Loan and Renewal Count Report Prototype

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

Report Description Detail

This report is modeled on ID406 (UXPROD-942) and ID407 (REP-107), an annual statistics report that shows total loans and renewals by location. This report could be used to display total loans/renewals across several library branches within a single library organization, several library organizations across multiple campuses (e.g., for joint university systems), or several independent libraries that share a single FOLIO instance (e.g., with a shared, consortium catalog).

Data Fields

Loan date, due date, return date, loan renewal count, loan status, loan type, material type, item locations,.

Report Criteria

- Within a specified date range, provides a list of total loan and renewal counts across locations (at any of the three levels–institution, campus, and library)
- Note: currently this prototype only covers the most detailed level of location, and not campus or institution.

Filters

Date range, location

Folio Attribute (Module/Path:Object)	Folio Data Element Description	Parameters/Query
Table name: (mod-circulation-storage /loan-storage/loans		
Loan Date (mod-circulation-storage/loan-storage/loans:**loanDate**)	The date an item was loaned	Provides the main filter point for this report (where loanDate Between [start] And [end])
Loan ID (mod-circulation-storage/loan-storage/loans:**id**)	Unique ID (generated UUID) of the loan	All loan IDs are associated with a loan date. A count of these IDs within a specified date range (i.e., loan dates that fall within a date range specified by the user) will provide a total loan count for that period.
Renewal Count (mod-circulation-storage /loan-storage/loans:**renewalCount**)	Count of how many times a loan has been renewed (incremented by the client)	All renewal counts are linked to specific loan IDs. The sum of these data, for all loans falling within a specified period, provides a total number of renewals during that period.
Due Date (mod-circulation-storage/loan-storage/loans:**dueDate**)	If loan status is 'open', then date loan is due	Provides a filter if the report has to look at how many checked out items are due back between [start] and [end] due date.
Return Date (mod-circulation-storage/loan-storage/loans:**returnDate**)	If loan status is 'closed', then date item was returned	Provides a filter if the report has to look at how many checked out items were returned between [start] and [end] due date.
Status (mod-circulation-storage/loan-storage/loans:status)	Status of the loan (open or closed)	Current status of the loan: whether it is open or closed
Loan Policy ID (mod-circulation-storage /loan-storage/loans:**loanPolicyId**)	ID of the loan policy name, where loan name can be circulating, non-circulating, reserves, etc.	Provides a join between mod-circulation-storage/loan-storage/loans and mod-circulation-storage/loan-policy-storage/loan-policies
User ID (mod-circulation-storage/loan-storage/loans:**userId**)	Unique ID of the user (patron)	Provides a join between mod-circulation-storage/loan-storage/loans and mod-users/users
Item ID (mod-circulation-storage/loan-storage/loans:**itemId**)	Unique ID of the item lent to the patron	Provides a join point between mod-circulation-storage/loan-storage /loans and mod-inventory-storage/item-storage/items.
Table name: mod-inventory-storage /loan-type		
Loan type ID (mod-inventory-storage/loan-type:**id**)	id of the loan name (type of loan)	Provides a join between mod-inventory-storage/loan-type and mod-inventory-storage/item-storage/items
Loan Name (mod-inventory-storage/loan-type:**name**)	name of the loan (type of loan)	name of the loan (type of loan), such as 'can circulate', 'course reserves', etc.
Table name: mod-circulation-storage /loan-policy-storage/loan-policies		

loan policy ID (mod-circulation-storage /loan-policy-storage/loan-policies/**id**)	id of the loan policy associated with the item	Provides a join between mod-circulation-storage /loan-policies and mod-circulation-storage/loan-storage/loans
loan policy name (mod-circulation-storage /loan-policy-storage/loan-policies:**name**)	name of the loan policy associted with the item	Description of the loan policy associated with the loan, such as one-hour loan, 15 day loan, etc.
Table name: mod-inventory-storage /item-storage/items		
Item ID (mod-inventory-storage/item-storage/items:**id**)	Unique id of the item	Provides a join between mod-inventory-storage/item-storage/items and mod-circulation-storage/loan-storage/loans.
materialTypeID (mod-inventory-storage /item-storage/items:**materialTypeId**)	id of the item's material type	Provides a join between mod-inventory-storage/item-storage/items and mod-inventory-storage/material-types, to get the name of the material type.
permanentLoanTypeId (mod-inventory-storage/item-storage/items: **permanentLoanTypeId**)	id of the item's permanent loan type	Provides a join between mod-inventory-storage/item-storage/items and mod-inventory-storage/loan-type, to get permanent loan type
temporaryLoanTypeId (mod-inventory-storage/item-storage/items: **temporaryLoanTypeId**)	id of the item's temporary loan type	Provides a join between mod-inventory-storage/item-storage/items and mod-inventory-storage/loan-type, to get temporary loan type
Permanent Location ID (mod-inventory-storage/item-storage/items:**permanentLocationId**)	id of the item's permanent location	Provides a join between mod-inventory-storage/item-storage /items and mod-inventory-storage/locations, to get the name of the item's permanent location.
temporary Location ID (mod-inventory-storage/item-storage/items:**temporaryLocationId**)	id of the item's temporary location	Provides a join between mod-inventory-storage/item-storage /items and mod-inventory-storage/locations, to get the name of the item's temporary location.
effective Location ID (mod-inventory-storage/item-storage/items:**effectiveLocationId**)	id of the item's current location	Provides a join between mod-inventory-storage/item-storage /items and mod-inventory-storage/locations, to get the name of the item's current location.
Table name: mod-inventory-storage /material-types		
id (mod-inventory-storage/material-types:**id**)	id of the item's material type	Provides a join between mod-inventory-storage/material-types and mod-inventory-storage/item-storage/items, to get the name of the material type.
name (mod-inventory-storage/material-types\type:**name**)	The name of the material type	item material description, such as 'book', DVD', etc.
Table name: mod-users/users		
ID (mod-users/users:**id**)	unique ID of the patron (user)	Provides a join between mod-users/users and mod-circulation-storage /loan-storage/loans
patronGroup (mod-users/users:**patronGroup**)	unique ID for the group the user belongs to	Provides a join between mod-users/users and mod-users/groups
Table name: mod-users/groups		
ID (mod-users/groups:**id**)	patron group ID	Provides a join between mod-users/groups and mod-users/users, to get patron group name.
group(mod-users/groups:**group**)	patron group name	Patron group description, such as 'faculty', 'undergrad', etc.
Table name: mod-inventory-storage /locations		
Location ID (mod-inventory-storage /locations:**id**)	id of the item's location (can be permanent, temporary, or current location)	Provides a joint between mod-inventory-storage/locations and mod-inventory-storage/item-storage/items
Location name (mod-inventory-storage /locations:**name**)	item location name	name of item location, one of the main filters for this report.
Table name: mod-inventory-storage /locationunit/locations-units (NOT IN LDP, ALSO - how do these connect to item?)		
Institution ID (mod-inventory-storage /locationunit/locations-units/institutions:**id**)	Unique ID (generated UUID) for a institutional location	Provides the highest-level location unit id (institution id) associated with the item

Institution name (mod-inventory-storage /locationunit/locations-units/institutions:**name**)	name of institution	Provides the highest-level location unit name (institution name) associated with the item
Campus ID (mod-inventory-storage/location /location-units/campuses:**id**)	Unique ID (generated UUID) for a campus location	Provides the location (campus) id associated with items that are loaned.
Campus (mod-inventory-storage/location /location-units/campuses:**name**)	name of campus	Provides the campus name
Library ID (mod-inventory-storage/location /location-units/libraries:**id**)	Unique ID (generated UUID) for a library location	Provides the location (library) id associated with items that are loaned.
Library name (mod-inventory-storage /location/location-units/libraries:**name**)	Name of library	Provides the library name