



THE INFORMATION NETWORK FOR OHIO SCHOOLS

## Guidelines for Matching MARC Records

<http://www.infohio.org/Documents/CRCTF/GuidelinesMatchingMARC.pdf>

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These guidelines are intended to help you determine whether an existing bibliographic record corresponds to an item you are searching.

If an item does not match a bibliographic record, the differences will usually occur in more than one field. If a difference occurs in a single field, you must determine whether there are two separate items with only one significant difference, or whether the difference is due to an error in cataloging or a difference in cataloger opinion. Errors should be corrected and the document *Guidelines for Evaluating MARC Records* is intended as a guide in that process.

### Guidelines for matching all formats

When comparing records, closely examine the bibliographic description to determine whether a bibliographic record matches the item being searched. The bibliographic description in the MARC record should be matched to the preferred source of bibliographic data on the item (item's chief source of information).

#### Item's Chief Source of Information

Print (in order of importance)	Non-print
Title page	Item (actual cassette, CD, title frame or label permanently attached)
Verso (back of title page)	Accompanying textual material
Last numbered page	Container box or sleeve
Cover (not the book jacket)	Other sources

#### Search Strategies

1. Searching on ISBN is a good way to get a record, but it does not mean you will have a matching record. The item still must be compared to the record. Because publishers sometimes reuse ISBN numbers, matching ISBNs may not represent matching titles. When ISBN fails to locate a record, use the search strategies below.
2. To retrieve an exact title at the Union Catalog, use the semicolon (;) to end the title entry. Otherwise, MultiLIS will call up all titles which contain the words entered regardless of the order in which the words appear in the title.
3. Do a combination author / title search to narrow the search on common titles.
4. Use the sort option when several similar titles appear.
5. When searching for non-print items with corresponding print titles, try including the GMD in the title search (e.g., "Hamlet video\*" to locate video recordings of Hamlet rather than a book). There may be video recordings that do not contain the GMD in the title field and would not be retrieved in such a search. Therefore, use it only when helpful.

**Following table of match points may not apply to serials.**

**The absence or presence of a bibliographic field does NOT indicate a mismatch.**

**Differences** between the item in hand and the record DO indicate a mismatch.

**Variations** do NOT indicate a mismatch.

<b>DIFFERENCES (item &amp; record DO NOT MATCH)</b>	<b>VARIATIONS</b>
<b>028 \$a Publisher Number</b> <ul style="list-style-type: none"> <li>• Difference in publisher number for non-print</li> </ul>	
<b>1xx \$a Author</b>	<b>1xx \$a Author</b> <ul style="list-style-type: none"> <li>• Variations due to form of entry (e.g., pseudonym versus name authority)</li> </ul>
<b>24x \$a Title</b> <ul style="list-style-type: none"> <li>• Difference in wording of title and subtitle</li> <li>• Difference in authors, editors, illustrators</li> </ul>	<b>24x \$a Title</b> <ul style="list-style-type: none"> <li>• Variation resulting from difference in choice of chief source of information</li> <li>• Variation in how title is recorded (e.g., Keats' poetry versus Poetry)</li> <li>• GMD missing (check 300 field to match)</li> <li>• Variation in length resulting from judgment of what constitutes the title proper (e.g., a difference in the placement of subfield \$b)</li> <li>• Variation in bracketed information, capitalization, diacritics, ellipses, initial articles, punctuation or special characters</li> <li>• Variation in expanded forms of non-English abbreviations, numerals, etc.</li> </ul>
<b>250 \$a Edition</b> <ul style="list-style-type: none"> <li>• Difference in numbered edition/version statement</li> <li>• Difference in edition statement which reflects content (student ed. versus teacher's ed.)</li> <li>• Difference in date designation associated with edition (e.g., Draft, Jan. 1989 versus Draft, May 1989)</li> <li>• Difference in statements indicating abridgment, enlargement, etc.</li> <li>• Difference in statements indicating "draft," "preliminary," "revision," etc.</li> <li>• Difference in statements indicating geographic coverage (e.g., Midwest ed. versus Western ed.)</li> <li>• Difference in statements indicating language content (e.g., Spanish ed. versus Italian ed.)</li> </ul>	<b>250 \$a Edition</b> <ul style="list-style-type: none"> <li>• Placement of information in record, 250 versus a 500 tag.</li> <li>• "Paperback edition" if that is the only difference</li> <li>• "Book club edition" if that is the only difference</li> <li>• "First edition" if that is the only difference</li> </ul>

<p><b>260 \$a Place of Publication</b></p> <ul style="list-style-type: none"> <li>• Different country (U.S. versus Great Britain) unless the publication is published by an agency with offices in both countries.</li> </ul>	<p><b>260 \$a Place of Publication</b></p> <ul style="list-style-type: none"> <li>• Place within the same country (Chicago versus New York)</li> <li>• Absence or presence of a place of publication if known only from an outside source (e.g., [Ohio?] versus [S.I.] )</li> <li>• Variation among issues or parts of a serial or multipart item</li> <li>• Variation in choice of place for items with more than one place of publication (e.g., if an item is published in London and New York, a British library enters only London, but a U.S. library enters only New York)</li> <li>• Variation in multiple places of publication as long as the first place is the same (e.g., an item published in Denmark may show only Kobenhavn, but the same item issued in the U.S. shows Kobenhavn and Philadelphia)</li> <li>• Variation in form of name (e.g., Cologne versus Köln)</li> </ul>
<p><b>260 \$b Publisher</b></p> <ul style="list-style-type: none"> <li>• Different publisher</li> </ul>	<p><b>260 \$b Publisher</b></p> <ul style="list-style-type: none"> <li>• Multiple publishers, places of publication, as long as one on the item matches one on the record</li> <li>• Variation in form of the name (e.g., John Wiley &amp; Sons versus Wiley)</li> <li>• Variation in choice of a publisher when the publishers are part of the same organization (e.g., Puffin versus Penguin). In some cases the publisher on the title page may differ from the one on the record. Is the publisher identifier the same in the ISBN (first 5 digits) for both the publisher on the item and on the record? For example, Puffin is part of Penguin. A cataloger may choose to use Penguin as the publisher instead of Puffin.</li> <li>• Absence or presence of a publisher if known only from an outside source (e.g., [A.B. Smith] versus [s.n.] )</li> <li>• Change of publisher among issues or parts of a serial or multipart item</li> <li>• Variation in choice of publisher for an item having more than one publisher</li> </ul>
<p><b>260 \$c Date</b></p> <ul style="list-style-type: none"> <li>• Different publication date</li> <li>• Copyright date must match if that is the ONLY date available, otherwise ignore copyright dates</li> </ul>	<p><b>260 \$c Date</b></p> <ul style="list-style-type: none"> <li>• Variation in copyright dates if the publication dates are the same</li> <li>• Addition of a printing date</li> </ul>

<p><b>300 \$a Extent</b></p> <ul style="list-style-type: none"> <li>• Difference in number of pages is greater than 10</li> <li>• If record is for single volume and the item in hand is two-volumes or vice versa</li> <li>• Difference in number of cassettes, videos, etc.</li> <li>• Different format of item (book, cassette, etc.)</li> <li>• Size of item in some cases (trade versus a board book)</li> <li>• Difference in specific technical details such as sound versus silent or b&amp;w versus col.</li> <li>• Differences in the medium of recorded accompaniment to projected media (e.g., cassette versus disc)</li> <li>• Large print versus regular print</li> <li>• Braille version versus regular print</li> </ul>	<p><b>300 \$a Extent</b></p> <ul style="list-style-type: none"> <li>• Variation of 10 pages or less</li> <li>• Variation of 2 cm. Or less (variation may be due to binding practices)</li> <li>• Accompanying material may be cataloged separately or described in a note</li> <li>• Minor variations because of bracketed or estimated data</li> <li>• Minor variations in paging if that is the only difference</li> <li>• Variation caused by local binding</li> <li>• Variation in paging because of a section (e.g., an index being numbered in one printing and unnumbered in another printing)</li> <li>• Variation in preliminary paging, post paging or separate numbering</li> <li>• Variation in recording data because of different cataloging rules</li> <li>• Variation in the number of parts for an incomplete multipart item (e.g., record indicates 5 v. and the library now has v. 6-7)</li> </ul>
<p><b>4XX \$a Series</b></p> <ul style="list-style-type: none"> <li>• Difference in series name</li> </ul>	<p><b>4XX \$a Series</b></p> <ul style="list-style-type: none"> <li>• Series on item but not in record, or vice versa</li> <li>• Variation in tracing decision of form (e.g., fields 440 versus 490 with 830)</li> </ul>
<p><b>5XX \$a Notes</b></p> <ul style="list-style-type: none"> <li>• Notes indicating the need for different equipment in the case of audiovisual media (e.g., Beta versus VHS)</li> <li>• Described video versus regular video</li> <li>• Notes indicating differences in the language, edition, format, or content of the item may justify a new record.</li> </ul>	<p><b>5XX \$a Notes</b></p> <ul style="list-style-type: none"> <li>• Choice of a specific 5xx field versus a general field 500 note</li> <li>• Notes indicating the presence of accompanying material</li> <li>• Notes relating solely to holdings, in-house binding, missing pages and other imperfections, etc.</li> </ul>
<p><b>505 \$a Formatted Contents Notes</b></p> <ul style="list-style-type: none"> <li>• Difference in contents when note is complete</li> </ul>	<p><b>505 \$a Formatted Contents Notes</b></p> <ul style="list-style-type: none"> <li>• Variation due to completeness</li> </ul>
<p><b>538 \$a System details Note</b></p> <ul style="list-style-type: none"> <li>• Differences in required access</li> </ul>	<p><b>538 \$a System details Note</b></p> <ul style="list-style-type: none"> <li>• Location of system details information within the record</li> </ul>
<p><b>753 \$a System Details Access to Computer Files</b></p> <ul style="list-style-type: none"> <li>• Differences in technical details</li> </ul>	<p><b>753 \$a System Details Access to Computer Files</b></p> <ul style="list-style-type: none"> <li>• Location of system details information within the record</li> </ul>