Running Basic List Reports in Analytics

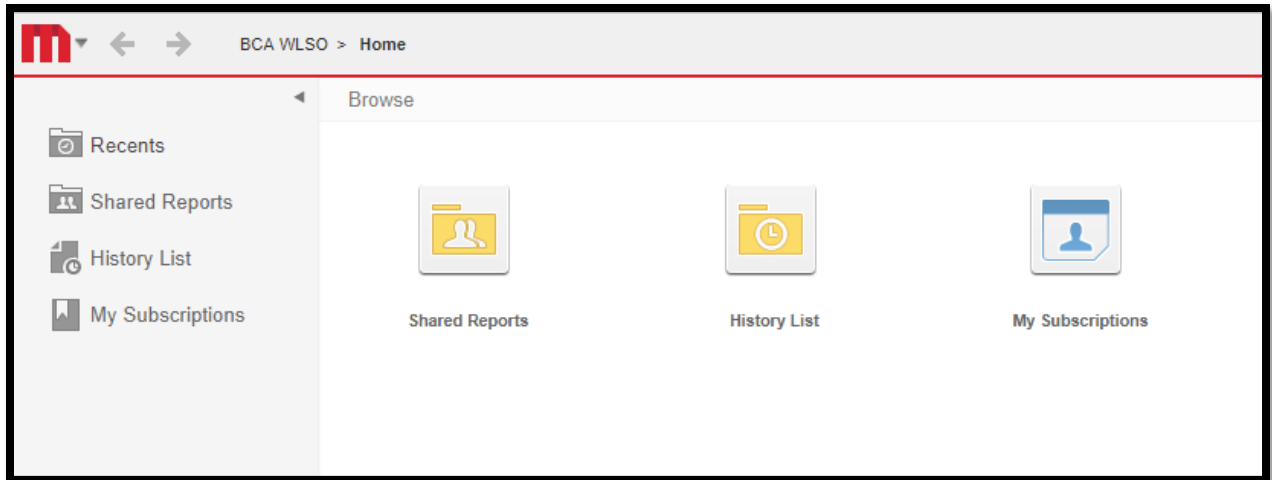Log in to Analytics (the new reporting software, hosted online at https://na1-microstrategy.bc.sirsidynix.net/bcanalytics/asp/Main.aspx). Use the user name and password we give you.
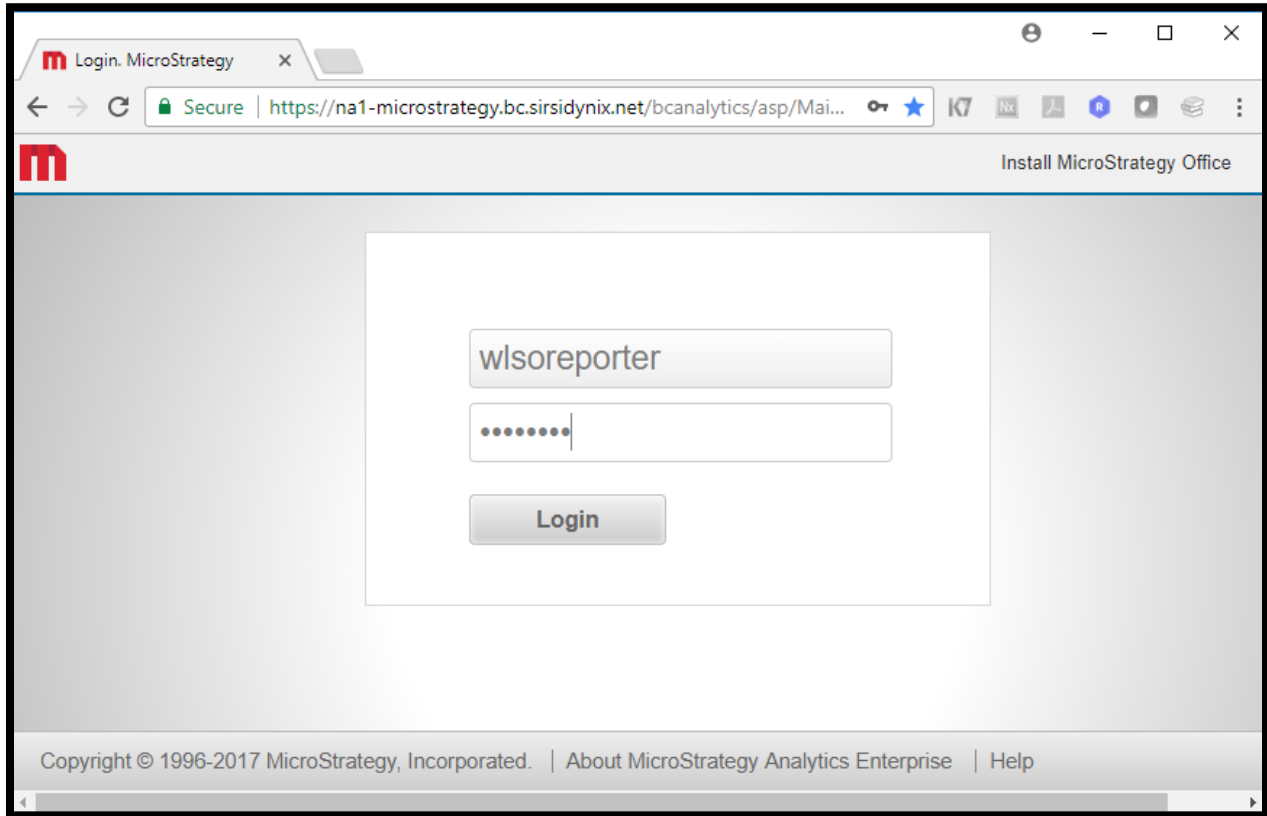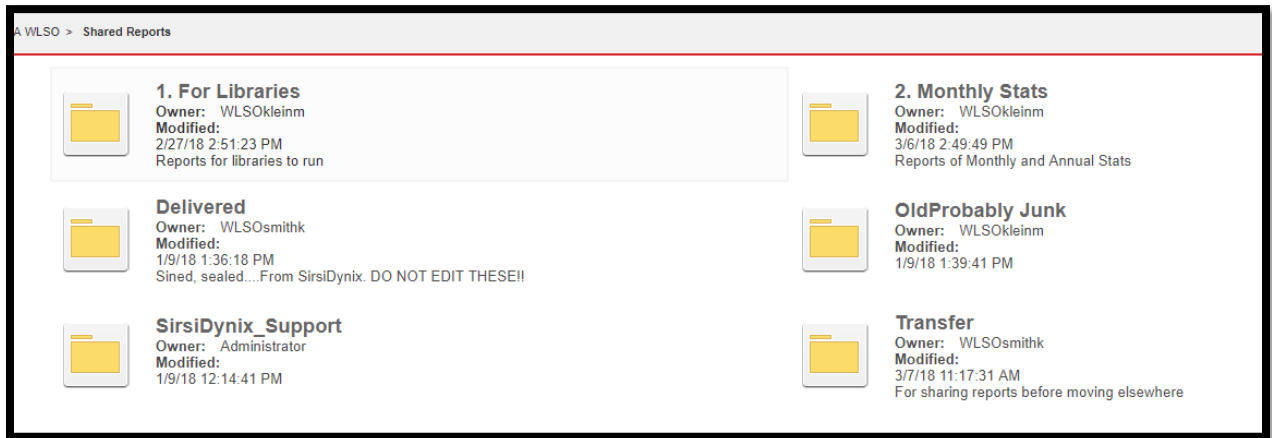

There will be an intermediary screen:
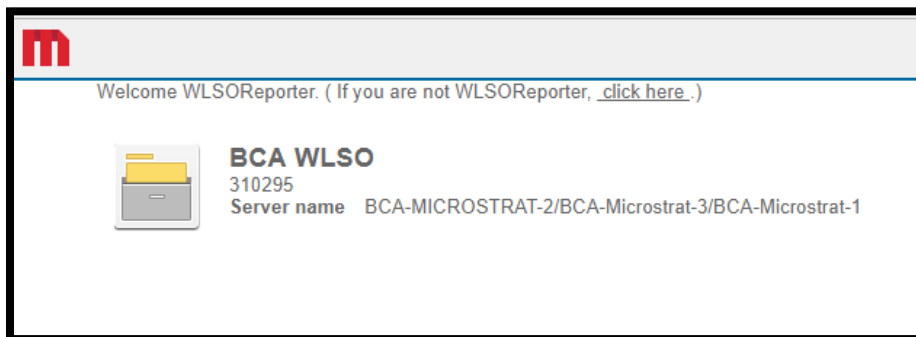
Click on BCA WLSO to be taken to the main page:

If this is the first time you're running this particular report, click on the "Shared Reports" folder.


All reports for libraries to run on their own are in the "For Libraries" folder on the top left, or in the "Monthly Stats" folder on the top right. In this case, reports for lists of items are found in the "For Libraries" folder.

Circ Hour by DoW
Owner: WLSOkleinm
Modified:
1/9/18 12:14:04 PM

Claims Returned PgBy Item Library
Owner: WLSOkleinm
Modified:
1/9/18 12:14:03 PM

Daily Circ - SelfChecks
Owner: WLSOkleinm
Modified:
1/15/18 9:30:23 AM

Daily Circ--Per Library
Owner: WLSOkleinm
Modified:
1/16/18 10:30:28 AM

ICat 2 - Blank
Owner: WLSOkleinm
Modified:
1/9/18 12:14:03 PM

ICat1 - Pecent of Circ
Owner: WLSOkleinm
Modified:
1/9/18 12:14:03 PM

List Claims Returned - by Checkout Lib
Owner: WLSOkleinm
Modified:
1/9/18 12:14:03 PM

List Claims Returned - by Item Lib
Owner: WLSOkleinm
Modified:
1/9/18 12:14:03 PM

List Items - Basic
Owner: WLSOkleinm
Modified:
1/9/18 12:14:03 PM

List Items >5 Holds with Ratio
Owner: WLSOkleinm
Modified:
1/9/18 12:14:03 PM

These reports serve the same purpose as templates in Workflows; filling in specific values will return results with pre-determined information.

For example, click on "List Items – Basic". You will be taken to the screen to fill in the required values:
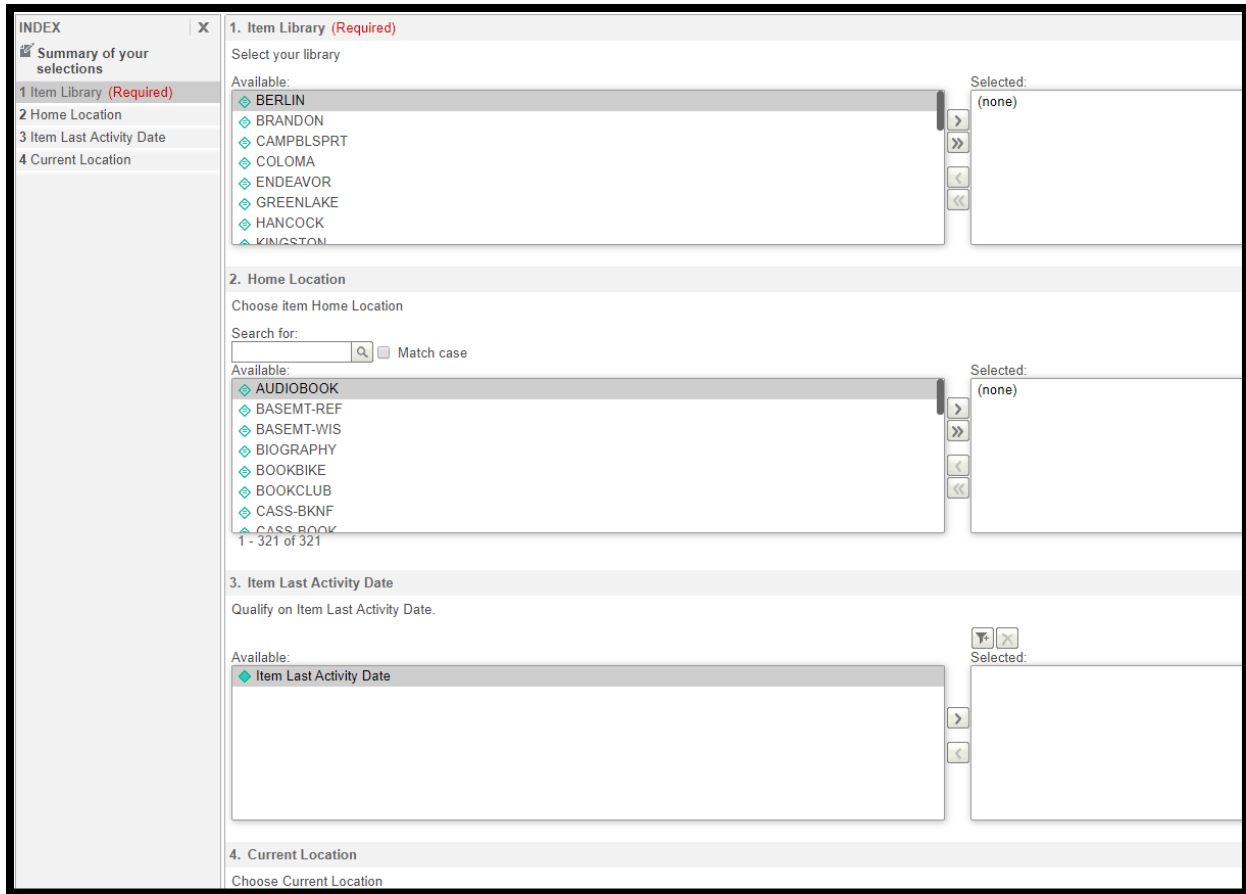
Item Library is required. For Home Location, you can use the search box above the field to quickly locate the ones you're interested in.
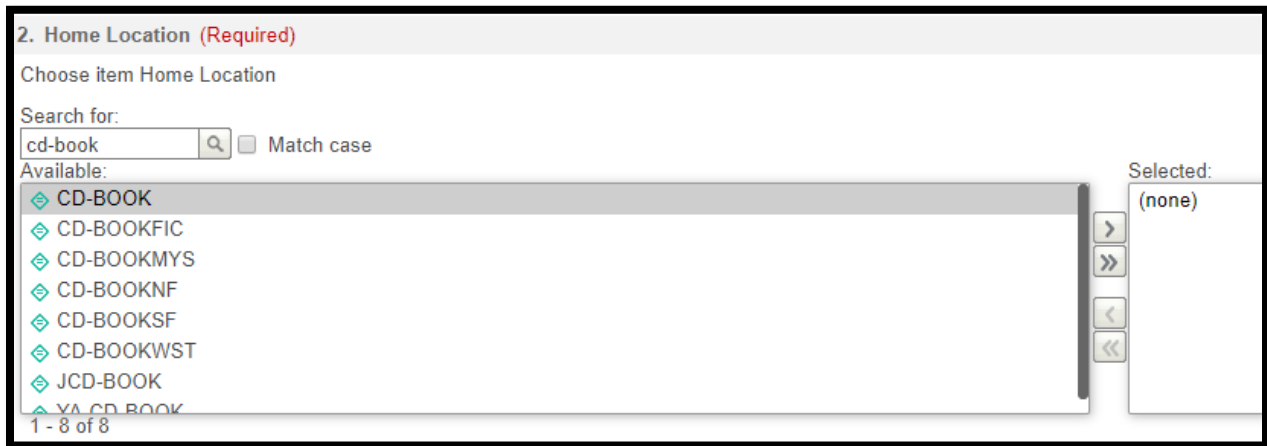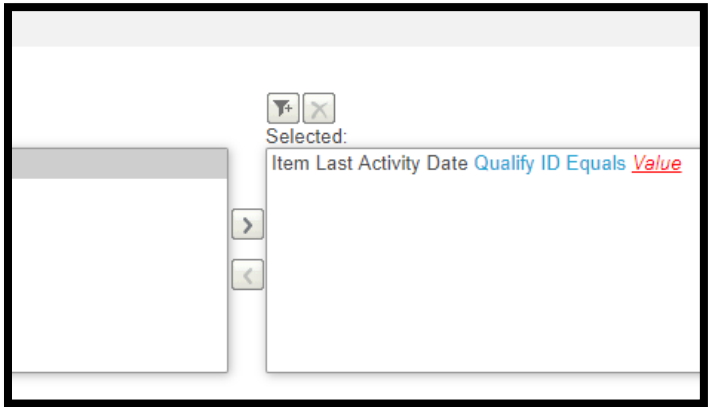

Double-click on a value to add it to your selection, or highlight it in the left-hand list and use the over arrow (>) to do so.
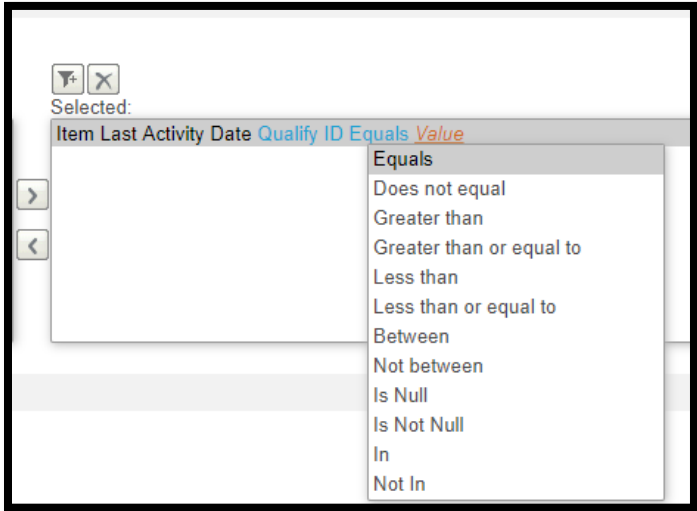
Optionally, you can choose to set a last activity date:

First, move "Item Last Activity Date" to "Selected:" by double clicking on it or using the over arrow (>):


While you can click on any of the individual terms, you only need to change "Equals" and "Value". Click on "Equals":


Most of the time, you will choose "Greater than or equal to", "Less than or equal to", or "Between". Choosing one changes the "Equals" term to the term chosen:
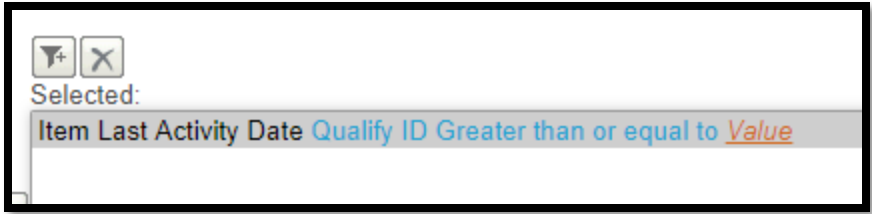
Click on "Value" to enter a date in the field, or use the calendar dropdown to browse for a date (make sure to click on a specific date to have it entered into the field.)
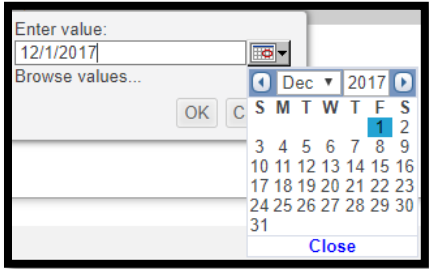
If you choose "Between" to select a range of dates, you will be prompted to enter two values:
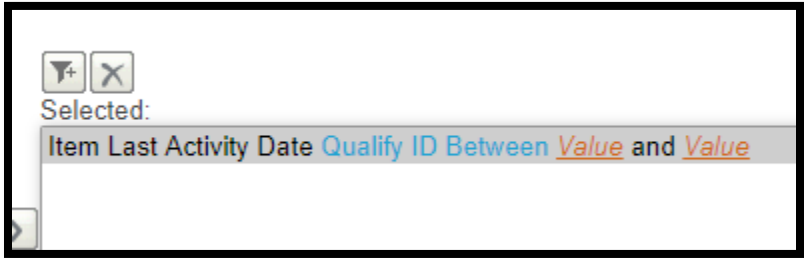
By default, the beginning and end dates entered are included in the report's results (so, setting a report to "Between 1/1/2018 and 1/20/2018" will include data for the 1st and 20th.)

When you have made all your selections, the report is run by the "Run Report" button in the bottom-left corner of the page. (It's tiny and easy to overlook).

The report may display a "waiting" page, if there are many results, or may show the results without needing to pause on the waiting page.

The results page:

From this page, you can examine the data, export the results to Excel, save this report to re-run later with these same options, or schedule it to be emailed to you regularly.

Working with the data: click on any of the arrows next to the header name to sort by that column; the default sort is sorting ascending (A-Z; oldest to newest, smallest to largest). Click again to sort descending.

If you wish to sort by multiple columns, click on the "Data" tab, and choose either the sort A-Z icon on the bar below, or by clicking on the arrow next to "Data" and selecting "Sort" from the dropdown menu. This brings up the advanced sort box:
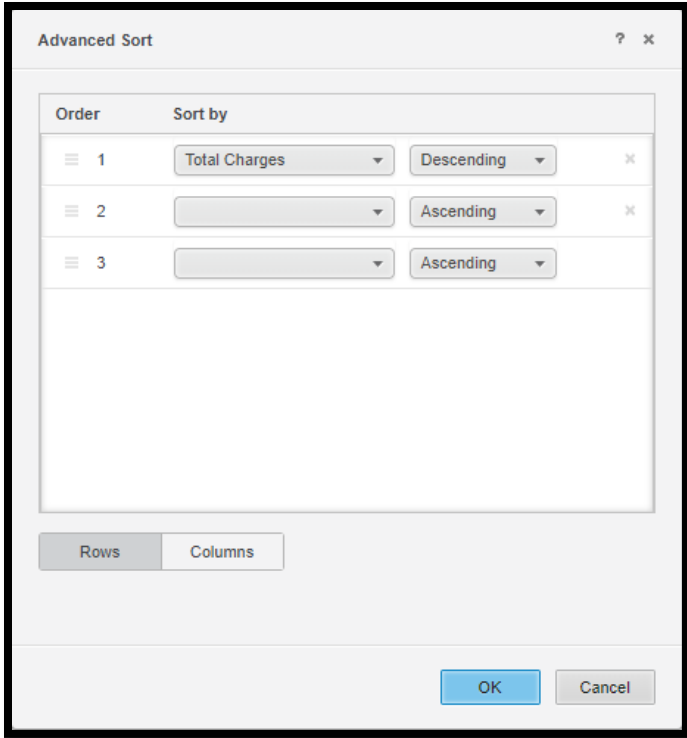
To change the appearance of the data, click on the "Grid" tab of the menu (unlike other options, this one does not have a drop-down menu).
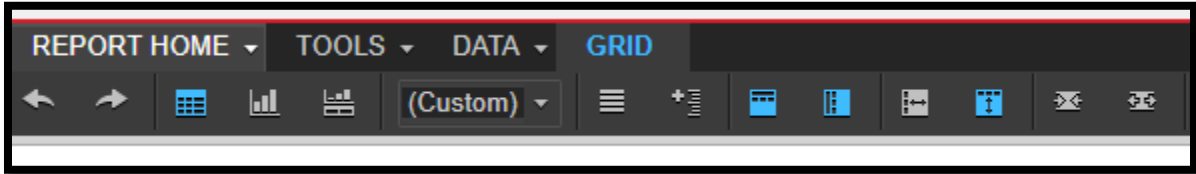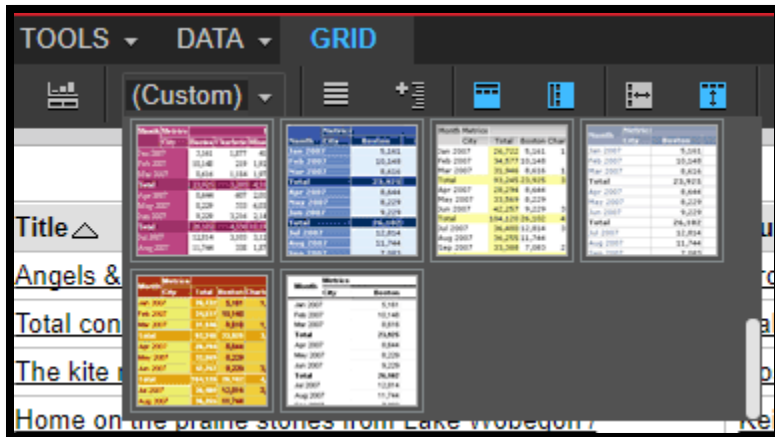

You can add banding to the rows, to make them easier to distinguish from each other, by clicking on the four-bar icon:
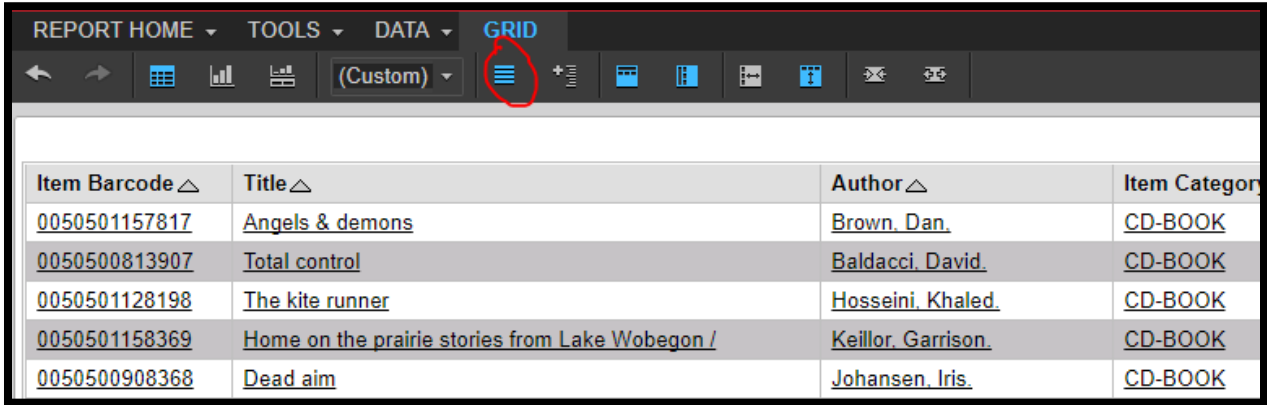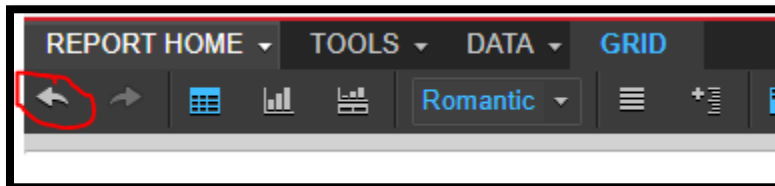

Click again to turn off banding.

You can change the color scheme of the grid by click on the (Custom) dropdown:

Change it back to the normal color scheme by using the "Undo" button at the beginning of the Grid bar:

To make more in-depth changes to the results, export the report to Excel.

From the Report Home tab, choose the "Export" icon (or, from the dropdown menu, the Export option).
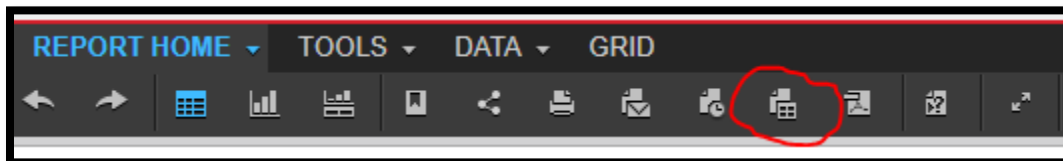
This opens a new browser tab with Export Options:

In general, the default options are acceptable. You may choose to click "Export Report Title" and/or "Export Filter Details", which will print the name of the report and the options you used to create it in the first few rows of the Excel sheet, before the data; they are unchecked by default.

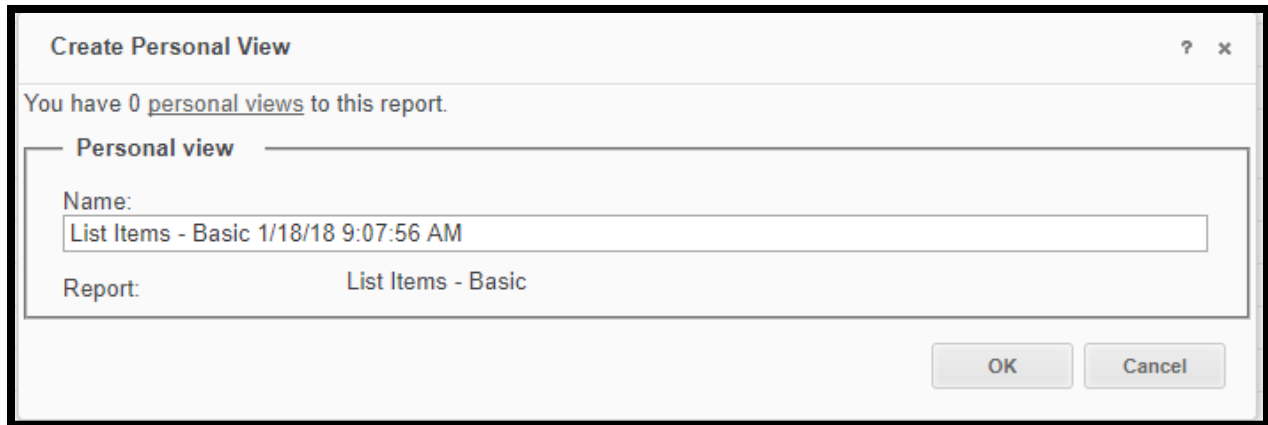Click the "Export" button when satisfied.
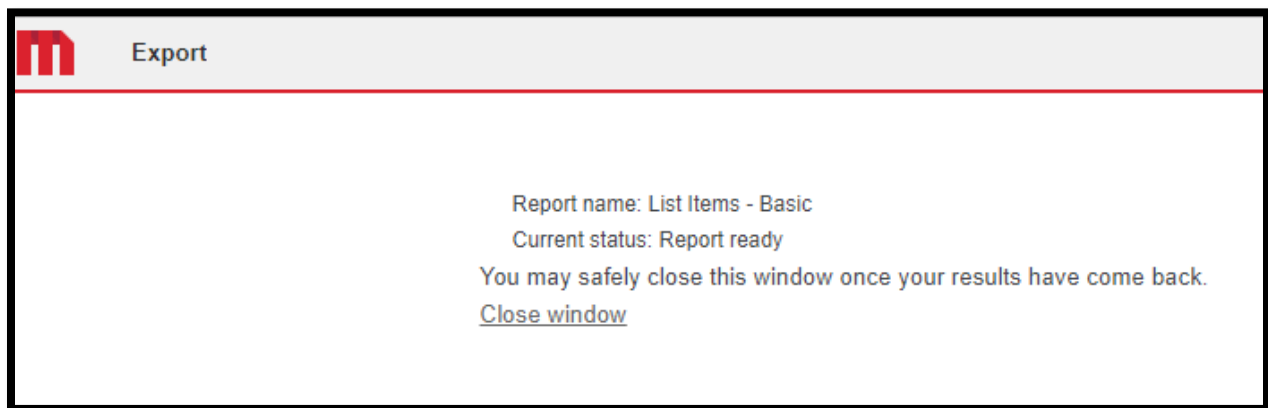
The file will automatically download, most likely to your Downloads folder, under the base name of the report. You can then open it in Excel, and close the extra tab in your browser.

If you would like to re-run this report with the same options in the future (and so not need to select answers for the prompts), you can create a Personal View.

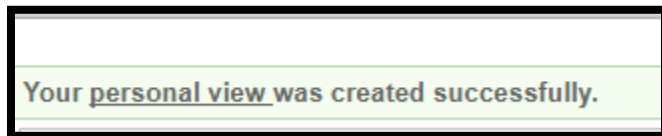From the Report Home tab, click on the "Personal View" icon:
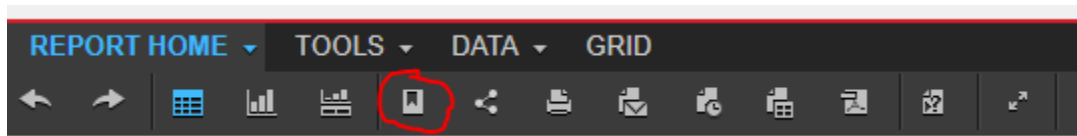
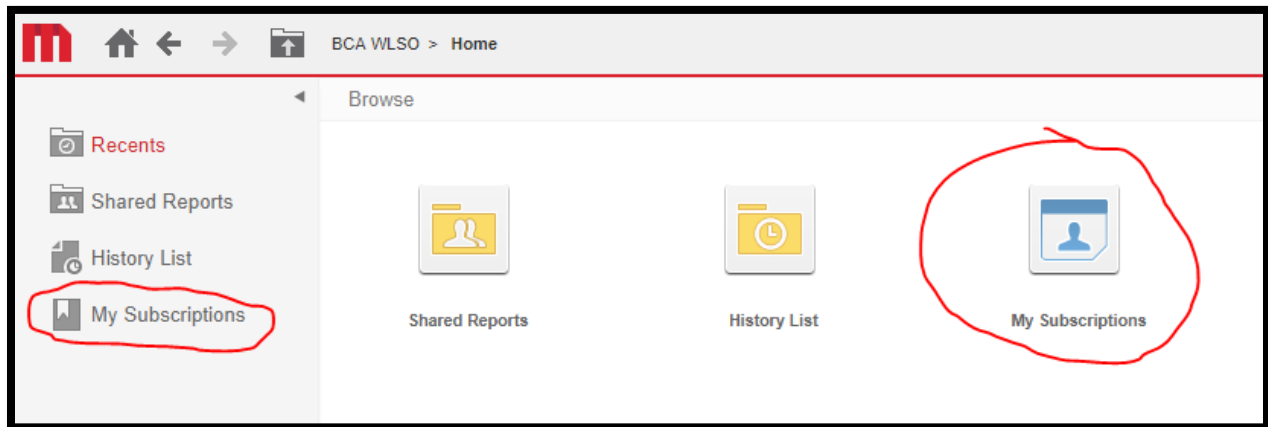You will be prompted to give the report a name:

Name it something descriptive, and click OK. Confirmation of the personal view being created will appear at the top of the results.

The next time you log in, you can find the report under "My Subscriptions":
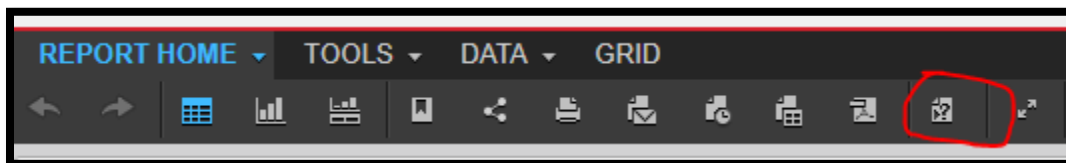

From the list, click on the report you want to re-run:

This will automatically run the report again, with the options you initially set up.

If you need to change the options you have set, you can reset your options and choose again by clicking the "Reprompt" icon the "Report Home" menu (it's also found on the Data menu).

This takes you back to the prompt screens, with your former choices filled in by default:


You can remove them by double-clicking, or by highlighting them in the right box and using the back arrow (<) to move them back to the left box.

Instead of creating a personal view, you can schedule a report to automatically be emailed to you. This is good for reports you want monthly, that will not have changes in date ranges, such as lists of items set

to MISSING, or items without Item Categories. This is done through "Subscribe To:" on the Report Home dropdown:
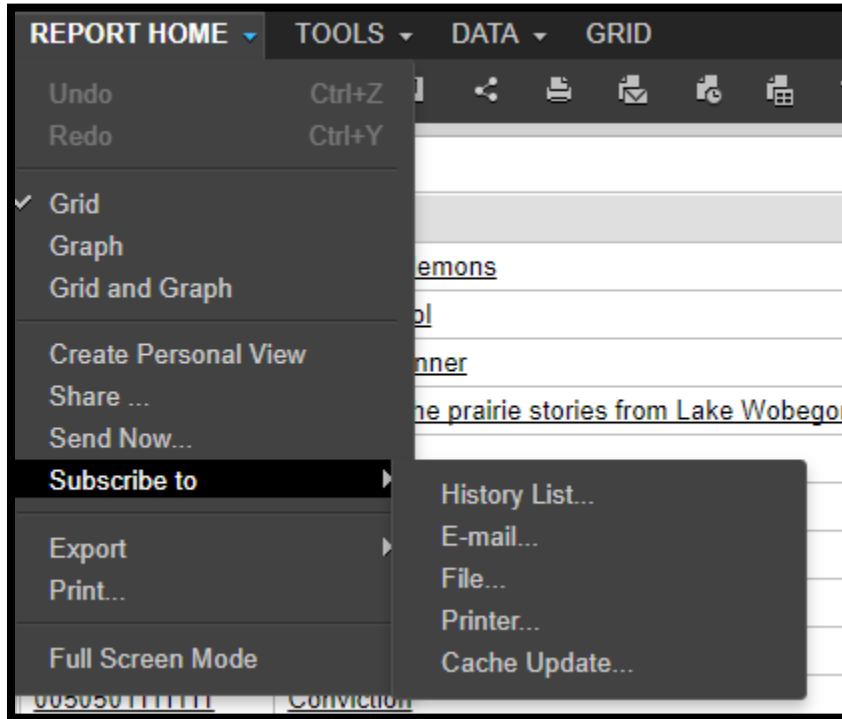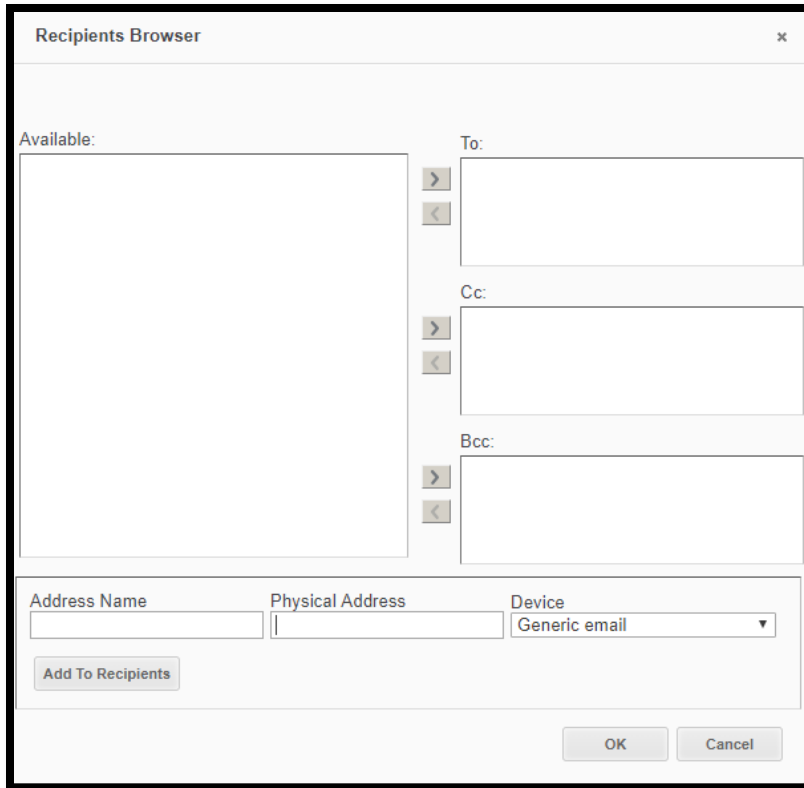

Click on "E-mail" to have the E-mail Subscription options open:

In the "Name:" field, I recommend taking off the date and time information to simplify the name.

Use the Schedule dropdown to select the date and time to have the report sent. ***There are very limited options for when reports can be scheduled***. (Reports can be scheduled to send on the 1st or 2nd of the month, but not the 5th, for example).

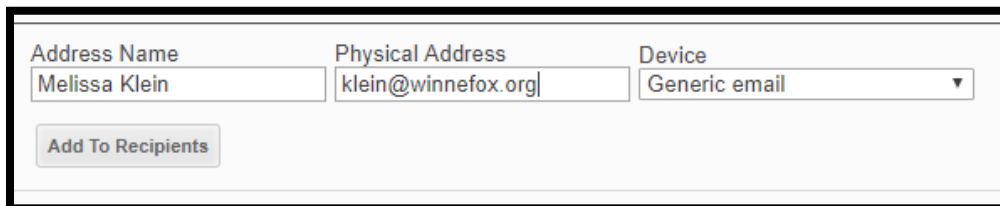Click on the "To:" button to set up an email to send the report to:

If this is the first time using an email, you will have to fill in the address fields before you can send the report.

"Address Name" is the name of the person.

"Physical address" is the email address:

Click "Add to Recipients" and, with the name in the To: field, click OK.

If you have previously sent a report to an email, that name will appear in a dropdown next to the To: box:

If sending to one person, you can use the dropdown to change to which person, or click the To: button to add a new email, or to email to multiple people.

For the "Send:" field, we recommend leaving it at "Data in email". This allows the report to be sent directly to your email, without needing to log into Analytics and access it from the History List.

For "Delivery Format:" choose Excel. You will then be prompted for a File name:

If you want, you can add a Subject and Message that indicates what this report is and what it is for. You can also check "Send a Preview Now" to have the report sent immediately to you, to check that all options have been set correctly.

To finish creating the subscription, click "OK". The report, with its current data, will be emailed to you on the date and time set; it will be sent from "Distribution Services" (saas-smtp@bc.sirsidynix.net).

To manage your subscriptions, from the Home page, click on "My Subscriptions".

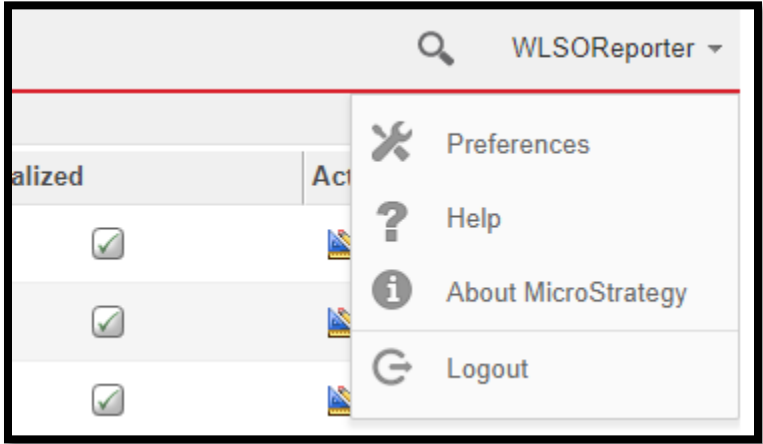Personal view subscriptions and Email Subscriptions display separately:

To remove an email subscription, check the boxes to the right of the item details, and click "Unsubscribe" at the top of the category.

When you are finished in Analytics, you can log out by clicking on your name in the upper right corner, and choosing "Logout":

(Tip! If you have logged out, and realize that you still need to see the report you were last looking at, you can log back in, and click on "Recents" on the left-side bar of the home page:

🕐 Recents	⟳ Recover List Items - Basic
👥 Shared Reports	▮ll List Items >5 Holds with Ratio
🗒️ History List	▦ ICat 2 - Blank
🔖 My Subscriptions	▦ Daily Circ--Per Library
	▦ Blank Report
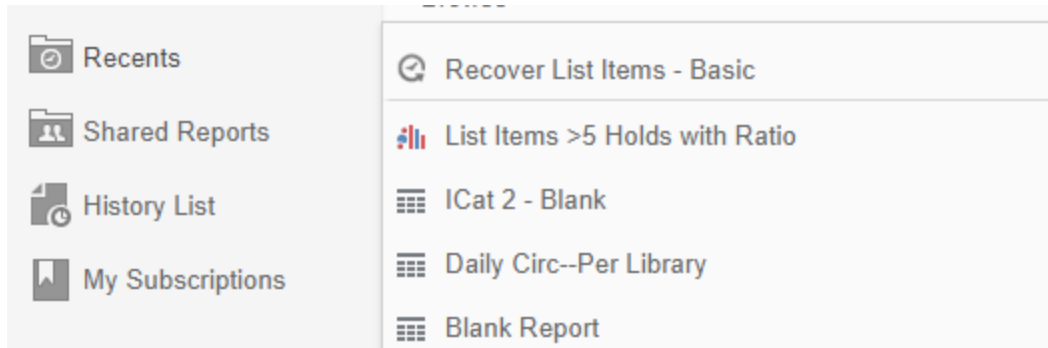
This offers a list of recently accessed reports, including ones not saved with a Personal View.)