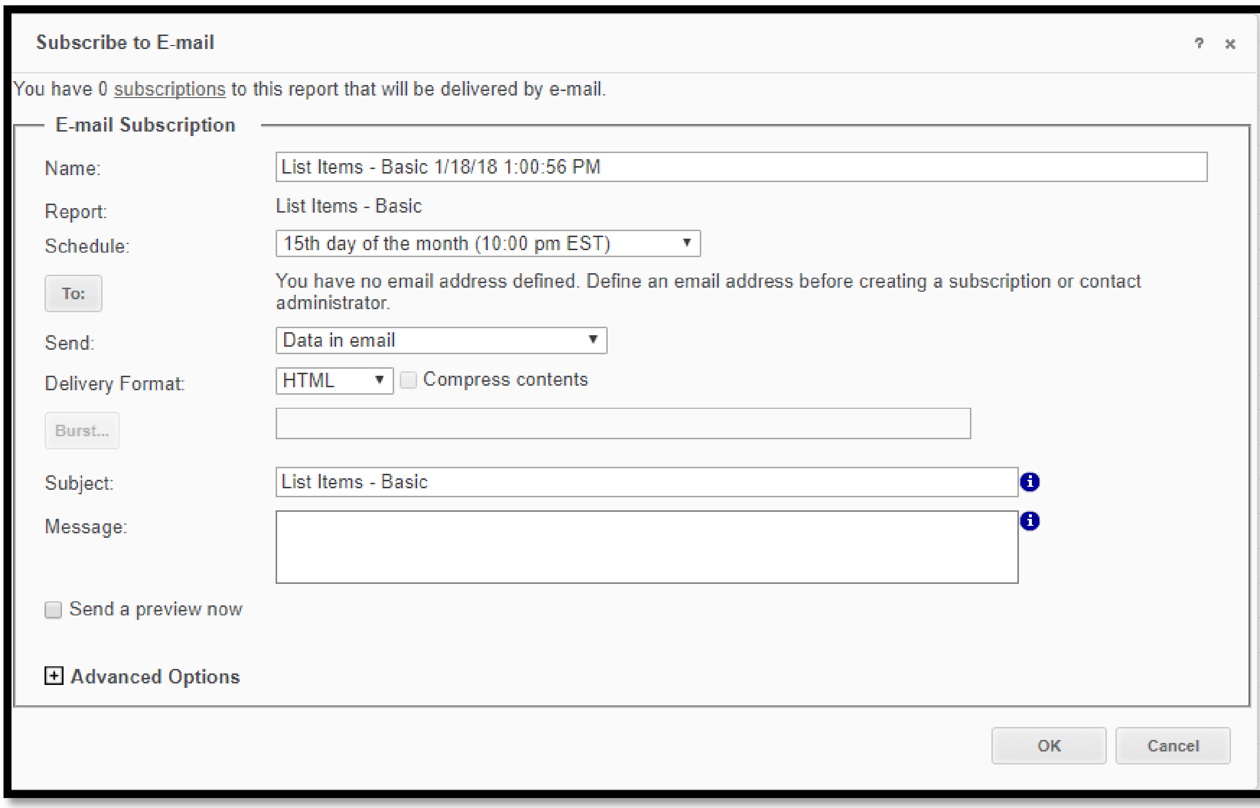
BC Analytics Subscriptions

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:

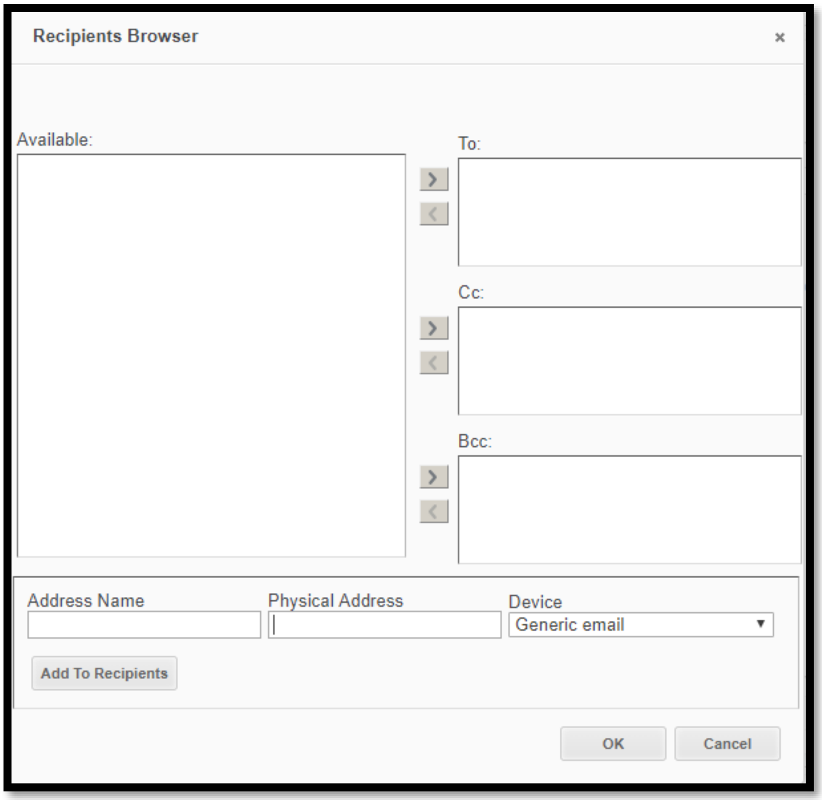
Click on “E-mail” to have the E-mail Subscription options open:

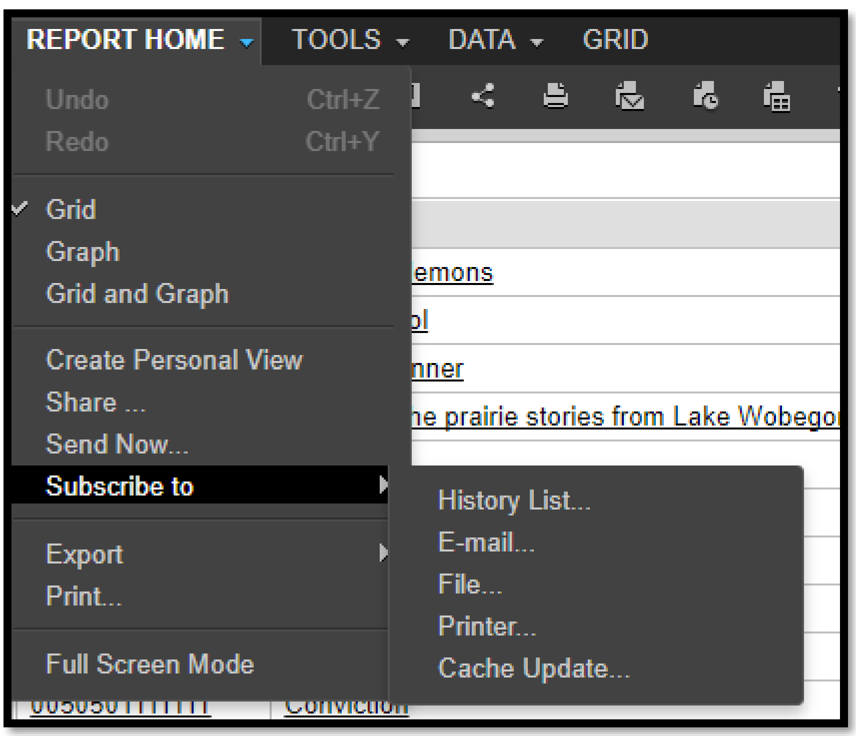


In the “Name:” field, I recommend taking off the date and time information to simplify the name.

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:





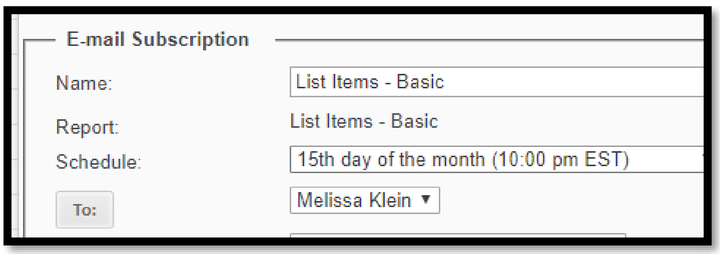
If this is the first time using an email, you will have to fill in the address fields before you can send the report.

“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.

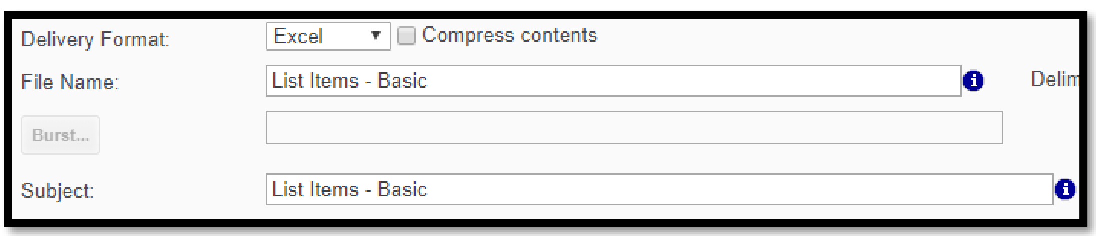
If you have previously sent a report to an email, that name will appear in a dropdown next to the To: box:



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:

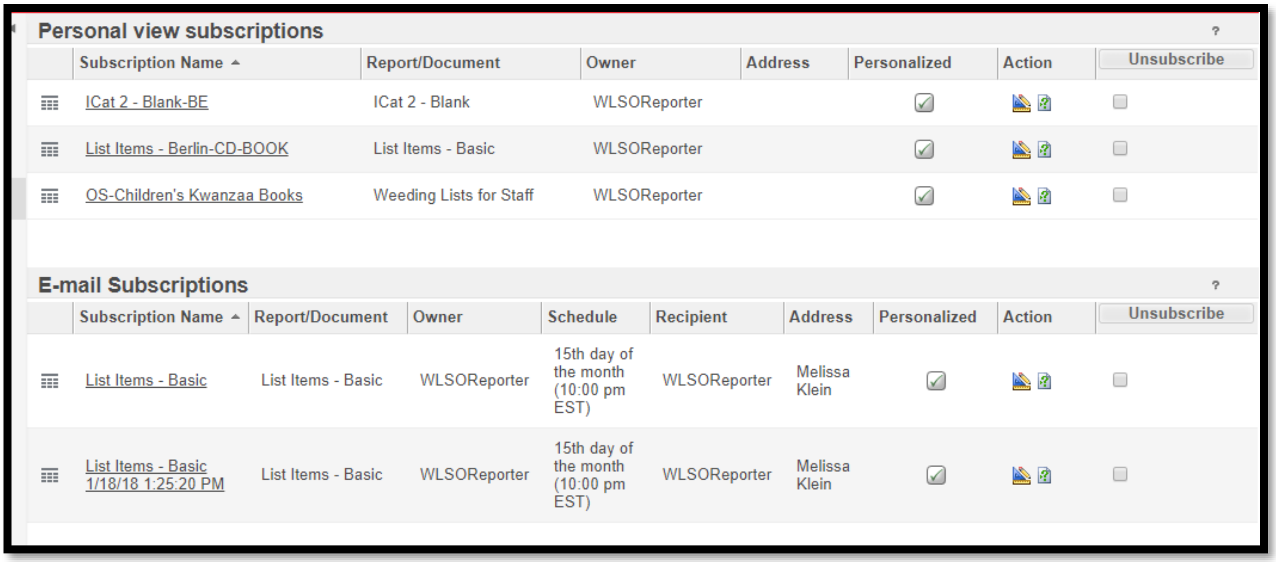


If you want, you can add a Subject and Message that indicates what this report is and what it is for. You can also check “Send a Preview Now” to have the report sent immediately to you, to check that all options have been set correctly.

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:



Personal view subscriptions

Subscription Name	Report/Document	Owner	Address	Personalized	Action	Unsubscribe
ICat 2 - Blank-BE	ICat 2 - Blank	WLSOReporter				
List Items - Berlin-CD-BOOK	List Items - Basic	WLSOReporter				
OS-Children's Kwanzaa Books	Weeding Lists for Staff	WLSOReporter				

E-mail Subscriptions

Subscription Name	Report/Document	Owner	Schedule	Recipient	Address	Personalized	Action	Unsubscribe
List Items - Basic	List Items - Basic	WLSOReporter	15th day of the month (10:00 pm EST)	WLSOReporter	Melissa Klein			
List Items - Basic 1/18/18 1:25:20 PM	List Items - Basic	WLSOReporter	15th day of the month (10:00 pm EST)	WLSOReporter	Melissa Klein			

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