# Non-MARC Cataloguing Checklist

This document accompanies Anne Welsh’s article *Non-MARC cataloguing: what you (and your organisation) need to know* published in Catalogue & Index 212 (2025) available at <https://journals.cilip.org.uk/catalogue-and-index/article/view/800>. It is provided in Word format to make it easier to use this checklist with one’s own additions. The copyright for sections also included in the article remain with Anne Welsh.

Please see Anne’s article in Catalogue & Index for an introduction to the checklist, who and what it is meant for and how it is meant to be used.

The checklist was originally made available by Anne Welsh (anne@beginningcataloguing.com), operating as Beginning Cataloguing, as a training resource. You can find out more about Anne at [beginningcataloguing.com](https://beginningcataloguing.com/) ; see where she is freelancing next [@beginningcataloguing on Instagram](https://www.instagram.com/beginningcataloguing/); and be the first to find out about more training opportunities at [beginningcataloguing.substack.com](https://beginningcataloguing.substack.com/). Anne is also on [LinkedIn @annewelsh](https://www.linkedin.com/in/annewelsh/).

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

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| --- | --- | --- |
| **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?  |  |  |  |
| 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? |  |  |  |
| 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 tile 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](https://marcedit.reeset.net/downloads)? |  |  |  |
|  | 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](https://marcedit.reeset.net/downloads)? |  |  |  |
|  | If yes, does it look as you expect / would like? |  |  |  |
| Can you export all your metadata? |  |  |  |
|  | If yes, does it look as you expect? |  |  |  |
|  | If yes, can you put it into [MarcEdit](https://marcedit.reeset.net/downloads)? |  |  |  |
|  | If yes, does it look as you expect / would like? |  |  |  |
| Can you import a set of metadata? (You can use [MarcEdit](https://marcedit.reeset.net/downloads) 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](https://marcedit.reeset.net/downloads) and imported look better than metadata input directly into your system? |  |  |  |