

Non-MARC cataloguing

What you (and your organisation) need to know

Anne Welsh  0000-0002-5621-7490

Beginning Cataloguing

Received: 17 September 2025 | Published: 22 September 2025

ABSTRACT

A checklist to use as a starting point if and when you begin cataloguing in a system that does not use MARC.

KEYWORDS non-MARC systems

CONTACT Anne Welsh  anne@beginningcataloguing.com  Beginning Cataloguing

MARC, The Whole MARC, And Nothing But The MARC?

If your background is entirely in national and academic libraries, you might be forgiven for thinking that all library cataloguing is created in MARC 21 ([Library of Congress Network Development and MARC Standards Office, 1999-2025](#)), the latest English language iteration of the Machine Readable Cataloguing format, which was introduced in 1999 ([Library of Congress Network Development and MARC Standards Office, 1998](#)) and superseded UKMARC (1969-1999), USMARC (1965-1999) and CANMARC (1974-1999), the Australian library community having already moved from AUSMARC (which began in 1973) to USMARC in 1996 ([Chapman, 2005](#)). Indeed, the National Acquisitions Group's report *Quality of Shelf-ready Metadata* ([Booth, 2020](#)) and its following *NAG Servicing Guidelines* ([National Acquisitions Group, 2020](#)) and *Metadata Profiles* ([National Acquisitions Group and Southern Universities Purchasing Consortium, 2021](#)) focus on MARC.

As Emma Booth described in her Executive Summary, "The National Acquisitions Group Quality of Shelf-Ready Metadata Survey collected data from 50 Higher Education libraries in the UK and Ireland" with the majority reporting "that they receive shelf-ready MARC records for print and / or e-books from multiple Framework suppliers, rather than using one supplier. 70% receive records for print books and 90% for e-books" with lower percentages for other formats ([Booth, 2020](#), p. 5). Eric Jackson explained, "As pressures on academic libraries increase, both in terms of staffing and budget, they have become ever more reliant upon the acquisition of 'shelf-ready' materials" ([National Acquisitions Group, 2020](#), Introduction). Explaining the rationale behind the *NAG Servicing Guidelines*, he highlighted the cost reductions that follow

from libraries adopting the same processing requirements, asserting that “Complete or partial adoption of the standards can also feed into more streamlined internal workflows, freeing up library staff time for other duties.” With regard specifically to metadata, Booth described “a need for clearer standards regarding shelf-ready MARC records to be established, so that suppliers can work with libraries to ensure that the metadata in the supply chain is functional for a variety of discovery purposes, and *does not require each library to perform manual checking, correction or enrichment tasks*” (Booth, 2020, p. 5, my italics).

Share and Share Alike?

Indeed, this cuts right to the essence of why so many libraries have adopted MARC. If you share data, it is currently still the main show in town, though great strides are being made in the development of its successor BIBFRAME, both by the Library of Congress ([Library of Congress, 2025](#)) and others, including the Share Family¹, of which the British Library is a member ([British Library, 2023](#)). The National Library of Sweden is the first to transition entirely to BIBFRAME ([Breeding, 2024](#)), having begun the move in 2018, using open access software VuFind and FOLIO.

As described in their introduction, “The MARC formats are standards for the representation and communication of bibliographic and related information in machine-readable form” ([American Library Association ALCTS/LITA/RUSA Machine-Readable Bibliographic Information Committee and Library of Congress Network Development and MARC Standards Office, 1996](#), 1.1). Or in other words, “The MARC 21 formats are communication formats, *primarily designed to provide specifications for the exchange of bibliographic and related information between systems*” ([American Library Association ALCTS/LITA/RUSA Machine-Readable Bibliographic Information Committee and Library of Congress Network Development and MARC Standards Office, 1996](#), 2.1, my italics). They have become seemingly ubiquitous because institutions who wish to ingest, output and share their metadata can do so easily. Library suppliers provide metadata in MARC, so those who wish to purchase new materials shelf-ready can receive metadata at the same time. And despite the growth of ONIX as the standard within the publishing industry, we see more and more publishers providing MARC alongside their new publications.

Why Not MARC?

However, not all libraries have a clear and present business need to share their metadata. Sometimes cataloguers can be surprised that their organisation does not recognise a business case for MARC cataloguing, but managers may be correct in assessing their needs in this way:

1. MARC cataloguing presupposes a level of knowledge that staff already have and / or need training to acquire / keep up-to-date, so there is an inherent cost.

¹ <https://www.share-family.org/>

2. MARC is an exchange format. If your organization does not share metadata (neither importing nor exporting it), it is not making use of the main advantage of MARC.
3. MARC (and subsequent exchange formats, like BIBFRAME) is designed to allow for sophisticated nuances to differentiate between different editions, different translations, and different issues of serials. Smaller collections simply may not have the variations in stock that require such nuance.
4. Some libraries' holdings are mainly discovered via the library catalogue / discovery layer, but others are mainly discovered by browsing. Most school libraries, for example, are organised to be used mainly by readers who browse the shelves – they need a catalogue for inventory purposes and borrowing, but their users don't tend to Search, Find and Retrieve – they browse as their main form of discovery. Similarly, some law firms have embedded collections within different legal teams whose members get to know so intimately that cataloguing is really about inventory and stock control rather than discovery. There are other situations in which Search and Retrieval is not the primary task for users. (Remember, IFLA's "user tasks" are "generic" and but not *all* user tasks are).
5. Sometimes the library is not the biggest curatorial activity. An archive with a small book collection is more likely to acquire software designed primarily for archival description. A museum with a small book collection is likely to acquire software designed for museum description. Even where these have a "library module" or "book module" they may not use MARC. They may have been designed for use not by librarians but by archivists or museum curators who have to deal with books, and who may, therefore, be using terminology and even a mindset that is a little different from a library cataloguer.
6. Some organisations may believe that library management systems with MARC cataloguing are more expensive. It is true that the purchase price may be lower, but there may be hidden costs if you are locked into a proprietary cataloguing system that doesn't use a well-known exchange format (like MARC or one of the archival or museum exchange formats).

What does Your Organisation Need?

If you work in an organisation that neither imports nor exports metadata into a shared system (or from metadata vendors), there are four things it will benefit from you doing:

1. Being consistent in how you use the fields.
2. Checking how things display on the screen your users see, and in any reports they run.

3. Being aware of the potential for importing metadata should a need be seen to do so in future.
4. Being aware of how you will export your metadata if and when you need to move to another system.

This checklist, which I originally wrote as a free download to celebrate my fifth anniversary trading as Beginning Cataloguing, is designed to be helpful across these four needs.

What Do You Need?

In arriving in a situation in which you are not cataloguing in MARC, you will be one of four types of person:

1. Someone with a background in cataloguing, including MARC cataloguing
2. Someone with a library background, but no practical cataloguing experience
3. Someone with a background in a related profession (Archives / Museums / Galleries) with documentation experience (for manuscripts, digital archives, objects, digital objects) but no book cataloguing experience
4. Someone with no background in documentation or cataloguing

You are also likely to fall into one of three categories of ambition for your next job:

1. You want to move into or continue in metadata, including library metadata, and therefore including MARC cataloguing
2. You want to move into a position in which you manage someone who does the library cataloguing
3. You don't want anything to do with library cataloguing ever again – you just want to ensure you are doing the best you can for your organisation

The type of person you are and your category of ambition will determine the level of awareness of MARC cataloguing you need to acquire. For example, if you are an experienced MARC cataloguer, you would be best advised to maintain your level of awareness of MARC (and BIBFRAME) for your future career, so at entry point, you might want to ensure your organisation will support your training to do so (even though they don't see a need for MARC themselves, they do have a duty of care to you). However, if you have no MARC experience and no desire to be a MARC cataloguer, you might want to ensure your organisation will support you by ensuring someone with MARC knowledge is involved if you ever need to export or import your data.

The Checklist covers both these ends of the spectrum and everything in between, so choose from the Checklist based on what you know and what you want to know.

Note: This checklist shares some of the things that I check when I am working with a new client or an existing client obtains different software. It cannot be comprehensive of every small thing I have learned over 30+ years. It simply provides a basis for you to get started. DO add your own items based on your own experience.

Non-MARC Cataloguing Checklist

Item	Answer	Don't Know
Why doesn't your organisation use MARC?		
Is your management team aware of how they will export metadata from the system if they need to? (Some managers will say that they will never leave the system they have, but any system can cease to exist, so you always want to be able to get your metadata out, even if only in an emergency).		
Will your organisation support you in maintaining (or even acquiring) MARC knowledge, even though they don't catalogue in MARC?		
Will your organisation support you in acquiring (or maintaining) archival / museum documentation skills (e.g. if you are cataloguing a small book collection in a bigger archive or museum)?		
What (else) will your organisation do to support you in being ready for your next career move?		

Item	Yes	No	Don't Know
Is it an XML system?			
If Yes, does it use MARC/XML?			
If No, does it use an XML standard from Archives / Museums?			
Do the field names in your input screen use library terminology?			
If No, do they use terminology from Archives / Museums or from another general standard like DublinCore?			
Can you add new fields to the input screen?			
If yes, do they show up on the display that catalogue users see?			
If yes, do they look as you expect?			
Is there a Name Authority File built into the system (i.e. a picklist of names of authors, etc.)?			
If yes, what rules does it follow? (Archival, Museums, Library)?			
If it's set up using Archival or Museum style headings, will your adding library style headings mess up what the archival / museum documentation module(s) do(es)?			
Can you add a new name heading?			
If yes, how does it display in the catalogue display your users see?			
What happens if you enter a title starting with the definite ("The") or indefinite ("A(n)") article?			
Does the title display in the correct place alphabetically in the catalogue your users see?			
Does the title display in the correct place alphabetically in reports you and your colleagues may run (e.g. reading lists)?			
What field do you use to record where the book sits on the shelf?			

Item		Yes	No	Don't Know
If you use a Classification Scheme (e.g. Dewey Decimal Classification, Library of Congress Classification) does it appear on the display your users see in the way you expect / would like?				
If you use a Classification Scheme, can you run a report in the order of the Classification Scheme?				
	If yes, does it display in the order you expect / would like?			
If you use shelf marks, do they appear on the display your users see in the way you expect / would like?				
If you use shelf marks, can you run a report in shelf mark order?				
	If yes, does it display in the way you expect / would like?			
Whether you are using a Classification Scheme or shelf marks, do your entries interfere in any way with those input in the archival / museum module? (i.e. will it be clear to catalogue users that this item is a book and shelved with the books and not in the archive / museum)?				
Are there any fields governed by pick lists (e.g. publisher, place names, series)?				
	If yes, can you use the same ones the archive / museum documentation uses without any issues?			
	Can you add to these pick lists?			
Can you add series information?				
	If yes, do these appear in the display your users see in the way you expect / would like?			
Can you add edition information?				
	If yes, does it appear in the display your users see in the way you expect / would like?			
	If you keep old editions when the new one arrives, are you expected to create a new metadata set for each edition, or one metadata set that includes a list of all the older editions you hold in a holdings and / or notes field?			

Item		Yes	No	Don't Know
Can you add extent information and physical description in the way you expect / would like?				
	If yes, does it appear in the display your users see in the way you expect / would like?			
How are you expected to deal with serials? One metadata set with a start date (and a finish date if needed)?				
Is there a separate serials module or acquisitions module where you check in individual issues of serials?				
Is there a function to record when serials are expected and that flags up if one doesn't arrive?				
If you are cataloguing laws and treaties, are there special rules to follow?				
Can something have more than one title? (Some systems built for archives allow you to repeat the title field, rather than having a separate alternative title field as we do in libraries).				
Is there a subtitle field? (Some systems just have one field for all the title information)				
If there is more than one creator, do you repeat the field, or are there separate fields for co-creators (co-authors; added entries)?				
Are there separate notes fields for different types of note (e.g. binding, bound with, change of name of serial, etc.)?				
Are there any other fields specific to the book collection that you need to test? (ISBN? ISSN? Subject Headings? Abstract?)				
Can you export a set of metadata?				
	If yes, does it look as you expect?			
	If yes, can you put it into MarcEdit ² ?			
	If yes, does it look as you expect / would like?			
Can you export a range of metadata?				
	If yes, does it look as you expect?			
	If yes, can you put it into MarcEdit ² ?			
	If yes, does it look as you expect / would like?			

² <https://marcedit.reeset.net/downloads>

Item		Yes	No	Don't Know
Can you export all your metadata?				
	If yes, does it look as you expect?			
	If yes, can you put it into MarcEdit ² ?			
	If yes, does it look as you expect / would like?			
Can you import a set of metadata? (You can use MarcEdit ² to manipulate data and then import it).				
	If yes, does it look as you expect, and does the display your catalogue users see look as you expect?			
Does metadata created in MarcEdit ² and imported look better than metadata input directly into your system?				

References

- American Library Association ALCTS/LITA/RUSA Machine-Readable Bibliographic Information Committee and Library of Congress Network Development and MARC Standards Office (1996) *The MARC 21 Formats: Background and Principles*. Revised November 1996. Available at: <https://www.loc.gov/marc/96principl.html> [Accessed: 17 September 2025]
- Booth, Emma (2020) *Quality of Shelf-ready Metadata: Analysis of Survey Responses and Recommendations for Suppliers*. Available at: <https://nag.org.uk/wp-content/uploads/2022/03/NAG-Quality-of-Shelf-Ready-Metadata-Survey-Analysis-and-Recommendations-2021Corrected.pdf> [Accessed: 17 September 2025]
- Breeding, Marshall (2024) 'The National Library of Sweden Makes Strategic Decision to Implement a New Library Service Platform', Library Technology Guides Current News Service and Archive, 15 February. Available at: <https://librarytechnology.org/pr/29785/the-national-library-of-sweden-makes-strategic-decision-to-implement-a-new-library-service-platform> [Accessed: 17 September 2025]
- British Library (2023) 'Share Family: British National Bibliography (Beta) service is live', *British Library Digital Scholarship Blog*, 14 July Available at: <https://blogs.bl.uk/digital-scholarship/2023/07/share-family-british-national-bibliography.html> [Accessed: 17 September 2025]
- Chapman, Ann (2005) 'MARC Cataloguing Formats Worldwide', in *Bibliographic Management Factfile*. UKOLN. Available at: <https://www.ukoln.ac.uk/bib-man/factfile/cataloguing-formats/othermarc/index.html> [Accessed: 17 September 2025]
- Library of Congress (2025) *Bibliographic Framework Initiative*. Available at: <https://www.loc.gov/bibframe/> [Accessed: 17 September 2025]
- Library of Congress Network Development and MARC Standards Office (1998) *MARC 21: Harmonized USMARC and CAN/MARC*. Washington, D.C.: Library of Congress. Available at: <https://www.loc.gov/marc/annmarc21.html> [Accessed: 17 September 2025]

- Library of Congress Network Development and MARC Standards Office (1999-2025) *MARC 21 Format for Bibliographic Data*. Washington, D.C.: Library of Congress. Available at: <https://www.loc.gov/marc/bibliographic> [Accessed: 17 September 2025]
- National Acquisitions Group (2020) *NAG Servicing Guidelines: Best Practice for Academic Libraries*. 2nd edition. Available at: <https://nag.org.uk/wp-content/uploads/2021/04/Academic-Servicing-Guidelines-V2-Nov-2020.pdf> [Accessed: 17 September 2025]
- National Acquisitions Group and Southern Universities Purchasing Consortium (2021) *Metadata Profiles: MARC21 Records for Print and Electronic Books*. Available at: <https://nag.org.uk/wp-content/uploads/2021/07/NAG-SUPC-Metadata-Profiles-MARC21-Records-for-Print-Electronic-Books-v2.pdf> [Accessed: 17 September 2025]