Request for and Life Cycle Development of an Automated or Data Import Job (LTS Procedure #107)

Scope: *The purpose of this procedure is to outline the steps that an LTS or other Library staff member should take when deciding that a potential task should be scripted either by the Batch Processing Unit or by Library IT, via Batch Processing. These steps ensure that LTS managers are aware of who requested the work, as well as the desired outcome. It also ensures that the work will be assigned to appropriate staff with the necessary skills to achieve the desired result in a reasonable time frame.*

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Unit: Automation

Date last reviewed: March 2024

Date of next review: April 2025

A. Inquiry from Stakeholder and Ingest of Data

1. Request should come to bulkload@cornell.edu if it is being submitted by email (preferred unless it is complex enough to warrant a meeting). Head of automation will triage the requests in LibAnswers.
2. Examples of information to be supplied by the stakeholder include:

   a. If a MARC record load, a file or place to retrieve the MARC and vendor contact information.

   b. Specific needs or concerns about the data being worked with.

   c. Type of material being handled, print, e-book, e-journal, videos, etc.

   d. Frequency: one time job, monthly, quarterly, as new files are available.

   e. 899 code requirements.

3. Automation head will assign job to appropriate staff, providing the background information and linking the stakeholder to the staff member should further questions arise.

B. Analysis of Data and Initial Proposal for Processing of Data

1. Staff member reviews the pertinent information and seeks additional information and feedback, as needed.
2. For MARC record loads, staff member will review process with Automation head and vet the finished records with the Original Cataloging Supervisor or other appropriate original cataloger for correctness of the records, noting any changes required.

C. Documentation of Proposed Specification/ Process

1. A specification document will be created in the CUL Tech Services Working Group detailing all pertinent information and the processing steps required.

D. Analysis and Finalization of Proposed Process

1. When script or MARCEdit task is completed, testing is done by Automation Staff Member in the test instance of FOLIO and results are verified as correct by appropriate staff and stakeholder(s).
2. Stakeholder who made request will be informed when processing or initial record load is completed.
3. If appropriate, stakeholder or other designated staff member will be trained to use this process on future records.