

# FOLIO Reporting Team Updates

Date	Summary
4/4/24	<p>Reporting March 22 - April 4, 2024</p> <ul style="list-style-type: none"> <li>All reporting team members have completed review, categorization, and prioritization of both LDP reports and Tableau dashboards to be revised for Metadb</li> <li>Collaborating with Destop Services and Systems to test <a href="#">CloudBeaver</a> as possible replacement for Virtual DBeaver</li> <li>Reporting team experimenting with AI tools for creating, converting, and testing SQL queries</li> <li>Worked with EBSCO hosting team and Index Data devops on account setups, schema permissions, software updates, configuration changes, troubleshooting, support requirements, scheduling, and data sources for new Metadb Test reporting database</li> <li>Collaborated with co-convenor to prepare for and lead <a href="#">FOLIO Reporting SIG</a> meetings</li> <li>2 Metadb report queries in progress to covert from LDP format, tested, and published to the <a href="#">cul-folio-analytics repository</a></li> <li>4 new LDP report queries created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>2 new LDP report queries in progress for the <a href="#">cul-folio-analytics</a> GitHub repository targeted for completion by 4/18/24, and more on the way</li> <li>several Metadb report queries for the <a href="#">cul-folio-analytics</a> GitHub repository targeted for completion by 4/18/24, and more on the way</li> <li>18 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>8 Tableau dashboards in revision or test</li> <li>6 Tableau dashboards in development</li> <li>163 reporting help requests resolved via TDX since 7/1/21</li> <li>some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, and need for more development of the Receiving app</li> <li>See <a href="#">20240404 Full List of CUL Reports with Status</a> for full status report</li> </ul>
3/21/24	<p>Reporting March 8 - March 21, 2024</p> <ul style="list-style-type: none"> <li>All reporting team members reviewing, categorizing, and prioritizing LDP reports to be revised for Metadb and preparing to write new queries for Metadb only</li> <li>Reporting team experimenting with AI tools for creating, converting, and testing SQL queries</li> <li>Worked with hosting team and Index Data devops on account setups, schema permissions, software updates, configuration changes, support requirements and data sources for new Metadb Test reporting database</li> <li>Collaborated with co-convenor to prepare for and lead <a href="#">FOLIO Reporting SIG</a> meetings</li> <li>7 Metadb report queries converted from LDP format, tested, and published to the <a href="#">cul-folio-analytics repository</a></li> <li>2 Metadb report queries in progress to covert from LDP format, tested, and published to the <a href="#">cul-folio-analytics repository</a></li> <li>1 new Metadb-only report query written, tested, and published to the <a href="#">cul-folio-analytics repository</a></li> <li>3 new LDP report queries created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>3 new LDP report queries in progress for the <a href="#">cul-folio-analytics</a> GitHub repository targeted for completion by 4/4/24, and more on the way</li> <li>several Metadb report queries for the <a href="#">cul-folio-analytics</a> GitHub repository targeted for completion by 3/21/24, and more on the way</li> <li>19 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>7 Tableau dashboards in revision or test</li> <li>5 Tableau dashboards in development</li> <li>162 reporting help requests resolved via TDX since 7/1/21</li> <li>some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, and need for more development of the Receiving app</li> <li>See <a href="#">20240321 Full List of CUL Reports with Status</a> for full status report</li> </ul>
3/7/24	<p>Reporting February 23 - March 7, 2024</p> <ul style="list-style-type: none"> <li>All reporting team members reviewing, categorizing, and prioritizing LDP reports to be revised for Metadb and preparing to write new queries for Metadb only</li> <li>Worked with hosting team on account setups, software updates, configuration changes, support requirements and data sources for new Metadb Test reporting database</li> <li>Collaborated with co-convenor to prepare for and lead <a href="#">FOLIO Reporting SIG</a> meetings</li> <li>3 LDP report queries created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>3 new report queries for the <a href="#">cul-folio-analytics</a> GitHub repository targeted for completion by 3/21/24, and more on the way</li> <li>several Metadb report queries for the <a href="#">cul-folio-analytics</a> GitHub repository targeted for completion by 3/21/24, and more on the way</li> <li>19 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>7 Tableau dashboards in revision or test</li> <li>5 Tableau dashboards in development</li> <li>162 reporting help requests resolved via TDX since 7/1/21</li> <li>some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, and need for more development of the Receiving app</li> <li>See <a href="#">20240307 Full List of CUL Reports with Status</a> for full status report</li> </ul>

2/22 /24	<p>Reporting February 9 - February 22, 2024</p> <ul style="list-style-type: none"> <li>Delivered "Part 2" of Metadb Rollout Plan and Training Materials to prepare reporting users for the upcoming transition from the LDP to the Metadb reporting database system</li> <li>Continued testing CloudBeaver as an alternative to the Virtual DBeaver reporting application</li> <li>Worked with reference librarians and library systems on SpringShare data integration</li> <li>Worked with hosting team on account setups, software updates, configuration changes, support requirements and data sources for new Metadb Test reporting database</li> <li>Collaborated with co-convenor to prepare for and lead <a href="#">FOLIO Reporting SIG</a> meetings</li> <li>3 new report queries for the <a href="#">cul-folio-analytics</a> GitHub repository targeted for completion by 3/7/24, and more on the way</li> <li>19 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>7 Tableau dashboards in revision or test</li> <li>5 Tableau dashboards in development</li> <li>162 reporting help requests resolved via TDX since 7/1/21</li> <li>some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, and need for more development of the Receiving app</li> <li>See <a href="#">20240222 Full List of CUL Reports with Status</a> for full status report</li> </ul>
2/8/24	<p>Reporting January 26 - February 8, 2024</p> <ul style="list-style-type: none"> <li>Delivered "Part 1" of Metadb Rollout Plan and Training Materials to prepare reporting users for the upcoming transition from the LDP to the Metadb reporting database system</li> <li>Began testing CloudBeaver as an alternative to the Virtual DBeaver reporting application</li> <li>Worked with reference librarians and library systems on SpringShare data integration</li> <li>Worked with hosting team on account setups, software updates, configuration changes, support requirements and data sources for new Metadb Test reporting database</li> <li>Collaborated with co-convenor to prepare for and lead <a href="#">FOLIO Reporting SIG</a> meetings</li> <li>2 report queries created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>1 report query revised, tested, and re-published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>19 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>7 Tableau dashboards in revision or test</li> <li>5 Tableau dashboards in development</li> <li>162 reporting help requests resolved via TDX since 7/1/21</li> <li>some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, and need for more development of the Receiving app</li> <li>See <a href="#">20240208 Full List of CUL Reports with Status</a> for full status report</li> </ul>
1/25 /24	<p>Reporting January 12 - January 25, 2024</p> <ul style="list-style-type: none"> <li>Created Reporting Team Goals for 2024</li> <li>Worked on materials and plans for CUL presentations planned to cover upcoming transition from LDP to Metadb reporting database system</li> <li>Prepared for setup and testing for CloudBeaver as alternative to Virtual DBeaver</li> <li>Worked with reference librarians and library systems on SpringShare data integration</li> <li>Worked with hosting team on account setups, software updates, configuration changes, support requirements and data sources for new Metadb Test reporting database</li> <li>Collaborated with co-convenor to prepare for and lead <a href="#">FOLIO Reporting SIG</a> meetings</li> <li>1 reports created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>3 new report queries for the <a href="#">cul-folio-analytics</a> GitHub repository targeted for completion by 2/8/24, and more on the way</li> <li>18 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>5 Tableau dashboards in revision or test</li> <li>7 Tableau dashboards in progress or not started</li> <li>158 reporting help requests resolved via TDX since 7/1/21</li> <li>some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, and need for more development of the Receiving app</li> <li>See <a href="#">20240125 Full List of CUL Reports with Status</a> for full status report</li> </ul>
1/11 /24	<p>Reporting January 2 - January 11, 2024</p> <ul style="list-style-type: none"> <li>Worked on materials and plans for CUL presentations planned to cover upcoming transition from LDP to Metadb reporting database system</li> <li>Working with hosting team on account setups, software updates, configuration changes, support requirements and data sources for new Metadb Test reporting database</li> <li>Collaborated with co-convenor to prepare for and lead <a href="#">FOLIO Reporting SIG</a> meetings</li> <li>4 reports created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>3 new report queries for the <a href="#">cul-folio-analytics</a> GitHub repository targeted for completion by 1/25/24, and more on the way</li> <li>18 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>5 Tableau dashboards in revision or test</li> <li>7 Tableau dashboards in progress or not started</li> <li>157 reporting help requests resolved via TDX since 7/1/21</li> <li>some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, and need for more development of the Receiving app</li> <li>See <a href="#">20240111 Full List of CUL Reports with Status</a> for full status report</li> </ul>

12/7 /23	<p>Reporting November 23 - December 7, 2023</p> <ul style="list-style-type: none"> <li>• Worked on materials and plans for CUL presentations planned to cover upcoming transition from LDP to Metadb reporting database system</li> <li>• Reporting team user accounts created and tested for access to new Metadb Test reporting database</li> <li>• Working with hosting team on account setups, software updates, configuration changes, support requirements and data sources for new Metadb Test reporting database</li> <li>• Collaborated with co-convenor to prepare for and lead <a href="#">FOLIO Reporting SIG</a> meetings</li> <li>• Several derived tables updated and merged for the <a href="#">folio-analytics</a> GitHub repository merged for 1.7 Poppy release</li> <li>• Several derived tables reviewed and tested for the <a href="#">folio-analytics</a> GitHub repository submitted for 1.7 Poppy release</li> <li>• 2 reports created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 4 new report queries for the <a href="#">cul-folio-analytics</a> GitHub repository targeted for completion by 1/11/24, and more on the way</li> <li>• 18 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 5 Tableau dashboards in revision or test</li> <li>• 7 Tableau dashboards in progress or not started</li> <li>• 155 reporting help requests resolved via TDX since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">20231207 Full List of CUL Reports with Status</a> for full status report</li> </ul>
11/22 /23	<p>Reporting November 9 - November 22, 2023</p> <ul style="list-style-type: none"> <li>• Worked on materials and plans for CUL presentations planned to cover upcoming transition from LDP to Metadb reporting database system</li> <li>• Contributed to and led the <a href="#">FOLIO Analytics Code Review Board</a> for the 1.7 Poppy release</li> <li>• Collaborated with co-convenor to prepare for and lead <a href="#">FOLIO Reporting SIG</a> meetings</li> <li>• 1 derived table for the <a href="#">folio-analytics</a> GitHub repository merged for 1.7 Poppy release</li> <li>• 5 derived tables for the <a href="#">folio-analytics</a> GitHub repository submitted for 1.7 Poppy release</li> <li>• 5 derived tables for the <a href="#">folio-analytics</a> GitHub repository reviewed for 1.7 Poppy release</li> <li>• 1 report created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 7 new report queries for the <a href="#">cul-folio-analytics</a> GitHub repository targeted for completion by 12/7/23, and more on the way</li> <li>• 18 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 5 Tableau dashboards in revision or test</li> <li>• 7 Tableau dashboards in progress or not started</li> <li>• 155 reporting help requests resolved via TDX since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">20231122 Full List of CUL Reports with Status</a> for full status report</li> </ul>
11/9 /23	<p>Reporting October 27 - November 9, 2023</p> <ul style="list-style-type: none"> <li>• Worked on materials and plans for CUL presentations planned to cover upcoming transition from LDP to Metadb reporting database system</li> <li>• Launched the <a href="#">FOLIO Analytics Code Review Board</a> for the 1.7 Poppy release</li> <li>• Participating in <a href="#">BugFest for Poppy</a> to test the Reporting App</li> <li>• Collaborated with co-convenor to prepare for and lead <a href="#">FOLIO Reporting SIG</a> meetings</li> <li>• 1 derived table for the <a href="#">folio-analytics</a> GitHub repository merged for 1.7 Poppy release</li> <li>• 5 derived tables for the <a href="#">folio-analytics</a> GitHub repository submitted for 1.7 Poppy release</li> <li>• 5 derived tables for the <a href="#">folio-analytics</a> GitHub repository reviewed for 1.7 Poppy release</li> <li>• 1 report created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 6 new report queries for the <a href="#">cul-folio-analytics</a> GitHub repository targeted for completion by 11/22/23, and more on the way</li> <li>• 18 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 5 Tableau dashboards in revision or test</li> <li>• 7 Tableau dashboards in progress or not started</li> <li>• 154 reporting help requests resolved via TDX since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">20231109 Full List of CUL Reports with Status</a> for full status report</li> </ul>

10/26 /23	<p>Reporting October 13 - October 26, 2023</p> <ul style="list-style-type: none"> <li>• Worked on materials and plans for CUL presentations planned to cover upcoming transition from LDP to Metadb reporting database system</li> <li>• Launched the <a href="#">FOLIO Analytics Code Review Board</a> for the 1.7 Poppy release</li> <li>• Participating in <a href="#">BugFest for Poppy</a> to test the Reporting App</li> <li>• Collaborated with co-convenor to prepare for and lead <a href="#">FOLIO Reporting SIG</a> meetings</li> <li>• 1 derived table for the <a href="#">folio-analytics</a> GitHub repository merged for 1.7 Poppy release</li> <li>• 5 derived tables for the <a href="#">folio-analytics</a> GitHub repository in progress for 1.7 Poppy release</li> <li>• 5 derived tables for the <a href="#">folio-analytics</a> GitHub repository in review for 1.7 Poppy release</li> <li>• 3 reports created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 5 new report queries for the <a href="#">cul-folio-analytics</a> GitHub repository targeted for completion by 11/9/23, and more on the way</li> <li>• On the <a href="#">CUL section of Cornell's Tableau Server (libr-folio)</a>, replaced the "librgroup - folio - All Staff" Tableau permissions group with our the Active Directory Tableau permissions group "LIB-CUnivLibrary-AllStaff-gs" on each of our Tableau dashboards needing all-staff access, which means we no longer need to manually maintain our all-staff permissions group</li> <li>• 18 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 5 Tableau dashboards in revision or test</li> <li>• 7 Tableau dashboards in progress or not started</li> <li>• 154 reporting help requests resolved via TDX since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">20231026 Full List of CUL Reports with Status</a> for full status report</li> </ul>
10/12 /23	<ul style="list-style-type: none"> <li>• Following the recent location changes in the FOLIO system, we noticed some location data that was making report results inaccurate or misleading, so we created and shared reports showing Location changes impacting data quality with the LTS data quality management and automation groups, who will follow up to fix the data</li> <li>• Worked on materials and plans for CUL presentations planned to cover upcoming transition from LDP to Metadb reporting database system</li> <li>• Worked with reporting product owner, LDP/Metadb director, and Reporting SIG report development teams to establish FOLIO Analytics code completion schedule and launch FOLIO Analytics Code Review Board for Poppy</li> <li>• Collaborated with co-convenor to prepare for and lead FOLIO Reporting SIG meetings</li> <li>• Updated several queries to exclude inactivated locations from reports and dashboards</li> <li>• Updated library location names and codes in the <a href="#">FOLIO Reports Filter Directory</a> to match recent location updates in FOLIO Production</li> <li>• 3 reports created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 2 new report queries targeted for completion by 10/26/23, and more on the way</li> <li>• 18 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 5 Tableau dashboards in revision or test</li> <li>• 7 Tableau dashboards in progress or not started</li> <li>• 154 reporting help requests resolved via TDX since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">20231012 Full List of CUL Reports with Status</a> for full status report</li> </ul>
9/28 /23	<ul style="list-style-type: none"> <li>• Updated and Tested Locations Translation table in the local schemas in the LDP after library location names changed in FOLIO to ensure proper locations are shown in LDP reports and dashboards</li> <li>• Worked on materials for presentations planned to cover upcoming transition from LDP to Metadb reporting infrastructure system</li> <li>• Updating several queries to exclude inactivated locations from key record counts for reports and dashboards</li> <li>• Updated library location names and codes in the <a href="#">FOLIO Reports Filter Directory</a> to match recent updates in FOLIO Production</li> <li>• 1 reports revised, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 5 new report queries targeted for completion by 10/12/23, and more on the way</li> <li>• 18 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 5 Tableau dashboards in revision or test</li> <li>• 7 Tableau dashboards in progress or not started</li> <li>• 154 reporting help requests resolved via TDX since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">20230928 Full List of CUL Reports with Status</a> for full status report</li> </ul>
9/14 /23	<p>Reporting Sept 1 - September 14, 2023</p> <ul style="list-style-type: none"> <li>• Delivered "Troubleshooting SQL" presentation at <a href="#">FOLIO Reporting SIG meeting on 9/7/23</a></li> <li>• Testing changes to library location names and codes in FOLIO Test and LDP Test for impacts on queries and dashboards</li> <li>• 2 reports revised, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 2 reports updated for fiscal year 2024 including automation updates</li> <li>• 3 new report queries targeted for completion by 9/28/23, and more on the way</li> <li>• 18 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 5 Tableau dashboards in revision or test</li> <li>• 7 Tableau dashboards in progress or not started</li> <li>• 147 reporting help requests resolved via TDX since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">20230914 Full List of CUL Reports with Status</a> for full status report</li> </ul>

8/31/23	<p>Reporting August 18 - August 31, 2023</p> <ul style="list-style-type: none"> <li>Delivered 2 presentations at WOLFcon 2023: "Experiences of Institutions with FOLIO Reporting" and "Getting Started with FOLIO Reporting"</li> <li>Coordinated and moderated 5 WOLFcon 2023 reporting presentations on behalf of Reporting SIG and served on the WOLFcon 2023 planning team</li> <li>Testing changes to library location names and codes in FOLIO Test and LDP Test for impacts on queries and dashboards</li> <li>1 new report queries created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>2 reports revised, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>2 reports updated for fiscal year 2024 including automation updates</li> <li>3 new report queries targeted for completion by 9/14/23, and more on the way</li> <li>18 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>5 Tableau dashboards in revision or test</li> <li>7 Tableau dashboards in progress or not started</li> <li>146 reporting help requests resolved via TDX since 7/1/21</li> <li>some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>See <a href="#">20230831 Full List of CUL Reports with Status</a> for full status report</li> </ul>
8/17/23	<p>Reporting August 3 - August 17, 2023</p> <ul style="list-style-type: none"> <li>Worked on planning, scheduling, and coordination of all Reporting SIG topics for upcoming WOLFcon 2023 conference</li> <li>Prepared content to deliver 2 presentations at WOLFcon 2023: "Experiences of Institutions with FOLIO Reporting" and "Getting Started with FOLIO Reporting"</li> <li>Updated several financial report queries to include data for new fiscal year FY2024</li> <li>Testing changes to library location names and codes in FOLIO Test and LDP Test for impacts on queries and dashboards</li> <li>3 new report queries created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>3 reports updated for fiscal year 2024 including automation updates</li> <li>2 new report queries targeted for completion by 8/31/23, and more on the way</li> <li>18 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>5 Tableau dashboards in revision or test</li> <li>7 Tableau dashboards in progress or not started</li> <li>146 reporting help requests resolved via TDX since 7/1/21</li> <li>some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>See <a href="#">20230817 Full List of CUL Reports with Status</a> for full status report</li> </ul>
8/3/23	<p>Reporting July 7 - August 3, 2023</p> <ul style="list-style-type: none"> <li>Recruited Scott Perry, University of Chicago, to be new co-convener for the FOLIO Reporting SIG along with Sharon as Angela Zoss (Duke) leaves the position</li> <li>Worked on planning, scheduling, and coordination of all Reporting SIG topics for upcoming WOLFcon 2023 conference</li> <li>Moved to new versions of LDP software components on LDP Test – LDP 1.9.1 and Folio Analytics 1.6 – to support move to FOLIO Orchid release and to test and prepare for updating to these software components on LDP Production</li> <li>Updating several report queries and Tableau dashboards to include data for new fiscal year, FY2024</li> <li>Reviewing list of August updates to library location names and codes in FOLIO for impacts on queries and dashboards</li> <li>4 new report queries created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>3 reports revised, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>4 new report queries targeted for completion by 8/17/23, and more on the way</li> <li>17 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>5 Tableau dashboards in revision or test</li> <li>5 Tableau dashboards in progress or not started</li> <li>143 reporting help requests resolved via TDX since 7/1/21</li> <li>some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>See <a href="#">20230803 Full List of CUL Reports with Status</a> for full status report</li> </ul>
7/6/23	<p>Reporting June 23 - July 6, 2023</p> <ul style="list-style-type: none"> <li>Completed analysis of Metadb Development Priorities with operations and automation teams</li> <li>Preparing for move to <a href="#">Orchid 1.6 derived tables</a> on LDP Test and LDP Production reporting databases</li> <li>Reviewing list of July updates to library location names and codes in FOLIO for impacts on queries and dashboards</li> <li>5 new report queries created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>1 report revised, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>2 new report queries targeted for completion by 8/3/23, and more on the way</li> <li>15 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>5 Tableau dashboards in revision or test</li> <li>6 Tableau dashboards in progress or not started</li> <li>142 reporting help requests resolved via TDX since 7/1/21</li> <li>some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>See <a href="#">20230706 Full List of CUL Reports with Status</a> for full status report</li> </ul>



6/22 /23	<p>Reporting June 9 - June 22, 2023</p> <ul style="list-style-type: none"> <li>• Preparing for move to <a href="#">Orchid 1.6 derived tables</a> on LDP Test and LDP Production reporting databases</li> <li>• Reviewing list of June-July updates to library location names and codes in FOLIO for impacts on queries and dashboards</li> <li>• 1 new report queries created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 7 new report queries targeted for completion by 7/6/23, and more on the way</li> <li>• 13 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 6 Tableau dashboards in revision or test</li> <li>• 8 Tableau dashboards in progress or not started</li> <li>• New "one-stop-shop" grid for Access Services data added to <a href="#">FOLIO Reporting</a> site <ul style="list-style-type: none"> <li>◦ <a href="#">Access Services Dashboards &amp; Excel Reports</a></li> </ul> </li> <li>• 142 reporting help requests resolved via TDX since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">20230622 Full List of CUL Reports with Status</a> for full status report</li> </ul>
6/8/23	<p>Reporting May 26 - June 8, 2023</p> <ul style="list-style-type: none"> <li>• Completed <a href="#">FOLIO Reporting SIG's WOLFcon 2023 Submission</a> of presentations, workshops, working meetings, panel discussions, etc.</li> <li>• Preparing for move to <a href="#">Orchid 1.6 derived tables</a> on LDP Test and LDP Production reporting databases</li> <li>• Reviewing list of June-July updates to library names and library codes for impacts on queries and dashboards</li> <li>• 4 new report queries created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 3 new report queries targeted for completion by 6/21/23, and more on the way</li> <li>• 13 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 6 Tableau dashboards in revision or test</li> <li>• 8 Tableau dashboards in progress or not started</li> <li>• New "one-stop-shop" grid for Annual Data Collection data added to <a href="#">FOLIO Reporting</a> site <ul style="list-style-type: none"> <li>◦ <a href="#">Annual Data Collection Dashboards &amp; Excel Reports</a></li> </ul> </li> <li>• 141 reporting help requests resolved via TDX since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">20230608 Full List of CUL Reports with Status</a> for full status report</li> </ul>
5/25 /23	<p>Reporting May 12 - May 25, 2023</p> <ul style="list-style-type: none"> <li>• Preparing FOLIO Reporting SIG's submission of presentations, workshops, working meetings, panel discussions, etc. for WOLFcon 23 conference</li> <li>• Preparing for move to <a href="#">Orchid 1.6 derived tables</a> on LDP Test and LDP Production reporting databases</li> <li>• Preparing for June-July updates to library names and library codes in queries and dashboards</li> <li>• 5 new report queries created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 7 new report queries targeted for completion by 6/8/23, and more on the way</li> <li>• 13 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 6 Tableau dashboards in revision or test</li> <li>• 8 Tableau dashboards in progress or not started</li> <li>• New documentation added to <a href="#">FOLIO Reporting</a> site <ul style="list-style-type: none"> <li>◦ <a href="#">Parsing Out Call Numbers</a> under SQL Tips and Tricks</li> </ul> </li> <li>• 140 reporting help requests resolved via TDX since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">2023525 Full List of CUL Reports with Status</a> for full status report</li> </ul>
5/11 /23	<p>Reporting April 28 - May 11, 2023</p> <ul style="list-style-type: none"> <li>• Worked with Reporting SIG members and co-convenor to gather reporting solution by institution listings <ul style="list-style-type: none"> <li>◦ see <a href="#">Reporting Implementation by Institution</a> page in the FOLIO Reporting SIG wiki</li> </ul> </li> <li>• New "local_protected" schema added to LDP Test and LDP Production to store tables capturing daily updates that cannot be deleted</li> <li>• Preparing for move to <a href="#">Orchid 1.6 derived tables</a> on LDP Test and LDP Production reporting databases</li> <li>• Preparing for June-July updates to library names and library codes in queries and dashboards</li> <li>• "<a href="#">Review of LDP Derived Table Updates for Orchid 1.6</a>" presentation delivered to FOLIO Reporting Users Group meeting Monday, May 8, 2023</li> <li>• 1 new report queries created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 6 new report queries targeted for completion by 5/24/23, and more on the way</li> <li>• 13 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 6 Tableau dashboards in revision or test</li> <li>• 8 Tableau dashboards in progress or not started</li> <li>• New documentation added to <a href="#">FOLIO Reporting</a> site <ul style="list-style-type: none"> <li>◦ <a href="#">Accessing and Using Data Dashboards</a></li> <li>◦ <a href="#">Filtering and Sorting Data in Excel File Downloads for Automated Reports</a></li> </ul> </li> <li>• 140 reporting help requests resolved via TDX since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">2023511 Full List of CUL Reports with Status</a> for full status report</li> </ul>

4/27 /23	<p>Reporting April 14 - April 27, 2023</p> <ul style="list-style-type: none"> <li>• 2 new report queries created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 3 new report queries targeted for completion by 4/27/23, and more on the way</li> <li>• 13 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 6 Tableau dashboards in revision or test</li> <li>• 8 Tableau dashboards in progress or not started</li> <li>• 140 reporting help requests resolved via TDX since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">20230427 Full List of CUL Reports with Status</a> for full status report</li> </ul>
4/13 /23	<p>Reporting March 18 - April 13, 2023</p> <ul style="list-style-type: none"> <li>• "Use of the LDP in Library Automation" presentation by LTS Automation Team and delivered at FOLIO Reporting Users Group meeting Monday, April 10</li> <li>• 3 new report queries created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 5 new report queries targeted for completion by 4/27/23, and more on the way</li> <li>• 13 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 4 Tableau dashboards in revision or test</li> <li>• 7 Tableau dashboards in progress or not started</li> <li>• 140 reporting help requests resolved via TDX since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">20230413 Full List of CUL Reports with Status</a> for full status report</li> </ul>
3/30 /23	<p>Reporting March 17 - March 30, 2023</p> <ul style="list-style-type: none"> <li>• <a href="#">FOLIO Acquisitions and Electronic Resource Management Data Model Training</a> developed and delivered over 2 Reporting SIG meetings</li> <li>• 16 derived tables updated for LDP, converted to Metadb format, and submitted to the <a href="#">FOLIO-Analytics repository</a> for the Orchid 1.6 of Folio Analytics (see Orchid 1.6 worksheet in full status report)</li> <li>• 7 derived tables reviewed, tested, and approved for publication to the <a href="#">FOLIO-Analytics repository</a> for the Orchid 1.6 of Folio Analytics (see Orchid 1.6 worksheet in full status report)</li> <li>• Reporting Team has completed testing 60 queries on LDP Test for impacts and making code changes as needed to prepare for the move from Folio Analytics version 1.4 to version 1.5 on LDP Production</li> <li>• Hosting services will update LDP Production to version Idpmarc 1.6.3 and Folio Analytics 1.6 on 3/31/23 (see <a href="#">LDP Software Update Schedule</a>)</li> <li>• 4 new report queries targeted for completion by 4/13/23, and more on the way</li> <li>• 13 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 4 Tableau dashboards in revision or test</li> <li>• 7 Tableau dashboards in progress or not started</li> <li>• 139 reporting help requests resolved since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">20230330 Full List of CUL Reports with Status</a> for full status report</li> </ul>
3/16 /23	<p>Reporting March 3 - March 16, 2023</p> <ul style="list-style-type: none"> <li>• Reporting Team has been testing 60 queries on LDP Test for impacts and making code changes as needed to prepare for the move from Folio Analytics version 1.4 to version 1.5 on LDP Production</li> <li>• 1 report query created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 3 new report queries targeted for completion by 3/30/23, and more on the way</li> <li>• 13 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 3 new Tableau dashboards completed</li> <li>• 4 Tableau dashboards in revision or test</li> <li>• 5 Tableau dashboards in progress or not started</li> <li>• several derived tables updated for LDP, converted to Metadb format, and published to the <a href="#">FOLIO-Analytics repository</a> for the Orchid 1.6 of Folio Analytics</li> <li>• 139 reporting help requests resolved since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">20230316 Full List of CUL Reports with Status</a> for full status report</li> </ul>

3/2/23	<p>Reporting February 3 - March 2, 2023:</p> <ul style="list-style-type: none"> <li>• Milestone: <b>100</b> report queries developed, tested, and published by the FOLIO Reporting Team!</li> <li>• "Troubleshooting SQL Queries" presentation delivered to FOLIO Reporting Users Group on 2/27/23</li> <li>• 1 report query revised, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 11 new report queries created, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 2 new report queries targeted for completion by 3/16/22, and more on the way</li> <li>• 13 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 3 new Tableau dashboards completed</li> <li>• 4 Tableau dashboards in revision or test</li> <li>• 5 Tableau dashboards in progress or not started</li> <li>• several derived tables converted to Metadb format and published to the <a href="#">FOLIO-Analytics repository</a> for Orchid 1.6</li> <li>• 139 reporting help requests resolved since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on the availability of a MetaDB Test instance</li> <li>• See <a href="#">20230302 Full List of CUL Reports with Status</a> for full status report</li> </ul>
2/2/23	<p>Reporting January 20 - February 2, 2023:</p> <ul style="list-style-type: none"> <li>• 3 report queries revised, tested, and published to the <a href="#">CUL report directory</a> and <a href="#">cul-folio-analytics repository</a></li> <li>• 3 new report queries targeted for completion by 3/2/22, and more on the way</li> <li>• 14 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 3 new Tableau dashboards completed</li> <li>• 3 Tableau dashboards in revision or test</li> <li>• 3 new Tableau dashboards in progress or not started</li> <li>• several derived tables converted to Metadb format and published to the <a href="#">FOLIO-Analytics repository</a> for Orchid 1.6</li> <li>• 138 reporting help requests resolved since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on official release of MetaDB</li> <li>• See <a href="#">20230202 Full List of CUL Reports with Status</a> for full status report</li> </ul>
1/19/23	<p>Reporting December 21, 2022 - January 19, 2023:</p> <ul style="list-style-type: none"> <li>• 1 new report query developed and published to the <a href="#">report directory</a></li> <li>• 2 new report queries targeted for completion by 2/2/22, and more on the way</li> <li>• 14 Tableau dashboards active on the <a href="#">libr-folio section</a> of Cornell's Tableau server</li> <li>• 3 new Tableau dashboards completed</li> <li>• 3 Tableau dashboards in revision or test</li> <li>• 3 new Tableau dashboards in progress or not started</li> <li>• 138 reporting help requests resolved since 7/1/21</li> <li>• some report development blocked due to FOLIO application development issues (see <a href="#">LDP Known Issues</a>), lack of access to eHoldings data, need for more development of the Receiving app, and dependence on official release of MetaDB</li> <li>• see <a href="#">20230119 Full List of CUL Reports with Status.xlsx</a> for full status report</li> </ul>