

Existing Serials Searching and Matching Policy:

See [Section III, Part 8](#) of the [Linking Manual](#) for procedures related to this policy. See the [ILS Serials Policies](#) for policies related to serials issued more frequently than annually.

This policy only pertains to serial publications, not magazines that are received in the Periodicals module.

Required matching information

- Serial issued before 1995: Year and/or Volume in Title field; however, if [-1994] is in the Title field you may link your pre-1994 serial.
- Serial issued 1995 or later: Year and/or Volume in Title field.

Multi-part items

Multi-part title guidelines to be used to determine if a particular multi-part title should be circulated together or separately.

- Single-part annual, biennial, etc. and irregular serials (e.g. *Fodor's Europe*, *Christmas with Southern living*): Separate
- Multi-part annual, biennial, etc. and irregular serials (circulating and non-circulating):
 - Alphabetic arrangement (e.g. *Scholarships, fellowships and loans*): Together.
 - Non-alphabetic arrangement (e.g. *Scott standard postage stamp catalogue*, *UW Budget Redbook*): Separate.

History:

- ILS Committee, December 7, 2011
- Collection Maintenance Subcommittee, November 9, 2011
 - Amended by Collection Maintenance Subcommittee, November 9, 2016
 - Approved as amended by ILS Committee, December 7, 2016

Existing Books Searching and Matching Policy:

See [Section V, Books](#) of the [Linking Manual](#) for procedures related to this policy.

Required matching information

- Fiction books: Author, Title up to sub-title, Translator, Content, Illustrations and Illustrator(s) must match for children's books (match Illustrations and Illustrator(s) on adult books if illustrations are significant).
- Non-Fiction books: Author, Title up to sub-title, Translator, Edition. It is acceptable to link a paperback to a hardcover record if there is no doubt it is the same edition.

Unique formats and versions that require separate records

- Annotated and edited fiction titles: Fiction titles that are significantly annotated or edited should always match exactly, including publisher and publication date.
- Abridged editions and compilations: Abridged editions and compilations should always be linked to a record with the same publisher and publication date. Contents should match exactly.
- Large print: Publishers, publication date and page numbers do not need to match when linking to an existing large print record.
- Books with CD(s), DVD(s) or CD-ROM(s): Books that are available for purchase both as a book alone and as a book with an accompanying CD, DVD or CD-ROM (when the book is the primary item) should each get separate records.
- Board books, big board books, and big books: Each format requires a separate record. The publisher, publication date and page numbers do not need to match.
- Graphic novels: Graphic novels that read left to right and graphic novels that read right to left should each get separate records.
- Classic titles: There may be multiple records to choose from. Use the guidelines in the Linking manual to determine which record to link to or when to create a new BSE record.
- Early readers: Some picture books are re-published in an early reader format. The content may or may not be the same. However, a separate record for each format is required.

Multi-part items

Multi-part title guidelines to be used to determine if a particular multi-part title should be linked and/or circulated together or separately.

- Encyclopedias and encyclopedia-like titles (volumes with an alphabetic arrangement, both circulating and non-circulating): All volumes are linked on one bib record. Circulate as separate items. Optionally, link the first volume only if this is a reference title and will not circulate.
- Multi-part monograph (including Large Print and Braille items): Linked on separate bib records and circulated as separate items.
- Children's phonics books that are packaged as a set: Linked together on one bib record and circulated together as one item.

Source of matching information

- The title page is the chief source of information. The verso, spine and cover can be used as secondary sources of information or as the chief source in the absence of a title page.

History:

- ILS Committee, December 7, 2011
- Collection Maintenance Subcommittee, November 9, 2011
 - Amended by Collection Maintenance Subcommittee, September 9, 2015
 - Approved as amended by ILS Committee, October 7, 2015
 - Amended by Collection Maintenance Subcommittee, September 14, 2016
 - Approved as amended by ILS Committee, October 5, 2016

Proposed Changes to Books Searching and Matching Policy:

See [Section V, Books](#) of the [Linking Manual](#) for procedures related to this policy.

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- Non-Fiction books: Author, Title up to sub-title, Translator, Edition. It is acceptable to link a paperback to a hardcover record if there is no doubt it is the same edition.
- Serial publications (not magazines received in Serials module):
 - Serial issued before 1995: Year and/or Volume in Title field; however, if [-1994] is in the Title field you may link your pre-1994 serial.
 - Serial issued 1995 or later: Year and/or Volume in Title field.

Unique formats and versions that require separate records

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- Abridged editions and compilations: Abridged editions and compilations should always be linked to a record with the same publisher and publication date. Contents should match exactly.
- Large print: Publishers, publication date and page numbers do not need to match when linking to an existing large print record.
- Books with CD(s), DVD(s) or CD-ROM(s): Books that are available for purchase both as a book alone and as a book with an accompanying CD, DVD or CD-ROM (when the book is the primary item) should each get separate records.
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