Learn how to use WMS group reports to monitor your group's activity within WorldShare.

Overview

WMS Groups can use the tools available in WMS group reports to monitor your group's activity within the WorldShare application, including reports on WMS activity and cataloging work in Record Manager.

If your group wishes to pursue WMS Group reporting, please confirm that you meet the prerequisites below and then contact analyticsfeedback@oclc.org.

• Your group must be set up as a WMS Group.
• All group member institutions must be Report Designer customers.
• Your group must designate administrators. Group report administrators will see all data for the group (e.g., Circulation Administrators will see all patron and circulation data across the group). Please confirm your WMS Group leadership is aware and accepting of this functionality.

The OCLC Analytics team will be responsible for applying the necessary roles in order to allow the admin user to perform group-level reporting. OCLC Analytics will provide additional information about running these reports and understanding the output.

Note: Custom reports created using the Group Activity or Group Titles universes have a 500,000 row limit.

WMS group report administrator roles

<table>
<thead>
<tr>
<th>GROUP ADMINISTRATOR ROLE</th>
<th>AVAILABLE UNIVERSES WITH VISIBLE GROUP MEMBER DATA</th>
</tr>
</thead>
<tbody>
<tr>
<td>WMS_GROUP_ACQUISITIONS_ADMIN</td>
<td>Acquisitions, Serials Received</td>
</tr>
<tr>
<td></td>
<td>Cataloging, Group Activity</td>
</tr>
<tr>
<td>WMS_GROUP_CATALOGING_ADMIN</td>
<td>Group Titles, Institution Title Holdings, LHR Item Detail</td>
</tr>
<tr>
<td>GROUP ADMINISTRATOR ROLE</td>
<td>AVAILABLE UNIVERSES WITH VISIBLE GROUP MEMBER DATA</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------------------------</td>
</tr>
</tbody>
</table>
| WMS_GROUP_CIRCULATION_ADMIN | Circulation Events  
Circulation Fiscal Transactions  
Circulation Hold Request  
Circulation Item Status  
Circulation Patron Information  
Circulation Scheduled Items |
| WMS_GROUP_ERESOURCES_ADMIN | E-Resources  
Overlap |

**Open a new group report**

1. In the left navigation, click **Report Launch Pad**.
2. Select your **group symbol** from the Report Scope drop-down list and then click **Continue**.
3. Click a **report category** folder.
4. Double-click the **name** of the report you wish to run. The report will open in a new tab in the Report Launch Pad.