

Selector Data Dashboards

The following reports are automatically updated every morning by 9:00am. The reports include data that was current in the FOLIO system at the end of the previous business day.

These dashboards are restricted to selectors and other authorized staff members. To inquire about access to these dashboards, please submit a request through the [Requesting Reporting Help form](#) and specify that you would like access to selector dashboards.

For Automated Excel downloads for Selector queries, See [Automated Selector Reports](#)

Accessing and Using Data Dashboards - Detailed Instructions

Description	Tableau Dashboard	Excel Downloads	SQL Code for Source Query
This dashboard 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. The dashboard will show all titles paid for by the selected fund as well as all affiliated funds (from any team) that were also used to pay for those titles.	Orders Split Fund	CR175 Excel download	CR175 SQL query
This dashboard 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. As well, it separately shows funds with \$0.00 available balance. It also provides a detailed current date report of funds and teams with expense class information. A fiscal year filter is included.	Fund Detail with Expense Class	CR122 Excel download CR157 Excel download CR165 Excel download	CR122 SQL query CR157 SQL query CR165 SQL query
Shows fund expenditures by purchase order line. For each purchase order line number, details shown are fund ID, fund code, fund name, fund group, fund type and purchase order line transaction amount. Filters are included for all these details as well as for transaction type (credit or payment). When the transaction type is "Payment," the transaction amount is shown as a positive value. When the transaction type is "Credit," the transaction amount is shown as a negative amount.	Fund Expenditures by PO Line Invoice Payments FY2022 Fund Expenditures by PO Line Invoice Payments FY2023	CR101 Excel download	CR101 SQL query
Provides the list of approved invoices along with invoice payment date, vendor name, invoice number, and other details.	Approved Invoices	CR134 Excel download	CR134 SQL query
Provides three-year comparisons of details of e-journals usage by title, publisher, and platform.	E-journals usage 2020 - 2022	EBSCO Consolidated Counter Report	N/A
Provides annual year counts of esuage by resource type. Data not available in Folio; data are from EBSCO Consolidated files, compiled by Sally Lockwood (sjl8) and made available in a BOX folder.	Eusage Counts Annual 2022	EBSCO Consolidated Counter Report	N/A
Annual data from EBSCO Consolidated files, received twice a year. Data not available in Folio. Data compiled by Sally Lockwood (sjl8) and made available in a BOX folder.	E-usage by Title, Annual 2021	EBSCO Consolidated Counter Report	N/A
Annual data from EBSCO Consolidated files, received twice a year. Data not available in Folio. Data compiled by Sally Lockwood (sjl8) and made available in a BOX folder.	E-usage by Platform and Publisher, Annual 2021	EBSCO Consolidated Counter Report	N/A
Provides counts as well as details of BD/ILL loans from CUL to other universities, and from other universities to CUL. For loans to CUL, title names are available, but no further information about the title is available. Patron group and department names are included when available.	Borrow Direct /Interlibrary Loans Counts and Details		CR 171 SQL query CR172 SQL query CR174 SQL query

Lists patron purchase requests since 7-1-22. Details include fund code, LC class, subject, title, holdings location, PO line number, receipt date, request date, and amount. Filters include PO line receipt status and PO line payment status. <u>Note:</u> Requester name is not included to protect patron privacy, also it is often not available in the data.	Patron Purchase Requests		
Provides annual cost data for selected publishers/providers, with comparisons of annual changes, and of shares in total material expenditures. Bar graphs as well as tables provide different levels of detail; a forecast view at the end shows projected increases.	Cost by Publisher and Annual Material Expenditures, 2014 - 2023		N/A