

# FOLIO SQL Query Directory for Canned Reports

For information about standards for contributing report queries to the CUL FOLIO Canned Reports Directory, please refer to the CUL [FOLIO Report Development Standards](#).

Click the link below to go to the reports list you wish to view.

## Filter Directory

For a list of parameters (options to use as a filter), see the [Filter Directory](#). Options for filtering your report results are typically entered in the WITH statement at the top of the query. For example, to get report results associated with a specific location, such as items stored at Olin Library, you would enter "Olin" as the location parameter option in the WITH statement. This would limit your results set to items in Olin Library. For ad hoc queries that are written for specific needs and cannot be generalized, please see the [Directory for Ad Hoc Reports](#).

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## All Reports

All Reports						
Link to SQL Query	Last Updated	Report Name	Description	related Dashboard	Related JIRA REP Issues	Setup
<a href="#">CR100</a>	1/14/22	loans_counts	loans by location		REP-103	vp25
<a href="#">CR101</a>	7/11/22	fund_expenditures_by_po_line_invoice_payments	shows fund expenditures by purchase order line within a given invoice payment date range. For each purchase order line number, the fund data attributes are shown alongside the purchase order line transaction amount.		REP-157, REP-285	slm5
<a href="#">CR102</a>	7/27/21	title_count <b>*WARNING : long-running query!</b>	provides title counts for non-electronic resources cataloged in inventory by various filters		REP-230	slm5
<a href="#">CR103</a>	4/12/22	annex_non_circulating_items	This query finds items at the Annex that have a "non-circulating" permanent loan type, excluding rare and special collections. It also finds items with an hourly loan type.			jl41
<a href="#">CR104</a>	11/19/21	claimed_returned	shows a list of items that patrons claim they have returned, but are not showing as checked in by the system (where the item status is 'claimed returned').		REP-203	vp25
<a href="#">CR105</a>	11/16/21	item_related_exceptions	shows a list of exceptions, which are actions taken by an operator (staff member) and are recorded in the circulation log. An example is when an item has been manually discharged or discharged by an operator.		REP-278	vp25
<a href="#">CR106</a>	09/01/22	missing_or_lost_items  Note: see <a href="#">CR198</a> for lost_laptops_and_equipment	creates a list of missing or lost items at a given library, and includes missing date, size/pagination, last checkin date, and last checkin location. Sorts in call number order.		REP-152	jl41 vp25
<a href="#">CR107</a>	01/31/22	requests	list of patron requests within a specified date range, and by request type.		REP105; REP-143; REP-274; REP-275	vp25, jl41

CR108	7/27/21	services_us age	number of circulation transactions by service-point and transaction type, with time aggregated to date, day of week, and hour of day.		REP-243	vp25
CR109	7/1/21	standing_or der_purcha se_orders	This is a daily report run by acquisitions staff to review firm purchase orders against standing purchase orders. The report includes po number, po line number, po create date, vendor code, order status, BIB ID (from MARC), po line number, po line item id, series statement (490/830 tag from MARC).		REP-283	np55
CR110	7/27/21	item count  *WARNING : long- running query!	provides a summary of item and piece counts for non-electronic resources cataloged in the Inventory, by various filters		REP-19 REP-20 REP-21 REP-229 REP-231	nb299
CR111	6/21/21	duplicate orders on ISBN	used by Acquisitions to identify recent orders that duplicate already held volumes or that lack standard numbers and require manual searching		REP-281	np55
CR112	7/8/21	daily_appr_i nv_manuals	used by Accounting for Endowed Daily Approve Invoice by Condition Flag - Manual Check		REP-10	nb299
CR113	7/8/21	daily_appr_i nv_exported	used by Accounting for Endowed Daily Approve Invoice by Condition Flag - Exported Check		REP-10	nb299
CR114	7/8/21	daily_appr_i nv_vendor	used by Accounting for Endowed Daily Approve Invoice by Group, Vendor, Invoice Number, and Invoice Lines to Check Record		REP-10	nb299
CR115	8/3/21	daily_dist_b y_account	used by Accounting for Endowed Payables Distribution by Account		REP-10	nb299
CR116	10/12/21	payables_in v_not_fed_ notes	used by Accounting for Endowed Payables Invoices Not Fed		REP-10	nb299
CR117	7/12/21	acrl_circulat ion	used for ACRL circulation count reporting		UXPROD- 1915	vp25
CR118	12/14/21	items_lost_i n_transit	List of items where item status is 'in transit' but they haven't been checked in at the home location (permanent location) after a specified time period. Therefore the items might have been lost or misplaced on their way back to their home location.		REP-190	vp25
CR119	7/28/21  updated 9/4 /22	patron_list	List of patrons including patron details and group type (faculty, undergrads, etc.)		REP-220	vp25  jl41
CR120	7/8/21	daily_appr_i nv_control	summary of vouchers by account number, including exported and manuals		REP-10, REP-284	nb299
CR121		daily_appr_i nv_vendor_ fund	provides the voucher lines details per vendor invoice and funds and results show vendor invoice payments from transactions on the previous day		REP-10	nb299
CR122	9/12/22	fund_detail	Provides the list of all active funds along with their ledger, fund group and fund type. It also provides allocations, transfers, encumbrances, expenditures, fund balance and percentage spent for each fund.		REP-98, REP-286, REP-287	nb299
CR123	7/14/22	open_orders	provides a list of open purchase orders and their amount paid, broken down by purchase order lines		REP-283	nb299
CR124	11/19/21	lost_paid_re turned  NOTE: under review; contact jl41 or vp25	list of items that were lost and paid for by the patron, but later found and returned. Identifies items for which patrons need to be reimbursed.		REP-88	vp25  jl41
CR125	7/14/22	appr_invoic es_vendor_ funds	Provides the list of approved invoices within a date range along with vendor name, invoice number, fund group and fund used.		REP-82	nb299
CR126	03/10/23	Borrow_dire ct_interlibra ry_loan_rec alls	This query provides a list of overdue CUL-owned items checked out to Borrow Direct or Interlibrary loan patrons that have been recalled (these items have not yet been received by CUL, based on the current due date).		REP-272	vp25  jl41
CR127	12/10/21	Borrow_dire ct_interlibra ry_loan_ove rdue_items	Provides a list of items owned by CUL and borrowed by BD/ILL patrons, that are overdue.		REP-272	vp25
CR128	10/06/22	ceased_or_ cancelled_s erials_with_ annex_matc hes	Provides a list of ceased or cancelled serials based on the specified location and shows matches to the annex where they exist. The holdings summary for both the specified location and the annex location are displayed.		REP-215	jl41, vp25

CR128B	10/11/22	item_level_ ceased_or_ cancelled_s erials	This query finds ceased or cancelled serials for a specified owning library and LC class, and shows if there are holdings at the Annex. The query shows all item records (at the owning library) for those titles. Annex item-level detail is not shown, but the Annex holdings statements are displayed.		REP-215	jl41, vp25
CR129	8/27/21	pol_notes	Lists purchase order lines with internal notes associated with each of those lines		REP-280	np55
CR130	9/9/21	fund_expen ditures_by_ po_line	Shows fund expenditures by purchase order line. Fund data attributes such as fund group, fund type, fund code, transaction type, and transaction type are provided.		REP-157, REP-285	slm5
CR131	9/24/21	duplicate instances on ISBNs	This report checks existing instances created within the last 5 days for duplicate records in the system. It shows duplicate records with date created for new duplicates along with local identifiers (899 and 773 MARC fields). It shows both valid and invalid ISBNs.		REP-281	np55
CR132	01/23/2023	YTD_acct_ bal_by_ledg er_univ_acct	This report provides the year-to-date external account cash balance along with total expenditures, initial allocation, and net allocation. This is an accounting report used for monthly reconciliation.			nb299
CR133 - BY REQUEST - please use the Req uest Form to get this report	12/10/21	shelf_list_d uplicate fla gging	Shows all holdings in a specified location along with holdings for the same titles in other libraries.  <b>NOTE: Results are tricky to interpret; please contact jl41 or vp25</b>		New	jl41, vp25
CR134	8/31/23	appr_invoic es_bib_data	This query provides the list of approved invoices within a date range along with vendor name, finance group name, vendor invoice number, fund details, purchase order details, language, instance subject, LC classification, LC class, LC class number, and bibliographic format.		REP-39, REP-83, REP-287	nb299, jl41
CR134_F	11/22/22	appr_invoic es_for_fina nce_team	This query provides the list of approved invoices within a date range along with vendor name, finance group name, vendor invoice number, fund details, and purchase order details.		REP-39, REP-83, REP-287	nb299
CR135	11/5/21	sum_appr_i nv_ledger_ acct	This query provides the total of transaction amount by account number along with the finance ledger and finance group within a date range			nb299
CR136	10/4/21	appr_inv_p er_univ_acc t_detail_dat e_range	This query provides the list of approved invoices within a date range along with the external account, vendor name, invoice number, and transaction amount.			nb299
CR137_1		duplicate_in voices_100 0+	This query searches for duplicate invoices within 360 days with \$1,000+ total amount of the invoice accordingly.			np55
CR137_2		duplicate_in voices_lesst han1000	This query searches for duplicate invoices within 180 days with less than \$1,000 total amount of the invoice accordingly.			np55
CR138	6/7/22	orders_split _funds	This query provides the list of split funds purchases for an invoice line that has multiple funds used and the transaction amount for each fund and the percentage spent.		REP-98	nb299
CR139	11/5/21	daily_FBO_i nv_appr_pa id_diff_date	This query provides a list of approved invoices that have been paid at a different date. Sometimes Folio won't allow an invoice to get paid and the invoice will only be paid at a later day, after changes have been made.			nb299
CR140	11/8/21	fbo_change _in_allocati on	This report provides a list of change in allocation per date range. A negative transaction amount is for an increase in allocation and a positive amount is for a decrease in allocation.			nb299
CR141	11/18/21	lost_bursar ed_returned	This report finds all items that were billed as lost, then bursared, and later returned. Folio marks such bills as "refunded fully," but in fact refunds have to be processed manually. This report allows you to identify charges that must get manual refunds.		New	jl41, vp25
CR142	12/1/21	appr_inv_n o_transac_ date_range	This query provides the list of approved invoices within a date range for which transactions has not been created. This query should not return any data if the system is working properly.			nb299
CR143_A - BY REQUEST - please use the Req uest Form to get this report	12/6/21	hathitrust_s erial_holdin gs  <b>Note: long- running query, results post to local schema</b>	This set of queries creates the list of serials holdings in <a href="#">conforming to this specification</a> that CUL sends to HathiTrust. The queries create 11 intermediate tables that write to the local schema before creating the final dataset.		REP-18	np55

CR143_B - BY REQUEST - please use the <a href="#">Request Form</a> to get this report	12/13/21	hathitrust_monograph_holdings  Note: long-running query, results post to local schema	This set of queries creates the list of single volume monographic (SVM) holdings <a href="#">confirming to this specification</a> that CUL sends to HathiTrust.		REP-18	np55
CR143_C - BY REQUEST - please use the <a href="#">Request Form</a> to get this report	12/13/21	hathitrust_multivolume_holdings  Note: long-running query, results post to local schema	This set of queries creates the list of multivolume monographic (MVM) holdings <a href="#">confirming to this specification</a> that CUL sends to HathiTrust.		REP-18	np55
CR144 - BY REQUEST - please use the <a href="#">Request Form</a> to get this report	7/1/22  in review; not currently available	volume_count_adc*  Note: long-running query, results post to local schema  *adc = Annual Data Collection  NOTE: Need to add retro statistics	This set of queries provides volume count statistics for Cornell annual statistics reports by unit and by "on campus" versus the Annex. The counts generated include total volumes held, volumes added, and volumes added retrospectively.		REP-21	np55
CR145	01/28/22	Equipment_with_holdings_checkouts_stats	This report shows all laptops and equipment for a given library, with total checkouts and renewals as of today's date. It includes patron group name as well as stat codes to indicate whether the item has been archived or not.		REP-291, REP-103	jl41, vp25
CR146	01/11/22	missing_items_dates_ranges	This report shows items where the item status is 'Missing'. It is different from CR106 in that it includes parameters for filtering results by the last 2 weeks, the last 6 months, the last year, the last 2 years, and a freeform start date and end date.		REP-152	slm5, vp25, jl41
CR147_A - BY REQUEST - please use the <a href="#">Request Form</a> to get this report	in review, not currently available	circulation_charges_renewals_adc	Circulation statistics (charges and renewals) by library, patron group and collection type (regular, reserve, laptop, equipment) used for the annual data collection. Excludes SPEC and ILL/BD owned by other institutions.		REP-195	jl41, lm15
CR147_B - BY REQUEST - please use the <a href="#">Request Form</a> to get this report	in review, not currently available	annual_circulation_consolidated_stats	Annual circulation statistics by consolidated patron group		REP-195	jl41
CR148	01/19/22	Expired_patrons_with_unreturned_overdue_books	Finds all expired patrons with unreturned overdue books (most are lost). Shows book details and some patron information (net ID, patron group).		REP-292	jl41, vp25
CR149	01/28/22	Checkouts_by_loan_policy_and_material_type_overview	Overview of checkouts by owning library, loan policy and material type. Allows you to see how libraries are circulating their equipment.		New	jl41, vp25

CR150 - BY REQUEST - please use the Request Form to get this report	01/28/22	Physical_and_Ereserve_stats	Reserve statistics for a given semester, for both e-reserve and print reserve. Requires separate queries to pull out data from Ares, which is then imported into the LDP.  NOTE: This query is for Fall 2021, and needs to be updated for Spring 2022, as it needs fresh ARES data for each semester.		REP-106	Jl41, vp25
CR151	01/28/22	checkouts_by_userid	Finds checkouts by a specific userid. This report is used to get a list of checkouts for an individual patron. It also contains patron information.		New	jl41, vp25
CR152	02/10/22	patron_groups_with_demographics	This report groups and counts active patrons by college and department.		REP-271	jl41, vp25
CR153	02/10/22	active_patrons_with_demographics	This report provides a list of all active patrons, along with their demographics (name, netid, college, department, patron group).		REP-271	jl41, vp25
CR154	06/09/22	titles_by_subject_and_language	Shows titles held by subject, format, language, and location.		REP-229	np55, jl41
CR155	02/22/22	Title_count_by_fiscal_year_Voyager	Provides a count of titles acquired by fiscal year in a given location, using pre-Folio data from Voyager. This report does not contain subject headings. <u>Needs access to VGER data.</u>		New	jl41, vp25
CR156 - BY REQUEST - please use the Request Form to get this report	02/28/22	Historical_charges_from_Voyager	Provides a count of historical charges. This query can be modified to get item level details. Although it is possible to use filters such as location, call number, item type, item create date, material type, and Voyager bib ids, the filters in this report are hard-coded, as they are a complex set of filters. <u>Please ask Joanne Leary for assistance.</u> Details at the item level are not available. Needs access to VGER data.		New	jl41, vp25
CR157	01/24/2023	Funds_and_teams_with_expense_class	Provides a detailed current date report of funds and teams with amounts spent, encumbered, and remaining. It also shows the expense class.		New	nb299
CR158	02/18/22	Circ_stats_1_checkouts	Checkouts of the last month by library, patron group, and material type.		New	jl41, vp25
CR159	03/09/23	Circ_stats_2_requests	Compilation of requests grouped by date, owning library, location, type of requests, status of requests, pickup point, type of service point, patron group name, and material type.		New	jl41, vp25
CR160 - BY REQUEST - please use the Request Form to get this report  Warning - currently requires manual processing of results	7/1/22  in review; not currently available	soundrec_piece_ct_adc  Note: long-running query, some results post to local schema  *adc = Annual Data Collection	This set of queries provides sound recording piece count statistics for Cornell annual statistics reports, by unit "on campus," and by unit at the Annex.		New	lm15
CR161 - BY REQUEST - please use the Request Form to get this report  Warning - currently requires manual processing of results	7/1/22  in review; not currently available	vidrec_piece_ct_adc  Note: long-running query, some results post to local schema  *adc = Annual Data Collection	This set of queries provides video recording piece count statistics for Cornell annual statistics reports, by unit "on campus," and by unit at the Annex.		New	lm15

CR162 - BY REQUEST - please use the Request Form to get this report	6/27/22  in review; not currently available	title_count_non-micro_physical_adc_stats  Note: long-running queries; some results post to local schema	Count of all physical titles except those in microform format, by bib format.		REP-230adc1	lm15
CR163 - BY REQUEST - please use the Request Form to get this report	5/10/22  in review; not currently available	title_count_micro_adc_stats  Note: long-running queries; some results post to local schema	Count of microform titles, by bib format.		REP-230adc2	lm15
CR164 - BY REQUEST - please use the Request Form to get this report	8/11/22  in review; not currently available	title_count_servremo_adc_stats  Note: long-running queries; some results post to local schema	Count of serv,remo titles, by bib format, through CUL-applied codes (in previous version, leader format used).  PLEASE NOTE: this query does not yet exclude unpurchased PDA.		REP-230adc3	np55, lm15
CR164alt - BY REQUEST - please use the Request Form to get this report	8/5/22  in review; not currently available	title_count_servremo_adc  Note: long-running queries; some results post to local schema	Count of serv,remo titles, by bib format, through leader coding. An alt query for limited use. Contact Linda Miller for more info.		REP-230adc3	np55, lm15
CR165	01/23/2023	funds_and_teams	Provides a current date report of funds and teams with amounts spent, encumbered, and remaining. This report does not include expense class (see CR157).		New	nb299
CR166	4/14/22	pcc_records_cataloged_by_user	lists PCC records cataloged by a given user		New	np55
CR167	4/27/22	expired_patron_with_unreturned_overdue_books	Finds all expired patrons with unreturned overdue books (most are lost). Shows book details and some patron info (net ID, patron group).		New	jl41
CR168	IN REVIEW 5/11/22	physical_serial_titles_currently_received_adc	Count of physical serial titles currently received for the annual data collection. Blocked.		part of REP-228	np55, lm15
CR169	6/24/22	database_count_adc	Gets counts of databases for ACRL and NCES reporting. Note: This currently includes all CISER databases. May be revised.		part of REP-41	np55, lm15
CR170	5/12/22	item_status_in_process	Shows items that still have an "in Process" status, which may indicate that they were not properly discharged when they were received at the owning library (after being cataloged).		NEW	jl41, vp25
CR171	5/23/22	BD_ILL_selectors_report -Part 1	Lists title, patron group and department (where available) for items borrowed by CUL patrons from other universities on Borrow Direct and Interlibrary Loan. Parameters for loan date range included.		REP-156	jl41
CR172	5/24/22	BD_ILL_selectors_report - Part 2	Lists item details for items borrowed from CUL by other universities' patrons on Borrow Direct and Interlibrary Loan. Parameters for loan date range included.		REP-156	jl41, vp25

CR173	7/29/22	Patron_pur chase_reque sts (see CR202 for newest version of this query)	Lists patron requests to purchase items, including requestor netid or other requestor information (where available) and item details including location name (from PO lines), fund name, fund code, and total circulation count.  NOTE: For limited versions of this report that include fiscal year and days till fulfillment, see ad hoc reports AHR112 (Folio data) and AHR113 (Voyager data).		NEW	jl41, vp25
CR174A	9/30/23	BD_ILL_cul _lender	The 2 queries CR174A and CR174B are both Borrow Direct (BD) and Inter Library Loan (ILL) count queries. The first one, BD_ILL_cul_lender, provides a count of BD and ILL loans from CUL to other universities. These loans are identified via patron type, where the patron type is Borrow Direct, or InterLibrary Loan.		REP-156	jl41, vp25
CR174B	9/30/23	BD_ILL_cul _borrower	The 2 queries CR174A and CR174B are both Borrow Direct (BD) and Inter Library Loan (ILL) count queries. The second one, BD_ILL_cul_borrower, provides a count of BD and ILL loans to CUL from other universities. These loans are identified via material type, where the material type is Borrow Direct, or InterLibrary Loan.		REP-156	jl41, vp25
CR175	6/6/22	team_relate d_split_funds	Shows split funds by PO line that enables selectors to filter by the funds for their team while also seeing what other team funds split a purchase order payment with them.		NEW	np55, vp25
CR176	6/7/22	annex_dupli cates  NOTE: Requires a list of item barcodes to be brought into the local schema.	This report matches items from an imported list of barcodes to holdings at the Annex. The purpose is to identify duplicate holdings to prevent them from being sent to the Annex.		NEW	jl41
CR177	6/7/22	items_in_pr ocess	This report finds items with an 'In process' status. Typically, a newly cataloged book is sent to the owning library 1-3 days after being cataloged and bookmarked, where it is discharged, which changes the status from "In process" to "Available." This report shows books that still have an 'In process' status (status date shown), which may be those that were received but haven't been discharged before they were shelved. The only parameter is for owning library. The catalog link is shown to make it easy to view the display in the catalog.		NEW	jl41
CR178	6/8/22	cataloger_c ounts	Lists items cataloged (instance id and title) by cataloger netid, date, ttype, and unit (Its, law, etc.)		NEW	jmp8, jl41, vp25
CR179	6/23/22	bursared_it ems_by_fin e_fee_date _and_mater ial_type	This report finds bursared items with fines or fees using the payment method of "CUL Transfer Account" and a fine fee type action of "Transferred Fully." Filters for fine date range and material type are included.		NEW	slm5
CR180 - BY REQUEST - please use the Req uest Form to get this report	6/24/22	773_and_8 99_aggr_co unts_adc  Note: long- running queries;	Gets counts of aggregators and other collections coded in 773 and 899 fields. Used to help track changes in e-counts from year to year. First version.		NEW	np55, lm15
CR181	8/2/22	circ_count_ by_instance HRID	This report returns circ counts from both Voyager and Folio for an individual instance HRID, as selected in the parameters. Title, location, and number of items are also included.		NEW	jl41, vp25
CR182	8/17/22	voyager_ch eckouts_by _circ_desk	This query counts Voyager checkouts at a given circ desk and date range by semester, year, month, weekday, hour, patron group, loan period, item type and collection group (regular collection, laptop, equipment or reserve). It is used to show a very granular level of detail of Voyager circ desk activity. The results are meant to be exported to Excel and then analyzed by pivot tables or other means.		NEW	jl41, vp25
CR183	10/11/22	laptop_circ_ counts	This query counts laptop circs by library, date, loan type, and laptop type (Mac or PC). Please note that until August 2022, Mann laptop laptop loans were made through LibCal as well as Folio, and this report includes only Folio counts. As of early August 2022, all Mann laptop loans are in Folio.		NEW	jl41, vp25
CR184A	11/21/22	physical_col lections_use	This query counts loans and renewals by date range, owning library, patron group, material type and collection type.			jl41, vp25
CR184B	10/24/22	physical_col lections_us e_split	This report splits up CR184A into two parts: one query for loans, and one query for renewals, with a fiscal year filter for each. These two queries are specifically constructed for use in Tableau dashboards		NEW	jl41, vp25

CR185	9/20/22	ceased_cancelled_titles_holdings_level	This query finds ceased or cancelled titles at the holdings level for a specified owning library and LC class, and shows if there are holdings at the Annex.		NEW	jl41, vp25
CR186	9/20/22	ceased_cancelled_titles_item_level	This query finds ceased or cancelled titles at the item level, for a specified owning library and LC class, and shows if there are holdings at the Annex.		NEW	jl41, vp25
CR187	9/20/22	acronyms_holdings_level	This query finds conference proceedings that contain selected acronyms in the title or alternate title for a specified owning library at the holdings level, counts the number of volumes, and shows matches to the Annex.  <i>NOTE: This query is hard-coded for acronyms, marc fields, call number, and location. Please request assistance if needed.</i>		NEW	jl41, vp25
CR188	9/20/22	acronyms_item_level	This query finds conference proceedings that contain selected acronyms in the title or alternate title for a specified owning library at the item level, counts the number of volumes, and shows matches to the Annex.  <i>NOTE: This query is hard-coded for acronyms, marc fields, call number, and location. Please request assistance if needed.</i>		NEW	jl41, vp25
CR189	9/20/22	book_list	This query creates a list of books at a specified library showing title, author, call number, year of publication and number of circs (Voyager plus Folio).		NEW	jl41, vp25
CR190	10/11/22	inactive_patrons_with_open_fines	This query finds inactive patrons with open fines.		NEW	jl41, vp25
CR191 (under review)	10/11/22	physical_materials_counts	This query is an annual count query of all physical materials holdings. The query can be run as a whole and then filtered for material type based on the details provided at the end of the query, or specified 'Where' statements can be included in the query to obtain data subsets by material type. A fiscal year filter is included, based on the date the item was created.		NEW	vp25
CR192	10/25/22	withdrawn_items	This query finds the number of items withdrawn in the date range specified, as of 7-1-21 and going forward. From 7-1-21 through 8-14-22, the withdrawn information comes from the holdings note on specific holdings records.  <i>NOTE: As of 8-15-22, the count of withdrawn items comes from the administrative note on the instance record and is not linked to specific holdings records. In this case, the the query lists all the holdings locations, and the total number of pieces withdrawn, without being able to specify from which locations the withdrawals took place.</i>  The query lists title, holdings hrid, library name, location name, call number, holdings type, withdrawal date, and number of pieces withdrawn.		NEW	jl41, vp25
CR193	10/25/22	filled_delivery_requests	This query provides a count of all contactless delivery and circulation desk pickup requests, by fiscal year. Patron group, material type, request type, and location details are included.		NEW	jl41, vp25
CR194	11/14/22	checkouts_and_checkins_by_date_range_and_service_point	This query finds checkouts and checkins by month for a given service point and date range. Item records that have been deleted will show a material type name of "Unknown". Because most deleted records are equipment records, these items have been categorized as "Equipment" collection type as a best guess.		NEW	jl41
CR195	1/5/24	expense_transfer	This query is a customization of CR-134 (paid invoices with bib data) for the purpose of identifying expenditures that can be transferred from unrestricted funds to restricted funds.		NEW	jl41
CR196	12/02/22	lost_laptops_and_equipment	This query identifies laptops and equipment with an item status of "Aged to lost," "Declared lost" or "Lost and paid" and displays the loan and borrower information.		NEW	jl41, vp25
CR197	12/15/22	physical_materials_counts_by_marc_format_type	This query provides a count of all distinct instances, holdings, and items, by marc format type as classified using the 06 and 07 fields in the Marc leader. It also includes format types based on the old Voyager bib format table, for comparison purposes.		NEW	jl41, vp25
CR198	02/16/23	lost_laptops_and_equipment	This query finds lost laptops and equipment items at a given library.		NEW	jl41, vp25
CR199	2/23/23	serials_by_owning_library_and_annex_holdings	This query gets serials by owning library and LC class, and shows holdings at the Annex.		NEW	jl41, vp25
CR200	2/28/23	newly_received_items_counts	This query provides a count of newly received items by library and date. Item details are not included.		NEW	jl41, vp25

CR201	2/28/23	coutts_shelf_ready_items	This query gets Olin items that were purchased as "CouttsShelfReady" in LC classes A and K. An instance create date of 6/18/21 is a migrated record from Voyager.		NEW	jl41, vp25
CR202	3/1/23	patron_purchase_requests_folio	This query lists all patron purchase requests in Folio, including patron netid (where available), item details, circ count, fund information, and item cost.		NEW	jl41, vp25
CR203		patron_purchase_requests_voyager_folio				
CR204	5/3/23	missing_lost_claimed_returned	This query creates a list of missing, lost, and claimed returned items (including equipment) at a given library, and includes item status date, last date and location of check in, and size/pagination. Sorts in call number order.		NEW	jl41, vp25
CR205	4/11/23	libraries_locations_service_points_owners	This query finds libraries, locations, service points and fine owners associated with the service points.		NEW	jl41, vp25
CR206	4/11/23	open_fines_older_than_x_days	This query finds open fines older than a given number of days old, for an owning library.		NEW	jl41, vp25
CR207	4/17/23	po_lines_no_expense_class	The query finds any purchase order line that doesn't have an expense class assigned.		NEW	ama8, nb299, slm5
CR208	5/5/23	identifying_DVDs	This query identifies DVDs in the library location specified.		NEW	jl41
CR209	5/16/23	Identifying_VHS	This query identifies VHS tapes in the library location specified.		NEW	jl41
CR210	5/16/23	Missing_Lost_items_for_selectors	This query is specifically for selectors and it shows Missing and Lost items with different fields included that are useful in making replacement decisions. It is more extensive than the 'lost and missing' circulation query.		NEW	jl41
CR211	5/16/23	Locations_with_item_counts_for_permanent_and_temporary_locations	This query counts the total number of items in all locations (perm and temp locations), even if there are zero items, and includes suppressed and unsuppressed records. It was written for the Locations project, as requested by Tom Trutt.		NEW	jl41
CR212	5/16/23	Number_of_holdings_records_in_permanent_and_temporary_locations	This query counts the total number of holdings records in all locations (perm and temp locations), even if there are zero holdings, and includes suppressed and unsuppressed records.		NEW	jl41
CR213	6/21/23	current_encumbrances	This query provides a list of current encumbrances along with other encumbrances info per purchase order line. It can be filtered by fiscal year and fund code.		NEW	nb299, jl41, slm5
CR214	9/30/23	Physical Item Counts	This query provides counts of physical items (excluding microforms), by format type and holdings library and location.		NEW	vp25
CR215	9/30/23	Unique Title (Instance) Counts	This query provides counts of unique titles (instances) of physical items (excluding microforms), by format type.		NEW	vp25
CR216	9/30/23	Microform Counts	This query provides counts of microforms, by format type.		NEW	vp25
CR217	6/26/23	Ematerial Counts	This query provides counts of ematerials by format type.		NEW	vp25
CR218	7/25/23	Checkouts and Browsers by location, date range and LC class	This query finds Folio charges and browses for a given location and date range (or semester) and LC class, and shows the total historical Voyager charges and browses.		NEW	jl41, vp25
CR219 (Draft)	7/28/23	shelf_list_inventory	This query finds shelf list inventory information by library location. The most_recent_patron_group field determines what patron group an item was assigned to most recently, which is important for assignments to the Borrow Direct and Inter Library Loan patron groups, which change frequently.		NEW	slm5, jl41

CR220	8/15/23	Voyager and Folio circ counts with parameters	This query finds total Voyager and Folio circ usage for given parameters: LC class, library, title, instance hrid and/or language.		NEW	jl41, vp25
CR221	9/15/23	Microform Guides in Olin and Kroch showing copies in stacks or at the Annex	This query finds microform guides in Olin and Kroch libraries and shows additional copies in the stacks or at the Annex.		NEW	jl41, vp25
CR222	7/7/23	key_counts	This query counts instances, holdings, items, loans, srs marctab instances, srs marctab records with "001" fields, srs marctab records with "999" fields that include "i" subfields, and srs record instances on the LDP Production database. If srs_marctab_001 and 999i counts are equal and within about 1,000 records of the count for SOURCE=MARC in the FOLIO Inventory application, then srs_marctab counts are acceptable.		NEW	slm5
CR223	2/7/24	approvals_and_firm_orders	This query finds all orders (not just approvals) showing the "bill to" and "ship to" locations in the purchase order or invoice. It also includes the purchase order location, workflow status, order type, order format, vendor name, fund, and fiscal year.		NEW	jl41, np55, slm5
CR224	2/7/24	approval_plan_titles_by_vendor_and_statistical_code	This query uses the source of acquisition statistical code of "Approval/Blanket Order" to identify titles associated with approval plans. It also shows approval plan titles associated with vendors using the vendor code from the MARC record 980 subfield "v" if it is available.		NEW	np55
CR225	11/22/23	purchase_requests_within_days_elapsed_until_checkout	This query gets purchase requests in Voyager and Folio and calculates the number of days between the request date and checkout date.		NEW	jl41
CR226	12/20/23	funds_for_stewardship	This query was modified from CR134 to accommodate alumni affairs needs for information on stewarded funds. It provides all the same information as CR134 but includes primary contributor name, publisher name, publication date, publication place, and filter for Endowments funds.		NEW	ama8, jl41, slm5
CR227	12/20/23	cu_press_cul_collections_match	This query shows titles in the CUL collection that were published by CU Press or one of its imprints and don't match by ISBN, or have no ISBNs at all and so can't be matched to the CU press list.		NEW	jl41
CR228	12/18/23	brill_publications	This query finds Brill print monographs publications at CUL and shows the LC class and class number, total circulation (Voyager and Folio), most recent checkout, cost and fund (Folio only for now).		NEW	jl41
CR229	1/10/24	inventory_by_call_number_range_with_links_to_online_access	This is a generalized version of the query that finds Mann items in a specified call number range for possible transfer to the Annex and record cleanup.		NEW	jl41
CR230	2/5/24	collection_inventory_with_checkout_s_and_browses_by_date_range	This query finds all items in a given location or library, and shows all charges and browses within the specified date range.		NEW	jl41
CR231	3/8/24	LTS	This report gets serials received by LTS personal, on which day it was received, with bill_to location "Law Technical Services not included", item format as "Physical, receiving status as "received", po_number, po_number prefix, order_format, ship_to location	LTS Acquisition Statistic Dashboard, LTS Receiving Story		np55
CR232	3/8/24	inst_updated_date	This query pulls the updated_by_userid and the updated_date field data from the inventory instance record. This data is then joined to the MARC 245/a field to get the instance title and instance HRID.			np55
CR233	3/12/24	ADC Location Translation Table	This query creates the location translation table that is used for Annual Data Collection (ADC) queries.		NEW	jl41
CR234	3/18/24	LTS Firm Orders Created	This reports looks at new LTS Purchase orders created for new titles, print and electronic (Law titles are not included)	LTS Acquisition Statistic Dashboard, LTS Firm Orders		np55

CR235	3/18/24	LTS Approvals Titles Added	This report gets new titles that were received on approval plan via statistical code.	LTS Acquisition Statistic Dashboard, LTS Approval Orders		np55
CR236	3/18/24	LTS Miscellaneous Titles Added	This report pulls new titles added by instance statistical code	LTS Acquisition Statistic Dashboard, LTS Miscellaneous Titles Added		np55
CR237	3/28/24	Campus Store matches by ISBN	This report matches a list of ISBN numbers from the Campus Store to library holdings			jl41
CR238/MC R238	04/10/24	Get Instance records	This report uses LDP/metadb function to get a particular MARC record field content			np55
CR239						slm5, jl41
CR241	5/15/24	cjkt_language_by_fiscal_year	This query finds all item or holdings records in Chinese, Japanese, Korean and Tibetan languages that were added to the collection during or after the fiscal year specified. All libraries and locations are included.			slm5, jl41
MCR400						
MCR401	4/10/24	clean_up_100_e.sql	This report pulles value of 100/ sf "e"	LTS Data_clean up Dashboard		np55

## Access Services Reports

Access Services reports						
CUL Report Code and Link to Query	Last Updated	Report Name	Description	~Time to run	Related JIRA REP Issues	Setup
CR100	1/14/22	loans_counts	loans by location		REP-103	vp25
CR102		title_count	provides title counts for non-electronic resources cataloged in inventory by various filters		REP-230	slm5
CR103	4/12/22	annex_non_circulating_items	This query finds items at the Annex that have a "non-circulating" permanent loan type, excluding rare and special collections. It also finds items with an hourly loan type.	~1 minute		jl41
CR104	11/19/21	claimed_returned	shows a list of items that patrons claim they have returned, but are not showing as checked in by the system (where the item status is 'claimed returned').		REP-203	vp25
CR105	11/16/21	item_related_exceptions	shows a list of exceptions, which are actions taken by an operator (staff member) and are recorded in the circulation log. An example is when an item has been manually discharged or discharged by an operator.		REP-278	vp25
CR106	09/01/22	missing_items	creates a list of missing items, and includes all item details.		REP-152	vp25
CR107	01/31/22	requests	list of patron requests within a specified date range, and by request type.		REP105; REP-143; REP-274; REP-275	vp25, jl41
CR108		services_usage	number of circulation transactions by service-point and transaction type, with time aggregated to date, day of week, and hour of day.		REP-243	vp25
CR110		item count	provides a summary of item and piece counts for non-electronic resources cataloged in the Inventory, by various filters		REP-19 REP-20 REP-21 REP-229 REP-231	nb299

CR117		acrl_circulation	used for ACRL circulation count reporting		UXPROD-1915	vp25
CR118	12/14/21	items_lost_in_transit	List of items where item status is 'in transit' but they haven't been checked in at the home location (permanent location) after a specified time period. Therefore the items might have been lost or misplaced on their way back to their home location.		REP-190	vp25
CR119		patron_list	List of active patrons including patron details and group type (faculty, undergrads, etc.)		REP-220	vp25
CR124	11/19/21	lost_paid_returned  NOTE: under review; contact jl41 or vp25	list of items that were lost and paid for by the patron, but later found and returned. Identifies items for which patrons need to be reimbursed.		REP-88	vp25
CR126	03/10/23	Borrow_direct_interlibrary_loan_recalls	This query provides a list of overdue CUL-owned items checked out to Borrow Direct or Interlibrary loan patrons that have been recalled (these items have not yet been received by CUL, based on the current due date).		REP-272	vp25, jl41
CR127	12/10/21	Borrow_direct_interlibrary_loan_overdue_items	Provides a list of items owned by CUL and borrowed by BD/ILL patrons, that are overdue.		REP-272	vp25
CR128	10/06/22	ceased_or_cancelled_serials_with_annex_matches	Provides a list of ceased or cancelled serials based on the specified location and shows matches to the annex where they exist. The holdings summary for both the specified location and the annex location are displayed.		REP-215	jl41, vp25
CR145	01/28/22	Equipment_with_holdings_checkouts_stat Codes	This report shows all laptops and equipment for a given library, with total checkouts and renewals as of today's date. It includes patron group name as well as stat codes to indicate whether the item has been archived or not. .		REP-291, REP-103	jl41, vp25
CR148	01/19/22	Expired_patrons_with_unreturned_overdue_books	Finds all expired patrons with unreturned overdue books (most are lost). Shows book details and some patron information (net ID, patron group).		REP-292	jl41, vp25
CR149	01/28/22	Checkouts_by_loan_policy_and_material_type_overview	Overview of checkouts by owning library, loan policy and material type. Allows you to see how libraries are circulating their equipment.		New	jl41, vp25
CR150	02/02/22	Physical_and_Ereserve_stats	Reserve statistics for a given semester, for both e-reserve and print reserve. Requires separate queries to pull out data from Ares, which is then imported into the LDP.  NOTE: This query cannot be run unless data from ARES are imported into the LDP.		REP-106	jl41, vp25
CR151	01/28/22	checkouts_by_userid	Finds checkouts by a specific userid. This report is used to get a list of checkouts for an individual patron. It also contains patron information.		New	jl41, vp25
CR152	02/10/22	patron_groups_with_demographics	This report groups and counts active patrons by college and department.		REP-271	jl41, vp25
CR153	02/10/22	active_patrons_with_demographics	This report provides a list of all active patrons, along with their demographics (name, netid, college, department, patron group).		REP-271	jl41, vp25
CR155	02/22/22	Title_count_by_fiscal_year_Voyager	Provides a count of titles acquired by fiscal year in a given location, using pre-Folio data from Voyager. This report does not contain subject headings. <u>Needs access to VGER data.</u>		New	jl41, vp25
CR156	02/28/02	Historical_charges_from_Voyager	Provides a count of historical charges. This query can be modified to get item level details. Although it is possible to use filters such as location, call number, item type, item create date, material type, and Voyager bib ids, the filters in this report are hard-coded, as they are a complex set of filters. <u>Please ask Joanne Leary for assistance.</u> Details at the item level are not available. Needs access to VGER data.		New	jl41, vp25

CR158	02/18/22	Circ_stats_1_checkouts	Checkouts of the last month by library, patron group, and material type.		New	jl41, vp25
CR159	03/09/23	Circ_stats_2_requests	Compilation of requests grouped by date, owning library, location, type of requests, status of requests, pickup point, type of service point, patron group name, and material type.		New	jl41, vp25
CR170	5/12/22	item_status_in_process	Shows items that still have an "In Process" status, which may indicate that they were not properly discharged when they were received at the owning library (after being cataloged).	< 1 minute	NEW	jl41, vp25
CR171	5/23/22	BD_ILL_selectors_report - Part 1	Lists title, patron group and department (where available) for items borrowed by CUL patrons from other universities on Borrow Direct and Interlibrary Loan. Parameters for loan date range included.	a few seconds	REP-156	jl41
CR172	5/24/22	BD_ILL_selectors_report - Part 2	Lists item details for items borrowed from CUL by other universities' patrons on Borrow Direct and Interlibrary Loan. Parameters for loan date range included.	a few seconds	REP-156	jl41, vp25
CR177	6/7/22	items_in_process	This report finds items with an 'In process' status. Typically, a newly cataloged book is sent to the owning library 1-3 days after being cataloged and bookmarked, where it is discharged, which changes the status from "In process" to "Available." This report shows books that still have an 'In process' status (status date shown), which may be those that were received but haven't been discharged before they were shelved. The only parameter is for owning library. The catalog link is shown to make it easy to view the display in the catalog.		NEW	jl41
CR182	8/17/22	voyager_checkouts_by_circ_desk	This query counts Voyager checkouts at a given circ desk and date range by semester, year, month, weekday, hour, patron group, loan period, item type and collection group (regular collection, laptop, equipment or reserve). It is used to show a very granular level of detail of Voyager circ desk activity. The results are meant to be exported to Excel and then analyzed by pivot tables or other means.		NEW	jl41, vp25
CR183	10/11/22	laptop_circ_counts	This query counts laptop circs by library, date, loan type, and laptop type (Mac or PC). Please note that until August 2022, Mann laptop loans were made through LibCal as well as Folio, and this report includes only Folio counts. As of early August 2022, all Mann laptop loans are in Folio.		NEW	jl41, vp25
CR189	9/20/22	book_list	This query creates a list of books at a specified library showing title, author, call number, year of publication and number of circs (Voyager plus Folio).		NEW	jl41, vp25
CR190	10/11/22	inactive_patrons_with_open_fines	This query finds inactive patrons with open fines.		NEW	jl41, vp25
CR193	10/25/22	filled_delivery_requests	This query provides a count of all contactless delivery and circulation desk pickup requests, by fiscal year. Patron group, material type, request type, and location details are included.		NEW	jl41
CR194	11/14/22	checkouts_and_checkins_by_date_range_and_service_point	This query finds checkouts and checkins by month for a given service point and date range. Item records that have been deleted will show a material type name of "Unknown". Because most deleted records are equipment records, these items have been categorized as "Equipment" collection type as a best guess.		NEW	jl41
CR196	12/02/22	lost_laptops_and_equipment	This query identifies laptops and equipment with an item status of "Aged to lost," "Declared lost" or "Lost and paid" and displays the loan and borrower information.		NEW	jl41
CR197	12/15/22	physical_materials_counts_by_marc_format_type	This query provides a count of all distinct instances, holdings, and items, by marc format type as classified using the 06 and 07 fields in the Marc leader. It also includes format types based on the old Voyager bib format table, for comparison purposes.		NEW	jl41, vp25
CR198	02/16/23	lost_laptops_and_equipment	This query finds lost laptops and equipment items at a given library.		NEW	jl41, vp25
CR199	2/23/23	serials_by_owning_library_and_annex_holdings	This query gets serials by owning library and LC class, and shows holdings at the Annex.		NEW	jl41, vp25
CR200	2/28/23	newly_received_items_counts	This query provides a count of newly received items by library and date. Item details are not included.		NEW	jl41, vp25

CR201	2/28/23	coutts_shelf_ready_items	This query gets Olin items that were purchased as "CouttsShelfReady" in LC classes A and K. An instance create date of 6/18/21 is a migrated record from Voyager.		NEW	jl41, vp25
CR202	3/1/23	patron_purchase_requests_folio	This query lists all patron purchase requests in Folio, including patron netid (where available), item details, circ count, fund information, and item cost.		NEW	jl41, vp25

## Accounting Reports

Accounting Reports						
CUL Report Code and Link to Query	Last Updated	Report Name	Description	~Time to run	Related JIRA REP Issues	Setup
CR101	07/11/22	fund_expenditures_by_po_line_invoice_payments	shows fund expenditures by purchase order line within a given invoice payment date range. For each purchase order line number, the fund data attributes are shown alongside the purchase order line transaction amount.		REP-157, REP-285	slm5
CR112		daily_appr_in_v_manualls	used by Accounting for Endowed Daily Approve Invoice by Condition Flag - Manual Check		REP-10	nb299
CR113		daily_appr_in_v_exported	used by Accounting for Endowed Daily Approve Invoice by Condition Flag - Exported Check		REP-10	nb299
CR114		daily_appr_in_v_vendor	used by Accounting for Endowed Daily Approve Invoice by Group, Vendor, Invoice Number, and Invoice Lines to Check Record		REP-10	nb299
CR115		daily_dist_by_account	used by Accounting for Endowed Payables Distribution by Account		REP-10	nb299
CR116	10/12/21	payables_inv_not_fed_notes	used by Accounting for Endowed Payables Invoices Not Fed		REP-10	nb299
CR120		daily_appr_in_v_control	summary of vouchers by account number, including exported and manuals		REP-10	nb299
CR121		daily_appr_in_v_vendor_fund	provides the voucher lines details per vendor invoice and funds and results show vendor invoice payments from transactions on the previous day		REP-10	nb299
CR122	9/12/22	fund_detail	provides fund details summary for active funds		REP-98	nb299
CR123	7/14/22	open_orders	provides a list of open purchase orders and their encumbrance and/or amount paid, broken down by purchase order lines		REP-283	nb299
CR125	7/14/22	appr_invoices_vendor_funds	Provides the list of approved invoices within a date range along with vendor name, invoice number, fund group and fund used.		REP-82	nb299
CR130	9/9/21	fund_expenditures_by_po_line	Shows fund expenditures by purchase order line. Fund data attributes such as fund group, fund type, fund code, transaction type, and transaction type are provided.		REP-157, REP-285	slm5
CR132	01/24/2023	YTD_acct_bal_by_ledger_univ_acct	This report provides the year-to-date external account cash balance along with total expenditures, initial allocation, and net allocation. This is an accounting report used for monthly reconciliation.			

CR134	9/3/22	appr_invoices_bib_data	This query provides the list of approved invoices within a date range along with vendor name, invoice number, fund details and purchase order data. It also provides some Bib data, which will be more complete after the release of Folio Kiwi scheduled for November 2021. The elements that will be added are commented out in the main query.		REP-39, REP-83, REP-287	n b 2 99
CR134_F	11/22/22	appr_invoices_for_finance_team	This query provides the list of approved invoices within a date range along with vendor name, finance group name, vendor invoice number, fund details, and purchase order details.		REP-39, REP-83, REP-287	n b 2 99
CR135	10/4/21	sum_appr_inv_ledger_acct	This query provides the total of transaction amount by account number along with the finance ledger and finance group within a date range			n b 2 99
CR136	10/4/21	appr_inv_per_univ_acct_detail_date_range	This query provides the list of approved invoices within a date range along with the external account, vendor name, invoice number, and transaction amount.			n b 2 99
CR139	11/5/21	daily_FBO_inv_appr_paid_diff_date	This query provides a list of approved invoices that have been paid at a different date. Sometimes Folio won't allow an invoice to get paid and the invoice will only be paid at a later day, after changes have been made.			n b 2 99
CR140	11/8/21	fbo_change_in_allocation	This report provides a list of change in allocation per date range. A negative transaction amount is for an increase in allocation and a positive amount is for a decrease in allocation.			n b 2 99
CR142	12/1/21	appr_inv_no_transactions_date_range	This query provides the list of approved invoices within a date range for which transactions has not been created. This query should not return any data if the system is working properly.			n b 2 99
CR157	01/24/2023	Funds_and_teams_with_expense_class	Provides a detailed current date report of funds and teams with amounts spent, encumbered, and remaining. It also shows the expense class.		New	n b 2 99
CR165	01/23/2023	funds_and_teams	Provides a current date report of funds and teams with amounts spent, encumbered, and remaining. This report does not include expense class (see CR157).		New	n b 2 99
CR179	6/23/22	bursared_items_by_fine_fee_date_and_material_type	This report finds bursared items with fines or fees using the payment method of "CUL Transfer Account" and a fine fee type action of "Transferred Fully." Filters for fine date range and material type are included.		NEW	sl m5
CR195	01/05/24 (revised)	expense_transfer	This query is a customization of CR-134 (paid invoices with bib data) for the purpose of identifying expenditures that can be transferred from unrestricted funds to restricted funds.		NEW	jl 41
CR207	4/17/2023	po_lines_no_expense_class	The query finds any purchase order line that doesn't have an expense class assigned.		NEW	a m a 8, n b 2 9 9, sl m5
CR213	06/21/2023	current_encumbrances	This query provides a list of current encumbrances along with other encumbrances info per purchase order line. It can be filtered by fiscal year and fund code.		NEW	n b 2 9 9, jl 4 1, sl m5

## Acquisitions Reports

Acquisitions Reports

CUL Report Code and Link to Query	Last Updated	Report Name	Description	~Time to run	Related JIRA REP Issues	Setup
<a href="#">CR109</a>		standing order purchase orders	daily report run by acquisitions staff to review firm purchase orders against standing purchase orders		REP-283	np55
<a href="#">CR111</a>		duplicate orders on ISBN	used by Acquisitions to identify recent orders that duplicate already held volumes or that lack standard numbers and require manual searching		REP-281	np55
<a href="#">CR123</a>	9/22/21	open_order s	provides a list of open purchase orders and their encumbrance and/or amount paid, broken down by purchase order lines		REP-283	nb299
<a href="#">CR134</a>	10/26/2021	appr_invoic es_bib_d ata	This query provides the list of approved invoices within a date range along with vendor name, invoice number, fund details and purchase order data. It also provides some Bib data, which will be more complete after the release of Folio Kiwi scheduled for November 2021. The elements that will be added are commented out in the main query.		REP-39, REP-83, REP-287	nb299
<a href="#">CR195</a>	01/05/24 (revised)	expense_t ransfer			NEW	jl41
<a href="#">CR213</a>	06/21/2023	current_en cumbranc es	This query provides a list of current encumbrances along with other encumbrances info per purchase order line. It can be filtered by fiscal year and fund code.		NEW	nb299, jl41,slm5
<a href="#">CR231</a>	3/8/24	LTS Receiving	This report gets serials received by LTS personal, on which day it was received, with bill_to location "Law Technical Services not included", item format as "Physical, receiving status as "received", po_number, po_number prefix, order_format, ship_to location	LTS Acquisition Statistic Dashboard, LTS Receiving Story		np55
<a href="#">CR232</a>	3/8/24	inst_updat ed_date	This query pulls the updated_by_userid and the updated_date field data from the inventory instance record. This data is then joined to the MARC 245/a field to get the instance title and instance HRID.			np55
<a href="#">CR234</a>	3/18/24	LTS Firm Orders Created	This reports looks at new LTS Purchase orders created for new titles, print and electronic (Law titles are not included)	LTS Acquisition Statistic Dashboard, LTS Firm Orders		
<a href="#">CR235</a>	3/18/24	LTS Approvals Titles Added	This report gets new titles that were received on approval plan via statistical code.	LTS Acquisition Statistic Dashboard, LTS Approval Orders		
<a href="#">CR236</a>	3/18/24	LTS Miscellaneous Titles Added	This report pulls new titles added by instance statistical code	LTS Acquisition Statistic Dashboard, LTS Miscellaneous Titles Added		

## Annual Statistics Reports

Documentation (in progress) on how these reports are being used for the CUL annual data collection and for national reporting is available on the [FOLIO Annual Statistics Documentation](#) page.

Annual Statistics Reports						
CUL Report Code and Link to Query	Last Updated	Report Name	Description	~Time to run	Related JIRA REP Issues	Setup
<a href="#">CR144 - BY REQUEST - please use the <a href="#">Request Form</a> to get this report</a>	7/1/22 <b>in review; not currently available</b>	volume_count_stats  <b>Note: long-running query, results post to local schema</b>	newly created and total existing volume count statistics for Cornell annual statistics reports by unit and on campus versus the annex			np55

CR147_A - BY REQUEST - please use the <a href="#">Request Form</a> to get this report	in review, not currently available	circulation_chargesrenewals_adc	Circulation statistics (charges and renewals) by library, patron group and collection type (regular, reserve, laptop, equipment) used for the annual data collection. Excludes SPEC and ILL/BD owned by other institutions.		REP-195	jl41, lm15
CR147_B - BY REQUEST - please use the <a href="#">Request Form</a> to get this report	in review, not currently available	annual_circ_counts_pg_stats	Annual circulation statistics by consolidated patron group		REP-195	jl41
CR160 - BY REQUEST - please use the <a href="#">Request Form</a> to get this report  Warning - currently requires manual processing of results	7/1/22  in review; not currently available	soundrec_piece_count_adc  Note: long-running query, some results post to local schema  *adc = Annual Data Collection	This set of queries provides soundrecording piece count statistics for Cornell annual statistics reports, by unit "on campus," and by unit at the Annex.	14 minutes	New	lm15
CR161 - BY REQUEST - please use the <a href="#">Request Form</a> to get this report  Warning - currently requires manual processing of results	7/1/22  in review; not currently available	vidrec_piece_count_adc  Note: long-running query, some results post to local schema  *adc = Annual Data Collection	This set of queries provides videorecording piece count statistics for Cornell annual statistics reports, by unit "on campus," and by unit at the Annex.	8 minutes	New	lm15
CR162 - BY REQUEST - please use the <a href="#">Request Form</a> to get this report	6/27/22  in review; not currently available	title_count_non-micro_physical_adc_stats  Note: long-running queries; some results post to local schema	Count of all physical titles except those in microform format, by bib format	9 minutes	REP-230adc1	lm15
CR163 - BY REQUEST - please use the <a href="#">Request Form</a> to get this report	5/10/22  in review; not currently available	title_count_micro_adc_stats  Note: long-running queries; some results post to local schema	Count of microform titles, by bib format.	7 minutes	REP-230adc2	lm15
CR164 - BY REQUEST - please use the <a href="#">Request Form</a> to get this report	8/11/22  in review; not currently available	title_count_servremo_viaculcodes_adc  Note: long-running queries; some results post to local schema	Count of serv,remo titles, by bib format, through CUL-applied codes (in previous version, leader format used). PLEASE NOTE: this query does not yet exclude unpurchased PDA.	10 minutes	REP-230adc3	np55, lm15
CR164alt - BY REQUEST - please use the <a href="#">Request Form</a> to get this report	8/5/22  in review; not currently available	title_count_servremo_adc  Note: long-running queries; some results post to local schema	Count of serv,remo titles, by bib format, through leader coding. An alt query for limited use. Contact Linda Miller for more info.	10 minutes	REP-230adc3	np55, lm15
CR168	IN REVIEW 5/11/22	physical_serial_titles_currently_received_adc	Count of physical serial titles currently received for the annual data collection. Blocked.	~3 minutes	part of REP-228	np55, lm15
CR169 IN REVIEW	6/24/33	database_count_adc	Gets counts of databases for ACRL and NCES reporting. Note: This currently includes all CISER databases. May be revised.	~6 minutes	part of REP-41	np55, lm15
CR180 - BY REQUEST - please use the <a href="#">Request Form</a> to get this report	6/24/22  in review; not currently available	773_and_899_aggr_counts_adc  Note: long-running query	Gets counts of aggregators and other collections coded in 773 and 899 fields. Used to help track changes in e-counts from year to year. First version.	~24 minutes	NEW	np55, lm15

CR192	10/25/22	withdrawn_items	<p>This query finds the number of items withdrawn in the date range specified, as of 7-1-21 and going forward. From 7-1-21 through 8-14-22, the withdrawn information comes from the holdings note on specific holdings records.</p> <p>NOTE: As of 8-15-22, the count of withdrawn items comes from the administrative note on the instance record and is not linked to specific holdings records. In this case, the the query lists all the holdings locations, and the total number of pieces withdrawn, without being able to specify from which locations the withdrawals took place.</p> <p>The query lists title, holdings hrid, library name, location name, call number, holdings type, withdrawal date, and number of pieces withdrawn.</p>		NEW	jl41
CR193	10/25/22	filled_delivery_requests	<p>This query provides a count of all contactless delivery and circulation desk pickup requests, by fiscal year. Patron group, material type, request type, and location details are included.</p>		NEW	jl41

## Cataloging Reports

Cataloging Reports						
CUL Report Code and Link to Query	Last Updated	Report Name	Description	~Time to run	Related JIRA REP Issues	Setup
CR102		title_count	provides title counts for non-electronic resources cataloged in inventory by various filters		REP-230	slm5
CR110		item count	provides a summary of item and piece counts for non-electronic resources cataloged in the Inventory, by various filters		REP-19 REP-20 REP-21 REP-229 REP-231	nb299
CR178	6/8/22	cataloger_counts	Lists items catalogued (instance id and title) by cataloger netid, date, ttype, and unit (lts, law, etc.)		NEW	jmp8, jl41, vp25

## Collection Development Reports

Collection Development						
CUL Report Code and Link to Query	Last Updated	Report Name	Description	~Time to run	Related JIRA REP Issues	Setup
CR101	7/7/22	fund_expenditures_by_po_line_invoice_payments	shows fund expenditures by purchase order line within a given invoice payment date range. For each purchase order line number, the fund data attributes are shown alongside the purchase order line transaction amount.		REP-157, REP-285	slm5
CR122	9/12/22	fund_detail	provides fund details summary for active funds		REP-98	nb299
CR123	7/14/22	open_orders	provides a list of open purchase orders and their encumbrance and/or amount paid, broken down by purchase order lines		REP-283	nb299
CR125	7/14/22	appr_invoices_vendor_funds	Provides the list of approved invoices within a date range along with vendor name, invoice number, fund group and fund used.		REP-82	nb299
CR130	9/9/21	fund_expenditures_by_po_line	Shows fund expenditures by purchase order line. Fund data attributes such as fund group, fund type, fund code, transaction type, and transaction type are provided.		REP-157, REP-285	slm5
CR131	9/24/21	duplicate_instances_on_ISBNs	This report checks existing instances created within the last 5 days for duplicate records in the system. It shows duplicate records with date created for new duplicates along with local identifiers (899 and 773 MARC fields). It shows both valid and invalid ISBNs.		REP-281	np55

CR134	8/31/23	appr_invoices_bib_data	This query provides the list of approved invoices within a date range along with vendor name, finance group name, vendor invoice number, fund details, purchase order details, language, instance subject, LC classification, LC class, LC class number, and bibliographic format.		REP-39, REP-83, REP-287	nb299, jl41
CR138	11/5/21	orders_split_funds	This query provides the list of split funds purchases for a purchase order line that has multiple funds used along with the transaction amount for each fund and the percentage spent.		REP-98	nb299
AHR103	02/02/2022	bd_with_annex	This query searches for holdings note type 'Bound with item data' and related item records matched on BC.			np55
CR157	7/07/22	Funds_and_teams_with_expense_class	Provides a detailed current date report of funds and teams with amounts spent, encumbered, and remaining. It also shows the expense class.		New	jl41, vp25
CR165	7/14/22	funds_and_teams	Provides a current date report of funds and teams with amounts spent, encumbered, and remaining. This report does not include expense class (see CR157).		New	nb299
CR171	5/23/22	BD_ILL_selectors_report -Part 1	Lists title, patron group and department (where available) for items borrowed by CUL patrons from other universities on Borrow Direct and Interlibrary Loan. Parameters for loan date range included.	a few seconds	REP-156	jl41
CR172	5/24/22	BD_ILL_selectors_report - Part 2	Lists item details for items borrowed from CUL by other universities' patrons on Borrow Direct and Interlibrary Loan. Parameters for loan date range included.	a few seconds	REP-156	jl41, vp25
CR173	5/24/22	Patron_purchase_requests (see CR202 for newest version of this query)	Lists patron requests to purchase items, including requestor netid or other requestor information (where available) and item details including location name (from PO lines), fund name, fund code, and total circulation count (all currently only for data in Folio).	a few seconds	NEW	jl41, vp25
CR175	6/6/22	team_related_split_funds	Shows split funds by PO line that enables selectors to filter by the funds for their team while also seeing what other team funds split a purchase order payment with them.	1 minute	NEW	nb299
CR181	8/2/22	circ_count_by_instanceHRID	This report returns circ counts from both Voyager and Folio for an individual instance HRID, as selected in the parameters. Title, location, and number of items are also included.		NEW	jl41, vp25
CR195	01/05/24 (revised)	expense_transfer	This query is a customization of CR-134 (paid invoices with bib data) for the purpose of identifying expenditures that can be transferred from unrestricted funds to restricted funds.	~20 seconds	NEW	jl41
CR202	3/1/23	patron_purchase_requests_folio	This query lists all patron purchase requests in Folio, including patron netid (where available), item details, circ count, fund information, and item cost.		NEW	jl41, vp25
CR213	06/21/2023	current_encumbrances	This query provides a list of current encumbrances along with other encumbrances info per purchase order line. It can be filtered by fiscal year and fund code.		NEW	nb299, jl41,slm5

## Collection Management Reports

Collection Management						
CUL Report Code and Link to Query	Last Updated	Report Name	Description	~Time to run	Related JIRA REP Issues	Setup
CR181	8/2/22	circ_count_by_instanceHRID	This report returns circ counts from both Voyager and Folio for an individual instance HRID, as selected in the parameters. Title, location, and number of items are also included.		NEW	jl41, vp25
CR185	9/20/22	ceased_cancelled_titles_holdings_level	This query finds ceased or cancelled titles at the holdings level for a specified owning library and LC class, and shows if there are holdings at the Annex.		NEW	jl41, vp25
CR186	9/20/22	ceased_cancelled_titles_item_level	This query finds ceased or cancelled titles at the item level, for a specified owning library and LC class, and shows if there are holdings at the Annex.		NEW	jl41, vp25
CR189	9/20/22	book_list	This query creates a list of books at a specified library showing title, author, call number, year of publication and number of circs (Voyager plus Folio).		NEW	jl41, vp25
CR208	5/5/23	identifying_DVDs	This query identifies DVDs in the library location specified.		NEW	jl41

## HathiTrust

HathiTrust Reports
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CUL Report Code and Link to Query	Last Updated	Report Name	Description	~Time to run	Related JIRA REP Issues	Setup
<a href="#">CR143_A</a> - BY REQUEST - please use the <a href="#">Request Form</a> to get this report	12/6/21	hathitrust_serial_holdings  <b>Note: long-running query, results post to local schema</b>	This set of queries creates the list of serials holdings in <a href="#">conforming to this specification</a> that CUL sends to HathiTrust. The queries create 11 intermediate tables that write to the local schema before creating the final dataset.		REP-18	np55
<a href="#">CR143_B</a> - BY REQUEST - please use the <a href="#">Request Form</a> to get this report	12/13/21	hathitrust_mono_graph_holdings  <b>Note: long-running query, results post to local schema</b>	This set of queries creates the list of single volume monographic (SVM) holdings <a href="#">conforming to this specification</a> that CUL sends to HathiTrust.		REP-18	np55
<a href="#">CR143_C</a> - - BY REQUEST - please use the <a href="#">Request Form</a> to get this report	12/13/21	hathitrust_multivolume_holdings  <b>Note: long-running query, results post to local schema</b>	This set of queries creates the list of multivolume monographic (MVM) holdings <a href="#">conforming to this specification</a> that CUL sends to HathiTrust.		REP-18	np55