Tipasa®
Community Meeting

Easy-to-use Report Designer templates for Tipasa

OCLC

Easy-to-use templates for report designer

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Report Designer templates

Label	Name	Use
A01	Lending reasons for no	**Check your lending efficiency** • Too much aging could mean you are understaffed. • Too many In Use / On Loan could mean OCLC needs to adjust your real-time availability setup. • Too many Not Owned could mean holdings need to be updated.
A02	Lending not owned	
A03	Lender efficiency for copies	**Evaluate and update your custom holdings** • Use fill rates, turnaround times, and reasons for no (aging, deflections, policies) to identify lenders to prioritize/deprioritize in your custom holdings paths.
A04	Lender efficiency for loans	
A05	Why lenders said no	
A06	Automation summary	**Improve your automations** • Determine the percentage of requests requiring mediation. • Identify requests that didn't match on automations.
A07	Automation detail by request	
A08	Most requested returnables	**Inform collection development** • Share the most frequently requested items with your collection development colleagues.
A09	Most requested journal titles	

Accessing the templates

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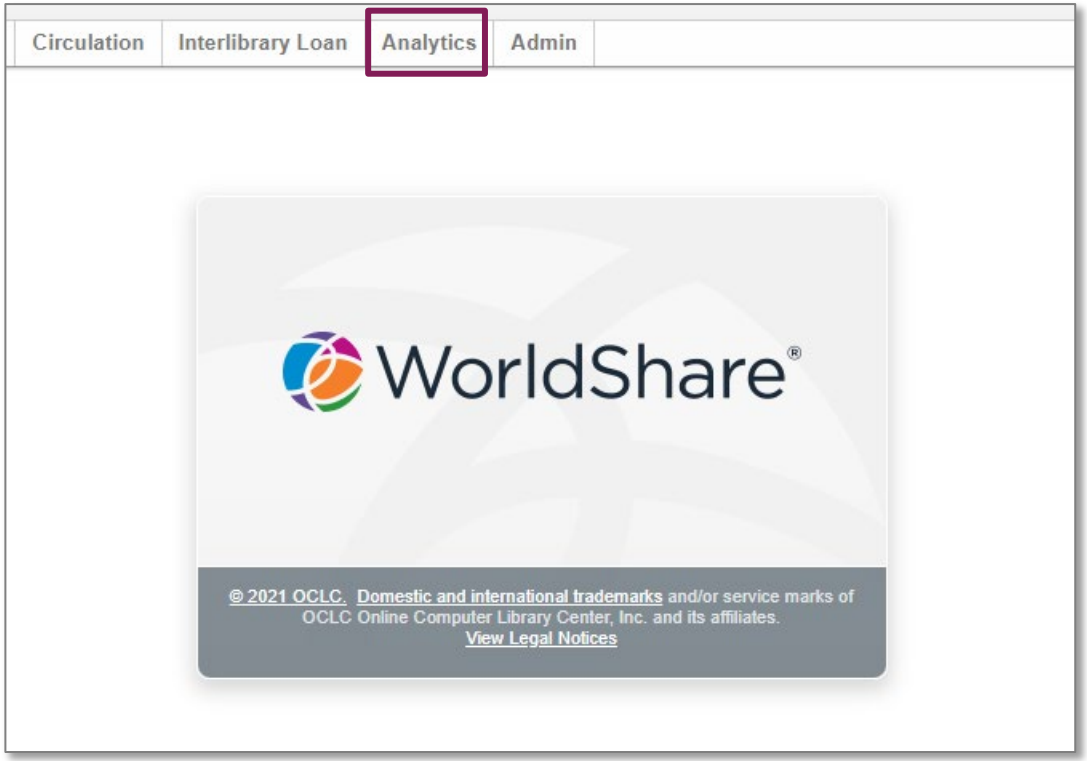
1. Click *Analytics*



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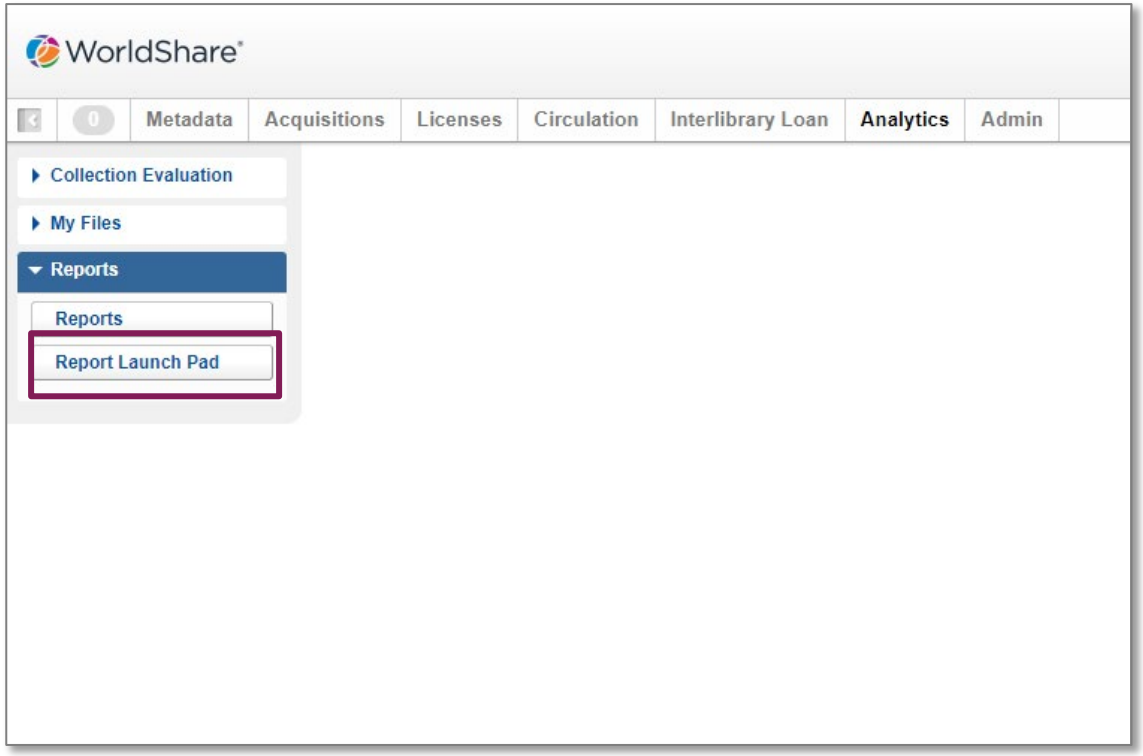
2. Click *Report Launch Pad*



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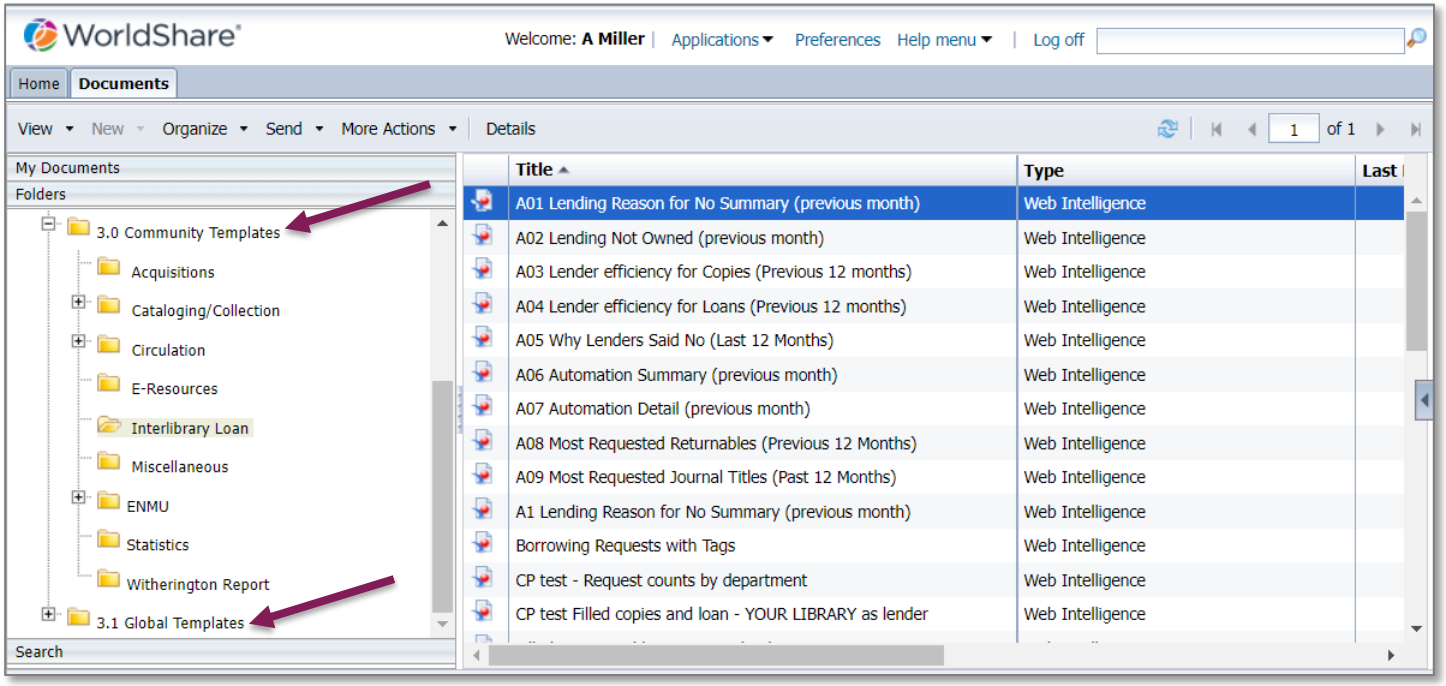
3. Go to *Community Templates* (for US) or *Global Templates* (for non-US)



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4. Go to *Interlibrary Loan*

WorldShare

Welcome: **A Miller** | Applications ▾ Preferences Help menu ▾ | Log off

Home | **Documents**

View ▾ New ▾ Organize ▾ Send ▾ More Actions ▾ | Details

1 of 1

My Documents

Folders

- 3.0 Community Templates
  - Acquisitions
  - Cataloging/Collection
  - Circulation
  - E-Resources
  - Interlibrary Loan
  - Miscellaneous
  - ENMU
  - Statistics
  - Witherington Report
- 3.1 Global Templates

Search

Title	Type	Last
A01 Lending Reason for No Summary (previous month)	Web Intelligence	
A02 Lending Not Owned (previous month)	Web Intelligence	
A03 Lender efficiency for Copies (Previous 12 months)	Web Intelligence	
A04 Lender efficiency for Loans (Previous 12 months)	Web Intelligence	
A05 Why Lenders Said No (Last 12 Months)	Web Intelligence	
A06 Automation Summary (previous month)	Web Intelligence	
A07 Automation Detail (previous month)	Web Intelligence	
A08 Most Requested Returnables (Previous 12 Months)	Web Intelligence	
A09 Most Requested Journal Titles (Past 12 Months)	Web Intelligence	
A1 Lending Reason for No Summary (previous month)	Web Intelligence	
Borrowing Requests with Tags	Web Intelligence	
CP test - Request counts by department	Web Intelligence	
CP test Filled copies and loan - YOUR LIBRARY as lender	Web Intelligence	

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5. Double-click to open a template

WorldShare

Welcome: **A Miller** | Applications ▾ Preferences Help menu ▾ | Log off

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1 of 1

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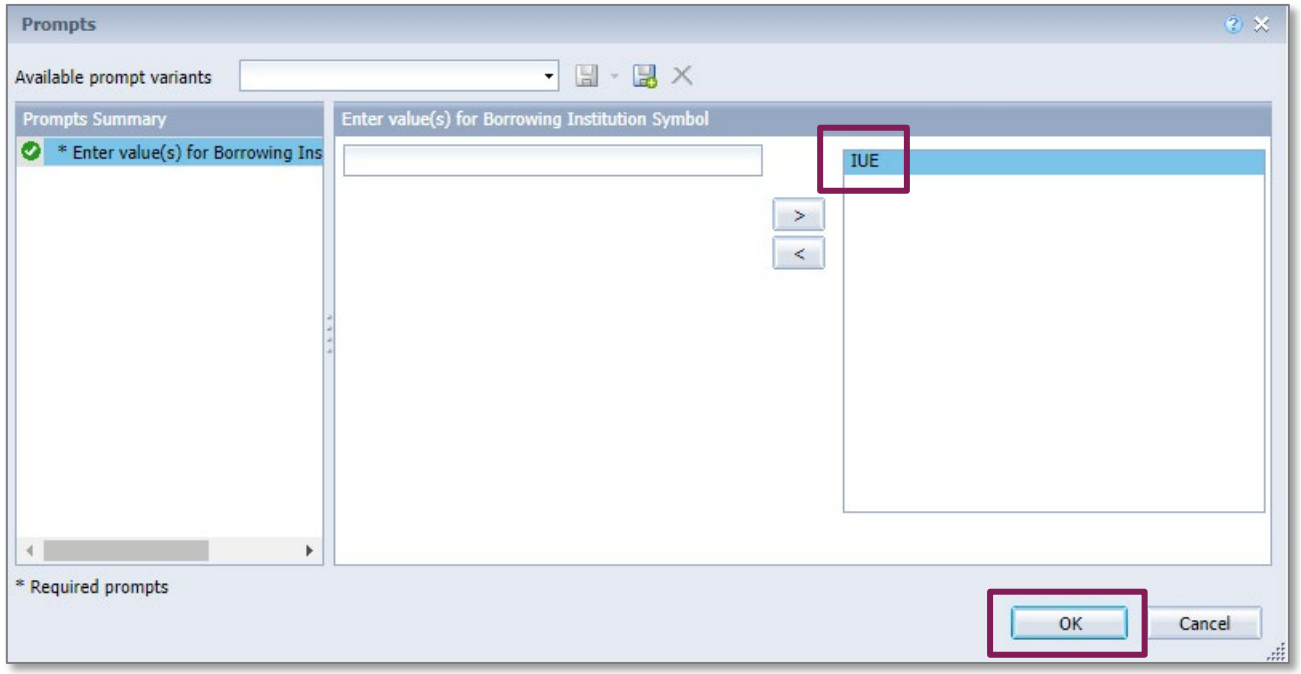
6. Enter your library's OCLC symbol



***Tip*: Symbol must be all-caps**

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7. View report

Most Requested Journal Titles (Previous 12 Months)

OCLC Number	Title	Request Item Material Format	LC Call Number	Dewey Call Number	Request Item ISSN	Number of Requests
1644869	Science.	SERIAL	Q1 .S35	505	0036-8075	23
1478631	Journal of the Air Pollution Control Associat	SERIAL	TD883 .A48	363	0002-2470	7
45469824	Journal of clinical pharmacy and therapeuti	E_SERIAL	RM301.28 .J6	615	1365-2710; 0269-4727	5
800418133	Natural sciences education.	SERIAL	ISSN RECOR	500	2168-8281	5
1518568	Atmospheric environment.	SERIAL	TD881 .A8	628/.53/05	0004-6981	4
39632319	Journal of physical oceanography.	SERIAL	GC1	551	0022-3670 1520-0485	4
725345873	Nature climate change.	SERIAL	QC902.8 .N3	551.6	1758-678X; 1758-6798	3
1220877523	The Effect of Accelerated Processing Cond	MANUSCRIP	N/A	N/A	N/A	3
2378350	New scientist.	SERIAL	Q1 .N52	505	0262-4079 1356-1766	2
24822914	Proceedings of the ... International Softwar	SERIAL	QA76.76.D47	005	1097-1521	2
61325777	Plant methods.	SERIAL	QK1	N/A	1746-4811	2

Sample report

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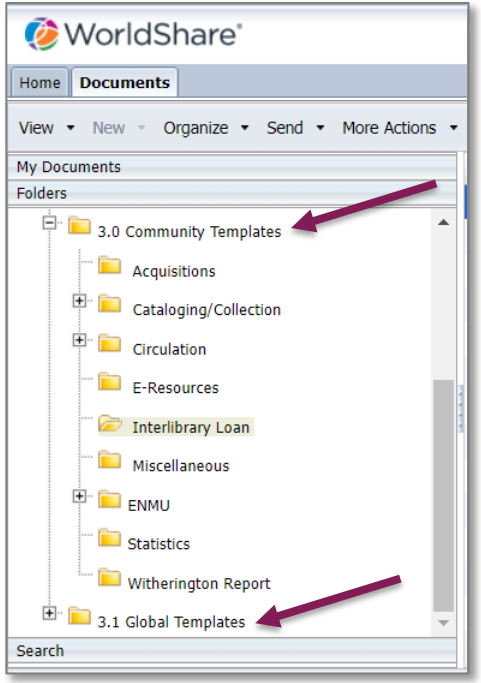
Tip #1: Choose the right folder

- Libraries in the US:
  Use the 3.0 Community Templates folder

- Libraries outside the US:
  Use the 3.1 Global Templates folder
  – Note: Templates copy on the 12th of each month.



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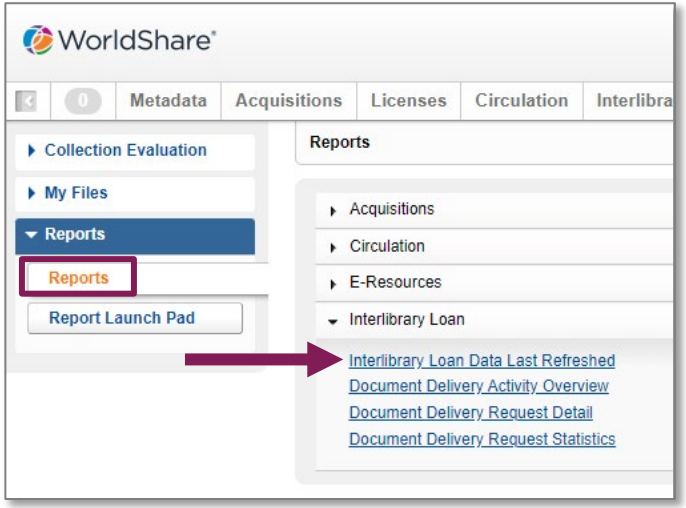
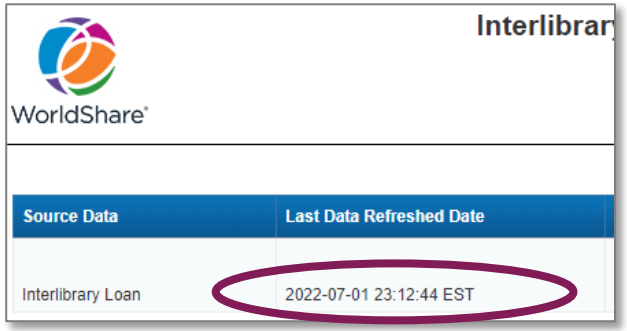
Tip #2: Confirm the date range

- To confirm the dates included in a report, e.g., “previous month”, you can check the last refreshed date.
  - Select Reports > Interlibrary Loan > ILL Data Last Refreshed.





Tip #3: Get definitions

- To see definitions for objects, click “Design” at the top right.
  - Click “Available Objects” at the left.
  - Mouse over the object.

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File | Properties | Report Elements | Formatting | Data Access | Analysis | Page Setup | Reading | Design

Tables | Cell | Section | Chart | More | Tools | Position | Linking | Turn Into | Set as section

Available Objects

Type here to filter tree

- A06 Automation Summary (previous mo
  - Request Copy/Loan Indicator
  - Request Produced Type
  - Created Re
  - Variables
  - References

Request Produced Type

Type: Text

Indicates if the request was created by library staff (STAFF), created by the patron and submitted directly to lenders without staff intervention (UNMEDIATED), or created by the patron and submitted to lenders after some staff intervention (STAFF MEDIATED).

Arranged by Alphabetic order

Automation Summary

Copy or Loan	Request Produced Type	Count	Percent of Total
COPY	STAFF_MEDIATED	6	40.00%
COPY	STAFF	4	26.67%
LOAN	STAFF	3	20.00%
LOAN	STAFF_MEDIATED	2	13.33%
	Total:	**15**	

Report 1

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Tip #4: Get definitions (continued)

- Definitions for report objects:
  help.oclc.org/Library_Management/WorldShare_Reports/Report_objects/Report_objects_by_Universe/Interlibrary_Loan_universe

- Definitions for Reasons for No:
  help.oclc.org/Resource_Sharing/Tipasa/Reports/Use_the_Reasons_for_No_Reports_to_optimize_borrowing_and_lending#Reasons_for_No

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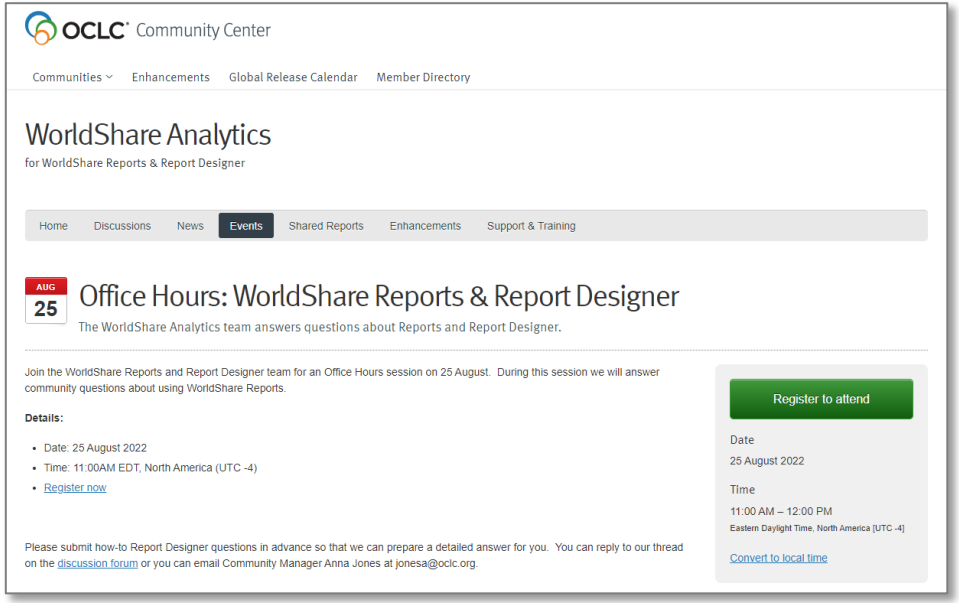
Tip #5: Learn from analytics experts

- Training videos and tutorials: help.oclc.org/Library_Management/WorldShare_Reports/Training

- Monthly office hours



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Community Meeting

Need assistance?

OCLC SUPPORT

support@oclc.org

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