



# Batchload Solutions for Bibliographic Records Quick Reference

## What is Batchload for bibliographic records?

Batchload at OCLC is an automated offline method used to process large amounts of records for libraries to set or cancel holdings in WorldCat, add original records, provide OCLC numbers or OCLC-MARC records for library local systems, and more.

## Why use Batchload?

Use Batchload to synchronize your library's holdings with WorldCat to make your collections visible and available through OCLC services such as:

- WorldShare Management Services (WMS)
- WorldCat Collection Analysis
- WorldCat Local
- WorldCat.org
- Group Catalog
- Navigator
- Resource Sharing
- Cataloging

See links to more information in section 8 below about [more OCLC services](#) for getting your library's holdings into WorldCat.

## Summary of Batchload workflow

This Quick Reference covers details of the following steps in a typical Batchload workflow:

1. **Library.** [Chooses the project type\(s\)](#) that fit characteristics of your library's records and define the type of processing you need.
2. **Library.** [Chooses the output](#) you need from the batchload project.
3. **Library.** [Orders batchload project\(s\)](#).
4. **OCLC.** [Sends an order confirmation](#), a unique project ID, and a link to instructions for submitting your records via e-mail.
5. **Library.** [Submits bibliographic records](#) to OCLC for processing (all records or a subset).
6. **OCLC.** [Processes records](#): Runs batchload software that matches the library's records against WorldCat records to:  
--Set and cancel holdings\* in records that match.  
--Add your unmatched records to WorldCat as original cataloging, if requested in your order, and if the records meet quality standards.
7. **OCLC.** [Provides reports and records](#) to help index consistently formatted [OCLC control numbers](#) in your local system or to upgrade your library's records. Provides statistical reports on processing results.
8. **Library.** Keeps holdings current in WorldCat, starting immediately after batchload is completed, by continuing to use OCLC automated batchload services or by using OCLC cataloging services to set and delete holdings manually.

\* **Set or cancel holdings definition** – Batchload sets (adds) or cancels (deletes) your library's OCLC institution symbol in matching WorldCat records to indicate items that your library holds or no longer holds, respectively. When your library's holdings are up-to-date in users see an accurate reflection of your collection in WorldShare Management Services, WorldCat Local, and the other services listed above.

## Important record numbers

### OCLC control number

Maintaining both accurate holdings in WorldCat and consistently indexed [OCLC control numbers](#) in your local system is critical to seamless integration between your library's catalog and WorldCat.

For example, in order for WorldCat Local to display real-time item location and availability for your local catalog, the OCLC number must be indexed in all of your records.

Any of the [three options you select as output](#) of your batchload project provides OCLC control numbers you can use for indexing.

### Local system bibliographic number

Starting February 16, 2011, your local system bibliographic numbers, as specified in your batchload order by location and format in your records, will be stored at OCLC and used as:

- Identifiers that provide your WorldCat Local users with search and display of local bibliographic data that you request in your batchload order to [store your local bibliographic data](#) at OCLC.
- The identifiers to migrate local bibliographic data from your existing local system to WMS, which becomes your local system after your WMS "go live" date, when you request in your batchload order to [store your local bibliographic data](#) at OCLC.

Optimal use of WorldCat Local and WMS depend on your library's unique, persistent local system bibliographic numbers that are in a consistent location in your records. See [more details](#).

**Please note:** The remainder of this document is organized in numbered sections corresponding to the numbered steps listed in the "Summary of Batchload workflow" to the left.

## 1. Choose a batchload project type

Use the project descriptions in this section to select the type(s) of project(s) you need when you [place an order](#). [Instructions for the order form are in green.](#)

**Please note:** You may need more than one type of project.

Reclamation project	
<b>Why order?</b>	Your library's holdings have not been fully maintained in WorldCat, and you cannot easily identify the records that need updating.
<b>What you do</b>	Order a one-time reclamation project and send all of your library's records to OCLC.
<b>How to order</b>	<ol style="list-style-type: none"> <li><b>In the order form question</b>, "Select a Batchload project type," choose <b>One time</b>, then <b>Reclamation</b>.</li> <li>Under "How should holdings be set or canceled," select <b>Cancel for all</b>, <b>Set for all</b>, or <b>Set or cancel based on value of Rec Stat</b>. See details for these choices <a href="#">below</a> in "Holdings actions." (<b>Rec Stat</b> = record status, Leader/05.)</li> </ol>
<p><b>The process:</b></p> <ul style="list-style-type: none"> <li>As your records are matched in WorldCat and holdings are set, the current date is "stamped" on each record.</li> <li>After batchload is complete, OCLC runs a Scan/Delete to remove your holdings from records with a date stamp earlier than the date of the batchload transaction (typically the date when you extracted your records for submittal to OCLC). <ul style="list-style-type: none"> <li>OCLC confirms the date with you before running the Scan/Delete.</li> <li>The Scan/Delete skips records that have local holdings records (LHRs) attached, unless you request to remove the LHR and related holding.</li> </ul> </li> <li>Your unmatched records are added to WorldCat if requested.</li> </ul>	

Retrospective project	
<b>Why order?</b>	You are a new OCLC member, or you have gaps in your WorldCat holdings or in the OCLC numbers in your local system records.
<b>What you do</b>	Order a one-time retrospective project and send all or a subset of your library's records to OCLC.
<b>How to order</b>	<ol style="list-style-type: none"> <li><b>In the order form question</b> "Select a Batchload project type," choose <b>One time</b>, then <b>Retrospective</b>.</li> <li>Under "How should holdings be set or canceled," select <b>Cancel for all</b>, <b>Set for all</b>, or <b>Set or cancel based on value of Rec Stat</b>. See details for these choices <a href="#">below</a> in "Holdings actions." (<b>Rec Stat</b> = record status, Leader/05.)</li> </ol>
<p><b>The process:</b></p> <ul style="list-style-type: none"> <li>Your records are matched in WorldCat and holdings are set or canceled as appropriate. (A Scan/Delete is not included).</li> <li>You receive OCLC control numbers for records in your library system.</li> <li>Your unmatched records are added to WorldCat if requested.</li> </ul>	

Symbol flip project	
<b>Why order?</b>	Your library's holdings are represented in WorldCat by more than one OCLC institution symbol, but you want the holdings to be combined under fewer symbols.
<b>What you do</b>	For symbol flip projects, you do <b>not</b> complete an order or send any records. See next row.
<b>How to order</b>	Send a written request in an e-mail to OCLC Batch Services at <a href="mailto:batchload@oclc.org">batchload@oclc.org</a> .
<p><b>The process:</b> OCLC performs a scan to "flip" all occurrences of one institution symbol to another institution symbol in matched records.</p>	

Cancel holdings only project	
<b>Why order?</b>	Your library removes a large number of items from its collection.
<b>What you do</b>	Send only the records for the items you no longer hold.
<b>How to order</b>	<ol style="list-style-type: none"> <li><b>In the order form question</b>, "Select a Batchload project type," choose <b>One time</b>, then <b>Cancels</b>.</li> <li>Under "How should holdings be set or canceled," the only choice available is <b>Cancel for all</b>.</li> </ol> <p><b>Or</b></p> <ul style="list-style-type: none"> <li>Choose <b>Ongoing</b>, and then choose <b>Cancels only</b>.</li> </ul>
<p><b>The process:</b> OCLC removes your library's holdings in WorldCat for all of the records you send.</p>	

Ongoing batchload project	
<b>Why order?</b>	You want to keep holdings up-to-date, once your holdings are in sync with WorldCat.
<b>What you do</b>	Send the records that are not up-to-date in WorldCat as often as needed in one or more ongoing projects.
<b>How to order</b>	<ol style="list-style-type: none"> <li><b>In the order form question</b>, "Select a Batchload project type," choose <b>Ongoing</b>.</li> <li>Under "What type of project will it be," select <b>Cancels only</b>, <b>Sets only</b>, or <b>Set or cancel per record status</b>. See details for these choices <a href="#">below</a> in "Holdings actions."</li> </ol>
<p><b>The process:</b></p> <ul style="list-style-type: none"> <li>OCLC continues to process your records as set up in the project whenever they come in.</li> <li>OCLC returns your batchload output for each file of records as the records finish processing.</li> </ul>	

Non-MARC “patterned” bibliographic data project	
<b>Why order?</b>	Your library does not have MARC records, but you can export your bibliographic data into a spreadsheet or tab-delimited text file.
<b>What you do</b>	Send your bibliographic data—such as author, title, date—in a consistent, discernible pattern.
<b>How to order</b>	<ol style="list-style-type: none"> <li>1. In the order form question, “Identify the format of the data you are submitting for this project,” choose <b>Non-MARC</b>.</li> <li>2. Under “Format,” select the type of file you will send: <b>Spreadsheet, Delimited text, Labeled data, or Other</b>.</li> <li>3. Under “Type of data,” select <b>Bibliographic</b>. (In the question “Select a Batchload type,” you can choose <b>One time or Ongoing</b>.)</li> </ol>
<b>The process:</b> OCLC converts the data to MARC for matching and setting or deleting holdings.	

Non-MARC—Numeric search key project	
<b>Why order?</b>	Your library does not have MARC records, nor can you export data for OCLC to convert.
<b>What you do</b>	Send a list of numbers from the numeric data in your records to match in WorldCat. Send a file of LCCNs, ISBNs, or OCLC control numbers. You can send only one file per number type; you cannot, for example, mix LCCNs and ISBNs in a single file. However, you can send multiple files.
<b>How to order</b>	<ol style="list-style-type: none"> <li>1. In the order form question, “Identify the format of the data you are submitting for this project,” choose <b>Non-MARC</b>.</li> <li>2. Under “Format,” select the type of file you will send: <b>Spreadsheet, Delimited text, Labeled data, or Other</b>.</li> <li>3. Under “Type of data,” select <b>List of numeric search keys</b>. (In the question “Select a Batchload type,” you can choose <b>One time or Ongoing</b>.)</li> </ol>
<b>The process:</b> OCLC matches the numbers in WorldCat for setting or deleting holdings.	

**Note:** Instructions for sending patterned non-MARC bibliographic data or a list of numeric search keys also [describe how to create](#) your non-MARC data or numeric search key files.

### Separate batchload orders for each project type

You need to submit a separate order for each project type to ensure correct setup and get a unique project ID for tracking.

For example:

- Your library may order a reclamation project for your overall collection, send all of your records for processing, and get the OCLC numbers back in a Cross Reference report for indexing in your local system.
- You may also want OCLC-MARC records for a small collection that has only brief records. To get the MARC records, you need to complete a separate order and send only those records.

## 2. Choose an output option

Use the following output descriptions to select an output when you [place an order](#), based on your library’s needs to:

- Index OCLC control numbers (for integrating your records with WorldCat)

Or

- Upgrade your records.

Instructions for the order form are in green.

Cross Reference (XREF) report								
<b>What is this?</b>	Two-column text file that lists the OCLC number (without prefix) across from the unique local record ID in field 001.							
<b>Why select?</b>	You want to match and merge the OCLC numbers into the bibliographic records in your local system for indexing. You do <b>not</b> want either your records returned or OCLC MARC records returned.							
<b>How to order</b>	In the order form question, “What output do you want to receive when your project is completed,” choose <b>Report only</b> .							
<b>How to retrieve</b>	Download from the Product Services Web (PSWeb) as each file in your project finishes processing. See <a href="#">instructions</a> below.							
<b>Example of report format</b>	<table border="1"> <thead> <tr> <th>OCLC control #</th> <th>Local record ID from 001 field</th> </tr> </thead> <tbody> <tr> <td>48110776</td> <td>.b21361198</td> </tr> <tr> <td>179104583</td> <td>.b21512760</td> </tr> </tbody> </table>	OCLC control #	Local record ID from 001 field	48110776	.b21361198	179104583	.b21512760	
OCLC control #	Local record ID from 001 field							
48110776	.b21361198							
179104583	.b21512760							
<b>Note:</b> There is no charge for ordering Cross Reference reports as your output.								

Your records returned with OCLC numbers	
<b>Note:</b> This option is unavailable for non-MARC data projects (that is, projects based on either non-MARC bibliographic data or a list of numeric search keys).	
<b>What is this?</b>	Batchload merges matching OCLC control numbers into the records you sent that matched and returns them to you.
<b>Why select?</b>	Provides the basis for indexing the OCLC control number.
<b>How to order</b>	In the order form question, “What output do you want to receive when your project is completed,” choose <b>Report and your records</b> . You can also select the location and format you want for the OCLC numbers in your returned records. (This option is unavailable for projects based on non-MARC data.)
<b>How to retrieve</b>	Download from the <a href="#">PSWeb</a> or via <a href="#">FTP</a> as each file in your project finishes processing. (Click a link to see instructions below.)
<b>Note:</b> There is no charge for ordering your records returned with OCLC numbers inserted as your output.	

**Caution:** Ordering OCLC MARC records as output of your batchload project incurs a charge. Before you request OCLC MARC record return in your order, please contact OCLC Support for details at [support@oclc.org](mailto:support@oclc.org).

### Full OCLC-MARC records returned

Note: This option is unavailable for projects based on a list of numeric search keys.

<b>What is this?</b>	Batchload provides copies of the MARC records in WorldCat that matched your records.
<b>Why select?</b>	Upgrade your library's records and provide the basis for indexing the OCLC control numbers. By default, the OCLC numbers are in these fields: <ul style="list-style-type: none"> <li>• 001 prefixed by <i>ocm</i> or <i>ocn</i></li> <li>• 035 \$a prefixed by (<i>OCoLC</i>)</li> </ul>
<b>How to order</b>	In the order form question, "What output do you want to receive when your project is completed," choose <b>Report and OCLC-MARC records</b> . (This option is unavailable for non-MARC data projects that are set up to cancel holdings only.)
<b>How to retrieve</b>	Download from the <a href="#">PSWeb</a> or via <a href="#">FTP</a> as each file in your project finishes processing. (Click a link to see instructions below.)

Note: OCLC can merge local data—for example, your local system control number—into the OCLC-MARC records (see [details](#)).

## 3. Order a batchload project

### Before you order

**Highly recommended:** Fill out the [Order Checklist for Bibliographic Batchload](#) that exactly reproduces the questions to prepare the information for ordering ahead of time.

### To order

Place all batchload orders in the Online Service Center (OSC):

1. Go to the [OSC login page](#).  
(<https://www.oclc.org/webapp/wcs/stores/servlet/OSCPortal?storeId=10051>)
2. In the navigation list on the left, click **Log on**.
3. Enter the **User ID** and **Password** for your OSC, WorldCat.org, FirstSearch, or WebJunction account, if you have one.  
Or  
Click **Create a new account** and set up an OSC account.
4. Click **Log On**.
5. On the OSC Welcome page, click **Order OCLC products and services**, and then on the Order page, click **OCLC services**.
6. On the OCLC services page, click **Batchload for Bibliographic Records**, or click the **Order** button to the right.
7. Follow directions to complete and submit the form.

Note: In the final question of the order, "Do you have more information to add about your project," add more instructions if needed.

**Caution:** You are required to accept [terms and conditions](#) to place your order.

See details for ordering in [chapter 3](#) of the *OCLC Batch Services User Guide*, including instructions for correcting errors and editing the order.

### Problems that cause you to cancel your order?

If you cancel your order, a form opens for sending comments to OCLC. An OCLC Customer Support staff person will contact you within two business days to help resolve the problem.

### Caution: What you need to know about batchloading your vendor-supplied records

You can include vendor-supplied records in a batchload project to set your library's holdings. However, to add them to WorldCat if unmatched, your library or OCLC must have permission from the vendor to redistribute the records. Please check your vendor contracts. To check OCLC vendor licensing:

1. Go to the "Vendor record licensing" Web page at: <http://www.oclc.org/us/en/worldcatlocal/support/vendor.htm>.
2. Click the first link—**Vendor record sets accessible...**, and then click **Download the Databases and Collections list**.
3. In the File Download window, click **Open**.
4. Click the second tab in the lower left of the Excel spreadsheet.

**How to batchload "restricted use" records.** To set your holdings on records from vendors who have **not** granted permission to redistribute records, order a separate batchload project for these "restricted use" records, and select **No** in the bibliographic batchload order form for the question about adding unmatched records.

Note: See more below about using the [WorldCat knowledge base](#) as an alternative to batchload for setting holdings for electronic resources and for managing vendor license terms.

## 4. Receive order confirmation and project ID

### After successfully submitting your batchload order

You receive two e-mail messages:

- One from the Online Service Center with a "WEB-xxxxxx" number, confirming that your order was transmitted to Batch Services.
- Another from OCLC Batch Services that provides:
  - Your unique batchload project ID (a "P" number—for example: "P012345").  
Please note: **Always use your project ID** when you submit your files and when you communicate with OCLC about your project.
  - Your order data to check
  - A link to file submittal instructions.
- Your project is set up automatically based on your order data.

### Are there problems with your order data shown in the e-mail?

Reply directly to the e-mail order confirmation from OCLC Batch Services that has your Project ID **before you submit your data** if you have changes to your order or questions about your project.

## 5. Submit your records or data to OCLC

### Get instructions for submitting records:

Click a link below for your submittal method for instructions:

- [Send Records for Batchload Using PSWeb](#)
- [Send Records for Batchload Using FTP](#)
- [Send Records for Batchload Using Your Innovative \(III\) Local System](#)
- [Send Non-MARC Data for Batchload via E-mail or Physical Media](#)

**Caution: To prevent file submittal problems using PSWeb or FTP:** Go to the instructions for [PSWeb](#) or [FTP](#) submittal and follow:

- Recommendations for file size and number of files to submit/day.
- File naming conventions and instructions for creating the LABEL file corresponding to each DATA file.

### OCLC picks up your files

- OCLC picks up files around 2:00 am U.S. Eastern Time each day.
- On the same day, you will receive a notification that your files were received. If you do not get a notification, contact Batch Services at [batchload@oclc.org](mailto:batchload@oclc.org).

### What happens to your records?

If you are a U.S. library ordering only for your institution, **and** you can provide MARC 21 records, **and** you do not need to receive OCLC-MARC record output, as soon as OCLC receives your files:

Either...

- Your records start processing automatically with no prior review needed by OCLC Batch Services staff.
- Within minutes after OCLC pickup, you receive an automated e-mail to let you know that processing has begun on your project. Customized information is inserted to confirm how your records will be processed, based on your order selections.

Or...

If your project does **not** have the characteristics listed above and instead, has one of the characteristics listed in the table below:

- You receive an e-mail notification that your files were received.
- The files go into an evaluation queue for customized setup.
- An OCLC Batch Services database specialist reviews your project and may contact you for more information if your project has any of the following characteristics:

If your project is ...	A database specialist ...
Non-U.S. order	Reviews for varying cataloging practices
Order for a group (multiple libraries)	Requests data from you to correlate local library identifiers in records with OCLC institution symbols of libraries in your group See more on <a href="#">providing library identifiers</a> .
Order that requests OCLC-MARC record output	Contacts you about whether to retain local data from your records in the MARC records you receive. See <a href="#">more details</a> .
Order based on non-MARC "patterned" data	Evaluates the data for converting to MARC records and matching against WorldCat.
Order based on a list of numeric search keys	Provides special processing—the numeric keys are matched against WorldCat.

## 6. How OCLC processes records

This section summarizes how batchload processes work. These are **default** settings. Projects reviewed by a database specialist may have other settings. For more details, see [section 5](#) of the *Batch Services User Guide*. Some processing depends on your order; [instructions for the order form](#) are in green.

Unique key matching	
<b>OCLC number</b>	Properly formatted OCLC control numbers are mapped to field 035 \$a and prefixed with (OCoLC) for use by batchload software. You can select to apply qualifiers to OCLC number matching to cross-check other data in matched records.  <b>How to order OCLC number qualifiers:</b> <b>In the order form question, "Do you want to qualify the OCLC number for record matching,"</b> select which, if any, of these qualifiers to apply: <ul style="list-style-type: none"> <li>Derived title (field 245, 246, 247)</li> <li>Date (008/07-10)</li> <li>Material type (Leader/06)</li> <li>Language of cataloging (040 \$b).</li> </ul>
	See more about <a href="#">selecting OCLC number qualifiers</a> .
<b>Other unique keys</b>	The following are unique keys used for matching. The OCLC number qualifiers listed above are applied. <ul style="list-style-type: none"> <li>010 \$a (LCCN)</li> <li>016 \$a (National bibliographic control number)</li> <li>020 \$a (ISBN)</li> <li>022 \$a (ISSN)</li> <li>024 \$a (Other standard number)</li> <li>027 \$a; \$z and 088 \$a; \$z (Report number)</li> <li>028 \$a and 262 \$c (Publisher number)</li> <li>029 \$a (Other system control number)</li> <li>030 \$a (CODEN)</li> <li>856 \$u (Uniform resource identifier)</li> </ul>

### Extended matching

When one of the following occurs:

- An OCLC control number is not available
- The qualifiers rule out the OCLC number as a match
- A single match is not retrieved by the other unique keys

The system uses extended matching based on additional data in the body of the record (author, title, publisher, and more).

### Enriching WorldCat automatically

LC call numbers and subject headings or Dewey call numbers, content notes, and summaries in your records may be merged into matching WorldCat records that lack these numbers, headings, or notes.

### Adding unmatched records

When you order, you can select the option to add your unmatched records to WorldCat as original cataloging.

**How to order:**  
**In the order form question, "Should we add your records when they do not match existing WorldCat records,"** choose **Yes**.  
See the [Caution](#) about adding (unmatched) vendor-supplied records.

### Storing local bibliographic data

When you select the option to store local bibliographic data at OCLC for display in your OCLC discovery interface when you order:

- Batchload creates local bibliographic data records attached to the associated WorldCat bibliographic records.
- The data is not added to WorldCat records. You cannot view or edit it in Connexion. It is visible only through your OCLC discovery interface and can be maintained only through batchload.

**How to order:**

1. **In the order form question**, "Do you want to display local bibliographic data to your users via WorldCat Local or WorldShare Management Services," choose **Yes**.

**Notes:**

- You will not see this question unless you select "WorldCat Local" and/or "WorldShare Management Services" in the previous question about which OCLC products your batchload project will support.
- The question is also unavailable if you are ordering a project to cancel holdings only or a project based on numeric search keys.

2. If **Yes**, select check boxes for the local bibliographic data fields you want to store for display. The fields are identified by name and tag.
3. Complete the final question, "Does your system store the data you want to display in the fields listed above?"
  - If your data is stored in fields with the same tags in the list you selected from, click **Yes**.
  - If your data is stored in different fields, click **No**.

If **No**, you will need to send a mapping table to Batch Services at [batchload@oclc.org](mailto:batchload@oclc.org) after receiving your order confirmation e-mail with your project ID ("P" number) and after you send your records for processing.

See more information about [storing local bibliographic data](#) and, if needed, instructions for creating and sending a data mapping table.

### Holdings actions

- Batch processing uses record status (**Rec Stat**, Leader byte 05) to determine whether to cancel or set your holdings in WorldCat.
- When record status (Rec Stat) contains the value **d**, your institution's holding symbol is canceled on matching WorldCat records.
- For any record status value **other than d**, your holding symbol is set on matching and newly added records.

Batchload can preprocess your records to manipulate data in the records if needed to perform the holdings action you select in your order.

If you select this holdings action...	Preprocessing does this...
<ul style="list-style-type: none"> <li>• Cancel for all</li> <li>Or</li> <li>• Cancels only</li> </ul>	Forces the record status value <b>d</b> for all records submitted, regardless of the value in your records, so that your holdings are canceled on all matched WorldCat records.
<ul style="list-style-type: none"> <li>• Set for all</li> <li>Or</li> <li>• Sets only</li> </ul>	Changes any occurrence of <b>d</b> in record status to <b>c</b> , so that your holdings are set for all matching or added records.
<ul style="list-style-type: none"> <li>• Set or cancel based on Rec Stat</li> </ul>	Uses the record status value in your records, so that your holdings are canceled for matched records with value <b>d</b> , and holdings are set for matched records with any other value.

### Holdings actions

**How to order holdings actions:** Your selection of holdings action depends on the type of project you order.

**In the order form question**, "Select a Batchload project type," select the type of project you want and then select the holdings action:

- Select a one-time reclamation project, and then select: **Set for all** or **Set or cancel based on Rec Stat**.

Or

- Select a one-time retrospective project, and then select: **Set for all** or **Set or cancel based on Rec Stat**.

Or

- Select a one-time cancels project, and then select: **Cancel for all** (only choice allowed)

Or

- Select an ongoing project, and then select: **Cancels only** or **Sets only** or **Set and cancel per Rec Stat**

Or

- Select a project for your non-MARC data ("patterned" bibliographic data or a list of numeric search keys), and then select: **Cancel for all** or **Set for all**

## 7. OCLC provides reports and records

### Reports

Besides the Cross Reference report and any records you order (your own records or OCLC-MARC records), your batchload project generates statistical reports and may generate exception data files.

The following reports are always produced:

Report	Description
File Processing Summary Report	<ul style="list-style-type: none"> <li>• Produced for each file as it finishes processing</li> <li>• Shows statistics for the file (number of records processed, duplicates dropped, holdings set, and more)</li> <li>• File name in format: <b>D[yymmdd]R[order number].FILESUM.HTML</b>, where <b>D[yymmdd]</b> represents the date your file completed processing and <b>R[order number]</b> is an order ID that OCLC uses for internal tracking. <b>Example: D100422.R27663.FILESUM.HTML</b></li> </ul>
Project Processing Summary Report	<ul style="list-style-type: none"> <li>• Produced for one-time projects, when the project is completed and closed.</li> <li>• Shows statistics for the entire project.</li> <li>• File name is in the format: <b>D[date processed].R[order number].PROJSUM.HTML</b> <b>Example: D100424.R27676.PROJSUM.HTML</b></li> </ul>
Cross Reference Report	<ul style="list-style-type: none"> <li>• Produced for each file as it finishes processing.</li> <li>• File name has an <b>.XREF</b> extension. <b>Example: D100422.R27663.XREF</b></li> </ul>

**Records**

The following files of records may be available, depending on whether you ordered them or depending on the outcome of your project.

Records	Description
Your records with OCLC numbers	<ul style="list-style-type: none"> <li>Produced only if you ordered them</li> <li>Generated for your records that matched in WorldCat</li> </ul>
Full OCLC-MARC records	<ul style="list-style-type: none"> <li>Produced only if you ordered them</li> <li>Generated for matches between your records and WorldCat</li> </ul>
Exception data	<ul style="list-style-type: none"> <li>Produced for records that could not be matched or added in WorldCat through multiple processing tries.</li> <li>These records include, for example, deselected, unresolved, and duplicate records. See more details in <a href="#">chapter 6</a>, "Exception Data (Records Remaining)," in the <i>Batch Services User Guide</i>.</li> </ul>

**Pick up your reports and records**

Batch Services notifies you when records and reports are ready. The files are posted to the OCLC Product Services Web (PSWeb) and to your OCLC Electronic Data Exchange (EDX) account if you have one. The files are available for 90 days after they are posted.

**Pick up from PSWeb**

- In your Web browser, go to <http://psw.oclc.org>.
- On the Welcome page, click **Records and Reports**.
- Under Records and their Associated Reports, click **OCLC Batch Services records and reports**.
- Enter your OCLC authorization and password if not already logged on, and click **OK**.
- In the list of record and report files generated for your displayed OCLC institution symbol, click **Download** next to a file to save the file to a folder you select.  
Or  
Click **View** to view the file.

**Notes on valid authorizations for PSWeb logon**

- Use your OCLC cataloging, FirstSearch (with an administrative or statistics password), or resource sharing authorization and password if you have one.
- If you do not have one, when you order, you can request a PSWeb-only authorization from [orders@oclc.org](mailto:orders@oclc.org).
- In the order, provide your own preferred password (use uppercase letters A-Z, digits 0-9, and/or characters # @ \$ and use a letter or digit as the first character).

**Pick up from EDX**

- Using an FTP client, enter **ftp edx.oclc.org**.
- Enter your EDX account user name in format `t [OCLC symbol]1`
- Enter your password (initially the same as your user name, but you are required to change it the first time you log on).
- Click **OK**.
- Change the directory to '**EDX.EBSB.[OCLC symbol].FTP**' (always include the single quotation marks).
- Verify that the transfer type is set to binary (**bin**).
- Enter `get [file name]` (batchload file names include "EBSB").

See more details on reports and records in [chapter 7](#) of the *Batch Services User Guide*.

**8. Ways to continue maintaining your library holdings in WorldCat following batchload**

Keeping your holdings up-to-date in WorldCat **after** your batchload project is completed is critical to your library's effective use of OCLC services (see a brochure for more [details](#)).

Continuing to use batchload is one efficient way. The list below shows other OCLC services for maintaining holdings, depending on your library's specific needs. Click a link to learn more:

- [CatExpress](#)
- [Connexion](#)
- [CONTENTdm](#)
- [Contract Cataloging](#)
- [eSerials Holdings Service](#)
- [GovDoc](#)
- [WorldCat Cataloging Partners](#)
- [WorldCat Collection Sets](#)
- [WorldCat knowledge base](#) \*\*\*

**\*\*\* WorldCat knowledge base:**

**A batchload alternative for long-term management of electronic resources for WorldCat Local and WorldShare Management Services (WMS).**

The [WorldCat knowledge base](#) (included at no extra charge in your OCLC Cataloging subscription) is a non-batchload alternative for managing your electronic resources efficiently for the long term.

The knowledge base combines data about your library's electronic content with linking features that enable access to the content of your e-books, full-text articles and more. It sets your holdings in WorldCat automatically and provides a license management feature for managing vendor-supplied data for electronic resources.

**For short-term immediate exposure, continue to use batchload:** Just as WorldCat grows from the records created and added by libraries, the knowledge base grows as libraries enter their electronic collections. If your library is not yet using the WorldCat knowledge base and you have resources that you need to make accessible to users immediately via WorldCat Local or WMS, for the short term, do use batchload:

- If you have holdings records (based on MARC21 Format for Holdings Data) with OCLC control numbers, you can use batchload specifically for updating your OCLC local holdings

records (LHRs). This type of batchload is called the Local Holdings Record Updating service. Use it for your electronic resources to update or add URLs in field 856.

See the [Local Holdings Record Updating Service User Guide](#) for more information about managing local holdings records.

- If you do not have holdings records, use an enhanced bibliographic batchload project to create level-2 LHRs from bibliographic data.

See more information in [Local Holdings Record Batchload for Branch Level Scoping](#) before discussing the details with your WorldCat Local or WML implementation manager.

### Support

If you have questions or need help, please contact OCLC Customer Support:

**By phone:** 1-800-848-5800 (U.S.) or 1-614-793-8682 (international)

From 7:00 am to 9:00 pm, U.S. Eastern time, Monday – Friday

Or

**By e-mail:** [support@oclc.org](mailto:support@oclc.org)

### Feedback on documentation

We'd like your opinions about this OCLC documentation. Please send an e-mail with comments and suggestions to [doc@oclc.org](mailto:doc@oclc.org). Include the title of this document in the subject line or body of the message.