
Data Insights: Getting Started with the FOLIO Lists App and Panorama

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Overview

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Note on Screenshots

Due to the Dress Rehearsal load, our FOLIO environment was not available for these screenshots. Instead Miriam used this snapshot FOLIO environment for the Lists App screenshots:

<https://folio-snapshot.dev.folio.org/>

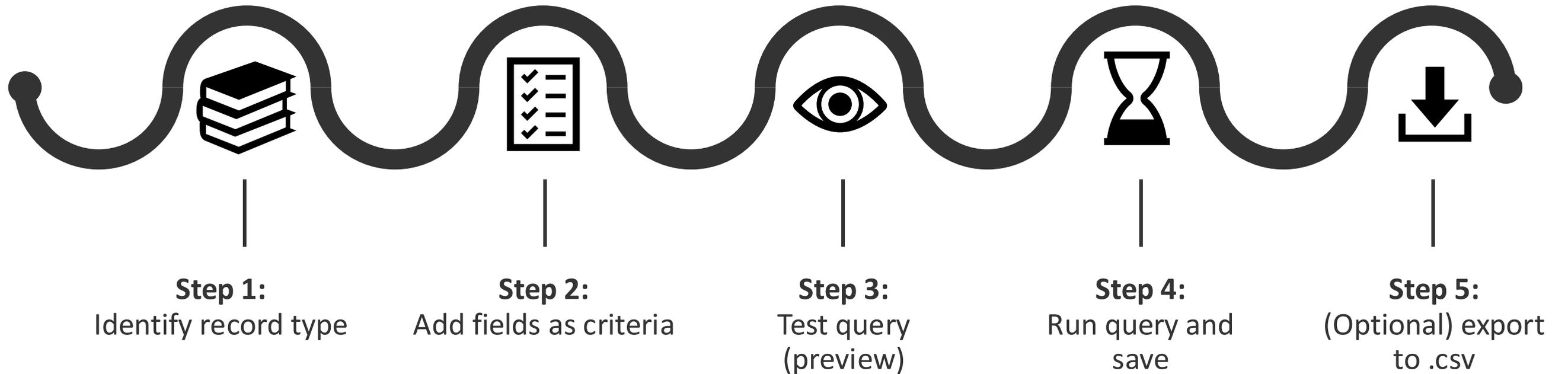
For more information about this and other demo sites, please see the *Resources* slide at the end of this presentation.

LISTS APP OVERVIEW

Lists App Overview

- Can create lists across FOLIO apps and record types (instance, user, etc.)
- Use for reports that you need on a repeating basis or for reports that are not available in FOLIO
- Reports can be filtered by status, visibility, or record type
- Each list can contain up to 1.25 million records
- Lists app can only report on records, not update them
 - To edit fields, use the Bulk Edit app
- Still in development; averaging between 3 and 5 new entities per release

General Lists App Process



Lists App Considerations

Opportunities

- No need to know SQL or other languages to create lists
- Lists can be exported to .CSV for further filtering or investigation
- You can select additional fields to include in the list before save, and again before export
- Queries can be tested to preview the record set of the list and help you refine your search criteria

Challenges

- Does not have a folder structure
- Cannot report on MARC fields
- Cannot create a list from an uploaded text file
 - To do create from an input file, use the Data Import app (.csv file only, with no headers)
- Uses only the AND operator
 - No word yet on when OR and NOT will be available, as the focus has been on making more data available and improving performance*

*Source: Moore, Kathleen. (2024, May 21). FOLIO Slack, #bela-bulk-edits-;list-app-working group channel. https://open-libr-foundation.slack.com/archives/C02FSGFL6EQ/p1716290202153349?thread_ts=1716283825.398649&cid=C02FSGFL6EQ

New in Ramsons Release

- FQM permission: to create a list you will need permissions for the Lists App **and** the content type
- For example, to run a users report in the Lists app, you will need:
 - Permissions to access the Lists app
 - Permissions to call on the users app that you will be accessing in the Lists app
- This is a way to protect sensitive information from being exposed

Future Plans

- Trillium release:
 - Allow users to combine (or join) different types of records in a single list*

Navigation bar: Lists, Agreements, Bulk edit, Check in, Check out, Circulation log, Claiming, Apps, Online

Filter: Filter < Lists 4 records found New

List name	Record type	Records	Status	Source	Last updated
C451506	Organizations	17	Active	ADMINISTRATOR, DIKU	5/8/2025 11:56 AM
Inactive patrons with open loans	Loans	0	Active	System	
Missing items	Items	0	Active	System	
test1	Budgets	23	Active	ADMINISTRATOR, DIKU	5/8/2025 11:32 AM

Filter sidebar: Reset all, Status (Active checked, Inactive unchecked), Visibility (Shared unchecked, Private unchecked), Record types

USING THE LISTS APP

Lists App Default Reports

- Each tenant contains two default lists that you can refresh as needed:
 - inactive patrons report (who still have loans)
 - missing items report

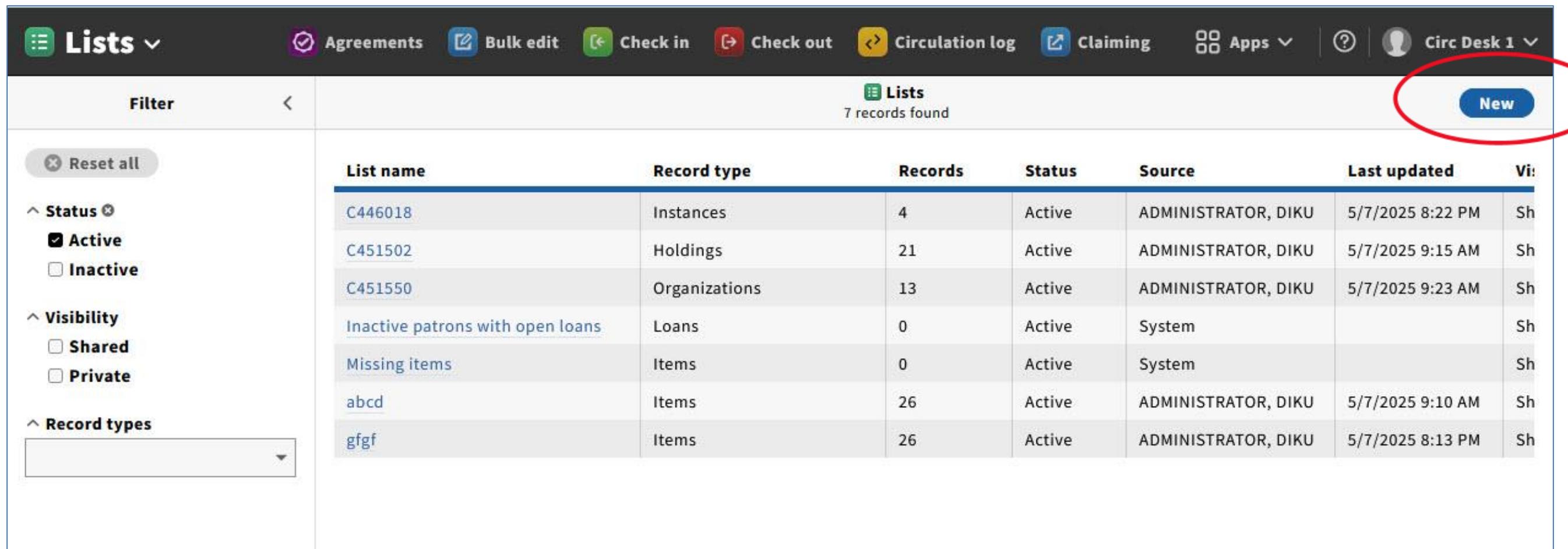
The screenshot shows the Lists App interface. At the top, there is a navigation bar with icons for Lists, Agreements, Bulk edit, Check in, Check out, Circulation log, Claiming, Apps, and Online. Below the navigation bar, there is a header section with a 'Filter' button, a 'Lists' title, '4 records found', and a 'New' button. The main content area is a table with the following columns: List name, Record type, Records, Status, Source, and Last updated. The table contains four records:

List name	Record type	Records	Status	Source	Last updated
C451506	Organizations	17	Active	ADMINISTRATOR, DIKU	5/8/2025 11:56 AM
Inactive patrons with open loans	Loans	0	Active	System	
Missing items	Items	0	Active	System	
test1	Budgets	23	Active	ADMINISTRATOR, DIKU	5/8/2025 11:32 AM

On the left side of the table, there is a filter sidebar with a 'Reset all' button and two sections: 'Status' with 'Active' (checked) and 'Inactive' (unchecked) options, and 'Visibility' with 'Shared' and 'Private' (both unchecked) options.

Creating a New List

- Click the New button in the upper right corner of the screen
 - Lists are required to have a name and a record type



The screenshot displays the 'Lists' management interface. At the top, a navigation bar includes 'Lists' (selected), 'Agreements', 'Bulk edit', 'Check in', 'Check out', 'Circulation log', 'Claiming', 'Apps', and 'Circ Desk 1'. Below the navigation bar, a 'Filter' sidebar on the left contains options for 'Reset all', 'Status' (Active/Inactive), 'Visibility' (Shared/Private), and 'Record types'. The main area shows a table of lists with 7 records found. A blue 'New' button is circled in red in the upper right corner of the table area.

List name	Record type	Records	Status	Source	Last updated	Vi:
C446018	Instances	4	Active	ADMINISTRATOR, DIKU	5/7/2025 8:22 PM	Sh
C451502	Holdings	21	Active	ADMINISTRATOR, DIKU	5/7/2025 9:15 AM	Sh
C451550	Organizations	13	Active	ADMINISTRATOR, DIKU	5/7/2025 9:23 AM	Sh
Inactive patrons with open loans	Loans	0	Active	System		Sh
Missing items	Items	0	Active	System		Sh
abcd	Items	26	Active	ADMINISTRATOR, DIKU	5/7/2025 9:10 AM	Sh
gfgf	Items	26	Active	ADMINISTRATOR, DIKU	5/7/2025 8:13 PM	Sh

Record Types: Acquisitions

Record Type	Can create lists for
Purchase order lines	POL, POL Created by User, POL Updated by User, Exchange Rate, PO, PO Assigned to User, PO Created by User, PO Updated by User, Vendor Org
Organizations	(several fields in the Organization record)

Record Types: Cataloging

Record Type	Can create lists for
Holdings	Holdings, Effective Library, Effective Location, Permanent Location, Temporary Location
Instances	Instance, Instance Date Type, Instance Status
Items	Items, Item Call Number, Effective Call Number, Material Type, Instances, Holdings, Effective Library, Effective Location, Permanent Location, Temporary Location, Permanent Loan Type, Temporary Loan Type

Record Types: Circulation

Record Type	Can create lists for
Users	Anonymize Closed Loans, Anonymize Closed Requests, Patron Group, User
Loans	Loan, Loan Policy, User, Patron Group, Material Type, Item, Item Permanent Loan Type, Item Temporary Loan Type, Instances, Holdings, Check in Service Point, Check out Service Point

List Visibility

- When creating a list, you can choose whether a list should be shared or private
 - Shared: the people in your tenant who have user permissions to access the Lists app can see your list
 - Private: only you can see your list

List Status

- Active: list contains a query and resultant record set
- Inactive: list contains only a query
 - These saved lists cannot be refreshed until they are saved as “Active”

Using Lists

- After saving a list, you can select the columns that you want in your export, or just select “All columns”
- List app can be used at the consortial level or the member tenant level
 - Consortial level: can run queries for the full ECS member tenant, not just the member sites
 - Member tenant level: can run queries only within your tenant
- You can delete a list when it is no longer needed

Lists App Queries

- The only Boolean operator available is AND
- The “In” operator includes OR statements between the items selected for that operator

LISTS APP USE CASE

Use Case #1:

Lost Items Attached to
Unsuppressed Records

Suppress Lost Items

- At UWG, we suppress the parent bibs of items that have been lost for more than 1 year
- This list will use the “Item” record type so that we can use both item and instance fields in our query

Supress Lost Items: Create List

- Name the list and select the correct Record Type:

✕ **New list**
Set criteria to build query

[Collapse all](#)

^ **List information**

List name *

Lost items attached to unsuppressed bibs

Description

Record type *

Items

Visibility ⓘ **Status** ⓘ

Shared Private Active Inactive

Build query

Add Item Status Criterion

- Field: Items – Status
- Operator: In
- Value: Aged to Lost; Declared Lost
 - Note: There is also a "Lost and Paid" status; use if appropriate for your institution

× **Build query**

Query

```
(items.status_name in [Aged to lost, Declared lost])
```

Field	Operator	Value	Actions
Items — Status	in	Aged to lost × Declared lost ×	+

Test query

Add Suppression Criterion

- Click the + under the Actions column to add another row
- Field: Instances – Suppress from discovery
- Operator: Equals
- Value: False

Build query

Query

```
(items.status_name in [Aged to lost, Declared lost]) AND (instances.discovery_suppress == false)
```

Boolean	Field	Operator	Value	Actions
	Items — Status	in	Aged to lost × Declared lost ×	+ 🗑
AND	Instances — Suppress from discovery	equals	False	+ 🗑

Test query

Add Status Date Criterion

- Click the + under the Actions column to add another row
- Field: Items – Status Date
- Operator: less than or equal to
- Value: (enter a date one year in the past)

 Build query

Query

```
(items.status_name in [Aged to lost, Declared lost]) AND (instances.discovery_suppress == false) AND (items.status_date <= 05/07/2024)
```

Boolean	Field	Operator	Value	Actions
	Items – Status	in	Aged to lost × Declared lost ×	+ 
AND ▼	Instances – Suppress from discovery	equals	False	+ 
AND ▼	Items – Status date	less than or equal to	05/08/2024  	+ 

[Test query](#)

Preview

Note: Since there are no items in the FOLIO test environment that match my query criteria, I will change the Item status to “checked out” so that I can continue with this use case.

Preview: Test Query

- Click “Test Query” to see a preview of the records that would be returned
 - Up to 100 records can be previewed

[Test query](#)

Query would return 4 records. Preview of first 4 records. [Show columns ▾](#)

Items — Effective call number	Items — Status	Items — Status date	Items — Updated date	Material type — Name
R11.A38, c.1	Checked out	5/8/2025	5/8/2025	book
TK5105.88815 . A58 2004 FT MEADE, Copy 2	Checked out	5/8/2025	5/8/2025	book
D15.H63 A3 2002	Checked out	5/8/2025	5/8/2025	book
M1366.S67 T73 2017	Checked out	5/8/2025	5/8/2025	book

[Cancel](#) [Run query & save](#)

Preview: Show Columns

- Use the “Show columns” menu to select the columns you would like in your final report

The screenshot displays a query preview interface. At the top left is a 'Test query' button. Below it, a message states 'Query would return 4 records. Preview of first 4 records.' A table with five columns is shown: 'Items — Status', 'Items — Status date', 'Material type — Name', 'Instances — Instance HRID', and 'Instance'. The table contains four rows of data, all with a status of 'Checked out' and a date of '5/8/2025'. The material type is 'book' for all rows. The instance HRIDs are 'inst000000000003', 'inst000000000022', 'inst000000000017', and 'inst000000000025'. The instance names are partially visible as 'The Ame', 'A seman', 'Interesti', and 'Transpa'. On the right side, a 'Show columns' menu is open, featuring a search field and a list of columns with checkboxes. The columns listed are: 'Items — Accession number', 'Items — Administrative notes', 'Items — Barcode', 'Items — Chronology', 'Items — Copy number', 'Items — Created date', 'Items — Description of pieces', and 'Items — Display summary'. At the bottom left is a 'Cancel' button, and at the bottom right is a 'Run query & save' button.

Test query

Query would return 4 records. Preview of first 4 records.

Items — Status	Items — Status date	Material type — Name	Instances — Instance HRID	Instance
Checked out	5/8/2025	book	inst000000000003	The Ame
Checked out	5/8/2025	book	inst000000000022	A seman
Checked out	5/8/2025	book	inst000000000017	Interesti
Checked out	5/8/2025	book	inst000000000025	Transpa

Show columns

Search fields

- Items — Accession number
- Items — Administrative notes
- Items — Barcode
- Items — Chronology
- Items — Copy number
- Items — Created date
- Items — Description of pieces
- Items — Display summary

Cancel

Run query & save

Save List

- Click the “Run query and save” button to save your list. The following screen will appear:

Lists Agreements Bulk edit Check in Check out Circulation log Claiming Apps Online

Lost items attached to unsuppressed bibs
0 records found **Actions**

Refresh complete with 4 records: [View updated list](#)

List information
Record last updated: Unknown

List name
Lost items attached to unsuppressed bibs

Description
-

Record type	Visibility	Status	Source
Items	Shared	Active	ADMINISTRATOR, DIKU

Query: (items.status_name in [Checked out]) AND (instances.discovery_suppress == False) AND (items.status_date >= 05/07/2019)

0 records found

The list contains no items

[< Previous](#) **1 - 0** [Next >](#)

Save List

- Click the link to “View updated List” to see your search results. The following screen will appear:

The screenshot displays a library management system interface. At the top, there is a navigation bar with various icons and labels: Lists, Agreements, Bulk edit, Check in, Check out, Circulation log, Claiming, Apps, and Online. Below this, a header for the current list reads "Lost items attached to unsuppressed bibs" with "4 records found" and an "Actions" button. The main content area is divided into sections: "List information" (showing the record was last updated on 5/8/2025 at 9:13 PM), "List name" (Lost items attached to unsuppressed bibs), and "Description" (empty). A table below shows the list's metadata: Record type (Items), Visibility (Shared), Status (Active), and Source (ADMINISTRATOR, DIKU). A query is displayed: "(items.status_name in [Checked out]) AND (instances.discovery_suppress == False) AND (items.status_date >= 05/07/2019)". Finally, a table lists the 4 records found, with columns for Items — Status, Items — Status date, Material type — Name, Instances — Instance HRID, Instances — Resource title, and Instances — Resource type.

Items — Status	Items — Status date	Material type — Name	Instances — Instance HRID	Instances — Resource title	Instances — Resource type
Checked out	5/8/2025	book	inst000000000003	The American Journal of Medicine	text
Checked out	5/8/2025	book	inst000000000022	A semantic web primer	text
Checked out	5/8/2025	book	inst000000000017	Interesting Times	text
Checked out	5/8/2025	book	inst000000000025	Transparent water	performed music

Optional: Export List

- Click the Actions menu to see export options
- You can export selected or all columns to .csv for further investigation

The screenshot shows a library system interface. At the top, there is a navigation bar with various icons and labels: Lists, Agreements, Bulk edit, Check in, Check out, Circulation log, Claiming, Apps, and Online. Below this, a specific list is titled "Lost items attached to unsuppressed bibs" with "4 records found".

On the left, there is a "List information" section with details like "Record last updated: 5/8/2025 9:13 PM", "List name: Lost items attached to unsuppressed bibs", and "Description: -". Below this is a table with columns: Record type (Items), Visibility (Shared), Status (Active), and Source (ADMINISTRATOR, DIKU).

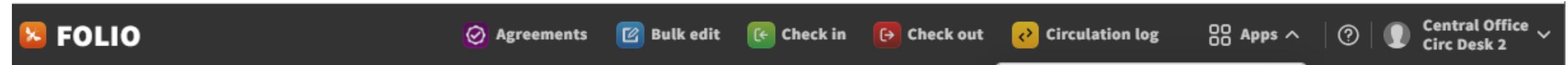
The main part of the interface shows a query: "Query: (items.status_name in [Checked out]) AND (instances.discovery_suppress == False) AND (items.s...". Below the query, it says "4 records found" and displays a table with the following data:

Items — Status	Items — Status date	Material type — Name	Instances — Instance HRID	Instances — Resour
Checked out	5/8/2025	book	inst0000000000003	The American Journa
Checked out	5/8/2025	book	inst0000000000022	A semantic web prim
Checked out	5/8/2025	book	inst0000000000017	Interesting Times
Checked out	5/8/2025	book	inst0000000000025	Transparent water

On the right side, an "Actions" menu is open, showing options: Refresh list, Edit list, Duplicate list, Delete list, Export selected columns (CSV), and Export all columns (CSV). Below these options is a search bar for column names and a "Show columns" section with a list of checkboxes for various item attributes like Accession number, Administrative notes, Barcode, Chronology, Copy number, Created date, Description of pieces, Display summary, Effective call number, Effective shelving order, Electronic access, Enumeration, and Former IDs.

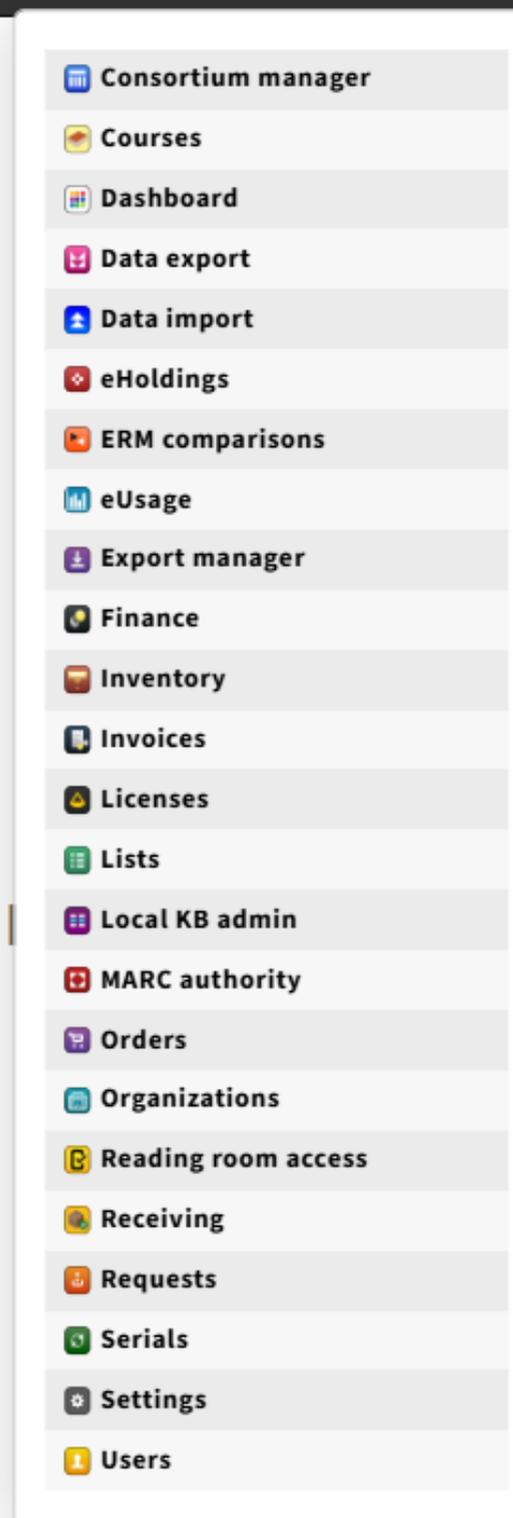
PANORAMA OVERVIEW

Panorama Integration with FOLIO Data



- Direct Data Connection for most up to date information from FOLIO
- Pulls Data from FOLIO Modules
- Out of the box and custom dashboards
- Reports on various aspects such as acquisitions, circulation, inventory

Welcome, the Future Of Libraries |



Library Data in Panorama

Library
Collections
Data

Usage of library resources (like articles and databases) from providers such as COUNTER, GOBI, EBSCONET, EDS, and EBSCOhost.
Understand which resources are popular and effective.

ILS Data

Information about library users (demographics), the library catalog (bibliographic), item availability (holdings), borrowing (circulation), and purchasing (acquisitions).
Comprehensive view of library users and their interactions with the collection.

Library
Services Data

How often library instruction, reference help, and facilities are used.
How patrons are engaging with the library's services and spaces.

User Behavior
& Outcomes
Data

Login activity, student information systems (SIS), research information systems (CRIS), and resource costs.
Evaluate how users engage with resources and the impact on things like student success and research.

Library
Specific Data

Unique information chosen by the library to view and analyze.

Panorama Licenses

Viewer	Explorer
Primarily focused on consuming and interacting with existing dashboards.	Encompasses all Viewer capabilities plus the ability to create new content.
Cannot create new dashboards.	Can create new dashboards from existing published data sources and dashboards.
Can view and interact with data presented in existing workbooks.	Has full access to existing workbooks for the purpose of creating new dashboards.
Typically intended for a broader audience needing to monitor and analyze data.	Geared towards users who require the ability to build and customize content.
Lower level of permissions, focused on data consumption.	Higher level of permissions, including content creation and design capabilities.
Contributes through comments and shared views.	Contributes through both consumption and the creation of new analytical resources for others to utilize.

Panorama Demo

Home Screen

Panorama

- Home
- Favorites
- Recents
- Shared with Me
- Recommendations

- Personal Space
- Collections
- Explore

Search for views, metrics, workbooks, and more

Help, Notifications, and Profile (GL)

New ▾

Home

Favorites

See All



E-Resource Usage

Info, Star, More

Collection Management

AVERAGE AGE OF COLLECTION

1983	41 years	1999	25 years	19,149	11.31%	1,100	11.6%
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OVERLAP ANALYSIS

LIBRARY OVERLAP

Collection Management

Info, Star, More

Title Overlap Analysis By Publisher

Publisher	Count	Overlap	Overlap %	Count
U.S. O.P.F.	4,213	0.00	0.00	798
Robert University Press	4,755	0.00	0.00	1001
Cambridge University Press	2,884	0.00	0.00	201
Taylor University Press	1,781	0.00	0.00	100
Prentice Hall	1,439	0.00	0.00	100
Harvard University Press	1,412	0.00	0.00	100
Blackwell Publishers	1,345	0.00	0.00	100
Blackwell Science	1,008	0.00	0.00	100

Overlap Analysis by Publi...

Info, Star, More



Circulation Details

Info, Star, More

Recents

See All



Circulation Details

2 days ago

Info, Star, More

List of FAQs

FAQ	Category	Created	Last Modified	Views
...

List of FAQs

last month

Info, Star, More



E-Resource Usage

last month

Info, Star, More



ACRL reporting

last month

Info, Star, More

Recommendations

See All

Search Box

The screenshot shows the Panorama dashboard interface. On the left is a navigation sidebar with the following items: Home, Favorites, Recents, Shared with Me, Recommendations, Personal Space, Collections, and Explore. The main content area is titled 'Home' and contains a 'Favorites' section with three dashboard cards: 'E-resource Usage', 'Collection Management', and 'Title Overlap Analysis By Publisher'. Below these is a 'Recents' section with four dashboard cards: 'Circulation Analysis', 'List of FAQs', 'E-resource Usage', and 'ACRL Reporting'. A search bar at the top right contains the text 'Search for views, metrics, workbooks, and more'. A dropdown menu is open from the search bar, showing 'Content types' (Views, Workbooks, Metrics, Collections, Data Sources) and 'Content suggestions' (E-Resource Usage, Collection Management, Circulation Details, ACRL reporting, IPEDS Reporting, ACRL Reporting). The search bar also includes a 'New' button and a 'See All' link.

Standard Dashboards

Panorama

Home
Favorites
Recents
Shared with Me
Recommendations

Personal Space
Collections
Explore

Explore / Standard Dashboards

Standard Dashboards ★ ⓘ ...
Owner: admin

New ▾ Select All

Content Type: All Sort By: Type

Type	Name	Actions	Value	Created
<input type="checkbox"/> <input type="checkbox"/>	ACRL Reporting	...	Airflow	May 9, 2025, 8:44 AM
<input type="checkbox"/> <input type="checkbox"/>	Chat Reference	...	Airflow	May 9, 2025, 8:44 AM
<input type="checkbox"/> <input type="checkbox"/>	Circulation Details	...	Airflow	May 9, 2025, 8:44 AM
<input type="checkbox"/> <input type="checkbox"/>	Circulation Overview	...	Airflow	May 9, 2025, 8:44 AM
<input type="checkbox"/> <input type="checkbox"/>	Collection Budget Overview (Alma)	...	Airflow	May 9, 2025, 8:44 AM
<input type="checkbox"/> <input type="checkbox"/>	Collection Expenditures	...	Airflow	May 9, 2025, 8:44 AM
<input type="checkbox"/> <input type="checkbox"/>	Collection Management	...	Airflow	May 9, 2025, 8:44 AM
<input type="checkbox"/> <input type="checkbox"/>	Discovery Search	...	Airflow	May 9, 2025, 8:44 AM
<input type="checkbox"/> <input checked="" type="checkbox"/>	E-Resource Usage	...	Airflow	May 9, 2025, 8:44 AM
<input type="checkbox"/> <input type="checkbox"/>	Interlibrary Loan (ILLiad)	...	Airflow	May 9, 2025, 8:44 AM
<input type="checkbox"/> <input type="checkbox"/>	IPEDS Historical	...	Airflow	May 9, 2025, 8:43 AM
<input type="checkbox"/> <input type="checkbox"/>	IPEDS Reporting ALMA	...	Airflow	May 9, 2025, 8:44 AM
<input type="checkbox"/> <input type="checkbox"/>	Library Events	...	Airflow	May 9, 2025, 8:44 AM
<input type="checkbox"/> <input type="checkbox"/>	Library Overview	...	Airflow	May 9, 2025, 8:44 AM
<input type="checkbox"/> <input type="checkbox"/>	Link Resolver	...	Airflow	May 9, 2025, 8:44 AM
<input type="checkbox"/> <input type="checkbox"/>	Reference Transactions	...	Airflow	May 9, 2025, 8:44 AM
<input type="checkbox"/> <input type="checkbox"/>	Research Guides and FAQs	...	Airflow	May 9, 2025, 8:43 AM

Grid View
List View

Standard Dashboards

Explore / Standard Dashboards

? 🔔 GL

Standard Dashboards ★ i ...

Owner **admin**

New ▾ Select All

Content Type: All ▾ Sort By: Type ▾ 🔍 🔼

Panorama

Home

Favorites

Recents

Shared with Me

Recommendations

Personal Space

Collections

Explore

ACRL Reporting i ☆ ...

Chat Reference i ☆ ...

Circulation Details i ☆ ...

Circulation Overview i ☆ ...

Collection Budget Overview i ☆ ...

Collection Expenditures i ☆ ...

Collection Management i ☆ ...

Discovery Search i ☆ ...

E-Resource Usage i ★ ...

Interlibrary Loan (ILLiad) i ☆ ...

IPEDS Historical i ☆ ...

IPEDS Reporting ALMA i ☆ ...

Library Events i ☆ ...

Library Overview i ☆ ...

Link Resolver i ☆ ...

Grid View 🔍

List View 📄

Use Case #1: Standard Dashboards – EResource Usage

Updated on 5/12/2025 8:44:26 AM (America/New_York)

TOTAL BOOK REQUESTS (EXCLUDING OA_GOLD)

Changes from previous year

7,270

Total Item Requests

5,217

Unique Title Requests

71.76%

Ratio of Unique Title Requests to Total Item Requests

-4,076

Difference from PY

-3,967

Difference from PY

BOOK REQUESTS (EXCLUDING OA_GOLD) YOY

Hover over the bar to see the details

■ Current Metric Value ■ Previous Metric Value

Usage YoY	# of investigations and requests	Delta
Total Item Requests	7,270	-36%
Unique Title Requests	5,217	-43%

BOOK REQUESTS (EXCLUDING OA_GOLD) TREND

Hover over the graph to see the details

Metric

(All)

■ Total Item Requests
■ Unique Title Requests



BOOK REQUESTS (EXCLUDING OA_GOLD) BY PLATFORM

Hover over the bar to see the details

PLATFORM (All) Metric (All)

Platform/publisher	Metric
EBSCOhost	Total Item Requests 7,270

TITLE DETAILS

Hover over the bubble to see a # of requests

Title Search Metric Total Item Requ...

Title	Total Item Requests
Starting Strong: Evidence-Based Early ..	538
Working Virtue: Virtue Ethics and Cont..	460
Teaching Mindful Writers	307
Multisensory Teaching of Basic Langu..	276
Film Studies, Second Edition: An Intro..	221
The Bloomsbury Research Handbook ..	198
The Global Water Crisis: A Reference ..	172
Naming What We Know: Threshold Co..	152
Fundamentals of Literacy Instruction & ..	91

Use Case #1: Standard Dashboards – EResource Usage

E-resource Usage

Client Name: Georgia Coll... Start Date: 7/1/2024 End Date: 4/30/2025 Report code: Journal Requ... Platform: (All) Publisher: (All) Info

Updated on 5/12/2025 8:44:26 AM (America/New_York)

TOTAL JOURNAL REQUESTS (EXCLUDING OA_GOLD)

Changes from previous year

61,002

Total Item Requests

49,685

Unique Item Requests

81.45%

Ratio of Unique Item Requests to Total Item Requests

-51,141

Difference from PY

-36,403

Difference from PY

JOURNAL REQUESTS (EXCLUDING OA_GOLD) YOY

Hover over the bar to see the details

Current Metric Value Previous Metric Value

Usage YoY	# of investigations and requests	Delta
Total Item Requests	61,002	-46%
Unique Item Requests	49,685	-42%

JOURNAL REQUESTS (EXCLUDING OA_GOLD) TREND

Hover over the graph to see the details

Metric

(All)

Total Item Requests
Unique Item Requests



JOURNAL REQUESTS (EXCLUDING OA_GOLD) BY PLATFORM

Hover over the bar to see the details

Metric

PLATFORM

(All)

Platform/publisher	Metric	Value
EBSCOhost	Total Item Requests	55,903
	Unique Item Requests	46,093
ProQuest	Total Item Requests	5,099
	Unique Item Requests	3,592
Lippincott	Total Item Requests	0
	Unique Item Requests	0
OCE	Total Item Requests	0
	Unique Item Requests	0
OvidSP	Total Item Requests	0

TITLE DETAILS

Hover over the bubble to see a # of requests

Title Search

Metric

Total Item Requ...

Title	Total Item Requests
PLoS One	696
Journal of American College Health	682
American Journal of Public Health	375
Innovative Higher Education	362
Congressional Digest	344
Harvard Business Review	341
Scientific Reports	324
Journal of Teacher Action Research	305
BMC nursing	277

Use Case #2: Circ Stats of Physical Items

Circulation Overview
Circulation by items

Circulation statistics of physical items

Start date: 5/12/2024
End date: 5/12/2025
Material type: (All)
Patron group: (All)
Info

Updated on 5/12/2025 8:44:26 AM (America/New_York)

Loans versus previous year

2,053

Total number of loans

-187

Difference from previous year

633

Total number of renewals

Monthly circulation

Legend: Selected year (orange), Previous year (grey), Renewal Count (light orange)

Number of loans per item location

Select an item location to filter

Selected year
Previous year

Total number of loans

- Circulating Collection
- DVD
- Juvenile Collection
- New Book Shelf - Second Floor
- Plays Collection
- YA Literature
- Center for Teaching & Learning
- N/A
- Compact Disc

Number of loans by subject area

Select a subject(s) area to filter

Subject area	Number of loans
Language and Literature	~180
Social Sciences (General)	~80
Philosophy (General)	~70
Science (General)	~40
History of America/United States	~30
Visual arts	~20
N/A	~10
History (General)	~10
Geography (General)	~5

Top 10 most borrowed items

[See full list →](#)

Borrowed items	Total number of borrowed items
The Government of Georgia	25
The encyclopedia of applied linguistics /	9
The Constitutional Convention of 1787 : co.	9
Greenwich Village, 1913 : suffrage, labor, a.	6
Animal farm /	6
Tracks : a novel /	4
The handmaid's tale /	4
The collected works of Samuel Taylor Coler.	4
Sexuality education : past, present, and fut.	4
Scythe /	4

Use Case #2: Circ Stats of Physical Items

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Borrowed items
Hover for details

Item Location: (All) | Material type: (All) | Subject area: (All)

Borrowed items	Barcode	Total number of borrowed items
The Government of Georgia	N/A	19
	30422002712453	6
The encyclopedia of applied linguistics /	30422005251269	1
	30422005251202	1
	30422005251145	1
	30422005251087	1
	30422005251020	1
	30422005250964	1
	30422005250907	1
	30422005250840	1
	30422005250618	1
	30422005250782	1
The Constitutional Convention of 1787 : constructing the American Republic /	30422004050050	1
	30422004039673	1
	30422004039616	1
	30422004029948	1
	30422004029880	1
	30422004029823	1
	30422004029765	1
	30422004029708	1
	30422004029641	1
	30422004040275	1
Greenwich Village, 1913 : suffrage, labor, and the new woman /	30422004040218	1
	30422004040150	1
	30422004040093	1
	30422004040036	1
	30422004039913	1
	30422002806958	2
Animal farm /	30422000099960	2
	30422004147005	1
	30422000747782	1
Tracks : a novel /	30422002874303	2
	30422003931227	1

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Geography (General)	~10

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Animal farm /	6
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The handmaid's tale /	4
The collected works of Samuel Taylor Coler.	4
Sexuality education : past, present, and fut.	4
Scythe /	4

SUMMARY

Summary

- Lists app
 - You must choose a name and record type before you can start building a query.
 - Test your query before saving, and add columns as needed to check your data.
 - Lists app allows the OR operator only *within* certain fields. To use OR *between* fields, export a separate list for each field and combine them in Excel.
- Panorama
 - Panorama is a data visualization tool which allows for the creation of dashboards of visualizations from a variety of data sources.
 - Viewer License vs Explorer License

Resources

- List of supported fields in Lists app: <https://docs.folio.org/docs/lists/#supported-fields-by-record-type>
- FOLIO MARC Mapping to Inventory Instances: <https://docs.google.com/spreadsheets/d/11IGBiPoetHuC3u-onVVLN4Mj5KtVHqJaQe4RqCygGzo/edit?gid=1871391984#gid=1871391984>
- FOLIO demo sites:
 - Snapshots are the place to see the newest development
 - <https://folio-snapshot.dev.folio.org/>
 - <https://folio-snapshot-2.dev.folio.org/>
 - <https://folio-etesting-snapshot-diku.ci.folio.org/> (this one is Eureka based)
 - Username and password are listed on the FOLIO wiki: <https://folio-org.atlassian.net/wiki/spaces/COMMUNITY/overview?mode=global>
- Ramsons (R2 2024) Corsair team – Lists app overview: <https://www.youtube.com/watch?v=uCnODrZ5jAM>
- Analytics Training for Lists App and Panorama <https://libguides.galileo.usg.edu/GIL-FOLIO/analytics#s-lg-box-wrapper-39693856>

Thank you!

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