

WRLC - Retention Copy Analysis Tool

At a glance

- **Status:** Active
 - **Environment / Tags:** Analytics
 - **Applies consortium-wide?:** Yes (Inferred)
 - **Runs on:** Alma Network Zone (NZ) (Inferred)
 - **Trigger:** Manual web form—runs when a user submits a barcode
 - **Primary outcome:** Displays all copies of a title (same Network ID) along with retention and processing details
 - **Who receives results:** The user who submitted the form (interactive display in browser)
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Why this exists

When evaluating retention commitments across the consortium, staff need to understand how many copies of a title exist and which institution is responsible for retaining them.

This workflow provides a quick way to analyze all copies tied to the same **Network ID** (i.e., the same bibliographic record or edition). It helps staff:

- Identify which institution has committed to retain a title
 - Review retention decisions before making changes
 - Understand duplication across partner libraries
 - Support retention reassignment workflows
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What it does

- Presents a web form asking the user to enter a **barcode**
- Uses the barcode to look up the associated item in Alma Analytics
- Extracts the **Network ID** (shared bibliographic identifier) for that item
- Uses the Network ID to retrieve **all matching copies** across the consortium
- Pulls detailed data for each copy, including:
 - Title
 - Barcode

- Process type (e.g., item status)
 - Retention commitment status
 - Retention reason
 - Call number
 - Fulfillment note
 - Institution name
 - Formats results into a table for easy review
 - Displays the results directly in the browser
 - Shows an error message if no valid Network ID is found
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Where it runs

- **Alma IZ(s):**
 - Network Zone (NZ)
 - **Systems touched:**
 - Alma Analytics (reporting system used to query library data)
 - n8n web form interface
 - **Reports / queries used:**
 - `/shared/Washington Research Library Consortium (WRLC) Network/Reports/CannedReports`
 - *Retention Reassignment Form - Barcode Lookup*
 - *Retention Reassignment Form*
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How it works

Logic overview

1. User submits a barcode via the form
 2. Workflow runs **Barcode Lookup** report to retrieve item data
 3. Extracts the **Network ID** from the result
 4. Runs a second Analytics query using that Network ID to find all related copies
 5. Branches based on whether the Network ID lookup succeeds
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If results exist

- All matching copies (same Network ID) are displayed in a table
- Each row includes:
 - Title
 - Barcode

- Process type
 - Retention commitment (Yes/No)
 - Retention reason
 - Call number
 - Fulfillment note
 - Owning institution
 - A total result count is shown at the top
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If no results

- If the Network ID cannot be found or is invalid:
 - User sees an error message:

“Your item does not appear to have a valid network ID. You may need to do a more detailed search in Alma.”

- If no matching copies are returned:
 - The table displays:
“No results found.”
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Artifacts produced

- **No files generated**
 - Output is a **dynamic HTML results page** displayed immediately to the user
 - Includes a restart option to run another search
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