

1 What Is Batchload?

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1.1 What is Batchload?

Batchload is an automated offline service that OCLC uses to process large amounts of library records in various data formats to synchronize library holdings with WorldCat by:

- Setting and/or canceling holdings on WorldCat records
- Adding original cataloging records to WorldCat
- Providing OCLC numbers for your local system records
- Providing copies of OCLC-MARC records that match the records you send for loading into your local system

1.2 Why use Batchload?

Batchload integrates your library's holdings in WorldCat to accurately reflect your collection and make it visible to your patrons, other libraries, and users of the Web through such OCLC services as:

- Web-scale Management Services
- WorldCat Local
- WorldCat.org
- Group Catalog
- Navigator
- Collection Analysis
- Resource Sharing
- Cataloging

1.3 Basic workflow

To use Batchload, you order the type(s) of bibliographic batchload project(s) you need. In the order, you also request the output you need from your project and provide OCLC with information about the characteristics of your library's records. See [chapter 2](#) "Select a Batchload Project Type and Output" and [chapter 3](#) "Order a Batchload Project" for details. Batchload uses MARC-formatted records for processing but can also convert other types of data from your library, as described in chapter 2 for the various project types.

This Guide covers details of the following basic steps in a typical Batchload workflow:

1	Library. Selects the type(s) of project(s) and output needed.
2	Library. Completes and submits a batchload order for each project type.
3	OCLC. Sends the library an order confirmation with a unique batchload project ID and a link to instructions for submitting your records/data.
4	Library. Extracts and sends local system records/data to OCLC for processing.
5	OCLC. Matches the library's records against WorldCat to set or cancel holdings* in records that match and to add your unmatched records that meet quality standards to WorldCat as original cataloging, if requested in your order.
6	OCLC. Provides reports and records to help index consistently formatted OCLC control numbers in your local system or to upgrade your library's records. Provides statistical reports on processing results.
7	Library. Keeps holdings current in WorldCat using ongoing batchload project(s) or using OCLC cataloging services.

* **Definition of set or cancel holdings** – Batchload sets (adds) or cancels (deletes) your library's OCLC institution symbol in matching WorldCat records to indicate items that your library holds or no longer holds, respectively. When your library's holdings are up-to-date in WorldCat, users see an accurate reflection of your collection in Web-scale Management Services, WorldCat Local, and other discovery and resource sharing services listed above in [1.2](#).

1.4 Who is eligible for Batchload?

You are eligible for Batchload services if you:

- Are an OCLC member and have an OCLC cataloging subscription
- Have a Group services contract that authorizes you to do batchload

1.5 What is in this Guide?

The purpose of this guide is to provide the information you need to use Batchload to your library's best advantage. The main sections cover the sample typical workflow described above:

- How to choose a project and output
- How to order a project
- How to send your records/data for processing
- How OCLC processes records
- Why some records remain (called "exception data") and what happens to them
- What kind of report and record files may result from batchload projects

Appendixes include detailed technical information about matching or merging records in WorldCat, validating records for batchload, and more.

Notes:

- **Batchloading for local holdings records is not covered in this Guide.** This Guide covers only Batchload for bibliographic records. For information about batchloading local holdings records, see the [Local Holdings Record Updating Service Guide](#).
 - **“Batchload” is not the same as “batch processing” in Connexion client.** “Batchload” is the name of the service that OCLC performs for libraries. “Batch processing” in the Connexion client is a function that libraries can use themselves to process multiple records at a time using the “Batch” menu commands. See more about [Connexion client batch processing](#) in Connexion client documentation.
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1.6 More information

- See a condensed version of this Guide in the [Batchload Solutions for Bibliographic Records Quick Reference](#).
- See all [Batchload documentation](#).