

Subworkflow - Reassign WRLC Retention

At a glance

- **Status:** Active
- **Environment / Tags:** Live; Network Zone
- **Applies consortium-wide?:** Yes
- **Runs on:** WRLC Network Zone, with actions applied to items in member Institution Zones and the WRLC Shared Collections Facility (SCF), as applicable
- **Trigger:** Runs when called by another workflow
- **Primary outcome:** Reassigns the WRLC Retention designation from an eligible item to another available monograph copy in the consortium.
- **Who receives results:** The calling workflow receives a status explaining whether retention was reassigned or why the item was ineligible. No email or report distribution is configured.

Why this exists

When an item holding the WRLC Retention designation can no longer serve as the retained copy, another eligible copy must be identified so the consortium's retention commitment can be maintained. This subworkflow evaluates the item and other consortium copies, excludes unsuitable locations, and coordinates the removal and addition of retention designations.

What it does

- Receives an item from another workflow. Expected input includes the item's barcode, Network Zone linkage type, Network Zone identifier, item identifier, description, owning institution code, and location information.
- Identifies SCF barcodes by their ending . When one is received, it removes the final before continuing its search.
- Confirms that the item is linked to the Network Zone and is a monograph. Items that do not meet either requirement are returned with an explanatory status.
- Uses the Alma Analytics report **Retention Reassignment Form** to find other copies associated with the same Network Zone record, excluding the original barcode.
- Compares the permanent and temporary locations of potential replacement copies against the **Exclusion List for WRLC Retention Designation** data table.

- Checks whether at least one eligible, available monograph copy remains. If none remains, the workflow reports that the original item is the last available retention monograph in the consortium.
- Determines whether one of the eligible copies already has the WRLC Retention designation.
- Selects the appropriate replacement copy, accounting for cases where the selected copy has a corresponding SCF copy.
- Calls the [Add WRLC Retention](#) subworkflow for the replacement copy and, when applicable, its SCF copy.
- Calls the [Remove WRLC Retention](#) subworkflow for the original item and, when applicable, its SCF copy.
- Returns the original barcode and item identifier with either a successful reassignment message naming the replacement barcode or a status explaining why reassignment could not occur.

Where it runs

- **Alma IZ(s):** Multiple WRLC member Institution Zones and the WRLC SCF Institution Zone, depending on the ownership and location of the affected copies
- **Alma tenant:** WRLC Network Zone
- **Systems touched:**
 - **Alma Analytics:** Alma's reporting service, used here to locate other consortium copies associated with the same Network Zone record.
 - **n8n data table:** Used to exclude institution and location combinations that are not eligible for a retention designation.
 - **Alma APIs:** Accessed through the retention addition and removal subworkflows.
 - **Other LibOW workflows:** Calls the **Add WRLC Retention** and **Remove WRLC Retention** subworkflows.
- **Credential referenced:** NZ Production – Alma APIs – Read Only
- **Reports / queries used:**
 - Path: `/shared/Washington Research Library Consortium (WRLC) Network/Reports/Retention Reassignment`
 - Report: `Retention Reassignment Form`
 - Filters by the item's Network Zone identifier and excludes the original barcode.
- **Data table used:** `Exclusion List for WRLC Retention Designation`

How it works

Logic overview

- **If the item is not linked to the Network Zone:** No reassignment occurs. The workflow returns a status stating that the item does not meet the criteria because it is not linked to the Network Zone.

- **If the item is not a monograph:** No reassignment occurs. The workflow returns a status stating that the item does not meet the criteria because it is not a monograph.
- **If eligible results exist:** The workflow filters out excluded locations, identifies an appropriate replacement copy, adds retention to that copy, removes retention from the original item, and returns the replacement barcode.
- **If the replacement or original item has an SCF copy:** The workflow also prepares the corresponding barcode ending in `x` and applies the appropriate retention addition or removal to the SCF copy.
- **If another copy already has retention:** That retained copy is used when coordinating the reassignment and removal actions.
- **If no eligible results exist:** No retention changes are made. The workflow reports that the item is the last available retention monograph in the consortium.

Artifacts produced: No files or email attachments are created. The output is structured workflow data containing the original barcode, item identifier, and a `reassign_retention_status` message describing the result.

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