

Summary of Project Stages

Introduction

This is a summary of the stages of an OCLC Local Holdings Record Updating project. It also provides an overview of the evaluations and reports you may receive from OCLC.

Summary: Project stages

Stage	Who	Does What
1	Library	Contacts OCLC regional service provider to discuss starting an OCLC LHR Updating service project.
2	Library	Completes and submits a LHR Updating order form , including specifications and LHR scan/delete processing request, if needed.
3	Regional service provider	Approves the order form and forwards it to OCLC Batch Services.
4	OCLC	Contacts the institution with a Project ID and file transfer instructions.
5	Library	Sends an initial file of data to OCLC for evaluation.
6	OCLC	Evaluates the file. Note: If there are problems with the data, you may need to resubmit the file.
7	OCLC and the library	Discuss the results of the file evaluation and resolve any questions. When all issues are resolved, OCLC produces an <i>LHR Updating Batchload Project Definition</i> and sends it to you for approval. Note: As part of the project definition, OCLC produces a Holdings Translation Table that lists library identification codes from field 852 subfields ‡a and ‡b of your holdings records. You and OCLC work together to match your local codes with the appropriate OCLC institution symbol and holding library code combinations. Only valid OCLC institution symbols and holding library codes are used in subfields ‡a and ‡b respectively of the 852 field in WorldCat local holdings records.
8	Library	Approves the <i>LHR Updating Batchload Project Definition</i> and <i>Holdings Translation Table</i> , and informs OCLC and your OCLC regional service provider of approval. Note: If you submitted an evaluation file initially, you must now submit live data. For ongoing projects, a schedule is set for file submission and processing during the project definition stage.
9	OCLC	Processes your file and loads the local holdings records into WorldCat®.
10	OCLC	Posts your <i>Batch Processing Summary Report</i> and <i>Detailed Exception Report</i> (if there are errors that prevent the records from loading) on the OCLC Product Services Web site . Note: On Product Services Web the reports are found under Batch Services Records and Reports.
11	Library	If the parameters of your project change, you must notify OCLC Batch Services before your next batch update file can be processed.

Evaluations and Reports

Introduction

This section is an overview of the evaluations and reports you may receive from OCLC.

Evaluation of records

After you submit a file, OCLC evaluates it to determine specific processing specifications for the records. When the evaluation phase is complete, OCLC provides you and your regional service provider with an *LHR Updating Batchload Project Definition*. This document defines the parameters and specifications of the project. You and OCLC must agree to the *LHR Updating Batchload Project Definition* prior to processing.

The *LHR Updating Batchload Project Definition* has three parts:

- **Project Information** – Contains brief project identification and contact information.
- **Processing Information** – OCLC development staff use this information to create the customized setup through which your records will be processed.
- **Notes/Comments** – This section contains more specific information about the data.

Included with the definition will be a *Holdings Translation Table*. This is in spreadsheet format and each column represents the following information:

Column A: Location code present in the 852 ‡a of the input file

Column B: Sublocation or Collection code present in the 852 ‡b of the input file

Column C: Valid 4-character OCLC-profiled holding library code that will appear in 852 ‡b of the WorldCat local holdings record.

Column D: OCLC institution symbol that will appear in 852 ‡a of the WorldCat local holdings record.

You and OCLC work together to match your local codes with the appropriate OCLC-profiled holding library codes for your institution. If changes are needed to Holding library codes, you work with your regional service provider to request profiling changes.

The holding library codes appear in the 852 ‡b of the WorldCat local holdings record. If your project is ongoing, you must notify OCLC before submitting any records with new location codes so that the *Holdings Translation Table* can be updated prior to processing.

Note: A change in local systems requires a new evaluation and customized setup for processing. Contact your [regional service provider](#) for pricing information.

Evaluations and Reports (continued)

Post-processing report After a file is processed and local holdings records are loaded into WorldCat, OCLC produces the *Batch Processing Summary Report* and *Detailed Exception Report* to aid in record maintenance:

Post-processing Report	Description
Batch Processing Summary Report	Provides summary details about actions performed on records, including LHRs added, replaced, or deleted.
Detailed Exception Report	Lists records not successfully processed. Records may be on the list for many reasons, including: <ul style="list-style-type: none">• No OCLC Control Number• Multiple 852 fields• Invalid subfield ‡8

The *Batch Processing Summary Report* is sent to you and is available on the [OCLC Product Services Web site](#) when file processing is complete. LHR reports can be found under Batch Services Records and Reports.

The *Detailed Exception Report* is available only on the [OCLC Product Services Web site](#) under Batch Services Records and Reports.