

# WRLC Retention

Processes a user-uploaded CSV of barcodes to bulk add or remove WRLC retention commitments across institutions, then emails a summary of results.

## At a glance

- **Status:** Active
  - **Applies consortium-wide?:** Yes — processes barcodes across multiple Alma Institution Zones via subworkflows
  - **Runs on:** Alma Institution Zones (via Network routing in subworkflows)
  - **Trigger:** Manual form submission with CSV upload
  - **Primary outcome:** Bulk adds or removes WRLC retention flags on item records.
  - **Who receives results:** The email address provided in the form submission.
- 

## Why this exists

WRLC retention commitments must be applied or removed at scale when retention decisions change. Performing this manually in Alma would require record-by-record updates across multiple institutions.

This workflow enables controlled bulk processing by:

- Accepting a structured CSV upload
- Confirming the number of records before execution
- Calling standardized subworkflows for each barcode
- Emailing a clear results summary

It centralizes retention management while preserving audit visibility.

---

## What it does

- Presents a web form allowing staff to:
  - Choose **Add WRLC Retention** or **Remove WRLC Retention**
  - Upload a CSV file (maximum 4,000 barcodes)
  - Provide an email address for results
- Counts rows in the uploaded file.
- Displays a confirmation screen showing:
  - Number of barcodes detected
  - Whether retention will be added or removed
- After confirmation:
  - Processes each row individually.

- Calls the appropriate subworkflow:
    - [Subworkflow - Add WRLC Retention](#)
    - [Subworkflow - Remove WRLC Retention](#)
  - Aggregates results (successes and errors).
  - Sends a formatted summary email.
- 

## Where it runs

- **Alma IZ(s):**
    - Dynamically determined per row using the “Institution Code” column in the CSV.
  - **Systems touched:**
    - Alma APIs (via subworkflows)
    - Email (sent from `reports@wrlc.org`)
  - **Reports / queries used:** None
- 

## How it works

### Logic overview

#### 1. Form Submission

The workflow begins with a form requiring:

- Dropdown selection:
  - Add WRLC Retention
  - Remove WRLC Retention
- CSV upload (must contain  $\leq 4,000$  rows)
- Email address

Required CSV format:

Barcode	Institution Code
---------	------------------

⚠ The workflow does **not validate header names**; it assumes:

- First row is header.
  - First column = Barcode.
  - Second column = Institution Code.
- 

#### 2. Row Counting & Review Step

Before processing:

- The uploaded file is decoded from base64.
- Blank lines are removed.
- Header row is subtracted from count.
- A confirmation screen displays:
  - Number of barcodes detected.
  - Whether retention will be added or removed.

This confirmation step prevents accidental bulk updates.

---

### 3. Branch Based on User Selection

An **If** node evaluates the dropdown choice:

- If **Add WRLC Retention** → calls:
  - `Subworkflow – Add WRLC Retention`
- Otherwise → calls:
  - `Subworkflow – Remove WRLC Retention`

Each CSV row triggers one subworkflow execution (`mode: each`).

△ Errors are set to `continueRegularOutput`, meaning:

- Processing continues even if some rows fail.
  - Failures are captured and summarized later.
- 

### 4. Subworkflow Processing

Each row:

- Routes to the correct Institution Zone.
- Retrieves the item by barcode.
- Adds or removes WRLC retention fields.
- Returns success or error information.

(Full logic documented in the respective subworkflow entries, [Add WRLC Retention](#) and [Remove WRLC Retention](#))

---

### 5. Aggregate Results

After all rows are processed:

The **Summarize results** node:

- Counts total processed rows.
- Counts successful updates.
- Collects error details.
- Attempts multiple barcode fallbacks:
  - `_inputBarcode`
  - `item_data.barcode`
  - `Barcode`

Errors are retained even if barcode is missing.

---

## 6. Email Results

Sends an HTML-formatted email containing:

- Total processed
- Successful updates
- Error count
- Detailed error list (if any)

From address: `reports@wrlc.org`

Recipient: Email provided in form

---

### If results exist

- Each barcode is processed independently.
- Successful updates are counted.
- Errors are listed individually.
- User receives detailed summary email.

### If no results

- If file contains zero data rows:
    - Processing completes immediately.
    - Email reflects zero processed.
  - If all rows fail:
    - Email lists all errors.
  - Workflow does not halt due to individual row failures.
- 

## Artifacts produced

- Updated Alma item records (via subworkflows).
  - Summary email to submitting user.
  - No files, sets, or spreadsheets are created.
-

