

Reassign Retention for Lost and Paid CLS Items

After each Long Lost CLS processing cycle, this workflow reviews Lost and Paid items that were previously designated as WRLC Retention copies. When possible, it transfers the Retention designation to another eligible consortium copy and records the outcome in the Long Lost CLS data table.

At a glance

- **Status:** Active
- **Environment / Tags:** Network Zone; CLS Long Lost Items
- **Applies consortium-wide?:** Yes
- **Runs on:** WRLC HQ's LibOW Network Zone environment, with actions performed against applicable member-library Alma Institution Zones
- **Trigger:** Scheduled three times each year:
 - February 4 at 7:00 a.m. for the previous fall semester
 - June 4 at 7:00 a.m. for the spring semester
 - October 4 at 7:00 a.m. for the summer semester
- **Primary outcome:** Reviews CLS items marked Lost and Paid, attempts to transfer WRLC Retention responsibility to another eligible consortium copy, records the outcome, and sends WRLC staff a spreadsheet for review.
- **Who receives results:** A WRLC administrator receives an email and spreadsheet through the generic LibOW Gmail account.

Why this exists

Some CLS items that become Lost and Paid are also designated as WRLC Retention copies. Because a lost item can no longer reliably serve as the consortium's retained copy, its retention responsibility may need to be transferred to another eligible copy.

This workflow identifies affected items, gathers their current consortium and retention information, attempts to reassign WRLC Retention where appropriate, and records the result in the Long Lost CLS data table. It also produces a consolidated report so WRLC staff can review cases that require manual action, including WRLC Permanent items and titles for which no replacement retention copy is available.

What it does

- Runs after each semester's Long Lost CLS processing cycle and identifies the semester associated with the scheduled run.
- Retrieves active loan records from the applicable Long Lost CLS data table.

- Processes each item individually using its barcode.
- Calls the [Look up consortial item by barcode](#) subworkflow to retrieve current information about the item and its associated bibliographic record across the consortium.
- Updates the item's record in the data table with current information, including:
 - Final item status
 - Retention status and reason
 - Network identifier and network record type
 - MMS ID
 - Item description
- Sorts each item into one of three categories:
 - **WRLC Retention**
 - **WRLC Permanent**
 - **Not marked for Retention**
- For WRLC Retention items, calls the **Reassign WRLC Retention** subworkflow to determine whether retention can be transferred to another eligible consortium copy.
- For WRLC Permanent items, records that the item requires separate review rather than attempting automatic reassignment.
- For items without a retention designation, records that no retention action is required.
- Saves the reassignment result in the Long Lost CLS data table.
- Retrieves the updated active-loan records and prepares a consolidated spreadsheet.
- Emails the spreadsheet to a WRLC administrator with explanations of the possible reassignment statuses and instructions for completing any remaining manual work.

Where it runs

- **LibOW environment:** WRLC HQ Network Zone
- **Alma IZs:** Multiple member-library Institution Zones may be consulted or updated, depending on the owning institution and the location of eligible consortium copies.
- **Systems touched:**
 - LibOW data tables
 - Alma item and bibliographic information through subworkflows
 - Member-library Alma Institution Zones through the retention-reassignment subworkflow
 - Gmail for delivery of the final report
- **Subworkflows used:**
 - [Look up consortial item by barcode](#)
 - **Reassign WRLC Retention**
- **Credential label referenced:**
 - Gmail Credentials - Generic LibOW
- **Reports / queries used:** No Alma Analytics report is called directly. The workflow reads from and updates a Long Lost CLS Items Report data table maintained in LibOW.

How it works

Logic overview

- **If active Long Lost CLS records exist:**

Each item is looked up, its current consortium and retention information is recorded, and it is routed according to its retention designation.

- **If the item is marked WRLC Retention:**

The workflow calls the retention-reassignment subworkflow. That subworkflow attempts to locate another eligible consortium copy and returns the reassignment result.

- **If the item is marked WRLC Permanent:**

The workflow does not automatically transfer the designation. It records **WRLC Permanent status** so the item can be reviewed and handled individually.

- **If the item is not marked for retention:**

The workflow records **Not marked for Retention** and takes no further retention action.

- **If retention cannot be reassigned automatically:**

The returned status is recorded in the data table and included in the spreadsheet for WRLC staff review.

- **If no active records exist:**

No items continue through the processing path. The workflow does not contain a separate no-results notification, so no spreadsheet or email is produced.

Artifacts produced

- **File type:** Excel workbook

- **File naming pattern:** lost-and-paid-items-YYYY-MM-DD.xlsx

- **Email subject:** WRLC Long Lost CLS – All Lost and Paid items

- **Recipient:** WRLC administrator

- **Follow-up:** The email directs WRLC staff to review items requiring manual retention or permanent-status work, update the LibOW data table where necessary, and then run the separate workflow that distributes Lost and Paid item lists to cataloging departments.

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