

SCF - Update Internal Note 1

A form is used to input and update the Internal Note 1 field in both the Shared Collections Facility (SCF) IZ and the IZ that owns the item.

At a glance

- **Status:** Active
- **Applies consortium-wide?:** No
- **Runs on:** SCF Production Alma environment, with conditional updates to owning Institution Zones (*Inferred from credential labels and network logic; you may want to check the workflow export.*)
- **Trigger:** Manual form submission — staff enter a barcode and tray location via a web form
- **Primary outcome:** Updates **Internal Note 1** on an item record with a tray location, in SCF and (when applicable) the owning institution's Alma IZ.
- **Who receives results:** The submitting staff member (on-screen success or error message)

Why this exists

Shared Collections Facility (SCF) staff need a fast, reliable way to record **tray location information** on physical items in both the SCF Institution Zone and the IZ of the Owning Institution. This workflow provides a simple form-based tool that updates the Alma item's *Internal Note 1* and *Item Call Number* field without requiring staff to navigate full Alma item editing screens, while also keeping owning institutions' records in sync when appropriate. However, this needs to be two separate workflows for quality control.

What it does

- Presents a simple form asking staff to enter an **item barcode**.
- Looks up the item in Alma using that barcode.
- Determines whether the item belongs only to SCF or also has an owning Institution Zone (IZ).
- Prompts the user to enter a **Tray Location**.
- Writes the tray location into the item's **Internal Note 1** field.
- Updates:
 - SCF's item record, and
 - the owning IZ's item record *when the item belongs to a WRLC member institution*.
- Displays a clear success or error message explaining what was updated.

Where it runs

- **Alma IZ(s):**

- Shared Collections Facility (SCF) Institution Zone
- Owning WRLC member Institution Zones (conditional)
- **Systems touched:**
 - **Alma APIs** — used to retrieve and update item records
 - **Alma Network Zone logic** — used to identify and route updates to the owning IZ
- **Reports / queries used:** None (no Alma Analytics usage)

How it works

Logic overview

Execution flow (plain language):

1. **Form submission**
 - Staff submit a barcode via a web form titled *“Update Internal Note 1.”*
2. **Retrieve item using barcode**
 - Alma API retrieves the item record from SCF.
 - If the barcode is invalid or not found, the workflow stops and shows an error.
3. **Owning IZ check**
 - The workflow checks the item’s *provenance* value.
 - If the provenance matches a known WRLC member IZ code, the item is treated as having an owning IZ.
 - Otherwise, it is treated as an SCF-only item.
4. **Tray location entry**
 - Staff are prompted to enter a **Tray Location**, with the item title shown for confirmation.
5. **Update logic**
 - The tray location is written to `item_data.internal_note_1`.
 - For SCF-only items:
 - The item is updated in SCF only.
 - For items with an owning IZ:
 - The item is updated in SCF.
 - The workflow retrieves the owning IZ’s item record and updates it as well.
6. **Completion**
 - A success message confirms where the update occurred.
 - If the SCF update succeeds but the owning IZ update fails, a partial-success error message is shown.

If results exist

- The item is found and updated.
- **Internal Note 1** is overwritten with the entered tray location.
- A success message clearly states whether the update occurred:
 - in SCF only, or
 - in both SCF and the owning Institution Zone.

If no results

- If the barcode lookup fails:
 - The workflow stops immediately.
 - The user sees a descriptive error message returned from Alma.
- No updates are made.

Artifacts produced

- **Updated Alma item records**
 - Field affected: `Internal Note 1`
 - No reports, files, or emails are generated.
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