WorldShare Reports

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WorldShare Reports allows you to monitor your institution’s activity within the WorldShare application. Plus, with WorldShare Report Designer, you can build custom reports and visualizations that meet your specific library needs.

- Get started
  - Get started with WorldShare Reports.
    - About Reports
    - About WMS group reports
    - Reports and Report Designer account roles
    - Add a privacy notice
    - Set or reset your password
    - Sign in to Reports

- Available standard reports
  - Discover the reports available to monitor your institution's activity within WorldShare.
    - Acquisitions reports
    - Cataloging/Collection reports
    - Circulation reports
    - E-Resources reports
    - Interlibrary Loan reports
    - Metadata reports
    - Select a report

- View reports
  - Standard and custom reports appear in a report viewer. The report viewer allows you to perform actions such as saving, exporting, and refreshing data in a report.
    - View a custom report
    - View a standard report
• **Work with reports**

  Discover procedures for tasks that you may perform (e.g., create, export, schedule, etc.) as you work with standard and custom reports.

  ◦ Run reports
  ◦ Prompt variants
  ◦ Relative dates
  ◦ Filter reports
  ◦ Modify reports
  ◦ Report variables
  ◦ Save reports
  ◦ Schedule reports
  ◦ Print reports
  ◦ Export reports

• **Report objects**

  Report objects are used to build custom report queries and to retrieve data for custom and standard reports.

  ◦ Available report objects
  ◦ Report objects A-Z
  ◦ Report objects by Universe

• **WorldShare Report Designer**

  WorldShare Report Designer allows you to build custom reports, charts, and data visualizations to satisfy library, academic, and agency reporting requirements.

  ◦ About Report Designer
  ◦ Create a custom report
  ◦ Create a multiple universe report
  ◦ Query operators
  ◦ Shared report templates
  ◦ Universes

• **Reference**

  Additional resources for WorldShare Reports
Available reports for WMS users
- Disassociate patron data from circulation events
- Retrieve WMS data extract files with SFTP

- WorldShare Reports release notes and known issues
  
  No image available

  Find WorldShare Reports release notes and known issues. Release notes are documents that contain information about new product features and enhancements as installed in scheduled releases.

  - 2021 WorldShare Reports release notes
  - 2020 WorldShare Reports release notes
  - 2019 WorldShare Reports release notes
  - 2018 WorldShare Reports release notes
  - Known issues

- WorldShare Reports training
  
  No image available

  Find training on WorldShare Reports and WorldShare Report Designer.

- Troubleshooting
  
  No image available

  Find frequently asked questions (FAQ) and troubleshooting steps (Troubleshooting).

  - Are the statistics on stats.oclc.org Counter compliant?
  - Can I run a report of Local Holdings Records and barcodes
  - Can Report Designer be used to create a report showing the amount of titles and their material types in each shelving location?
  - Can you display weekly circulation statistic summaries, in a Monthly Circulation Statistics Report?
  - How do I create a Holds List Reports using 2 universes and new variables?
  - Does the Circulation Events Detail Report include ILL lending activity?
  - Do the My Collection Overlap Detail Report and My Collection Overlap Summary Report include grouped OCNs?
  - How can I get a list of items that have never been checked out?
  - How can I get a list of records that shows both the item barcode and its current location on the shelf?
  - How can I get reports for a different location
  - How can I get the item costs in the Circulation Item Inventories report into a standard format so I can total them?
  - How can I open my report in Microsoft Excel while keeping the OCN, ISBN and barcodes from becoming numbers?
  - How can I stop the leading zeros from item barcodes being stripped when I load a csv generated by
WorldShare Reports into Excel?
◦ How can I tell if a report has reached the 50,000 row limit?
◦ How can I use Last Seen Date for a Stocktake Report, when the Inventory option is not being used?
◦ How does my institution gain access to GroupAware Analytics in WMS?
◦ How do I add the role ANALYTICS_REPORT_AUTHOR_ADMIN to a user?
◦ How do I create a new report to see what new LHRs were added in a timeframe to a Shelving Location?
◦ How do I create a report that shows both circulation activity and item details such as Publication Date?
◦ How do I create a report to display LHR Public and Non Public notes?
◦ How do I create a useful report to help with stocktaking or weeding, when the Inventory process is not being used?
◦ How do I find items with duplicate barcodes?
◦ How do I find records with inactive barcodes in the 876$r marc tag?
◦ How do I get group reporting roles?
◦ How do I only extract Patron data for those that have data in Custom Data Fields - Patron Custom Category 1 and Patron Custom Category 2?
◦ How do I run a report to determine which patrons expire in a specific date range?
◦ How can I create a report listing all multi-part items?
◦ How to I locate all print records that have a WorldCat holding (held by) on them, but have no LHR records
◦ How to locate Items have been moved to a LOST shelving location?
◦ I've been trying to view a report under the Analytics tab, but the page will not load.
◦ In Report Designer, after entering a start date, no report options become available.
◦ Is there a way to run a report to pull just the records that are single part items?
◦ Items are displaying a long overdue date of 9999-01-01 on the "All Checked Out Items Report".
◦ Why can't I see the E-Resources reports in WorldShare Analytics?
◦ I am getting different counts each time I run the same report.
◦ I am not returning the funds I expect in my Payment Activity by Fund report.
◦ I attempted to run a report and it has just stayed on a loading screen
◦ I cannot find the Items Inventory Report or the Circulation Add/Delete Report, where are they?
◦ I cannot see the LHR Item Detail Universe in WorldShare Report Designer, why?
◦ I no longer see reports that used to display in the shared report templates
◦ I see "Unknown" or "N/A" in the Item Branch Name column of the Open Holds report. Why isn't a branch name always listed?
◦ Why do renewals appear in the Monthly Circulation Statistics report under the branch N/A?
◦ I would like a report of current titles in a particular shelving location
◦ My daily reports have run but are not available to download
◦ My report designer is missing features that I see displayed in the training video. How do I get those features turned on?
◦ My report shows last circulation date as all zeros
• No one at my library is able to see the Analytics tab in WorldShare, why?
• No report opens when I click on a report link
• Regarding the "Issue Count YTD" field: is this "year to date" for fiscal year, or for calendar year?
• The data in my report doesn't make sense.
• The left side menus never appear and a small orange triangle appears in the upper right side of the screen.
• We regularly run an overdue report but realise we are missing one or more patron custom categories within the filter
• What data could cause changes in the Title by Material Formats report?
• What does ASSESS mean in our Fiscal Detail Report?
• What does N/A refer to under item permanent shelving location in the Monthly Circulation Statistics Report?
• What exactly does "Initial holdings set in WorldCat" mean? And how is it different from “Add WorldCat record”?
• What is source application "OCLC PROCESSING" on the New Titles List?
• What report can I run to find items with no LHRs or Item Barcodes?
• When attempt to run a report, it just keeps spinning and then an error message pops up.
• When I pull our Patron Information Detail Report, it totals out at 50,000. Is there a 50,000 cap on records?
• When I run a report, I don't see activity that happened today.
• When I run our High Use Circulation Titles Summary Report, I'm not seeing titles that I know have high use
• Why am I receiving a SAP BusinessObjects login page after clicking on a report type?
• Why are items missing their OCLC number in our Circulation Item Inventories report?
• Why are my ILL Borrower Filled Turnaround Time numbers so high?
• Why are my title counts from the Title Holdings by Material Format higher than my Item count in Branch Item Holdings by Material Format?
• Why are Withdrawn Item not showing up on the Circulation Event Details report?
• Why can't I delete a folder from my 2.0 institutions folder tree?
• Why can't I find my locally created collection in My Collection Overlap Summary Report?
• Why can't I see the top 100 titles report?
• Why did a large number of my overdue items fall off the Overdue Items Aging Report
• Why doesn't the Circulation Events Detail Report match the Circulation module's Item record Issued Count?
• Why does our New Titles List not show call numbers and shelving locations for the items listed?
• Why does the error "No data to retrieve ..." come up when I run a report?
• Why does the lost or missing items report include items with the withdrawn status?
• Why do I retrieve duplicate rows when I run a report in the Acquisitions Universe
• Why do some databases appear twice in the Merged COUNTER Database Usage Summary report?
• Why is a request listed twice on the Document Delivery Request Detail report?
• Why is my report missing data?
• Why is Report Designer only able to calculate the Tax 1 amount per copy?