Reports and Report Designer account roles

Learn about the roles available for managing accounts in WorldShare Reports and Report Designer.

WorldShare Admin

For more information about roles and managing accounts, see WorldShare Admin, User management.

To view all available WorldShare roles, see WorldShare Admin, Roles.

Note: Please contact OCLC Support for if you need assistance as certain cataloging roles require participation in National Cooperative Cataloging Programs before they can be assigned.

Reports and Report Designer roles

- Analytics Report Scheduler
- Analytics Report Author
- Analytics Report Author Admin

Note: You can view individual standard reports (Acquisitions, Cataloging/Collection, Circulation, E-Resources, Interlibrary Loan, and Metadata) without having one of the above roles assigned. See Reports and Report Designer authorization roles for more information.

Additional Reports roles

<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLE</th>
<th>ANALYTICS REPORT ADMIN</th>
<th>ANALYTICS REPORT STAFF</th>
<th>ANALYTICS USER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign Analytics Report roles to other users.</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View My Library and export data.</td>
<td>X</td>
<td>X</td>
<td></td>
<td>Do not use.</td>
</tr>
<tr>
<td>View My Files.</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/WorldShare_Reports/Get_started/Account_roles
Printed: Fri, 12 Feb 2021 11:29:46 GMT
# Reports and Report Designer roles comparison

<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLE</th>
<th>ACTION</th>
<th>ROLE</th>
<th>ACTION</th>
<th>ROLE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assign Report Author roles to other users.</td>
<td>ANALYTICS REPORT SCHEDULER</td>
<td>ANALYTICS REPORT AUTHOR</td>
<td></td>
<td>ANALYTICS REPORT AUTHOR ADMIN</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Author ad-hoc reports in the analytics environment.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Schedule any report.</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
</tbody>
</table>

# Reports and Report Designer authorization roles

## Acquisitions reports

If you have one of the roles below assigned, you can view individual Acquisitions standard reports without having a Reports and Report Designer role assigned. For more information about these roles, see [Acquisitions roles](https://help.oclc.org/Library_Management/WorldShare_Reports/Get_started/Account_roles).

<table>
<thead>
<tr>
<th>REPORT</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ACQUISITIONS ADMIN</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Acquisitions Dashboard</td>
<td>x</td>
</tr>
<tr>
<td>Acquisitions Data Last Refreshed</td>
<td>x</td>
</tr>
<tr>
<td>Fund Balance</td>
<td>x</td>
</tr>
<tr>
<td>Open Encumbrances</td>
<td>x</td>
</tr>
<tr>
<td>Paid Invoice Summary Report</td>
<td>x</td>
</tr>
<tr>
<td>Paid Invoice Item Detail Report</td>
<td>x</td>
</tr>
<tr>
<td>Payment Activity by</td>
<td>x</td>
</tr>
<tr>
<td>REPORT</td>
<td>ROLES</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>------------------------------</td>
</tr>
<tr>
<td></td>
<td>ACQUISITIONS ADMIN</td>
</tr>
<tr>
<td>Classification</td>
<td></td>
</tr>
<tr>
<td>Payment Activity by Fund</td>
<td>x</td>
</tr>
<tr>
<td>Payment Activity by Location</td>
<td>x</td>
</tr>
<tr>
<td>Payment Activity by Material Format</td>
<td>x</td>
</tr>
<tr>
<td>Payment Activity by Processing Type</td>
<td>x</td>
</tr>
<tr>
<td>Payment Activity by Requestor</td>
<td>x</td>
</tr>
<tr>
<td>Payment Activity by Vendor</td>
<td>x</td>
</tr>
<tr>
<td>Receiving Activity by Location</td>
<td>x</td>
</tr>
<tr>
<td>Serials Received Summary Report</td>
<td>x</td>
</tr>
<tr>
<td>Title Copy Detail Report</td>
<td>x</td>
</tr>
<tr>
<td>Vendor Performance</td>
<td>x</td>
</tr>
</tbody>
</table>

**Cataloging/Collection reports**

If you have one of the roles below assigned, you can view individual Cataloging/Collection standard reports without having a Reports and Report Designer role assigned. For more information about these roles, see [Record Manager roles](https://help.oclc.org/Library_Management/WorldShare_Reports/Get_started/Account_roles).
<table>
<thead>
<tr>
<th>REPORT</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CATALOGING AGENT</td>
</tr>
<tr>
<td>Material Format</td>
<td></td>
</tr>
<tr>
<td>Branch Item Holdings by Shelving Location</td>
<td>x</td>
</tr>
<tr>
<td>Cataloging Data Last Refreshed</td>
<td>x</td>
</tr>
<tr>
<td>Count of New and Removed Group Titles</td>
<td>x</td>
</tr>
<tr>
<td>Group Cataloging Data Last Refreshed</td>
<td>x</td>
</tr>
<tr>
<td>LHR Duplicate Barcodes</td>
<td>x</td>
</tr>
<tr>
<td>New Titles List</td>
<td>x</td>
</tr>
<tr>
<td>Removed Titles List</td>
<td>x</td>
</tr>
<tr>
<td>Title Counts for Group Catalog Report</td>
<td>x</td>
</tr>
<tr>
<td>Title Holdings by Material Format</td>
<td>x</td>
</tr>
<tr>
<td>Title Holdings by Material Format and Publish Date</td>
<td>x</td>
</tr>
<tr>
<td>Title Holdings by OCLC Subject Conspectus</td>
<td>x</td>
</tr>
<tr>
<td>Title Holdings Count by Institution</td>
<td>x</td>
</tr>
<tr>
<td>Titles Held by a Single Institution</td>
<td>x</td>
</tr>
</tbody>
</table>

**Circulation reports**

If you have one of the roles below assigned, you can view individual Circulation standard reports without having a Reports and Report Designer role assigned. For more information about these roles, see [Circulation roles](https://help.oclc.org/Library_Management/WorldShare_Reports/Get_started/Account_roles).
<table>
<thead>
<tr>
<th>REPORT</th>
<th>CIRCULATION ADMIN</th>
<th>CIRCULATION DESK</th>
<th>WMS GROUP CIRCULATION ADMIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Checked Out Items Report</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Circulation Add-Delete Report¹</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Circulation Dashboard</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Circulation Data Last Refreshed</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Circulation Events Detail Report</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Daily Payments Report</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Fiscal Detail Report</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Fiscal Summary Report</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Group All Checked Out Items Report</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Group Circulation Events Detail Report</td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Group Open Holds Request Report</td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Group Overdue Items Report</td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>High Use Circulation Titles Summary Report</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Holds List Report</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Holds Ready for Pickup Report</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Hourly Average Circulation Activity Daily Chart</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
</tbody>
</table>

¹ Report specific to the OneCard function.
<table>
<thead>
<tr>
<th>Report Title</th>
<th>Circulation</th>
<th>Acquisitions</th>
<th>LHR Item Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hourly Average Circulation Activity Summary Report</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Item Status Statistics Chart</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Items in Transit Report</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Lost or Missing Items Report</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Monthly Circulation Statistics Report</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Open Holds Report</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Outstanding Fees and Bills Report</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Overdue Items Aging Report</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Patron Counts Summary Report</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Patron Information Detail Report</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Recalled Items Report</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
</tbody>
</table>

1 This report uses Circulation, Acquisitions, and LHR Item Detail data, so the following roles are needed in addition to the Circulation roles identified:

- ACQUISITIONS_ADMIN OR ACQ SENIOR STAFF
- CATALOGING AGENT OR CATALOGING FULL OR CATALOGING INST ADMIN

### E-Resources reports

If you have one of the roles below assigned, you can view individual E-Resources standard reports without having a Reports and Report Designer role assigned. For more information about these roles, see [Collection Manager roles](https://help.oclc.org/Library_Management/WorldShare_Reports/Get_started/Account_roles) and [License Manager roles](https://help.oclc.org/Library_Management/WorldShare_Reports/Get_started/Account_roles).
<table>
<thead>
<tr>
<th>REPORT</th>
<th>LICENSE MANAGER ADMIN</th>
<th>LICENSE MANAGER STAFF</th>
<th>COLLECTION MANAGER ADMIN</th>
<th>COLLECTION MANAGER SUPERVISOR</th>
<th>COLLECTION MANAGER STAFF</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-Resources Data Last Refreshed</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>COUNTER 4 Merged E-Journal/E-Book Usage Detail</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COUNTER 4 Merged E-Journal/E-Book Usage Summary</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COUNTER 4 Merged Database Usage Detail</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COUNTER 4 Merged Database Usage Summary</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COUNTER 4 Merged Vendor Usage Detail</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COUNTER 4 Titles with Zero Usage Detail</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COUNTER 4 Top 100 Title Usage</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COUNTER 5 Database Denials Summary</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COUNTER 5 Database Usage Summary</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>REPORT</td>
<td>LICENSE MANAGER ADMIN</td>
<td>LICENSE MANAGER STAFF</td>
<td>COLLECTION MANAGER ADMIN</td>
<td>COLLECTION MANAGER SUPERVISOR</td>
<td>COLLECTION MANAGER STAFF</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>-----------------------</td>
<td>-----------------------</td>
<td>--------------------------</td>
<td>-------------------------------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>COUNTER 5 Database Vendor Usage Detail</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COUNTER 5 E-Book Title Usage Comparison</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COUNTER 5 E-Journal Title Usage Comparison</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COUNTER 5 E-Journal/E-book Platform Usage</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COUNTER 5 Merged E-Journal/E-book Usage Detail</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COUNTER 5 E-Journal/E-book Usage Summary</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WorldCat knowledge base - Collection Overlap Detail Report</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>WorldCat knowledge base - Collection Overlap Summary Report</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>WorldCat knowledge base - My Collection</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>
### Interlibrary Loan reports

Note: Only libraries using Tipasa can view Interlibrary Loan reports.

If you have one of the roles below assigned, you can view individual Interlibrary Loan standard reports without having a Reports and Report Designer role assigned. For more information about these roles, see Interlibrary Loan roles.

<table>
<thead>
<tr>
<th>REPORTS</th>
<th>ROLE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WorldShare ILL Admin</strong></td>
<td>x</td>
</tr>
<tr>
<td>Circulation Data Last Refreshed</td>
<td>x</td>
</tr>
<tr>
<td>Document Delivery Activity Overview</td>
<td>x</td>
</tr>
<tr>
<td>Document Delivery Request Detail</td>
<td>x</td>
</tr>
<tr>
<td>Document Delivery Request Statistics</td>
<td>x</td>
</tr>
<tr>
<td>Interlibrary Loan Data Last Refreshed</td>
<td>x</td>
</tr>
<tr>
<td>Patron Counts Summary Report</td>
<td>x</td>
</tr>
<tr>
<td>Patron Information Detail Report</td>
<td>x</td>
</tr>
</tbody>
</table>

Note: In addition to viewing the standard reports above, users who have the WorldShare ILL Admin role assigned can author reports in Report Designer.
Metadata reports

If you have one of the roles below assigned, you can view individual Metadata standard reports without having a Reports and Report Designer role assigned. For more information about these roles, see [Record Manager roles](https://help.oclc.org/Library_Management/WorldShare_Reports/Get_started/Account_roles).

<table>
<thead>
<tr>
<th>REPORT</th>
<th>CATALOGING AGENT</th>
<th>CATALOGING FULL</th>
<th>CATALOGING ADMIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily LHR Maintenance Summary</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Daily Record Manager Actions</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Daily WorldCat Metadata API Actions</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Monthly Local Holdings Record Maintenance</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Detail Report</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Monthly Local Holdings Record Maintenance</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Summary Report</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Monthly Record Manager Actions</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Monthly WorldCat Metadata API Actions</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Update Bulk LBD Records (Record Work Lists)</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Update Bulk LHRs (Record Work Lists)</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>