



 ESTC
MATCHING/REPORTING
INSTRUCTIONS

THE ART OF MATCHING

An Overview

The ESTC is a world-wide community of librarians, scholars, researchers, students, and book lovers dedicated to preserving our print heritage. We are eager for you to add your holdings of in-scope material through this matching process. We are even more eager to receive reports from you for items new to the ESTC.

Matching is the process of comparing what you have in hand to what is already catalogued in the ESTC. Usually your copy will match exactly, but sometimes it won't. If you can't find a record that matches your item, you will report it as a 'Not Found' and the ESTC will have a new record.

ESTC SCOPE

- ⌘ All letterpress items printed in any language in Great Britain or any territories it has ever governed, or bearing an imprint as such, before 1800.
- ⌘ Any letterpress item printed in English anywhere else in the world between 1473 and 1800.
- ⌘ When in doubt, ask questions or send a report



ESTC SCOPE

- ✎ **All items cited in Wing and STC**
- ✎ Monographs with all engraved text and atlases
- ✎ Other engraved items, such as maps, with substantial letterpress text
- ✎ When in doubt , ask questions or send a report



ESTC OUT-OF-SCOPE MATERIAL

All items cited in Wing and STC are within the scope of the ESTC

- ∞ Anything printed in 1801 or later
- ∞ Engraved maps, scores, music, illustrations, etc. *with no letterpress text*
- ∞ Items **not** published in English **and** published outside of Great Britain and its territories
- ∞ Manuscript items
- ∞ Photostat/Photocopy/Facsimile reproductions

WHEN IN DOUBT, ASK QUESTIONS (estc-catalog@cbsr.ucr.edu)
or SEND A REPORT (estc-reports@cbsr.ucr.edu)

ESTC OUT-OF-SCOPE MATERIAL

All items cited in Wing and STC are within the scope of the ESTC

- ∞ Microfilm
- ∞ Electronic versions
- ∞ Other media forms
- ∞ Concert and theatre programmes
- ∞ Playing cards, games, puzzles
- ∞ Labels, tickets, visiting cards, invitations, bookplates, currency

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or SEND A REPORT (estc-reports@cbsr.ucr.edu)

WHERE TO BEGIN?

- ☞ You will need a matching account to begin working in the ESTC
- ☞ Contact the CBSR for a user name and password:

estc-technical@cbsr.ucr.edu

LOGGING IN TO THE ESTC

Start out at our home page:

<http://www.cbsr.ucr.edu>

Click on the Post-boy

Choose: *Contributing to the ESTC*

Choose: *Web matching*

You have arrived at the log in page

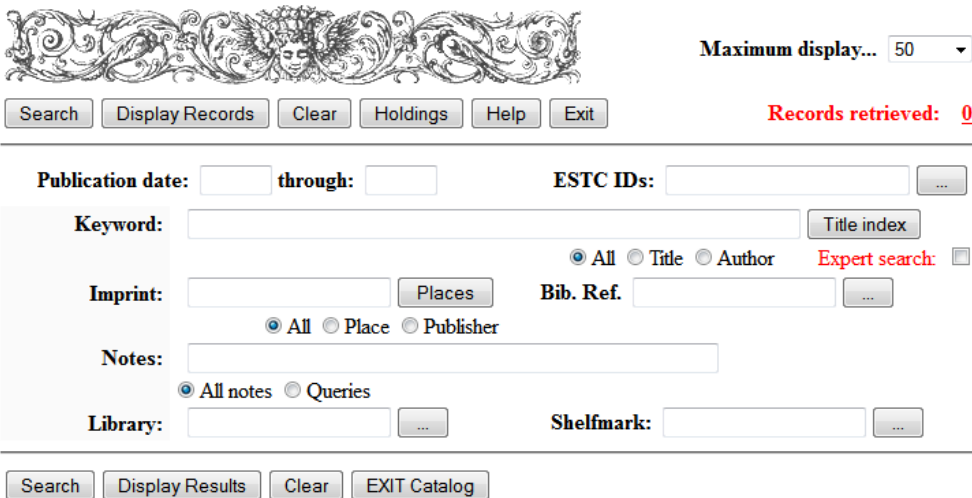
Direct access to the log in page is:

<http://estc.ucr.edu/EstcPassword.html>



LOGGING IN TO THE ESTC

- Once you enter your user name/password **and** click the **OK** button, the ESTC search page will open up in your browser.



The screenshot shows the ESTC search interface. At the top, there is a decorative scrollwork border. To the right of the border is a dropdown menu labeled "Maximum display..." with the value "50". Below the border is a row of buttons: "Search", "Display Records", "Clear", "Holdings", "Help", and "Exit". To the right of these buttons is the text "Records retrieved: 0". Below this row is a search form with several fields and buttons. The fields include "Publication date:" with a "through:" field, "ESTC IDs:", "Keyword:", "Imprint:", "Notes:", and "Library:". There are also buttons for "Title index", "Places", "Bib. Ref.", and "Shelfmark:". The form includes radio buttons for "All", "Title", "Author", "All notes", "Place", "Publisher", and "Queries". At the bottom of the form is a row of buttons: "Search", "Display Results", "Clear", and "EXIT Catalog". Below the form is a horizontal line, and at the bottom of the page are three links: "Search Wing Catalog", "Search STC Catalog", and "Search the Library of Congress Authority file".

Maximum display... 50

Search Display Records Clear Holdings Help Exit Records retrieved: 0

Publication date: through: ESTC IDs: Title index

Keyword: All Title Author Expert search: ☐

Imprint: Places Bib. Ref. All Place Publisher

Notes: All notes Queries

Library: Shelfmark:

Search Display Results Clear EXIT Catalog

[Search Wing Catalog](#)
[Search STC Catalog](#)
[Search the Library of Congress Authority file](#)

- Note that STC and Wing are now searchable database links at bottom of page.

THERE ARE MANY WAYS TO SEARCH THE ESTC

∞ Keyword field

∞ You may choose any word from the title of the item but choose wisely, for very common words such as 'England', 'London', 'Parliament', 'Charles', etc. will yield an astounding number of results.

∞ ***TIP*** Use the radio buttons to further refine your keyword search.

∞ E.g. Keyword: "Shakespeare"

∞ radio button "title" = 693 hits

∞ radio button "all" = 1669 hits

∞ radio button "author" = 1267 hits



http://estc.ucr.edu/starhelp/basic_search.html

THERE ARE MANY WAYS TO SEARCH THE ESTC

∞ ESTC ID field

Example: W474561, R038052, S117523, T165225, N478257, P469172

- ∞ ***TIP*** To compare records, string ESTC IDs together with a backslash (spaces do not affect the search):

W13977 \ W37809 \ T165225 etc.

∞ Bib. Ref. field

- ∞ Use for searching by Wing, STC, Evans, etc. numbers

- ∞ ***TIP*** To compare records, string Bib. Ref. searches this way:
B2373 \ B2372B

http://estc.ucr.edu/starhelp/basic_search.html

SEARCHING THE ESTC

Imprint Field

- ∞ Place of publication (MARC field 260 \$a)
Such as: London, Edinburgh, Dublin, Boston, Philadelphia
- ∞ Printer/Publisher area (MARC field 260 \$b)
Search by the last name (i.e. surname) only of the printer or publisher
- ∞ Date of Publication (MARC field 260 \$c)
The Publication Date Field is at the top of the search screen
 - ∞ Search by single date: e.g. 1678
 - ∞ Search by a range of dates: e.g. 1678 through 1701

COMBINING SEARCHES

To narrow the number of results retrieved, combine your search terms

For instance:

- ∞ Search the keyword field by *title word* and the imprint field by *printer's last name (i.e. surname)*
- ∞ Search the keyword field by *author's name* and the imprint field by *publisher's last name (i.e. surname)*
- ∞ Search the keyword field by *title word* and the imprint field by *place of publication* and publication date field by *date of publication*
- ***Tip*** Make searching by date your final search for an item -- not your first

COMBINING SEARCHES

- For example: I searched keyword '**coffee**' and imprint word '**tonson**' and retrieved 6 records

English STC (1475-1800) Maximum display... 50

[Search](#) [Display Records](#) [Clear](#) [Holdings search](#) [Help](#) [Browse indexes](#) [Exit](#) Records retrieved: 6

Publication date: through: ESTC IDs:

Keyword:

☐ All ☐ Title ☐ Author ☐ Publisher ☐ All notes ☐ Queries

Library:

[Clear](#) [Search](#) [Display Results](#) [EXIT Catalog](#)

keyword **imprint** **Records retrieved**

Here are the results of the keyword search 'coffee' and imprint word 'tonson':

Brief Records (Table Report)

RLIN	Year	Item	Select	Full Record
T31281	1709	Jonson, Ben. The alchemist; a comedy. As it is now acted at the Theatre-Royal, by Her Majesty's servants. Written by Ben. Johnson. London : printed for Jacob <<<Tonson>>> : and sold by William Lewis at the Dilphin next Tom's- <<<Coffee>>>-House in Russel-Street, Covent-Garden, 1709.	☐	Full
T221096	1709	Late last night the following account was. [Dublin : Printed by J. <<<Tonson>>>, at Grays-Inn Gate. 1709. Re-printed by Francis Dickson at the Union <<<Coffee>>>-house on Cork-Hill, 1709].	☐	Full
N70524	1724	Additional instructions for officers who survey. London : printed by J. <<<Tonson>>>, 1724.	☐	Full
N47495	1724	Great Britain. Commissioners of Excise. Instructions for officers in the country, who. London : printed by J. <<<Tonson>>>, 1724.	☐	Full
T483290	1724	Great Britain. Commissioners of Excise. Instructions to be observed by the officers. London : printed by J. <<<Tonson>>>, 1724.	☐	Full
N54090	1724	Great Britain. Customs Establishment. Instructions for officers in the country. London : printed by J. <<<Tonson>>>, 1724.	☐	Full

COMBINING SEARCHES

Now that I have my results, I can enter the date '1724' in the publication date field and narrow my results to 4 records

English SEC (1475-1800) Maximum display... 50

[Search](#) [Display Records](#) [date](#) [Holdings search](#) [Help](#) [Browse indexes](#) [Exit](#) Records retrieved: 4

Publication date: 1724 through: ESTC IDs:

[keyword](#) [Title](#)

Imprint: [Places](#) ☒ All ☐ Title ☐ Author ☐ [Bib. Ref.](#)

[imprint](#) ☒ All ☐ Publisher

Notes:

☒ All notes ☐ Queries

Library: [Shelfmark:](#)

[Clear](#) [Search](#) [Display Results](#) [EXIT Catalog](#)

[Records retrieved](#)

THE ART OF MATCHING

Web Matches

∞ Match to the ESTC record when your item corresponds exactly in the following ways:

- The title page matches; even the spelling, punctuation, typeface, spacing, etc.
- The edition is the same
- The imprint is the same
- The pagination is the same
- The format is the same

→ ***TIP*** Always read the General notes (500) for valuable information

WEB MATCHING

Cataloguer's Notes

Add a Cataloguer's Note in the **Annotate Record** field when discrepancies are found, such as:

⌘ Everything matches except for an apparent typo in the title or imprint

⌘ There is a break in the pagination not accounted for in the record

⌘ The book in hand has an additional preliminary or final leaf not acknowledged in the record

TIP Always read the General notes (500) for valuable information

Adding your holdings

☞ *You are now ready to add your holdings to the proper ESTC record.*

☞ *Click on the Add Holding button at the top of the record.*

☞ Enter your shelfmark/call number, copy specific notes, provenance and binding notes in fields 6, 7a, 7b.

☞ If there is a digital surrogate for the copy, enter the Collection Name, if applicable, and URL in appropriate fields.

☞ Click the radio button “**WEB match**” in field 5.

☞ *Click Update, then Close.*

☞ *You're done!*

Action requested: Create

Close Browse index DeleteRecord Update

1. ESTC ID S117057

2. Code nNc

3. Name North Carolina State Library

4. Place Raleigh, North Carolina, United States.

5. Status ☐ Primary ☐ Verified ☐ Unverified ☒ WEB match ☐ Catalog match ☐ Machine match (WEB m.

6. Shelfmark

7a. Copy note

7b. Provenance and binding

8. Serials seq

Digital Coll. Name

Digital Item URL

Deleting Your Holdings

⌘ We ask you to notify the ESTC staff if you find your item was matched to the wrong record.

⌘ Please do not delete holdings yourself ⌘

Contact: estc-catalog@cbsr.ucr.edu

WEB MATCHING

Don't Match

TIP Always read the General notes (500) for valuable information

Everything matches in the title, imprint, and pagination, **but** the general notes (500) do not describe the book in hand
(i.e. describes another edition or a variant)

Don't match. Send an image/report for a new record.

estc-reports@cbsr.ucr.edu

WEB MATCHING

Don't Match

TIP Always read the General notes (500) for valuable information

⌘ There is more than one record to which your copy could match. An additional general note (500) is needed to further differentiate the records.

⌘ **Don't match**. Add a Cataloguer's Note in the Annotate Record field in each record, then send us an email (estc-catalog@cbsr.ucr.edu) with the ID numbers of the affected records. We'll take it from there.

WHEN IN DOUBT, DON'T MATCH
ASK QUESTIONS:

estc-catalog@cbsr.ucr.edu

WEB MATCHING

Don't Match

TIP Always read the General notes (500) for valuable information

∞ Something looks weird ∞

Don't match.

Add a Cataloguer's Note in the Annotate Record field and send us an email with the ID number(s) so we can fix the problem or answer your question(s).

WHEN IN DOUBT, DON'T MATCH
ASK QUESTIONS:

estc-catalog@cbsr.ucr.edu

NEVER MATCH TO THESE RECORDS:

WE NEED MORE INFORMATION ABOUT THEM BEFORE CATALOGUING

- ✂ *Unedited Records*
- ✂ *Partial Records*
- ✂ *Place-holder Records*

Each of these records will have a 5xx note stating the type of record it is:

- ✂ 5xx Unedited record
- ✂ 5xx Place-holder record
- ✂ 5xx Partial record

http://estc.ucr.edu/starhelp/matching_criteria.html#contents

- ✂ **In each case, please send a report to our office and we will update the record.**

REPORTING A NEW ITEM

∞ Once you have determined you have a new item for the ESTC, go to our website for information on reporting and reporting options

∞ <http://estc.ucr.edu/starhelp/reporting.html>

∞ Reporting options:

Digital reporting

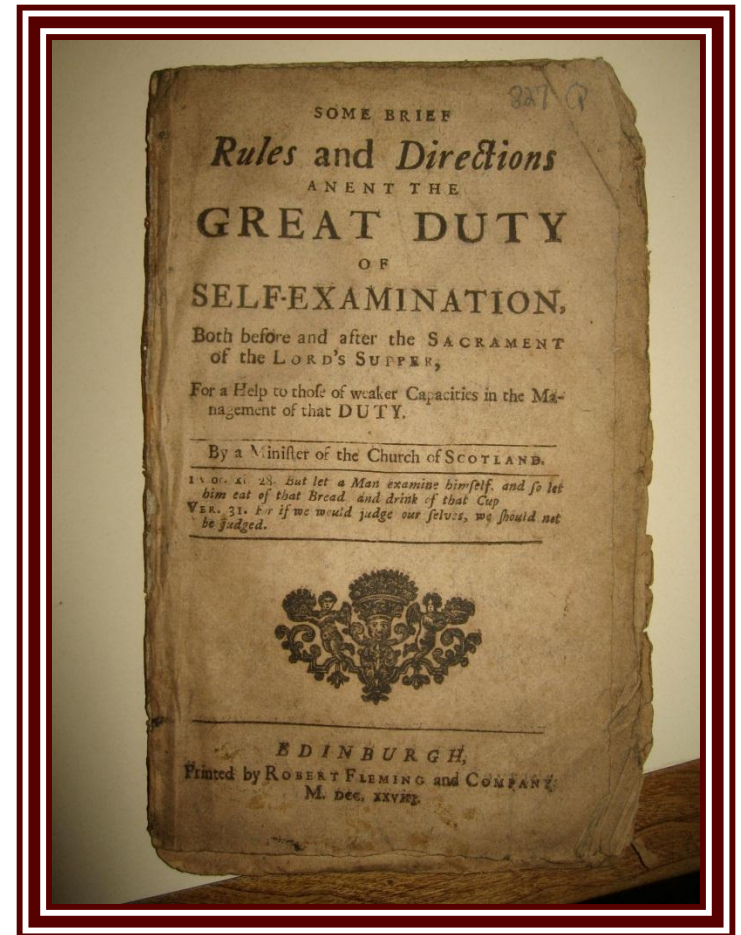
Paper reporting

OPAC or in-house electronic catalog



GETTING HELP

- ∞ For technical help contact:
estc-technical@cbsr.ucr.edu
- ∞ For cataloguing help contact:
estc-catalog@cbsr.ucr.edu
- ∞ CBSR website:
<http://cbsr.ucr.edu>
- ∞ Log In page:
<http://estc.ucr.edu/EstcPassword.html>
- ∞ ESTC Web matching Help
http://estc.ucr.edu/starhelp/help_main_menu.html



OTHER CONTACT INFORMATION

Mailing address:

Center for Bibliographical
Studies & Research

University of California
Highlander Hall, Room B114
1150 University Ave.
Riverside, California 92507
USA

Phone: (951) 827-5841

E-mail: cbsrinfo@ucr.edu

Fax: (951) 827-4120

Brian Geiger, Director

brian.geiger@ucr.edu

A FINAL NOTE

Thank you for your participation in creating and maintaining the ESTC.
Your efforts provide additional resources and information for scholars
throughout the world.



 The Sun never sets on the ESTC 