

OCLC Batchloading Defined

Batchloading is an automated, offline method of matching files of records against the records in WorldCat. Batchloading is not the batch processing you do in Connexion or in your local system. In batchloading, libraries send files of records from their local systems to OCLC. Batchload software then takes each record and looks for a matching record in WorldCat, using matching algorithms. If a matching record is found, holdings are set or canceled (by adding or deleting the library's OCLC institution symbol). If a local system record has no match, it is added to WorldCat (if it meets quality and completeness standards). After batchloading, a library's records (or holdings) are said to be synchronized with WorldCat. In other words, WorldCat records now contain the holdings information for your library's materials.

The library may also choose to receive:

- Reports that explain the results of batchloading
- OCLCMARC output. The file of matching MARC records (optionally, local data can be retained)
- Its records returned with matching OCLC numbers inserted

Here is a general overview of how batchload projects often proceed.

1. Library fills out batchload order form
2. Batch Services issues project ID
3. Library sends file of records to OCLC
4. Batch Services and library consult about project (if needed)
5. Processing options and preprocessing routines are established
6. Processing (includes matching, adding, etc.)
7. Reports (and records if requested) sent to library

OCLC can also provide symbol maintenance for libraries. Symbol maintenance processes are not technically batch projects because they do not involve loading records into WorldCat. Instead, they involve taking actions on symbols attached to records that are already in WorldCat.

For more information on beginning or renewal projects and for cost quotes for these services see [all batch processing documentation](#) and contact OCLC Consultative Services at consult-svcs@oclc.org.