

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:

The screenshot shows a dialog box titled "Subscribe to E-mail" with a close button (x) and a help button (?). Below the title bar, it states "You have 0 subscriptions to this report that will be delivered by e-mail." The main content area is titled "E-mail Subscription" and contains the following fields and options:

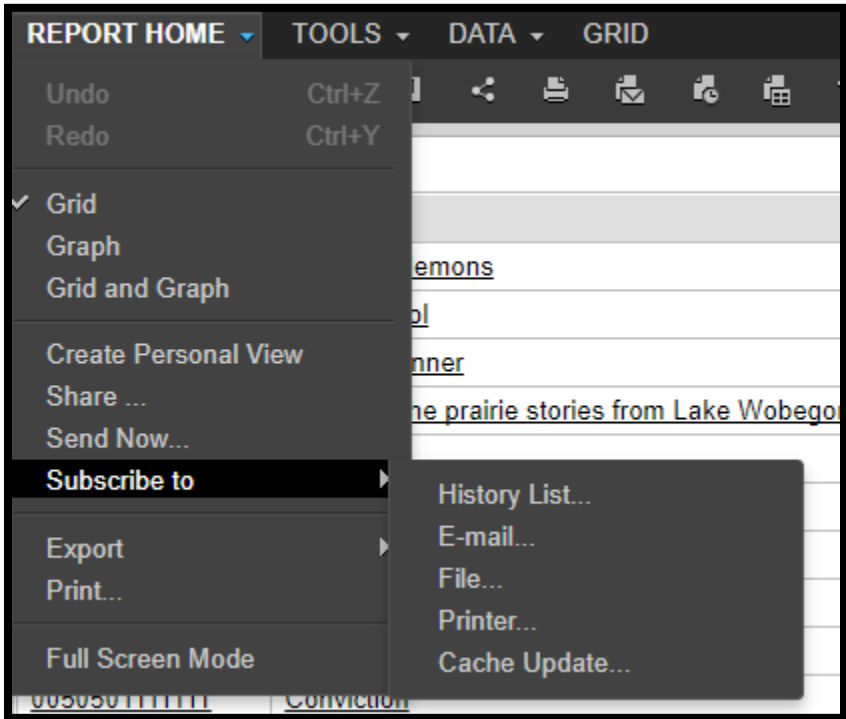
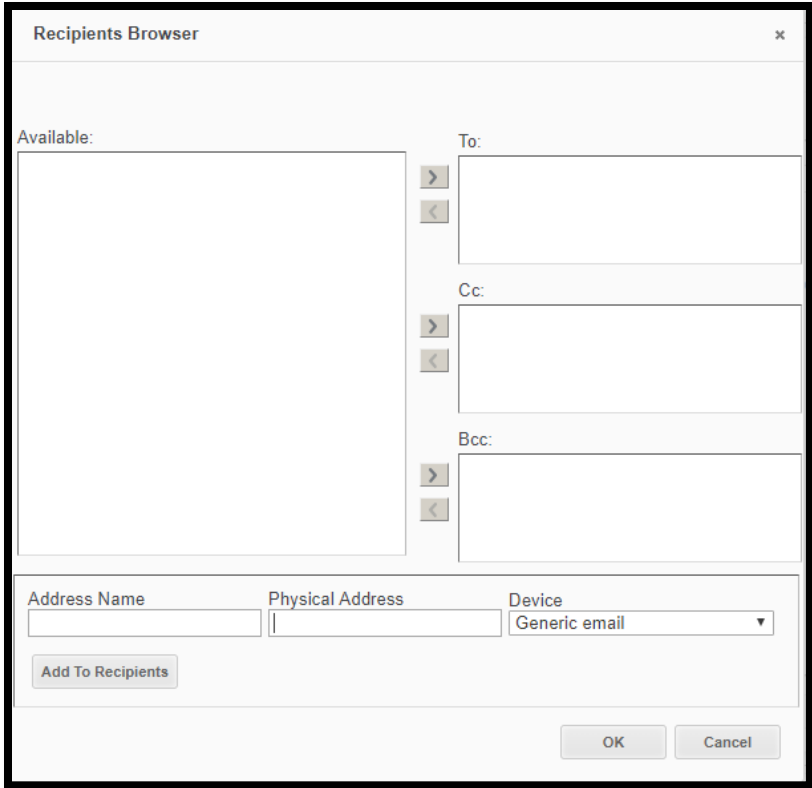
- Name:** List Items - Basic 1/18/18 1:00:56 PM
- Report:** List Items - Basic
- Schedule:** 15th day of the month (10:00 pm EST) (dropdown menu)
- To:** You have no email address defined. Define an email address before creating a subscription or contact administrator. (button)
- Send:** Data in email (dropdown menu)
- Delivery Format:** HTML (dropdown menu) Compress contents
- Burst...:** (button)
- Subject:** List Items - Basic (text field with info icon)
- Message:** (text area with info icon)
- Send a preview now
- Advanced Options

At the bottom right, there are "OK" and "Cancel" buttons.

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.

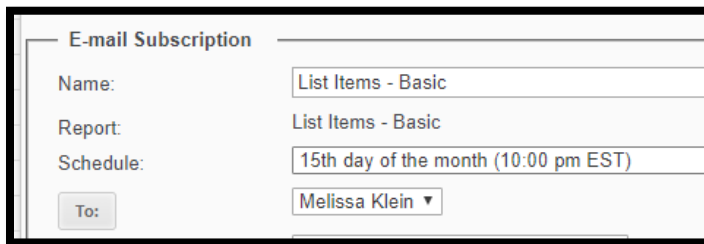
“Physical address” is the email address:



A screenshot of a form for adding recipients. It has three input fields: "Address Name" with the value "Melissa Klein", "Physical Address" with the value "klein@winnefox.org", and "Device" with a dropdown menu showing "Generic email". Below these fields is a button labeled "Add To Recipients".

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:

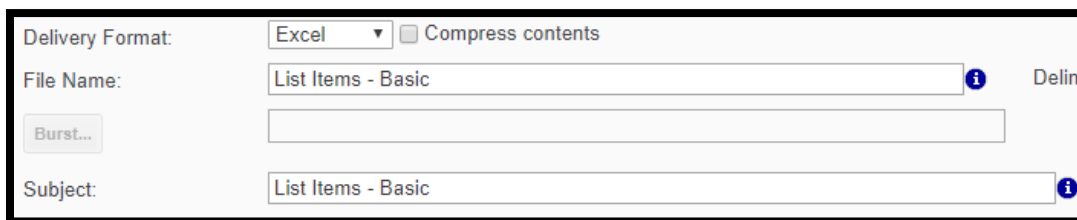


A screenshot of the "E-mail Subscription" form. It contains several fields: "Name:" with "List Items - Basic", "Report:" with "List Items - Basic", "Schedule:" with "15th day of the month (10:00 pm EST)", and "To:" with a dropdown menu showing "Melissa Klein".

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:


















A screenshot of the "Delivery Format:" section of the form. It shows a dropdown menu set to "Excel" and a checkbox for "Compress contents". Below this is a "File Name:" field with the value "List Items - Basic" and an information icon. There is also a "Burst..." button and a "Subject:" field with the value "List Items - Basic" and an information icon.

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-sntp@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	WLSORporter		<input checked="" type="checkbox"/>	 	<input type="checkbox"/>		
 List Items - Berlin-CD-BOOK	List Items - Basic	WLSORporter		<input checked="" type="checkbox"/>	 	<input type="checkbox"/>		
 OS-Children's Kwanzaa Books	Weeding Lists for Staff	WLSORporter		<input checked="" type="checkbox"/>	 	<input type="checkbox"/>		
E-mail Subscriptions								?
Subscription Name ^	Report/Document	Owner	Schedule	Recipient	Address	Personalized	Action	Unsubscribe
 List Items - Basic	List Items - Basic	WLSORporter	15th day of the month (10:00 pm EST)	WLSORporter	Melissa Klein	<input checked="" type="checkbox"/>	 	<input type="checkbox"/>
 List Items - Basic 1/18/18 1:25:20 PM	List Items - Basic	WLSORporter	15th day of the month (10:00 pm EST)	WLSORporter	Melissa Klein	<input checked="" type="checkbox"/>	 	<input type="checkbox"/>

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