Universes

Learn how to select a universe in Report Designer.

In WorldShare Report Designer, a universe maps to data in the database but presents data to you in non-technical terms. A universe contains classes, objects, and pre-defined query filters.

Reinforce your understanding with a practice exercise: Exploring the data.

Select a universe

1. In the left navigation, click Report Launch Pad.
2. Select Web Intelligence from the Applications drop-down list in the upper right-hand toolbar.
3. Click the New icon.
5. Select a universe. See below for a list of available universes.
6. Click OK.

Available universes

Acquisitions

Data refresh rate: Daily; after successful load, data will be "as of" the end of the previous calendar day.
Institution row limit: 50,000

The Acquisitions universe contains information from the activities in the WMS Acquisitions module. This includes data about purchase orders, receiving activity, and invoices. All of the standard Acquisitions reports, with the exception of the Serials Received Summary Report, are created from this universe.

The following classes and report objects are of note:

- Title class > Resource Metadata Type - This report object determines which of the following data types will be populated: Only one of these four data types will be populated depending on the value selected for this field.
  - KBWC_COLLECTION - KB collection data
  - KBWC_ENTRY - KB entry (title data)
  - LOCAL - Local data
  - WORLDCAT - OCLC number
- Invoice class - This class contains invoice numbers and system invoice number report objects.
  - The invoice number is an identifier provided by the vendor.
The system invoice number is generated by WMS.

- Order class - This class contains order level and individual copy level (line item) report objects.
- Budget transaction class - Any report that is intended to include payment or encumbrance amounts must include data from this class.
  - **Budget Transaction Type** - This report object indicates whether a transaction is an encumbrance or an expenditure. Any report that is reporting on expenditures must have Budget Transaction Type filtered to Expended.

## Acquisitions Vendor

**Data refresh rate:** Daily; after successful load, data will be "as of" the end of the previous calendar day.

**Institution row limit:** 50,000

The Acquisitions Vendor universe contains information from the Vendors screen of the Acquisitions module in WorldShare Management Services. This includes data about vendor names, addresses, and contacts. Each combination of vendor, address, and contact appears as its own row in a report, so you may have more than one row for a given vendor.

This universe can be used to create multi-universe reports with the Acquisitions Universe using the Vendor ID object located in the Identifiers folder.

## Cataloging

**Data refresh rate:**

- Volatility Information is updated daily; after successful load, data will be "as of" the end of the previous calendar day
- Title Holdings and Item Holdings Information updated monthly on the first of the month; after successful load, data will be "as of" the end of the previous calendar month

**Institution row limit:** 50,000

The Cataloging universe contains title holdings, item holdings, and volatility information for new and removed titles in your collection. Report objects from the Title Holding Information class cannot be combined with objects in the Item Holding or Volatility class and vice versa.

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

The following classes and report objects are of note:

- Item Holding Information class - This class comes from local holdings records (LHRs). Only one measure (Item Holdings Quantity) and four dimensions (Branch Name, Material Format, Material Subformat, and Shelving Location) are available for reporting on item holdings. If you want more detailed information on item holdings (e.g., Item barcode, title, publication date, last issued date), you can use the:
  - **LHR Item Detail** universe
Circulation Item Inventories data extract file

- Volatility Information class - This class contains report objects at the title level, not the item level. If you have added or deleted the same title more than once, only the first add or delete will be included.

Circulation Events

Data refresh rate: Daily; after successful load, data will be "as of" the end of the previous calendar day.

Institution row limit: 50,000

The Circulation Events universe contains historical information from the event transactions in the WMS Circulation module. This includes data about the patron associated with the transaction and bibliographic item-level information.

If you are looking for the current status of items, use the Circulation Item Status universe.

The following classes and report objects are of note:

- Event Details class > Event Borrower Category - This report object is the category at the time of the event. If the patron has changed type (e.g., Student to Staff) after the event, the borrower category will not be updated.
- Event Branch Name - This report object is where the event occurred.
- Item Branch Name - This report object is the branch that owns the item.
- Event Patron class - This class does not include all of your library's patrons. It only includes the patrons who are associated with a circulation event. You can use the Circulation Patron Information universe to access all of your library's patrons.

Note: Some fields may not be populated when using the Circulation Events universe to create a report. For example:

- When using Holds Placed, the event branch name would not be populated.
- When using Bills Paid, there may not be an item associated with the event.

Disassociate patron data from circulation events

Note: This feature is offered on an opt-in basis.

With WorldShare Reports and Report Designer, you can disassociate patron data from circulation events in the Circulation Events universe, Circulation Events Detail Report, and Daily Payments Report. This action removes all Personally Identifiable Information (PII) associated with a patron (e.g., Patron Full Name, Patron Email Address, and Patron Phone Number) from the circulation event. The circulation event and non-PII data (e.g., Event Borrower Category and Event Branch Name) will remain in the system. Disassociating the PII data but maintaining the transaction allows you to continue to track activity trends and perform analysis based on historical circulation events.

Patron data is still maintained and stored in Analytics. For example, patron data associated with current item status (e.g., what patron currently has an item checked out) is still present. So, reports from the Circulation Item Status universe, such as the All Checked Out Items Report and the Overdue Items Aging Report, will still have full patron data associated with the item records. The Circulation Patron Information universe is also not impacted, so the Patron Information Detail Report will still list patrons and their full details. There is also no impact to the Circulation Fiscal Transactions, Circulation Hold Request, and Circulation Scheduled Items universes, as well as the FTP reports.
If you would like to request this feature, contact analyticsfeedback@oclc.org with the information listed below. Upon receipt of your email, the Analytics product team will schedule a meeting with you to provide specific details.

Hello,

I would like to disassociate patron data from circulation events in WorldShare Reports and Report Designer.

Institution information:

- Institution name:
- Library symbol:

**Circulation Fiscal Transactions**

**Data refresh rate:** Daily; after successful load, data will be "as of" the end of the previous calendar day.

**Institution row limit:** 50,000

The Circulation Fiscal Transactions universe contains information about the source of any fiscal creation of bills, payment of bills, waiving, refunding, and cancelling bills.

The following classes and report objects are of note:

- Fiscal Transaction Details class > Fiscal Action Type - This report object contains the following values:
  - ASSESS - Represents that a bill was created. Links to one or more of the other action types.
  - CANCEL - One or more bills was fully canceled. Links back to one or more ASSESS transactions.
  - PAY - One or more bills was partially or fully paid. Links back to one or more ASSESS or PEND transactions.
  - PEND - One or more bills are waiting for online payment to process. Links back to one or more ASSESS or PAY transactions.
  - REFUND - One or more bills was partially or fully refunded. Links back to one or more ASSESS or PAY transactions.
  - WAIVE - One or more bills was partially or fully waived. Links back to one or more ASSESS transactions.

- Fiscal Transaction Patron class - This class does not include all of your library's patrons. It only includes the patrons who are associated with a fiscal transaction. You can use the Circulation Patron Information universe to access all of your library's patrons.

**Circulation Hold Request**

**Data refresh rate:** Daily; after successful load, data will be "as of" the end of the previous calendar day.

**Institution row limit:** 50,000

The Circulation Hold Request universe contains information about all current hold requests. This includes data about the title being requested, the requestor, and dates associated with the hold. This universe does not include scheduled items.

If you are looking for scheduled items, use the Circulation Scheduled Items universe.
Note: The information in this universe is a snapshot of current hold activity. It should not be used for analysis of historical holds activity.

The following classes and report objects are of note:

- Hold Details class > Hold Request Scope - This report object can be used to filter by BIB (title-level) or item-level hold.
- Hold Patron class - This class does not include all of your library's patrons. It only includes the patrons who are associated with an item status. You can use the Circulation Patron Information universe to access all of your library's patrons.

**Circulation Item Status**

**Data refresh rate:** Daily; after successful load, data will be "as of" the end of the previous calendar day.

**Institution row limit:** 50,000

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.

Note: The information in this universe is a snapshot of the current item status. It should not be used for analysis of historical item activity.

The following classes and report objects are of note:

- Item Status Patron class - This class does not include:
  - Associated patron information for all item statuses (e.g., In Transit).
  - All of your library's patrons. It only contains the patrons who are associated with an item status. You can use the Circulation Patron Information universe to access all of your library's patrons.

**Circulation Patron Information**

**Data refresh rate:** Daily; after successful load, data will be "as of" the end of the previous calendar day.

**Institution row limit:** 50,000

The Circulation Patron Information universe contains information about all of your patrons whether or not they are associated with any activities in WMS. This universe can be used to report on patron account expiration, patrons with missing information, etc.

The following classes and report objects are of note:

- Contact Information class - This class only includes a patron's primary email, address, and phone number.

**Circulation Scheduled Items**

**Data refresh rate:** Daily; after successful load, data will be "as of" the end of the previous calendar day.

**Institution row limit:** 50,000
The Circulation Scheduled Items universe contains information about items that have been scheduled in WorldShare Circulation. This includes data about the item and patron data that might be associated with the schedule.

**Data Refresh Activity**

- **Data refresh rate:** Snapshot (current data only)
- **Institution row limit:** 50,000

The Data Refresh Activity universe contains the date and time that each universe was last updated. It also contains the refresh frequency of all available universes.

**E-Resources COUNTER 4**

- **Data refresh rate:** Daily; after successful load, data will be "as of" the end of the previous calendar day.
- **Institution row limit:** 50,000

The E-Resources universe contains e-resources COUNTER 4 usage data loaded through WorldShare License Manager by your library or directly by a vendor.

Note: In order for data to appear in this universe, you must first utilize COUNTER usage harvesting in WorldShare License Manager (i.e., via SUSHI).

**E-Resources COUNTER 5**

- **Data refresh rate:** Daily; after successful load, data will be "as of" the end of the previous calendar day.
- **Institution row limit:** 50,000

The E-Resources universe contains e-resources COUNTER 5 usage data loaded through WorldShare License Manager by your library or directly by a vendor.

Note: In order for data to appear in this universe, you must first utilize COUNTER usage harvesting in WorldShare License Manager (i.e., via SUSHI).

**Group Activity**

- **Data refresh rate:** Monthly on the first of the month; after successful load, data will be "as of" the end of the previous calendar month.
- **Group row limit:** 500,000

The Group Activity universe contains data about the titles added and removed at the WMS group level. Users can view titles added or removed across data periods.

Note: For more information regarding WorldShare Reports and Report Designer groups, please see About WMS Group reports.
Group Titles

Data refresh rate: Monthly on the first of the month; after successful load, data will be "as of" the end of the previous calendar month.
Group row limit: 500,000

The Group Titles universe contains information regarding the titles held by a WMS group. Users can compare title holdings at the group level across monthly snapshots of title holdings.

Note: For more information regarding WorldShare Reports and Report Designer groups, please see About WMS Group reports.

Institution Title Holdings

Data refresh rate: Daily; after successful load, data will be "as of" the end of the previous calendar day.
Institution row limit: 500,000

The Institution Title Holdings universe contains current data about an institution's title holdings, as well as bibliographic data about the title. This universe can also be used to count current title holdings according to a custom report's selected parameters.

Interlibrary Loan

Data refresh rate: Monthly on the first of the month; after successful load, data will be "as of" the end of the previous calendar month.
Institution row limit: 50,000

The Interlibrary Loan universe contains details regarding loan requests, including events and statuses.

LHR Item Detail

Data refresh rate: Daily; after successful load, data will be "as of" the end of the previous calendar day.
Institution row limit: 500,000

The LHR Item Detail universe contains current details regarding the LHR items owned, created, or maintained by the institution.

Minimum fields for lowest grain results

Item 'uniqueness' is determined by a combination of LHR subfields. To ensure that all relevant item holdings are retrieved, it is suggested that the following six objects be included in each report:

- LHR Control Number: From 001, the system-supplied control number assigned to a separate local holdings record.
- LHR Item Barcode: From 876-878 $p or 852 $p, the unique, machine-readable code used to identify the item when performing library functions such as check in, check out, etc.
- LHR Basic Unit Enumeration and Chronology: From fields 853 and 863, the numeric, alphabetic, and/or date
designation that either appears on an item or that is used to record the receipt of an item.

- **LHR Index Enumeration and Chronology**: From fields 855 and 865, the numeric, alphabetic, and/or date designation for an index that appears on an item or that is used to record the receipt of an item.

- **LHR Supplement Enumeration and Chronology**: From fields 854 and 864, the numeric, alphabetic, and/or date designation for supplementary material that either appears on an item or that is used to record the receipt of an item.

- **LHR Item Textual Holdings**: From 866-868 $a, a textual description of the holdings used instead of or in addition to the coded 853-855 and 863-865 fields when those fields cannot be used adequately to describe the holdings.

**Example:**

Before pulling in LHR Basic Unit Enumeration and Chronology, it looks like one item record:

<table>
<thead>
<tr>
<th>LHR Control Number</th>
<th>LHR Item Barcode</th>
<th>LHR Item Call Number</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>185496017</td>
<td>N/A</td>
<td>300 .G34</td>
<td>Séminaire de géométrie algébrique 1960-61.</td>
</tr>
</tbody>
</table>

After pulling in LHR Basic Unit Enumeration and Chronology, it is actually three records:

<table>
<thead>
<tr>
<th>LHR Control Number</th>
<th>LHR Item Barcode</th>
<th>LHR Item Call Number</th>
<th>Title</th>
<th>LHR Basic Unit Enumeration and Chronology</th>
</tr>
</thead>
<tbody>
<tr>
<td>185496017</td>
<td>N/A</td>
<td>300 .G34</td>
<td>Séminaire de géométrie algébrique 1960-61.</td>
<td>Tome 1</td>
</tr>
<tr>
<td>185496017</td>
<td>N/A</td>
<td>300 .G34</td>
<td>Séminaire de géométrie algébrique 1960-61.</td>
<td>Tome 2</td>
</tr>
<tr>
<td>185496017</td>
<td>N/A</td>
<td>300 .G34</td>
<td>Séminaire de géométrie algébrique 1960-61.</td>
<td>Tome 3</td>
</tr>
</tbody>
</table>

**Overlap**

**Data refresh rate**: Monthly on the first of the month; after successful load, data will be "as of" the end of the previous calendar month.

**Institution row limit**: 500,000

The Overlap universe contains information about public WorldShare Knowledge Base collections and titles within those collections. This universe allows libraries to compare WorldShare Knowledge Base collections in order to see which titles in the collections overlap.

Note: The information in this universe is a monthly snapshot of KB collections and titles. It should not be used for historical analysis.


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Serials Received

Data refresh rate: Daily; after successful load, data will be "as of" the end of the previous calendar day.
Institution row limit: 50,000

The Serials Received universe contains data about serials received through WMS Acquisitions. This universe contains information about the received item as well as the received action, including issue counts and received dates and times.