

Update Item Description with Excel

At a glance

- **Status:** Active
- **Environment / Tags:** Network Zone
- **Applies consortium-wide?:** No — the workflow processes one selected Institution Zone per run
- **Runs on:** One Alma Institution Zone chosen by the user at submission time
- **Trigger:** Manual form submission with CSV upload
- **Primary outcome:** Bulk updates item description, enumeration, and chronology fields on Alma item records from a CSV file.
- **Who receives results:** The email address provided in the form submission

Why this exists

Staff sometimes need to update item description fields in bulk, especially for serials, multipart items, or other records where description, enumeration, and chronology need to be corrected or added consistently. Doing this one item at a time in Alma is slow and error-prone. This workflow provides staff at HQ an upload form that applies those updates via the Network Zone in bulk for a selected Institution Zone, and then emails a summary of the results.

What it does

- Presents a form where staff choose an **Institution Zone**, upload a **CSV file**, and enter an **email address**.
- Accepts CSV files with up to **4,000 barcodes**.
- Counts the number of data rows in the uploaded file.
- Shows a confirmation screen before processing begins.
- Routes processing to the selected Institution Zone.
- Retrieves each item by barcode.
- Merges the Alma item record with the spreadsheet row.
- Updates item fields from the CSV:
 - Description
 - Enumeration A-H
 - Chronology I-M
- Blanks those Alma fields if a corresponding spreadsheet column is missing or empty.
- Writes the updated item back to Alma.
- Summarizes successes and errors.
- Emails the submitting user a results summary.

Where it runs

- **Alma IZ(s):** Select one of the 16 IZs in our Network Zone
- **Systems touched:**
 - Alma APIs
 - Alma Network routing
 - Email via Alma letter API
- **Reports / queries used:** None

How it works

Logic overview

1. Form submission

The workflow begins with a form titled **Update Item Record with Excel**.

Required inputs:

- **Institution Zone** dropdown
- **Upload file of barcodes** (.csv)
- **Email**

The form description specifies that the CSV should contain:

- first column header: Barcode
- remaining headers: Description, Enum A - H, Chron I - M

2. Pre-processing and confirmation

The workflow reads the uploaded CSV and counts non-blank lines, subtracting the header row to calculate the number of barcodes. It then shows a review screen telling the user how many barcodes were detected and that the selected item records will be updated in Alma.

This is a confirmation step only. It does not validate the CSV headers beyond assuming the first row is a header row.

3. Extract CSV rows

A separate branch extracts the CSV contents into rows for processing. This branch is merged back after the user confirms submission.

4. Route to the selected Institution Zone

After confirmation, the workflow uses the selected **Institution Zone** value to route API calls through the Alma Network node to the correct institution.

5. Retrieve each item by barcode

For each CSV row, the workflow retrieves the Alma item record using the barcode in that row.

6. Build the update payload

The workflow combines the spreadsheet row with the retrieved Alma item record, then updates these Alma item fields from the spreadsheet columns:

- `description` from **Description**
- `enumeration_a` through `enumeration_h` from **Enum A** through **Enum H**
- `chronology_i` through `chronology_m` from **Chron I** through **Chron M**

Important behavior:

- Spreadsheet-only columns are removed from the payload before the item is sent back to Alma.
- If a column is present but blank, the Alma field is set to blank.
- If a column is missing entirely, the Alma field is also set to blank.

This means the workflow is not just adding values; it can also clear existing Description / Enum / Chron values.

7. Update Alma item records

The workflow sends the modified item record back to Alma using the item update endpoint.

8. Summarize results and email the user

After all item updates complete, the workflow counts:

- total processed
- successful updates
- errors

It then emails the submitting user a summary report.

If results exist

- Matching item records are updated in the selected Institution Zone.
- Description / enumeration / chronology values are overwritten from the CSV.
- The user receives an email summarizing how many records were processed successfully and how many errors occurred.

If no results

- If a barcode cannot be retrieved or an update fails, processing continues for the remaining rows.
- Errors are captured and included in the results summary.
- The workflow does not stop on individual row failures.

Artifacts produced

- Updated Alma item records
 - Email summary sent to the submitting user
 - No spreadsheets, sets, or reports are created by the workflow itself
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