Learn how to use WMS group reports to monitor your group's activity within WorldShare.

Overview

WMS Groups can use the tools available in WMS group reports to monitor your group's activity within the WorldShare application, including reports on WMS activity and cataloging work in Record Manager.

To use WMS group reports, your group will need to meet the following prerequisites:

- Your group must be set up as a WMS Group.
- All group member institutions must be Report Designer customers.
- Your group must designate administrators. Group report administrators will see all data for the group (e.g., Circulation Administrators will see all patron and circulation data across the group). Please confirm your WMS Group leadership is aware and accepting of this functionality.

If your group meets the prerequisites above, contact analyticsfeedback@oclc.org and include each user's:

- Name
- Barcode
- Institution name
- Institution symbol
- Roles that need to be provisioned to the user

Note: The request for HELIN requires a chair to grant permission.

The OCLC Analytics team will be responsible for applying the necessary group roles to allow the admin user to perform group-level reporting. OCLC Analytics will provide additional information about running these reports and understanding the output.

Note: When you are in group scope, all universes have a 500,000 row limit.

WMS group report administrator roles

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<thead>
<tr>
<th>GROUP ADMINISTRATOR ROLE</th>
<th>AVAILABLE UNIVERSES WITH VISIBLE GROUP MEMBER DATA</th>
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<tr>
<td>WMS Group Acquisitions Admin</td>
<td>Acquisitions, Serials Received</td>
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<td>AVAILABLE UNIVERSES WITH VISIBLE GROUP MEMBER DATA</td>
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<tr>
<td>WMS Group Cataloging Admin</td>
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<td>Circulation Events  Circulation Fiscal Transactions  Circulation Hold Request  Circulation Item Status  Circulation Patron Information  Circulation Scheduled Items</td>
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<tr>
<td>WorldShare ILL Group Admin</td>
<td>Circulation Patron Information  Interlibrary Loan</td>
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</table>

Note: Users with the WorldShare ILL Group Admin role will not be able to view any of the contents of the Request Borrower Tags and Request Lender Tags, which are only visible to individual institutions. Select your institution scope when launching Report Designer to view the request tags for your individual institution.

**Open a new group report**

1. In the left navigation, click **Report Launch Pad**.
2. Select your **group symbol** from the Report Scope drop-down list and then click **Continue**.
3. Click a **report category** folder.
4. Double-click the **name** of the report you wish to run. The report will open in a new tab in the Report Launch Pad.

**Schedule a group report**

Caution: The files that appear in My Files do not have any additional security/privacy, so any user with access to My Files in your institution will be able to open and view them. Please use caution if you create reports that contain sensitive data. You may wish to continue to utilize "Default Enterprise Location" for cases where data is sensitive and you wish to limit who can view the output.

You can schedule standard and custom group reports using WorldShare Reports and Report Designer.