How do I create a Holds List Reports using 2 universes and new variables?

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Applies to

• WorldShare Report Designer

Answer

If you would like to run a Holds List Report for current holds, showing the full patron name, and also see who the item is currently checkout to and the items current status, it is possible to create a report by merging two universes and adding more variables.

Steps:

2. Open the Holds List Report.
3. Go to Design Mode.
4. Click on the icon to Edit Data Provider. The query panel will appear.
5. Click on Add Query from the universe and choose the Circulation Status Universe.
6. Bring in the objects you’d like from this Universe. Item barcode is required.
7. Click Run Queries. Choose to include the result objects in the document without generating a table.
8. Merge the queries by going to Data Access > Data Objects > Merge.
9. Choose Item Barcode from the Open Holds Report, hold down Ctrl, and click Item Barcode from Query 1 > OK.


1. You will need to create some new Variables for the data you want to see in this report.
2. Select the Available objects icon on the left > scroll down the list to Variables.
3. Right click on Variables > New.
4. Under qualification select Detail.
5. To create the new variable e.g. Checkout Patron Barcode type a unique name for this variable, such as this one (one that does not exist in the databases).
6. For the Associated Dimension > Item barcode (merged dimension) from the drop-down list.
7. To create the required Formulae type = [Query 1], then select the correct Available Object from the list below of available objects (it needs to be the associated matching object, in this case it would be Patron Barcode).
8. Double clicking on Patron Barcode, it will then drop it into your formulae.
9. Select the green tick on the right to ensure your formulae is correct. Click OK.
10. Reviewing the Variables in the available objects list on the left, you will see your new variable has now been added.
11. To display this new Variable, add a new column to your report.
12. Select the new Variable and drag it onto the top (blue box) of the new column created.

These steps 1-12 will need to be repeated with the other data, you want to have variables for – such as Patron Full Name and Item Current Status.

When you have all the variables you require, Save As in your circulation reports area, giving the report a suitable name (different from the regular Holds List Report).

**Extra variables you may wish to create:**

(Unique name) Item Current Status > selecting Item Status Current Status from the available objects list for your formulae
(Unique name) On hold Patron Name > selecting Patron Full Name from the available objects list for your formulae

**Additional information**

Using Universes

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Page ID
13039