BLUEcloud Analytics

Creating reports and Dashboards

Four County Library System

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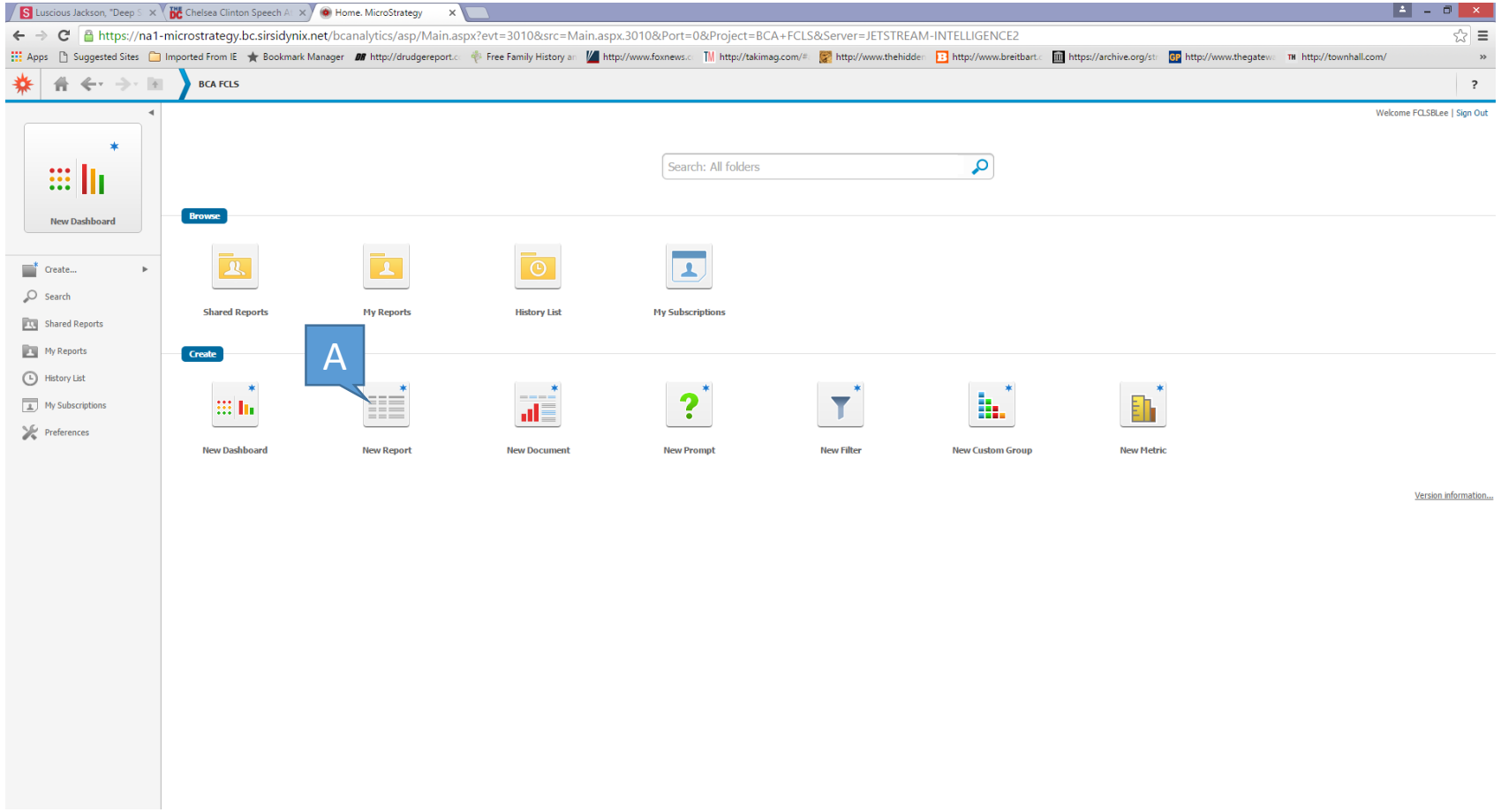
To log in: https://na1-microstrategy.bc.sirsidynix.net/bcanalytics/asp/Main.aspx

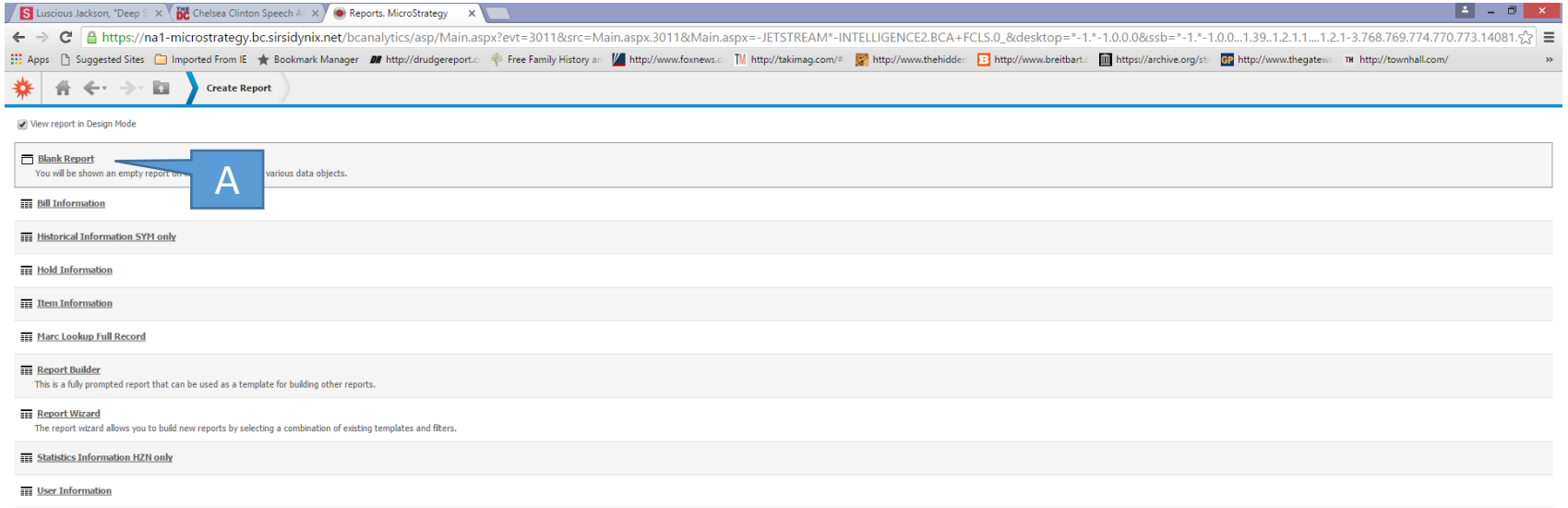
User name:

Password: changeme (you'll have to change)

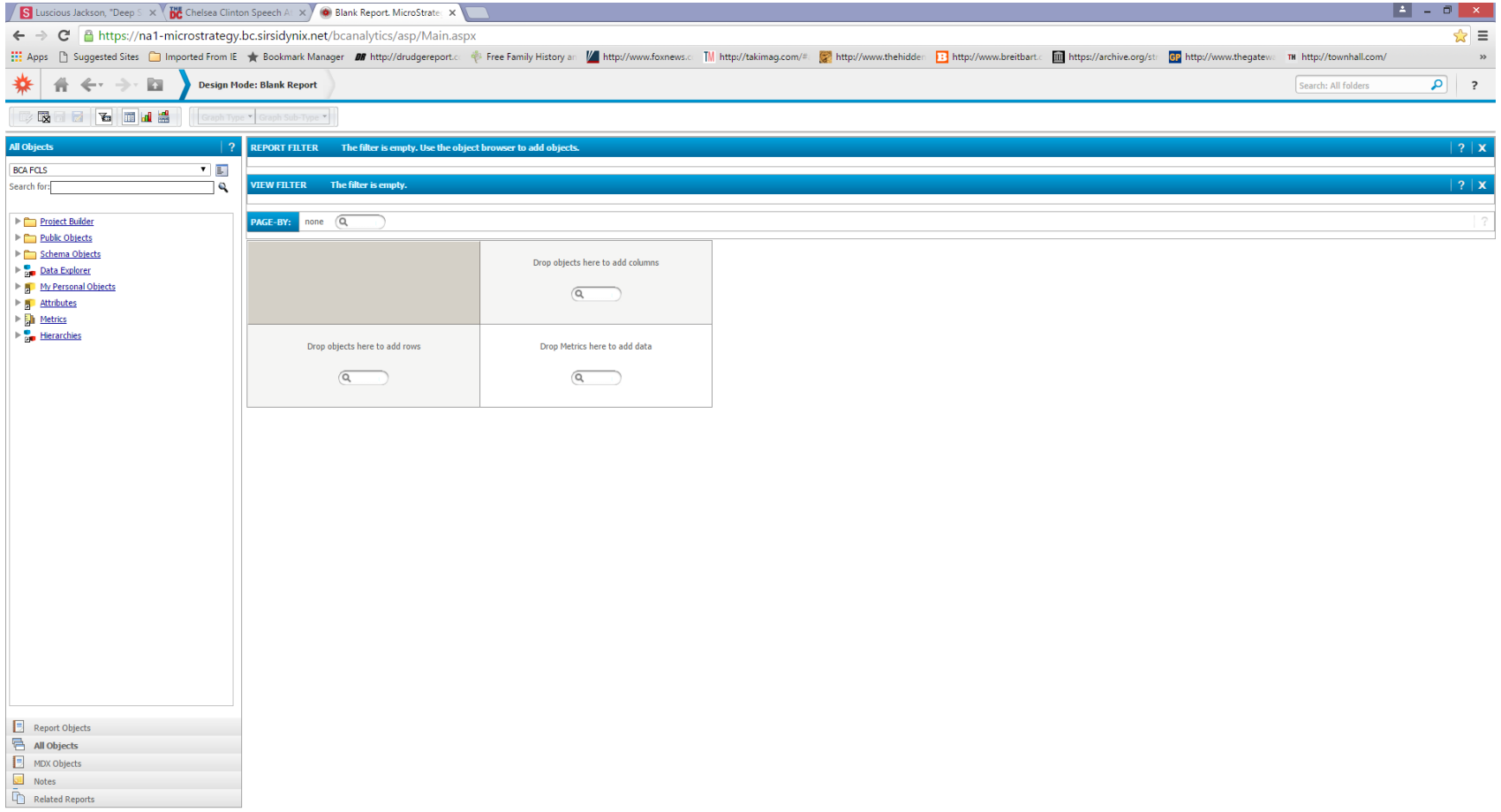
Start from the main page. To design your own report start with New Report (A).



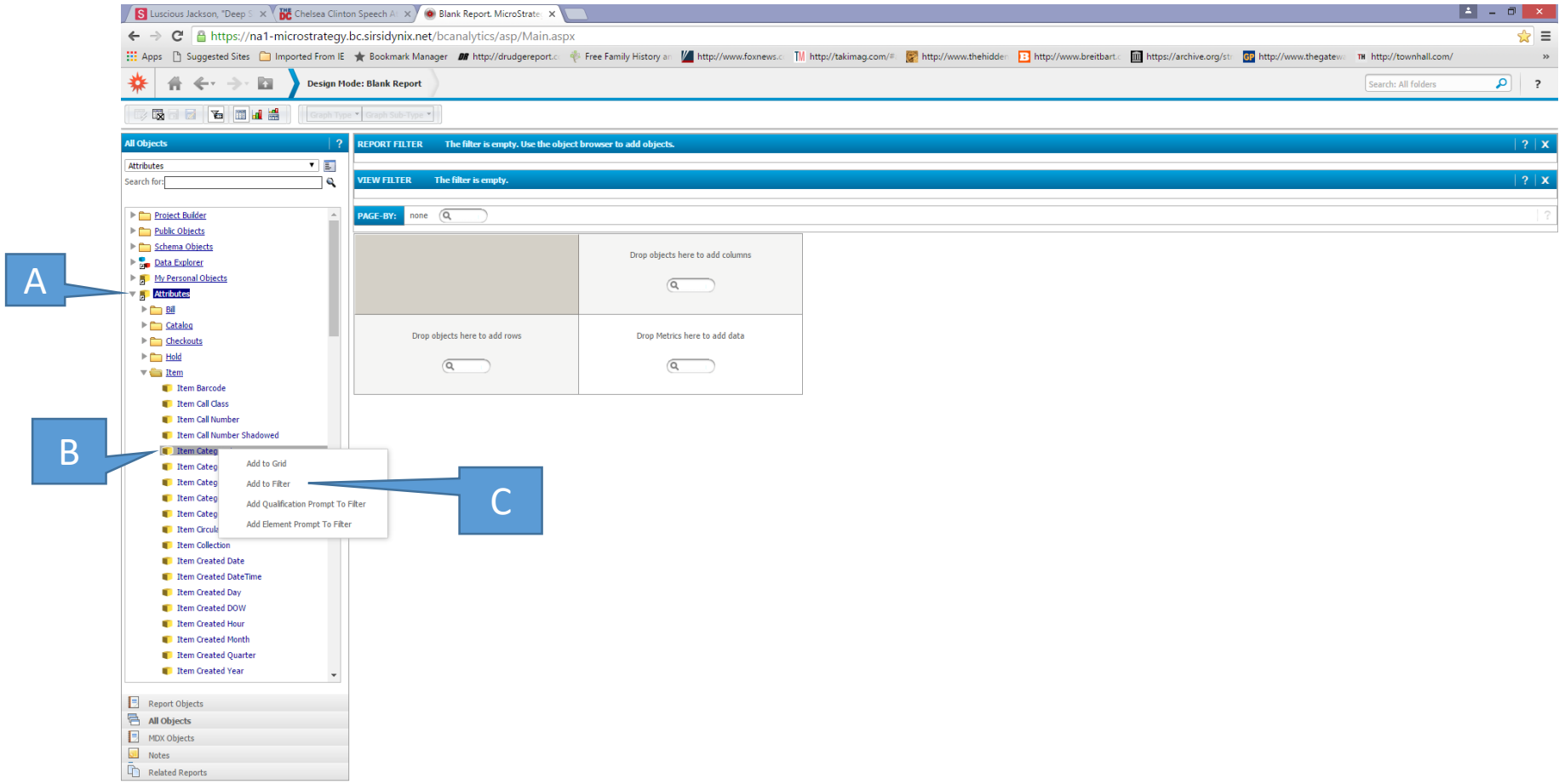
At the top you will see Blank Report, click here (A).



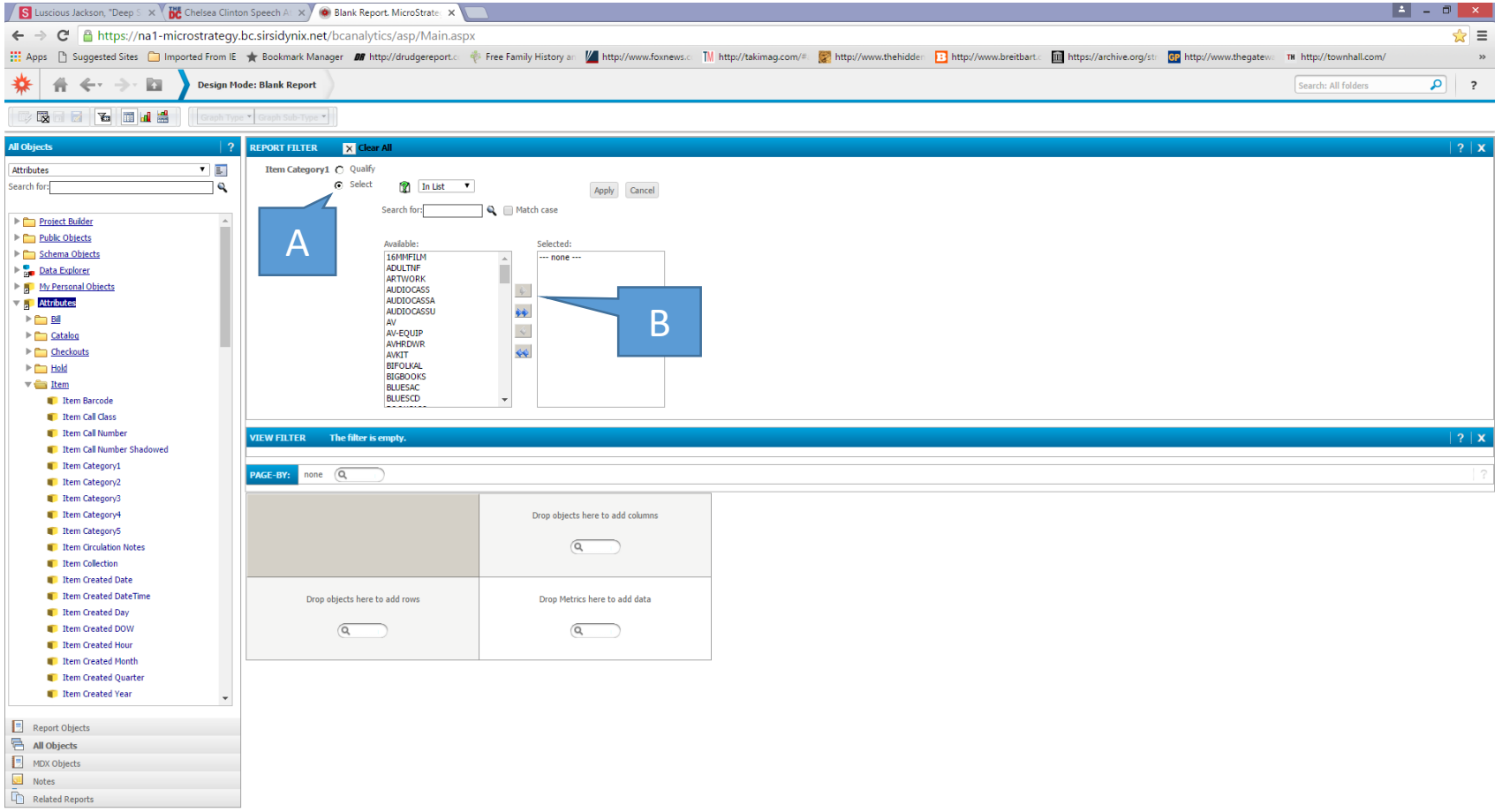
This is the basic interface. The first step is to differentiate between what data you want in the reports and what data you want to filter into or out of the report. In this case we are designing a weeding list showing items from Cat 1, Cat 2, and for a specific library. Will we filter for these three Attributes.



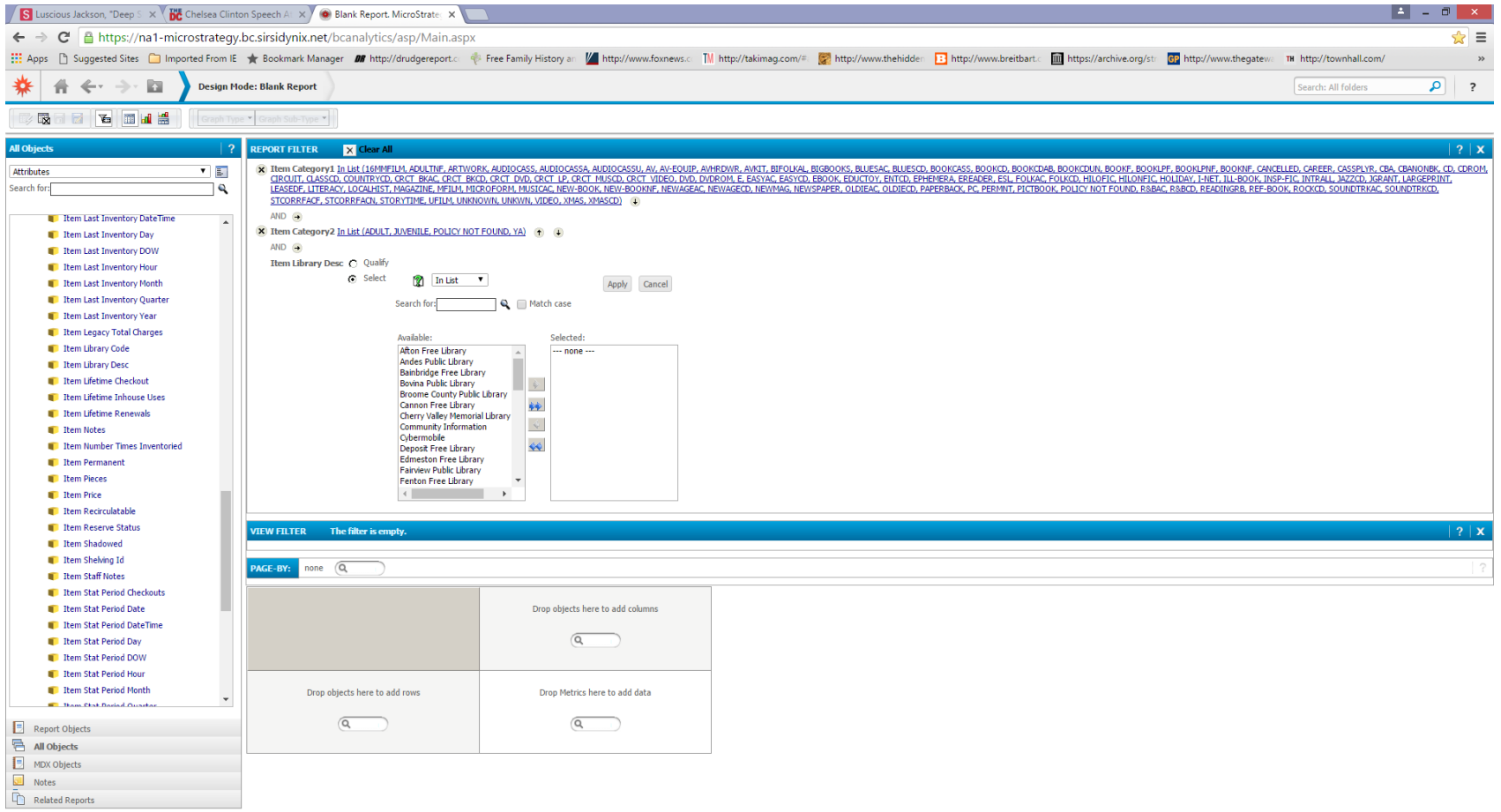
Start with clicking on Attributes (A), open up the list for Item Category 1 (B), right click to open up drop down menu and click on Add to Filter.



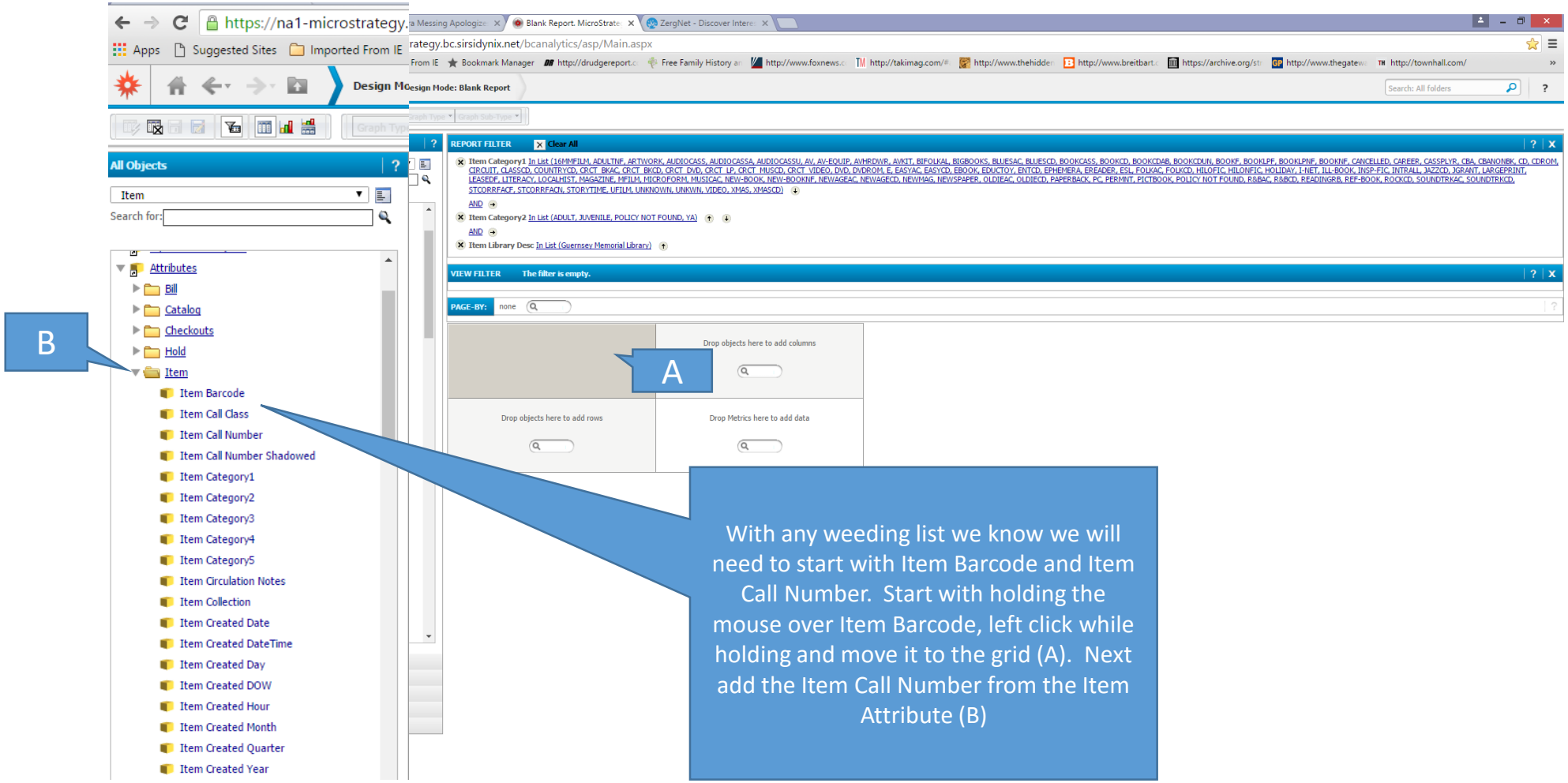
You have now added Item Category 1 to the Report Filter. Click on Select (A) to open up the list for all Item Category 1 data points. Use the list and select the appropriate Cat 1 items, highlight and either double click or use the arrows to move them to the Selected side (B).



Add Item Category 2 and Item Library Desc to the filter as well and filter the results.

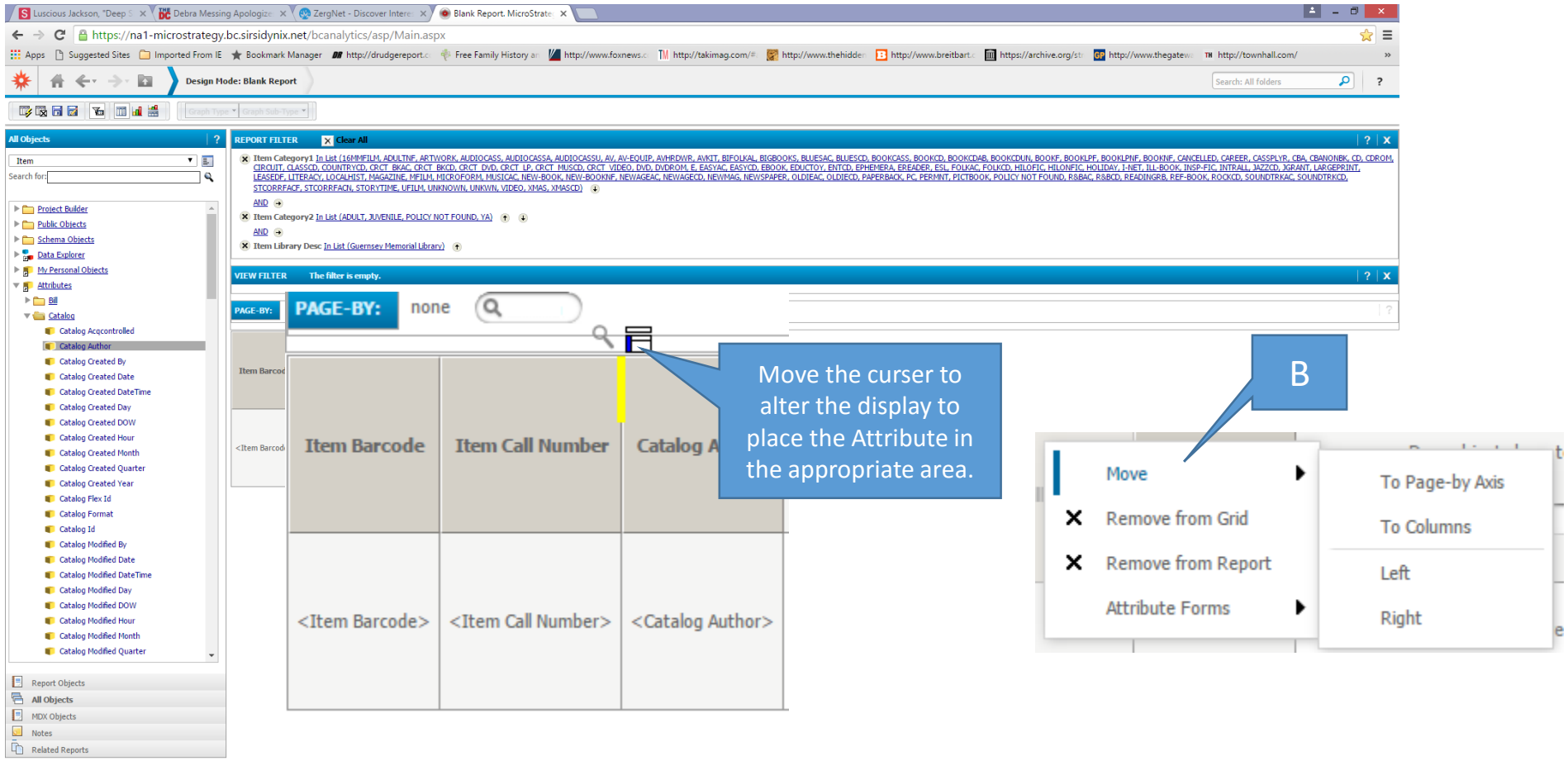


Once we have the filters in place we will then add attributes to the report. BLUECloud Analytics defines Attributes as, “objects in the cube that can give numbers context.” So we will begin by determining what data we need for the weeding list.

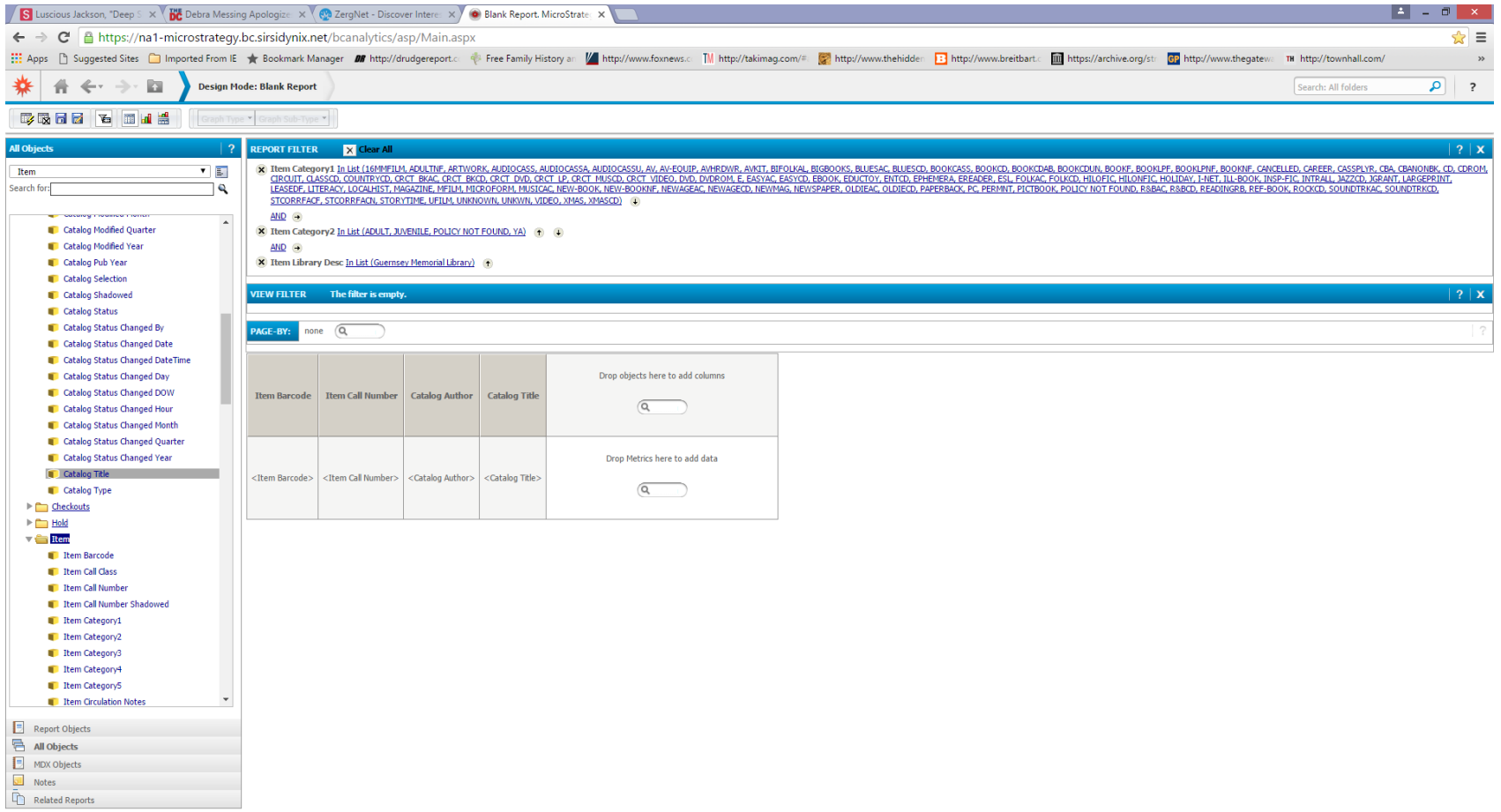


With any weeding list we know we will need to start with Item Barcode and Item Call Number. Start with holding the mouse over Item Barcode, left click while holding and move it to the grid (A). Next add the Item Call Number from the Item Attribute (B)

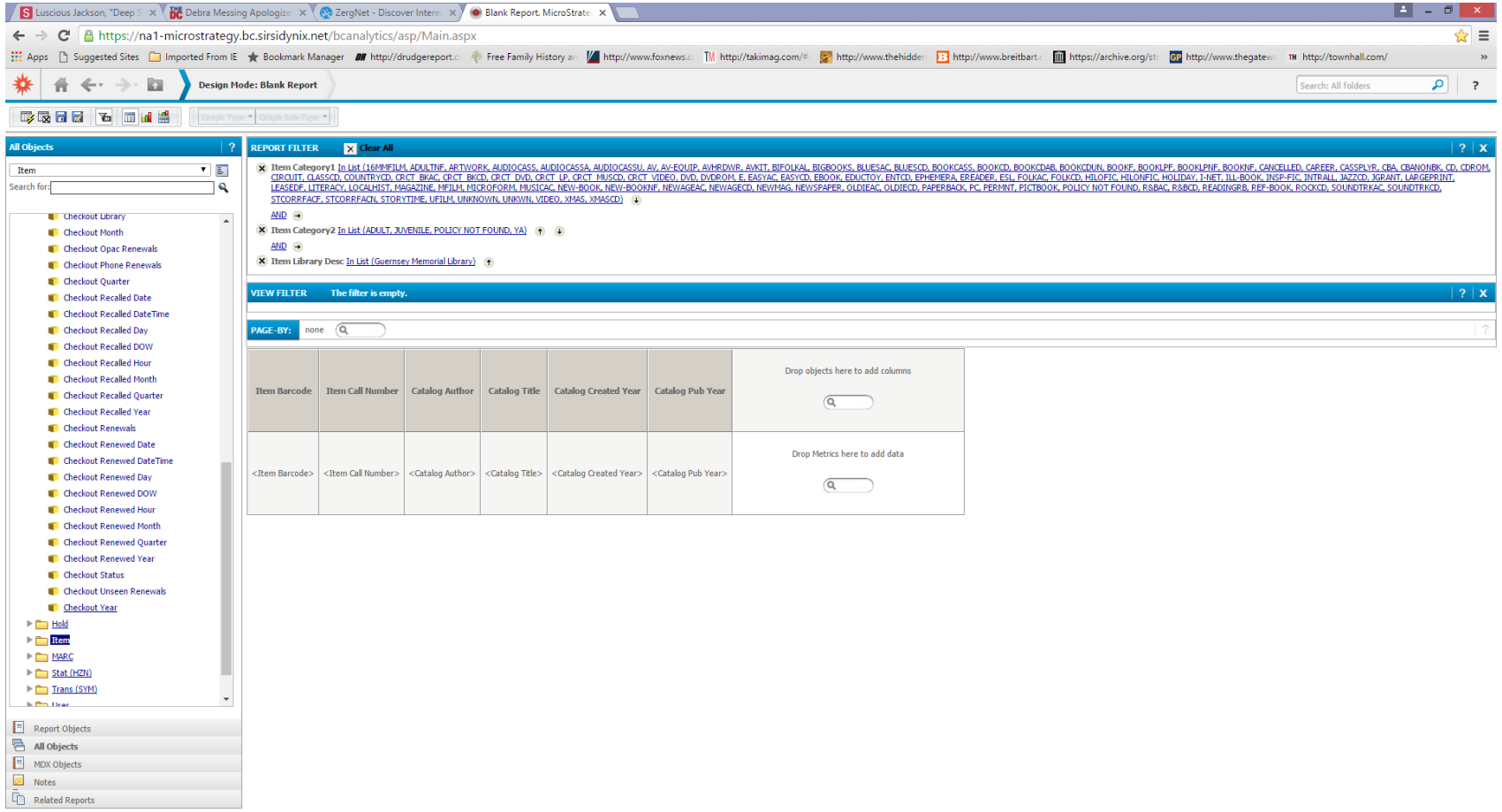
BLUECloud Analytics allows the user to determine the order of the report. This can be done in two ways. Using the icon (A) you can place the Attribute as a column or row. The second way is to right click on the attribute to open up a drop down menu and chose an action (B).



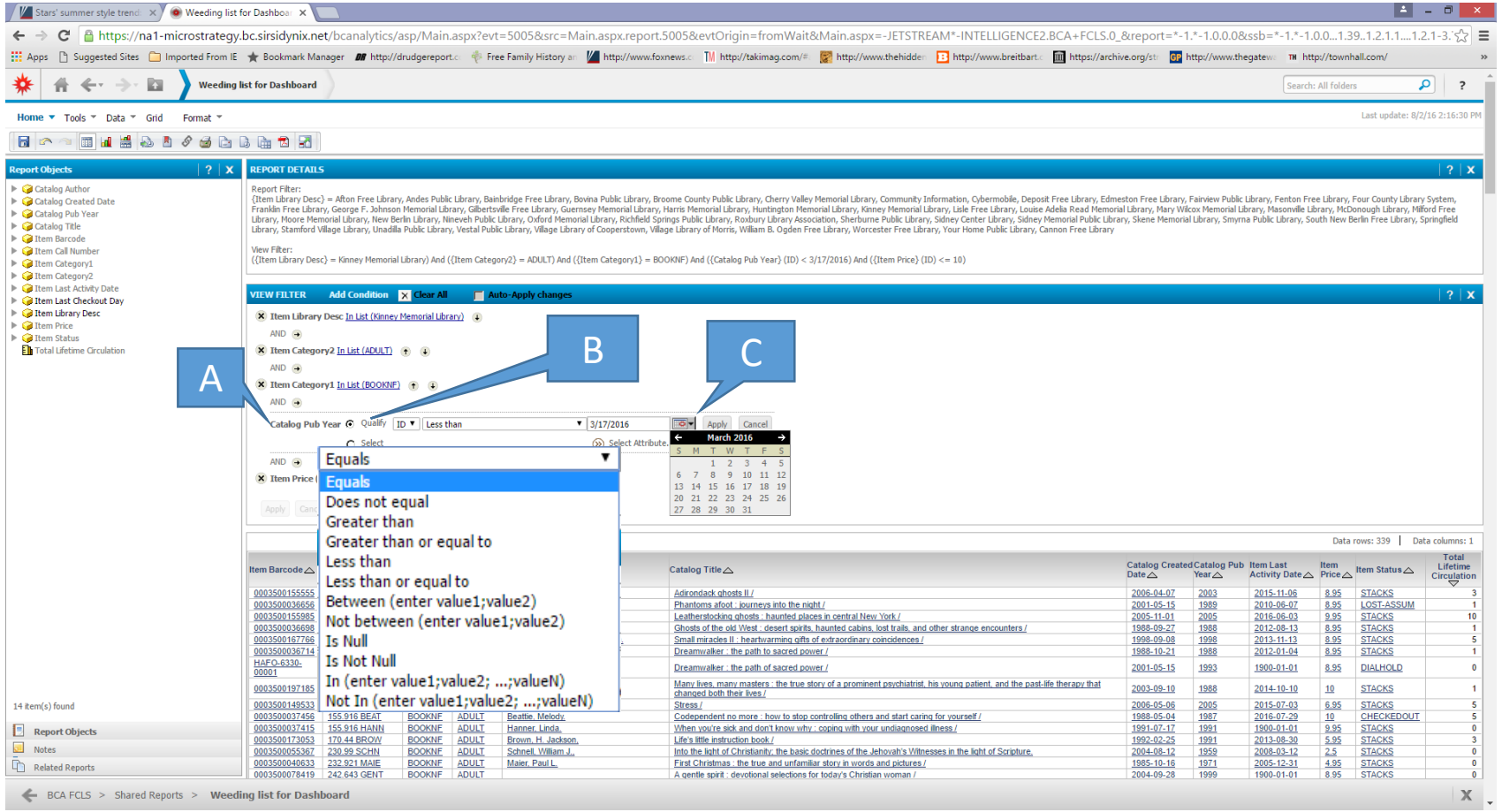
We'll add Catalog Author and Catalog Title to the report. Note these are listed under the Catalog Attribute, not Item Attribute. We'll also add Catalog Created date and Catalog Pub. Year to our report.



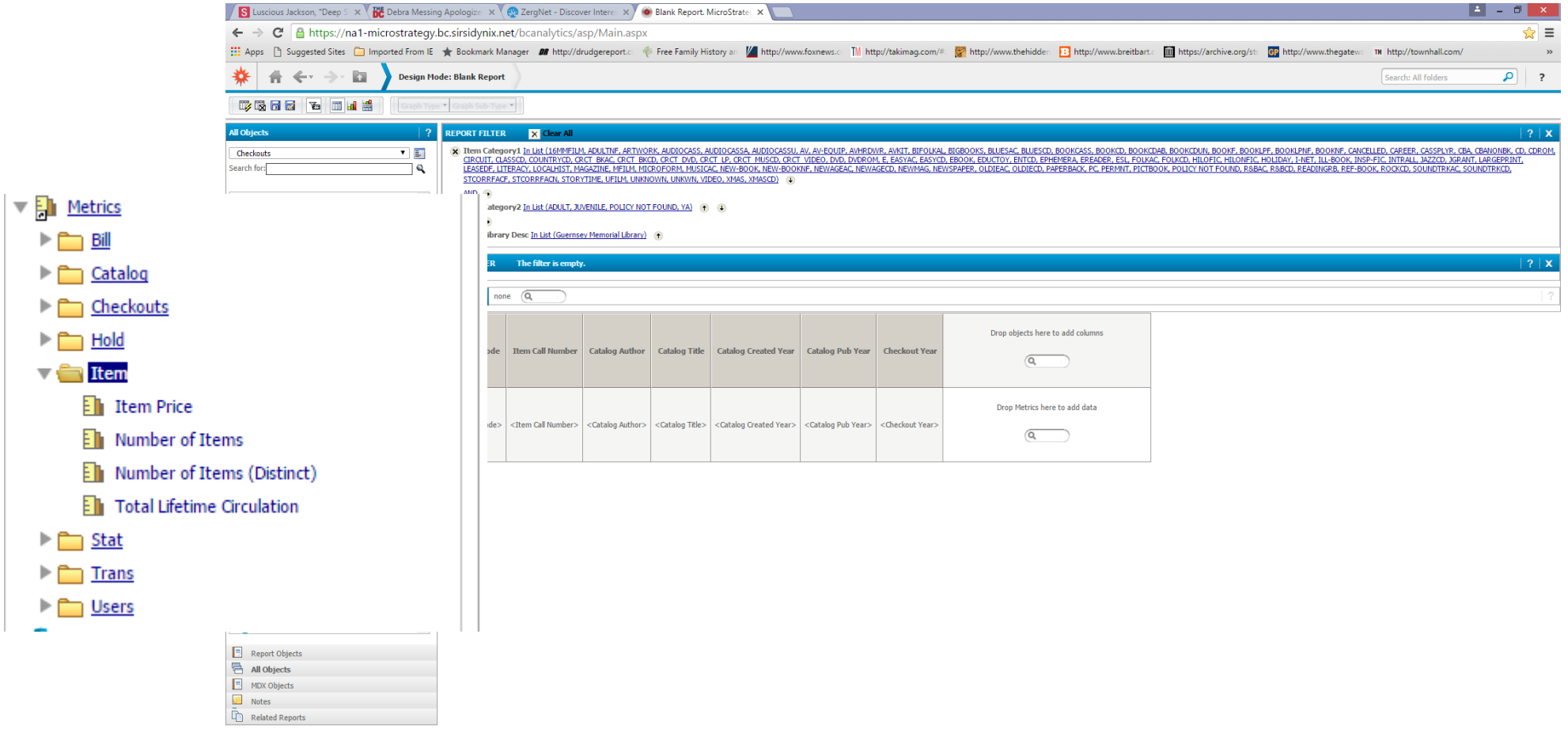
With any weeding list we want the list to reflect how well an item is circulating. We need information on when it was last checked out and how often. We'll start with the last check out year. We'll change to the Checkout Attribute, we can chose from many options including year, quarter, month, and day.



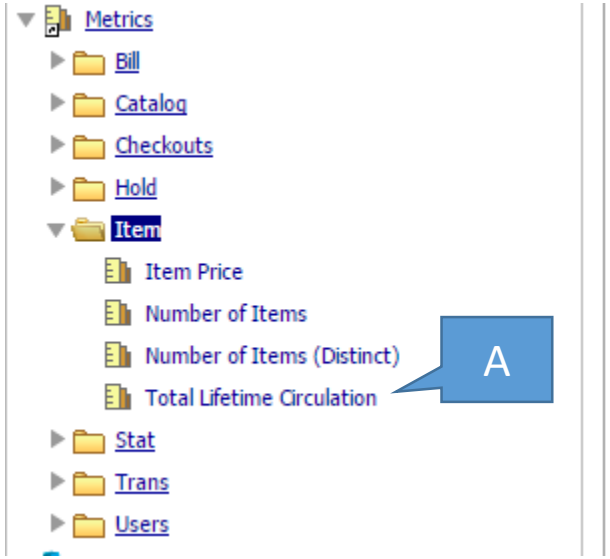
The user can also narrow down the time period. In this case the range of dates the books were published. Under Catalog Pub Year (A), select Qualify (B). This will open to a drop down menu, select one, then select the menu function (C), choose the date range and hit Apply. The report will be sorted according to those dates.



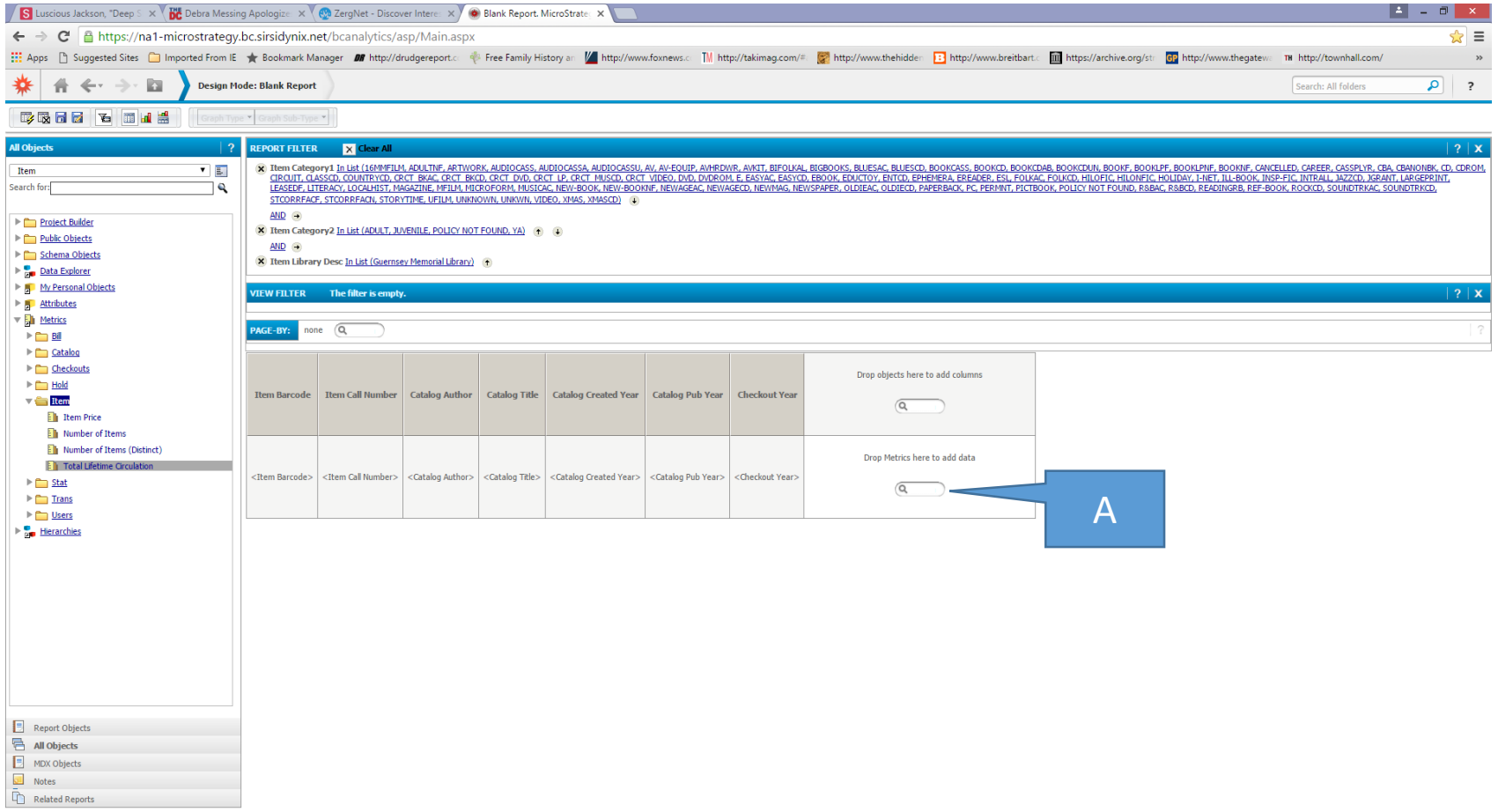
Now we'll add a Metric to the report to determine the total number of checkouts per each item. BLUECloud Analytics define metrics as, "objects in the cube that you will use to present numbers in your analysis." These include, as in this example, the Total Lifetime Circulation.



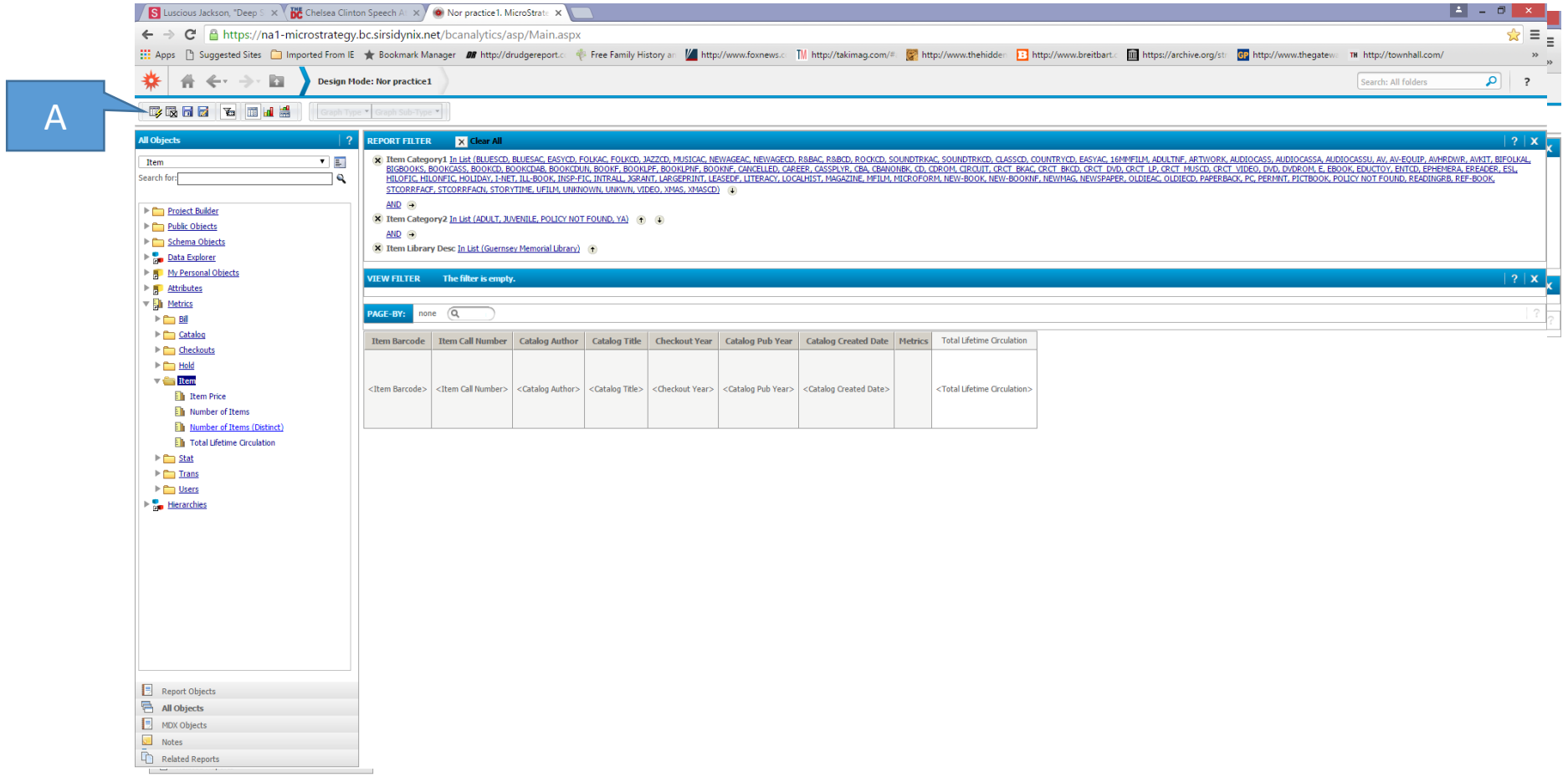
Click on the Metric folder, this will open up the list of available Metrics. As with the Attributes you'll need to look through them to familiarize yourself where the information is listed. In this case we need to open Item and then the Total Lifetime Circulation(A).



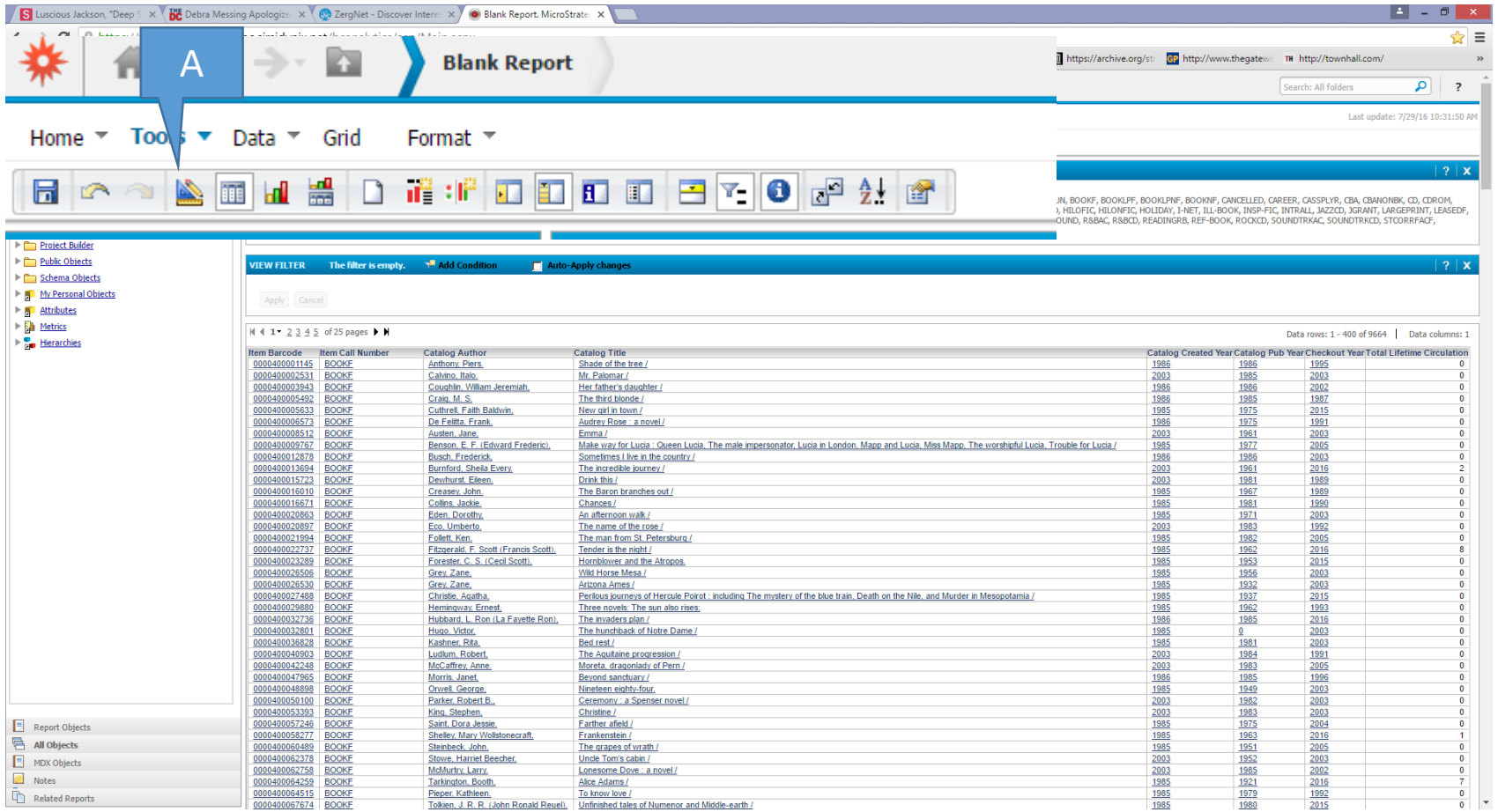
Move the Metric to the metric area in the report (A).



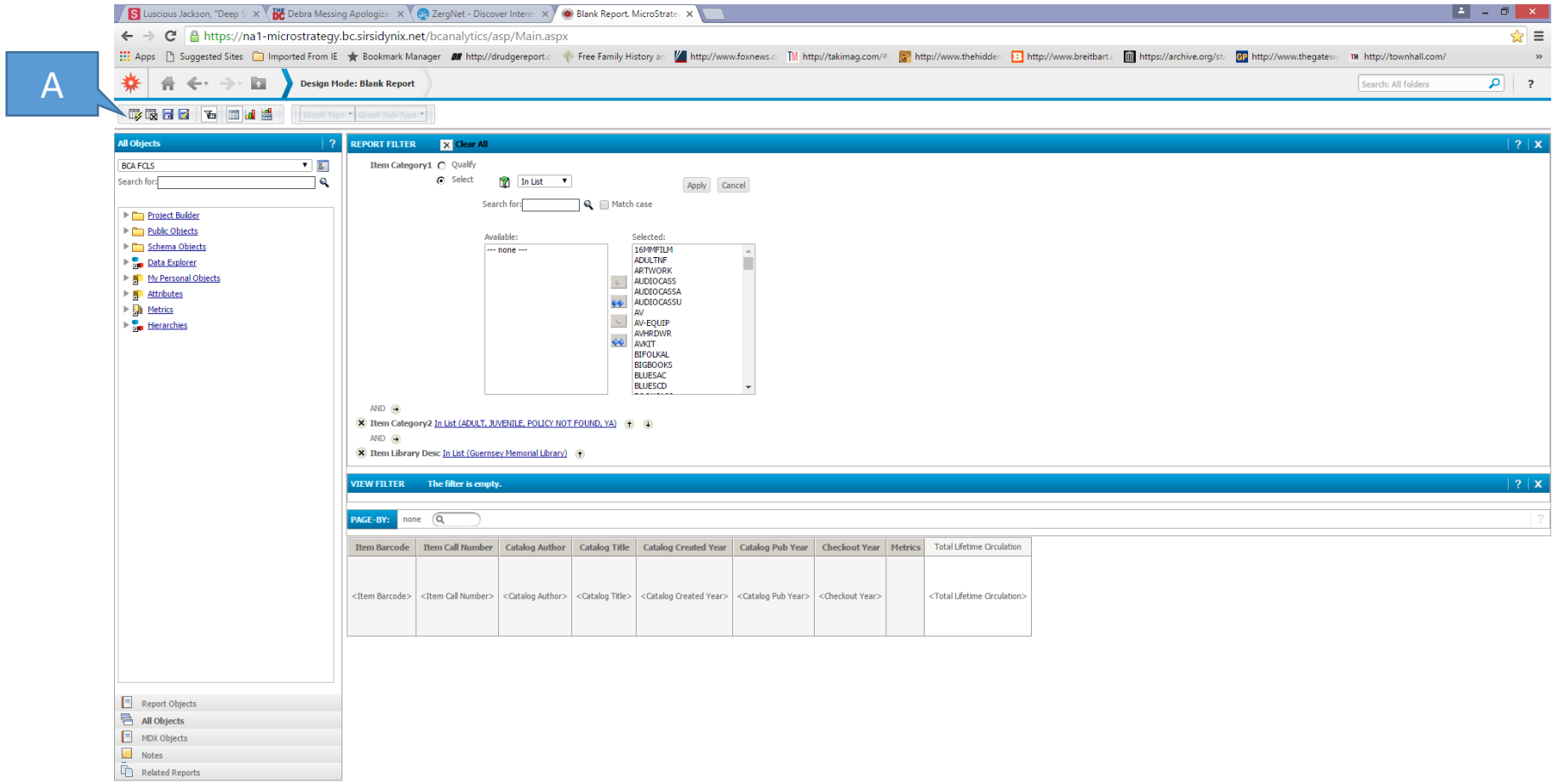
Once we have all of our Attributes and Metrics, click on the report icon (A) to run.



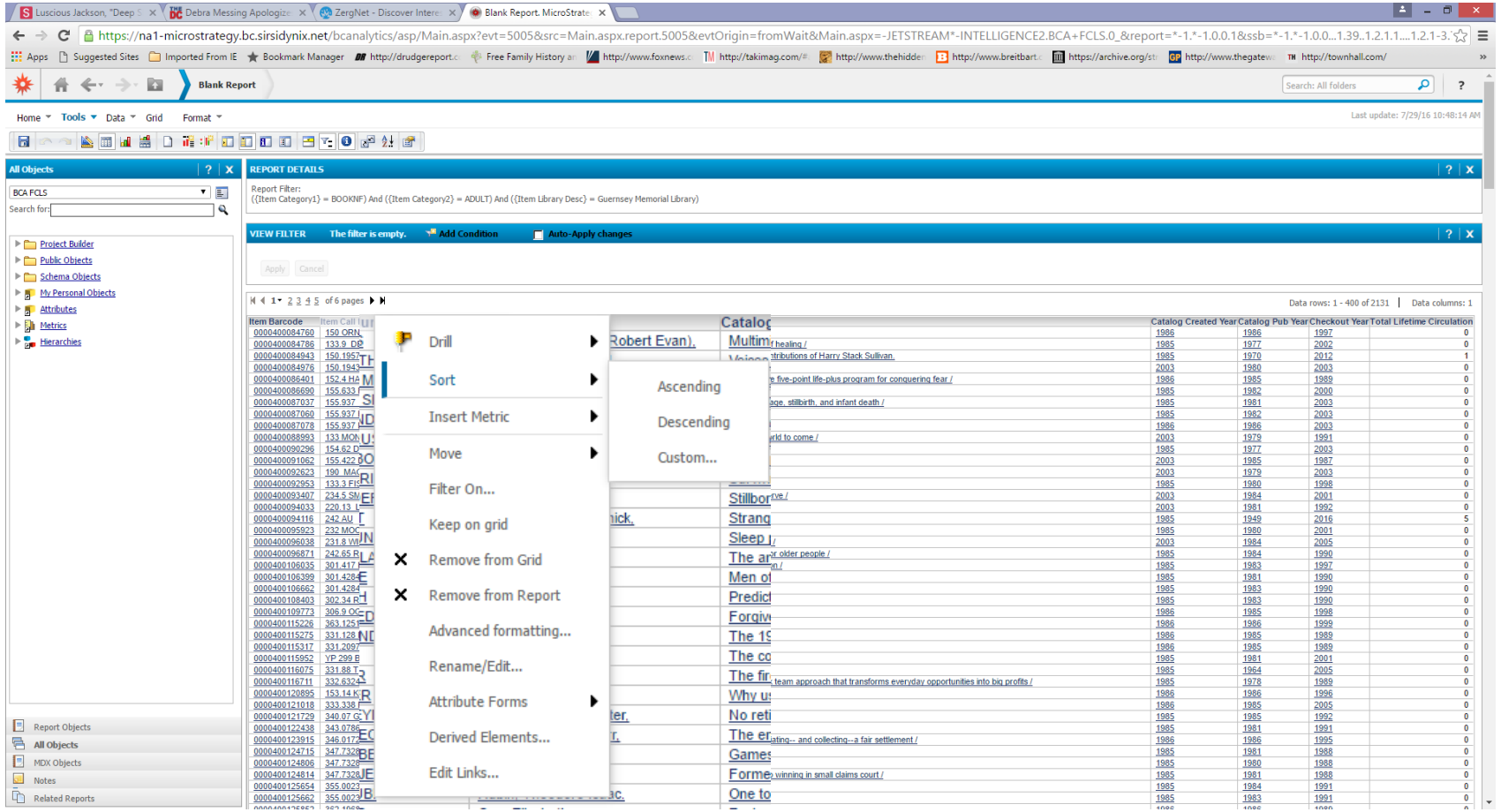
Use the icons at the top to save, email, or create graphs. Use the construction icon (A) to go back to the design stage to make any adjustments such as filtering data or adding or eliminating attributes.



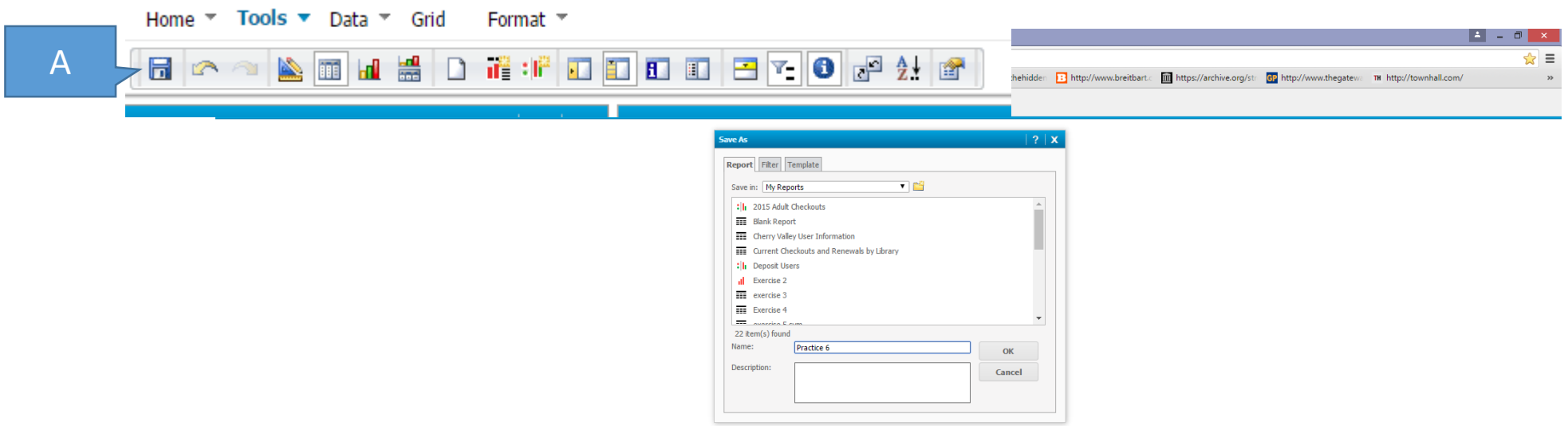
Rather than run for all Category 1 items we'll filter for BookNF. We'll also filter for Adult in Category 2. Click on the run report icon (A) to rerun.



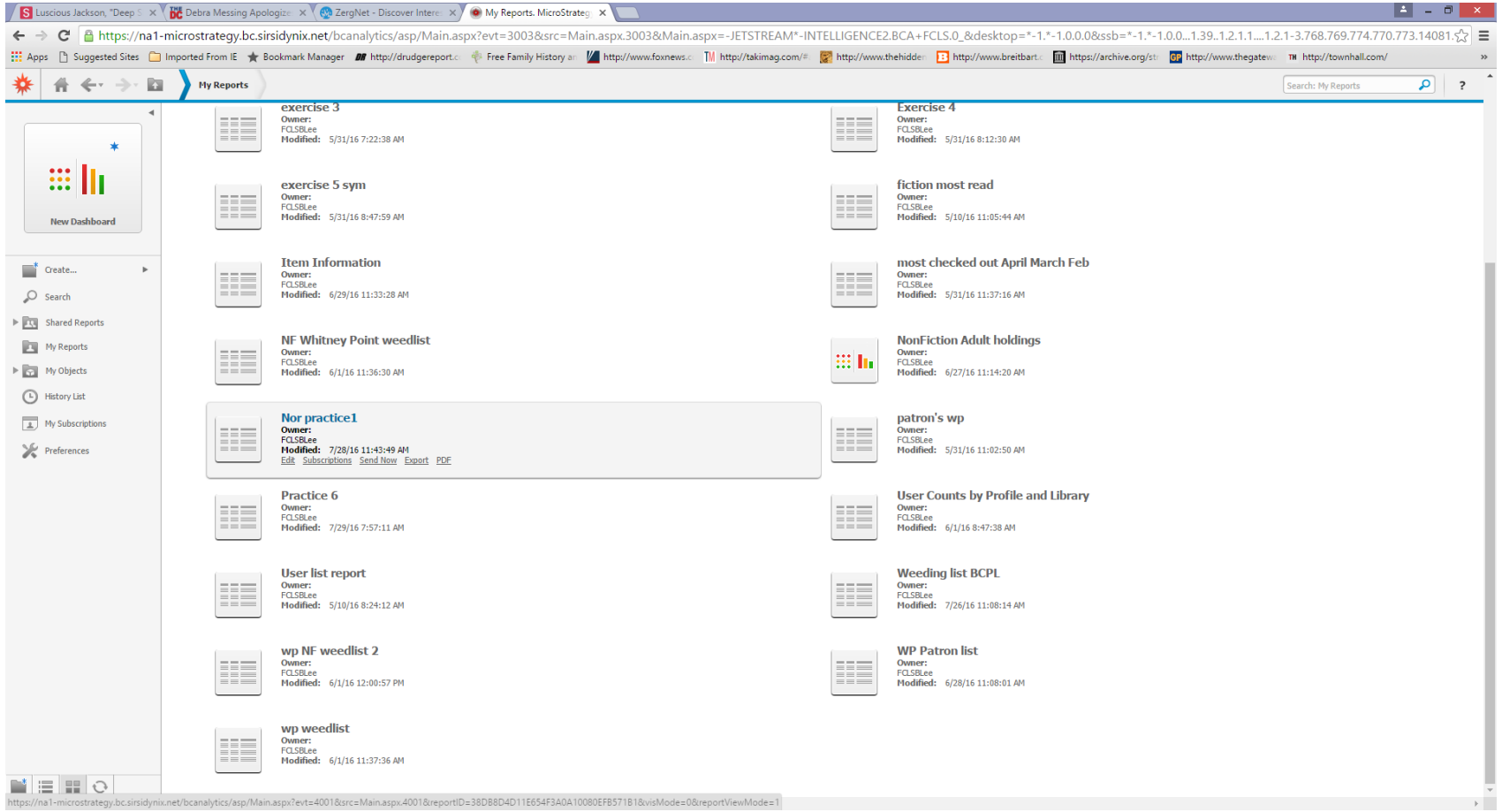
The user can change the report by right clicking on any heading, a pop up menu will appear allowing you to drill, sort, move the location, filter, remove from the grid or the report, and more.



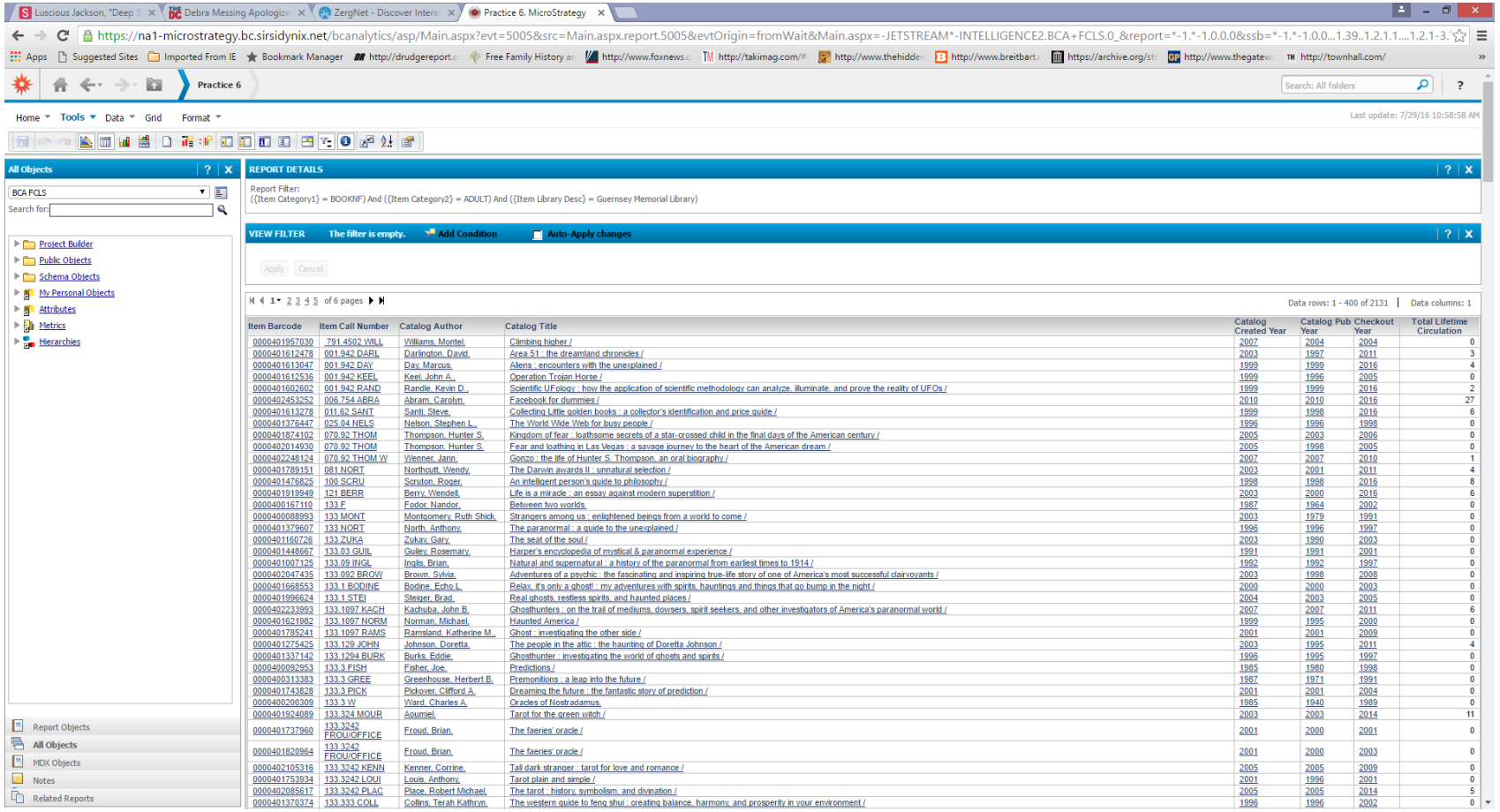
To save click on the disk icon (A) and choose My Reports.



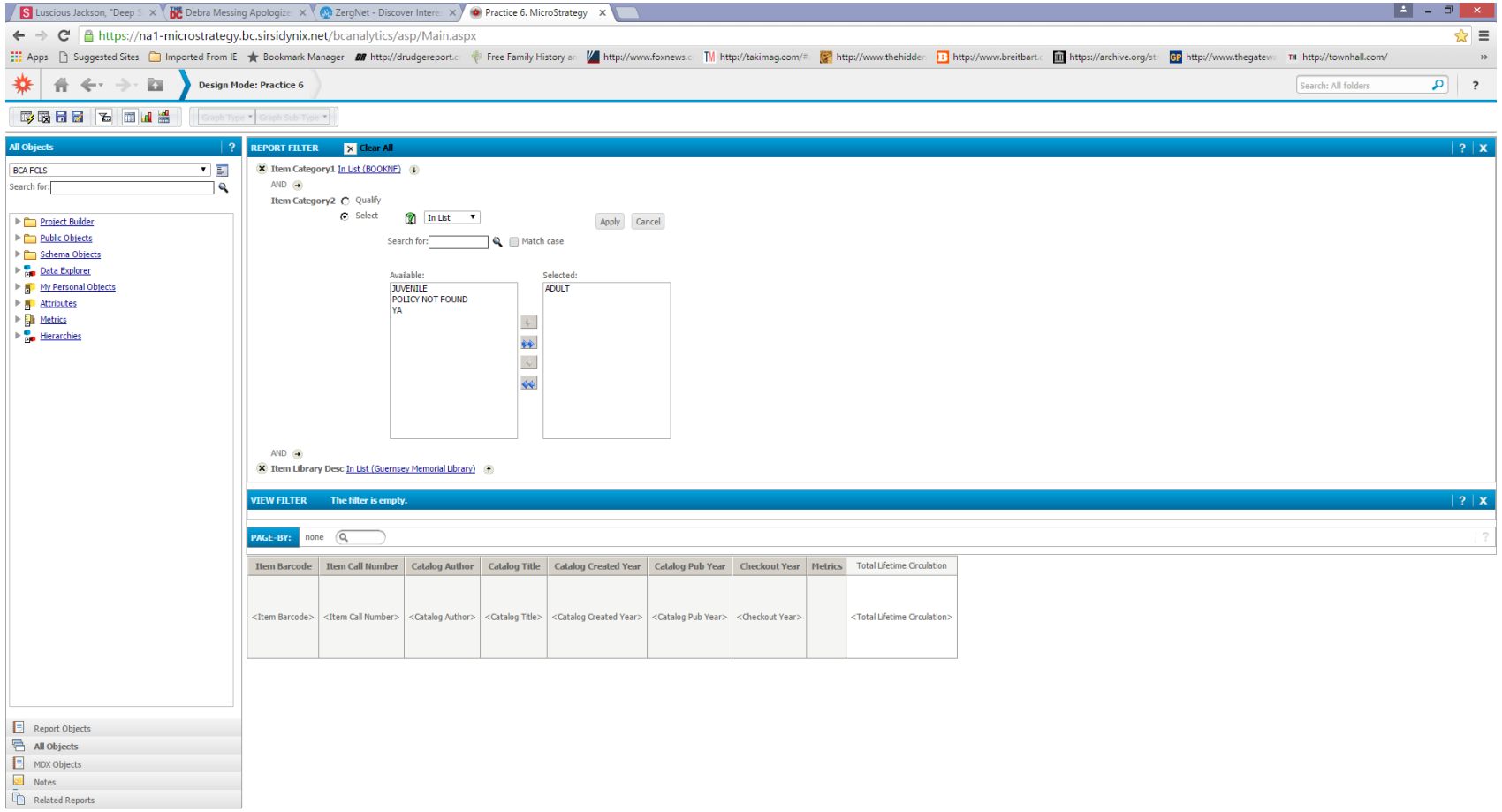
Next time go to My Reports from the main menu and click on the report.



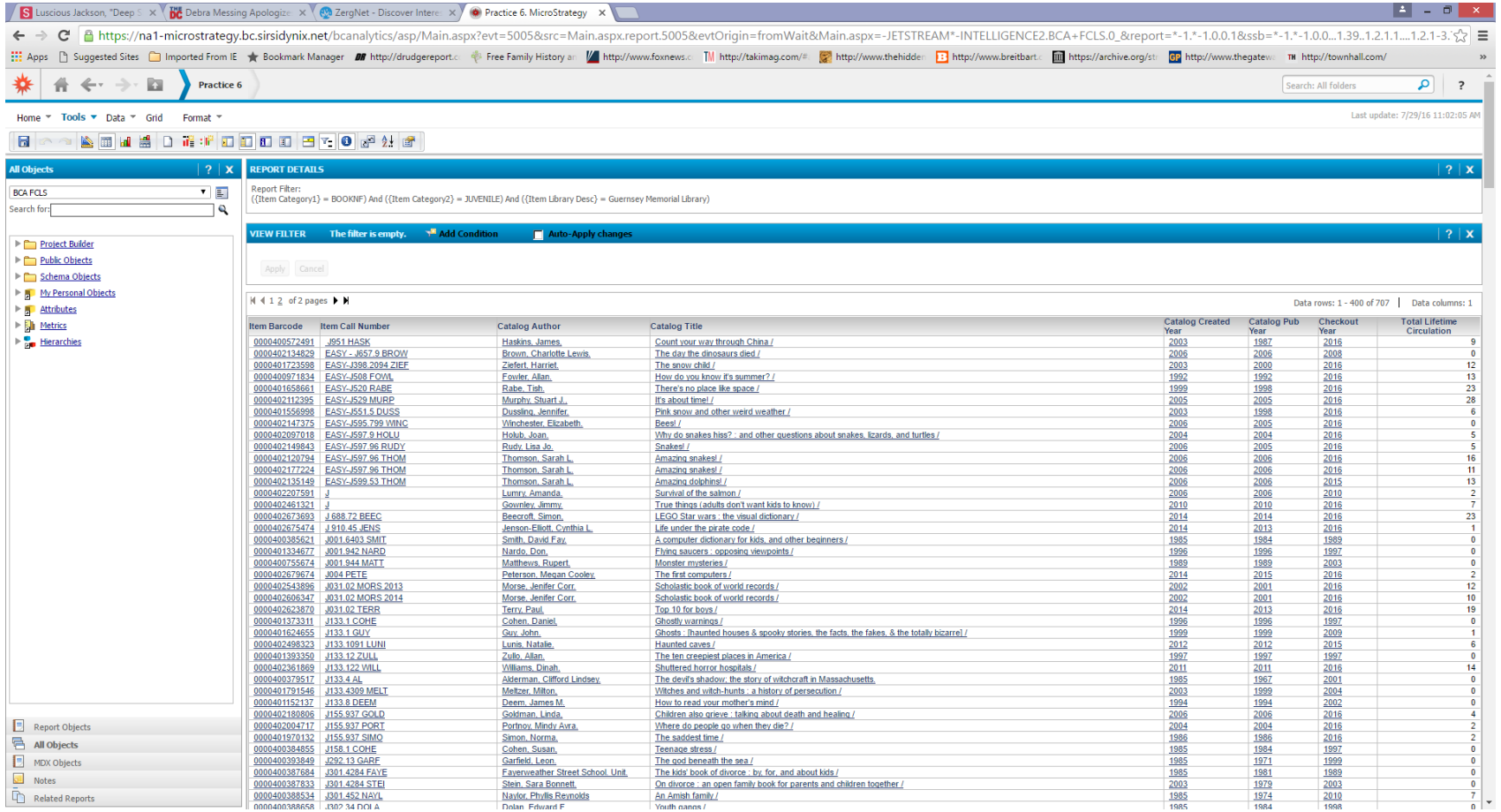
The report will be updated to that time, to change the report click on the construction icon. This will allow you to add new Attributes, Metrics, or change the Filters.



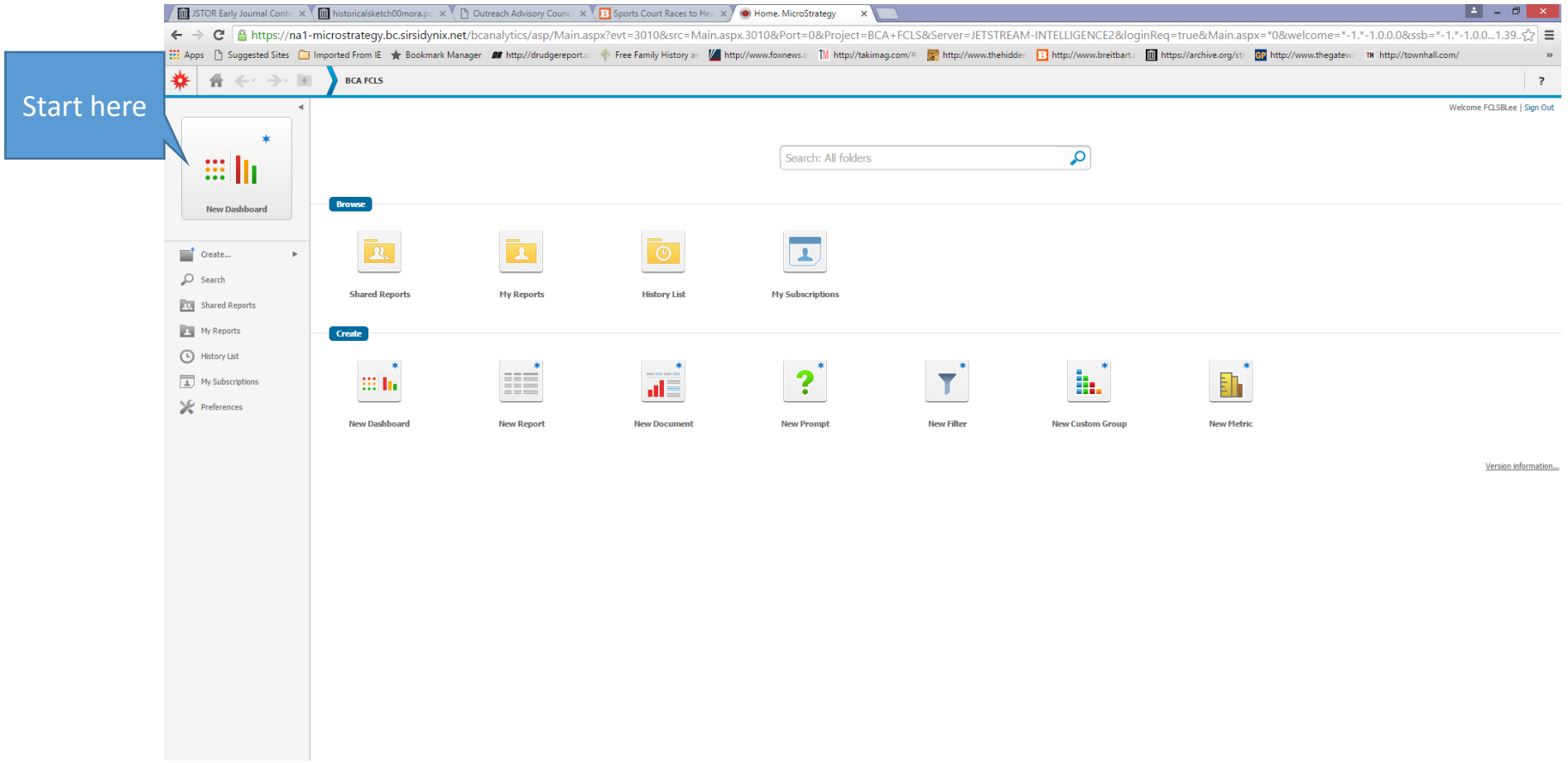
In this case we'll change from adult non-fiction to juvenile.



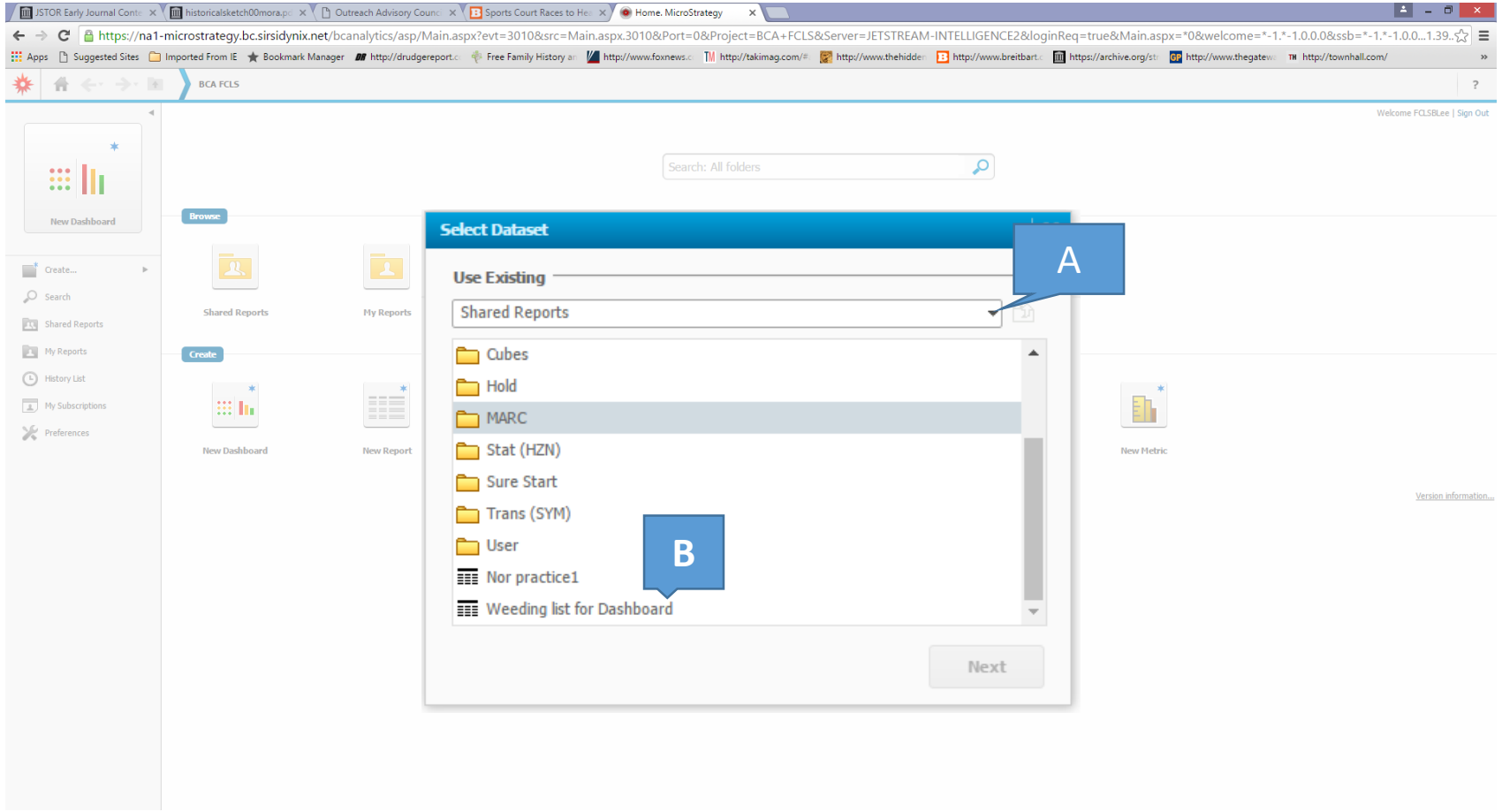
Because we saved the report we can use this basic report over and over again with different Category 1's and 2's.



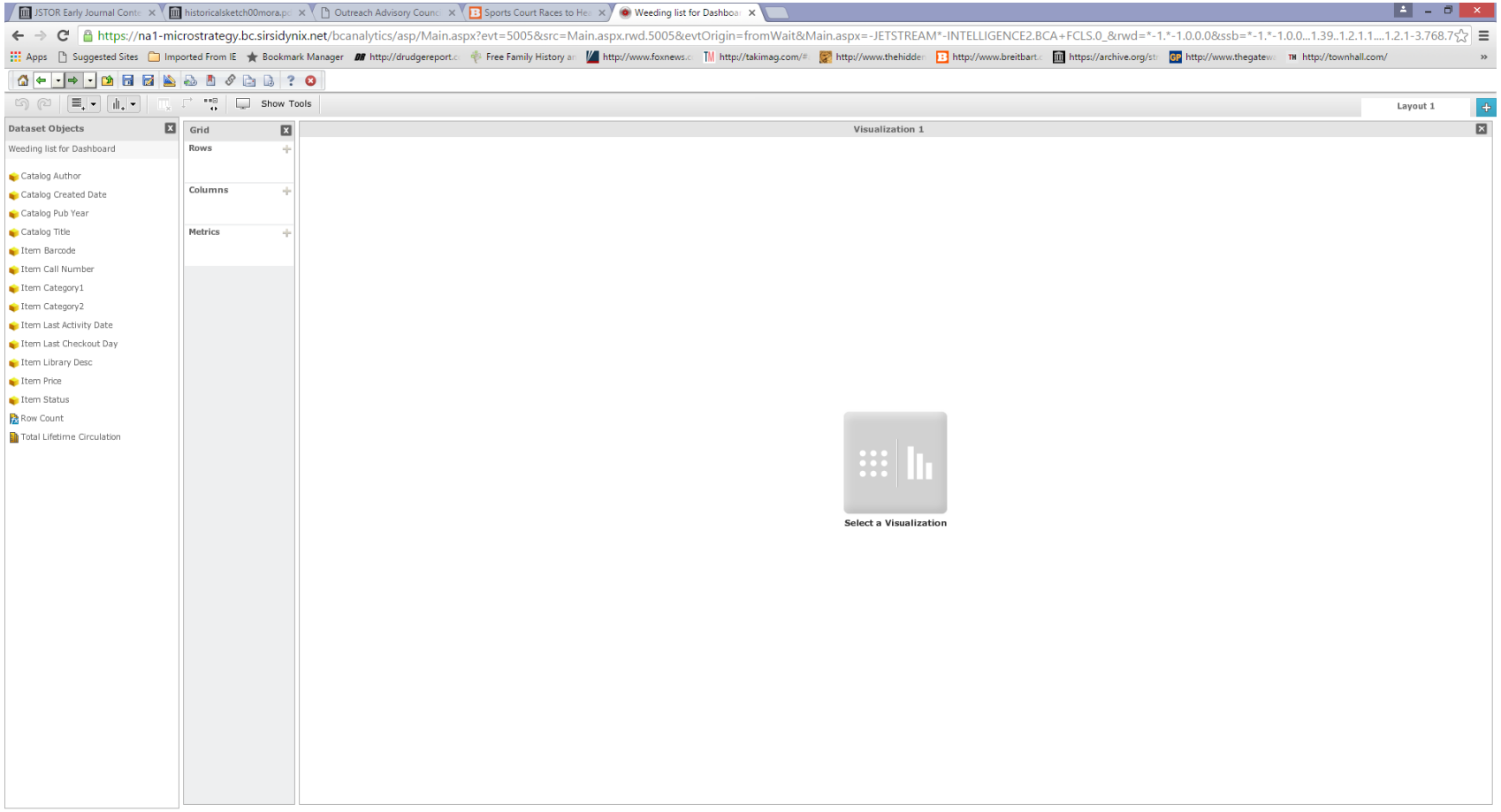
Running a Dashboard from a shared report. BLUECloud Analytics allows all users to view reports as well as run Dashboards to pull data from those same shared reports.



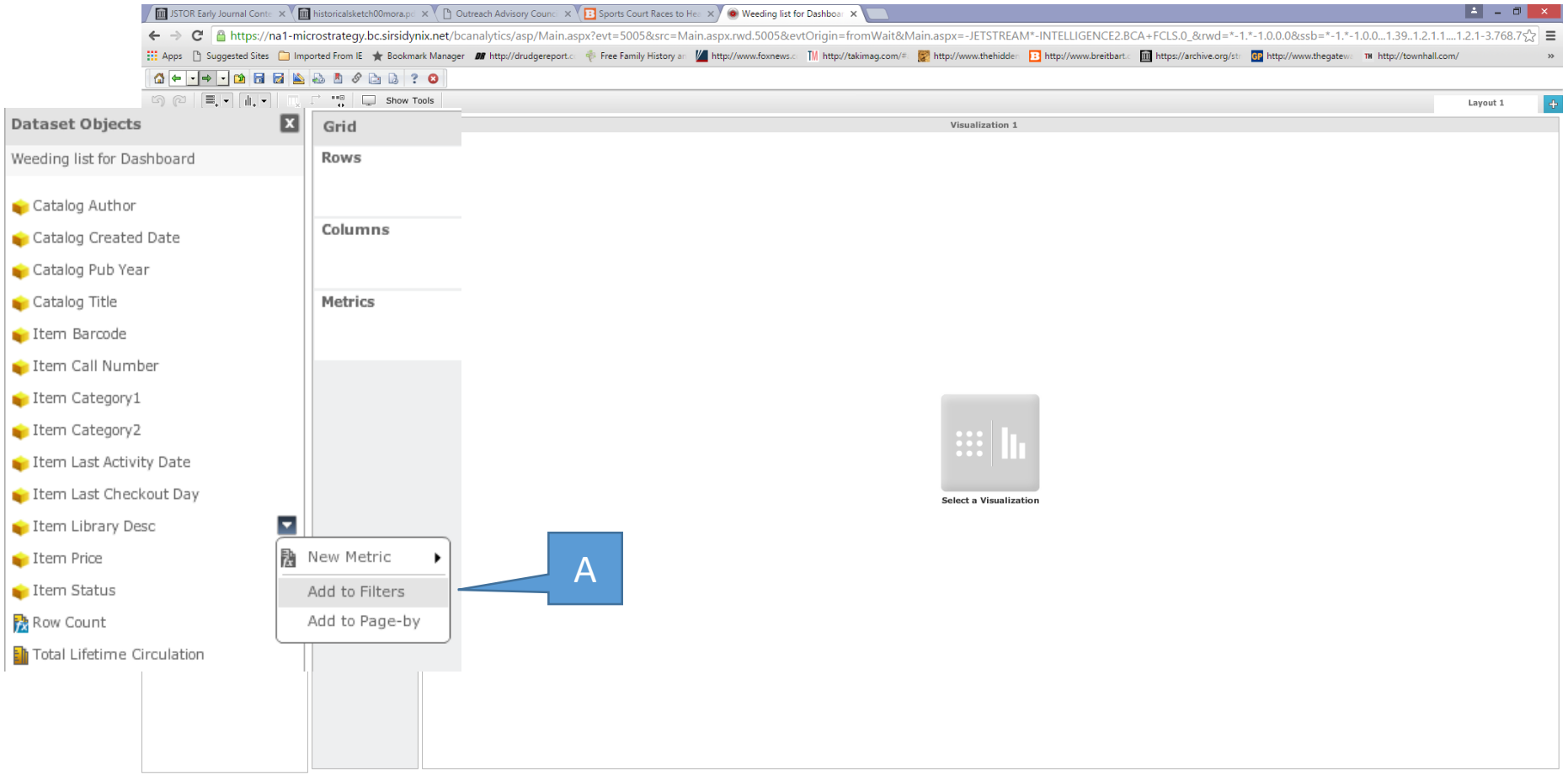
After choosing New Dashboard BLUECloud (BC) will prompt the user to pick from several folders and reports. The drop down menu (A) will allow you to use your own reports or shared ones. In this example we'll click on Weeding list for Dashboard (B).



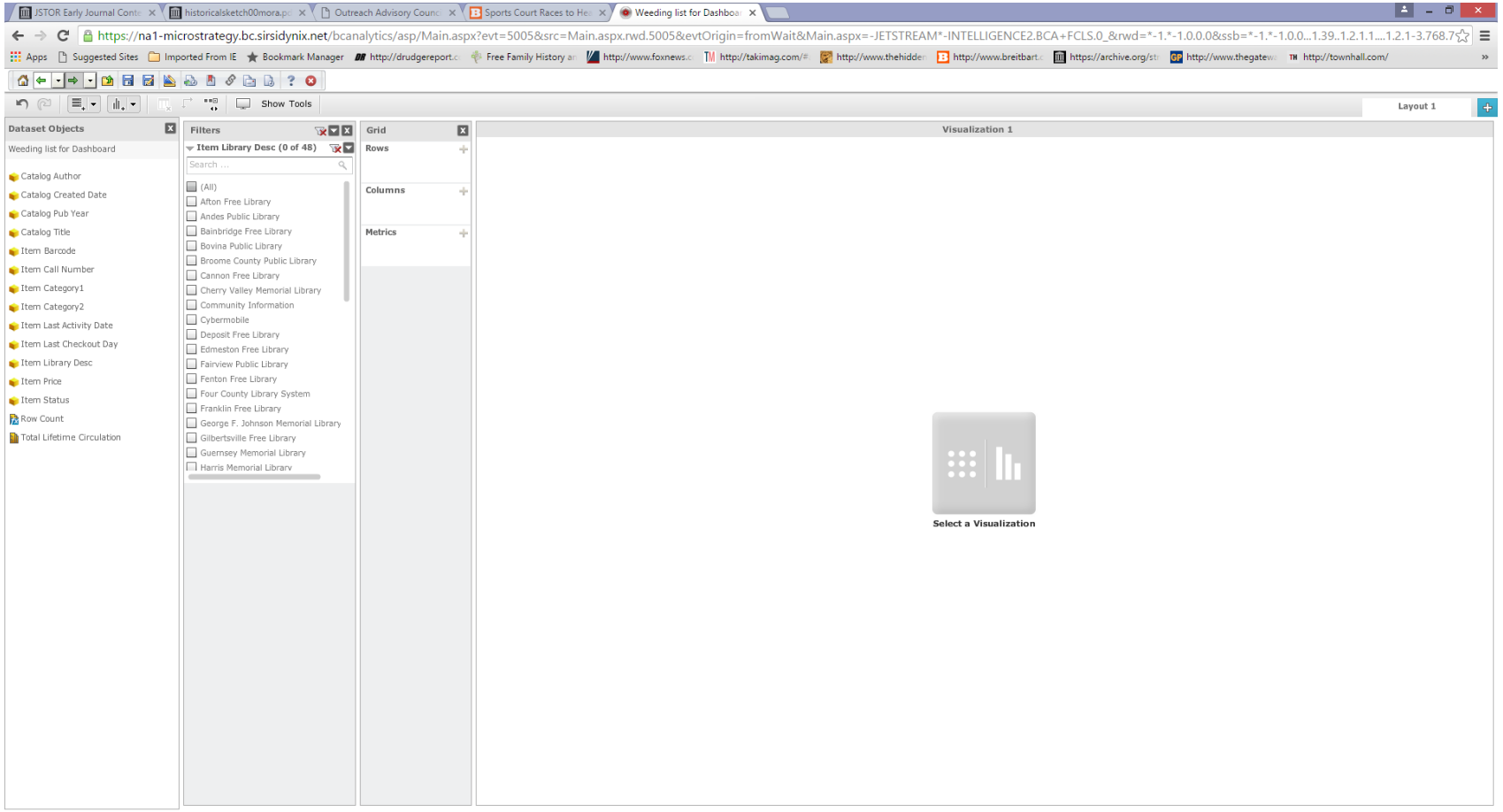
The interface is below. As with the report we compiled earlier the user will have to think in terms of what attributes he or she wants in the report and what attributes they want to filter.



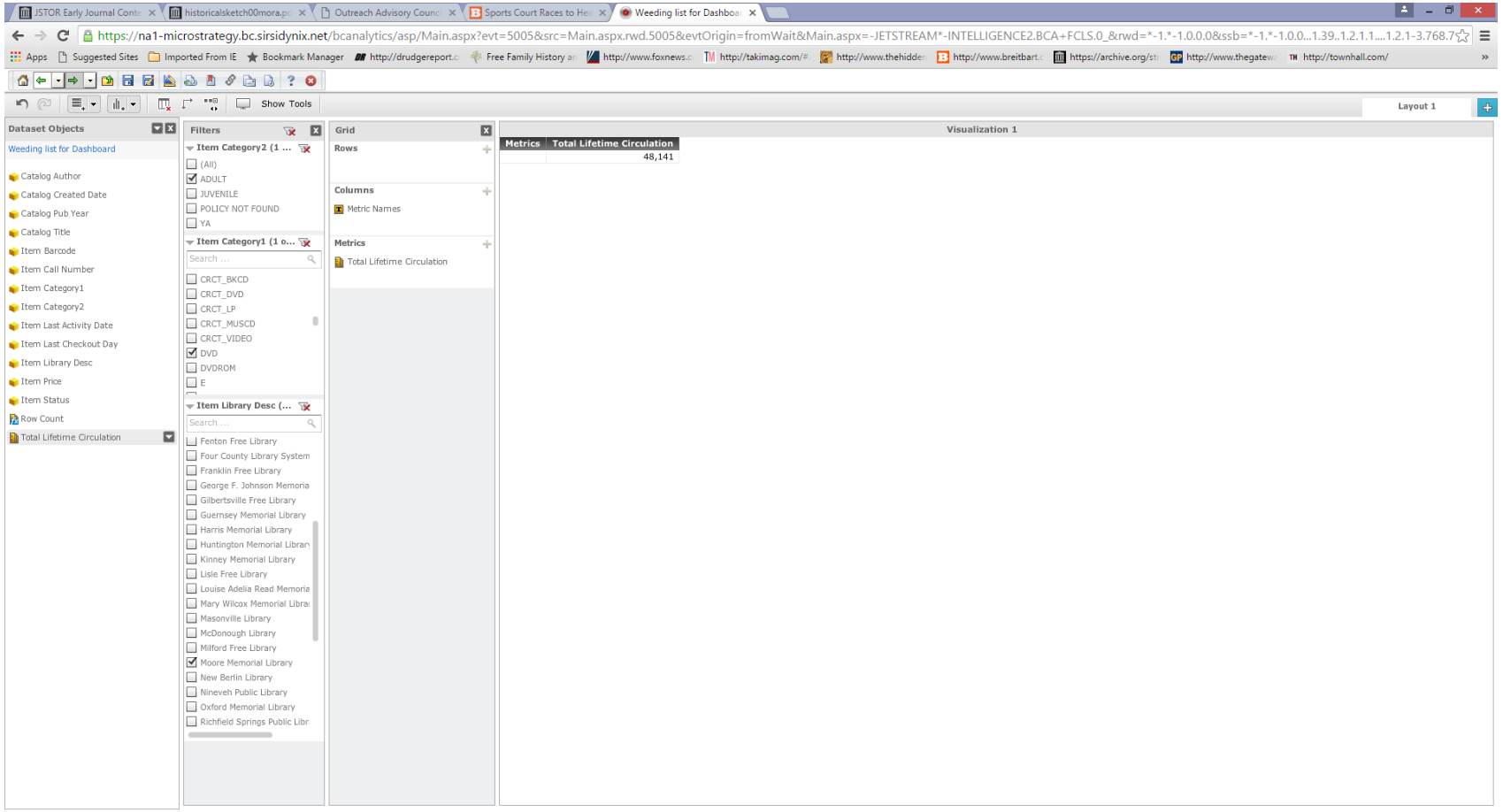
In this case we are going to look at adult DVDs. Start with the filters. Category 1, Category 2, and Item Library. Hold the curser over the Dataset Object in question, click on the downward arrow, then the Add to Filters (A).



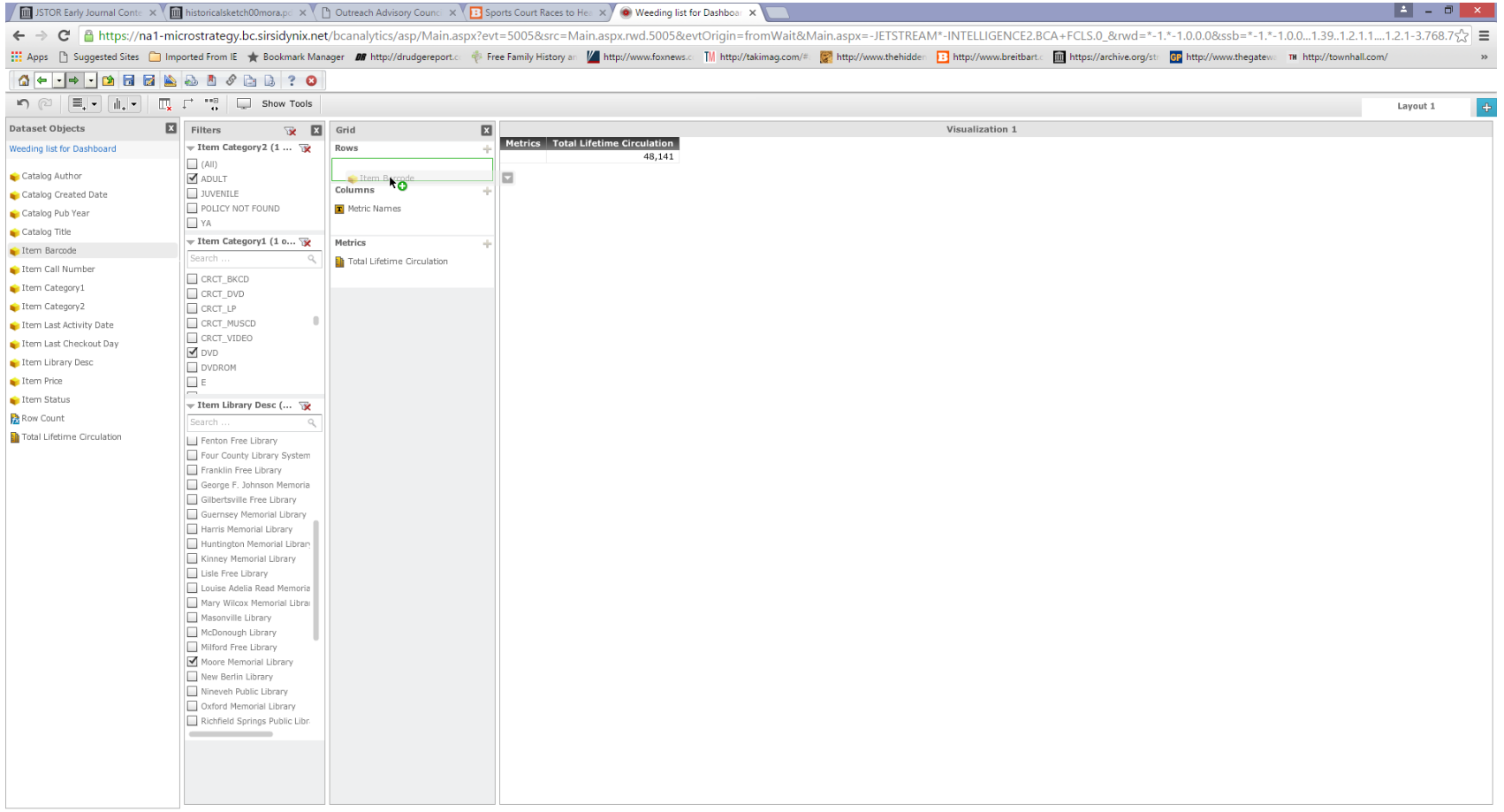
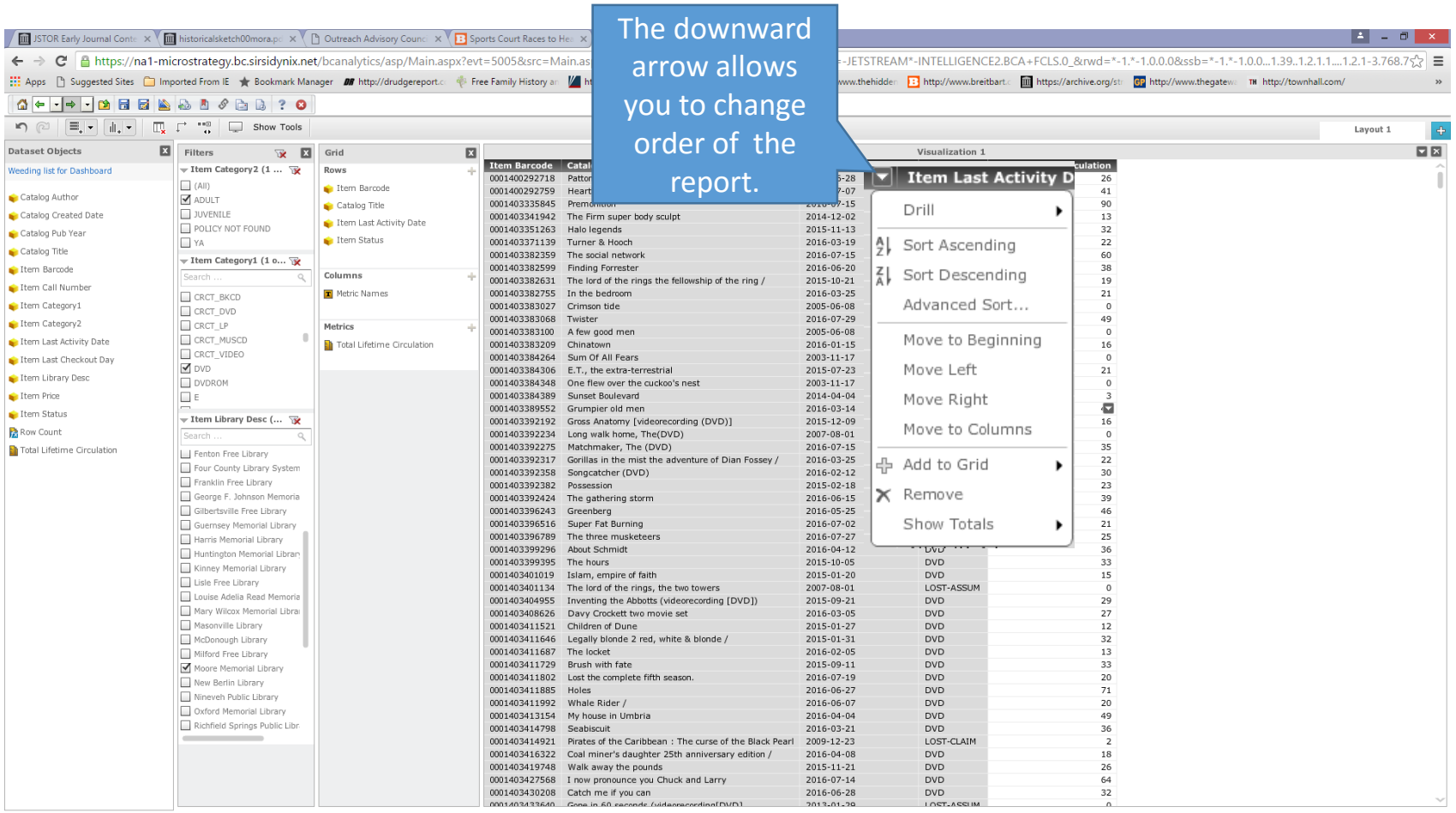
This will move the Dataset Object to the Filter, click off All and choose the desired library. Do the same for Category 1 and Category 2, picking DVD and Adult respectively.



Next we'll add the Total Lifetime Circulation to the Metrics area so we have the total number of checkouts for each item.



Now we'll add Dataset Objects to the report body. We've added the data to the report so the user can pick which dataset to add to the dashboard.



In this dashboard we've added Item Barcode, Catalog Title, Item Last Activity Date, Item Status, and our metric is Total Lifetime Circulation. The user can quickly change the data by changing the filters. Unfortunately, Dashboards cannot be converted to Excel Spreadsheets, however, they can be saved, emailed, and converted to PDFs.