Automated Selector Reports

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.

Access to these datasets is restricted to Cornell Library Selectors. Also see related Selector Data Dashboards. **These datasets are restricted to selectors and other authorized staff members.**

To inquire about access to these datasets, please submit a request through the Requesting Reporting Help form and specify that you would like access to selector datasets.

INSTRUCTIONS: To download daily report results in Excel format, click the link below to choose the desired dataset in the "Link to Daily Report Results in Box - Set 1 or Set 2."

Results sets are provided for all selector teams and individual selector teams.

Filtering and Sorting Data in Excel File Downloads for Automated Reports - step-by-step instructions

- CR101 Excel Download
- CR122 Excel Download
- CR123 Excel Download
- CR134 Excel Download
- CR138 Excel Download
- CR157 Excel Download
- CR165 Excel Download
- CR175 Excel Download
- CR204 Excel Download
- CR213 Excel Download

Report	Short Title	Description	Link to Daily Report Results in Box by Fiscal Year
CR101 Excel Download			
CR101 Excel Download	fund_expenditures_ by_po_line_i nvoice_pay ments	This report 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. Multiple fund groups appear by team due to split fund payments.	CR101 FY2024 for All Teams CR101 FY2023 for All Teams
CR122 Excel Download			
CR122 Excel Download	fund_detail	This query 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.	CR122 FY2024 for All Teams CR122 FY2023 for All Teams

CR123 Excel Download			
CR123 Excel download	open_orders	This report provides a list of open purchase orders and their encumbrance and/or amount paid, broken down by purchase order lines. Note that open orders without transactions will not appear in these results because a fiscal year has been selected.	CR123 FY2024 for All Teams CR123 FY2023 for All Teams
CR134 Excel Download			
CR134 Excel download	appr_invoices_bib_data	This report provides the list of approved invoices within a date range along with vendor name, invoice number, fund details and purchase order data.	CR134 FY24 for All Teams CR134 FY23 for All Teams
CR138 Excel Download			
CR138 Excel download	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.	CR138 FY24 for All Teams CR138 FY23 for All Teams
CR157 Excel Download			
CR157 Excel Download	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.	CR157 FY24 for All Teams CR157 FY23 for All Teams

CR165 Excel Download			
CR165 Excel Download	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).	CR165 FY24 for All Teams CR165 FY23 for All Teams
CR175 Excel Download			
CR175 Excel Download	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.	CR175 FY24 for All Teams CR175 FY23 for All Teams
CR204 Excel Download			
CR204 Excel Download	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. To view results for a particular library, sort your Excel file on the library_name column. To view results for a particular item status (e.g., Missing, Aged to Lost, Lost and Paid), sort your Excel file on the status_name column.	CR204
CR213 Excel Download			
CR213 Excel Download	current_encumbrances	This query finds current encumbrances by fund and fiscal year. It also shows titles and locations. --NOTE: As of 6/21/23, Fully Paid orders may still have a current encumbrance; this is a system issue to be fixed.	CR213 FY24 for All Teams CR213 FY23 for All Teams