Create WRLC Long Lost Fines data table

At a glance

- **Status:** Active
- **Environment / Tags:** Live, Network Zone, Analytics, CLS Long Lost Items
- **Applies consortium-wide?: Yes.** The workflow uses WRLC Network Zone Analytics reports and a shared WRLC Institution Information table to build a centralized dataset for all participating institutions.
- **Runs on:** WRLC Alma Network Zone
- **Trigger:** Automatically runs at the end of each semester:
  - **April 30** – Creates the **Spring** semester data table
  - **August 30** – Creates the **Summer** semester data table
  - **November 30** – Creates the **Fall** semester data table
- **Primary outcome:** Creates and populates a semester-specific data table containing all current Long Lost CLS items that will be used by the remaining Long Lost CLS workflows.
- **Who receives results:** WRLC HQ staff receive a confirmation email indicating that the data table has been successfully created and populated.

Why this exists

The Long Lost CLS workflow consists of several independent workflows that all operate on the same set of patron and loan data. Rather than querying Alma Analytics repeatedly, this workflow creates a centralized data table at the end of each semester containing every active Long Lost CLS item.

By establishing a single working dataset, subsequent workflows can update, enrich, and track records throughout the semester while ensuring they are all referencing the same information.

What it does

- Runs automatically at the end of each semester.
- Creates a new LibOW data table named for the current semester (for example, **Long Lost CLS Items Report Fall 2026**).
- Retrieves the current Long Lost CLS dataset from the WRLC Alma Analytics report.

- Reformats the loan and due dates into a user-friendly format while preserving the original date values.
- Looks up each patron's home institution and adds the corresponding institution code.
- Retrieves the patron's home account information through the subworkflow 'Retrieve Patron Home Account Through Linked Account'.
- Maps Analytics fields into the standardized data table structure used by the remainder of the Long Lost CLS workflows.
- Inserts one row into the data table for every qualifying Long Lost CLS loan.
- Sends a confirmation email to WRLC HQ staff summarizing the successful creation of the data table.

Where it runs

Alma environment

- WRLC Alma Network Zone

Systems touched

- Alma Analytics
- LibOW Data Tables
- LibOW subworkflow Retrieve Patron Home Account Through Linked Account
- Gmail

Reports and data sources

- Alma Analytics report:
  - **WRLC Long Lost CLS Items**
  - `/shared/Washington Research Library Consortium (WRLC) Network/Reports/Requests and Fulfillment`
- WRLC Institution Information data table
- **Retrieve Patron Home Account from Linked Account** subworkflow

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How it works

Logic overview

1. A scheduled trigger starts the workflow at the beginning of a semester.
2. The workflow identifies which semester is ending and names the new data table accordingly.
3. A new data table is created with all columns required for downstream Long Lost CLS processing.
4. The workflow retrieves the current Long Lost CLS records from Alma Analytics.

5. Loan and due dates are reformatted for reporting purposes.
6. Each patron's home institution code is added by referencing the WRLC Institution Information table.
7. A subworkflow retrieves the patron's home account information (Retrieve Patron Home Account Through Linked Account)
8. All data is standardized into the LibOW data table schema.
9. Every record is inserted into the newly created data table.
10. WRLC HQ staff receive a confirmation email with the table name, number of imported rows, and creation timestamp.

If results exist

Each Long Lost CLS record becomes a row in the semester's data table, creating the working dataset used by downstream Long Lost CLS workflows.

If no results exist

A new data table is still created, but no rows are inserted. A confirmation email is still sent indicating that the workflow completed successfully.

Artifacts produced

- A LibOW data table named using the pattern: `Long Lost CLS Items Report <Semester> <Year>`
- Confirmation email sent to WRLC HQ staff containing:
  - Data table name
  - Number of rows imported
  - Date and time of creation

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