

Batch Processing with Connexion

Some processes can be done in batches using OCLC's Connexion Client software. We would use this most frequently to add or remove our holdings to records in OCLC.

1. Before you begin to make a list of new OCLC records through the batch process, you will want to clear out the **Connexion Local Save File**:
 - Open the Connexion software, but do not need to be logged in.
 - Go to the **Cataloging** header and **Search Local Save File**.
 - Click the **“OK”** button to display all records that are still in the save file.
 - Highlight all of the records to be deleted. Go to the **Action menu** and select **Delete Record** or click on the **Delete Record icon**.
2. To create a batch file of OCLC records:
 - Open the Connexion software, but do not log in.
 - Go to the **Batch** menu and choose **Enter Bibliographic Search Keys**.
 - Note name of the file you are working in (likely either DefaultBib.bib.db or WithdrawBib.bib.db)
 - Type in **#** and the OCLC number/WorldCat accession number to be retrieved and click the **Add** button or press **Enter**. Do this for each record to be retrieved.
 - When you are done entering OCLC numbers, click the **Save** button and then the **Close** button.
 - Go to the **Batch** menu and choose **Process Batch**.
 - Click on the **file name** (e.g. DefaultBib.bib.db or WithdrawBib.bib.db) and on **Process Online Searches**, then on the **OK** button.
 - Allow time for the batch to process.
 - A report on the batch process should appear. This report may be printed.
3. To modify a batch of records to update or remove holdings:
 - Log in to / connect to Connexion.
 - Go to the **Cataloging** header and **Search Local Save File**.
 - Click the **“OK”** button to display all records that are still in the save file.
 - Highlight all of the records to be receive the action.
 - Go to the Action menu and chose **Update Holdings** or **Delete Holdings** (or select the corresponding icons) as appropriate
 - Allow time for the batch to process.
 - When the action is completed on each record, a **“c”** for 'completed' will appear in the appropriate column.

- When all actions are completed, follow no. 1 above to delete the records from the **Local Save File**.
4. For more information on batch files and batch processing using OCLC's Connexion Client software see documentation at the OCLC web site at <http://www.oclc.org/support/documentation/connexion/client/default.htm>.

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