

Copy Cataloging Policies

Copy cataloging is the process of using an existing bibliographic record, either in the PINES database or the OCLC WorldCat database (OCLC hereafter), for an item in hand. Editing is restricted to corrections and additions to the information in the record. Bibliographic records should not be edited to force a match.

In PINES, there are two types of copy cataloging:

Existing records in the PINES database: when [CAT1](#) or [CAT2](#) catalogers discover and use a matching record within the PINES database to attach their library holdings. CAT1 catalogers can edit the bibliographic record for missing or incorrect information, following PINES cataloging specifications.

Existing records in OCLC: when there is no matching bibliographic in the PINES database the CAT1 cataloger searches and discovers a matching existing record in OCLC and imports it into the PINES database. The record can also be edited for missing or incorrect information, preferably in OCLC for those accordingly trained.

For both types, after the matching record is identified and imported into the PINES database, if necessary, catalogers then attach library holdings to the record in PINES.

More information on CAT1 and CAT2 duties and responsibilities is at [PINES Cataloging and Catalogers: definitions and requirements](#).

For more information on bibliographic record policies see [Bibliographic records in PINES: Sources, ownership, and other policies](#)

Bibliographic Matching Criteria for monographs: A Short Version

When searching PINES or OCLC for monographic bibliographic records, a record must be an exact match to the item being cataloged. A PINES cataloger must find an exact matching record for the item in hand either in PINES or OCLC. If a match is not found in either database, the cataloger should **NOT** bring in a near-match from OCLC and alter it to fit the description of the item in hand nor should a cataloger alter an existing record in the PINES database to match the item in hand. When in doubt as to whether a near-match bibliographic record is an actual match, please contact the PINES Cataloging Specialist or the PINES and Collaborative Projects Manager.

For detailed field-by-field matching, see:

[Field guidelines](#) in PINES copy cataloging procedures.

OCLC's manual Section 4 "Section 4, [When to Input a New Record](#) in the [OCLC Bibliographic Formats](#)

and [Standards](#) manual.

Association for Library Collections & Technical Services. 2007. [Differences between, changes within guidelines on when to create a new record](#). Chicago, IL: Association for Library Collections & Technical Services.

When searching PINES or OCLC for monographic bibliographic records, the following basic criteria apply.

Type or format	If item is print, sound recording, visual material, etc. then the bibliographic record must match those characteristics.
Form	If item is large print, online, braille, microform, etc, then the bibliographic record must match those characteristics.
Language	Language of the item must match the language indicated in the record. Language of cataloging should be English.
Title	245 \$a must match preferred source of information, especially for books. For AV materials in particular, check 500 notes on sources of title information if titles in 245 fields differ slightly from the title on the piece in hand.
Editions statement	250 \$a must match apart from First ed. vs. no edition statement.
Place of publication	260/264 \$a should match in most cases; but, change of place within the same country between printings of the same edition and variation in choice of place for items with more than one place of publication is allowed. If more than one place of publication is involved, the FIRST place on your piece should match the first place in the record.
Publisher name	260/264 \$b should match in most cases, but change of publisher among parts of multipart item, variation in choice of publisher for an item having more than one publisher, and variation in choice of publisher when the publishers are part of the same organization (e.g. Puffin vs. Penguin) is allowed.
Date of publication, etc.	260/264 \$c must match unless the date is in brackets or with question marks.
Physical description - Extent	300 \$a should match; minor variations in paging if only difference; there are slightly varying styles of entry for multi-parts of on-going publications, use best judgment or ask for help if you are not sure.
Physical description - Other physical details	300 \$b must match for AV materials, but there may be slightly varying styles of entry.
Physical description - Dimensions	300 \$c must match for AV materials. For books, if the dimension varies by a few centimeters, and that is the only difference, consider it a match.
Series statements	490/8xxs \$a should match if present, but tracing can differ. Be aware of non-standard series statements.

Bibliographic Matching Criteria for Serials: A Short Version

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