



 *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, 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, 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](mailto:estc-catalog@cbsr.ucr.edu))  
or SEND A REPORT ([estc-reports@cbsr.ucr.edu](mailto: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](mailto: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](mailto:estc-technical@cbsr.ucr.edu)**

# LOGGING IN TO THE ESTC

Start out at our home page:

<https://cbsrinfo.ucr.edu/>

Click the menu item “Current Projects”

Choose: *ESTC*

Choose: *Contribute*

You have arrived at the log in page

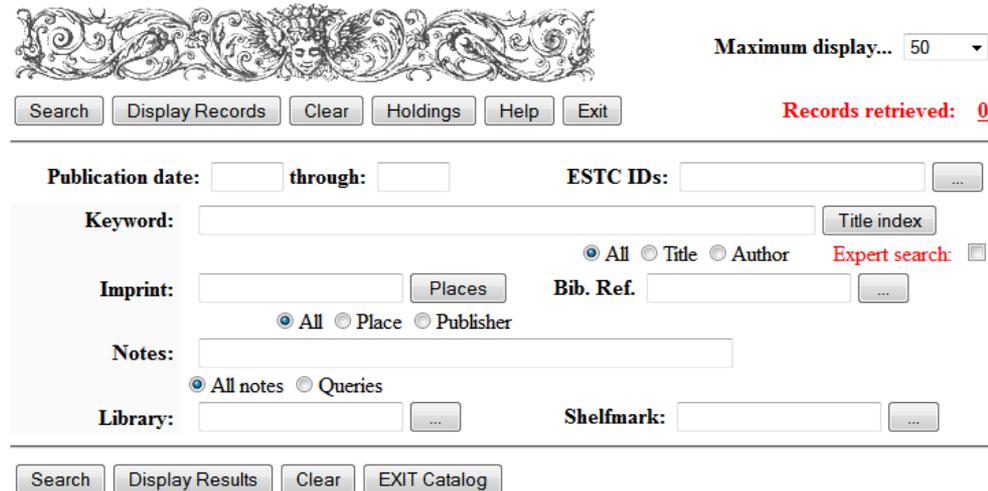
**Direct access to the log in page is:**

<https://cbsrinfo.ucr.edu/ESTC/contribute>



# 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 displays the ESTC search interface. At the top left is a decorative scrollwork border. To the right, there is a 'Maximum display...' dropdown menu set to '50'. Below this is a row of buttons: 'Search', 'Display Records', 'Clear', 'Holdings', 'Help', and 'Exit'. To the right of these buttons, it says 'Records retrieved: 0'. The main search area contains several fields and options: 'Publication date:' with a 'through:' field, 'ESTC IDs:' with a dropdown, 'Keyword:' with a 'Title index' button, 'Imprint:' with a 'Places' button, 'Notes:' with 'All notes' and 'Queries' radio buttons, and 'Library:' with a dropdown. There are also radio buttons for 'All', 'Title', and 'Author' under 'Expert search', and 'Bib. Ref.' with a dropdown. At the bottom, there are buttons for 'Search', 'Display Results', 'Clear', and '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



<https://cbsrinfo.ucr.edu/ESTC/contribute/estc-star-help>

# 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

<https://cbsrinfo.ucr.edu/ESTC/contribute/estc-star-help/star-basic-search>

# 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:  Records retrieved

Keyword: coffee    All  Title  Author Expert search:

tonson   All  Pl  Publisher Bib. Ref.

Notes:   All notes  Queries imprint

Library:   Shelfmark:

---

Clear Search Display Results EXIT Catalog

# 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	<b>Jonson, Ben.</b> 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.	<input type="checkbox"/>	<a href="#">Full</a>
T221096	1709	<b>Late last night the following account was.</b> [Dublin : Printed by J. <<<Tonson>>>, at Grays-Inn Gate. 1709. Re-printed by Francis Dickson at the Union <<<Coffee>>>-house on Cork-Hill, 1709].	<input type="checkbox"/>	<a href="#">Full</a>
N70524	1724	<b>Additional instructions for officers who survey.</b> London : printed by J. <<<Tonson>>>, 1724.	<input type="checkbox"/>	<a href="#">Full</a>
N47495	1724	<b>Great Britain. Commissioners of Excise.</b> Instructions for officers in the country, who. London : printed by J. <<<Tonson>>>, 1724.	<input type="checkbox"/>	<a href="#">Full</a>
T483290	1724	<b>Great Britain. Commissioners of Excise.</b> Instructions to be observed by the officers. London : printed by J. <<<Tonson>>>, 1724.	<input type="checkbox"/>	<a href="#">Full</a>
N54090	1724	<b>Great Britain. Customs Establishment.</b> Instructions for officers in the country. London : printed by J. <<<Tonson>>>, 1724.	<input type="checkbox"/>	<a href="#">Full</a>



# 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**”.

∞ *Update --- 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 one of 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](mailto: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.



# 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 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](mailto: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](mailto: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

<https://cbsrinfo.ucr.edu/ESTC/contribute/estc-star-help/matching-criteria>

- ∞ **In each case, please report your item 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

☞ <https://cbsrinfo.ucr.edu/ESTC/contribute>

☞ Reporting options:

Digital reporting

Paper reporting

OPAC or in-house electronic catalog



# GETTING HELP

∞ For technical help contact:

[estc-technical@cbsr.ucr.edu](mailto:estc-technical@cbsr.ucr.edu)

∞ For cataloguing help contact:

[estc-catalog@cbsr.ucr.edu](mailto:estc-catalog@cbsr.ucr.edu)

∞ CBSR website:

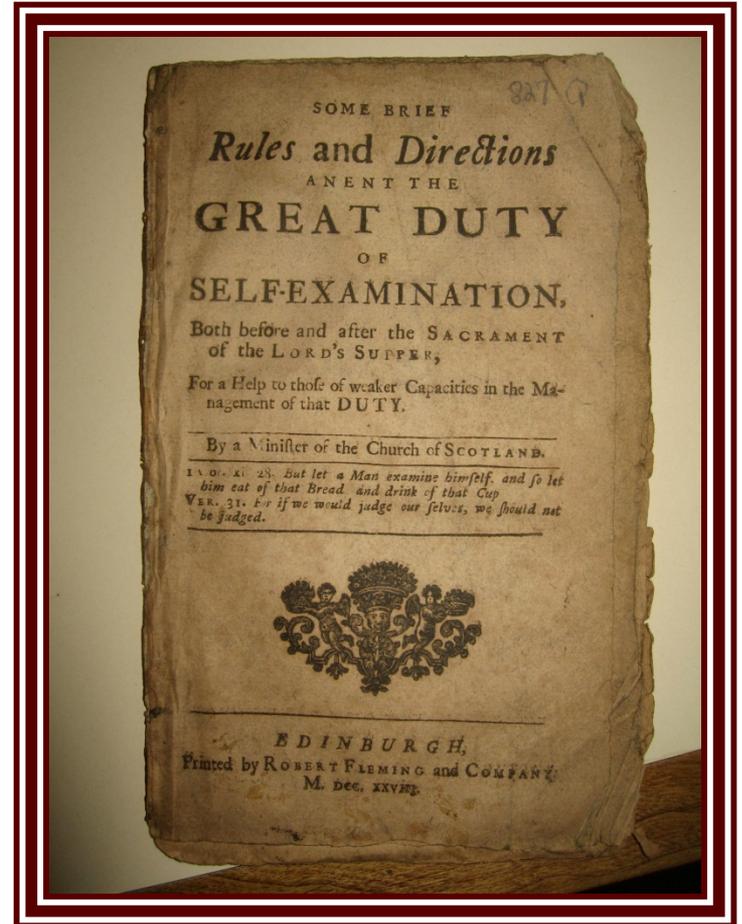
<https://cbsrinfo.ucr.edu/>

∞ Log In page:

<https://cbsrinfo.ucr.edu/ESTC/contribute>

∞ ESTC Web matching Help

<https://cbsrinfo.ucr.edu/ESTC/contribute/estc-star-help>



# OTHER CONTACT INFORMATION

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# 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 