WorldShare Reports release notes, June 2017

Last updated: Wed, 28 Feb 2018 18:13:01 GMT

Release Date: June 30, 2017

Introduction

Review these sections to see the new features, enhancements and bug fixes for this release:

- Reporting updates
- Other new features and enhancements
- Bug fixes

Important links are also available.

Reporting Updates

Acquisitions Reports

Acquisitions Dashboard

The Acquisitions Dashboard is now a WorldShare Report. Users will no longer see the option for the original dashboard under the Reports menu. The new dashboard can be found with the other Acquisitions reports under the Analytics tab or in Report Launch Pad (report schedulers / authors only):

The dashboard provides an “at-a-glance” view of Acquisitions activity for your institution. The report can be viewed, exported, and scheduled like other WorldShare Reports. It utilizes the same source data as the other Acquisitions...
Circulation Reports

Circulation Dashboard

A new Circulation Dashboard provides a quick view of circulation activity at your library.

The dashboard provides two sets of visualizations: Historical Trends and Current State. Use the tabs at the bottom of the screen to switch between views.
Each tab can be exported separately. When scheduling, both tabs will be included.

Circulation Dashboard: Historical Trends

Historical Trends includes four components:

- **Monthly Circulation Activity**: Stacked column chart to compare the number of items checked out, renewed, and soft checked out by month.
- **Circulation at Top 5 Shelving Locations**: Stacked bar chart that presents the top five permanent shelving locations from which items have been checked out, renewed, and soft checked out.
- **Titles With Most Circulation Activity**: List of the titles with the seven highest total counts of check outs, renewals, and soft check outs.
- **Hold Pickup Activity by Borrower Category**: Double column bar chart that compares the total number of holds picked up or expired by borrower category.
Note that prompt and input control values will only impact the Historical Trends tab.

**Note to Report Designers:** Data for the Historical Trends tab is sourced from the Circulation Events universe.

**Circulation Dashboard: Current State**

Current state includes one visualization, two counts, and one list:

- **Circulation Items by Current Status:** Donut chart that displays percentages of the circulating collection by item status.
- **Number of Items Currently On Loan:** Count of items where item status is On Loan.
- **Titles with the Most Current Holds:** List of the titles with the six highest hold counts.
- **Number of Items Currently On Hold:** Count of items where item status is On Hold.

Note that the Current State tab displays data as-of the end of the previous day.
Note to Report Designers: Data for the Current State tab is sourced from the Circulation Item Status and Circulation Hold Request universes.

Holds List Report

The Holds List is now available as a WorldShare Report. A previous version was available via OCLC FTP (wms/reports directory). The FTP version will be discontinued after 31 July 2017.

For your convenience, Item OCLC Number has been added to the new report. Also, the new version offers input controls that allow you to filter by Item Holding Location, Item Material Format, Item Permanent Shelving Location, and/or Item Temporary Shelving Location.

The data associated with the Holds List Report is refreshed daily and can be scheduled for automatic delivery to My Files and your institution’s FTP location in the analytic/reports directory.
Note to Report Designers: Data for the Holds List is sourced from a cross-universe query of the Circulation Item Status and Circulation Hold Request universes.

Holds Ready for Pickup Report

The Holds Ready for Pickup report is now a WorldShare Report. A previous version was available via OCLC FTP (wms/reports directory). The FTP version will be discontinued after 31 July 2017.

Item Holding Location and Hold Needed Before Date have been added to the new report. Input controls will allow you to filter Item Holding Location, Item Material Format, or Hold Pickup Branch Name.

The data associated with the Holds Ready for Pickup Report is refreshed daily and can be scheduled for automatic delivery to My Files and your institution’s FTP location in the analytic/reports directory.

Note to Report Designers: Data for the Holds Ready for Pickup Report is sourced from a cross-universe query of the
E-Resources Reports

WorldCat knowledge base – My Collection Overlap Summary Report

The My Collection Overlap Summary Report has been redesigned to include your institutions’ private, shared, local copy, and local customized collections.

Use this report to compare one of your library’s selected collections to one or more Global collections or to one or more of your library’s other selected collections. Note that the criteria for title overlap continues to be OCLC number.

Note: The refresh rate for the Overlap universe and the associated WorldCat knowledge base reports has been changed to allow for additional OCLC processing time. Data will be refreshed monthly on the 4th of the month; after successful load, data will be “as of” the end of the previous calendar month.

The new **Collection Type** dimension defines the types of knowledge base (KB) collections as follows:

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>The complete, public OCLC version of the collection</td>
</tr>
<tr>
<td>Local Copy</td>
<td>The complete OCLC version of the collection that has been selected by your institution (i.e. ‘select all’ collection).</td>
</tr>
<tr>
<td>Owned</td>
<td></td>
</tr>
<tr>
<td>Local Customized</td>
<td>A subset of the titles in the OCLC version of the collection as selected by your library.</td>
</tr>
<tr>
<td>Private</td>
<td>A locally created collection.</td>
</tr>
<tr>
<td>Shared</td>
<td>A collection that was created by a different institution and shared to your library. Only the titles selected by your institution are included.</td>
</tr>
</tbody>
</table>

The prompts in this report are as follows:

- **Comparison Collection ID**: Choose one from a list of the knowledge base (KB) collections owned by your library. Use the search feature to find collections by type, UID, or name.
• **Base Collection Type**: Choose if you would like to select from a list of Global collections or from the list of collections your library owns.

• **Base Collection ID**: Depending on your selection in the Base Collection Type prompt, choose one or more Global collections or collections owned by your library.
Note that the Base Collection ID prompt requires you to first make a selection in the Base Collection Type prompt.

Other new features and enhancements

Report Designer: Relative Dates

A relative date is a period of time that is relative to the current date (e.g., last week, last month, etc.).

As universe parameters, relative dates allow you to create reports that you can run periodically and/or schedule without needing to alter the values in your date prompts. For example, you can schedule a report to run every morning that has a start date of ‘3 Months Ago’ and an end date of ‘This morning.’

Note that relative dates are only available for objects with a data type of ‘Date’ or ‘Date Time.’ You can quickly check the data type by hovering over the object in Report Designer:
The following relative dates are available as parameters in all universes:

<table>
<thead>
<tr>
<th>NAME</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yesterday morning</td>
<td>12:00:00 AM institution's local time on the day before the current day.</td>
</tr>
<tr>
<td>This morning</td>
<td>12:00:00 AM institution's local time on the current day.</td>
</tr>
<tr>
<td>Beginning of last week</td>
<td>12:00:00 AM institution's local time on the first day (Sunday) of the week before the current week.</td>
</tr>
<tr>
<td>Beginning of this week</td>
<td>12:00:00 AM institution's local time on the first day (Sunday) of the current week.</td>
</tr>
<tr>
<td>7 Days Ago</td>
<td>12:00:00 AM institution's local time 7 days before the current day.</td>
</tr>
<tr>
<td>30 Days Ago</td>
<td>12:00:00 AM institution's local time 30 days before the current day.</td>
</tr>
<tr>
<td>60 Days Ago</td>
<td>12:00:00 AM institution's local time 60 days before the current day.</td>
</tr>
<tr>
<td>90 Days Ago</td>
<td>12:00:00 AM institution's local time 90 days before the current day.</td>
</tr>
<tr>
<td>NAME</td>
<td>DEFINITION</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Beginning of this month</td>
<td>12:00:00 AM institution’s local time on the first day of the current month.</td>
</tr>
<tr>
<td>Beginning of last month</td>
<td>12:00:00 AM institution’s local time on the first day of the month before the current month.</td>
</tr>
<tr>
<td>2 Months Ago</td>
<td>12:00:00 AM institution’s local time on the first day of the month that started 2 months before the current month.</td>
</tr>
<tr>
<td>3 Months Ago</td>
<td>12:00:00 AM institution’s local time on the first day of the month that started 3 months before the current month.</td>
</tr>
<tr>
<td>6 Months Ago</td>
<td>12:00:00 AM institution’s local time on the first day of the month that started 6 months before the current month.</td>
</tr>
<tr>
<td>9 Months Ago</td>
<td>12:00:00 AM institution’s local time on the first day of the month that started 9 months before the current month.</td>
</tr>
<tr>
<td>12 Months Ago</td>
<td>12:00:00 AM institution’s local time on the first day of the month that started 12 months before the current month.</td>
</tr>
<tr>
<td>Beginning of this year</td>
<td>12:00:00 AM institution’s local time on January 1 of the current year.</td>
</tr>
<tr>
<td>Beginning of last year</td>
<td>12:00:00 AM institution’s local time on January 1 of the year before the current year.</td>
</tr>
<tr>
<td>2 Years Ago</td>
<td>12:00:00 AM institution’s local time on January 1, 2 years ago.</td>
</tr>
</tbody>
</table>

To use relative dates:

1. In the Query Panel, create or locate the applicable date object in the Query Filters. Make sure that the filter type is set to ‘Prompt.’
2. Click the 'Show prompt properties' button to open the Prompt Properties menu.

3. At the top of the menu, select the 'Parameter from universe' radio button. Select one of the configured universe parameters. The definition will appear in the bottom box. Click OK.

4. If the date prompt is a range (e.g., start and end date), repeat steps 1 through 3 for the other prompt in the range, if desired.

   **Note:** You can also use relative dates in combination with ad-hoc prompts or constant values to create custom ranges. For example, if your library’s fiscal year runs from July to June, you could use a constant value of 1 July 2016 in the start date prompt and a relative end date of 'This morning' to create a fiscal-year-
to-date report:

5. When you are done, select the Run Queries button or select ‘Apply Changes and Close’ from the Close drop-down menu.

Remember to give your report a uniquely identifiable name when you save it to your institution’s shared folder or your My Favorites location.

**Note**: If you modify any existing WorldShare Report (i.e. standard, OCLC-provided reports) and replace the date prompt values with relative dates, the “Report Criteria” section will not reflect the calculated date. Instead, the date values may display as “All.” Giving your report a uniquely identifiable name is recommended to describe the selected time frame for the report.

**Report Designer: Four objects added to the Overlap universe**

Report Designer customers can now create reports that analyze knowledge base collections by four new objects:

- **Collection Owning Institution Name**: Organization that has selected part or all of a collection of titles in the WorldCat knowledge base.
- **Collection Source Institution Name**: Organization (i.e. OCLC, a library, etc.) that created or contributed a collection to the WorldCat knowledge base.
- **Collection Status**: Indicates if the collection is the original/global (raw), customized (overlay), or selected/shared (copy) version of a WorldCat knowledge base collection.
- **Collection Type**: The type of WorldCat knowledge base collection, e.g., Global, Local Copy, Local Customized, Private, and Shared.

**Note**: The refresh rate for the Overlap universe and the associated WorldCat knowledge base reports has been changed to allow for additional OCLC processing time. Data will be refreshed monthly on the 3rd of the month; after successful load, data will be “as of” the end of the previous calendar month.
Report Designer: Library of Congress Subclass Category improved

To simplify filtering and sorting, the Library of Congress Subclass Category dimension is now a concatenation of class and subclass in the LHR Item Detail universe.

<table>
<thead>
<tr>
<th>OCLC Number</th>
<th>Library of Congress Call Number</th>
<th>Library of Congress Class Category</th>
<th>Library of Congress Subclass Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>2441505</td>
<td>BF311</td>
<td>B</td>
<td>BF</td>
</tr>
<tr>
<td>6940989</td>
<td>BR877.F74</td>
<td>B</td>
<td>BR</td>
</tr>
<tr>
<td>6415579</td>
<td>B1</td>
<td>B</td>
<td>B</td>
</tr>
<tr>
<td>7535518</td>
<td>BX1493</td>
<td>B</td>
<td>BX</td>
</tr>
<tr>
<td>795790</td>
<td>BF637.N4</td>
<td>B</td>
<td>BF</td>
</tr>
<tr>
<td>7938509</td>
<td>BV4501.2</td>
<td>B</td>
<td>BV</td>
</tr>
<tr>
<td>9228413</td>
<td>BB170</td>
<td>B</td>
<td>BB</td>
</tr>
</tbody>
</table>

Report Designer: Institution Symbol added to four Circulation universes

Report Designer customers can now add their OCLC symbol to reports created from the Acquisitions, Cataloging, and E-Resources universes. OCLC symbols can be used in place of your institution's full name, allowing you to make better use of space.

Circulation Events:

- Event Billing Institution Symbol
- Event Institution Symbol
- Item Owner Institution Symbol
- Item Primary Institution Symbol
- Patron Institution Symbol

Circulation Hold Request:

- Hold Institution Symbol
- Hold Originator Institution Symbol
- Patron Institution Symbol
- Patron Proxy Institution Symbol

Circulation Item Status:

- Item Owning Institution Symbol
- Item Primary Institution Symbol
- Item Status Primary Institution Symbol
- Patron Institution Symbol
Circulation Patron Information

- Patron Institution Symbol

**Bug fixes**

**Monthly Circulation Statistics Report prompts**

The Monthly Circulation Statistics Report allowed for multiple values to be selected in the Begin Date and End Date prompts, causing the report to fail to run. After this release, single value selections will be enforced in both prompts.

**Report Designer: Institution shared folder display**

Users that opened the Report Launch Pad after opening at least one report directly from the Analytics tab could not see their institution’s shared folder, i.e. the folder for their institution symbol.

After this release, the shared folder will always display in the Report Launch Pad.

**Report Designer: Scheduling custom reports to My Files**

The ‘Destinations’ option in the scheduling menu was not available for reports saved in the institution shared folder or in My Favorites. After this release, these reports can be scheduled for pickup in My Files or via OCLC FTP.

**Important links**

**Post release sessions**

- 13 July 2017 at 2:00 pm, US Eastern (Standard) Time (GMT -04:00)
  Note that this month’s release overview will be combined with the [Product Insights session](https://www.oclc.org/community/WSAnalytics/events/14June2017.en.html).

**Community Roundtable: Working with Analytics & Report Designer**

- The recording of the 14 June 2017 session is available to view here: [https://www.oclc.org/community/WSAnalytics/events/14June2017.en.html](https://www.oclc.org/community/WSAnalytics/events/14June2017.en.html)

**Support website(s)**

Support information for this product and related products can be found at:

- [Browser compatibility chart](https://help.oclc.org/Library_Management/WorldShare_Reports/Release_notes_and_known_issues/2017_Releas...)
- [Release notes](https://help.oclc.org/Library_Management/WorldShare_Reports/Release_notes_and_known_issues/2017_Releas...)
- [OCLC Community Center](https://help.oclc.org/Library_Management/WorldShare_Reports/Release_notes_and_known_issues/2017_Releas...)
Future releases

- Visit the OCLC Community Center to view the roadmap for WorldShare Reports & Report Designer.

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