How do I create a Transaction report on Circulation Events?

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Applies to

- WorldShare Reports

Answer

You can create a report to locate many different circulation event transactions, as well as being able to locate the staff who undertook the transaction by using the Report Designer in Analytics.

Steps:

1. Go to Analytics > Reports > Report Launch Pad.
2. Select Application > Web Intelligence > New.
3. Select Universe > OK > Circulation Events > OK.
4. Now you need to select the Result objects to add to your Query Panel (what you want to see in your report).
5. Select the Event item folder > OCLC number > double-click for it to appear in the Result Objects box (or drag it across to the Result Objects box).
6. Select the Event item folder > Item Title > double-click for it to appear in the Result Objects box.
7. Select the Event item folder > Item barcode > double-click for it to appear in the Result Objects box.
8. Select the Event Details folder > Event Branch Name > double-click for it to appear in the Result Objects box.
9. Select the Times & Dates folder > Event Dates folder > Event Date/time > double-click for it to appear in the Result Objects box.
10. Select the Event Staff folder > Event Staff Full Name > double-click for it to appear in the Result Objects box.

You can add any others required too, in the same way, and in the order you wish them to appear in your reports – you can easily select any of the Result Objects and drag it to the position you want it to appear in your report. Before you select Run Query.

Now you need to set the Query filter to locate the correct transactions you are interested in.

1. Select the Event Details folder > Event Type > drag across into the Query Filter box.

- Then select In List and select drop-down menu and select Value(s) from list (for the types of transactions you want to report on)
2. Select the Times & Dates folder > Event Dates folder > Event Date/time > drag across into the Query Filter box.

- Then select either Greater than or Equal to OR Less than or Equal to OR Between if you want a specific period of time in mind and select your date from the Calendar icon

3. Select Refresh to see what data will be pulled in.

4. If satisfied with the data being returned, select Run Query.

5. To stretch out the columns, hover the mouse pointer near the blue column edges and drag sideways.

6. You can export your report to Excel, using the export options

7. Also you should always save these created reports in your 2.0 Folder giving it a name you will remember what it was created for.

Additional information

WorldShare Report Designer

About Report Designer

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