



# Order Checklist for LHRUS Batchload

Before you log on to the OCLC Online Service Center (OSC) to order a batchload project for the Local Holdings Record Updating service (LHRUS), use this checklist to write down information for the order form. If you print the checklist, you may also want to keep this electronic PDF version open to click links throughout to supporting information.

You may need 15-25 minutes for the checklist.

**Please note:** Some order form questions dynamically open additional questions, depending on your selections and entries. Below is a simple list of the topmost questions. Click a link to see details for a specific question.

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| <ul style="list-style-type: none"><li>• <a href="#">Identify the format of the data you are submitting for this project.</a></li><li>• <a href="#">Is this project associated with a single institution or a group?</a></li><li>• <a href="#">Is this a one time or an ongoing project?</a></li><li>• <a href="#">Which OCLC product(s) will be supported by this project?</a></li><li>• <a href="#">Identify the vendor, system, and version of your local system.</a></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">How will you submit your records and who will submit them?</a></li><li>• <a href="#">Do you need a PSWeb-only authorization and password?</a></li><li>• <a href="#">How many records do you estimate will be in the project you send?</a></li><li>• <a href="#">Specify e-mail address(es) to notify or send reports on your project.</a></li><li>• <a href="#">Do you have any special instructions for this project?</a></li></ul> |
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## Information for logging on to the Online Service Center for ordering

- Do you have an Online Service Center (OSC) account? If so, log on using your:  
OCLC institution symbol: \_\_\_\_\_  
Online Service Center user ID: \_\_\_\_\_  
Online Service Center password: \_\_\_\_\_
  - If you do not have an OSC account, it is easy to create an account from the [OSC Welcome page](#).
- Notes:**
- If you log on but cannot access the order form, contact OCLC at: [support@oclc.org](mailto:support@oclc.org).
  - Terms and Conditions: Accepting OCLC Batchload Terms and Conditions is required when you place an order. Click [here](#) to preview the Terms and Conditions.

Questions for completing the LHRUS Batchload Order form

Identify the format of the data you are submitting for this project.

**Caution:** Regardless of data format, each holdings record must have a properly formatted OCLC number for the associated bibliographic record in a consistent, discernible location.

- MFHD (MARC-21 Format for Holdings Data)

What is the character encoding in your records?

- MARC-8
- UTF-8 Unicode

You can select UTF-8 Unicode only if your records have the value **a** in Leader 09.

Specify the location in your holdings records of the OCLC number for the associated bibliographic record:

- 004
- 014 \$a
- 035 \$a

Other: Field \_\_\_\_\_ Subfield \_\_\_\_\_

- Non-MARC

Specify the format of your data:

- Spreadsheet
- Delimited text
- Labeled data

Other \_\_\_\_\_

Is this project associated with a single institution or a group?

- Single institution
- Group

If project is for a group, you must provide an OCLC institution symbol for billing and a complete list of OCLC symbols for libraries in your group:

What is the OCLC institution symbol for billing? \_\_\_\_\_

Enter OCLC institution symbols of libraries in your group (up to 500 symbols separated by commas, spaces, or semicolons):

To look up OCLC institution symbols, click this link to open [Find an OCLC library](#).

Is this a one time or an ongoing project?

- One time
- Ongoing

If ongoing, and you are sending patterned non-MARC-formatted data, how often will you send data?

- Quarterly
- Semi-annually
- Annually
- Indeterminate

**Which OCLC product(s) will be supported by this project?**

Web-scale Management Services

WorldCat Local

OCLC Group Catalog

If OCLC Group Catalog, name of group \_\_\_\_\_

Project not for specific OCLC product(s)

**Note:** If you are implementing [Navigator](#), select WorldCat Local or Group Catalog, depending on your contract.

**Identify the vendor, system, and version of your local system?**

Name \_\_\_\_\_ System \_\_\_\_\_ Version \_\_\_\_\_

**How will you submit your records and who will submit them?**

**Caution: Do not send your data until you receive a project ID number in your order confirmation email from OCLC Batch Services.**

- Choose one of the following options for sending MARC holdings records:

FTP to EDX account

Submittal contact e-mail \_\_\_\_\_

See [instructions for transferring records via FTP](#).

If you do not have an EDX account, when you order and select this option, an account is created for you automatically.

FTP by a third party

Third-party contact name \_\_\_\_\_

Third-party contact email address \_\_\_\_\_

Upload to the OCLC Product Services Web (PSWeb)

Access PSWeb at <http://psw.oclc.org>.

See [instructions for uploading records to PSWeb](#).

- Choose this option only for sending non-MARC patterned data:

Send as an email attachment

If you send non-MARC patterned data, you must select this method. If you send MARC data, this option is unavailable.

Send non-MARC patterned data in file(s) attached to an email (do not send data in the body of the email). Send the email to: [Batchloadusers@oclc.org](mailto:Batchloadusers@oclc.org).

Patterned data may be sent as spreadsheets, delimited text, labeled data, or a discernible combination of these.

**Do you need a PSWeb-only authorization and password?**

Select this check box only if you do not already have an authorization that will also work for PSWeb. You can use your authorization for OCLC cataloging, FirstSearch (with an administrative or statistics password), or resource sharing authorization, if you have one of these, to log on to PSWeb.

If you request an authorization, please enter a password.

Preferred password \_\_\_\_\_

**Guidelines for password:**

- Use uppercase letters A-Z, digits 0-9, and characters #, @, and %.
- Use a letter or digit as the first character.

**How many records do you estimate will be in the project you send?**

\_\_\_\_\_

**Note:** If you are ordering an ongoing project, please estimate the number of records in your **initial** record load.

**Specify e-mail address(es) to notify or send reports on your project.**

Email(s) to receive Batch Processing Summary Reports for each file processed:

\_\_\_\_\_

Email(s) to notify if a Detailed Exception Report is posted to PSWeb if files contain unprocessed records:

\_\_\_\_\_

**Do you have any special instructions for this project?**

[Enter free text]

(Maximum size = 500 characters. Please note that the order form will report the number of characters dynamically as you enter them.)

**Support**

If you have questions, please contact OCLC Customer Support at [support@oclc.org](mailto:support@oclc.org).