

Bulk Loading: General Instructions (LTS Procedure #46a)

DEPRECATED See [Data Import: General Instructions](#)

Scope: This procedure provides instructions for running automated import, export, cleanup, reporting and various related jobs using scripts found in LS Tools web site and other tools created by the Library Systems Office and LTS Batch Processing staff. For issues surrounding the scheduling of large batch loads, please consult [Bulk Loading: Scheduling \(#46d\)](#). Unless otherwise noted, the items listed below are descriptions of scripts and tools found on LS Tools. Jobs may include scripts known as "mod jobs" run from a staff member's individual LS Tools folder, as opposed to scripts that are accessible directly from the LS Tools web interface. Non-LS Tools jobs are most commonly referred to as "manual" jobs. For information on staff batch job assignments, please refer to the [Bulk Loading: List of Jobs \(#46c\)](#).

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Note: Access to LS Tools is limited to trained technical services staff, divided into several levels, depending upon the degree of complexity and the impact of the tools accessible at each level.

- **Staff with Basic-Level Access** can execute pre-written scripts created by the Library Systems Office to load vendor supplied MARC records and create basic modification jobs. Staff member must have a basic understanding of and familiarity with Windows-related software. Loads often require manual examination of discards, requiring the understanding of procedures and workflows associated with the materials being loaded.
- **Staff with Advanced-Level Access** can use tools present in LS Tools to modify vendor records and bulk import the result into the Voyager database. They can extract existing Voyager records, correct existing errors, and then reload them into the Voyager database. They can also run various Library Systems scripted reports and extracts, as well as all the tools present for the basic level. Users at this level must have the ability to manipulate MARC data, i.e. the deletion and addition of fields, familiarity with software such as MARCedit, Gary Strawn software, and Voyager-related usage of Microsoft Access.
- **Batch Processing Staff and Unit Heads, at Expert-Level Access**, have access to basic and advanced-level tasks, as well as to more complicated production procedures, Google Utilities, and reports. Members of this group must have an advanced knowledge of technical services workflows, for use in the development of new processes. The staff member must also be able to analyze large sets of data to identify problems and common elements that allow for batch correction. Staff in this group also examine new software for potential use in automation.
- **Staff with Administrative-Level Access** can use all the tools present in LS Tools. This includes manual execution of all Library Systems "CRON" scripts when needed. Scripts at this level can have considerable library-wide impact.* Managers and senior Batch Processing staff assign jobs to appropriate group levels and give staff access to appropriate levels of batch jobs in LS Tools. Also in the space are scripted jobs of high consequence such as the automated cleanup of Voyager MARC data.

***NOTE:** Some scripts are placed at this level while they are in the later development stages and then can be moved after development is completed to a lower level so that the staff assigned to run it may access it once it is ready for production. Some scripts that are one-time, large scale projects are placed here for use by expert-level users, and removed once the project is complete.

- **Some Selectors** have access to the "Voyager Harvest" area for their own edification. They may or may not have access to other parts of LS Tools, depending upon their other work duties.
- **All LTS Catalogers** working with videos and microforms have access to the "CLAMSS Shelflist Tool." They may or may not have access to other parts of LS Tools, depending upon their other work duties.

Basic Group

I. "General Update" Section of LS Tools

- A. Move LTS or Law EDI File to Voyager Folder
- B. Check for/Remove Carriage
- C. MARC Modification
- D. ENACT Bulk Import
- E. Prepare a Vendor e-Book Load
- F. Prepare a Vendor Print Load

II. "Voyager Harvest" Section of LS Tools

- A. MARC File Examination

- B. View Harvest Output
- C. Develop a Harvest query to identify Voyager Record
- D. Extract MARC Records from Voyager

III. "CLAMSS subsystem"

Advanced Group

I. "Voyager Update Utilities" Section of LS Tools

- A. Prepare a Miscellaneous MARC Input File
- B. Execute a Privileged Production Procedure
- C. Queue BulkImport
- D. Run a Voyager Utility Program

II. "Voyager Reporting Utilities" Section of LS Tools

- A. Execute a Report or Extract
 - B. Match BibIDs from external list
 - C. Other reports/extracts, which are NOT in LS Tools
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Batch Processing/Heads/Expert Group

I. "ALL LS Tools Production" Section of LS Tools

- A. Business Analysis Web Displays
 - B. Cron Jobs for Interaction with OCLC
 - C. Execute a Google Utility
 - D. Cron Jobs with General Access
 - E. Cron Jobs with Privileged Access
 - F. Execute an Administrative Production Procedure
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Administrative Group

I. "Administer LS Tools Itself" Section of LS Tools

- A. Report/Clean Up Voyager MARC Record Errors
- B. Configure LS Tools Tables & Directories