Circulation Item Detail Report Prototype

*This needs to be updated to point to storage modules only

*circulation storage module not implemented so we need to use business logic module

*naming convention = mod x storage = storage module + mod x = business logic module, but not used consistently

API reference documentation for all modules located at: https://dev.folio.org/reference/api/

Example of this report coming from Voyager

*need loan type,loan type id, material type, material type id, and reserves

*need follow-up with Marc Johnson and/or Cate Boerema - loans

*Dale Arnston, Christie Thomas - inventory

*Cheryl Malmborg, Emma Boettcher - reserves

*generally speaking, it's good to include both a type data element and its associated ID data element

Report Description Detail

This report is modeled on ID410 (REP-103), an annual statistics report on Collections Use showing charges by collection type, patron group, and library. Collection type can be filtered to show regular, reserve, or material type for equipment (e.g., computers).

-what would the consumer of this report use it for?

-use case detail

-scope of report

-"owning library" has not been defined as a data element by the Resource Access SIG

-even though we cannot include effective location because it is in a business logic module, we need effective location added as a static field so the LDP can calculate effective location when it pulls the other location fields

Report Criteria

- Within a specified date range, provides listing of items charged by owning library, title, item barcode, holdings location, call number, item enumerator, copy number, and patron group.

Notes: Location-Related data elements

2 locations from item

- **1 (perm)**
- 2 (temp)

-2 locations from holdings

- 1 (perm)
- 2 (temp)

-effective location

- (mod-circulation: /circulation/loans)**location**

-service point

Folio Attribute (Module/Path: Object)	Folio Data Element Description	Parameters/Query
User ID (mod-circulation-storage/loan-storage/loans/anonymize/{userId}:**userID**)	The UUID of the user to whom an item is loaned	Provides a join point between mod-circulation-storage and mod-users - connects with: **mod-users/users/{userID}:patronGroup**
Patron Group ID (mod-users/users/{userID}:**patronGroup**)	The UUID corresponding to the group the user belongs to	Provides a join point between mod-users/users and mod-users/groups - connects with: **mod-users/users/groups:group**
Patron Group Name (mod-users/users/groups:**group**)	The unique name of this group	
Item Status (mod-inventory-storage/item-storage/items:**status**)	The item's status (e.g. Available, Checked out, In transit, etc.)	Where status.name="checked-out"
Item Call Number (mod-inventory-storage/item-storage/items:**itemLevelCallNumber**)	The call number listed within the item record of the loaned item	Both item call number and holdings call number will be listed within this report for the sake of comprehensiveness.
Holdings Call Number (mod-inventory-storage/holdings-storage:**callNumber**)	The call number listed within the holdings record of the loaned item	Both item call number and holdings call number will be listed within this report for the sake of comprehensiveness.
Item ID (mod-circulation-storage/loan-storage/loans:**itemId**)	The UUID of the loaned item	Provides a join point between mod-circulation-storage and mod-inventory-storage. This allows us to pull all pertinent details for the circulated item (as identified by its ID). Connects with: **mod-inventory-storage/item-storage/items/{itemId}:id**
Holdings ID (mod-inventory-storage/holdings-storage/holdings:**id**)	The UUID for the holdings record	Provides a join point between mod-inventory-storage/item-storage and mod-inventory-storage/holdings-storage. This allows us to pull the holdings-level call number. Connects with: **mod-inventory-storage/holdings-storage/holdings/{holdingId}:id**
Item Title (mod-inventory-storage/holdings-storage/holdings:**shelvingTitle**)	The title of the item loaned	
Item Barcode (mod-inventory-storage/item-storage/items/{itemId}:**barcode**)	The barcode of the item	Item ID provided from **mod-circulation-storage/loan-storage/loans:itemId**
Item Permanent Location ID (mod-inventory-storage/item-storage/items:**permanentLocationId**)	UUID for the item's permanent location. Note: I believe the **permanentLocationId** is a UUID that can be used to designate a "permanent location" as defined within one of the system's three levels of locations (i.e., institution, campus, and library locations). *Needed to calculate Effective Location	Provides a join point between mod-inventory-storage/item-storage/items and mod-inventory-storage/locations. Connects with: **mod-inventory-storage/locations**
Item Temporary Location ID (mod-inventory-storage/item-storage/items:**temporaryLocationId**)	UUID for the item's temporary location.	Provides a join point between mod-inventory-storage/item-storage/items and mod-inventory-storage/locations. Connects with: **mod-inventory-storage/locations**
Loan Date (mod-circulation-storage/loan-storage/loans:**loanDate**)	The date an item was loaned	This data element provides the main filter point for this report (where loanDate Between [start] And [end])

Item Enumeration (mod-inventory-storage /item-storage/items:**enumeration**)	Item enumerator (e.g., vol. 1, No. 2, etc.)	
Item Copy Number (mod-inventory-storage /item-storage/items:**copyNumbers**)	Item copy number (e.g., copy 1, copy 2, etc.)	
Item Location (mod-inventory-storage /locations:**name**)	Location where the item is held. The **name** element can refer to the descriptive name of the item's location at any of the three location-unit levels currently defined within the system (i.e., institution, campus, library).	The UUID provided by mod-inventory-storage/item-storage/items:**permanentLocationId** will determine what name is shown here.
Item Location (mod-inventory-storage /locations:**name**)	Location where the item is held. The **name** element can refer to the descriptive name of the item's location at any of the three location-unit levels currently defined within the system (i.e., institution, campus, library).	The UUID provided by mod-inventory-storage/item-storage/items:**temporaryLocationId** will determine what name is shown here.
Material Type Name (mod-inventory-storage /item-storage/material-types:**name**)	Label for the material type (e.g., "book")	This element is pulled into the report using the materialTypeId found in mod-inventory-storage/item-storage
Material Type ID (mod-inventory-storage/item-storage:**materialTypeId**)	UUID associated with any particular material type	Provides a join point between mod-inventory-storage/item-storage and mod-inventory-storage/material-type - connects with: **mod-inventory-storage/material-type**
Loan ID (mod-circulation-storage/loan-storage:**id**)	UUID generated by a loan (identifies a specific circulation transaction)	This element is not needed as a join point, since all loans within a specific date range are pulled by default. However, the addition of this element provides needed information within some contexts.
Location Unit Name (mod-inventory-storage /location-units /institutions:**name**)	Name of item location at the "institutions" level (i.e., lowest location level).	This element provides the ability to identify circulation levels for reserve items. Within the FOLIO API documentation, reserves are defined at the institution location level. However, this will not necessarily be the way reserves are established at all libraries. Generally speaking, reserves can be established within the context of locations or material types. Currently, this report pulls both elements. Therefore, filtering to derive reserves circulations levels is possible within the context of either scenario.