Catalog Records

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Create a Blank Record

You can create single or multiple blank records from the asset panel in your project. To begin:

1. In the upper right corner, use the gear menu and choose **Create new record(s)**.
2. **In the dialog box that opens, enter how many blank records you would like to create, then click Create records.**
3. The next dialog box will confirm the records have been created. You can choose:

- **Edit**: the new records will open in the edit tab where you can enter catalog data that will be applied to all the new records. See [cataloging multiple records](#) for help with this step.
- **Export to Excel**: a spreadsheet will be created containing the SSID for each new record. You may add catalog data and re-import this spreadsheet. See [create new records with Excel](#) for help with this step.
- **Close: close the dialog box and edit the records later.**

Catalog Data in a Single Record

To catalog or edit a single record:

Double-click the record within the asset panel to open the edit tab.

OR select an item in the asset panel, then click **Edit** from the **Selection Options** menu above.

OR select an item in the asset panel, then right-click and select **Edit** from the menu.

1. The record will open as a new edit tab, which shows the available cataloging screens and the fields of the default screen.
2. Select a cataloging screen by clicking the name of the screen above the fields.
3. Begin cataloging the data based on the available field types according to their labels. For example,

fields like Creator are likely to be linked, as indicated by the book icon in the text box. Click the book icon to search for and select a term from the available lists and authorities. If you are cataloging large blocks of text, use the pipe symbol to create line breaks in the published environment.
4. Continue cataloging the fields with data by using your mouse to place the cursor, or by using the tab key to move between fields. When you are finished editing the record, click **Save** or use control + S (command + S for Macs) to save the record.
5. If the record is ready for publishing, click the **Publish** button and then select **Options** to select the target collection(s) for making the record available to end users.
6. If you do not intend to publish the record yet, you may close the record by clicking **Save & Close**, or you can close the record without saving any changes by clicking the **X** in the corner of the tab.
7. If you do not want to close the record, you can use the arrows around the SSID at the top to move to the previous or next record.

Catalog Data in Multiple Records

To catalog or edit multiple records:

Select multiple records by holding shift, control, or command and clicking the desired records, then click **Edit** in the **Selection Options** menu.

OR select the desired records, then right-click and select Edit from the menu.

1. The records will open as a new bulk edit tab, which shows the available cataloging screens and the fields of the default screen. It will also display the thumbnail images and SSIDs from all the records you selected to edit where the image viewer normally appears on the right.
2. By default, values entered in the fields will be applied to all items you have selected to edit. If the records already contained text, fields that contain different data will show "Multiple values" in grey-text. Entering data in these fields will overwrite the data across all records.
3. You may edit individual items within bulk edit mode by selecting its thumbnail from the right. The text at the top of the tab will reflect the number of records you have selected to edit. To return to editing all records, click **Select all** found at the bottom of the media window.
   - *Bulk editing records with different values in Boolean type fields will default to **False** in the bulk display, but selecting and deselecting individual thumbnails will display the correct value for that single record.*
4. Select a cataloging screen by clicking the name of the screen above the fields.
5. Just as in cataloging a single record, begin cataloging the data based on the available field types according to their labels.
6. Continue cataloging the fields with data by using your mouse to place the cursor, or by using the tab key to move between fields. When you are finished editing the records, click **Save** or use control + S (command + S for Macs) to save the record.
7. If the records are ready for publishing, click the **Publish** button and then select **Options** to select the

target collection(s) for making the records available to end users.

If you do not intend to publish the records yet, you may close the records by clicking Save & Close, or you can close the records without saving any changes by clicking the X in the corner of the tab.

Clear Data in Multiple Records

To delete field data for multiple records in the bulk edit tab:

Select multiple records by holding shift, control, or command and clicking the desired records, then click **Edit** in the **Selection Options** menu.

OR select the desired records, then right-click and select Edit from the menu.

1. 1. The records will open to as new bulk edit tab.
2. 2. Input CLEAR into the field in which you want to delete the data, then select **Save** or **Save & Close**.

The field with CLEAR inputted will now have no data values in any of the edited records.

Edit All

You can catalog all the items in a project or set by selecting the project or set name in the left panel and then click Edit All in the Selection Options menu. Remember that any data entered where it shows "Multiple Values" greyed out in field will be overwritten if you type new data in the field. It's generally not recommended to use "Edit All" unless you are adding text to a new field, or correcting the text of a field that possesses the same data across records. It's also not recommended to use "Edit All" for publishing entire projects of records to a collection due to the lack of quality control.