



WorldShare®

WorldShare® Analytics Create Multiple Universe Reports in WorldShare Report Designer Case Study Notes

This document, which accompanies the recorded training session of the same name, is intended to help you create multiple universe reports in WorldShare Report Designer by providing step-by-step instructions for replicating the case studies in the session.

Things to know before creating multiple universe reports

- Data in the OCLC data warehouse is stored in universes. Think of universes like folders or directories. Universes contain objects (dimensions and measures). Available universes include:
 - Acquisitions
 - Cataloging
 - Circulation Events
 - Circulation Fiscal Transactions
 - Circulation Hold Request
 - Circulation Item Status
 - Circulation Patron Information
 - Data Refresh Activity
 - E-Resources
 - Overlap
- In order to generate reports using data from multiple universes, there must be a common data point in each universe.
- OCLC number has different data types in different universes. It's a text string in the Acquisitions and Overlap > Title universes, and a number in other universes. Therefore OCLC number cannot be used as a match point between Acquisitions and Cataloging, for example. This issue will be resolved in a future release.
- In the ***cataloging*** universe ***only***:
 - Data is only available from July 2015 forward.
 - A report can include dimensions/measures from ***either*** Holding Information or Volatility Information, but not both.

Case study 1

Scenario

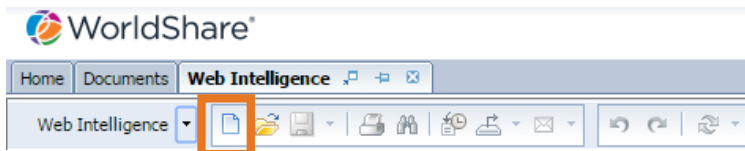
You want a list of new titles received in Acquisitions with a count of the number of times they have been checked out.

Steps

1. Login with a user name that has the Report Author role.
2. On the **Analytics** tab, click **Reports > Report Launch Pad**.
3. From the **Applications** menu, select **Web Intelligence**.



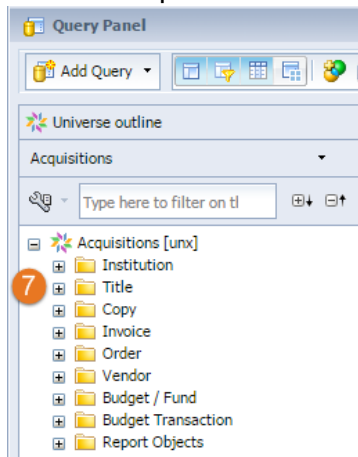
4. Click the **New** button.



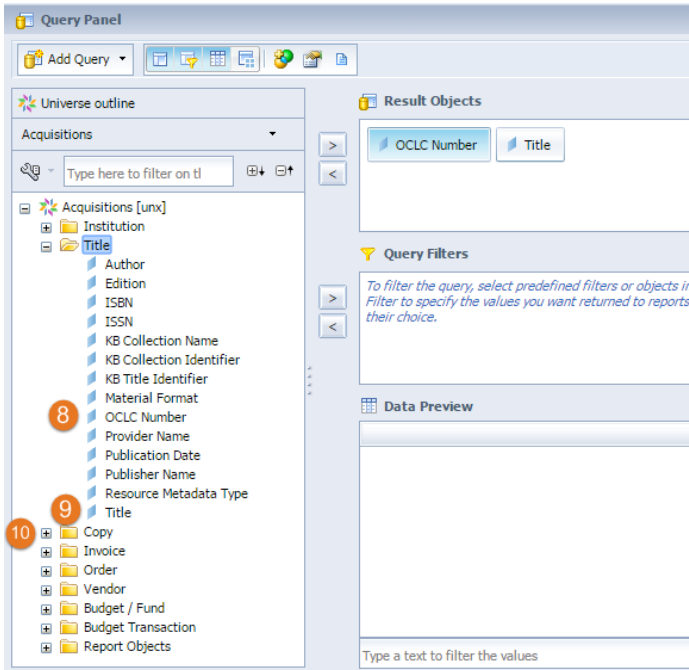
5. In the Create a document dialog: Click **Universe: Select a universe as a data source**. Click **OK**.
6. In the Universe dialog: Select **Acquisitions.unx**. Click **OK**.

In Query Panel, select dimensions to add to Result Objects:

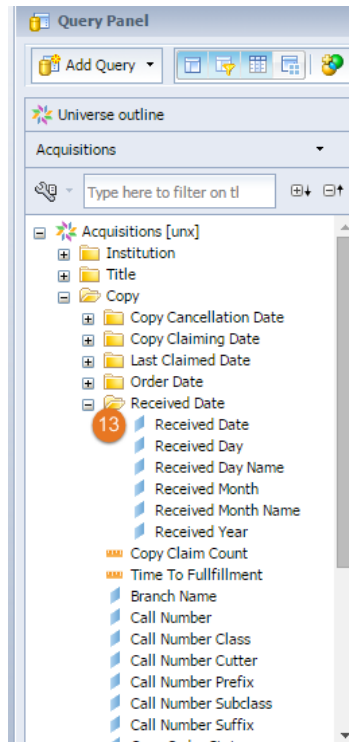
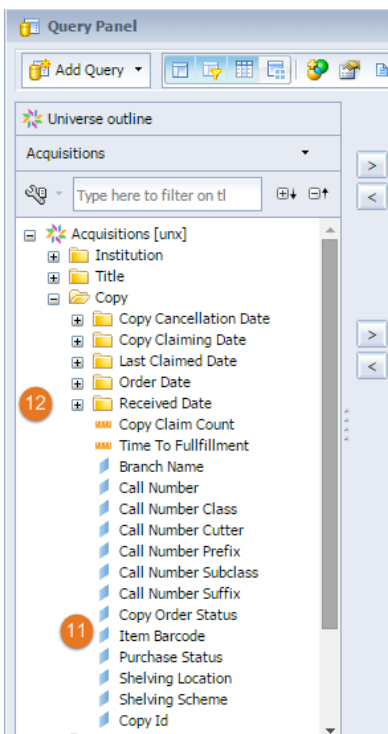
7. Click **+** to expand Title folder



8. Double-click **OCLC Number**,
9. Double-click **Title**.



10. Click **+** to expand Copy folder.
11. Double-click **Item Barcode**.



12. Click **+** to expand Received Date folder.
13. Double-click **Received Date**.

In Query Panel, select dimensions for Query Filters:

14. Drag received date from left panel
15. to Query Filters.
16. In Query Filters Panel, for Received Date, select **Between**.
17. For first date, enter **7/1/2014**.
18. For second date, enter today's date.
19. Drag item barcode from left panel to Query Filters.
20. For Item Barcode, select **Not Equal to**.
21. In **Type a constant** box, press the spacebar (if item doesn't have a barcode, we don't want it in our report).
22. In Data preview, click **Refresh**. Verify that desired data (OCLC Number, Title, Item Barcode, Received Date) is included.

The screenshot shows the Query Panel interface. On the left is the 'Universe outline' with a tree view of dimensions. The 'Query Filters' section contains two filters: 'Received Date' with a 'Between' operator and dates '7/1/2014 12:00:00 AM' and '11/25/2015 12:00:00 AM', and 'Item Barcode' with a 'Not Equal to' operator. The 'Data Preview' section shows a table with the following data:

OCLC Number	Title	Item Barcode	Received Date
45094111	Virtual teams : people work...	87597658678	2015/01/29 19:03:08
769425355	The first four notes : Beeth...	2456542545	2014/10/23 18:37:29
180752031	Beijing coma /	345345252455	2014/10/02 18:24:34
881386554	Beethoven : anguish and tri...	3452454525	2015/05/05 20:31:21
881064942	Thirteen soldiers : a person...	9786541467	2015/02/11 19:26:13
43302933	Gardening from seed : the k...	5245543543525	2015/02/20 14:59:19
857717689	Through the woods	000000009876	2015/05/05 18:46:28
860395376	Can't we talk about somethi...	34445533222444	2015/04/15 18:23:03
852222065	Words will break cement : t...	567876556879	2015/01/29 18:55:58
191758321	The New York Times crossw...	457467476	2015/01/29 19:02:35
191758321	The New York Times crossw...	4576547647	2015/01/29 19:02:38
76143564	Shadow of the Silk Road	3497	2015/01/29 19:01:51
62134773	Cesar's way : the natural, e...	2353545	2014/12/15 18:21:42
456551454	Imperfect birds	656356346	2015/01/29 19:00:54
879851784	How we got to now : six inn...	978357763	2015/02/11 19:24:52
251201707	Gabriel García Márquez : a l...	96879876	2014/12/15 18:21:49
213080882	Odd hours.	980798068	2014/12/15 18:22:11

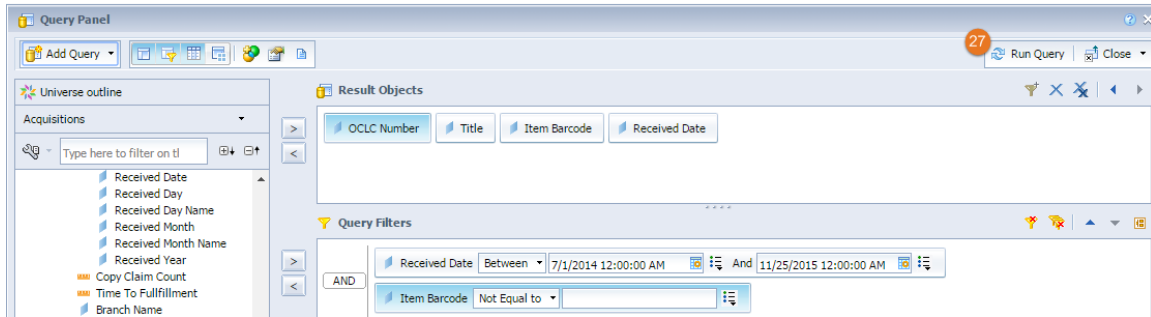
Rename the query:

23. Right-click **Query 1** tab at bottom of Query Panel.
24. Click **Rename**,
25. In New value, type **Acq**.
26. Click **OK**.

The screenshot shows the 'Query 1' tab in the Query Panel. A context menu is open over the tab, with the 'Rename' option highlighted. The number 24 is overlaid on the 'Rename' option.

The screenshot shows the 'Rename query' dialog box. The 'Current value' field contains 'Query 1' and the 'New value' field contains 'Acq'. The 'OK' button is highlighted with a red circle and the number 26.

27. Click **Run Query**. Data appears in report panel.



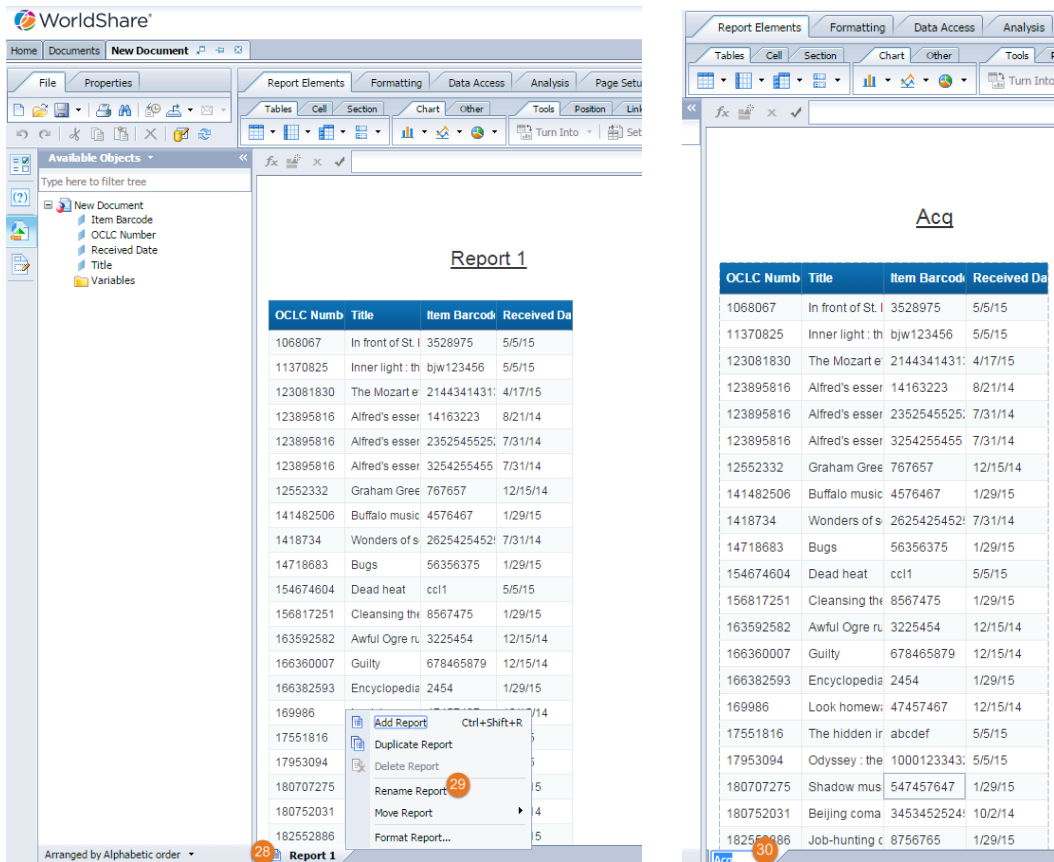
Rename the Report:

28. Right-click **Report 1** tab at bottom of report panel.

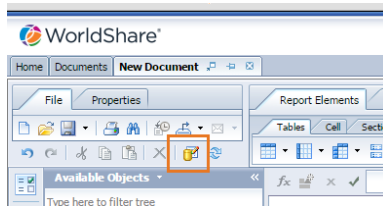
29. Click **Rename Report**.

30. Type **Acq**.

31. Press <Enter>.



32. Click **Edit Data Provider**



33. In Query Panel, Click **Add Query > From the universe.**



34. In Add Query dialog, select **Circulation Events.unx**. Click **OK**.

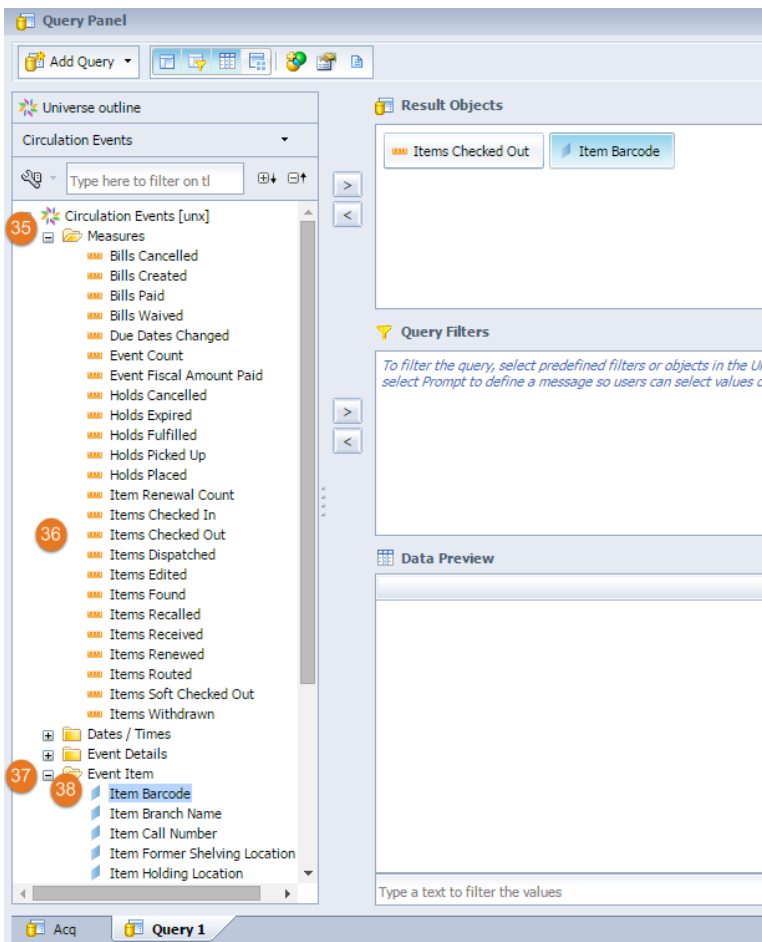
In Query Panel, select dimensions and measures to add to Result Objects:

35. Click **+** to expand Measures folder.

36. Double-click **Items Checked Out**.

37. Click **+** to expand Event Item,

38. Double-click **Item Barcode**.



In Query Panel, select dimensions and measures for Query Filters:

Set Event Dates filter:

39. Click **+** to expand **Dates / Times** folder.

40. Click **+** to expand **Event Dates**.

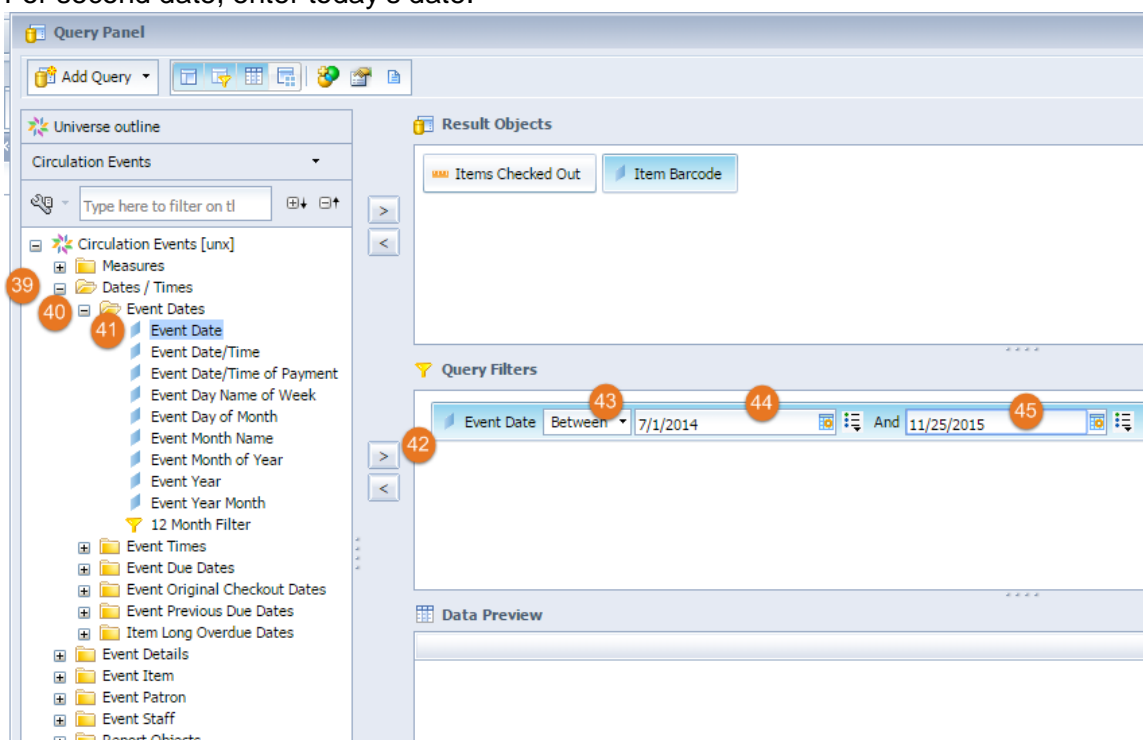
41. **Drag Event Date**

42. to **Query Filters**.

43. In Event Date, select **Between**.

44. For first date, enter **7/1/2014**.

45. For second date, enter today's date.



Set Item Barcode filter:

46. Click **+** to expand **Event Item** folder,

47. Drag **Item Barcode**

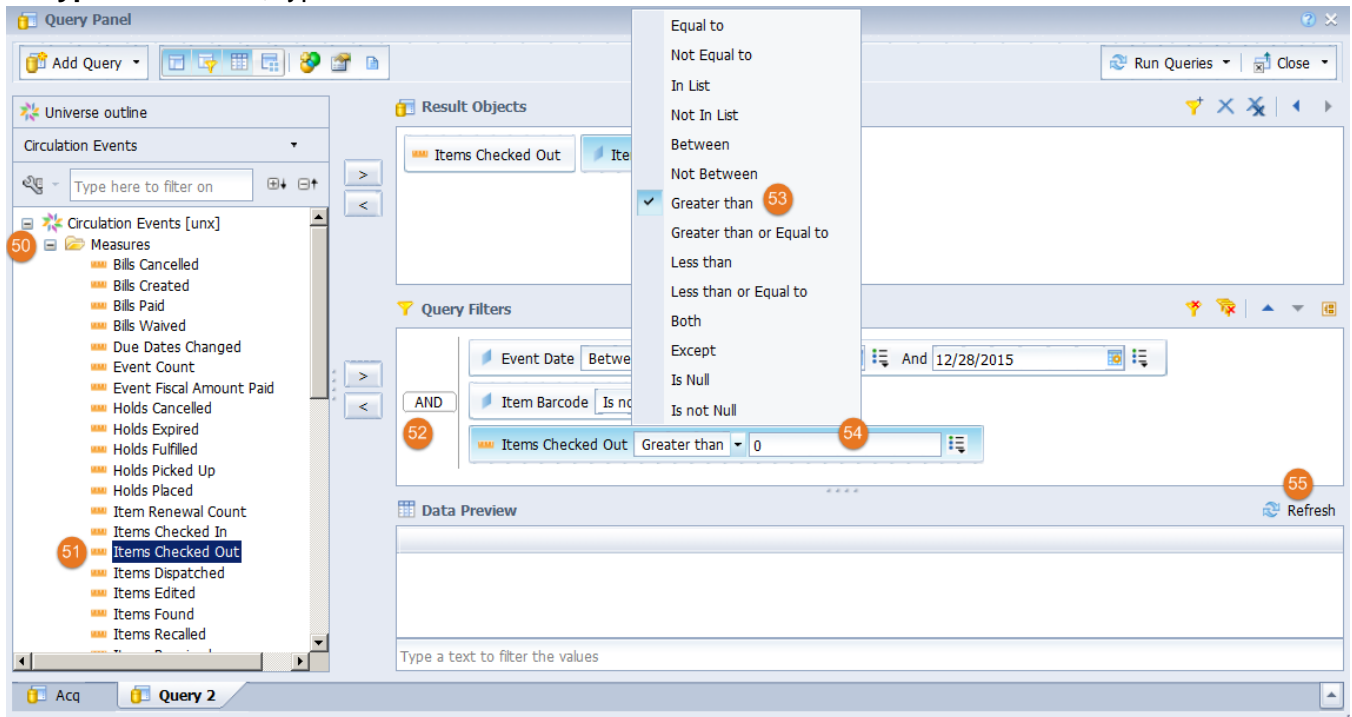
48. to Query Filters.

49. For Item Barcode, select **is not Null**.

The screenshot shows the Query Panel interface with the following components:

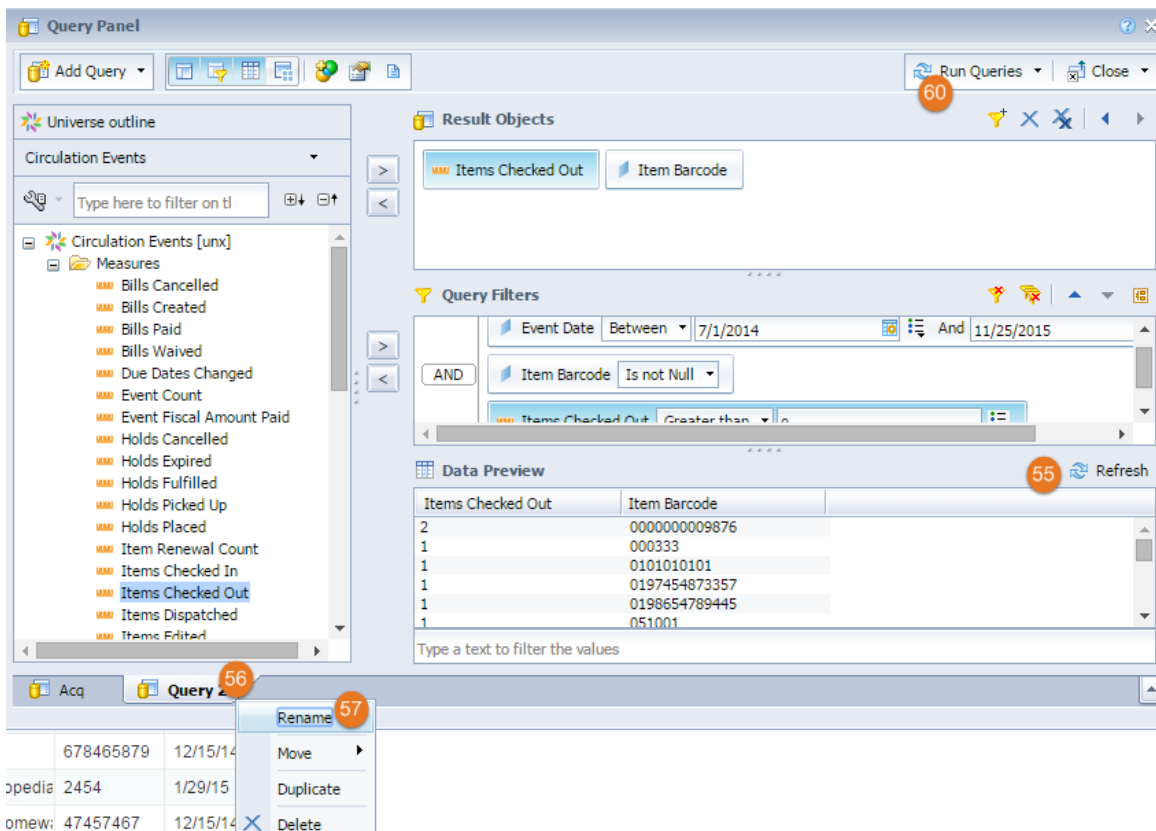
- Universe outline:** A tree view on the left showing the hierarchy of data objects. The 'Event Item' folder is expanded, and 'Item Barcode' is selected. Red circles with numbers 46 and 47 indicate the expansion and selection actions.
- Result Objects:** A panel on the right showing 'Items Checked Out' and 'Item Barcode'.
- Query Filters:** A panel in the center showing a filter for 'Event Date' (Between 7/1/2014 and 11/25/2015) and a filter for 'Item Barcode' (In List). A red circle with the number 48 is next to the 'Item Barcode' filter.
- Filter Selection Menu:** A dropdown menu is open for the 'Item Barcode' filter, showing various comparison operators. The 'Is not Null' option is highlighted with a red circle and the number 49.
- Data Preview:** A panel at the bottom showing a table of data.

- Set Items Checked Out Filter:
50. Click **+** to expand **Measures** folder,
 51. Drag **Items Checked Out**
 52. to Query Filters.
 53. For Items Checked Out, select **Greater than**.
 54. In **Type a constant**, type **0**.

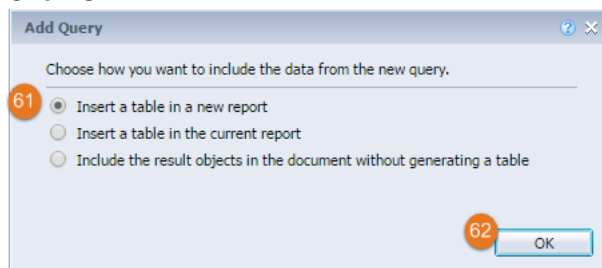


55. In Data preview, click **Refresh**. Verify that desired data elements (Items Checked Out, Item Barcode) are included, and Items Checked Out for each row is greater than or equal to 1.

- Rename the query:
56. Right-click **Query 2** tab at bottom of Query Panel.
 57. Click **Rename**,
 58. In New value, type **Circ**.
 59. Click **OK**.
 60. Click **Run Queries**.



- In the Add Query dialog, choose how you want to include the data from the new query.
61. Select **Insert a table in a new report**.
 62. Click **OK**.



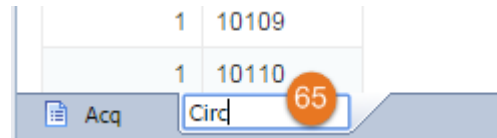
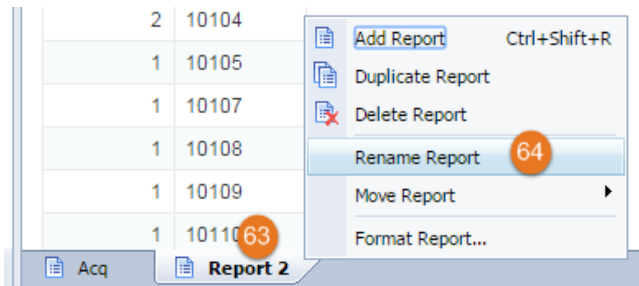
Rename the report:

63. Right-click **Report 2** tab at bottom of report panel.

64. Click **Rename Report**,

65. Type **Circ**.

66. Press <Enter>.



Merge reports:

67. Right-click on either of the two report tabs (**Acq** or **Circ**).

68. Click **Add Report**.

69. At top of window, select **Data Access > Data Objects > Merge**.

The screenshot shows a software window with a menu bar (Report Elements, Formatting, Data Access, Analysis, Page Setup) and a toolbar (Data Providers, Data Objects). The main area displays a report titled "Circ" with a table of items. A context menu is open over the "Circ" tab, highlighting "Add Report" (68). The "Data Objects" menu is open at the top, highlighting "Merge" (69). The "Acq" tab is highlighted at the bottom (67).

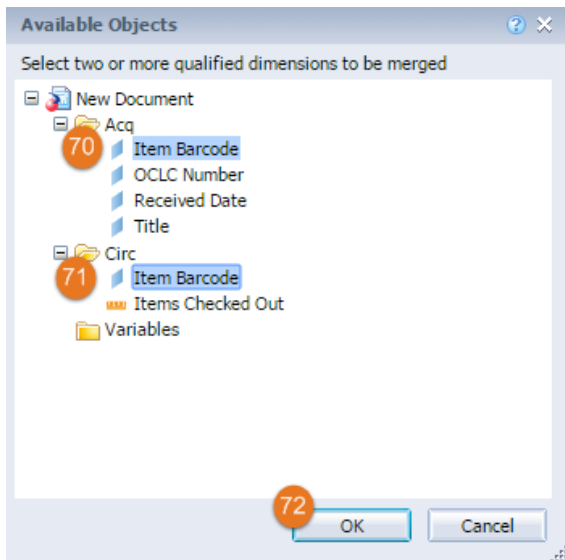
Items Check	Item Barcode
2	0000000094
1	000333
1	0101010101
1	0197454873
1	0198654789
1	051001
1	0529002
1	1
1	1000540699
1	1000976437
1	1001122333
2	100123456
1	10100
2	10101
1	101010
2	10104
1	10105
1	10107
1	10108
1	10109
1	10110

In Available Objects dialog:

70. Single-click **Acq > Item Barcode**.

71. Control-click to select **Circ > Item Barcode**.

72. Click **OK**.



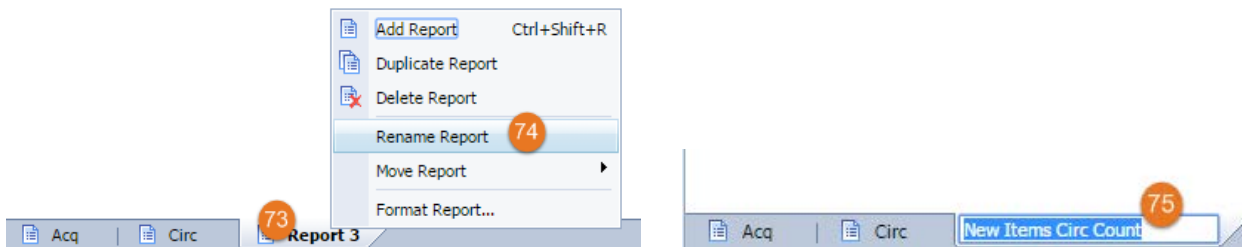
Rename the report:

73. Right-click **Report 3** tab at bottom of report panel.

74. Click **Rename Report**.

75. Type **New Items Circ Count**.

76. Press <Enter>.



Select the dimensions and measures for the New Items Circ Count report:

77. If necessary, click **Available Objects**.

78. Click **Item Barcode** (click the “parent” Item Barcode, not the individual Item Barcode (Acq) and Item Barcode (Circ)).

79. Shift-click **Title**.

80. Shift-click **Items Checked Out**.

81. All of these dimensions and measures selected in the previous step should now be highlighted. Drag them all from Available Objects to the report panel on the right. Rather than dragging them to the title area (indicated by a dotted-outline box at the top), be careful to drag them to the body of the report.

The screenshot shows the report builder interface. The Available Objects panel on the left lists the following objects: Item Barcode (78), OCLC Number, Received Date, Title (79), Items Checked Out (80), and Variables. The report body is divided into a Title area (dotted outline) and a Body area (solid outline). An orange arrow points from the Available Objects panel to the Body area. A red prohibition sign is over the Title area. A table of data is shown at the bottom right.

Item Barcode	Title	Items Check
0000000009	Through the v	2
0101010101	Sarah's key	1
09876	Singing lessc	
1000123343	Odyssey : the	
1001122333	Prodigal sons	1
100123456	Phiz 93 : the v	2
1123	A deeper slee	
1215445599	Plants	2
1234590	Big little lies	
124255325	Brahms trios	
124564753	Boy, snow, bi	1
124566755	Planes	

Sort by the Items Checked Out column, so that items checked out 1 or more times are at the top of the report:

82. Right-click in a data cell of **Items Checked Out**.

83. Click **Sort > Advanced**.

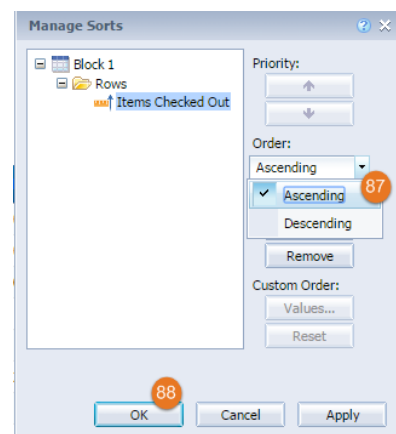
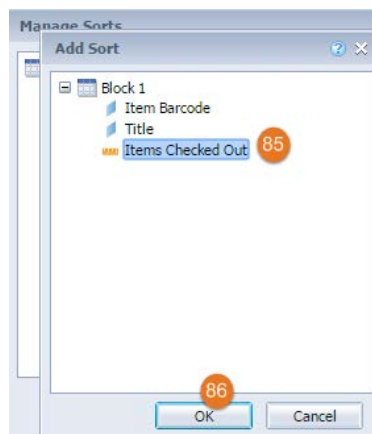
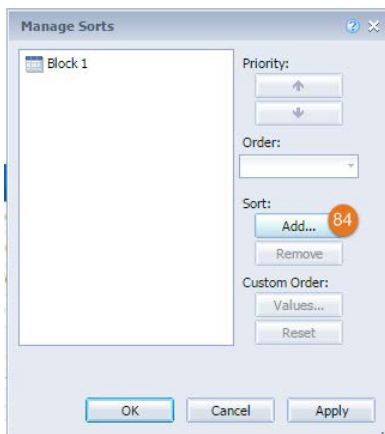
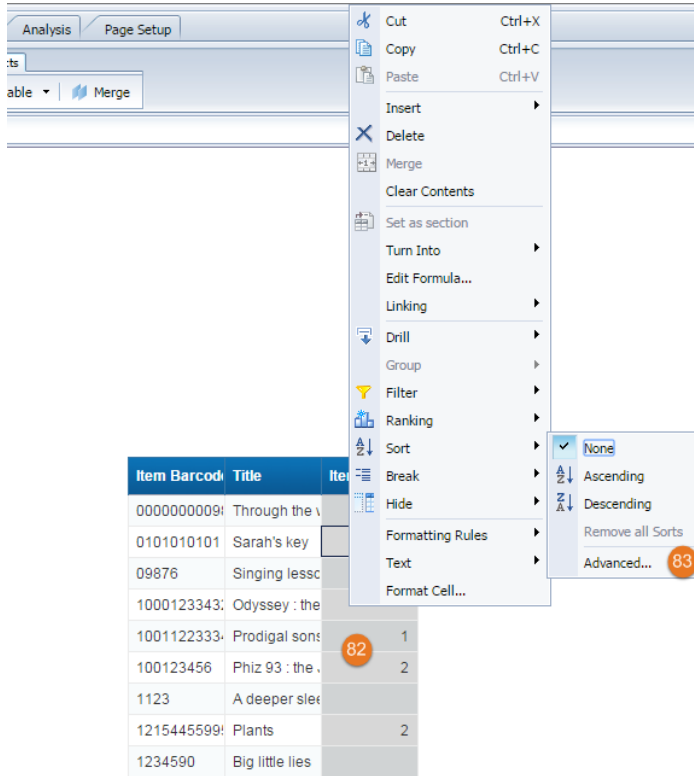
84. In **Manage Sorts** dialog, click **Add**.

85. In Add Sort dialog, select **Items Checked Out**.

86. Click **OK**.

87. In Manage Sorts dialog, select **Order > Ascending**.

88. Click **OK**.



Resize columns and wrap text as needed:

89. Click in a data cell of the **Title** column.

90. Click **Formatting**.

91. Click **Size**.

92. Type or select a number for **Width**. (Alternatively, you can drag the column divider to the desired width).

Item Barcode	Title	Items Check
0101010101	Sarah's key	1
1001122333	Prodigal sons and material girls : how not to	1
124564753	Boy, snow, bird : a novel	1
134151345	The complete short stories of Mark Twain	1
14163018	James Taylor	1
14163119	The World's best piano arrangements 100 g	1
1446611455	Artwork	1
3154345425	Beethoven : anguish and triumph : a biogra	1
32525452	Caleb's crossing	1
341545425	Theoretical and computational inorganic ch	1
4574576477	Inferno : a novel	1
0000000009	Through the woods	2
100123456	Phiz 93 : the John Kobal Foundation Indepe	2

93. With the data cells in the **Title** column selected, click **Formatting** > **Alignment**.

94. Click the **Wrap Text** button.

Item Barcode	Title	Items Check
0101010101	Sarah's key	1
1001122333	Prodigal sons and material girls : how not to	1
124564753	Boy, snow, bird : a novel	1
134151345	The complete short stories of Mark Twain	1
14163018	James Taylor	1
14163119	The World's best piano arrangements 100 g	1
1446611455	Artwork	1
3154345425	Beethoven : anguish and triumph : a biogra	1

Wrap text in the column headers:

95. Click in the **Item Barcode** header cell.

96. Shift-click in the **Items Checked Out** header cell.

97. Click **Formatting > Alignment**.

98. Click the **Wrap Text** button.

Item Barcode	Title	Items Check
0101010101	Sarah's key	1
1001122333	Prodigal sons and material girls : how not to be your child's atm	1
124564753	Boy, snow, bird : a novel	1
134151345	The complete short stories of Mark Twain	1
14163018	James Taylor	1
	The World's best piano arrangements 100 golden standards arranged by the	

99. Save, export, or print the report as needed.

Case study 2

Scenario

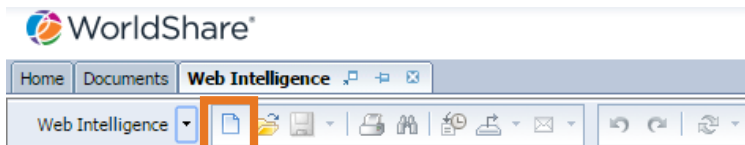
For each patron borrower category, you want to know the percentage of patrons in that category who have checked out at least one item during a specified time period (active patrons), and the average number of items checked out per active patron.

Steps

1. Login with a user name that has the Report Author role.
2. On the **Analytics** tab, click **Reports > Report Launch Pad**.
3. From the **Applications** menu, select **Web Intelligence**.



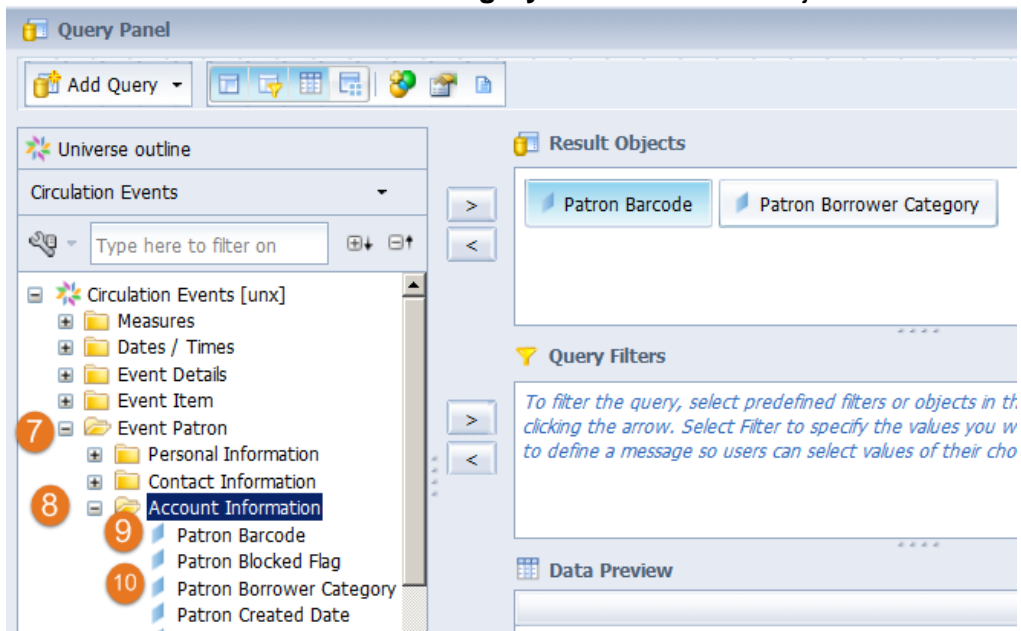
4. Click the **New** button.



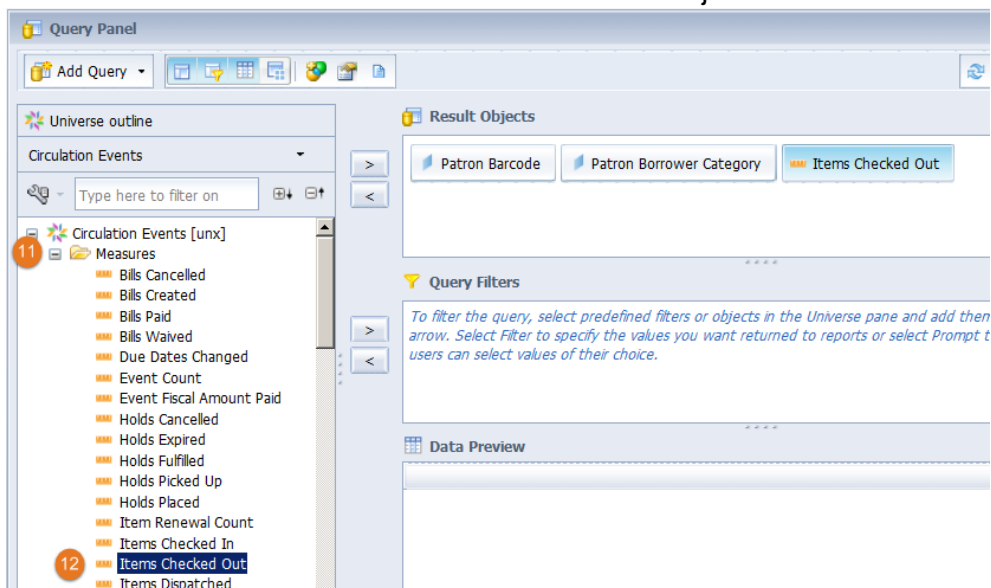
5. In the Create a document dialog: Click **Universe: Select a universe as a data source**. Click **OK**.
6. In the Universe dialog: Select **Circulation Events.unx**. Click **OK**.

In Query Panel, select dimensions to add to Result Objects:

7. Click **+** to expand **Event Patron**.
8. Click **+** to expand **Account Information**.
9. Double-click **Patron Barcode** to add to Result Objects.
10. Double-click **Patron Borrower Category** to add to Result Objects.



11. Click **+** to expand **Measures**.
12. Double-click **Items Checked Out** to add to Result Objects.

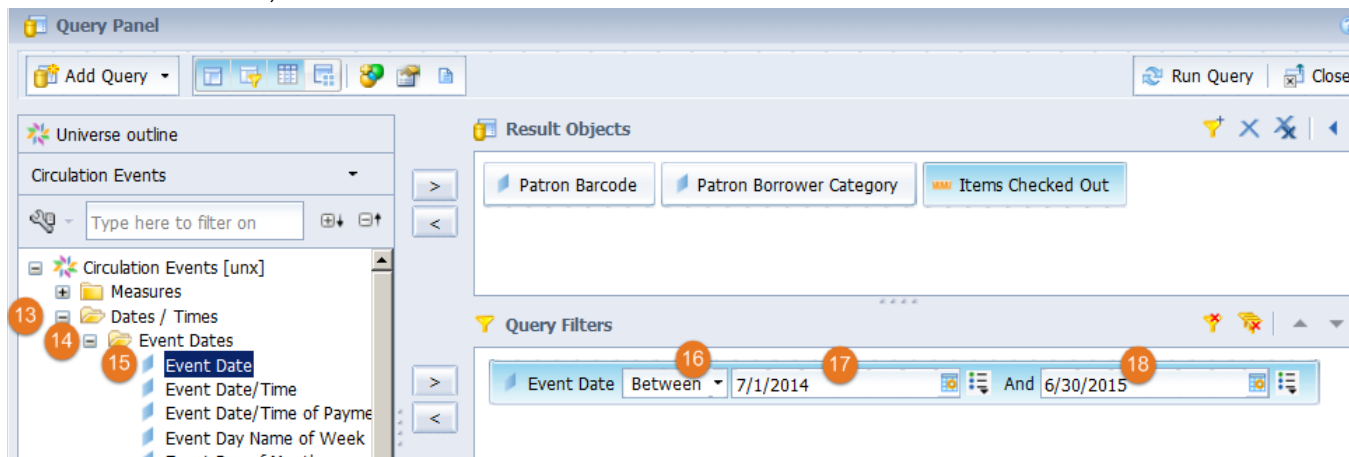


In Query Panel, select Query Filters:

13. Click **+** to expand **Dates / Times**.

Set Query Filter for Event Date:

14. Click **+** to expand **Event Dates**.
15. Drag **Event Date** to Query Filters.
16. In Query Filters Panel, for Event Date, select **Between**,
17. For first date, enter **7/1/2014**.
18. For second date, enter **6/30/2015**.




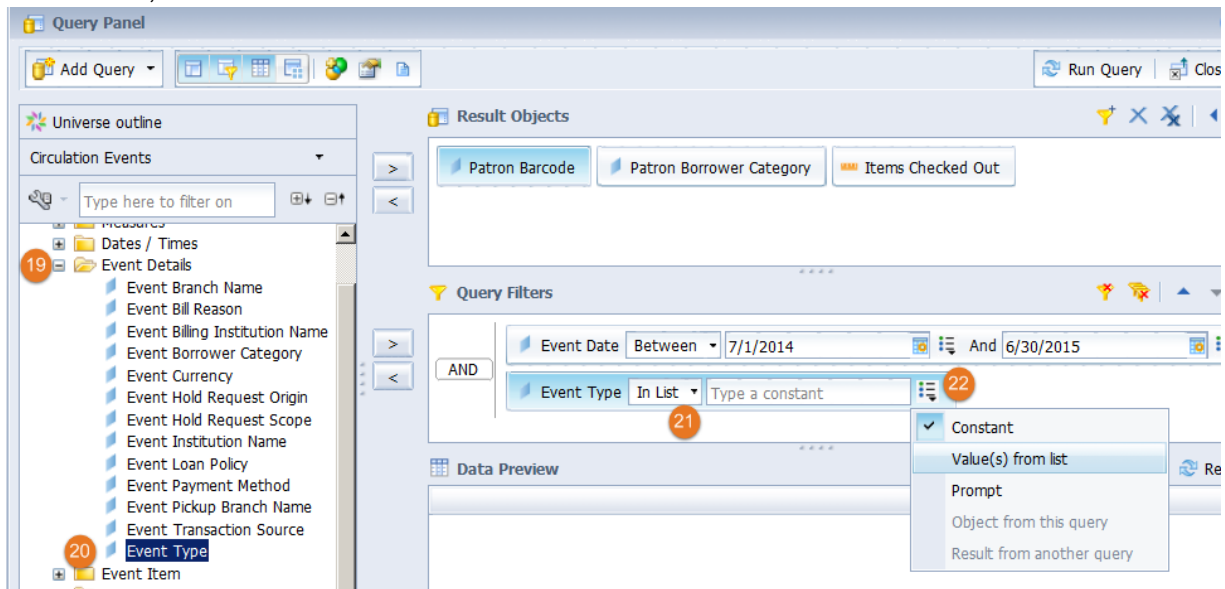
Set Query Filter for Event Type:

19. Click **+** to expand **Event Details**.

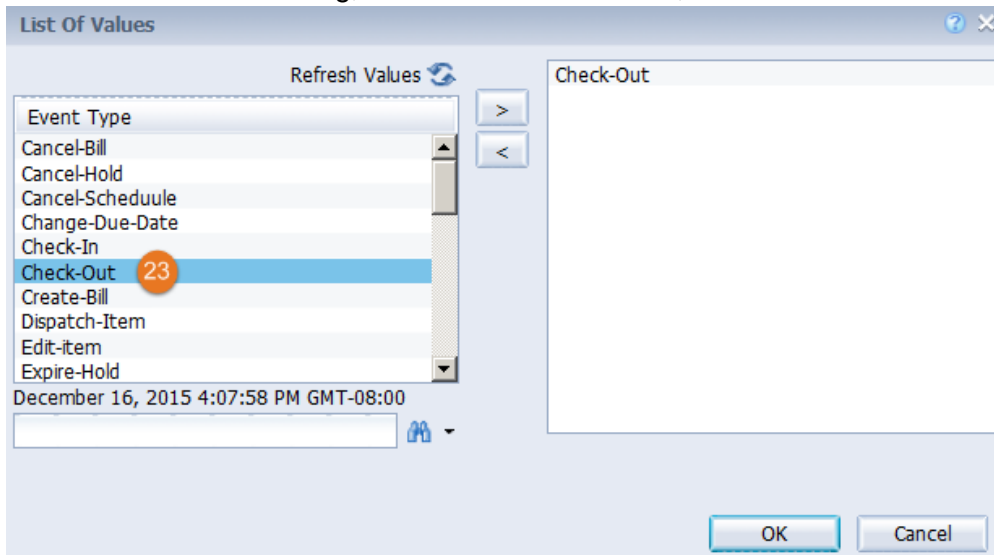
20. Drag **Event Type** to Query Filters,

21. In Query Filters Panel, for Event Type, select **In List**.

22. Click ; then select **Values from List**.



23. In the List of Values dialog, double-click **Check Out**; then click **OK**.



24. In Data preview, click **Refresh**. Verify that desired data (Patron Barcode, Patron Borrower Category, Items Checked Out) is included.

The screenshot shows the Query Panel interface. On the left is the 'Universe outline' with 'Event Type' selected. The 'Query Filters' section shows 'Event Date' between 7/1/2014 and 6/30/2015, and 'Event Type' set to 'Check-Out'. The 'Data Preview' table is as follows:

Patron Barcode	Patron Borrower Category	Items Checked Out
0000000001	Student	1
060314001	Student	3
071500	Student	1
1000000003	Student	2
101010	Student	3

A red circle with the number 24 highlights the 'Refresh' button in the top right corner of the Data Preview section.

Rename the query:

25. Right-click **Query 1** tab at bottom of Query Panel.
26. Click **Rename**.

This screenshot shows the same Query Panel interface as above, but with a context menu open over the 'Query 1' tab at the bottom. The menu options are 'Rename', 'Move', and 'Duplicate'. A red circle with the number 25 is over the 'Query 1' tab, and another red circle with the number 26 is over the 'Rename' option.

27. In New value, type **Checkouts**.
28. Click **OK**.

29. Click **Run Query**. Data appears in report panel.

Rename the Report:

30. Right-click **Report 1** tab at bottom of report panel.

31. Click **Rename Report**.


The screenshot shows the WorldShare interface. On the left, the 'Available Objects' pane lists 'New Document', 'Patron Barcode', 'Patron Borrower Category', 'Items Checked Out', and 'Variables'. The main area displays a report titled 'Report 1' with a table of data. A context menu is open over the 'Report 1' tab at the bottom, with 'Rename Report' highlighted. A red circle with the number '31' is placed over the 'Rename Report' option. Another red circle with the number '30' is placed over the 'Report 1' tab. The table data is as follows:

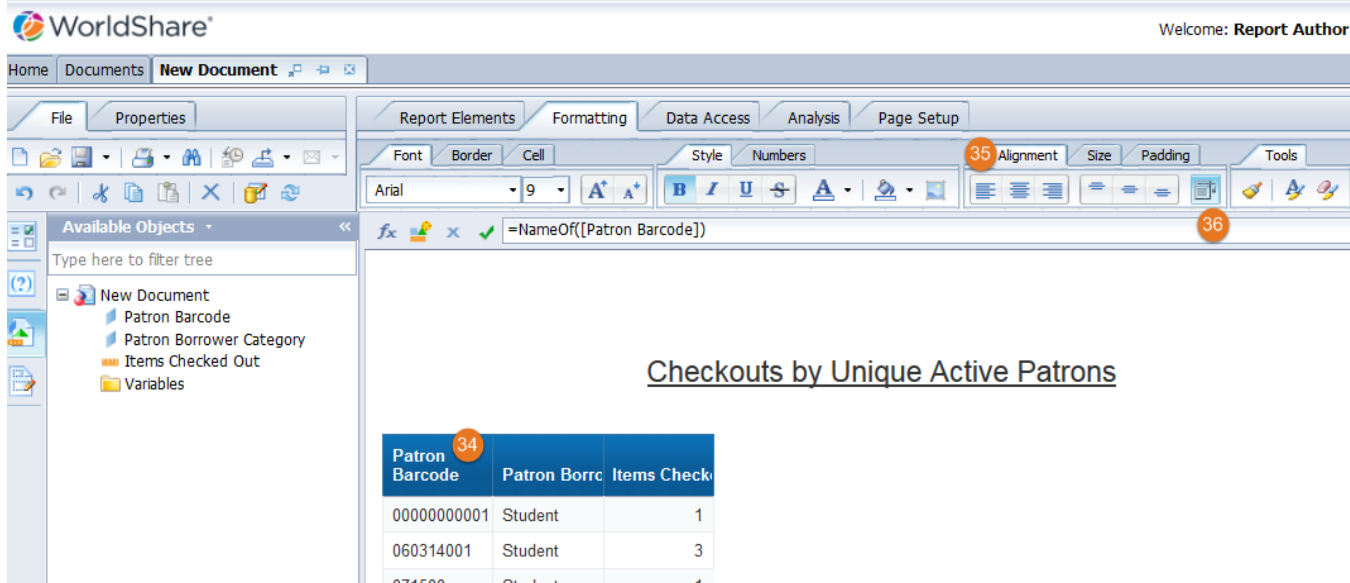
Patron Barcode	Patron Borrower Category	Items Checked Out
00000000001	Student	1
060314001	Student	3
071500	Student	1
1000000003	Student	2
101010	Student	3
11	Faculty	2
1100994	Student	3
111	Adult	5
124598	Faculty	4
14890	Student	3
15102001	Student	1
1777700125	Student	2
18772	Student	5
188801700		
1888800102		
1888800134		
1888800203		
1888800393		

32. Type **Checkouts by Unique Active Patrons**.

33. Press <Enter>.

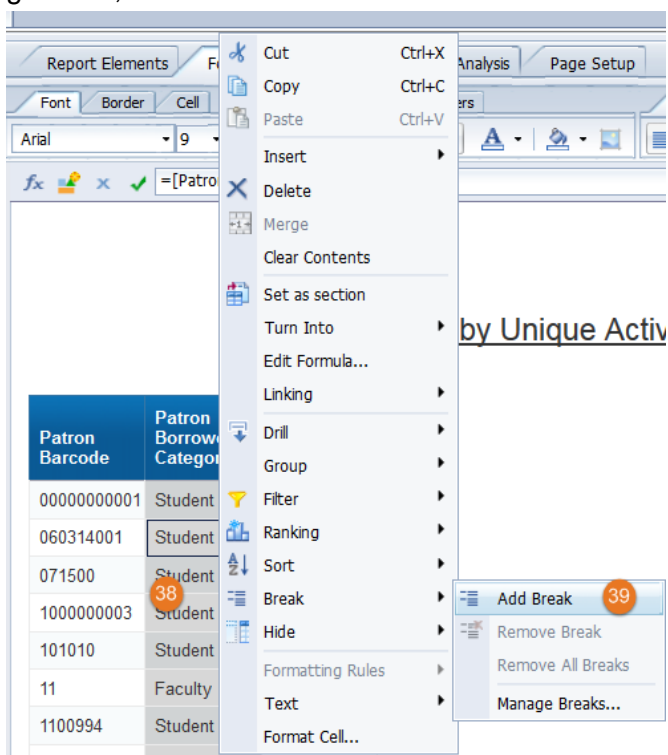
- Format column headers:
34. Click header cell of first column (Patron Barcode),
 35. Click **Formatting > Alignment**;

36. Then click the Wrap text button .
37. Repeat for each column header.



Insert breaks and subtotals:

38. Click in a data cell of the **Patron Borrower Category** column.
39. Right-click, then click **Break > Add Break**.



40. Click in a data cell of the **Patron Barcode** column.
41. Click **Analysis** >
42. **Functions** >
43. **Count**.

Report Elements | Formatting | Data Access | Analysis | Page Setup

Filters | Data Tracking | Display | Conditional | Interact | Functions

Filter | Ranking | Input Controls | Group | Break | Sort | Sum | Count | More

fx | x | ✓ | = [Patron Barcode]

Checkouts by Unique Active Patrons

Patron Barcode	Patron Borrower Category	Items Checked Out
00000000001	Student	1
060314001	Student	3
071500	Student	1
10000000003	Student	2
101010	Student	3

44. Click in a data cell of the **Items Checked Out** column.
45. Click **Analysis** > **Functions** > **Sum**.

Report Elements | Formatting | Data Access | Analysis | Page Setup

Filters | Data Tracking | Display | Conditional | Interact | Functions

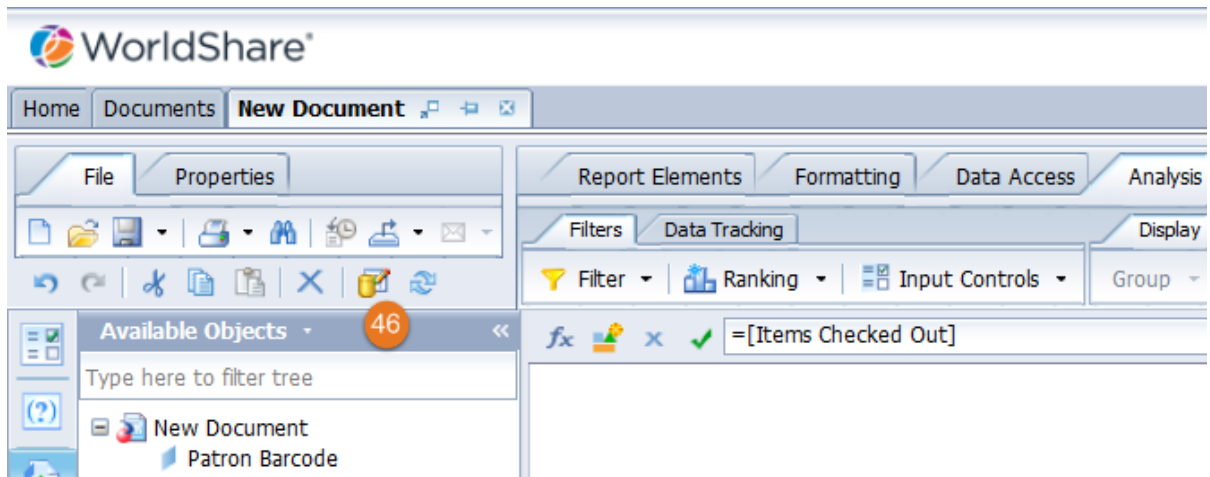
Filter | Ranking | Input Controls | Group | Break | Sort | Sum | Count | More

fx | x | ✓ | = [Items Checked Out]

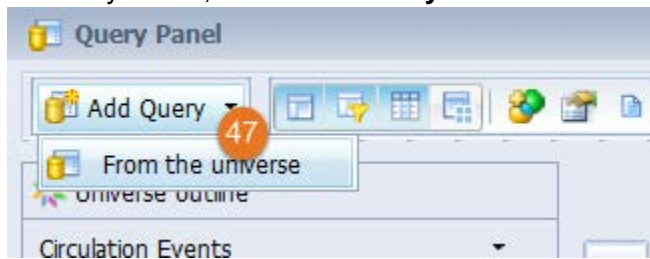
Checkouts by Unique Active Patrons

Patron Barcode	Patron Borrower Category	Items Checked Out
00000000001	Student	1
060314001	Student	3

46. Click **Edit Data Provider** .



47. In Query Panel, Click **Add Query > From the universe.**



48. In Add Query dialog, select **Circulation Patron Information.unx**. Click **OK**.

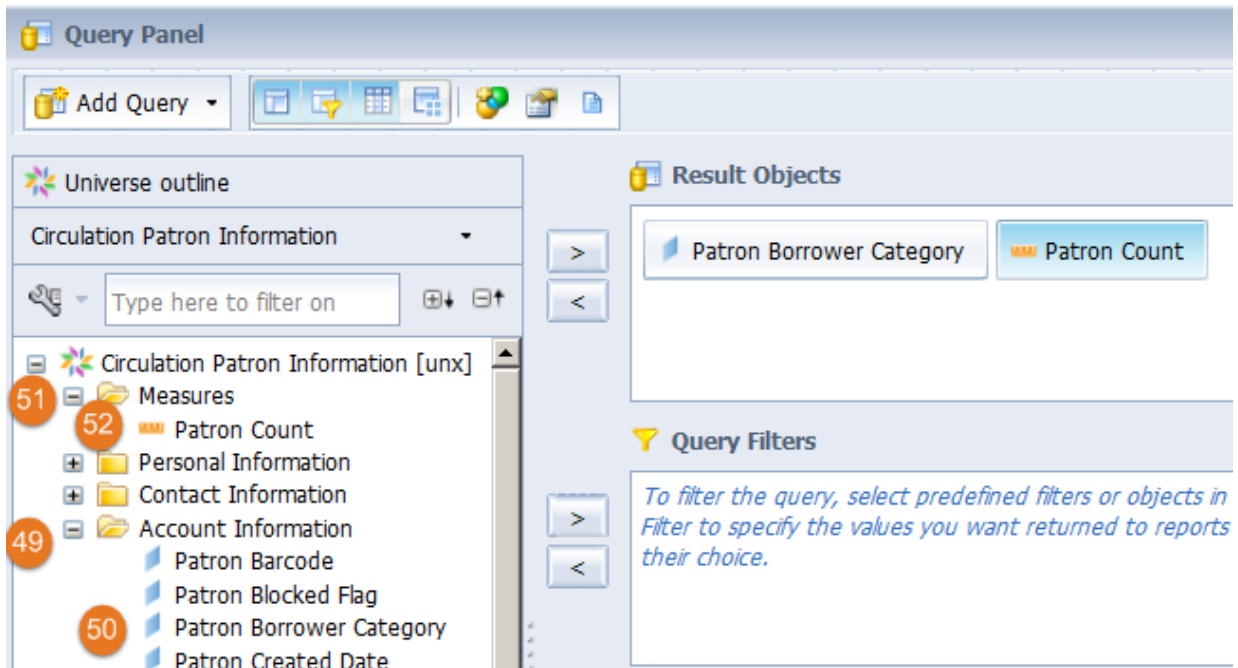
In Query Panel, select dimensions and measures to add to Result Objects:

49. Click **+** to expand **Account Information** folder.

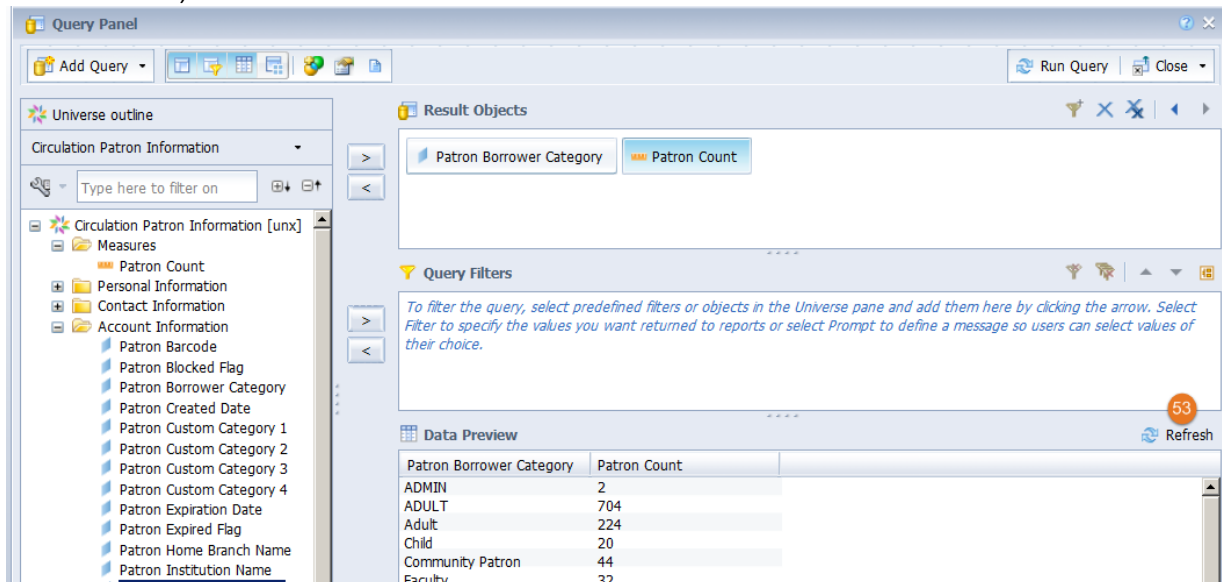
50. Double-click **Patron Borrower Category**.

51. Click **+** to expand **Measures** folder.

52. Double-click **Patron Count**.



53. In Data Preview, panel click **Refresh**. Verify that desired data (Patron Borrower Category, Patron Count) is included.



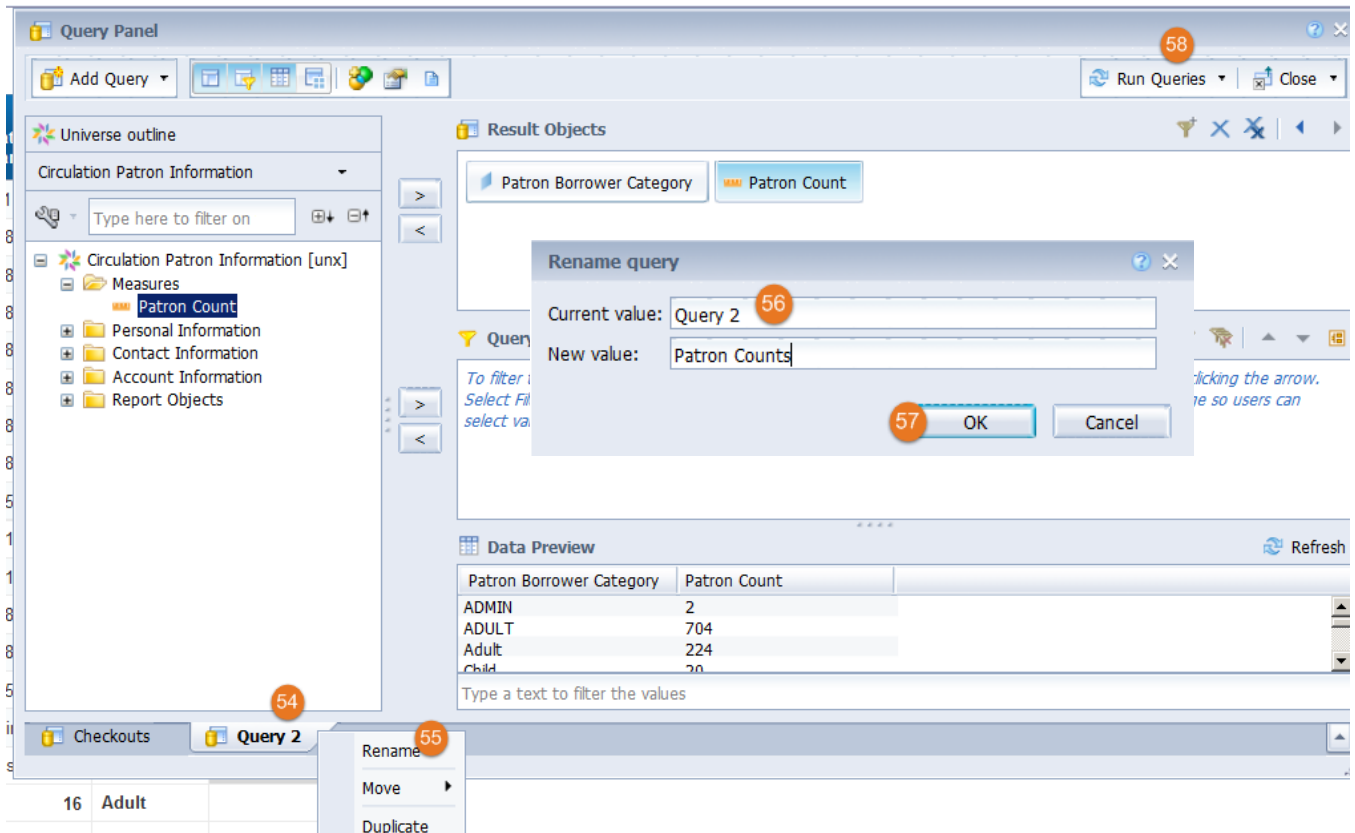
Rename the query:

54. Right-click **Query 2** tab at bottom of Query Panel.

55. Click **Rename**.

56. In New value, type **Patron Counts**.

57. Click **OK**.

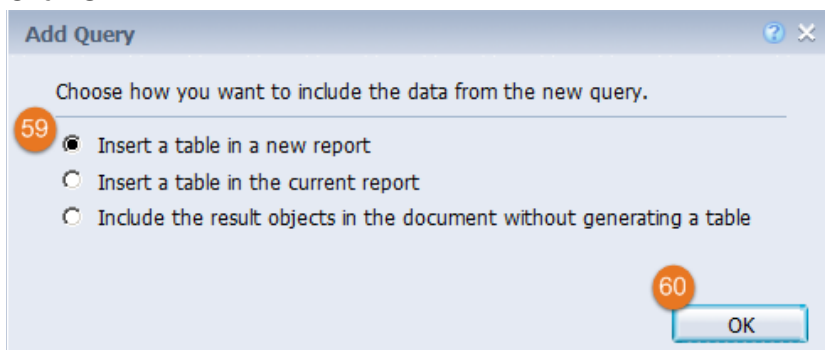


58. Click **Run Queries**.

In the Add Query dialog, choose how you want to include the data from the new query:

59. Select **Insert a table in a new report**.

60. Click **OK**.



Rename the report:

61. Right-click **Report 2** tab at bottom of report panel.

62. Click **Rename Report**.

The screenshot shows a report titled "Report 2" with a table of Patron Counts. The table has two columns: "Patron Borrc" and "Patron Coun". The data rows are as follows:

Patron Borrc	Patron Coun
ADMIN	2
Adult	224
ADULT	704
Child	20
Community P	44
Faculty	32
Friends of the	6
N/A	1
Staff	88
Student	99
Undergraduat	17
Young Adult	9

At the bottom of the report panel, there are two tabs: "Checkouts by Unique Active Patrons" and "Report 2". A right-click context menu is open over the "Report 2" tab, with the "Rename Report" option highlighted. A red circle with the number "62" is placed over the "Rename Report" option. Another red circle with the number "61" is placed over the "Report 2" tab.

63. Type **Patron Counts**.

64. Press <Enter>.

The screenshot shows the report panel tabs. The "Report 2" tab has been renamed to "Patron Counts". A red circle with the number "63" is placed over the "Patron Counts" tab.

Merge reports:

65. Right-click on either of the two report tabs (**Checkouts by Unique Active Patrons** or **Patron Counts**).

66. Click **Add Report**.

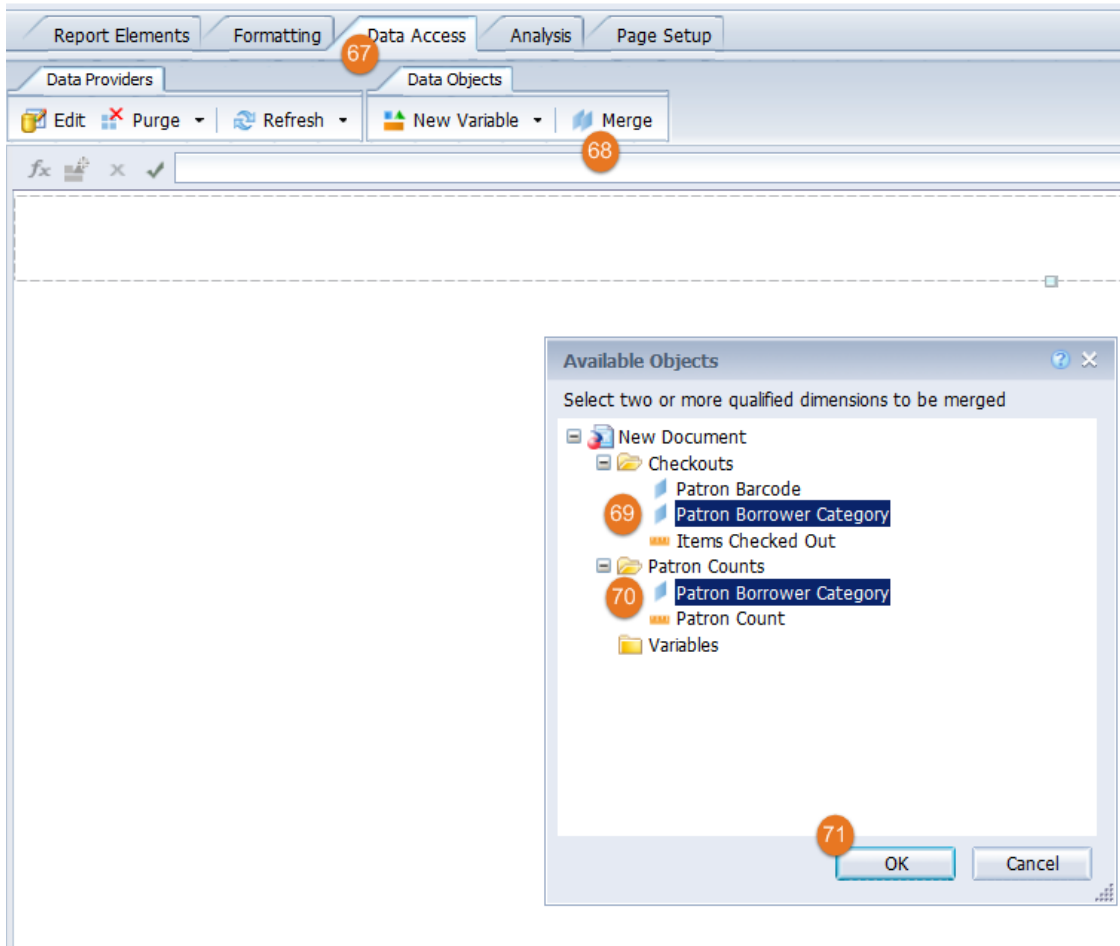
The screenshot displays a web application interface for 'Patron Counts'. At the top, the title 'Patron Counts' is centered. Below it is a table with two columns: 'Patron Borrower' and 'Patron Count'. The table lists various patron categories and their corresponding counts. At the bottom of the interface, there are two report tabs: 'Checkouts by Unique Active Patrons' and 'Patron Counts'. The 'Patron Counts' tab is active and highlighted. A context menu is open over the 'Patron Counts' tab, with the 'Add Report' option selected and highlighted in blue. The 'Add Report' option includes a keyboard shortcut 'Ctrl+Shift+R'. Other options in the menu include 'Duplicate Report', 'Delete Report', 'Rename Report', 'Move Report', and 'Format Report...'. The number '65' is circled in orange above the 'Patron Counts' tab, and the number '66' is circled in orange above the 'Add Report' menu item.

Patron Borrower	Patron Count
ADMIN	2
Adult	224
ADULT	704
Child	20
Community P	44
Faculty	32
Friends of the	6
N/A	1
Staff	88
Student	99
Undergraduate	17
Young Adult	9

67. At top of window, select **Data Access > Data Objects >**
68. **Merge.**

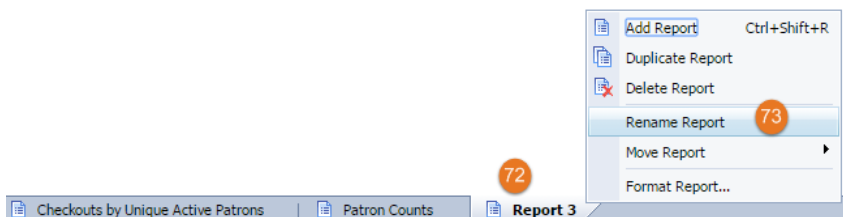
In Available Objects dialog:

69. Single-click **Checkouts > Patron Borrower Category.**
70. Control-click to select **Patron Counts > Patron Borrower Category.**
71. Click **OK.**



Rename the report:

72. Right-click **Report 3** tab at bottom of report panel.
73. Click **Rename Report.**
74. Type **Active Patron Summary.**
75. Press <Enter>.



Select dimensions and measures to include in the report:

76. If the Available Objects panel is not open, click the **Available Objects** button.

77. Click **Patron Barcode**.

78. Shift-click **Patron Count**.

79. All of these dimensions and measures selected in the previous step (Patron Barcode, Patron Borrower Category, Items Checked Out, Patron Count) should now be highlighted. Drag them as a group from Available Objects to the report panel on the right (be careful to drag them to the body of report, not the title area, which is indicated by a dotted-outline box at the top).

The screenshot shows the WorldShare software interface. The 'Available Objects' panel on the left lists several objects under the folder '20151228': 'Patron Barcode' (77), 'Patron Borrower Category' (76), 'Items Checked Out' (78), and 'Patron Count' (78). An orange arrow points from this group of objects to a report table on the right. The report table has a dotted outline at the top, indicating it is the body of the report. The table contains the following data:

Patron Barcode	Patron Borrower Category	Items Checked Out	Patron Count
0000000000	Student	1	99
060314001	Student	3	99
071500	Student	1	99
1000000003	Student	2	99
101010	Student	3	99
11	Faculty	2	32
1100994	Student	3	99

Format the column headers:

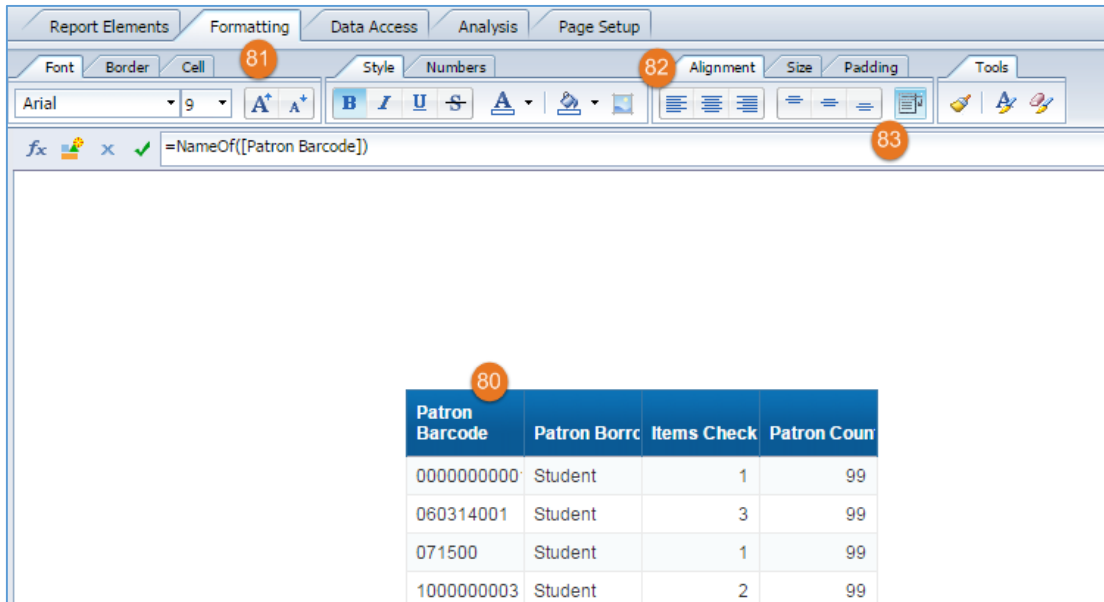
80. Click the **Patron barcode** column header.

81. Click **Formatting** >

82. **Alignment**.

83. Then click the **Wrap Text** button.

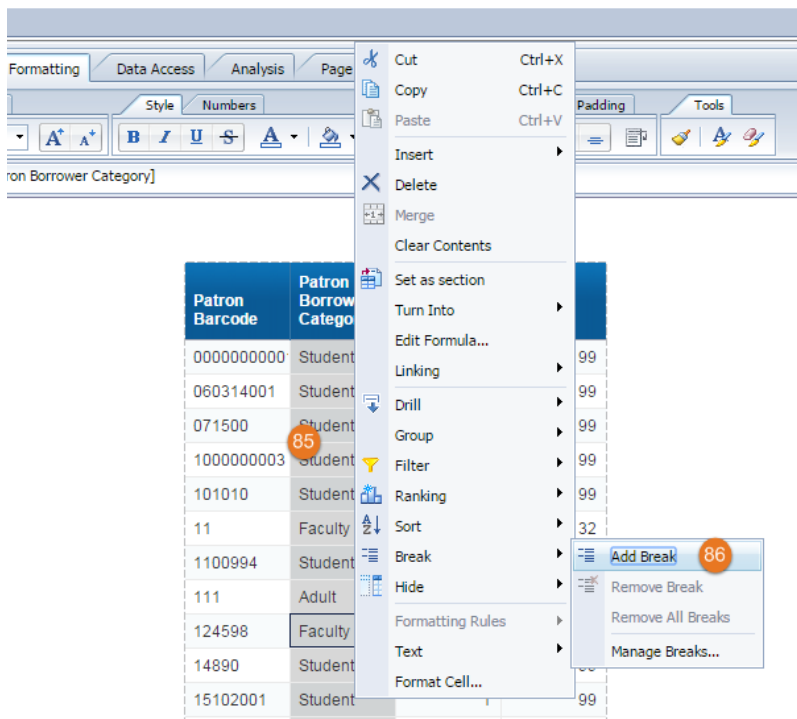
84. Repeat for each column header.



Add breaks:

85. Right-click in a data cell of the **Patron Borrower Category** column.

86. Click **Break > Add Break**.



Insert formulas:

87. Click in a data cell of the **Items Checked Out** column.

88. Click **Analysis >**

89. **Functions >**

90. **Sum.**

91. Click in a data cell of the **Patron Barcode** column.

92. Click **Analysis > Functions > Count.**

Patron Barcode	Patron Borrower Category	Items Checked Out	Patron Count
111	Adult	5	224
188801700		4	224
1888800102		1	224
1888800203		6	224

Add a column for % of borrower category active and add formula:

93. Click in a data cell of the **Patron Count** column.


94. Click **Report Elements >**

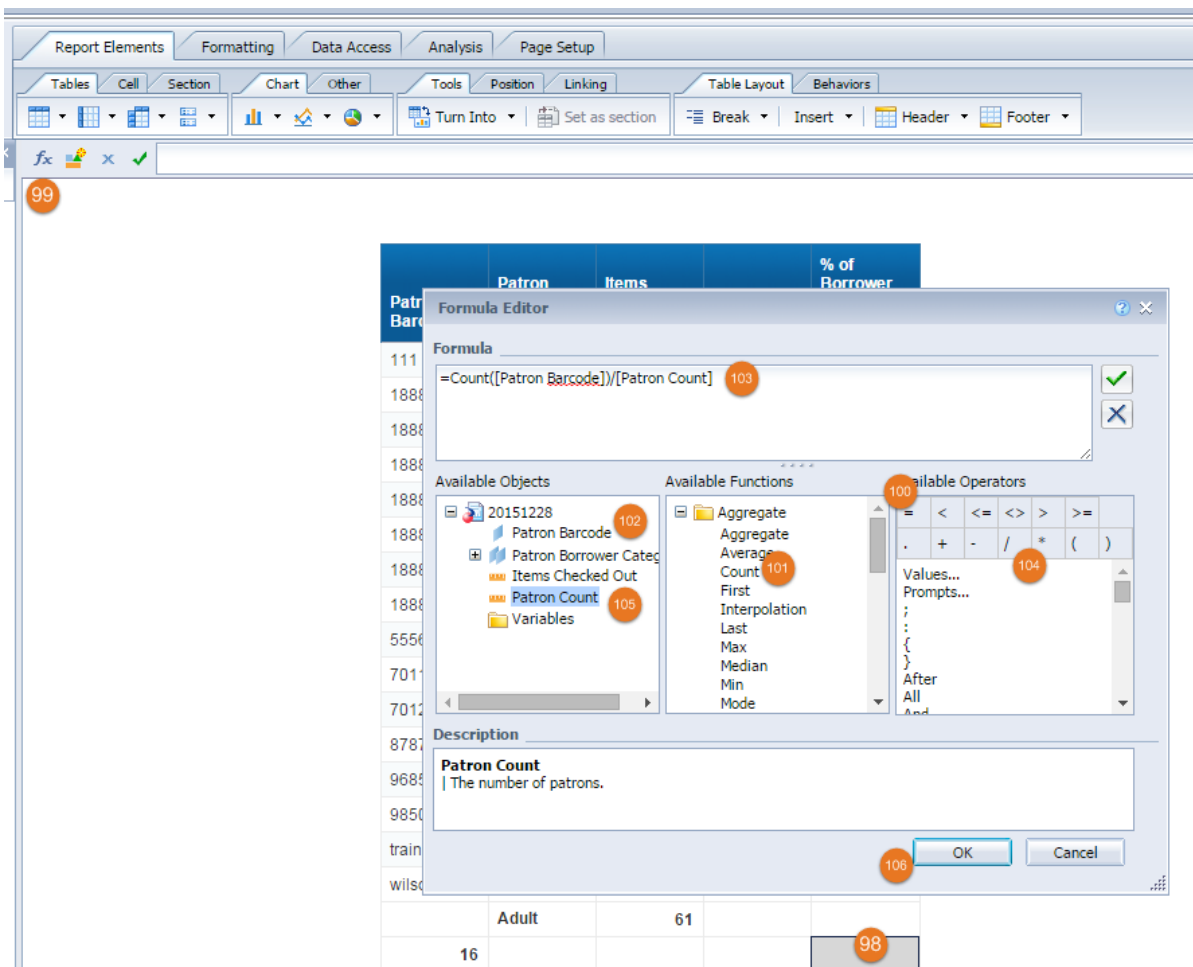
95. **Table Layout >**

96. **Insert > Insert Columns on Right.**

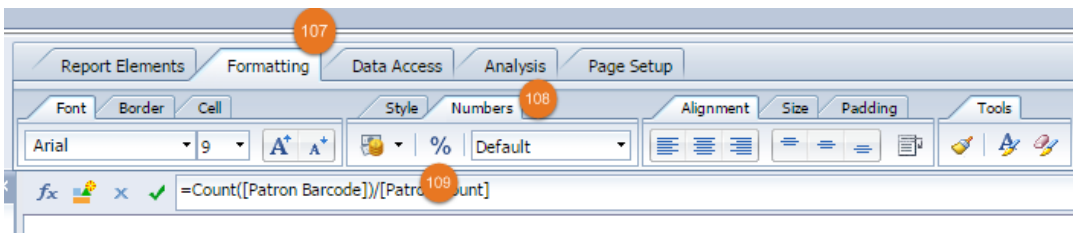
97. Double-click in header of new column; then type **% of Borrower Category Active**; press <Enter>.

Patron Barcode	Patron Borrower Category	Items Checked Out	Patron Count	% of Borrower Category Active
111	Adult	5	224	
188801700		4	224	
1888800102		1	224	
1888800203		6	224	

98. Click in last row of new column.
99. Click **Edit the Formula** button .
100. From **Available Operators**, click =.
101. From **Available Functions**, double-click **Count**.
102. From **Available Objects**, double-click **Patron Barcode**.
103. In Formula box, position cursor at end.
104. From **Available Operators**, click /.
105. From **Available Objects**, double-click **Patron Count**.
106. Click **OK**.



107. Click **Formatting** >
108. **Numbers** >
109. **%**.



Add a column for Avg Circ per Active Patron and add formula:

110. Click in a data cell of the **% of Borrower Category Active** column.

111. Click **Report Elements >**

112. **Table Layout >**

113. **Insert > Insert Columns on Right.**

114. Double-click in header of new column; then type **Avg Circ per Active Patron**; press <Enter>.

The screenshot shows a report editor interface. At the top, there are several tabs: 'Report Elements', 'Formatting', 'Data Access', 'Analysis', and 'Page Setup'. Below these, there are more tabs: 'Tables', 'Cell', 'Section', 'Chart', 'Other', 'Tools', 'Position', 'Linking', 'Table Layout', and 'Behaviors'. The 'Table Layout' tab is active, and a context menu is open over it, showing options: 'Insert Rows Above', 'Insert Rows Below', 'Insert Columns on Left', and 'Insert Columns on Right'. The 'Insert Columns on Right' option is highlighted. Below the ribbon, there is a table with the following data:

Patron Barcode	Patron Borrower Category	Items Checked Out	Patron Count	% of Borrower Category Active	Avg Circ per Active Patron
111	Adult	5	224		
188801700		4	224		
1888800102		1	224		

115. Click in last row of new column.

116. Click **Edit the Formula** button .

117. From **Available Operators**, click **=**.

118. From **Available Functions**, double-click **Sum**.

119. From **Available Objects**, double-click **Items Checked Out**.

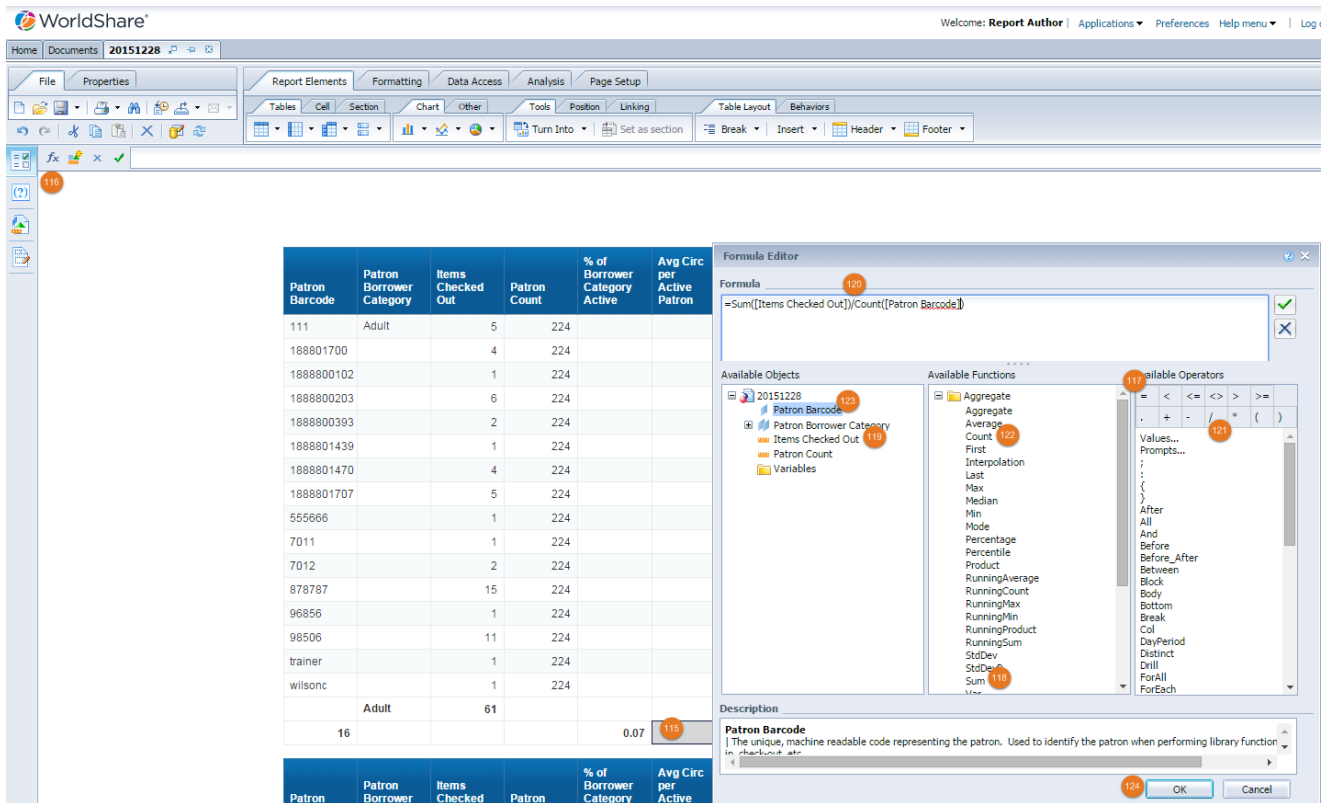
120. In **Formula** box, position cursor at end.

121. From **Available Operators**, click **/**

122. From **Available Functions**, double-click **Count**.

123. From **Available Objects**, double-click **Patron Barcode**.

124. Click **OK**.



The screenshot shows the WorldShare Report Author interface. A data table is displayed with the following columns: Patron Barcode, Patron Borrower Category, Items Checked Out, Patron Count, % of Borrower Category Active, and Avg Circ per Active Patron. The table contains 16 rows of data, with the last row showing a total of 61 items checked out and an average of 0.07 items per active patron.

Patron Barcode	Patron Borrower Category	Items Checked Out	Patron Count	% of Borrower Category Active	Avg Circ per Active Patron
111	Adult	5	224		
188801700		4	224		
1888800102		1	224		
1888800203		6	224		
1888800393		2	224		
1888801439		1	224		
1888801470		4	224		
1888801707		5	224		
555666		1	224		
7011		1	224		
7012		2	224		
878787		15	224		
96856		1	224		
98506		11	224		
trainer		1	224		
wilsonc		1	224		
	Adult	61			
16				0.07	

The Formula Editor dialog box is open, showing the formula $=\text{Sum}(\{\text{Items Checked Out}\})/\text{Count}(\{\text{Patron Barcode}\})$. The available objects include Patron Barcode, Patron Borrower Category, Items Checked Out, and Patron Count. The available functions include Sum, Count, and various aggregate functions. The available operators include =, /, and other mathematical symbols.

Move all subtotals to the same row:

125. Click the subtotal cell for **Patron Borrower Category**.
126. In the Formula Bar, highlight the entire formula, and <Ctrl> <C> to copy the formula.
127. Click the cell immediately below.
128. In the formula bar, <Ctrl> <V> to paste the formula; then press <Enter>.
129. Click the subtotal cell for **Items Checked Out**
130. In the Formula Bar, highlight the entire formula, and <Ctrl> <C> to copy the formula.
131. Click the cell immediately below.
132. In the formula bar, <Ctrl> <V> to paste the formula; then press <Enter>.
133. Click in a data cell of the **Patron Count** column.
134. In the Formula Bar, highlight the entire formula, and <Ctrl> <C> to copy the formula.
135. Click the cell in the subtotal row.
136. In the formula bar, <Ctrl> <V> to paste the formula; then press <Enter>.

Patron Barcode	Patron Borrower Category	Items Checked Out	Patron Count	% of Borrower Category Active	Avg Circ per Active Patron
111	Adult	5	224		
188801700		4	224		
1888800102		1	224		
1888800203		6	224		
1888800393		2	224		
1888801439		1	224		
1888801470		4	224		
1888801707		5	224		
555666		1	224		
7011		1	224		
7012		2	224		
878787		15	224		
96856		1	224		
98506		11	224		
trainer		1	224		
wilsonc		1	224		
	Adult	61			
16	Adult	61	224	0.07	3.81

- Delete the row that is now redundant:
137. Right-click anywhere in the row.
 138. Select **Delete**.
 139. Click **Row**.
 140. Click **OK**.

The screenshot shows a spreadsheet with a context menu open over a row. The menu includes options like Cut, Copy, Paste, Insert, Delete (highlighted with a red circle 138), Merge, Clear Contents, Set as section, Turn Into, Edit Formula..., Linking, Drill, Group, Filter, Ranking, Sort, Break, Hide, Formatting Rules, Text, and Format Cell... A dialog box titled 'Remove table's element' is open, asking 'What do you want to remove?' with radio buttons for 'Row' (selected, with a red circle 139) and 'Column'. The 'OK' button is highlighted with a red circle 140.

Patron Barcode	Patron Borrower Category		% of Borrower Category Active	Avg Circ per Active Patron
111	Adult			
188801700				
1888800102				
1888800203				
1888800393				
1888801439				
1888801470				
1888801707				
555666				
7011				
7012				
878787				
96856				
98506				
trainer				
wilsonc				
16	Adult	61	0.07	3.81

Rename column headings:

141. Double-click the **Patron Barcode** header cell.
142. Type **Active Patron Barcodes** and press <Enter>.
143. Double-click the **Patron Count** header cell.
144. Type **Total Patron Count** and press <Enter>.

Patron Barcode	Patron Borrower Category	Items Checked Out	Patron Count	% of Borrower Category Active	Avg Circ per Active Patron
111	Adult	5	224		
188801700		4	224		
1888800102		4	224		

Fold each section to hide the data and display only summary (subtotal) information:

145. Click **Analysis** >

146. **Interact** >

147. **Outline**.



148. In the outline tree, click the innermost arrow.

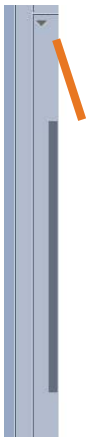
149. Repeat for each section.

Here's a closer look at folding. Fold a section so that only summary information (subtotals) display. If needed, you can unfold a section to again display the detail data that make up that section's summary (subtotal).



**Arrow pointing right:
section is folded**

Active Patron Barcodes	Patron Borrower Category	Items Checked Out
16	Adult	61
Active Patron Barcodes	Patron Borrower Category	Items Checked Out
2	ADULT	2



**Arrow pointing down:
section is not folded**

Active Patron Barcodes	Patron Borrower Category	Items Checked Out	Total Patron Count	% of Borrower Category Active	Avg Circ per Active Patron
11	Faculty	2	32		
124598		4	32		
1888801001		4	32		
20011		1	32		
7014		20	32		
7884		10	32		
852369		1	32		
7	Faculty	42		0.22	6

Save the report:

150. From the **Save** menu

151. Click **Save As**.

152. In the **Save As** dialog, click **Public Folders**.

153. Double-click on the folder with your library's OCLC symbol.

154. Type a file name: **Active Patron Summary**.

155. Click **Save**.

