

Instructions for Batchload Projects

The instructions below are for a Batch Reclamation project and will apply to libraries that already have records in WorldCat. The process is slightly different for libraries that do not yet have holdings in World-Cat (although the process is similar).

* Please note: Libraries that use Innovative Interfaces (III) as their local system, need to send records using ftp. Instructions can be found here:

www.oclc.org/content/dam/support/batchload/documentation/using/FTPInnovativeinstructions.pdf

An ftp account would need to be set up if the library does not already use ftp with OCLC.

Other libraries have the option of using ftp or the Product Services Web (PSWeb). This requires a cataloging authorization to send, retrieve and access files. These instructions are located at:

www.oclc.org/content/dam/support/batchload/documentation/using/PSWebinstructions.pdf

Order Form

For the question on the order form, “Which OCLC product will be supported by your project?” the response will be “Alberta Group Catalog”.

Introduction

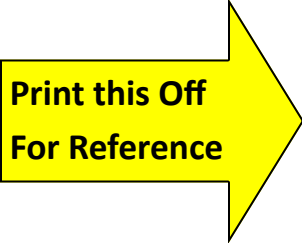
With a Batch Reclamation project, your library would send the complete file of records from your local system to OCLC. OCLC would then compare these records with your actual holdings in OCLC WorldCat and update the holdings as needed. It not only sets or verifies your holdings in WorldCat, but it also will remove holdings for items no longer in your collection.

Step 1 :

The order form is located in the Online Service Center at www.oclc.org/servicecenter. If you do not already have an account to this area, you will need to create one in order to submit the order. When the account has been set up, you will receive email notification from our Orders Department. Prior to logging on to submit the order, please refer to the information below.

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Step 2:



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For Reference

The "Order Checklist for Bibliographic Batchload" helps prepare for questions on the order form and includes links to more information. You may need to contact your local system vendor to answer the question on the location of your local system control number in your records.

The Checklist is located at: <https://www.oclc.org/content/dam/support/batchload/documentation/using/checklistfororderingBib.pdf>

The "Batchload Solutions for Bibliographic Records Quick Reference" describes the types of batchload projects for bibliographic records, options for ordering a project and receiving output, how to order, and more. Information in green will help with specific questions on the order form. This is located at:

<https://www.oclc.org/content/dam/support/batchload/documentation/using/bibbatchsolutions.pdf>

For "output" after your records have been processed, you can request that your library's records that are sent for this project, be returned with the OCLC number added in a specific field. This is an option at no additional charge.

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Step 2 (Continued):

A cross-reference report is also provided upon project completion. Either of these can be used to ensure the records in your local system have the OCLC numbers in them. The presence of the OCLC number in the record may be essential for other services that OCLC offers and will also help with keeping holdings up to date. For more information about batchload projects, matching and reports provided when the project is completed, please refer to the "OCLC Batch Services User Guide" at:

https://www.oclc.org/content/dam/support/batchload/documentation/using/guide/7_summaryofreportsandrecords.pdf

Step 3 :

The order form to use in the "Online Service Center" at <http://www.oclc.org/servicecenter> and is under "OCLC Services" then "Batchload for Bibliographic Records." After your order has been received, you will receive a Project ID, and then, can proceed with sending in the files.

A Batch Reclamation Project may take up to 90 days to complete. During this time, catalogers can continue with all processing with the exception of deleting holdings. The delete holdings action can resume after the Batch Reclamation Project has been completed.

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Step 4 :

You will receive email notification when your project is ready to begin and when it has been completed. There will also be records and reports ready for you to pick up from the "Product Services Web" at:

<http://psw.oclc.org>

On the order form, you can request an authorization to pick up these records, or use a cataloging authorization. To help with a review of reports following your project, please refer to the Chapter 6 and 7 of the "OCLC Batch Services User Guide" at:

<http://www.oclc.org/support/services/batchload/documentation/using/guide.en.html>

Libraries do have the option of getting their record (the records they send to OCLC) returned with the OCLC number added if not already present. On the order form, the library would need to request this option, and also indicate the field and format for the OCLC number.

After files for this project have been submitted, catalogers need to add and delete holdings through the Connexion service or through ongoing batchload projects to set and cancel holdings.

For Further Questions Please Contact:

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