



Send Bibliographic Records for Batchload Using Your Innovative (III) Local System

When to send your data

As soon as you order a batchload project for **bibliographic records** and you receive a confirmation email 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 sending your records using an OCLC EDX account created for an OCLC institution symbol other than the OCLC symbol you used to order your batchload project.

Three-step process

To transfer your bibliographic records via your Innovative Interfaces local system to your OCLC Electronic Data Exchange (EDX) account, follow these general steps:

| | |
|--------|--|
| Step 1 | In Innovative, create DATA file(s) containing your records and a corresponding LABEL file with required information about the DATA file. |
| Step 2 | Send the DATA file(s) to your OCLC EDX account. |
| Step 3 | Send the corresponding LABEL file(s) to your OCLC EDX account. |

What you need: OCLC EDX account (when you ordered, the system checked and created an EDX account for you if you did not already have one).

Caution:

(1) These instructions are a composite provided by Innovative users who have transferred their bibliographic records to their OCLC EDX account for batchload. OCLC is not affiliated with providers of any local systems, including Innovative Interfaces, and therefore cannot provide definitive information for Innovative local systems.

(2) These instructions may not apply to various versions of Innovative systems that work differently.

(3) Please read instructions before proceeding, especially those for file naming and for creating LABEL files. Inaccurate data, file naming, or LABEL file content can delay record processing and project completion.

Step 1. Create the file(s) in Innovative

1. In your Innovative system, select the following process: **Output MARC records to another system using FTS.**
2. Click the **Create O** icon.
3. Select the function: **CREATE file of BIB records with OCLC label file.**
4. Name the output file using the following format: Type **DATA.D** followed by the current date in the format *yymmdd*.

Example: DATA.D090328

If you submit multiple 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 that, for bibliographic projects, 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.

5. Change **Range** to **Review**.
6. Locate the review file.
7. In **Originated system ID**, enter your OCLC institution symbol.
8. Enter the project ID assigned to your batch project (“P” number).
9. Close the **File Conversion Report** box.

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.

OCLC highly recommends that you send 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. Send the DATA file(s) to OCLC

1. In your Innovative system, click to select the DATA file.
2. Click the **Put FTS S** icon.
3. Enter the **Host** address **edx.oclc.org**.
4. Click **Connect**.
5. Enter your user name in this format:
t/[xxx]1
(Replace [xxx] with your OCLC institution symbol and enter a 1, the number one, not the letter "ell.")
Example: tocl1
6. Enter your password:
 - The first time you use your account, you must change the existing password, which is the same as your user name. At the password prompt, enter your initial password and your new password twice, separating each password with a slash: *[initial password]/[new password]/[newpassword]*.
Note: The new password must be eight characters (A-Z, #, \$, or @) and must include at least one number. **Example: blue1234**
 - Click **OK**.
The screen that opens shows that you are connected to the OCLC server.
7. In the **Remote filename** box, enter **'edx.ebsb.[xxx].ftp'** (replace [xxx] with your OCLC institution symbol in lowercase).
Note: Always include the single quotation marks.
8. Click the **Remote filename** button.
9. **Required.** Click to select the **Rename file upon transfer** box.

10. In **Transfer type**, select **Binary**.
11. Click to select the DATA file, and then click **Put**.
12. Change the **Remote filename** to the name you gave the file when you created it.
Examples:
DATA.D090328.FILE1,
DATA.D090328.FILE2 (project with multiple files)
Or
DATA.D090328.LAST (last or only file in a one time project)
Note: You are removing the **.out** extension from the displayed file name.
13. Click **OK**.

Step 3. Send the LABEL file(s) to OCLC

Send each LABEL file immediately after sending its related DATA file.

1. In your Innovative system, click to select the LABEL file corresponding to the DATA file you just sent.
2. Click the **Put FTS E** icon.
3. Click **Put**.
4. Change the **Remote filename**.
Examples:
LABEL.D090328.FILE1
Or
LABEL.D090328.LAST
Note: You are removing the **.txt** extension from the displayed file name.
5. Click **OK**.

Results of sending files: 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 email notification that OCLC received your file. If you do not receive the email, contact OCLC Batch Services at batchload@oclc.org to investigate.

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 with creating or sending your files or with using your EDX account.

If you need help with your Innovative local system, please contact Innovative Interfaces support.