

External Statistics Report Prototype - IN PROGRESS

Notes:

-may need to break down report more

Description and Recommended Priority for Development

- 1. ACRL (Association of Research Libraries) report (ID226)**
 - annual report on circulation and expenditures for the Association of Research Libraries, comprised of university libraries in North America
 - will require some data from MARC fields
 - will cover most attributes for related reports such as ARL, NCES, and IPEDS
 - how easy is it to aggregate data?
- 2. Materials Expenditures on Digital Stocks that are not Serials (ID243 to ID247)**
 - expenses breakdown by all formats except serials, one time purchases
 - ID247 is an aggregator of special collections and may need to be separate as a report
- 3. Serials Inventory and Expenditures (ID248-ID255)**
 - expenses breakdown for serials
 - includes counts, costs, formats, etc.
 - must separate one-time and ongoing expenditures

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

Example of this report (need link)

*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 several external statistics reports, (description)

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

-use case detail

-scope of report

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)	<p>Location where the item is held.</p> <p>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).</p>	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	<p>Provides a join point between mod-inventory-storage/item-storage and mod-inventory-storage/material-type - connects with:</p> <p>mod-inventory-storage/material-type</p>
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).	<p>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.</p> <p>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.</p>