How do I create a useful report to help with stocktaking or weeding, when the Inventory process is not being used?

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An alternative type of report that is very useful, if wanting a report to use for stocktaking / inventory or weeding purposes. When you haven't used the Inventory process/ option in Circulation.

Applies to

- WorldShare Reports
- Report Designer

Answer

You will need to have Report Designer (the Report Launch Pad) to create this report. You will start with a standard Report and add a new query from a different universe, so the data can be combined and produced in the one report. This report will also allow you to include the publication date, with the circulation event report.

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

Steps:

2. Open the standard Circulation Event 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 LHR Detail Universe.
6. Bring in the objects you’d like from this Universe. Item barcode (is required), Publication Date.
   [Item barcode is required, as this is the common data object in both universes you will need to merge them]
7. Click Run Queries.
8. Choose to include the result objects in the document 'without generating a table'.
9. Merge the queries by going to Data Access > Data Objects > Merge.
10. Choose Item Barcode from the Circulation Event report, hold down Ctrl, and click Item Barcode from Query 1 > OK.

Now you need to create a new Variable to get the Publication Date added to this report.
To create some **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).
5. For the **Associated Dimension** > **Item barcode (merged dimension)** from the drop-down list.
6. To create the required **Formulae** type \[ \text{Query 1} \]. 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 **Publication Date**.
   For example: \[ \text{Query 1} \].[\text{Published date}] 
7. Select **OK**.
8. You can check you have written the query correctly by selecting the ‘**green tick**’ to test.
9. Now select the new variable **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.