How do I create a report that shows a Nonpublic Note and Item Status?

Last updated: Mon, 02 Mar 2020 06:30:58 GMT

Applies to

- WorldShare Reports
- Report Designer

Answer

You will need to have Report Designer (the Report Launch Pad) to create this report. It requires two universes to be merged, so the different types of data can be combined and produced in the one report. You will be adding a new variable to your report, to get all the data you require in the one report.

This type of report is useful, if wanting a report to locate items that have a Nonpublic(Staff) Note on them with their current status, such as In Transit, Available or In Processing.

Steps:

Create the LHR Item Detail Report first

1. Go to Analytics > Reports > Report Launch Pad.
2. Go to Application > Web Intelligence > Select New > Universe > OK.
3. Select the LHR Item Detail Universe.
4. Drag and Drop Data Elements from the Yellow folders you wish to have in this report into the Reports Object field.
5. Select data elements such as OCLC Number, Title, Author Name, LHR Item Barcode, LHR Item Nonpublic Note.
6. Add a filter perhaps for material formats you wish to report on select Material Format (in List) & select formats you want to report on from list.
8. Use Refresh to check the data that is being bought in to ensure it is what you require.
9. Select Run Query > results will be displayed > you can adjust the column widths as required.

Now create the Second universe to be merged - (Circulation item Status).
10. Click on the icon to Edit Data Provider. The query panel will appear.

11. Click on Add Query from the universe and choose the Circulation item Status Universe.

12. Bring in the objects you’d like to use from this Universe. Item barcode (is required) then Item Status Current Status.

13. Note one of the objects chosen must also be in the other Universe to ensure a match can be made -such as item Barcode.

14. Click Run Queries.

15. Choose to Include the result objects in the document without generating a table.

16. Merge the queries by going to Data Access > Data Objects > Merge.

17. Choose Item Barcode from the Query 1, hold down Ctrl, and click Item Barcode from Query 2 > OK.

Now you need to create a New Variable to get the Item Status added to & displayed in this report.

To create the new Variables for the data you want to see in this report, do the following:

1. From the icons on the left, select the Select the Available objects icon > scroll down to Variables.

2. Right click on Variables > New.

3. Under Qualification select Detail.

4. To create the new variable you need to type a unique name for this variable for example: Status of Item or Item Status (one that does not already exist in the databases- so you can’t use Item Status Current Status).

5. For the Associated Dimension > Item barcode (merged dimension) from the drop-down list.

6. To create the required Formulae type = [Query 1]. then select the correct Available Object from the list below of available objects (it needs to be the associated matching object; in this case it would be Item Status Current Status. Example. = [Query 1].[Item Status Current Status].

7. You can check you have written the query correctly by selecting the ‘green tick’ to test.

8. Select OK.

9. Select the new variable under the Variables folder > Status of Item and drag into a new column where you want it to display.

10. Save As with a name that reminds you what it reports on and save to your institutions folder.

11. Export to Excel to reorganize any column you require ordered.