Report Migration to BLUEcloud Analytics

HELLO!

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LEARNING OBJECTIVES

- ◉ Identify where reports will live after the migration.
- ◉ Perform basic customizations to reports in BCA.
- ◉ Subscribe to customized reports to receive them via email.
- ◉ Recall where to find more information on reports recommended by the MSC staff.

Where do I go for reports after the migration?

1

REPORT HOMES AFTER MIGRATION

BLUEcloud Analytics (BCA)

◉ **Statistical reports**, e.g., circ transactions, counts of items/users, etc.

◉ **Lists**, e.g., weeding, inventory, missing, lost, etc.

◉ **Bill reports**, e.g. daily cash.

◉ **Some hold reports**: purchase alerts, ratios, statistics.

WorkFlows

◉ **Notices**, e.g., overdue, assumed lost, etc.; some notice-like with PII (ticket).

◉ **System work** reports that do heavy lifting in the background, e.g., process long overdue (PLO), acquisitions, spine labels

◉ **Some transit** lists.

Right Now

Reports are already in BCA!

If you can't find what you need, open a ticket.

December 15th

Can't create new reports in WF.

Still have Scheduled reports (Finished tab), in-use templates (Schedule > Template)

December 30th

Have set up your email subscriptions in BCA to make your life easier (recommended).

January 31st

WF scheduled reports suspended; templates archived.

(Exceptions on previous slide.)

How can I customize reports in BCA?

Examples taken from
BCA – Customizing Reports

2

USEFUL DEFINITIONS

Attribute:

A characteristic or quality of an item/user/hold/transaction; an item can have attributes like:

◉ Item cat1 (format - BOOK)

◉ Home location (STACKS)

◉ Barcode

Metric:

A quantifiable measure of data, such as:

◉ Sum of circ transactions

◉ Collection counts

How can I save my customized reports in BCA?

3

Examples adapted from
[BCA – Subscribing to a Report Using Email](#)
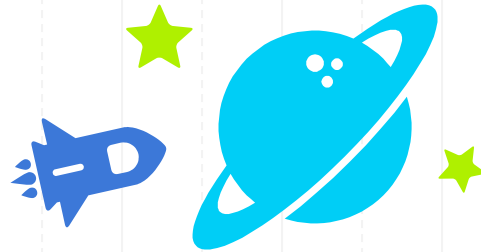[BCA Saving Reports (Personal View)](#)

What are some "core reports"
I should start with?

Examples taken from
BCA – Core Report List

4

Questions?

THANKS!

Any other questions?

You can find us at our online help desk:

https://desk.zoho.com/portal/montanastatelibrary/en/home