



Send MARC Records for Batchload Using PSWeb

When to send your records

As soon as you order a batchload project for MARC **bibliographic records** or for MARC (**MFHD**) **local holdings records** (LHRs) and receive a confirmation e-mail from Batch Services with your assigned project ID (a “P” number; example: “P012345”), you can send your records to OCLC.

Caution: Please be sure to inform Batch Services first if you are logging on to PSWeb to upload your records using an authorization for an OCLC institution symbol other than the OCLC symbol you used to order your batchload project (see [step 4 below](#)).

Three-step process

To upload your records to the Product Services Web (PSWeb), follow these general steps.

Step 1	Create DATA file(s) containing your records.
Step 2	Create a LABEL file for each DATA file, with required information about the DATA file.
Step 3	Upload the DATA and LABEL files via PSWeb.

What you need:

- Plain text editor such as NotePad (**do not** use Word)
- Web browser
- OCLC authorization and password: Use one of the following:
 - Your existing cataloging, FirstSearch (with an administrative or statistics password), or resource sharing authorization
 - The new PSWeb-only authorization that you requested from orders@oclc.org when you ordered your project.

Caution: Please read all detailed instructions before proceeding. Inaccurate data, file naming, or LABEL file content can delay record processing and project completion.

Step 1. Create DATA file(s)

1. Copy your MARC records to one or more files.

Caution: Please follow [recommended limits](#) on the next page for file size and number of files to submit per day.

2. Name the DATA file using these conventions:

- Use alphanumeric characters only (no hyphens, dashes, or other non-alphanumeric characters).
- Use no more than eight characters between periods (.).
- Use the following required naming convention to match the corresponding LABEL file:
 - Type **DATA.D** followed by the current date in the format *yyymmdd*.
Example: DATA.D090328
 - If you submit multiple DATA files, use the same name but add the extension **.FILE** followed by a unique number for each file.
Example: DATA.D090328.FILE1, DATA.D090328.FILE2, DATA.D090328.FILE3, and so on
- **If you ordered a one time batch project:**
For the last file you send for your project, **replace the .FILE extension with the extension .LAST**. The **.LAST** extension signals Batch Services that you have sent all of your records and then OCLC can complete your project and generate summary reporting.
Example: DATA.D090328.LAST

Note: If your project consists of only one file, add only the extension **.LAST** to the file name.

Examples of complete DATA file names:

DATA.D090328.FILE1,
DATA.D090328.FILE2 (project with multiple files)
Or
DATA.D090328.LAST (last or only file in a one time project)

3. Repeat steps to create as many DATA files as needed for your records and remain within the 90,000 records per file limit (approximately 100 MB) (see notes on file limits on the next page).

Recommended limits on file size and number of files to submit per day

- OCLC Batch Services recommends a file size limit of 100 megabytes (MB) and a limit of submitting 19 sets of DATA and LABEL files per day. This file size accommodates:
 - Up to 90,000 MARC bibliographic records
 - Up to 300,000 MARC holdings records ([MFHD](#)) for LHRUS projects only
- **Smaller and fewer bibliographic record files for uploading to PSWeb.** OCLC recommends smaller files of 50 MB, or about 40,000 to 45,000 records, to avoid possible timeout issues with uploading larger files using Web-based file transfer interfaces such as PSWeb. (These problems are rarely an issue for files of holdings records.) Also limit uploads to 10 sets of files/day.
 - If you want to upload larger bibliographic record files (100 MB) to PSWeb, we recommend that you transfer one DATA and one LABEL file at a time and wait for the transfer to complete successfully before uploading more files.
 - If these guidelines for PSWeb upload do not work for you, please use FTP transfer instead.
- If you are submitting a large number of files via either PSWeb or FTP, OCLC highly recommends sending only one or two sets of DATA and LABEL files the first day; any problems in your LABEL file data or in file naming conventions can be corrected before you send other files.

Step 2. Create a LABEL file for each DATA file

1. Open a new document in a text editor such as NotePad (do not use Word).
2. Type each of the five field labels listed in the following table on separate lines, each followed by two blank spaces and then the data.

See the instructions, guidelines, and a LABEL file example in the next column.

Type label	Enter two blank spaces and then this data
DAT	Date the DATA file was compiled, in format <i>yyymmdd</i> , followed by 000000.0 , no spaces
RBF	Number of records in DATA file, no comma
DSN	DATA file name
ORS	OCLC institution symbol
FDI	Batch Services-assigned project ID; that is, the "P" number that you receive in your Batch Services order confirmation e-mail. Example: P012345 Caution: Do not use the WEB-xxxxxx number sent by the Online Services Center that confirms your order was transmitted.

Guidelines for the LABEL file:

- Type all content in capital letters.
- Do not add any other data or notes.
- Entering the two spaces between each label and the data is critical.
- Preferably, use a fixed length font, such as Courier New, rather than a variable-length font, so that you can clearly see and fix any spacing errors.
Example: To change the font in Notepad, click **Format > Font**. In the **Font** list, click **Courier-New**.
- Press <Enter> to enter the next field.

Example of LABEL file content. Replace each ■ with a blank space. Note that the font in this example is Courier New.

```

DAT■■■20090328000000.0
RBF■■■75000
DSN■■■DATA.D090328
ORS■■■OCL
FDI■■■P011871
    
```

3. Click **File > Save** to name and save the file:
 - a. In the **File name** box of the **Save As** window, type **LABEL.D**, then the current date in the format *yyymmdd*.
Example: LABEL.D090328
 - b. Add the **.FILE** extension if you create multiple LABEL files, followed by the same number as the DATA file it describes.
Examples: LABEL.D090328.FILE1, LABEL.D090328.FILE2, and so on
 - c. **If you ordered a one time batch project:**
For the LABEL file that corresponds to the last DATA file you send, **replace the .FILE extension with the extension .LAST**.
Note: If your project consists of only one file, add only the extension **.LAST** to the name.

- d. In the **Encoding** list, select **ANSI** if not already selected. Other encoding types may cause file errors.

Examples of complete LABEL file names:

LABEL.D090328.FILE1,
LABEL.D090328.FILE2 (project with multiple files)
Or
LABEL.D090328.LAST (last or only file in a one time project)

Step 3. Log on to PSWeb and upload your files

- 1 In your Web browser, go to <http://psw.oclc.org>.
- 2 In the list of links on the left, click **File uploads**.
- 3 On the File Uploads page, click **OCLC Batch Services (Batchload orders with project number Pnnnnnn)**.
- 4 Enter your OCLC cataloging or resource sharing logon authorization and password (associated with the same OCLC institution symbol you used to order your batchload project) and click **Enter**.
Or
Use the new PSWeb-only authorization you received from orders@oclc.org, if you requested one in your batchload order.
- 5 Send the DATA file first. Under **Data File(s)**, type the full path and file name of your DATA file, or click **Browse** and locate the file.
- 6 Send the LABEL file next. Under **Data File(s)**, enter the path or locate the corresponding LABEL file.
- 7 Enter more pairs of DATA and LABEL files as needed, following the recommended limits described above.
- 8 Click **Upload Files**. Your files should appear in the **Current Files** list below the **Upload Files** button.
- 9 Click **Log Out** below the list of links on the left.

Result: Files successfully sent to OCLC are picked up by an internal process at approximately 2:00 a.m. U.S. Eastern Time each day. Shortly after OCLC pickup, you will receive an e-mail notification that OCLC received your file. If you do not receive the e-mail, please contact OCLC Batch Services at batchload@oclc.org to investigate.

More information

- [Batchload Solutions for Bibliographic Records](#)
- [Local Holdings Record Updating Service User Guide](#)

See separate instructions for sending MARC records for batchload [using FTP](#) or [using an Innovative local system](#).

Support

Contact OCLC Customer Support by phone at 1-800-848-5800 or by e-mail at support@oclc.org if you have questions or need help.