



# Leveraging Technology to Discover Finding Aids

By: Emily Calderon, **Beth Thompson**, & **Beth Breedlove**

## Abstract

In August 2020, the Cataloging Unit at Western Carolina University's Hunter Library implemented new tools and online workflows to add finding aids to the library's catalog. During remote work, catalogers utilized advanced tools in Connexion software, such as online constant data forms, text strings, macros, and batch exporting. They also incorporated online workflows with Microsoft OneNote, Planner, and Excel to organize and manage the project. Presenters will discuss the project, highlight specific fields used, and offer alternative tools and workflows for completing this project in public libraries.

Calderon, E., **Thompson, B.**, & **Breedlove, B.** (2021). *Leveraging Technology to Discover Finding Aids*. Poster presented at the 17<sup>th</sup> Annual Academic Library Services Paraprofessional Conference, online.  
[https://lib.ecu.edu/paraprofessional/poster2021\\_wednesday](https://lib.ecu.edu/paraprofessional/poster2021_wednesday)

Archived version from NC DOCKS available at: <http://libres.uncg.edu/ir/wcu/listing.aspx?styp=ti&id=35439>.



# Leveraging Technology to Discover Finding Aids

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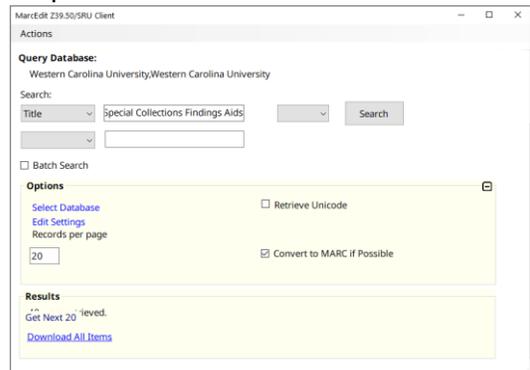
**First goal: To update Western Carolina University's over 400 finding aids records to RDA standard**

The unit enrolled in the eCourse *Original Cataloging of Archives Using RDA* hosted by Midwest Collaborative for Library Services to learn how to update the records following RDA standards

**Second goal: To add these finding aids records to WorldCat, making them discoverable worldwide.**

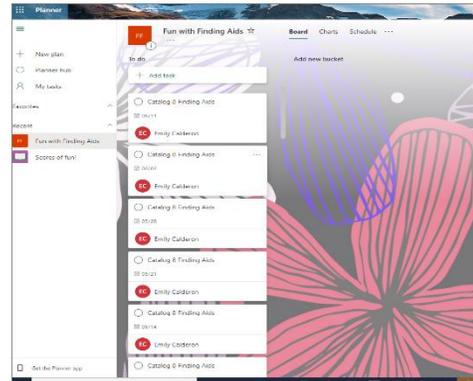
## Steps we took:

1. Using Z39.50/SRU Client in *MarcEdit*, we created a list of all the finding aids records in our catalog by searching the 730 MARC field for **WCU Special Collections Finding Aids**. We saved these records as a binary MARC file to our computer.

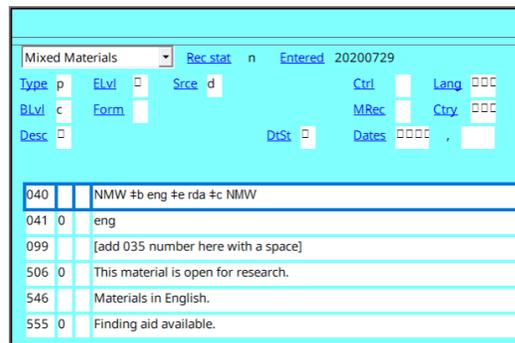


2. We imported these records into *Connexion* and saved them in a local save file. We used the *My Status* field to help organize records cataloged.

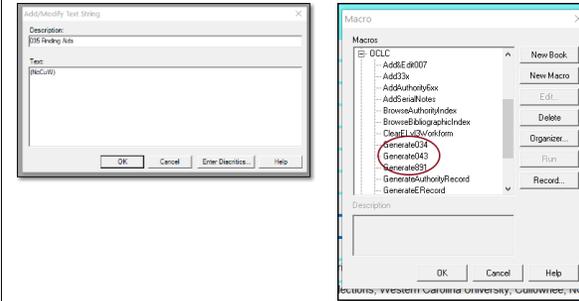
3. With over 400+ records to update and add to *WorldCat*, we used the project management software *Microsoft Planner* to set up a workable schedule to update every week.



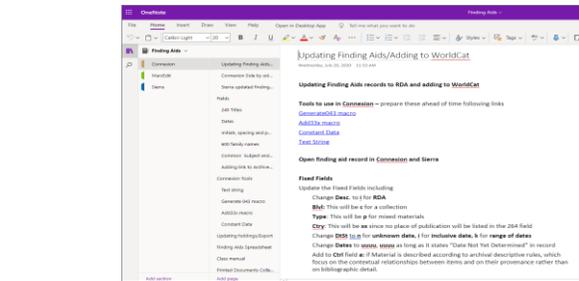
4. We used constant data in *Connexion* to add data and fields used in all records.



5. We used other tools in *Connexion* such as text strings and macros to help expedite the process.

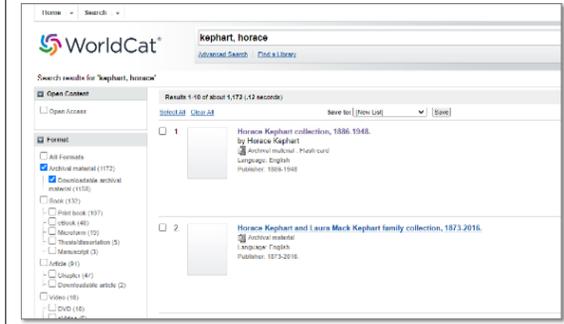


6. We used *OneNote* to keep our workflow examples and link to our *Excel* spreadsheet where we added our OCLC numbers once records were added to *WorldCat*



RECORD #	IBID/US	TITLE	AUTHOR	OCLC#	Notes	Digital Collection link added
6	106220834	A.L. Enslin Collection, 1949-1960	Enslin, A.L. (Abraham Lincoln), 1865-1948, photographer	119794929 EC		Yes
7	18233044	A.L. Prentiss, 1850-1971		120508045 BB		
8	18130728	A.W. Farmer Civil War Letters, 1863		1203987054 BB		
9	18212783	Agricultural Review, 1940-1940	North Carolina. Department of Agriculture, creator	120292030 BB		
10	1821279	Albert J. McCracken Papers, 1863-1865	McCracken, Albert J., creator	1200229818 BB		
11	18212771	Alda Turpin Nicholson Collection, 1798-1995		120309798 BB		
12	18212795	Allen High School, Asheville, N.C. Records, 1942-1942		120805205 BB		
13	18549702	Allen Turner (A.T.) Davidson Collection, 1850-1880		120206240 BB		
14	18549696	Allison Land Grant, 1795		119533233 EC		
15	18233451	Amos Brown Collection, 1882-1973		119553417 EC		
16	18212570	Amos Medford Collection, 1794-1955		1191841077 EC		Yes
17	18233463	Anderson/Johnson Masonic Letter, 1857	Anderson, Tho. W., creator	1191843856 EC		
18	18233475	Andrew Jackson Manuscript, 1830		1196374105 EC		
19	18550228	Andy's Wood Collection, 2006		119652282 EC		
20	18550250	Applegate Convocation Collection, 1957-1973		120206364 EC		

**Results from this project:**  
Our finding aids are discoverable in *WorldCat*



## Other Benefits

- We discovered hidden collections
- We got to know our digital collections better
- We made improvements to the subject headings and descriptions both in our ILS (*Sierra*) and in our CMS (*ArchivesSpace*)
- We added links to our digital collection records
- Greater collaboration between cataloging and special collections
- We improved our cataloging skills

## Optional free tools to use:

Project management software: [GQueues](#)  
Record editing: [MarcEdit](#)  
Subject and genre headings: [Library of Congress website](#); [AAT thesaurus](#) on the Getty Research Institute website