

Searching and Matching, AKA, Can I use this record?

General Cataloging Steps

- Search the Polaris database first for a matching record
- If a record is found, use match points to determine if the record matches your item
- If the record is a match, attach your item
- If a match is not found in the database, a record will need to be brought in
- For cataloging libraries, search OCLC:
 - If a match is found in OCLC, upgrade or edit as needed and export record into the database
 - If no match is found in OCLC, the item will require original cataloging. Create an original record in OCLC and export into the database **or** send to the SHARE cataloging center at your hub for original cataloging (fee charged)
- For barcoding libraries:
 - Hold the item and search again later, utilize the Express Cataloging option to provide a matching record to SHARE for import (some restrictions apply; fee charged), **or** send the item to the SHARE cataloging center at your hub for cataloging (fee charged)

General match points

- Numbers--i.e., ISBN, publisher number, UPC, ISSN, etc.
- Title
- Responsibility—i.e., authors, illustrators, editors, translators, directors, performers, etc.
- Edition
- Publication information
- Physical description
- Language
- Series

Sources of Information

Following are the preferred sources of information, by format:

- **Books:** Title page, then cover, spine, caption, etc., then source other than the item itself, i.e., website
- **Sound recordings:** Disc label (CDs or LPs), cassette label (cassette tapes), item itself (Playaways or other preloaded audio players), then container, then source other than the item itself, i.e., website
- **Videorecordings:** Container or disc label, then title and/or credit frame(s), item itself (Playaway Views or other preloaded video players), then source other than the item itself, i.e., website
- **Electronic resources (video or computer games, etc.):** Disc label (CD-ROMs or DVD-ROMs), cassette label (cassette tapes), item itself, then container, then source other than the item itself, i.e., website

- **Other formats (kits, toys, puppets, etc.):** The item itself, then source other than the item itself, i.e., website

Searching for Bibliographic Records

The table below suggests information to search for various formats.

Format	Starting Point(s):	Secondary Choice(s):
Books	ISBN; LCCN	Title; Author; Series
Sound recordings	Publisher's Number; ISBN; UPC number	Title; Author; Performer; Composer
Videos	Publisher's Number; UPC number; ISBN	Title; Performer; Director
Electronic resources	Publisher's Number; UPC number	Title
Serials	ISSN	Title
Government Documents	SUDOC Number	Title
Other	Title	Author, Illustrator, etc.

If a search doesn't succeed, try, try again!

List Search: If an exact search such as ISBN or LCCN doesn't find a record, try a **title** or **author** search (Exact match implicitly truncated). If a title search results in too many hits, try limiting the results by author, publisher, type of material, etc. in the **Limit By** field. Use one of the two wildcard symbols (* or ?), if necessary.

Keyword Search: Use only as a last resort. Keyword searching is very general and looks in most of the fields in the MARC record, often bringing back many hits that are not relevant.

Verifying the Bibliographic Record

General Information

Always check the bibliographic record carefully to verify that it matches the source of information for your piece. Even small deviations may mean that you need to look for a different record.

Always look at the MARC format view of a bibliographic record when comparing an item.

You will sometimes see information in a MARC record enclosed in brackets []. This means the information came from a source other than the item itself, i.e., a website, etc. If the bracketed information is followed by a "?", this indicates the cataloger made their best guess.

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Make sure you're matching to a record for the correct format and version. For example, for books, make sure you're looking at the record for the print version and not the electronic version, or the Braille version. Other examples (this is not an exhaustive list):

- Regular print, large print, "larger print", board book, etc. versions of books must be on separate records
- DVDs, Blu-rays, and Blu-ray/DVD combos must be on separate records
- Regular CDs and MP3s must be on separate records
- Abridged and Unabridged versions of audiobooks must be on separate records
- Widescreen and full screen versions of videos must be on separate records

Never attach a holding for an item in hand to an on-order or brief record. On-order records are very short, have a call number of ON ORDER, and have the title entered in all capitals. Search the database for a matching full-level (i.e., complete) record. If a matching record is not found, hold the item and search again later.

Become familiar with the SHARE local policies on record matching that are posted on the SHARE website at the Cataloging tab under Policies and Procedures. This page is updated frequently as SHARE cataloging policies are formulated and revised.

For multipart audiovisual material (i.e., DVDs and audiobooks), attach your holding to the appropriate set or individual record based on how your library intends to circulate the item. An example is the entire season of a television series that consists of several DVDs in one container. If you will be circulating the container as one piece, attach to the record for the set. If you will be circulating the DVDs separately, attach to the records for the individual DVDs.

If you find records that look the same:

- If the records are a match to your item, select one of the records and attach your holding
- Report duplicate records through the Help Desk or form on the SHARE website. From the SHARE home page, click Support>Forms. SHARE Bibliographic Services staff will evaluate the records and determine if they can be merged. When records are merged, holdings that are attached to the record being merged will automatically be transferred to the record that is retained

Stay up-to-date on changes to national cataloging rules and guidelines as well as local policies by subscribing to the SHARE-Cat listserv, where you will receive information relating to cataloging and barcoding. On the SHARE home page (share.illinoisheartland.org), click on the Connect tab, then Listservs.

MARC Fields

The list of fields below gives general guidance for matching your item to a bibliographic record.

MARC FIELD #: 010 ‡a ‡z

Field Description: LCCN (Library of Congress Control Number)

Books: If present, usually found on the title page verso, often in the Cataloging-in-Publication (CIP) data.

Other formats (sound recordings, videorecordings, electronic resources, etc): Usually do not have an LCCN.

If you search by LCCN and don't find a record, don't stop there! Search other ways.

MARC FIELD #: 020 ⌘a ⌘z

Field Description: ISBN (International Standard Book Number)

Books: Search an ISBN on the cover first, then any ISBN you find inside.

Other formats: If an ISBN is present, it will often be on the container or case.

If you search by ISBN and don't find a record, don't stop there! Search other ways.

If the ISBN on your item is not in the record, or there is a different ISBN in the record, you can attach your item as long as the other match criteria are met. The ISBN on your item should be added to the record. Cataloging libraries: Edit the bibliographic record to add the ISBN. Barcoding libraries: Submit a Help Desk ticket to request the ISBN be added to the bibliographic record.

MARC FIELD #: 022 ⌘a ⌘y ⌘z

Field Description: ISSN (International Standard Serial Number)

Check this field only if your item is a serial. ISSN numbers can be found anywhere on the item.

Do not search for serial records by ISBN, even if there is an ISBN on the item. Do not search for monograph records by ISSN.

MARC FIELD #: 024 ⌘a

Field Description: Other Standard Identifier (most often a UPC)

Books: Do not use as a search term. UPC is not recorded in bibliographic records for books.

Other formats: If a UPC is present, it will generally be on the container or case.

If the standard number on your item is not in the record, or there is a different standard number in the record, you can attach your item as long as the other match criteria are met.

If not present, the number on your item should be added to the record. Cataloging libraries: Edit the bibliographic record to add the standard number. Barcoding libraries: Submit a Help Desk ticket to request the standard number be added to the bibliographic record.

MARC FIELD #: 028 ⌘a ⌘b

Field Description: Publisher's number

Books: Do not use as a search term. Publisher's numbers are not generally recorded in bibliographic records for books.

Other formats: Often found on the disc label or the container spine.

If the publisher's number on your item is not in the record, or there is a different publisher's number in the record, you can attach your item as long as the other match criteria are met.

If not present, the number on your item should be added to the record. Cataloging libraries: Edit the bibliographic record to add the publisher's number. Barcoding libraries: Submit a Help Desk ticket to request the publisher's number be added to the bibliographic record.

MARC FIELD #: 245 \$a \$n \$p \$b

Field Description: Title

The wording of the title on your item must match the wording of the title in the record, including the subtitle, if one is present.

Books: The title in the record should match the title on the item. The preferred source is the title page, but the title may also come from the cover or other source on the book if the item doesn't have a title page. Variations in the title are entered in MARC tag 246.

Sound recordings: The title should match the title on the CD, LP, or cassette tape label. However, catalogers sometimes use the title from the container in the 245. There should be a note in a 500 field indicating the source of the title.

Videorecordings: The title should match the title on the container, disc label, or title screen. There may be a note in a 500 field indicating the source of the title.

Electronic resources: The title should match the title on the disc label. However, catalogers sometimes use the title from the container in the 245. There should be a note in a 500 field indicating the source of the title.

Other formats: Look for a title on a label or hang tag. If there is no title on the item, the cataloger will supply a title. In that case, there will be a note to that effect in the record and the title will be entered in the record in square brackets.

MARC FIELD #: 245 \$h

Field Description: General material designation (GMD)

Records for non-print material and large type books should contain a GMD. Examples are "[sound recording]", "[videorecording]", "[text (large print)]", etc.

The GMD is not a match point, but is an indication of the format of material the record is describing.

MARC FIELD #: 245 \$c

Field Description: Statement of responsibility

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The statement of responsibility on your item must match the statement of responsibility in the record. Responsibility may be one person or a group of people, a corporate body, a conference, etc.

Books and graphic novels: Includes authors, illustrators, editors, compilers, translators. For graphic novels, this may also include inkers, colorers, etc.

Sound recordings: Includes authors (audiobooks), composers (classical music), and performers (other genres of music).

Videorecordings: Includes directors, producers, screenwriters, and production companies.

Other formats: Includes authors, creators, etc.

The 245 ¢c may be formatted differently depending on which cataloging rules were used when the record was created. For example, if a book has more than three authors, in some records, you may see only the first author listed, followed by "... [et al.]". In other records, you may see all or some of the names listed, or you may see the first author, followed by "[and ... others]".

Other functions are important for matching, but are not included in the 245 ¢c. These will be found elsewhere in the record, usually in 5XX note fields.

Audiobooks: Includes narrators or readers.

Music sound recordings: Includes conductors, orchestras, other performers, etc.

Videorecordings: Includes cast members or performers, composers, costume designers, directors of photography, film editors, etc.

MARC FIELD #: 250 ¢a

Field Description: Edition

The edition statement on your item must match the edition statement in the record, with some exceptions:

Books: Exception – 1st edition. If your item says "First edition" but the record doesn't, or the record says "First edition" and your item doesn't, you may attach to the record as long as the other match criteria are met.

A book with "book club edition" may be attached to the record for the regular edition as long as the other match criteria are met.

Audiobooks: Should contain MARC field 250 with "Unabridged" or "Abridged" as applicable. This needs to match your item. This information may also be found in MARC tag 500.

Videorecordings: May contain MARC field 250 with "Widescreen" or "Full screen". This information may also be found in a note field. This needs to match your item. This information may also be found in MARC tag 500.

The edition statement may be in an abbreviated or spelled-out form.

MARC FIELD #: 260 ⚭a

Field Description: Place of publication

Or

MARC FIELD #: 264 ⚭a

Field Description: Place of publication

In general, the place of publication on the item should match the record, but it's flexible:

If your item has a different place of publication, but it's in the same country as what's in the record, that's okay. A different country of publication requires a different record.

If your item lists several places of publication and one of those matches what's in the record, that's okay.

If there is no place of publication on the item, you might see:

The abbreviation "[S.I.]" *or,*

A place name in brackets, such as "[New York, New York]", indicating the cataloger got the place of publication from another source *or,*

The phrase "[Place of publication not identified]".

MARC FIELD #: 260 ⚭b

Field Description: Publisher

or

MARC FIELD #: 264 ⚭b

Field Description: Publisher

The publisher of your item must match the publisher in the record.

In some records, the form of the publisher's name may vary slightly (e.g., St. Martin's Press vs. St. Martin's) and abbreviations such as Inc. or Ltd. may be omitted. In other records, the publisher's name will be recorded as it is on the item.

If there's no publisher on the item, you might see:

The abbreviation "[s.n.]" *or,*

A publisher's name in brackets, such as "[J. Smith]", indicating the cataloger got the publisher from another source *or,*

The phrase "[publisher not identified]".

MARC FIELD #: 260 ⚭c

Field Description: Date

or

MARC FIELD #: 264 ⚭c

Field Description: Date

The publication or copyright date on your item must match the date in the record.

Books: Look first for a publication date. If there is no publication date on the item, look for a copyright date, denoted by the © symbol or the word copyright.

Sound recordings: Generally do not have a publication date. Look for a copyright date, which in sound recordings is denoted by the ® symbol or the word phonogram.

Other formats: Often do not have a publication date. Look for a copyright date, denoted by the © symbol or the word copyright.

Dates can be very complicated and confusing. See the *Dates in Bibliographic Records* handout for guidance.

If there is no date on the item, you might see:

Rarely, the abbreviation “[n.d.]” or,

Also rarely, the statement “[publication date not identified]” or,

Commonly, a date or range of dates in brackets, in some cases followed by “?” if the cataloger guessed at the date(s).

MARC FIELD #: 300 ♣a

Field Description: Extent

The extent of your item must match the extent as described in the record.

Books: Includes numbered pages (including roman numerals), or the number of volumes in a multi-volume set. Pages that are printed on only one side will be described as “leaves”.

If a book’s pages aren’t numbered, you might see:

A number in brackets, indicating the cataloger counted the pages or leaves or,

A statement such as “12 unnumbered pages” or,

The statement “1 volume (unpaged)” with “volume” abbreviated or spelled out.

If a book has several sections, each with separate numbering, you might see:

The sequences listed, such as “iv, 215, 35 pages” with “pages” abbreviated or spelled out

or,

The statement “1 volume (various pagings)” with “volume” abbreviated or spelled out.

If there are differences in page numbering:

If the book has more than 10 pages, a difference of no more than 3 pages is okay.

If the book has 10 or less pages, any difference in paging means you’ll need to search for a different record.

Sound recording: Includes the number of tapes or discs, often followed by a time, such as “6 sound discs (approximately 9 hr.)”. The discs may also be described as “audio discs”. You may see “approximately” abbreviated as “ca.”

If a playing time is indicated, check the time of your item against the time in the record. If there is a significant difference, you'll need to look for a different record.

Videorecordings: Includes the number of tapes or discs, often followed by a time, such as "6 videodiscs (1 hr., 30 min.). The time should be for the feature presentation only, not including special features. You may see "approximately" abbreviated as "ca."

If a playing time is indicated, check the time of your item against the time in the record. If there is a significant difference, you'll need to look for a different record.

Other formats: Includes number of units, depending on the format. Examples include the number of components (kits), number of pieces (puzzles), etc.

MARC FIELD #: 300 ±b or other 3XX fields

Field Description: Other physical details

Check the details of your item against the details in the record.

Books: For books with illustrations, the record may or may not include 300 ±b with information about the illustrations, such as whether the illustrations are color, or include specific types of illustrations, such as maps or portraits.

If your book is illustrated but the record has no information about illustrations, you may still attach your holding to the record, as long as the other match criteria are met.

Sound recordings: Includes the type of recording, such as "analog" or "digital", or format, such as "MP3". If this information is not recorded in the 300 ±b, it may be available in other 3XX fields in the record.

Videorecordings: Includes whether the video has sound or is silent, and whether it's in color or black and white, or a combination. If this information is not recorded in the 300 ±b, it may be available in other 3XX fields in the record.

Other formats: Includes further information, depending on the format. May include color information, type of material, etc.

MARC FIELD #: 300 ±c

Field Description: Dimensions

The dimensions of your item must match the dimensions in the record.

Books: Measure the height in centimeters, rounding up to the next higher centimeter. Measure the height only. Exceptions: if the book is wider than it is tall, or the width is less than half the height, both measurements should be recorded in the 300 ±c.

A difference of 2 cm or less for books is okay, or if the difference is only due to binding, i.e. a paperback book bound by Follett, Turtleback, etc.

Sound recordings, videorecordings, electronic resources: For discs, measure the diameter of the disc, in inches. The standard size of CDs, CD-ROMs, DVDs, DVD-ROMs, and Blu-ray discs is 4 ¾ in.

Other formats: May include dimensions of the item or the container in centimeters.

MARC FIELD #: 300 ‡e

Field Description: Accompanying material

Describes material that is included in addition to the primary piece that is being described in the 300 ‡a ‡b ‡c. Examples include a test book with an accompanying CD-ROM, a book with a puppet, a video with a teacher's guide, etc.

If your item has significant accompanying material, it needs to be on a separate record from a record for the item alone.

MARC FIELDS #: 3XX (Other than MARC tag 300)

Field Description: Physical description fields

Records may contain many 3XX fields in addition to the 300. MARC fields 336, 337, and 338 may be disregarded in the matching process. Other 3XX fields may contain information that is useful for matching.

MARC FIELD #: 4XX/8XX

Field Description: Series

Series information on the item needs to match series information in the record:

If the record has a series statement, and there is no series statement on your book, you may attach your holding to the record, as long as the other match criteria are met.

If your book has a different series statement than what's in the record, you'll need to search for a different record.

MARC FIELD #: 505

Field Description: Content

The contents of your item needs to match the contents note in the record. Examples might be the titles of songs on a sound recording or the titles of short stories in a collection, etc.

MARC FIELD #: 538

Field Description: System details

Includes technical information about recording systems, computer or other equipment requirements, etc.

MARC FIELD #: 546

Field Description: Language

The language(s) of your item needs to match the language(s) in the record.

For **videorecordings**, be careful to check the languages of the soundtrack(s) and subtitles. Those languages need to match what's in the record. This includes whether or not the video is close captioned or subtitled for the hearing impaired, or described for the visually impaired.

MARC FIELDS#: 5XX

Field Description: Notes

Note fields vary by format and by the individual item. They often contain information that will help you decide if your item is a match to a record.

For **videorecordings**, check to see if the recording format is widescreen or full screen, etc. The recording format of your item must match the recording format in the record. This information may also be recorded in MARC tag 250.

Bibliographic records for serials

A serial is defined as a continuing resource that is issued in a succession of discrete parts, usually bearing a numeric and/or chronological designation, and is intended to continue indefinitely. Examples of serials include magazines, annual publications such as test study guides or travel guides, school yearbooks, etc.

Bibliographic records for monographs differ from bibliographic records for serials. A monograph record describes one particular work, i.e. the book *A is for Alibi* by Sue Grafton, published in London by Pan Books in 1993. A serial record describes the entire run of the serial starting from the earliest issue available until it ceases being published, or a change in title requires a new serial record. When searching the database for a matching record for a serial item, you may find both a serial record and monograph records for the individual parts of the serial. See the general information in the first section of this handout, or the SHARE cataloging standards for guidelines on when to attach to a serial vs a monograph record.

General guidelines

The ISSN is the best way to start a search in the database. If that doesn't get a result, try a title search. Do not search by ISBN for a serial record, even if your item has an ISBN.

The publisher in the 260 or 264 field may not be the same as the publisher on your item. The publisher may have changed since the serial began. Some serial records will have multiple 260 or 264 fields to show changes in publisher, and some will show the changes in a 500 note field. Even if the publisher on your item is not listed, you can still use the record, if you determine it's a match. Your publisher will

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need to be added to the record.

There may or may not be a $\pm$ c in the 260 or 264 field. If there is a date, it may be open-ended, i.e., 1997-, or there may be a range of dates, i.e., 1997-2005, depending on if the serial is still being published or has been closed.

The 300 $\pm$ a may contain the abbreviation "v." indicating the serial is continuing, or may have a number of volumes, i.e. "50 v." indicating the serial is no longer being published and the entire run was 50 volumes.

The size in the 300 $\pm$ c may not match the size of your item, since the dimensions of the serial may have changed from when it was originally cataloged.