How do I create a report that shows both circulation activity and item details such as Publication Date?

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Instructions on how to create your own report in the Report Designer to view both circulation activity and some other data from the LHR detail universe - that would possibly help in weeding and/or collection management tasks/decisions.

Applies to

- WorldShare Reports
- Report Designer

Answer

You will need to have Report Designer (the Report Launch Pad) to create this report. It requires two universe to be merged, so the different types of data can be combined and produced in the one report.

This type of report is useful, if wanting a report to use for stocktaking or weeding purposes, if you haven't used the Inventory option.

Steps:

Create the Circulation Item status Report first

1. Go to Analytics > Reports > Report Launch Pad.
2. Go to Application > Web Intelligence > Select New > Universe > OK.
3. Select the Circulation Item Status Universe.
4. Drag and Drop Data Elements from the Yellow folders you wish to have in this report into the Reports Object field.
5. Select data elements such as, Item Branch Name, Item OCLC Number, Item Title, Item Barcode, Item Current Status, Item Title.
6. Then select Item last issued Date from the Dates/Time folder and then from the Measures folder select Item issued Count.
7. Add in your filter the time frame you wish to use for Item last issued Date using the options Between or Less than, Greater than.
8. Use Refresh to check the data that is being brought in to ensure it is what you require.
9. Select Run Query > results will be displayed > you can adjust the column widths as required.
Now create the Second universe to be merged - (LHR Item Detail)

10. Click on the icon to Edit Data Provider. The query panel will appear.
11. Click on Add Query from the universe and choose the LHR Item Detail Universe.
12. Bring in the objects you’d like to use from this Universe. Item barcode (is required) Publication Date.
13. Note one of the objects chosen must also be in the other Universe to ensure a match can be made - such as item Barcode.
14. Click Run Queries.
15. Choose to Include the result objects in the document without generating a table.
16. Merge the queries by going to Data Access > Data Objects > Merge.
17. Choose Item Barcode from the Query 1, hold down Ctrl, and click Item Barcode from Query 2 > OK.

Now you need to create a New Variable to get the Publication Date added to & displayed in this report.

To create the new Variables for the data you want to see in this report, do the following:

1. From the icons on the left, select the Select the Available objects icon > scroll down to Variables.
2. Right click on Variables > New.
3. Under Qualification select Detail.
4. To create the new variable e.g. Published Date type a unique name for this variable, such as this one (one that does not already exist in the databases - can't use Publication Date.
5. For the Associated Dimension > Item barcode (merged dimension) from the drop-down list.
6. To create the required Formula type = [Query 2]. 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 Publication Date.
7. You can check you have written the query correctly by selecting the ‘green tick’ to test.
8. Select OK.
9. Select the new variable under the Variables folder > Published Date and drag into a new column where you want it to display.
10. Save As with a name that reminds you what it reports on and save to your institutions folder.
11. Export to Excel to reorganize any column you require ordered.

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