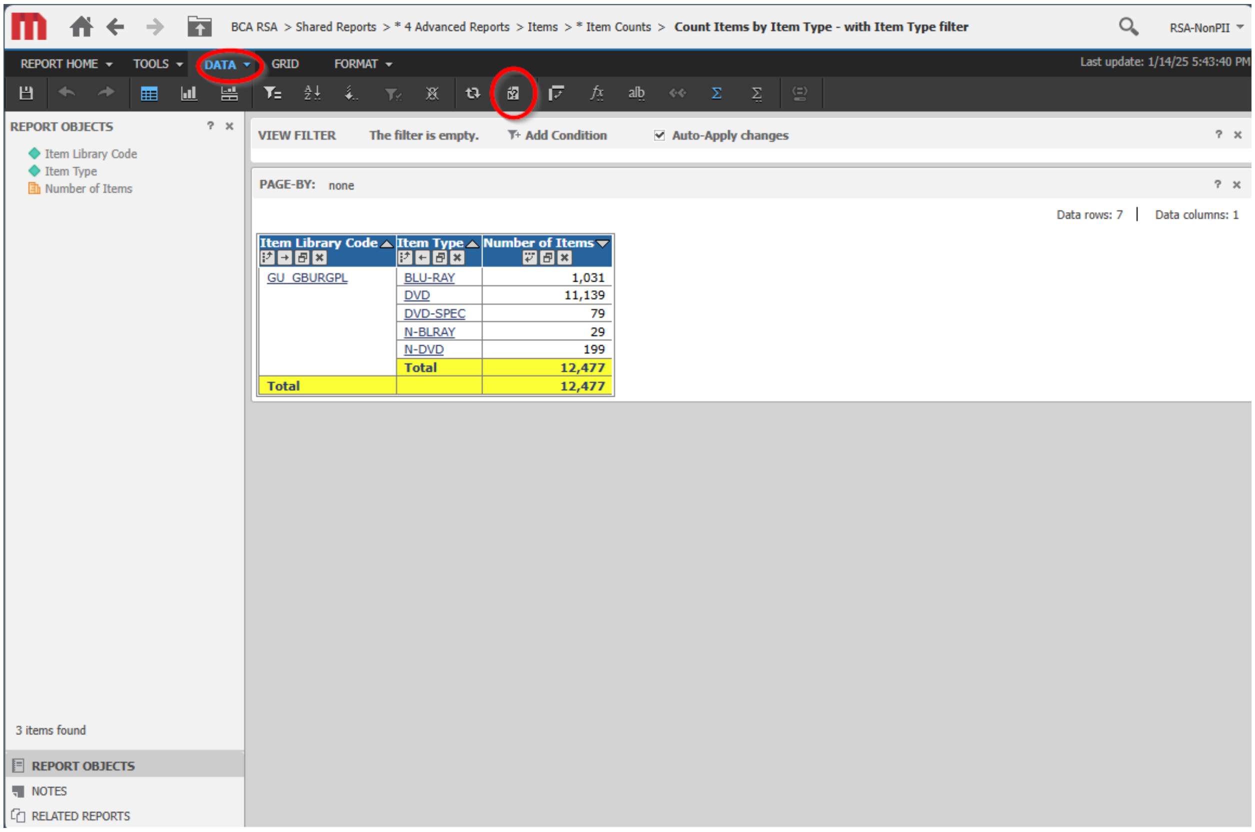
1. This is the list of things set as a filter on in report. In this case, it's an Item Type filter.
2. To select item types, you can add them one by one by double clicking an item type to move them to the Selected box on the right. Or you can highlight several item types and click the single (top) right arrow to move them over. The double right arrow moves ALL the values on the Available list (left) to the right. The single and double left arrows move the selected or all selections back out of the Selected box.
3. This is the second of two filter selection areas. The RED (Required) text next to the prompt name indicates you must make a selection in this prompt and the report will not run until you do.

   Other filter types you will see are date values (with pop-up calendars to help you fill them in), checkboxes, or blank boxes where you could enter a specific value like an item ID to filter on.

4. After answering the prompts, scroll to the bottom of the page and click the Run Report button. This step is frequently missed by users!

Pro Tip: Sometimes the button is hidden by a report has several filter prompts. You'll need to ensure you scroll all the way down to see it.

In the display below, we choose all the BLU-RAY and DVD item types and GU_GBURGPL as the item library and ran the report. Here is the output.



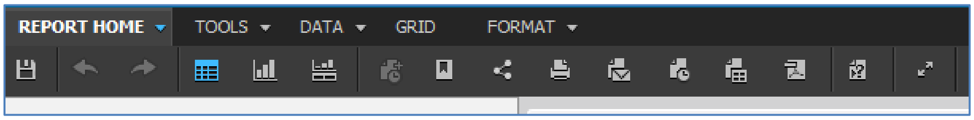
This shows the main work area in BCA. Across the top you have the familiar red M, Home, Go back/forward arrows, the Up One Folder icon and the name of the report in the navigation hint.

Below that are the report menus, then the menu icon bars (which change depending on which menu item you last clicked), then the report field with the report objects in the left pane and the actual report, view filter data, and page-by field on the right.

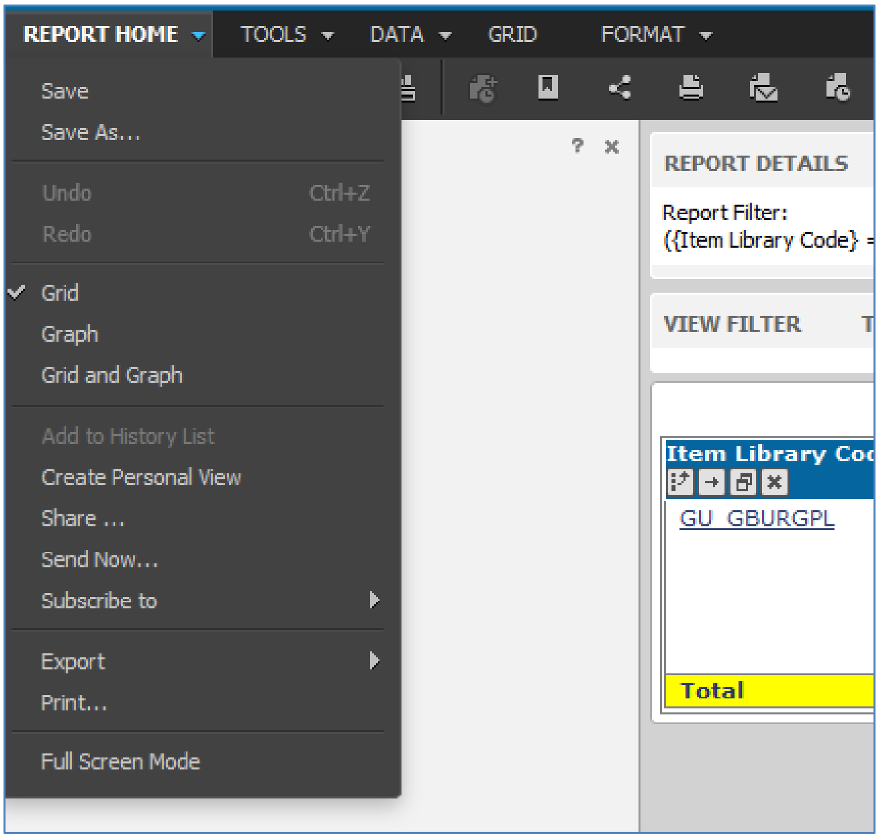
Forgot your filter selections? Want to change them? If you need to re-prompt the report or review the prompt/filter selection you made when you ran the report, click either the REPORT HOME or DATA menus, then click the "? Over a paper" icon () to return you to the filter settings page. From here you can change the filter options, then click Run Report to return to the report with any changes you made to the filters.

Each of the menus contain different functions and an associated icon toolbar icons for the most important or frequently used functions in that particular menu item. If you mouse over the menu icons they tell you what they are.

Report Home Menu:

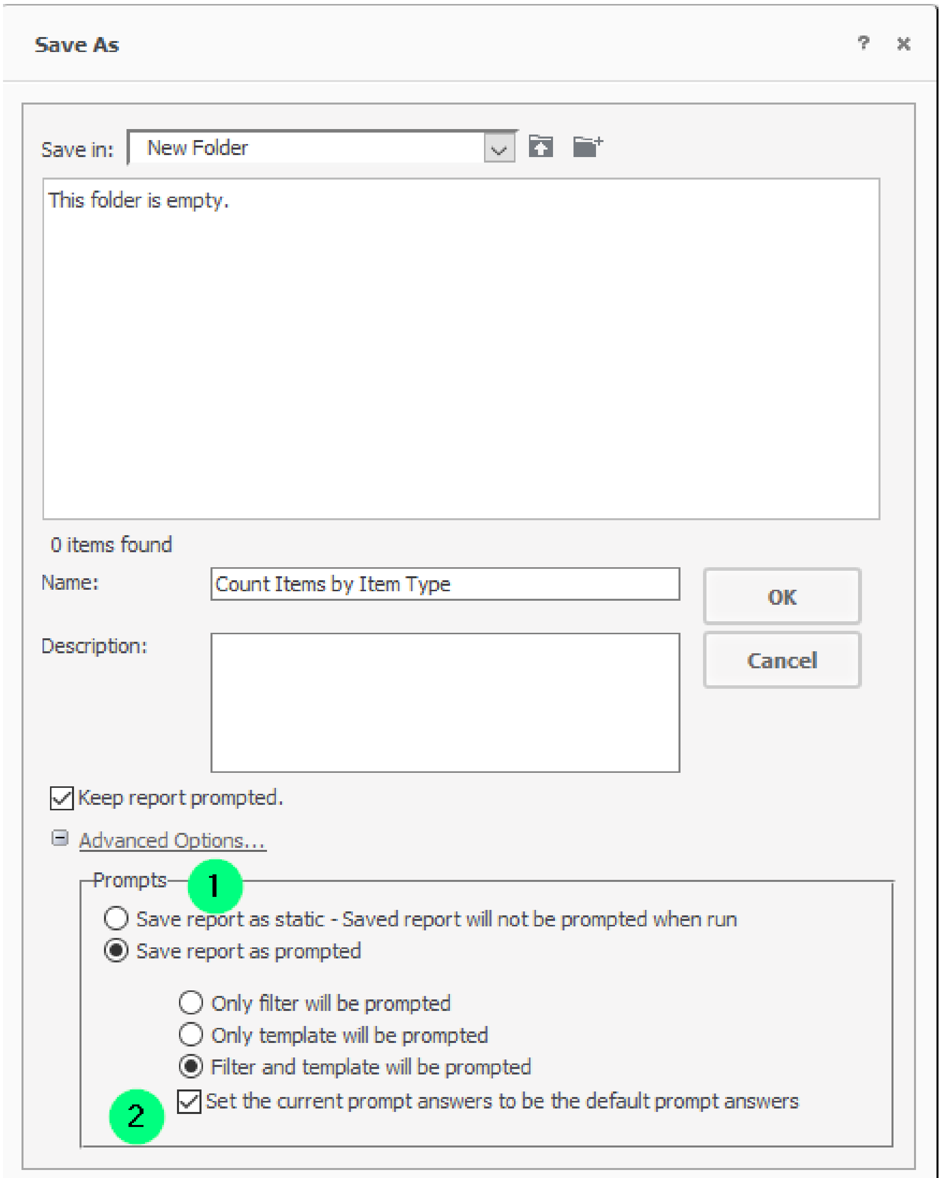


The icons shown for the REPORT HOME menu mostly match the drop-down options. The re-prompt icon on the far right side is the exception. Use the drop-down menu to make it easier to know what you are selecting.



Save: Saves the report AS PROMPTED to your My Reports folder. This saves a copy of the report with your prompt answers as the defaults.

Save As...: Allows you to save the report WITHOUT your prompt answers as the defaults. To do this, ensure #2 below (next page) is setup like the default shown in the picture (Filter and template will be prompted). If you were to click the radio button for #1, Save report as static, the report will make your current prompt answers the only thing the report will show. It will never ask for prompts again, just rerun exactly what you saved. This is generally not what you want to do.

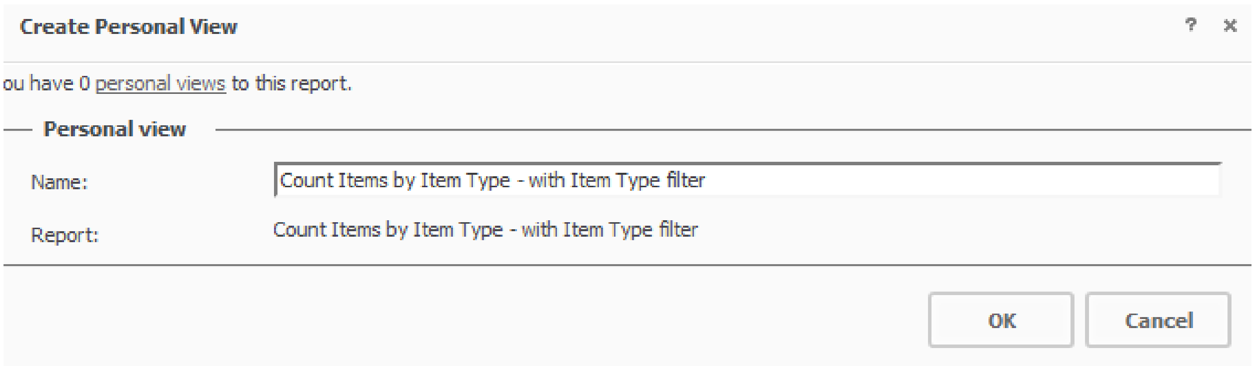


Undo and Redo: Undo or redo your last actions in the report. If you click something and change the look or data of the report you can click undo to remove your change.

Grid, Graph, Grid and Graph: Grid is the default output, as show in the finished report. It looks like an Excel report. Graph turns the data into one of several graphs which may or may not be helpful. Grid and Graph shows you data as both a grid and a graph. In general, our reports do not happy convert to grid or graph views without being reworked first.

Add to History List: This adds a temporary copy of the report to your history folder. In practice, it's not a historical anything just confusing. ***Do not use this feature.***

Create Personal View: This is what you use to save a pre-prompted report to have it run again in the future the way it's setup now. You'll be asked to name the report or just accept the default. To run the report in the future, go to the My Subscriptions folder and click the report. The report will run again WITHOUT asking you to answer the prompts again. If you have reports you run frequently without changing the prompt answers, this is your best option! There is a Cheat Sheet for creating Personal Views on the BCA page of the support site.



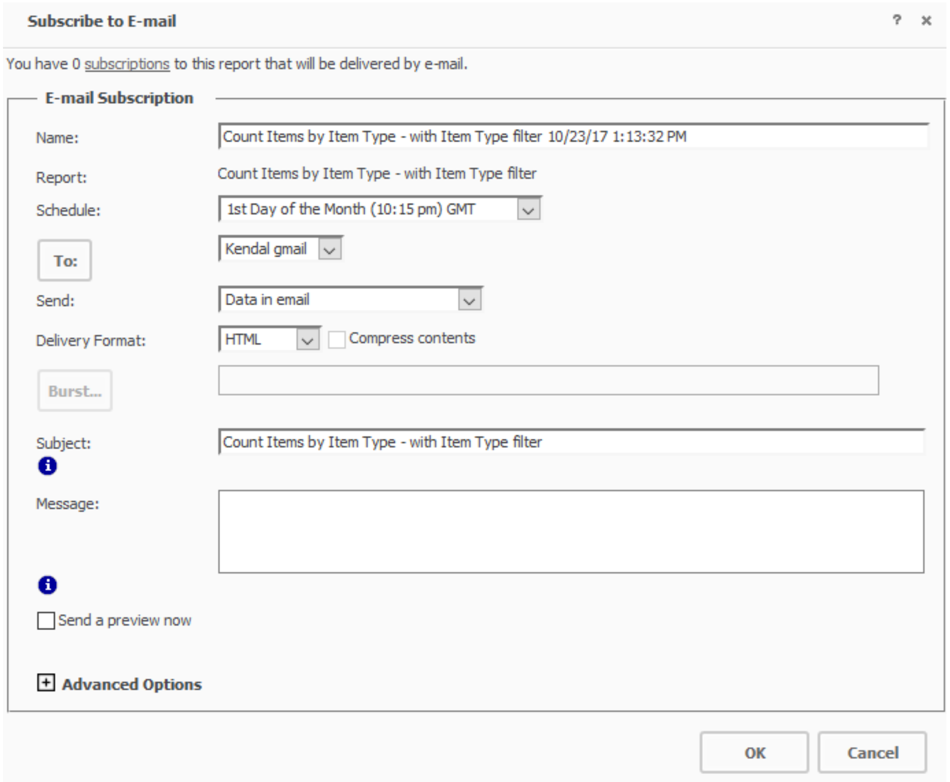
Share…: Sets the security settings for the report you are looking at which you can't change. *Ignore this option, not used.*

Send Now…: Sends the current report via email to one or more email addresses. You can send the report as data in the email body (HTML), or as an attached Excel file (formatted), a PDF, plan text file, or a CSV file. You can also put a short (150 characters or so) message with the data. This is a one-time sending of the report right now, not a scheduled report.

Subscribe to: Subscribe to this report, as prompted, to run on a set time period and send it to E-mail. There are also options to send to the History List, a File, or Printer but those don't work in our context. The ONLY option you should use here is E-mail.

After clicking Subscribe to, then selecting E-mail from the sub-menu, the first thing to do is selecting a Schedule: from a very long list of times. These times are shared by all SirsiDynix customers and can be confusing. Just scroll down the list until you see the date/time combination you want. Then click the To: button to add one or more emails from your account. The Delivery Format has the same options as the Send Now option above. Generally HTML works for smaller reports while Excel or PDF work well for long reports. Add a short message to the email to help you remember what it's used for. You can send a copy right now to the recipient by checking the "Send a preview now" option.

Note: there is a separate guide for setting up a scheduled report available on the RSA Support Site. It is older, but still accurate.



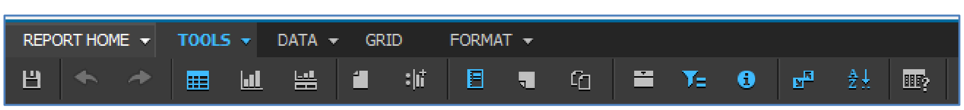
Export: This allows you to export the data as one of the following file types: PDF, Excel with plain text (*choose this is you want to sort the data in Excel*), CVS file format, Excel with formatting (which looks like the report on screen but makes sorting impossible in some reports), HTML or Plain text.

There is a cheat sheet available for Exploring Data with Excel on the BCA Support site page.

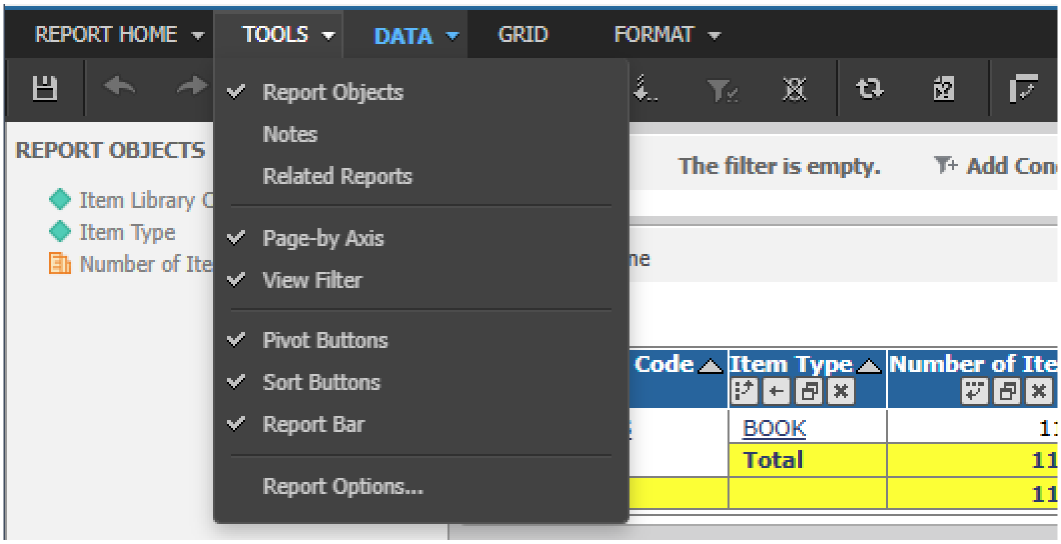
Print...: Allows you to send the report to your printer. The report is turned into a PDF then prints it out.

Full Screen: Gives you a bit more space by removing the top and report menu bars and the Report Objects panel on the left of the screen.

Tools Menu:



The tools menu allows you to show or hide many report modification or informational elements. In general, you will want to have the following checkmarks on your TOOLS menu.

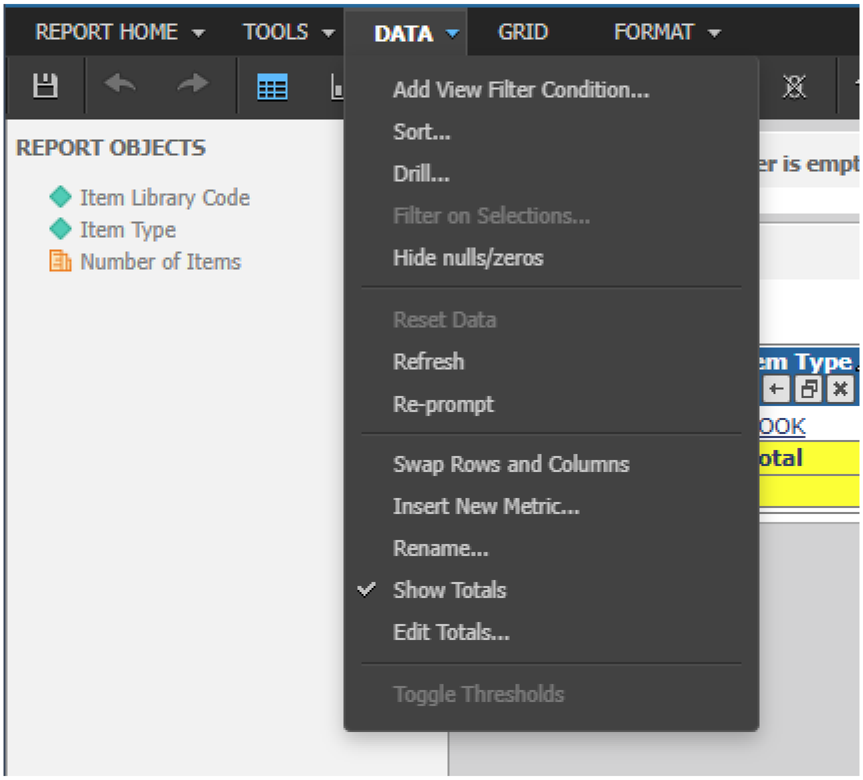


There checkmarks either show or hide various elements of the BCA interface on the finished report screen. You want to see all these options just in case. If any options checked in the image above ARE NOT checked in your BCA account, just click then to check them. These settings 'stick' with your user and should remain checked in the future.

Report Options: *Not used in our context. Do not change the delivered settings.*

Data Menu:

This menu contains various options to directly affect the output of the report, add totals and subtotals, Refresh/Re-Prompt the data, etc.



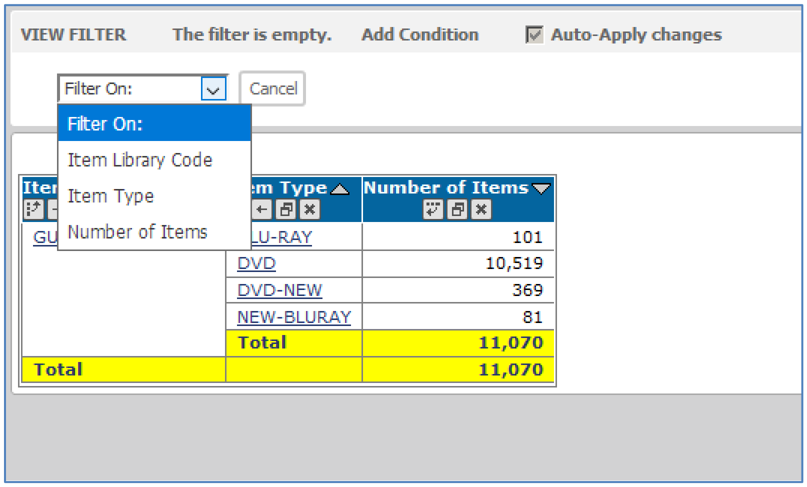
Add View Filter Condition: This allows you to search within an already run report to focus in on specific data. This is a very powerful function to further refine your data set.

Once you select this, it turns on the View Filter bar below the Report Details section (which should be one already, see above), and allows you to select any data element in the report to further filter on. For example, in the screenshot below, we choose the filter to show only Item Type DVD.

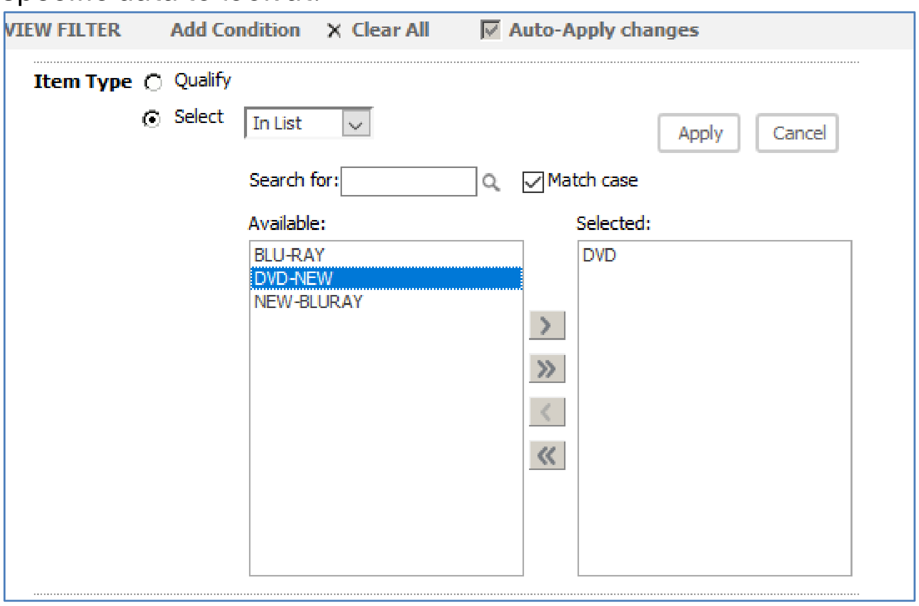
If you have a large shelf list and only want to see items by a particular author or in a specific location, this is a good way to quickly limit down to that information. HOWEVER, you need to remember that once you've set a view filter, it ALWAYS effects the display until it's removed.

Pro Tip: Some reports come with a view filter pre-applied. DO NOT remove or change these pre-existing view filters or you will get inaccurate data. An example is the number of checkouts to other libraries patrons. In this case, we have a view filter setup to remove all checkouts to patrons belonging to the checkout library.

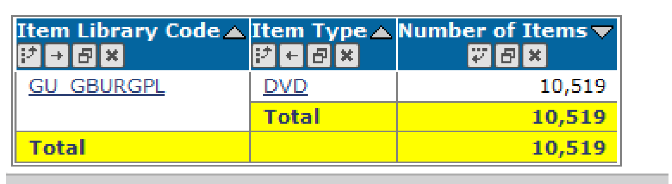
Choose what data element to sub-filter on:



Choose the specific data to look at:



Output of view filter with all other data removed.



Item Library Code	Item Type	Number of Items
GU_GBURGPL	DVD	10,519
	Total	10,519
Total		10,519

Sort...: Shows an advanced sorting window allowing you to select a multi-level sort of the columns. The grey up/down arrows in the report body header do the same thing for a single column.

Drill…: Would allow you to examine the data in that cell more closely. In practice it doesn't work as expected at this time because RSA can't associate specific reports as drills. If you try to use this it will frustrate you. *Not currently used in RSA's context.*

Hide Nulls/Zeros: Not currently applicable since nulls are hidden already. Might become useful in the future. *Not currently used in RSA's context.*

Reset Data: Returns the data to the starting point if you have modified it since running the report. Also removes any view filter applied to the report, which is bad for reports with pre-applied view filters.

Refresh: Refreshes the data against the database. Currently has no effect since we only update the database once each morning at 1:30am. *Not currently used in RSA's context.*

Re-prompt: Returns you to the report setup/prompt screen and allows you to refine your reporting choices. If you forgot a user profile or item type selection, this is the fastest way to add/remove them.

Swap Rows and Columns: Does exactly that, usually in unexpected ways. It's better to move individual rows/columns in the body of the report using the curved or Up arrow icons next the data element titles. Click the Swap Rows and Columns option again to revert.

Insert New Metric: Allows you to create metrics of data on the fly. Beyond the scope of training. If you need a new metric, let RSA staff know so we can make it for everybody. *Not currently used by library staff in RSA's context.*

Rename/Edit Objects: Don't like the column or row header text? Change it. If you want to keep that change, you need to save the report or create a Personal View.

Show Totals: In the example shown, the report totals are the yellow lines. The look and coloring vary depending on the grid theme. You can show or hide total and sub-total counts in this item.

Edit Totals: Allows you to change the total type (count, average, median, etc) and change the levels that show sub-totals. *Not currently used in RSA's context for library staff running reports.*

Grid Menu:

The grid menu doesn't have a drop-down list of options. Why? Nobody knows.

The first icons you've already seen and are better used from the Report Home menu are (left to right):
Save
Undo
Redo
Grid view
Graph view
Grid and Graph view

Grid Theme: This contains a list of various color schemes for the report. Some are better than others. Some don't group rows or columns by default which is helpful for exporting via email to Excel. Clicking the dropdown gives a display of your choices. If you want to export to Excel and do data sorting or manipulation, the last theme in the list, named "Table", is your best option to use. The view called "Monochrome" also works.

Banding: Clicking this icon changes the color to tell you it's active. It turns on row highlighting on every other row. Some like this feature, others do not.

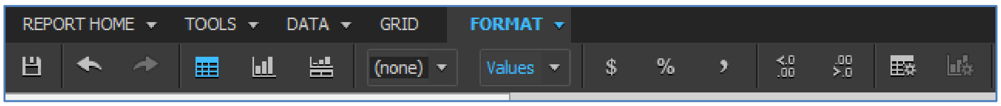
Outline: Makes your data look bad, most of the time anyway. Once in a great while it is visually appealing, but typically it's useless.

Merge Column Headers / Merge Row Headers: This is what turns on or off the 'whitespace' in a report. While merging headers makes the report easier to understand and better shows relationships, but breaks Excel's ability to do sorting if a report is sent via email or exported as formatted text. If you want to export a report to Excel to manipulate the data, make sure you unclick both column and row header merging. Or just select "table" as the Grid Theme which automatically disables both.

Lock Column Headers / Lock Row Headers: If the Lock Row Headers is on (blue icon), then the left column headers will not move, and the bottom scroll bar goes away, and you must use the mouse wheel to scroll through the report data. Lock Column Headers freezes the top row on screen allowing the rest to scroll down. This is essentially like using the Freeze Pane options in Excel.

Auto-fit to Contents / Auto Fit to Window: There are either or selection, only one is active. Autofit to window expands the columns to fit the width of the window. Auto fit to contents makes the columns just wide enough for the data in them.

Format menu:



The Format Menu also has very few options. It's like the designers got tied at the end of the menu system.

There are no new functions usable in this menu. You'll never need to visit it.