BLUEcloud Analytics

Creating reports and Dashboards with Analyst Account

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Four County Library System
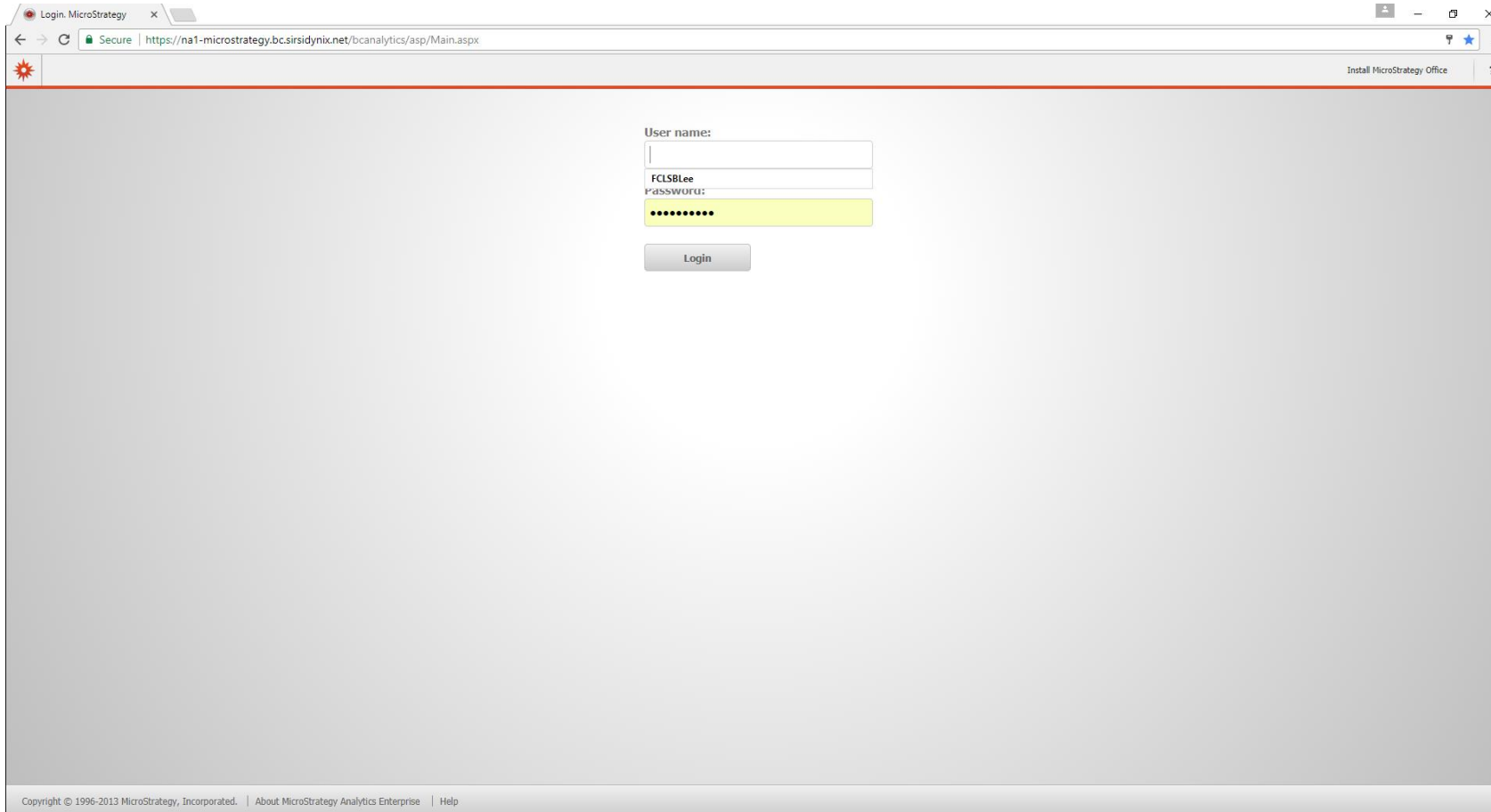
To log in: https://na1-microstrategy.bc.sirsidynix.net/bcanalytics/asp/Main.aspx
User name:
Password: changeme (you'll have to change)
The level of access is Analyst. With this level you will be able to use the preexisting reports and save them to your own folder. Analyst are also able to create dashboards for presentations.

Once you've entered into the BCA FCLS folder you now have the option to view Shared Reports or My Reports. Any report created by FCLS will be available in the Shared Reports folder. You will be able to run these reports and reset them with data specific to your library. The My Reports folder is only available to your Log in information. If you want help with a report or to share it with other directors or staff you will have to save it the Shared Report Folder.
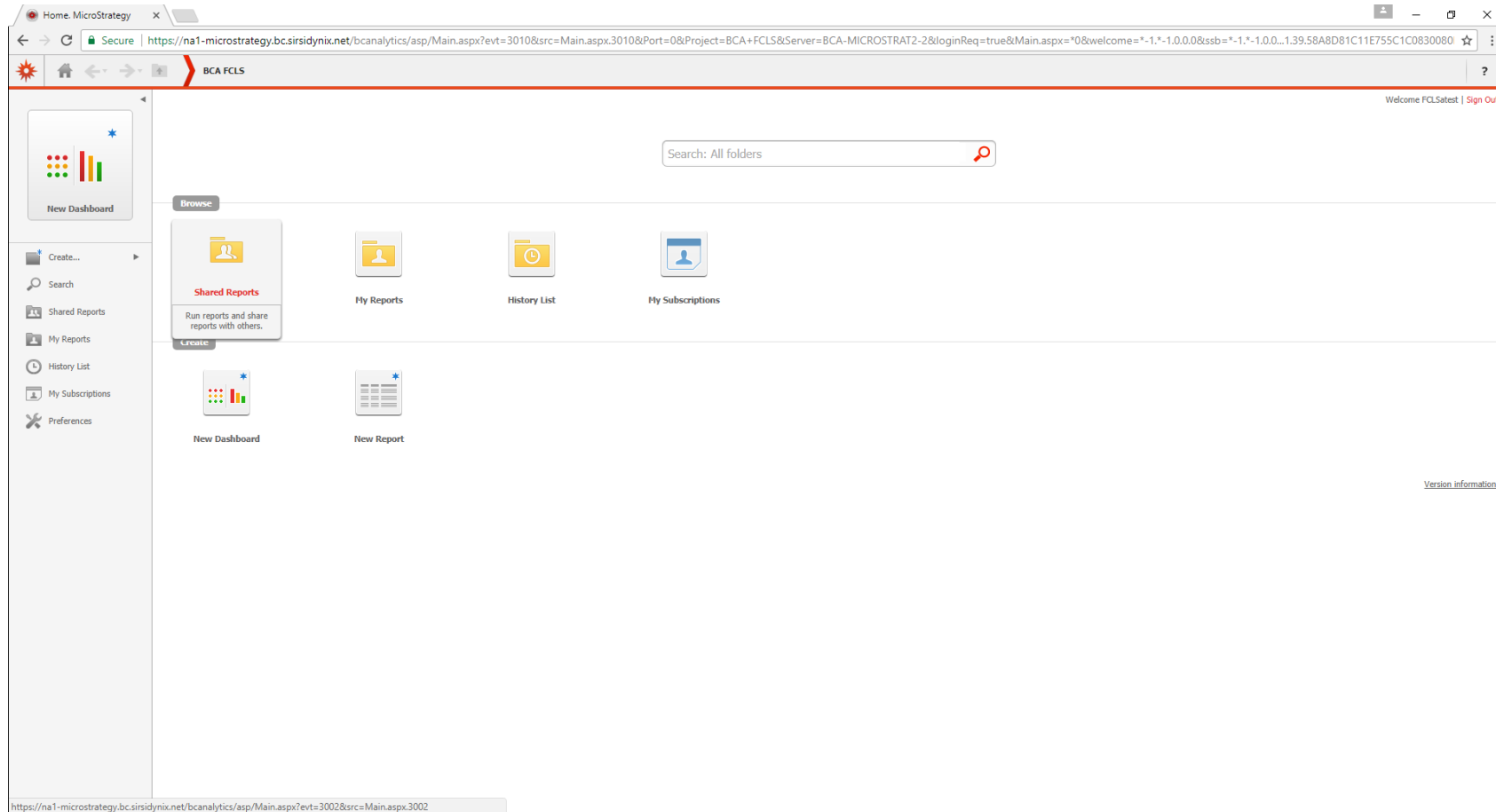
To start click on the Shared Report Template designed by FCLS.
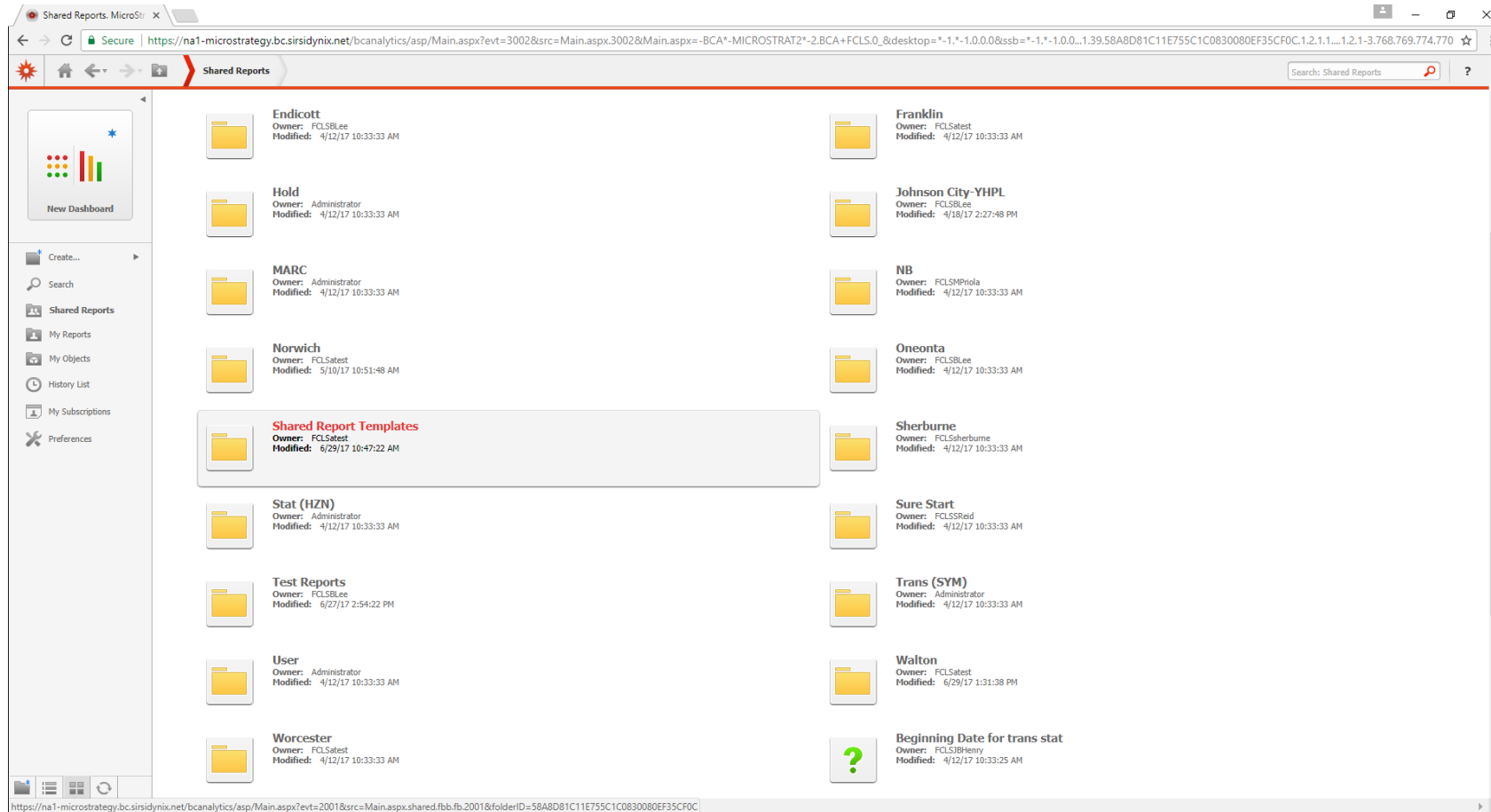
FCLS has tried to create reports to help with collection development, weeding, and with keeping track of patron information. To start, we'll take a look at a weeding list. Click on Weeding List for All (A).

The weeding list is designed to provide the necessary information to help with weeding. We've included Call Number, Barcode, Title, Author, Pub Year, Item Creation Date (for the specific library item), Last Activity Date, Item Status, and Item Legacy Total Charges (BCA differentiates between checkouts and renewals).

BCA has differentiated between catalog and item for the collection. Catalog is for information general to the item across the system, such as author and title. Item is for the specific item of your collection. This is why the heading on the report below shows item call number and catalog title.

We designed the report with drop down menus for certain attributes that will determine the library, type of item and intended age of the patron. In this case we'll run a report for the Afton Free Library, with Item Category1 as BookNF, and Item Category2 Adult.

The report below can now be saved by clicking on the floppy disk icon (A), printed (B), or exported to an Excel Spreadsheet (C).

However, the user can narrow down the report by right clicking on any heading, in this case the Item Call Number, this will open up an new drop down menu where you can sort in ascending or descending order, take the column off the grid (this is handy for columns you don't need), or in this example to Filter. We want to create a weeding list for a Dewey ranges of 100s and 200s.

When you click on Filter the report will change and a View Filter section opens. In this case we want to change from Select (A) to Qualify (B). Select has preset terms and call numbers, about 516,388 different call numbers, we don't have time to go through all of that so we'll stick to Qualify. Now click on Between (C). This will allow us to enter the ranges we need. In this case 100;300 , this will set the report for the Dewey range we need. After you've made sure the range is correct be sure to click on Apply.

You're report now has the Dewey ranges you wanted and can be either saved to your folder, printed, or exported to a spreadsheet.

Because these reports are templates for all 4CLS libraries to use the user has to be sure to save them carefully. Once you've click on the floppy disk icon a Confirm Save warning will appear. You do not want to click on Yes, this will alter the template, instead click on No. This will open to another menu.

By using the drop down menu you can save the report to My Reports or to your libraries folder in the Shared Reports.
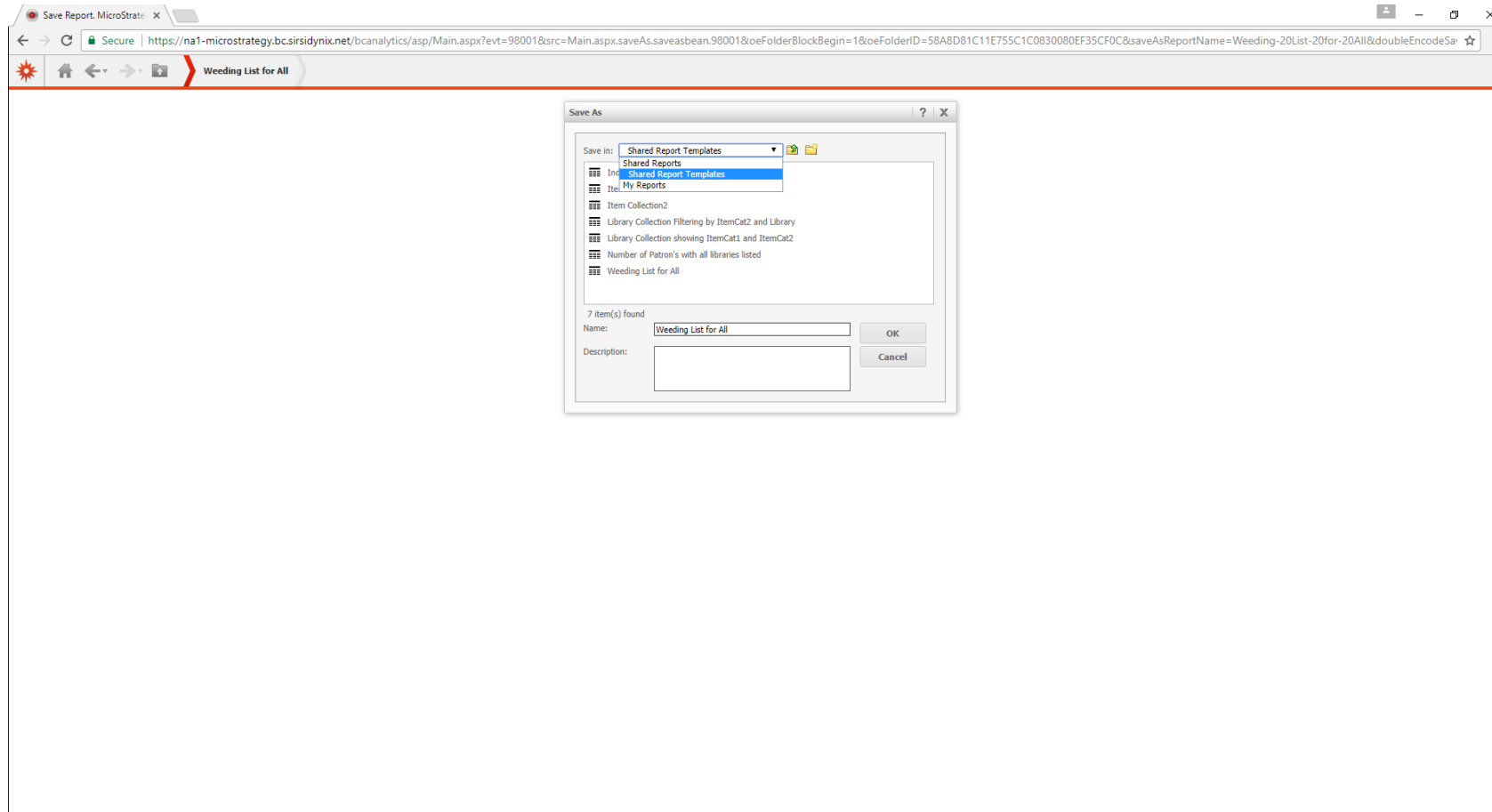
Running a Dashboard from a shared report. BLUECloud Analytics allows all users to view reports as well as run Dashboards to pull data from those same shared reports.
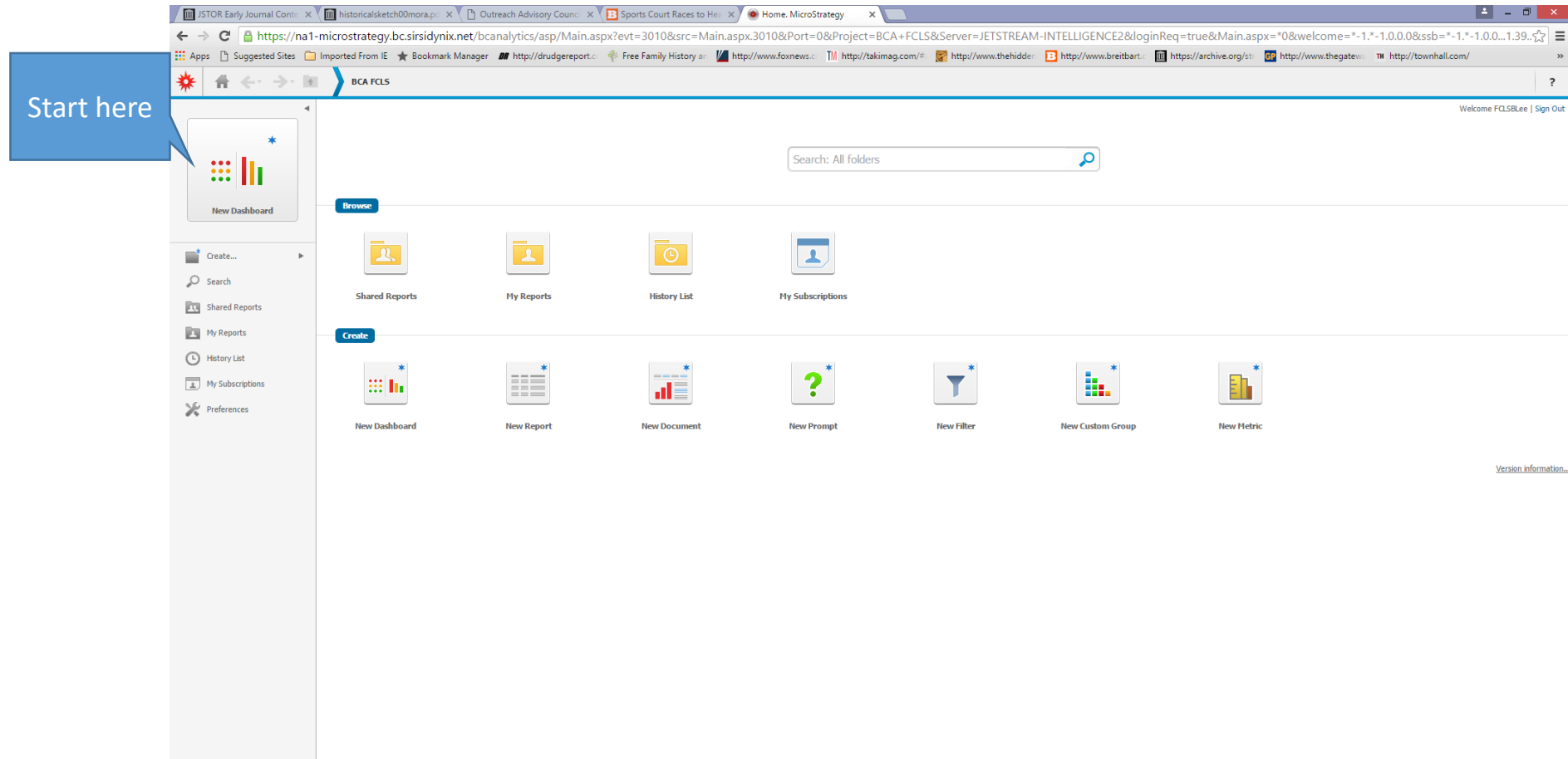
After choosing New Dashboard BLUECloud (BC) will prompt the user to pick from several folders and reports. The drop down menu (A) will allow you to use your own reports or shared ones. In this example we'll click on Number of Patrons with all libraries listed(B).
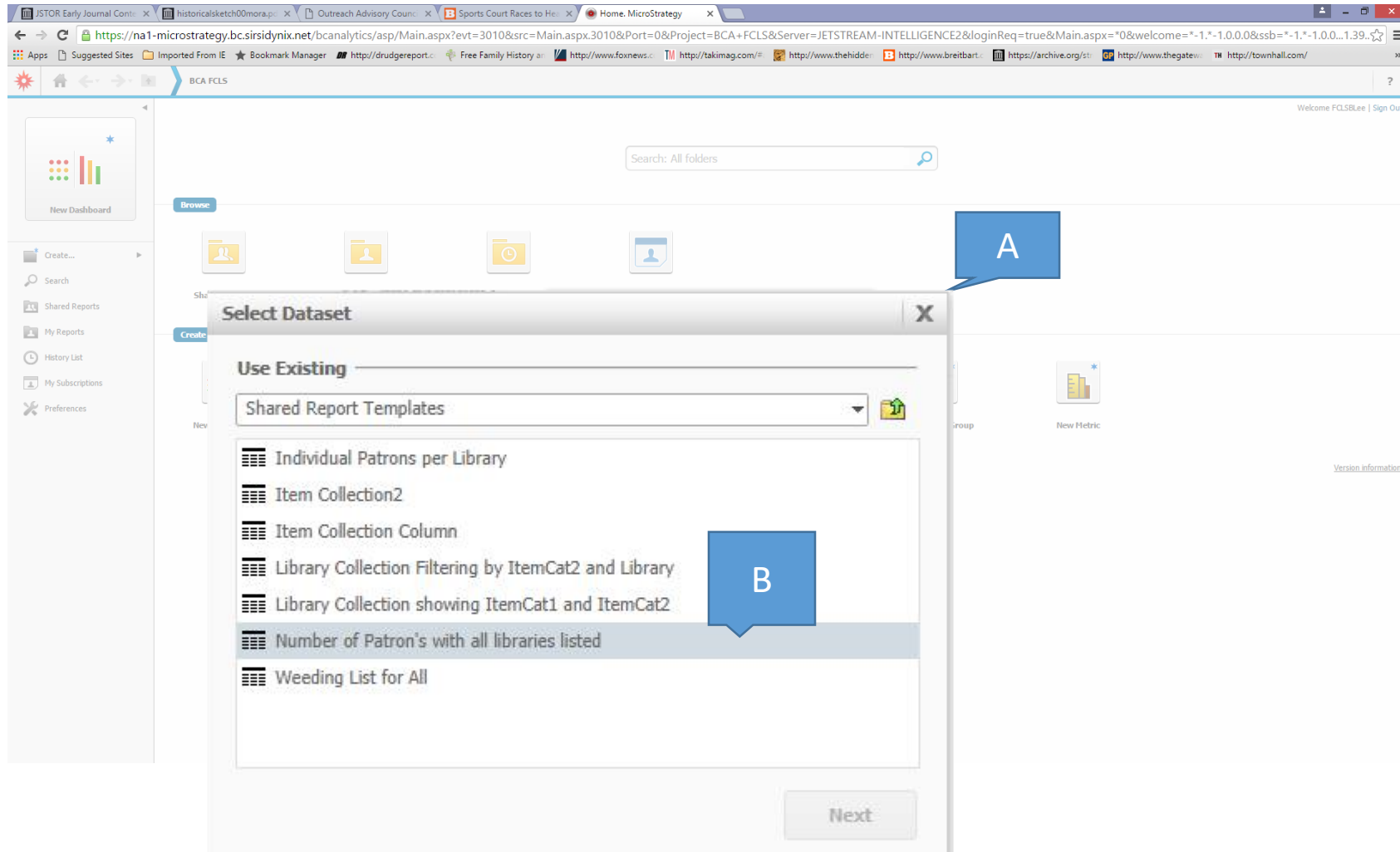
At this point the dashboard appears plain, it is up to you to decide what needs to be added to the report, what needs to filtered, and whether or not to add metrics. In this case we want to compare our number of blocked patron's to those of other libraries serving similar size populations in the 4CLS. We'll start with moving the metric for Number of Users to the Metrics Grid (A).
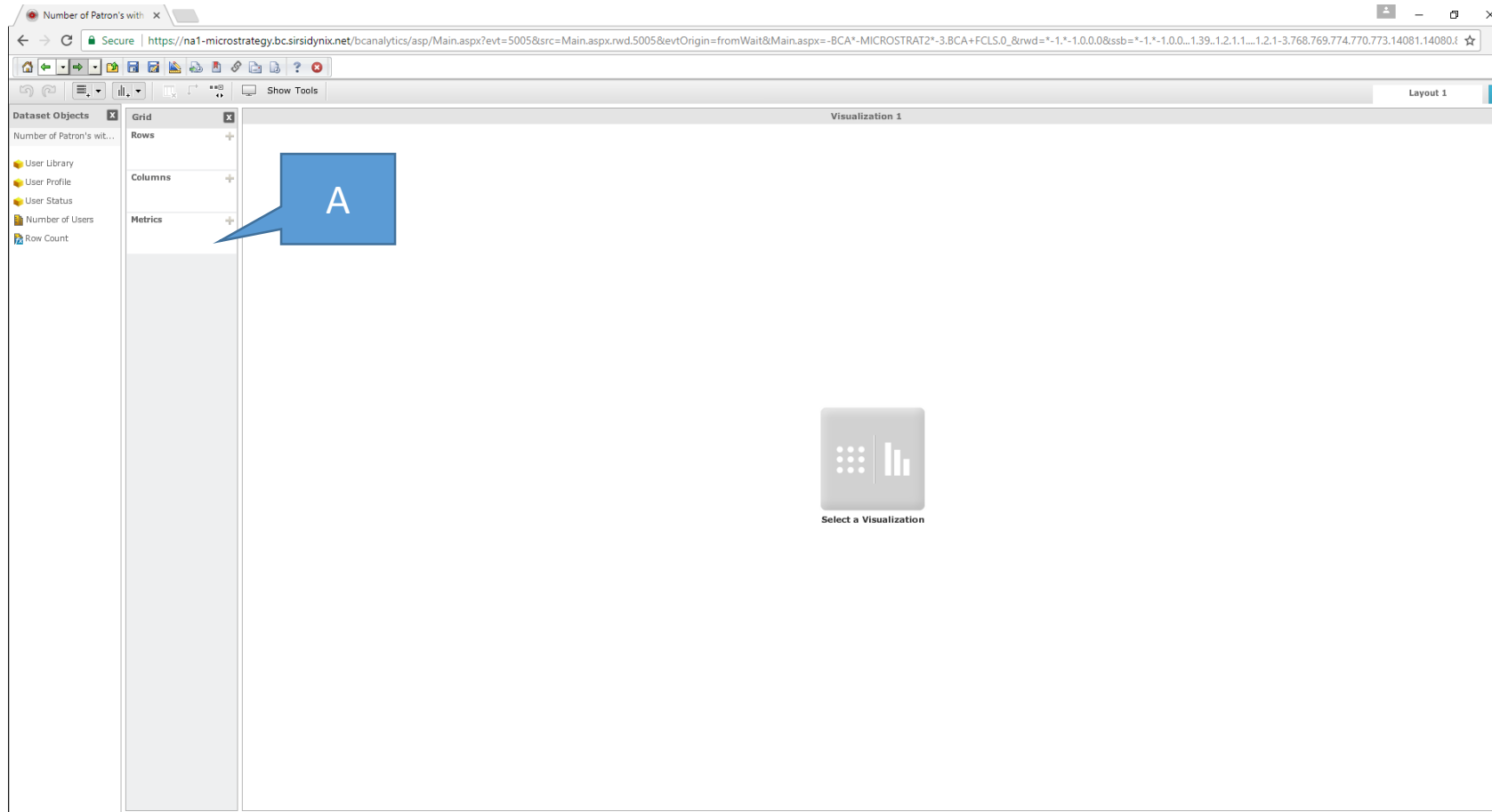
Once that was done we moved User Library to the Rows grid. User Profile was put in the template report but isn't required for our dashboard. Instead we'll add User Status to the Columns grid to get a sense of whether or not we want it on the report or to filter the data.

As you can see by adding it to the Columns grid you are able to compare all of your User Statuses with other libraries. Now we'll narrow the data down futher by filtering out libraries. Start by holding the curser over User Library, when you see the downward facing arrow (A), click on it and a new drop down menu will open up, select for Add to Filters (B)

You can now click off any libraries you don't want to see data for. We'll set the report for Afton, Cherry Valley, Cannon Free, and Oxford Memorial. The new report is much smaller and easier to compare the data.

Visualization 1

User Status	BARRED	BLOCKED	COLLECTION	DELINQUENT	OK
User Library	Number of Users	Number of Users	Number of Users	Number of Users	Number of Users
Cherry Valley Memorial Library	4	74		127	237
Cannon Free Library	64	319	1	589	1,237
Oxford Memorial Library	31	520	8	350	1,153

Visualization 1

User Status	BARRED	BLOCKED	COLLECTION	DELINQUENT	OK
User Library	Number of Users	Number of Users	Number of Users	Number of Users	Number of Users
Afton Free Library	14	341	6	332	510
Andes Public Library	5	17		42	547
Bainbridge Free Library	14	54	3	61	428
Broome County Public Library	516	12,201	3,581	7,203	13,560
Bovina Public Library		1		10	83
Cherry Valley Memorial Library	4	74		127	237
Village Library of Cooperstown	30	720		715	1,731
Cybermobile	9	230	1	59	541
Cannon Free Library	64	319	1	589	1,237
Deposit Free Library	2	212	7	113	725
Edmeston Free Library		1			5
George F. Johnson Memorial Library	506	5,688	1,016	6,368	7,811
Four County Library System	4	4		37	160
Fenton Free Library	2	17	1	86	739
Skene Memorial Library		1		5	40
Franklin Free Library		50	1	90	281
Gilbertsville Free Library	2	21		46	519
Moore Memorial Library	7	577	13	498	1,749
Louise Adelia Read Memorial Library	16	470	2	439	581
Kinney Memorial Library	2	73		27	626
Your Home Public Library	804	1,944	665	1,137	2,872
Lisle Free Library	26	44	2	52	736
Fairview Public Library	4	157	1	193	763
Masonville Library	1	28		21	64
McDonough Library		13		14	57
Milford Free Library				1	5
Village Library of Morris		44		18	353
New Berlin Library	22	254	2	207	739
Nineveh Public Library	2	9		11	123
Guernsey Memorial Library	75	2,965	552	3,455	5,114
Huntington Memorial Library	31	2,204	415	1,183	5,337
Harris Memorial Library	2	5		5	43
Oxford Memorial Library	31	520	8	350	1,153
Richfield Springs Public Library	4	244		298	492
Roxbury Library Association		2		9	122
Sherburne Public Library	283	247	7	355	1,064
Sidney Center Library	4	44		25	89
Sidney Memorial Public Library	46	1,712	14	1,201	2,680
Smyrna Public Library	5	12		12	116
South New Berlin Free Library	6	30	1	24	219
Springfield Library	1	5		9	177
Stamford Village Library	13	413		557	850
Unadilla Public Library	10	82		78	816
Vestal Public Library	105	3,359	81	5,331	5,785
William B. Ogden Free Library	9	685	3	885	1,092
Mary Wilcox Memorial Library	17	576	12	486	799
Worcester Free Library	6	133		128	518

For more splash you can add visualizations and graphs to the dashboard. Click on (A) and a second Visualization will open next to the report, click on (B) and a new section will open whereby the user can select the type of chart (C).

As you can see there is now a graph comparing your patrons to other libraries serving the relatively same size patron base. Save the dashboard as you would any other report.
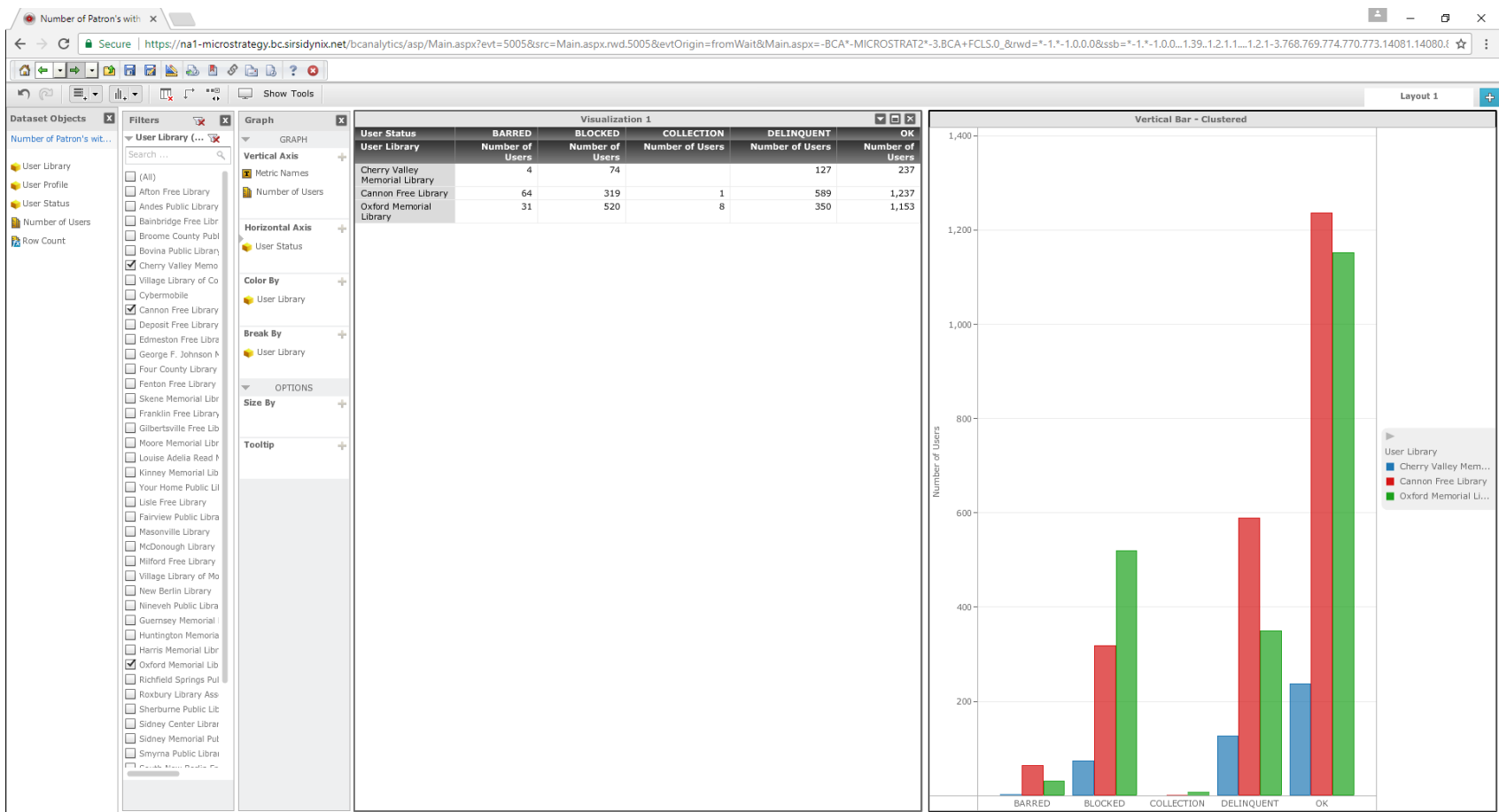
Other reports in the Shared Report Templates folder are designed in similar fashion to the weeding report. Be sure to set for your library.