



ESTC
MATCHING/REPORTING
INSTRUCTIONS

THE ART OF MATCHING

An Overview

The English Short Title Catalogue (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 ESTC.

Matching is the process of comparing what you have in hand to what is already catalogued in 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 'New Item' and 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 1801
- ☞ All letterpress items printed in the USA (1776-1800) or bearing an imprint as such
- ☞ Any letterpress item printed wholly or partly in English or any other British vernacular anywhere else in the world before 1801

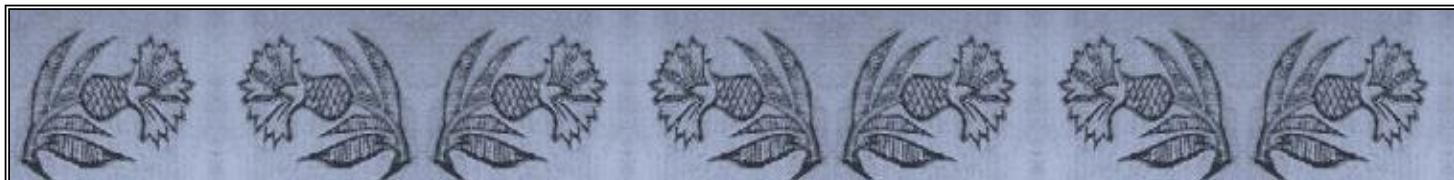
WHEN IN DOUBT, ASK QUESTIONS (estcfeedback@bl.uk)
or SEND A REPORT (estcreports@bl.uk)



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

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ESTC OUT-OF-SCOPE MATERIAL

- ☞ Anything printed in 1801 or later
- ☞ Items **not** published in English or any other British vernacular **and** published outside of Great Britain, its former territories or the USA
- ☞ Engraved maps, scores, music, illustrations, etc. ***with no letterpress text***
- ☞ Playbills, concert and theatre programmes
- ☞ Playing cards, games, puzzles
- ☞ Trade cards, labels, tickets, visiting cards, invitations, bookplates, currency

All items cited in Wing and STC are within the scope of the ESTC even if they fall into any of these categories

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ESTC OUT-OF-SCOPE MATERIAL

- ∞ Manuscript items
- ∞ Electronic versions
- ∞ Microfilm
- ∞ Photostat/Photocopy/Facsimile reproductions
- ∞ Other media forms

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WHERE TO BEGIN?

- ∞ You will need a matching account to begin working in ESTC
- ∞ If you had an account in the past, contact us for information about how to access your account
- ∞ If your institution is new to ESTC, contact us with your institution's preferred name, address and contact information and we will create an ESTC library ID and an account for your institution

Contact: estcaccounts@bl.uk

LOGGING IN TO ESTC

You can start at the ESTC home page:

<https://datb.cerl.org/estc>

Click on the Login button
(in the header or the footer of the page)

Or

Go directly to the **login page**:
https://datb.cerl.org/_login/estc

and

Enter your login credentials



LOGGING IN TO ESTC

Once you enter your username/password and click the **Submit** button, your name will appear in the right-hand corner in place of the Login link



English Short Title Catalogue

The English Short Title Catalogue (ESTC) is the most comprehensive resource available for the output of the printing press in the English-speaking world before 1801.

ESTC is a bibliography that aims to record every distinct letterpress item produced during the hand-press era in these regions. It is also a union catalogue that lists copies of those items held by libraries and other owners around the world as well as links to digital reproductions where available. Begun in the late 1970s and with its roots in Pollard and Redgrave's Short-Title Catalogue of Books Printed in England, Scotland, & Ireland and of English Books Printed Abroad 1475-1640 (STC), ESTC currently contains about 500,000 records and more than 3 million holdings. It is co-managed by the British Library and ESTC North America (ESTC/NA).

BASIC SEARCH

- ☞ You can do a Basic Search by using keywords in the search box. This will search **all** indexes. Searches are not case sensitive. Multiple search terms will automatically be combined with Boolean operator AND
- ☞ A basic search searches the **bibliographic record** and the **holdings**, i.e. a basic search for “Shakespeare” will include all records with a holding for the Folger Shakespeare Library
- ☞ It is possible to use the Boolean operators NOT and OR in a basic search but bear in mind that basic search is **not** limited to any index so it will include/exclude terms found anywhere in the bibliographic record or the holdings.
- ☞ Use right truncation * to broaden your search, e.g. Novel* will find all instances of novel, novels, novella, novelist etc.
- ☞ Use double quotation marks (“) to search for a phrase, e.g. “the Angel and Crown”
- ☞ Once you have run a search, you can then refine your results by choosing the following Facets on the right-hand side of the results page:

- ☞ Digital Reproduction Available
- ☞ Holding Institution
- ☞ Place of Publication
- ☞ Genre/Form
- ☞ Decade

- ☞ Record Type
- ☞ ESTC Subsets: STC Imprints 1473-1640
Wing Imprints 1641-1700
18th Century Imprints 1701-1800
North American Imprints 1635-1800
Serial Imprints 1603-1800

ADVANCED SEARCH

Use Advanced Search to combine your search terms and to formulate more complex queries.

- ∞ Advanced Search can be accessed from the main ESTC webpage:



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Or

- ∞ From the results' list (once a basic search has been performed)

ADVANCED SEARCH

Use Advanced Search to combine search terms from several indexes. The following indexes can be combined in Advanced Search:

- ❑ Words anywhere
- ❑ ESTC No.
- ❑ Author
- ❑ Title
- ❑ Uniform Title
- ❑ Place of publication
- ❑ Publisher/Printer
- ❑ Date
- ❑ Printed before
- ❑ Not printed before
- ❑ Printed between
- ❑ Printed after
- ❑ Not printed after
- ❑ Notes
- ❑ Citation/References
- ❑ Subject
- ❑ Genre/Form
- ❑ Names
- ❑ Country of Publication
- ❑ Language
- ❑ Format
- ❑ Holding institution
- ❑ Shelfmark
- ❑ Copy specific notes
- ❑ Digital copy present

ADVANCED SEARCH

Use Advanced Search to search one or more indexes

- ∞ Searches are not case sensitive
- ∞ Searches are combined with the default Boolean operator **AND**

Example:

Author	shakespeare	1084▶
Printed after	1750	663▶
Language	French	1▶ 

Clicking on the number of results will display the records in the results' list:

- 1 [Shakespeare, William, 1564-1616.](#)
[Le marchand de Venise, comedie traduite de l'anglais de Shakespeare \[sic\].](#)
[Londres \[i.e. Paris?\] : et se trouve a Paris, chez Grangé. De La Lain\[.\] Valade, 1768.](#)
ESTC No.: N34780

ADVANCED SEARCH

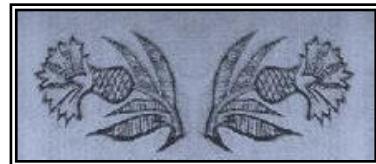
Clicking on a record in the result's list will expand it:

Shakespeare, William, 1564-1616.		
Le marchand de Venise, comedie traduite de l'anglais de Shakespeare [sic].		
ESTC No.	N34780	
Author	Shakespeare, William, 1564-1616.	
Uniform title	Merchant of Venice. French	
Title	Le marchand de Venise, comedie traduite de l'anglais de Shakespeare [sic].	
Imprint	Londres [i.e. Paris?] : et se trouve a Paris, chez Grangé. De La Lain[.] Valade, 1768.	
Physical description	6,[2],125,[1]p. ; 8°.	
Notes	With a half-title. Probably printed in Paris.	
Local note	Period after "Lalain" in imprint added by cataloguer for clarity. L have [2],6,[2]..., with the initial [2] being the half-title. ESTC/NA queried, 11/05.	
Place	France Paris.	
Digital reproductions	Google Books (Source Library: eMUbssb)	
Holding information		
United Kingdom, Crown Dependencies and Ireland	British Library , London, England, United Kingdom: RB.23.a.28652(4) Verified Copy, Cataloguer	
Europe	Bayerische Staatsbibliothek , Munich, Germany Verified Copy, Cataloguer Bibliothèque de la Sorbonne , Paris, France, France: LE a theta 217 in 8° Verified Copy, Cataloguer Staatsbibliothek zu Berlin - Preussischer Kulturbesitz , Berlin, Germany, Germany: 3 an: 32 ZZ 432 Provenance: supralibros on front cover: coat of arms of Louisa Ulrika of Prussia; supralibros on back cover: monogram of Sophia Albertina, Abbess of Quedlinburg Verified Copy, Cataloguer New York Public Library , New York, New York, United States: Drexel 5739.5 Verified Copy, Cataloguer University of California, Los Angeles, William Andrews Clark Memorial Library , Los Angeles, California, United States: Temp. rare Primary Copy	
North America		

ADVANCED SEARCH

For more detailed search guidance and tips, have a look at the ESTC Search Guidance document here:

[https://www.cerl.org/ media/resources/cerl search guidance.pdf](https://www.cerl.org/media/resources/cerl_search_guidance.pdf)



THE ART OF MATCHING

Match to the ESTC record when your item corresponds **exactly** in the following ways:

- ∞ The title page matches in every way, including spelling, punctuation, spacing, etc.
- ∞ The edition is the same
- ∞ The imprint is the same
- ∞ The pagination is the same
- ∞ The format is the same
- ∞ The notes all apply to the copy in hand

WEB MATCHING

Please, use the contact form that is accessible from the full ESTC record display or contact us at estcfeedback@bl.uk 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
- ∞ There is more than one record to which your copy could match. An additional note is needed to further differentiate the records.

WEB MATCHING

Don't Match

Everything matches in the title, imprint, and pagination, **but** the notes do not describe the book in hand (i.e. the notes describe another edition or a variant)

Don't match

Send images and a report for a new record to estcreports@bl.uk
(see the [ESTC Contributor page](#) for more information)



WEB MATCHING

Don't Match

Something looks weird

Don't match.

Use the contact form that is accessible from the full ESTC record display or contact us at estcfeedback@bl.uk so we can fix the problem or answer your question(s).

**WHEN IN DOUBT, DON'T MATCH,
ASK QUESTIONS.**

WEB MATCHING

Don't Match

Never match to these records as we need more information about them before cataloguing:

- ∞ *Unedited Records*
- ∞ *Partial Records*
- ∞ *Place-holder Records*

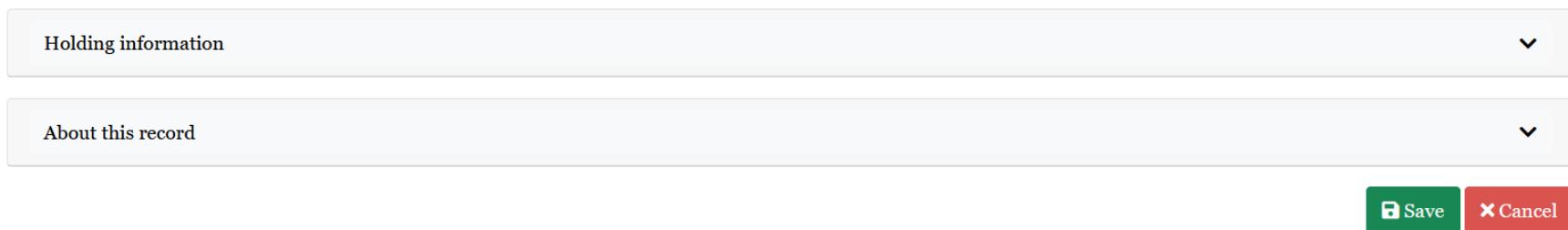
Each of these records will have a note stating the type of record it is

In each case, please contact us (estcfeedback@bl.uk) and we will update the record

ADDING YOUR HOLDINGS

Once you have identified the correct ESTC record you are ready to add your holding to the record:

- ☞ Click on **+ Create new Copy** at the bottom of the expanded ESTC record and you will see the following:



A screenshot of a user interface for adding a new copy. At the top, there are two dropdown menus: 'Holding information' and 'About this record', each with a downward arrow icon. Below these is a button bar with a green 'Save' button and a red 'Cancel' button.

- ☞ Click on the “Holding information” section drop-down to add your information
- ☞ Feel free to add as much copy-specific information as you like

ADDING YOUR HOLDINGS

- In the “Holding Status” field, choose the first option “Verified Copy, Contributor”:

Holding information

ESTC ID	S117270
Lib Code	bL
Shelfmark	
Holding Status	Verified Copy, Contributor
Copynote	
Provenance	
Serial issues held	

About this record

Save Cancel

Important: please, make sure that you either **save or cancel** the new holdings record by clicking on the respective button at the end. If you have changed your mind and you don't want to create a holding, please, select “**Cancel**” rather than clicking on the back button in your browser as otherwise the bib. record might get locked. When you select “**Cancel**,” there is a pop-up that asks you whether you really want to quit editing the record and which you need to **acknowledge**.

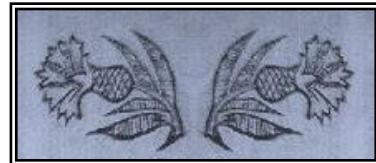
DELETING YOUR HOLDINGS

- ❖ You won't be able to delete any existing holdings yourself
- ❖ If a holding needs deleting, please, send an email to estcfeedback@bl.uk and we will either delete it or if it is a Wing or STC holding that is listed in the printed catalogues amend it accordingly.

REPORTING A NEW ITEM

Once you have determined you have a new item for ESTC, go to the Contributor webpage for information on reporting:

<https://www.cerl.org/resources/estc/contributing>



INFORMATION

For technical help contact:

estcaccounts@bl.uk

For cataloguing help contact:

estcfeedback@bl.uk

For general ESTC enquiries contact:

estc@bl.uk

ESTC website:

<https://datb.cerl.org/estc>

ESTC Libraries database:

https://datb.cerl.org/estc_libraries

Log In page:

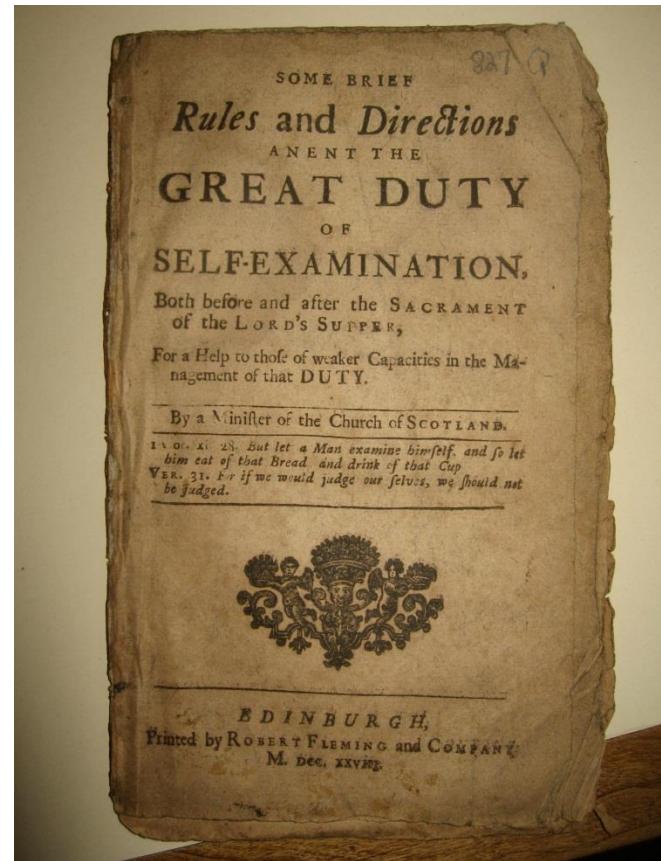
https://datb.cerl.org/_login/estc

Contributor page

<https://www.cerl.org/resources/estc/contributing>

Search guidance:

https://www.cerl.org/_media/resources/cerl_search_guidance.pdf



A FINAL NOTE

Thank you for participating in the creation and maintenance of ESTC. Your efforts provide additional resources and information for scholars throughout the world.

