

# FOLIO Reporting Options

FOLIO offers multiple reporting options designed to help libraries query and analyze their data efficiently. These reporting options include FOLIO Apps such as FOLIO Bulk Edit, Circulation Log, and Lists, in-app reports, Panorama, LDLite, and Metadb. These tools vary in complexity, integration, and support, and serve different technical capabilities and reporting needs. Not all reporting options are applicable or useful to every FOLIO library.

## FOLIO Apps for Reporting

The **FOLIO Lists app** allows users to use an intuitive interface to query the FOLIO database in real-time. Queries can be saved, duplicated, edited, deleted, and refreshed with results available for export via CSV. For FY26, the Lists app will support the ability to query across applications and query & display properly repeatable and nested fields. Additional entities, such as fees/fines and requests, and fields will continue to be rolled out in each release. The Boolean operators 'OR' and 'NOT' will be supported in the Umbrellaleaf release.

[FOLIO Docs: Lists App](#)

The **FOLIO Bulk Edit app** allows users to query and update groups of records in the FOLIO database. Records for updating can be found using the same Query Builder as the Lists app or by uploading a list of record IDs, such as the barcode or UUID. Because of slight differences in functionality with the Lists app, users can query and export different records from Bulk Edit and use it for reporting. For FY26, based on community feedback, the Bulk Edit app will expand to introduce functionality to manage profiles, improve the process to update MARC, support bulk deletes, and provide general improvements to the overall user experience.

[FOLIO Docs: Bulk Edit App](#)

## FOLIO Apps for Reporting Continued...

The FOLIO **Circulation Log app** allows users to search a log of all circulation actions including check outs, check ins, renewals, and requests. In addition, information on fees/fines and notices is available. The app can be searched using facets on the left side of the screen with search results available for export via CSV.

**FOLIO Docs: Circulation Log App**

FOLIO In-app reports is the term applied to reports pre-configured and available in applications within FOLIO. These reports are found in the Requests, Users, MARC authority, and Inventory apps. Examples include the 'Overdue loans' report in the Users app and 'In transit items report' in the Inventory app.

**FOLIO In-app Reports**

## Panorama

Panorama is a data analytics tool designed to assist libraries by providing visualization tools of data sets from various sources. FOLIO data is automatically harvested and displayed in a dozen dashboards covering circulation, finances, requests, course reserves, and orders. Libraries can create custom dashboards in addition to those provided using FOLIO data sets.

In FY26, we will be revamping our circulation data dashboards, upgrading our COUNTER dashboards to support 5.1, expanding our EBSCO Discovery Service dashboards, and exploring additional attribute reporting for OpenAthens.

We will also be working to understand and improve the customer experience with manual data sources. Lastly, we are focusing on increased documentation through a new Product Manual, expanded Dashboard Manuals, and a new announcement page.

**Panorama Product Manual**

## LDLite

**LDLite** is an open-source software package that uses API calls to harvest data then parsing that data into tables. LDLite requires staff or resources with SQL knowledge to implement and may not be useful or applicable for all libraries. A library with appropriate resources can use LDLite to build a snapshot copy of their FOLIO database (or a portion of it) for querying. If the data harvested is small, the database can be stored on an individual computer. In most cases, a library will need additional server support due to the size of the data set.

[LDLite GitHub Repository](#)

## Metadb

**Metadb** exists under the Open Library Foundation and is separate from the FOLIO project. To successfully query Metadb, libraries need staff or resources with SQL skills, basic database familiarity, and FOLIO data structure knowledge. Most libraries use database tools such as DBBeaver to run custom-built SQL queries. Results are often exported and loaded into analytical tools such as Excel or Tableau, for example, to allow for analysis of the results.

Metadb supports a single-tenant FOLIO environment only. To date, there have been no announcements of plans to support an ECS FOLIO environment. Metadb is available for subscription for customers who request it. EBSCO will host and maintain the Metadb environment. The subscription does not include access tools, training, or support.

FOLIO provides the **Reporting app** as the access point to a Metadb environment. The Reporting app only works with an LDP environment. The Reporting app allows users to run single table queries (Build Query), re-run saved queries (Load Query), and run pre-formatted queries from a connected public GitHub repository (Run report). Access to this app is controlled by FOLIO permissions.

Metadb does not integrate with FOLIO for data permissions. Any management of what data users are allowed to query and view is done by the library itself as of the 1.4 release (tentative release date in July). In contrast, the Lists & Bulk Edit apps respect all FOLIO data permissions. This is a concern for many libraries who need to protect PII or financial information from some users.

[Metadb GitHub Repository](#)

[Metadb Documentation](#)