

## Session 8: Matching and Editing

- Quick match criteria
- Search tips
- Necessary edits
- Reporting errors to OCLC
- Editing CIP records
- "K" level edits

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## General Cataloging Steps

- Search your own catalog first for a matching record
- If a record is found, use "Quick Match Criteria" to determine if the record matches your item
- If a match is found attach your item
- If a match is not found in your catalog, search in OCLC for a match

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## General Cataloging Steps

- If a match is found in OCLC export that record into your database (following your local procedures) and do any necessary edits
- If a match is not found in OCLC, the item will require original cataloging

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## Matching

- When you are matching, you must determine if the item in hand matches the record that you have found
- Often you will find more than one record that may be a match
  - In that case, try to determine the best record

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## Matching

- We will be looking at the Quick Match Criteria developed by Deborah Fritz for her book: *Cataloging with AACR2 and Marc 21*

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## Quick Match Criteria

Basis of these guidelines:

- "When to Input a New Record" in *OCLC Bibliographic Formats and Standards*. 3rd ed. 2003. Online document. August 31, 2005  
<http://www.oclc.org/bibformats/en/input/>
- *Differences Between, Changes Within*. 2004. Chicago: ALCTS  
<http://www.ala.org/ala/alcts/alctspubs/catalog/catalog.htm>
- AACR2 2nd ed. 2002 rev.--21.2 and 21.3 and Ch. 12 rules on changes for individual areas of information
- LCRI 1.0

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## Quick Match Criteria

These guidelines apply to single part monographs and to comparisons between the same parts of a multipart monograph. Consider changes in most fields between the parts of a multipart monograph to be minor

Remember to take the information that you are trying to match from the appropriate prescribed source of information (see *italics* in column on left). If no source is listed, the information can come from any source. In this table, *t.p., etc* = title page, other preliminaries (incl. t.p. verso and covers), and colophon; *whole* = the whole resource

© D. Fritz, Cataloging with AACR2 and MARC 21

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## Quick Match Criteria

- Get out D. Fritz's Quick match chart
- Now we will review how to use the chart

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- It's important to remember that the Quick Match Criteria applies only to full level records
- If a record is a CIP record - Encoding level 4 or 8, it might be a match even if several match points are different
  - It might have a different title, statement of responsibility, publisher, date, etc.
  - Sometimes the only thing that really matches is the LCCN

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- We will now be matching our title pages to OCLC records
- We still won't be editing the matching records -- we'll save that for the final step

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## A Century of Great Western Stories

- When we did a title search in OCLC, we got 8 records that could possibly be matches
- When we searched by ISBN, we got three possible matches

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## Quick Match Criteria

- Using the Quick Match Criteria select the matching record for "A Century of Great Western Stories"

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- Sometimes there will be more than one record that matches your item
- The hierarchy you should use for selection of the best record:
  - DLC full level
  - DLC CIP
  - Member cataloging - full level
  - Member cataloging - less than full

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- OCLC does merge duplicate records
- The hierarchy they use to decide which record to keep:
  - They keep the record input by a national library
  - If none were input by a national library, and one record is clearly not better than the other, they keep the one put in OCLC first

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- When an OCLC record is merged to another, the OCLC control number of the merged record gets added to the record that is kept in the 019
- 019 is indexed in OCLC, so you are always able to search by the OCLC number of the record that got merged

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## Quick Match Criteria

- Using the Quick Match Criteria select the matching record for "Friend Within the Gates"

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## Quick Match Criteria

- Using the Quick Match Criteria select the matching record for "Shadow of the Storm"

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## Far from the Madding Crowd

- Searched by title and qualified by date (2002)
- Six possible matches were found

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## Quick Match Criteria

- Using the Quick Match Criteria select the matching record for "Far from the Madding Crowd"

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## Match on Your Own

- Find your exercise packet and the matching OCLC records
- Find the best match for each title page



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## Editing

- Many records require some type of editing after they are brought into the local database
- Your library or LLSAP probably has local guidelines on the type of edits that should always be done
  - If not, it might be a good idea to have some discussion on this, so that all the catalogers are doing the same thing

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## Editing

- When you are considering what edits to do, you should always be thinking about access
- You also need to know how your local system functions and is indexed
  - e.g., If your local system searches an "&" as & and as the word and, you don't need to make a 246 spelling out an "&"

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- When editing records, always think about increasing access
- Some of the ways to increase access
  - Adding a missing ISBN
  - Adding the EAN (024 - International article number)
  - Adding necessary variant title entries
  - Adding all the access points stipulated in AACR2 Chap. 21 - illustrators, editors, etc.

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- Another issue to consider when editing is errors in OCLC
- There is a fine line sometimes between what constitutes an error in an OCLC record, and what constitutes the need for a new record
- A misspelled word in a title could sometimes be that way on the title page, or an error on the part of the cataloger
- Publishers and dates are often open to interpretation
- Even what should be simple things like pagination, and illustrations can sometimes be open to interpretation

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## Reporting errors to OCLC

- OCLC encourages members to report errors
- For complete details on how to do this, and the types of errors to report, go to:

<http://www.oclc.org/bibformats/en/quality/#CIAIEEJD>

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## Reporting errors to OCLC

- OCLC makes the following changes without proof:
  - Changes to incorrect tags, indicators and subfield codes
  - Changes evident from other information in the record (e.g. corrections to the date fixed field based on the 260)
  - Apparent errors in transcription
- These errors can be reported online via Connexion


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# Reporting errors to OCLC

- OCLC requires proof for most changes
- When sending proof, by fax or mail, send clearly labeled photocopies with the error report
- Mark the pages as:
  - Title page
  - Title page verso
  - Cover, spine, etc.

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# Reporting errors to OCLC


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**WORLDCAT RECORD CHANGE REQUEST**

Type Code Change     Filing Indicator Change  
 Bibliographic Record Change

You may include more than one record on each request. Use this form to send all type code, filing indicator and bibliographic record changes that require proof.

When submitting a list that has accumulated over a period, recheck the system to verify that the requested changes are still necessary.

If proof (photocopy) is required, attach proof of the title page and/or other supporting documentation and submit it to the OCLC Quality Control Section or your regional service provider. You may also fax this form with proof to 1-800-706-6252. Refer to *Bibliographic Formats and Standards*, chapter 5, for guidelines.

Note: OCLC reserves the right to process the requested changes at its discretion.

OCLC Control no. \_\_\_\_\_  
 LC Control no. (010 #a) \_\_\_\_\_  
 Input by (OCLC symbol 040 #c) \_\_\_\_\_  
 Reported by (OCLC symbol) \_\_\_\_\_  
 Submitted by Name \_\_\_\_\_  
 E-mail \_\_\_\_\_  
 Date \_\_\_\_\_

Author (1xx) \_\_\_\_\_  
 Title (245 #a) \_\_\_\_\_  
 Fixed Field Mnemonic and Code: \_\_\_\_\_  
 Requested Change: \_\_\_\_\_

Tag	Text Form Record:
-----	Requested Change: _____
-----	Requested Change: _____
-----	Requested Change: _____

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## Reporting errors to OCLC

- Duplicate records may also be reported to OCLC
- They can be reported online or via a form

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## Basic Edits

- When bringing a record into your database for the first time, you should look at every line
- Just because you don't know what a MARC tag is, or does, don't automatically remove it
- We should be cataloging for the future as well as the present
  - Online systems improve every day
  - e.g., someday online systems will take the 043 (geographic code) and use it to qualify searches, etc.

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## Editing Checklist

- Get out your Editing checklist

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## Edit #1

- Find the title page for "Friend Within the Gates" in your Examples
- Find the corresponding OCLC record, #1021803

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OCLC 1021803 No holdings in IEU - 75 other holdings

Rec stat c	Entered 19740926	Replaced 20001204
Type a	ELvl l	Srcd d
BLvl m	Form	Conf 0
	Cont	GPub
Desc	Ills	Fest 0
		DiSt t
		Dates 1973 , 1960
040	WSU #c WSU #d OCL	
082	926.1	
090	D630.C3 #b H63 1973	
092	#b	
049	IEUA	
100 1	Grey, Elizabeth, #d 1917-	
245 1 0	Friend within the gates; #b the story of nurse Edith Cavell, #c by Elizabeth Grey [pseud.]	
260	[New York, #b Dell Pub. Co., #c 1973, c1960]	
300	194 p. #c 19 cm.	
490 0	A Yearling book	
600 1 0	Cavell, Edith, #d 1865-1915.	

Delete Holdings- Export- Label- Produce- Submit- Replace- Report Error- Update Holdings- Validate-  
Workflow-In Process

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## Edit #2

- Find the title page for "Shadow of the Storm" in your Examples
- Find the corresponding OCLC record, #51723449

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OCLC 51723449 No holdings in IEU - 102 other holdings

Rec stat c	Entered 20030221	Replaced 20050102			
Type a	ELvl l	Srce d	Audn	Ctrl	Lang eng
BLvl m	Form	Conf 0	Blpg	MRec	Ctry nyu
	Cont	GPub	LitF 1	Indx 0	
Desc a	llls b	Fest 0	DISt s	Dates 2003 .	

```

040 1 OWL #c OWL #d DAY #d OCLCQ
043 n-usp-
090 PS3557.I124 #b S52 2003
082 #b
049 IEUA
100 1 Giambastiani, Kurt R. A.
245 0 Shadow of the storm / #c Kurt R.A. Giambastiani.
260 New York : #b New American Library, #c c2003.
300 348 p. : #b map ; #c 18 cm.
500 Subtitle on cover: An alternate history.
650 0 Indians of North America #x Wars #z West (U.S.) #v Fiction.
650 0 Cheyenne Indians #v Fiction.
650 0 Fantasy fiction, American.
655 7 Alternative histories (Fiction) #2 gsafd
655 7 Adventure fiction. #2 gsafd
655 7 Western stories. #2 gsafd

```

Delete Holdings- Export- Label- Produce- Submit- Replace- Report Error- Update Holdings- Validate-  
Workflow-In Process

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## Editing CIP records

- CIP records can be identified by the "Elvl" field in the fixed field
- An 8 or 4 signifies a CIP record
- Every field should be looked at very carefully
- Don't automatically assume that a 300 in a CIP record is correct
  - UKM arbitrarily adds 300 fields

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## CIP edit

- Find the title page for "A Century of Great Western Stories" in your Examples
- Find the corresponding OCLC record, #44437557

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OCLC Connexion Page 1 of 1

OCLC 44437557 No holdings in IEU - 3 other holdings

Rec stat c	Entered 20000609	Replaced 20030715			
Type a	ELvl 8	Srcr	Audn	Ctrl	Lang eng
BLvl m	Form	Conf 0	Blpg	MRec	Ctry nyu
	Cont	GPub	LRF 1	Indx 0	
Desc a	Ills	Fest 0	DIST s	Dates 2000 ,	

---

040 UKM #c UKM #d OCLCQ  
015 GBA0-X5064  
020 031286986X  
029 0 UKM #b bA0X5064  
082 0 4 813.08740805 #2 21  
092 #b  
049 IEUA  
245 0 2 A century of great Western stories / #c edited by John Jakes.  
260 New York : #b Forge ; #a Maidenhead : #b Mella, #c 2000.  
300 384 p. ; #c 24 cm.  
650 0 Western stories, American.  
700 1 Jakes, John, #d 1932-

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Delete Holdings- Export- Label- Produce- Submit- Replace- Report Error- Update Holdings- Validate-  
Workflow-In Process

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## Upgrading K level records

- "K" level records are input as incomplete records
- The cataloger either knew she/he was not doing everything she/he should, or wasn't sure about some of the record
- Anyone with full level OCLC authorization can upgrade a "K" level record

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## Upgrading K level records

- To upgrade a "K" level record, you must lock it, make the necessary changes, and then replace it
- If you upgrade a "K" level to an "I" level, you must be very sure that you are fixing everything

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