7 Get Batchload Reports and Records

Last revised September 2010

7.1   Get 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.

Besides generating the Cross Reference Report and any output records you order (your own records with OCLC numbers or OCLC-MARC records), your batchload project generates statistical reports and can generate exception data files.

7.1.1 Get reports and records using PSWeb

To use PSWeb to get reports and records:

	Action
1	In your Web browser, go to http://psw.oclc.org.
2	On the Welcome page, click **Records and Reports**.
3	Under **Records and their Associated Reports**, click **OCLC Batch Services records and reports**.
4	Enter your OCLC authorization and password, if you are not already logged on, and click **OK**. See the Notes on valide PSWeb logon authorizations following this procedure. The Records and Reports page shows a list of records and reports generated for your displayed OCLC institution symbol.

5	Identify your files.
	
	 • Cross Reference Report files are named with a "D" number (date processed), followed by an "R" number (internal OCLC file tracking number called the Order ID), followed by the file extension .XREF.
	
	       Example: D100424.R27663.XREF
	
	 • Files of your records returned with OCLC control numbers or files of full OCLC-MARC records, depending on whether you ordered one of these, are named with the same "D" number followed by the "R" number, but they have no file extension.
	
	       Example: D100424.R27663
	
	 • Any other report and record files created by processing your project will also include the "R" number. See more about reports and records in section 7.2.

6	Click **Download** next to a record or report file (or click **View** to view the file).
7	In the Save As screen, enter a path name or navigate to the folder where you want to save the file, and click **Save**.

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 of these authorizations, you can request a PSWeb-only authorization when you order your batchload project, or send a request to orders@oclc.org.

- Provide your own preferred password. Use uppercase letters A-Z, digits 0-9, and/or characters # @ $. Use a letter or digit as the first character.

7.1.2 Get reports and records using EDX

To use EDX to get reports and records:

	Action
1	Using an FTP client such as WSFTP_Pro or Blue Zone, enter: **ftp edx.oclc.org**
2	Enter your EDX account user name in the format: **t**[xxx]**1** (replace [xxx] with your OCLC institution symbol and enter a **1**, the number one, not the letter "ell") **Example:** tOCL1

3	Enter your password.
	
	The first time you use your account, you must change the initial default password, which is the same as your user name
	
	      Example: tOCL1
	
	a. In the password box, type a single string with your initial default password followed by your new password twice, separating each password with a slash:
	
	    [initial default password]/[new password]/[new password].
	
	      Example: tOCL1/blue1234/blue1234
	
	    The new password must be eight characters (use A-Z, #, $, or @) and must include at least one number (0-9).
	
	      Example: blue1234
	
	b. Click **OK**.
	
	    Note: The next time you log on, you may get a password error if you happened to save the initial "change password" command string. Simply enter your new password only once (**example:** blue1234) and save your connection session.

	Action
4	Change the default directory to: **cd 'EDX.EBSB.**[xxx]**.FTP'** (replace [xxx] with your OCLC institution symbol) **Caution:** Always include the single quotation marks.

5	Identify the file you are retrieving. (If using UNIX commands, type **ls** to list the files.)
	
	Names of files posted by Batch Services use the format shown below, where:
	
	  xxx = OCLC institution symbol
	  "D" number = Date in the format YYMMDD
	  "R" number = Unique Order ID in the format Rnnnnnn (nnnnnn = system-assigned
	      number)
	
	• **Record files:**
	  EDX.EBSB.[xxx].records.D[YYMMDD].R[nnnnnn]
	
	• **Statistics files:**
	  EDX.EBSB.[xxx].stats
	  EDX.EBSB.[xxx].stats(R[nnnnnn])

6	Verify that your transfer type is set to binary (**bin**).
7	Enter **get** [filename].
8	Click **Quit**.

See Retrieving Files from OCLC (GET)) in the EDX User Guide for more information.

7.1.3 Availability of reports and records

Report and record files are available via PSWeb and EDX for at least 90 days from the day they are posted. After 90 days, contact OCLC at support@oclc.org.

You may pick up files any time, except for maintenance time on Sundays, from 2:00 a.m. to 6:00 a.m. U.S. Eastern Time.

7.2 Summary of batchload report and record files

The following table describes report and record files that may result from your project.

D in file names represents the date the file or project completed processing (*yymmdd*)
R in file names represents an internal OCLC tracking number called the order ID

Title	Format of file name	Example
Report files		
File Processing Summary Report • Provides statistics on results of processing a file in a batchload project. • Produced for each file completed in a project.	D[*date processed*].R[*order number*].FILESUM.HTML	D100422.R27663.FILESUM.HTML
Project Processing Summary Report • Provides statistics on final results of processing the complete project. • Produced when a project is completed.	D[*date processed*].R[*order number*].PROJSUM.HTML	D100424.R27676.PROJSUM.HTML
Validation Errors Report* • Shows all validation errors for all records, whether minor or major. • Produced when a project is completed, if unadded records remain.	D[*date processed*].R[*order number*].UDEV*	D100424.R27663.UDEV*
Exception Report • Shows the library's local system control numbers (from field 001) of records not added. • Produced when a project is completed, if unadded records remain.	D[*date processed*].R[*order number*].EXCPRPT	D100424.R27663.EXCPRPT
Cross Reference Report • Shows matching OCLC control numbers across from your library's local system control number (from field 001). • Produced for each completed file in a project.	D[*date processed*].R[*order number*].XREF	D100424.R27663.XREF

Title	Format of file name	Example
Custom Cross Reference Report • Shows the same as the Cross Reference Report except that a third column containing numeric data from a single subfield in one of the following fields: 001, 019, 020, 022, or 082 • This report is available only by special request **before** you send your data to be processed. • Produced for each completed file in a project.	D[*date processed*].R[*order number*].CXREF	D100424.R27663.CXREF
Exception data record files • Exception data files may be produced when a project is completed if exception data remains. Exception data = records that could not be matched or added and so remain unprocessed for various reasons. • See details in 6, "Exception Data (Records Remaining)."		
Character set problem file	D[*date processed*].R[*order number*].UTF8.UTFER	R27663.UTF8.UTFER
Data integrity error file	D[*date processed*].R[*order number*].REJ	D100424.R27663.REJ
Duplicate record file	D[*date processed*].R[*order number*].DUP	D100424.R27663.DUP
Deselected record file	D[*date processed*].R[*order number*].DESL	D100424.R27663.DESL
Unresolved record file	D[*date processed*].R[*order number*].UNRES	D100424.R27663.UNRES
Output record files (produced only if requested in user's order)		
OCLC-MARC record output file	D[*date processed*].R[*order number*]	D100424.R27663
Own records returned file	D[*date processed*].R[*order number*]	D100424.R27663

*Note on the Detailed Error Validation Report: The system creates a report on all validation errors found in unresolved records (those in the .UNRES file). The Detailed Error Validation Report (.UDEV) is a text file showing minor and major validation errors, record-by-record. For a detailed explanation of processing validation errors, see Appendix D, "Validation."

7.3   Examples of reports

In Progress. Batchload reports are being re-designed. Examples of newly designed reports will be added here as they are implemented. See examples of existing reports in appendix D.

File Processing Summary Report | [more to be added]

OCLC Bibliographic Batchload File Processing Summary Report

Report Date: 06/17/2010   **Institution Name:**   OCLC Test 5

Run Date: 2010-06-17   **Institution Symbol:**   ZOY

Project ID: 013296   **Batch Specialist:**   BRADLEY WATSON

Key to Report   **Email:**   babichh@oclc.org

Toggle Labels

Order ID	Original File Name	New File Name
R502020		DBS.TEST.@ZOY.MARCIN.D100222.U062

Order ID:	R502020
File Submittal	
Label Count	500
Data Rejected	0
Total Records to New File:	500
File Conversion	
Records Received	500
Rejected, Character Set Problems	0
Total Records Sent to Preprocessing:	500
Preprocessing	
Records from File Conversion (or Unres)	500
Rejected, Data Integrity Errors	0
Rejected, Duplicate of Other Record in File	0
Rejected, Deselected by Preprocessing	0
Total Records Sent to Batch Processing:	500

Batch Processing

Total Records Received from Preprocessing	500
Records Matched	1
Records Added	497
Records Unresolved	2
Total Records Processed:	500

Action Taken on WorldCat Records

Holdings Set	498
Holdings Canceled	0
Records Used to Replace WorldCat Records	0
Records Used to Merge Data to WorldCat Recs	0

For a description of the data in Batchload Summary Reports, see the Key to Bibliographic Batchload Processing Summary Reports.