ESTC MATCHING/REPORTING INSTRUCTIONS
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](mailto:estc-catalog@cbsr.ucr.edu))

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

WHEN IN DOUBT, ASK QUESTIONS (estc-catalog@cbsr.ucr.edu)
or SEND A REPORT (estc-reports@cbsr.ucr.edu)
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
Once you enter your user name/password and click the OK button, the ESTC search page will open up in your browser.

Note that STC and Wing are now searchable database links at bottom of page.
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
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
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.
Here are the results of the keyword search 'coffee' and imprint word 'tonson':

<table>
<thead>
<tr>
<th>RLIN</th>
<th>Year</th>
<th>Item</th>
<th>Select</th>
<th>Full Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>T31201</td>
<td>1709</td>
<td>Jonson, Ben. The alchemist a comedy. As it is now acted at the Theatrew Royal, by Her Majesty's servants. Written by Ben. Johnson. London: printed for Jacob Tonson and sold by William Lewis at the Delphin next Tomb - Coffee House in Russell Street, Covent-Garden, 1709.</td>
<td>☐</td>
<td>Full</td>
</tr>
<tr>
<td>T221096</td>
<td>1709</td>
<td>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].</td>
<td>☐</td>
<td>Full</td>
</tr>
<tr>
<td>T403290</td>
<td>1724</td>
<td>Great Britain. Commissioners of Excise. Instructions to be observed by the officers. London: printed by J. Tonson, 1724.</td>
<td>☐</td>
<td>Full</td>
</tr>
</tbody>
</table>
Now that I have my results, I can enter the date ‘1724’ in the publication date field and narrow my results to 4 records.
Match to the ESTC record when your item corresponds \textit{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

\textit{*TIP*} Always read the General notes (500) for valuable information
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
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!
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
*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
*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
*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.
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](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
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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