Analytics Actions

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This guide provides an overview of all of the actions you can take in Bluecore's reports. By learning these actions, you can streamline your reporting processes and extract what you need from your data.

- Refine your data by filtering down to exactly what you need.
- Download and save reports to your device in CSV or PDF for offline analysis and sharing.
- Automate report delivery to specific recipients on a regular basis.
- Ensure the reports display data in a time zone you're used to working in.
- Expand individual tiles to see more details.

Filter the analytics

All of the analytics views can be filtered to hone down on the information that you need.

> ⓘ Not all filters are available for all analytics pages. The available filter options are outlined in each analytics article.

Once you've added filters, the refresh button displays with a blue circle. Click the reload button to update the tiles with the new filter criteria.

Download the report

All the data on the page can be downloaded to your device. If you only want to download one tile's date, see download individual tiles.

To download the report, complete the following:

1. Click **Menu** > **Download**. The download dialog box displays.
2. In the Format dropdown, select either CSV or PDF.
3. If you select PDF, choose the following to customize your download:
    a. Paper Size
        i. Choose the paper size. The PDF will size to match the dashboard layout.
    b. Expand tables to show all rows
        i. If disabled, the tables only show the amount of rows that display on the analytics page without scrolling. If enabled, the tables expand to display all rows, including those that you must scroll to see on the analytics page.
    c. Arrange dashboard tiles in a single file
        i. If disabled, the tiles render like on the analytics page. If enabled, the tiles display one on top of the other.

    d. Open in Browser
        i. Click to view the PDF rendering in your browser instead of downloading it to your device.

4. When finished, click **Download**. The file downloads to your device.

Schedule delivery

Scheduling a delivery automatically generates and sends an email with the report to selected participants.

You can receive the report data in a zipped CSV file, PDF, or PNG visualization.

1. Click **Menu** > **Schedule delivery**. The Schedule Delivery dialog appears.
2. Compelte the **Settings**, **Filters**, and **Advanced** tabs to customize the recurrence, recipient emails, report type, and report filters.
3. When finished, click **Save**.

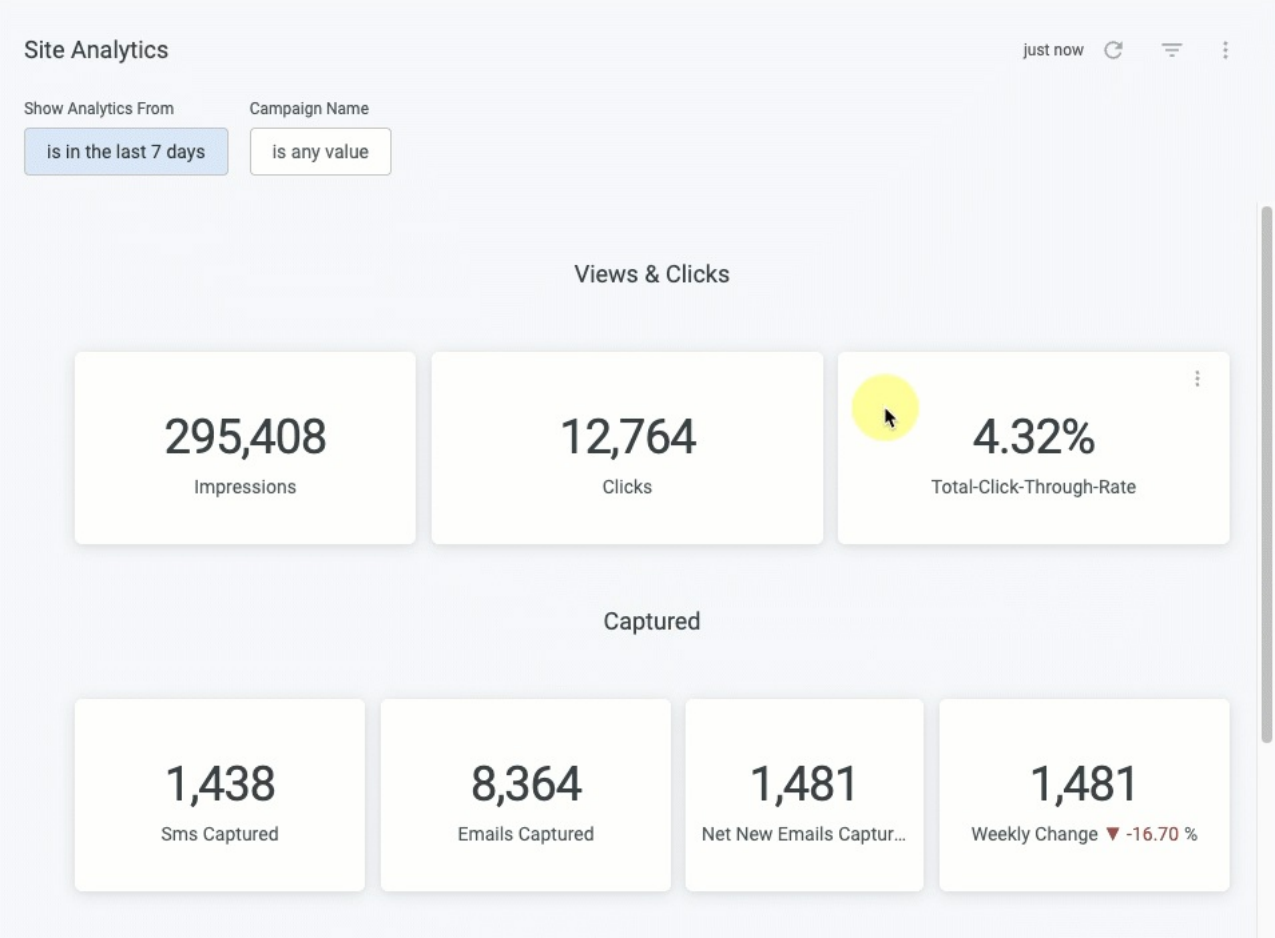
Update the time zone

Unless otherwise specified, each report displays by default in UTC, but you can update each dashboard to display in a different time zone if needed.

To update the time zone, complete the following:

1. Click the three-dot menu > **Each tile's time zone**. The dashboard time zone dialog box displays.
2. In the list, select the time zone you want to use.
3. When finished, click **Update**. The report is refreshed using the time zone.

> Each time you access the report, you will need to update the time zone.



Download individual tiles

If you only want to see data on one individual tile, you can download that tile's information instead of downloading the entire report. If you want to download all of the data, see download the report for instructions.

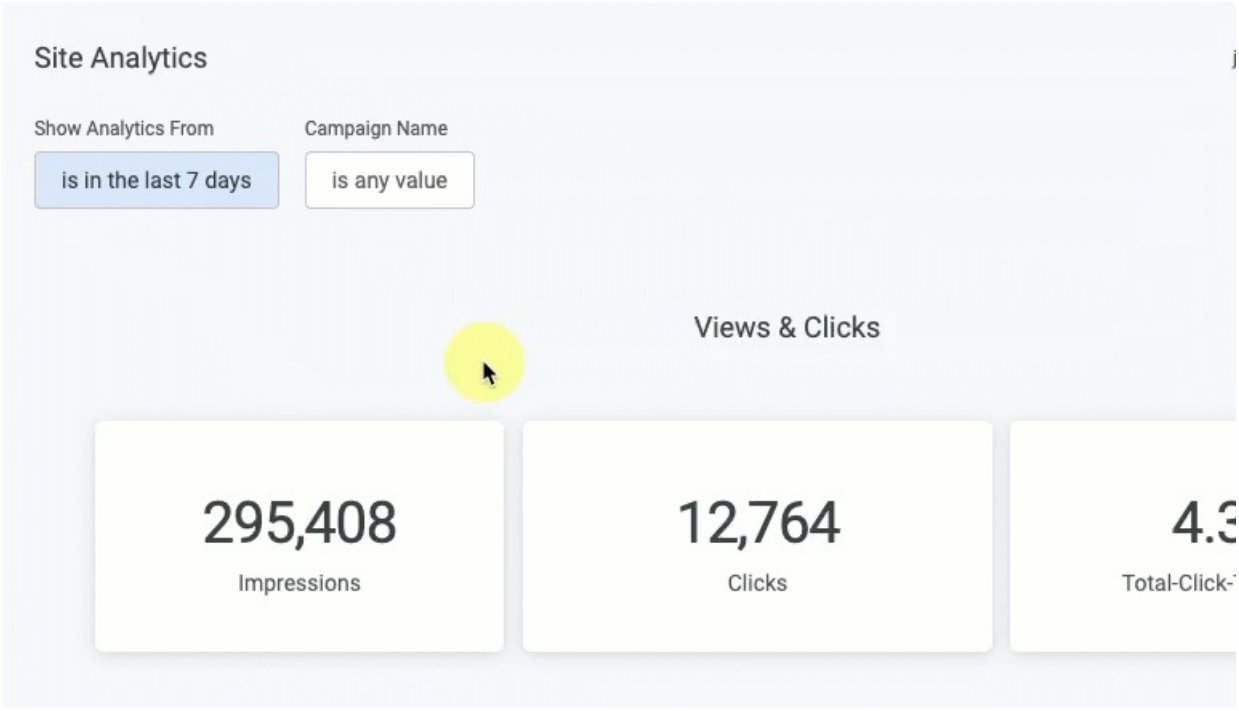
To download an individual tile's date, complete the following:

1. Hover over the tile you want to download. The**Menu** button displays.
2. Click **Menu** > **Download data**. The download dialog box displays.
3. In the Format dropdown, select the format you want from the list.
4. At this time, you can select**Download** and the file will download to your device. If you want more data options, you can select **Advanced data options** and additional options appear:
    a. Choose the results
        i. With visualizations options applied
            i. The CSV files display with formatting that Bluecore has applied.
        ii. As displayed in the table data
            i. The CSV files display without formatting, as they display in the tables.
        iii. Data values

i. Formatted
    i. Files display with additional formatting for easier human readability.
ii. Unformatted
    i. Files display without additional formatting

b. If you select PDF, choose the following to customize your download:
    i. Number of rows to include
        i. Current result table.
        ii. If enabled, the rows you can see in the table download.
    ii. Custom
        i. If enabled, this may download additional table rows that aren't shown.
        ii. Defaults to 5000.

5. When finished, click **Download**. The file downloads to your device.



Expand individual tiles

Certain tiles may be easier to view when expanded. To expand a tile, complete the following:

1. Hover over the tile you want to download. The **Menu**.
2. Click **Menu** > **View** > **Expanded**. The tile displays in a dialog box.

3. You can click the **<** or **>** to view the previous or next tiles.

4. When finished, click the **X**. The dialog box closes.

