




Exercise

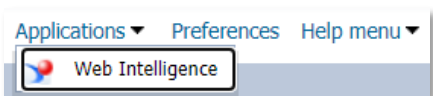



WorldShare® Reports and Report Designer Exploring the data

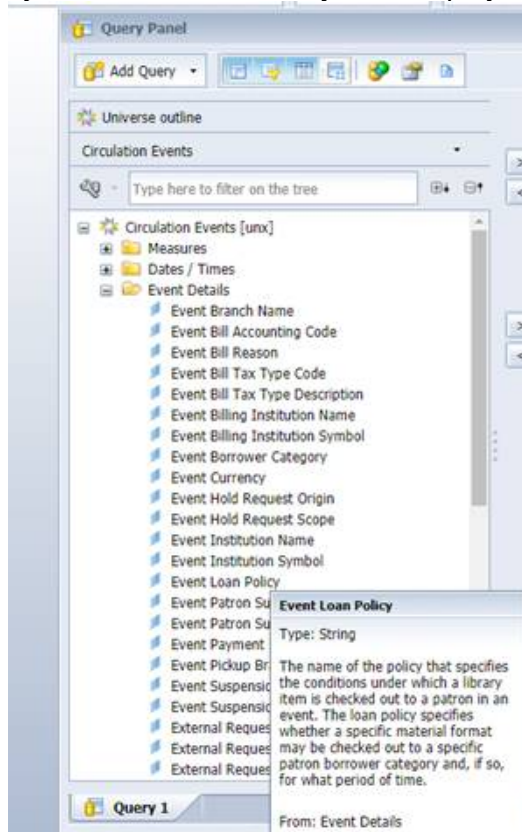
Introduction


- In WMS, some functionality traditionally thought of as reports is built into the staff interface. In Acquisitions, for example, you can view funds in a budget, including budgeted, encumbered, and expended amounts, and export this data.
- WorldShare® Reports provides more than 50 standard, pre-defined reports. To use these reports, you need only respond to prompts (such as starting and ending dates). Many reports also have optional pre-defined filters, such as material format or branch name.
- WorldShare® Report Designer has more than 1000 data elements you can use to create custom reports. These data elements are organized into several universes. In this exercise you can use the Report Designer interface to explore the universes and the objects within them, but you will not actually create any reports.
- A **universe** is a set of data related to a subject area or domain, such as acquisitions or cataloging or patrons.
- You create a report using objects. You can use objects as **result objects** (the data elements you want to include in a report, such as material format or number of holds placed), or **query filters** (the criteria you want to use to select data to be included in the report.). There are two kinds of objects: dimensions and measures.
 - A **dimension** is a perspective from which you can view or analyze data.
 - Dimensions categorize or group data.
 - Some examples of dimensions are year, material format, branch name, and shelving location. You can count dimensions (for example, the number of material formats), but you can't do calculations such as sums or averages.
 - In Report Designer, dimensions are represented by a blue icon. 
 - A **measure** is numeric data about a dimension.
 - An example of a measure is number of items checked out or checked in.
 - You can do calculations on measures, for example, you could calculate the average number of items checked out each month.
 - In Report Designer, measures are represented by a yellow ruler icon. 
- A **class** is an organization of objects into logical groups. In Report Designer, a class is represented by a file folder icon. 

Instructions

- Some exercises ask about standard reports. Documentation is at https://help.oclc.org/Library_Management/WorldShare_Reports/Available_standard_reports. You can also explore standard reports by signing in using the information below. From the **Analytics** tab, expand the **Reports** accordion in the left navigation and select **Reports**. Expand a report category, then select a specific report.
- Some exercises ask about report objects. You can complete these exercises either by consulting documentation for “Report objects by universe” at https://help.oclc.org/Library_Management/WorldShare_Reports/Report_objects/Report_objects_by_Universe, or by signing in to WorldShare Report Designer.
- To sign in to Reports and Report Designer:
 - In your browser, enter the WorldShare URL for your library. Your library's WorldShare URL will have the following format: `https://yourlibrary.share.worldcat.org/wms`. Replace `yourlibrary` with your library's identifier.
 - On the Sign in screen, enter your User Name and Password.
 - Click **Sign In**.
 - Depending on the roles associated with your User Name, you may not have access to some of the reports and universes listed in the exercises.
- To explore objects in a universe:
 1. Click the **Analytics** tab.
 2. In the left navigation, click **Reports** to expand it.
 3. Click **Report Launch Pad**. A new tab or window will open in your web browser.
 4. In the new tab or window, click **Applications > Web Intelligence**.A screenshot of a web application's navigation menu. At the top, there are three items: 'Applications' with a downward arrow, 'Preferences', and 'Help menu' with a downward arrow. Below 'Applications', a dropdown menu is open, showing a red and blue icon followed by the text 'Web Intelligence'. The dropdown menu has a light blue background and a thin border.
 5. Click the **New** button in the upper left of the screen. A small blue square icon with a white document symbol inside, representing a 'New' button.
 6. In the Create a document dialog, click **Universe**, then click **OK**.
 7. Select a universe and click **OK**.

8. Answer the questions in each exercise by exploring the universe:
 - a. Click + to expand a class and display the objects in the class.
 - b. Hover your mouse over an object to display a description of that object.



9. Compare your answers to the answers provided at the end of the exercises.
10. When you have finished answering the questions in an exercise, close the Query Panel by clicking  in the upper right of the Query Panel.
11. Repeat steps 5-10 as needed.

Exercise 1 – Acquisitions

1. You need information on the status of your current acquisitions budget, by fund: amounts encumbered and expended and remaining balance. Would you:
 - a. Use a standard report? If so, which one?
 - b. Create a custom report? If so, which objects would you include?
 - c. Find the information on the Acquisitions tab? If so, what steps would you follow?

Exercise 2 – Cataloging

In the Cataloging universe, reports can include objects from only **one** of these three classes:

- Title Holdings class – High-level monthly snapshot of counts of title holdings
- Item Holdings class – High-level monthly snapshot of counts of item holdings
- Volatility information – Daily titles (not items) added or removed from the institution's collection

Objects from one of these three classes can be combined with objects from any of the other classes (Date, Institution, and Report Objects).

1. You want a count of the number of titles added to your collection since July 1, 2019. You want the report to include local call number range, material format, and language. Would you:
 - a. Use a standard report? If so, which one?
 - b. Create a custom report? If so, which objects would you include?
 - c. Find the information on the Metadata tab? If so, what steps would you follow?

2. What is the source of information for these objects?:
 - Place of Publication
 - Publication Place Code

Exercise 3 – Circulation Events

In the Event Details class, **Event Branch Name** is the branch where an event such as check out or check in occurred. In the Event Item class, **Item Branch Name** is the branch that owns the item; this may be different than the Event Branch Name.

1. You want a report for the current calendar year that will give you a count by borrower category of holds placed, cancelled, fulfilled, and picked up. You want to be able to see subtotals for each month since the beginning of this calendar year. What objects from the circulation events universe should you consider including in a custom report?

2. What is the difference between these two objects in the Event Dates subclass of the Dates/Times class?
 - Event Month Name
 - Event Month of Year

Exercise 4 – Circulation Fiscal Transactions

1. You need a report, by staff member name, listing amounts and reasons for each bill cancelled, refunded, and waived in the last 6 months. You want the report to include the date of each transaction, as well as the action type (cancelled, refunded, or waived), and the bill reason (e.g., overdue, lost item). What objects from the circulation fiscal transactions universe should you consider including in a custom report?
2. In the Fiscal Transaction Item class, what is the difference between these three objects?
 - Item Branch Name
 - Item Holding Location
 - Item Permanent Shelving Location

Exercise 5 – Circulation Hold Requests

What is the difference between these three standard reports? (*Hint: Look in Help*).

- Holds List Report
- Holds Ready for Pickup Report
- Open Holds Report

Exercise 6 – Circulation Item Status

The Circulation Item Status universe contains information about the current status of all barcoded items in WMS. This includes data about the item and patron data that might be associated with the item. The information in this universe is a snapshot of current item status. It should not be used for analysis of historical item activity.

1. What is the purpose of these objects?
 - Item Last Seen Date
 - Item Soft Issued Count
2. You want a report listing items that are currently In Processing. You want the report to include this information about each item: branch, permanent shelving location, material format, call number, title, and barcode. What objects from the Circulation Item Status universe should you consider including in a custom report?

Exercise 7 – Circulation Patron Information

1. Your library uses “Patron Custom Category 1” to track certain information about your patrons. You need a report listing patrons with specific values in this field, who have account expiration dates between now and the end of next semester. The report needs to include patron name, barcode, and email address, as well as the custom category 1 and the expiration date. What objects from the Circulation Patron Information universe should you consider including in a custom report?

Exercise 8 – Circulation Scheduled Items

1. You want a report of items scheduled to be picked up within a specific range of dates. You want the report to include the pickup date, any schedule notes, the item branch, permanent and temporary shelving location, barcode, call number, and title; and patron barcode, name, and email address. What objects from the Circulation Scheduled Items universe should you consider including in a custom report?

Exercise 9 – E-Resources COUNTER 5

1. Which objects in the E-Resources COUNTER 5 universe count searches where the end user controls which databases are searched?
2. Which objects in the E-Resources COUNTER 5 universe count searches where the end user does not select which databases are searched?

Exercise 10 – Institution Title Holdings

1. The Cataloging Language Name object is based on which field in MARC bibliographic records?
2. The Place of Publication dimension is based on which field in MARC bibliographic records?

Exercise 11 – LHR Item Detail

1. What is the source for the LHR Item Call Number object?
2. If your library has coded certain Local Holdings Records for an interlibrary loan policy of “Will not lend” or “Will not reproduce” when applicable, what objects from the LHR Item Detail universe would allow you to include this information in a report?

Exercise 12 – Overlap

Hint: Look in Help.

1. What is the difference between the “WorldCat knowledge base - Collection Overlap Summary Report” and the “WorldCat knowledge base – My Collection Overlap Summary Report”?
2. The “WorldCat knowledge base – Collection Overlap Detail Report” is an available standard report according to the Help, but it is not listed among E-resource reports. How would you launch this report?
3. If a title in knowledge base collections you are comparing doesn't have an OCLC number, will it be included in overlap reports?

Answers

Exercise 1 – Acquisitions

1. There is no need to create a custom report.

The pre-defined **Fund Balance** report has this information. To run this report, from the **Analytics** tab, expand the **Reports** accordion in the left navigation and select **Reports**. Expand **Acquisitions**, then click **Fund Balance**.

You can also find this information on the Acquisitions tab.

- Click **Budget**.
- Select a budget period and click **Edit**.
- As needed:
 - Collapse all funds or Expand all funds.
 - Select number of rows to display.
 - Configure columns to show or hide.



- Export as a CSV file by clicking .

Exercise 2 – Cataloging

1. You could create a custom report, but it is simpler to use an existing standard report, **New Titles List**. To run this report, from the **Analytics** tab, expand the **Reports** accordion in the left navigation and select **Reports**. Expand **Cataloging/Collection**, then click **New Titles List**.

If you need subtotals, for example by material format or language, you can export the report to Excel and use Excel's functions to sort the data and calculate subtotals. Alternatively, you could put the report into Design mode and apply sorting and calculations within Report Designer.

2. (found by hovering mouse over each object in the Volatility Information class, or by consulting Help)
 - Place of publication: 260 or 264 field in MARC bibliographic record
 - Publication Place Code: 008/15-17 (fixed field Ctry) in MARC bibliographic record

Exercise 3 – Circulation Events

1. Objects to include:
 - From the Measures class:
 - Holds Cancelled
 - Holds Fulfilled
 - Holds Picked Up
 - Holds Placed
 - From the Dates/Time class > Event Dates subclass:
 - Event Year Month
 - Event Month Name
 - Event Year (as a query filter)
 - From the Event Patron class > Account Information subclass:
 - Patron Borrower Category
2. What is the difference between these two objects in the Event Dates subclass of the Dates/Times class?
 - Event Month Name is a string (e.g., January)
 - Event Month of Year is numeric (which facilitates sorting)

Exercise 4 – Circulation Fiscal Transactions

1. Objects to include:
 - From the Measures class:
 - Bills Waived Amount
 - Bills Cancelled Amount
 - Bills Refunded Amount
 - From the Dates/Times class > Fiscal Transaction Last Update Date subclass:
 - Fiscal Transaction Last Update Date/Time
 - From the Fiscal Transaction Details class:
 - Fiscal Action Type
 - Fiscal Bill Note
 - Fiscal Bill Reason
 - From the Fiscal Transaction Staff class:
 - Fiscal Transaction Staff Full Name
2. (found by hovering over each object in the Fiscal Transaction Item class, or by consulting Help):
Item Branch Name is the name of the branch (e.g., Science Library) that owns the item. Item Holding Location is a 4-letter code (e.g., T@WS) for a branch. Item Permanent Shelving Location is a location within a branch (e.g., Reference) where an item is shelved.

Exercise 5 – Circulation Hold Request

- The Holds List Report includes holds that currently could be fulfilled (i.e., the item that could fulfill the open hold request is in Available or In Processing status).
- The Holds Ready for Pickup report includes fulfilled hold requests; that is, items with a status of “On Hold” that are on the hold shelf ready for patrons to pick up.
- The Open Holds Report includes open hold requests that are not yet filled.

Exercise 6 – Circulation Item Status

1. (found by hovering over each object in the Dates/Times class, or by consulting Help)
 - Item Last Seen Date is the date the item was last seen by library staff. For more information, see [View statistics and reminders sent](#).
 - Item Soft Issued Count is the total number of times that the item was checked in using the non-loan return mode.
2. Objects to include:
 - From the Item class:
 - Item Barcode
 - Item Branch Name
 - Item Call Number
 - Item Material Format
 - Item Permanent Shelving Location
 - Item Title
 - From the Item Status Detail class:
 - Item Status Current Status (as a query filter, with “In Processing” selected from list of values)

Exercise 7 – Circulation Patron Information

1. Objects to include:
 - From the Personal Information class:
 - Patron Full Name
 - From the Contact Information class:
 - Patron Email Address
 - From the Account Information class:
 - Patron Barcode
 - Patron Custom Category 1
 - Patron Expiration Date (both as a result object, and a query filter)

Exercise 8 – Circulation Scheduled Items

1. Objects to include:
 - From the Dates / Time class > Schedule From Date subclass:
 - Schedule From Date/Time (as both a report object and a query filter)
 - From the Schedule Details class:
 - Schedule Note
 - From the Scheduled Item class:
 - Item Barcode
 - Item Branch Name
 - Item Call Number
 - Item Permanent Shelving Location
 - Item Temporary Shelving Location
 - Item Title
 - From the Scheduled Patron class > Personal Information subclass:
 - Patron Full Name
 - From the Scheduled Patron class > Contact Information subclass:
 - Patron Email Address

- From the Scheduled Patron class > Account Information subclass:
 - Patron Barcode

Exercise 9 – E-Resources COUNTER 5

(found by hovering over each object in the E-Resources COUNTER5 universe in Report Designer, or in Help at

https://help.oclc.org/Library_Management/WorldShare_Reports/Report_objects/Report_objects_by_Universe/E-Resources_COUNTER_5_universe)

1. Database Regular Searches
2. Database Automated Searches and Database Federated Searches

Exercise 10 – Institution Title Holdings

(found by hovering over each object in the Title class, or by consulting Help)

1. The three-character code in 040 subfield \$b, which is converted to cataloging language name as defined by the MARC Code List for Languages at https://www.loc.gov/marc/languages/language_code.html
2. 260 or 264

Exercise 11 – LHR Item Detail

(found by hovering over each object in the LHR Item Detail class, or by consulting Help)

1. The LHR Item Call Number object data comes from Local Holdings Record field 852, subfields \$k, \$h, \$i, and \$m.
2. The dimension LHR Lending Policy (in the LHR Item Detail class) is based on the 008/20 of the Local Holdings Record. The one character code in 008/20 is converted to the readable name, e.g., “Will not lend” for code b.
The dimension LHR Reproduction Policy (in the LHR Item Detail class) is based on the 008/21 of the Local Holdings Record. The one character code in 008/21 is converted to the readable name, e.g., “Will not reproduce” for code b.

Exercise 12 – Overlap

Answers found in Help at

https://help.oclc.org/Library_Management/WorldShare_Reports/Available_standard_reports/EResources_reports/WorldCat_knowledge_base_-_Collection_Overlap_Summary_Report.

1. “WorldCat knowledge base - Collection Overlap Summary Report” displays a summary of duplicate and unique titles/coverages when comparing an electronic collection to another electronic collection(s). This information is useful when making acquisition or retention decisions for electronic collections. The “WorldCat knowledge base – My Collection Overlap Summary Report” compares one of **your library's selected collections** to one or more Global collections or to one or more of your library's other selected collections.
2. To launch the “WorldCat knowledge base – Collection Overlap Detail Report,” use the drill-down links in the Content column in the “WorldCat knowledge base - Collection Overlap Summary Report.”
3. No. A title's OCLC number is used as a match point in this report. If titles in the knowledge base collections you are comparing do not have OCLC numbers, they will not be included in your overlap report.