

## Executive Summary

This spring, the CUL FOLIO reporting team expanded reporting services for CUL staff to include new ways to use data from the Library Data Platform reporting database. In addition to running report queries with the "Virtual DBeaver" environment, staff may now use data dashboards stored on Cornell's Tableau server as well as daily automated report result files in Excel that are stored in Box folders.

Now that multiple data delivery formats are available, an expanded structure for providing Cornell Library staff members with access to these formats is required. The following is a proposal for workflows for provisioning CUL staff members with access to data stored on the LDP (Library Data Platform) reporting database in the various formats now provided. Please see the included diagram of proposed workflows.

Essentially, the proposal is to simplify the process of provisioning all CUL staff members for access to non-restricted LDP data (e.g., circulation, inventory) by using Active Directory permissions, as well as to safeguard access to restricted LDP data (e.g., financials) by managing access manually with approval from library supervisors and functional area leadership.

### What is LDP Data?

The LDP reporting database gets its data from the FOLIO application server through an overnight data transfer. When CUL Staff use LDP data, they are using the latest copy of yesterday's data.

### LDP Data versus FOLIO Application Data

The LDP data originates on the FOLIO application server. The LDP reporting database is a read-only copy of data from the FOLIO application server. Those who use an application to work with LDP data cannot make any changes to data on the FOLIO application server.

### How to Work with LDP Data

There are 3 main ways CUL staff members can work with data stored on the LDP reporting database: Virtual DBeaver, Tableau Dashboards, and Box.

1. Using the *Virtual DBeaver* reporting application environment to run or build SQL queries
  - Data Access: Users with accounts have access to query, view, and download **all** LDP data
  - Provisioning Process: User requests access using an online form, supervisor approves, access is granted
  - Example: A circulation staff member in Mann library has been given permission by their supervisor to use Virtual DBeaver to run report queries on the LDP reporting database. The circulation staff member logs into DBeaver, modifies the services usage query (CR108) to filter for the Mann library location, then runs the query to see the number of circulation transactions in Mann Library. The results help the circulation staff member see how many circ desk employees will be needed at the Mann Library circulation desk.
2. Using *Tableau Dashboards* published on Cornell's Tableau Server
  - Data Access: Users can view aggregated LDP data in the form of tables and graphs. The ability to download the underlying data can be controlled for each dashboard.

Dashboards are "published" (made available) to users by permissions groups. The groups are Assessment and Planning, All Staff, Selectors, and F&BO.

- The "Assessment and Planning" permissions group allows any CUL staff member to see dashboards published to the "Assessment and Planning" group. Some dashboards allow users to download PDFs with visuals built from LDP data.
- The "All Staff" permissions group allows any CUL staff member to see dashboards published to the "All Staff" group.
- The "Selectors" permissions group allows selectors and selector support staff to see dashboards published to this group.
- The "F&BO" (Finance and Budget Office) permissions group allows library accounting staff to see dashboards published to this group.
- Provisioning Process:
  - The "Assessment and Planning" Tableau permissions group uses Active Directory permissions for all CUL staff.
  - The "All Staff" Tableau permissions group uses Active Directory permissions for all CUL staff.
  - Selectors and selector support staff are granted access to the "Selectors" Tableau permissions group manually with approval from Kizer Walker.
  - Library Accounting staff are granted access to the "F&BO" Tableau permissions group manually with approval from Ken Putnam.
- Example: A selector has been given approval to be included in the "Selectors" Tableau permissions group by Kizer Walker. The selector opens the "Fund Summary" Tableau dashboard to see aggregated LDP data related to expenditures for funds.

### 3. Using Excel files generated by automated reports and stored in *Box*

- Data Access: Staff members have access to Excel files containing results of queries automated to run and export LDP data to Box folders that are restricted to selectors and selector support staff.
- Provisioning Process:
  - Selectors and selector support staff are granted access to automated reports for selectors manually with approval from Kizer Walker
  - Library Accounting staff are granted access to accounting automated reports manually with approval from Ken Putnam
- Example: A staff member in F&BO (Finance and Budget Office) has been granted permission by Ken Putnam to access accounting automated reports in Box. The staff member opens the automated reports folder in Box to review the results of a query that was run automatically on the LDP reporting database to see a list of approved invoices by vendor.