

Add or Remove WRLC Retention

Processes a user-uploaded CSV of barcodes to bulk add or remove WRLC retention commitments across institutions, then emails a summary of results.

At a glance

- **Status:** Active
 - **Applies consortium-wide?:** Yes — processes barcodes across multiple Alma Institution Zones via subworkflows
 - **Runs on:** Alma Institution Zones (via Network routing in subworkflows)
 - **Trigger:** Manual form submission with CSV upload
 - **Primary outcome:** Bulk adds or removes WRLC retention flags on item records.
 - **Who receives results:** The email address provided in the form submission.
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Why this exists

WRLC retention commitments must be applied or removed at scale when retention decisions change. Performing this manually in Alma would require record-by-record updates across multiple institutions.

This workflow enables controlled bulk processing by:

- Accepting a structured CSV upload
- Confirming the number of records before execution
- Calling standardized subworkflows for each barcode
- Emailing a clear results summary

It centralizes retention management while preserving audit visibility.

What it does

- Presents a web form allowing staff to:
 - Choose **Add WRLC Retention** or **Remove WRLC Retention**
 - Upload a CSV file (maximum 4,000 barcodes)
 - Provide an email address for results
- Counts rows in the uploaded file.
- Displays a confirmation screen showing:
 - Number of barcodes detected

- Whether retention will be added or removed
 - After confirmation:
 - Processes each row individually.
 - Calls the appropriate subworkflow:
 - [Subworkflow - Add WRLC Retention](#)
 - [Subworkflow - Remove WRLC Retention](#)
 - Aggregates results (successes and errors).
 - Sends a formatted summary email.
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Where it runs

- **Alma IZ(s):**
 - Dynamically determined per row using the “Institution Code” column in the CSV.
 - **Systems touched:**
 - Alma APIs (via subworkflows)
 - Email (sent from `reports@wrlc.org`)
 - **Reports / queries used:** None
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How it works

Logic overview

1. Form Submission

The workflow begins with a form requiring:

- Dropdown selection:
 - Add WRLC Retention
 - Remove WRLC Retention
- CSV upload (must contain $\leq 4,000$ rows)
- Email address

Required CSV format:

Barcode	Institution Code
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⚠ The workflow does **not validate header names**; it assumes:

- First row is header.
- First column = Barcode.

- Second column = Institution Code.
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2. Row Counting & Review Step

Before processing:

- The uploaded file is decoded from base64.
- Blank lines are removed.
- Header row is subtracted from count.
- A confirmation screen displays:
 - Number of barcodes detected.
 - Whether retention will be added or removed.

This confirmation step prevents accidental bulk updates.

3. Branch Based on User Selection

An **If** node evaluates the dropdown choice:

- If **Add WRLC Retention** → calls:
 - Subworkflow – Add WRLC Retention
- Otherwise → calls:
 - Subworkflow – Remove WRLC Retention

Each CSV row triggers one subworkflow execution (mode: each).

⚠ Errors are set to `continueRegularOutput`, meaning:

- Processing continues even if some rows fail.
 - Failures are captured and summarized later.
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4. Subworkflow Processing

Each row:

- Routes to the correct Institution Zone.
- Retrieves the item by barcode.
- Adds or removes WRLC retention fields.
- Returns success or error information.

(Full logic documented in the respective subworkflow entries, [Add WRLC Retention](#) and [Remove WRLC Retention](#))

5. Aggregate Results

After all rows are processed:

The **Summarize results** node:

- Counts total processed rows.
- Counts successful updates.
- Collects error details.
- Attempts multiple barcode fallbacks:
 - `_inputBarcode`
 - `item_data.barcode`
 - `Barcode`

Errors are retained even if barcode is missing.

6. Email Results

Sends an HTML-formatted email containing:

- Total processed
- Successful updates
- Error count
- Detailed error list (if any)

From address: `reports@wrlc.org`

Recipient: Email provided in form

If results exist

- Each barcode is processed independently.
- Successful updates are counted.
- Errors are listed individually.
- User receives detailed summary email.

If no results

- If file contains zero data rows:
 - Processing completes immediately.
 - Email reflects zero processed.
 - If all rows fail:
 - Email lists all errors.
 - Workflow does not halt due to individual row failures.
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Artifacts produced

- Updated Alma item records (via subworkflows).
 - Summary email to submitting user.
 - No files, sets, or spreadsheets are created.
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