WorldShare Reports

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

https://help.oclc.org/Library_Management/WorldShare_Reports
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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.

- Create a custom report
- Query operators
- Universes

• Reference

Additional resources for WorldShare Reports

- Available reports for WMS users
- Disassociate patron data from circulation events
- Reconciliation FTP reports
• WorldShare Reports release notes and known issues

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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.

◦ 2019 WorldShare Reports release notes
◦ 2018 WorldShare Reports release notes
◦ 2017 WorldShare Reports release notes
◦ Known issues

• WorldShare Reports training

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Find training on WorldShare Reports.

◦ Start here: Standard reports
◦ Fundamentals of WorldShare Report Designer
◦ Create multiple universe reports in WorldShare Report Designer
◦ Exercises
◦ Videos

• Troubleshooting

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

◦ Are the statistics on stats.oclc.org Counter compliant?
◦ How do I create a Holds List Reports using 2 universes and new variables?
◦ How can I get reports for a different location
◦ How can I open my report in Microsoft Excel while keeping the OCN, ISBN and barcodes from becoming numbers?
◦ 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 find items with duplicate barcodes?
◦ How do I find records with inactive barcodes in the 876$r marc tag?
◦ How do I locate all records that have a WorldCat Holding on them, that have no LHR record?
◦ I’ve been trying to view a report under the Analytics tab, but the page will not load.
◦ Is there a way to get a report of items that have not circulated?
◦ 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”.
◦ I attempted to run a report and it has just stayed on a loading screen

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I cannot find the Items Inventory Report or the Circulation Add/Delete Report, where are they?

- 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?
- No report opens when I click on a report link
- The data in my report doesn't make sense.
- 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 is source application "OCLC PROCESSING" on the New Titles List?
- What report can I run to find items with no LHR's or Item Barcodes?
- 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 try to access using Firefox, the left side menus never appear and a small orange triangle appears in the upper right side of the screen.
- Why am I receiving a SAP BusinessObjects login page after clicking on a report type?
- Why can't I see the top 100 titles report?
- 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 some databases appear twice in the Merged COUNTER Database Usage Summary report?