Catalog with List Terms

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Once a list is [connected to either a list field or linked field](#), terms from the list can be selected from the list and added to your item records.

To use a list term:

1. While editing an item, click the lookup icon under the field name to access your list.
2. In the popup window, search the list of terms with a wildcard search. There is no partial search for terms, for example, when searching for "regal", typing "reg" will not return results.
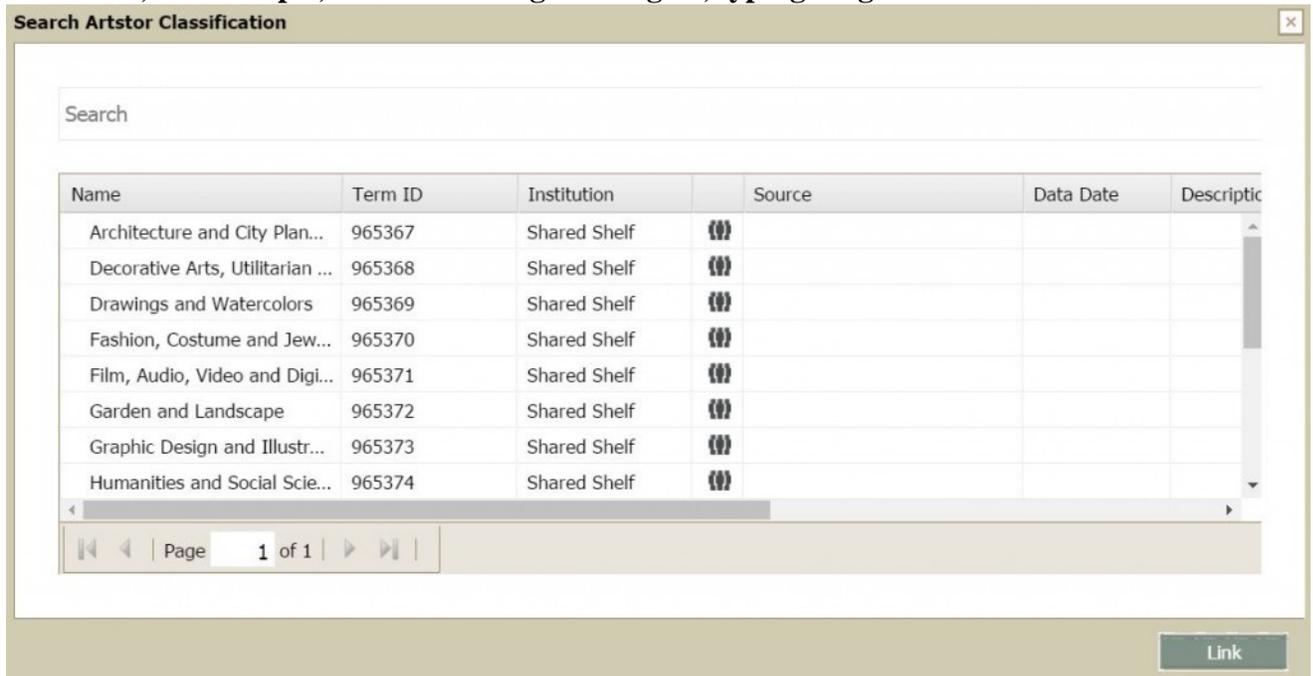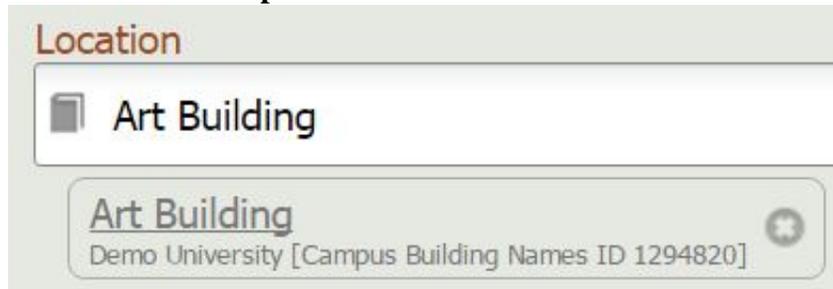

3. Select one or multiple terms to link. Use Control + click (Command + click for Mac) to select multiple terms.
4. After selecting your term(s), select Link. Your linked term(s) will now display in the field. If your field is a list field, then you will see the selected list term(s) only. If your field is a linked

field, you will see your list terms added as display text as well as linked terms below. You can optionally edit the display text for a linked field.

Example of a list field with term:

Artstor Classification

Architecture and City Planning
Shared Shelf [Artstor Classification ID 965367]

Example of a linked field with term:

Location

Art Building

Art Building
Demo University [Campus Building Names ID 1294820]

Add or Edit List Terms

Only users with permission to a list may add terms to that list. If you need to grant a user permission to a list so they can add and edit terms, see Permission Users to List**. Users that need to use list terms when cataloging do not need to be given permission to a list.**

To add or edit terms:

1. **In the Shared Shelf cataloging environment, select the Controlled Lists tab. In the left panel, you will see all of the lists you have permission to edit. If you do not see the Controlled Lists tab, you do not have any permissions to edit any lists. Contact your local Shared Shelf administrator or** support@sharedshelf.org **for assistance.**
2. **Select the relevant list, then click New Term.**

3. A new term tab will open and you can enter text into the main term field. *The main term field is a mandatory field (denoted with an asterisk) and must have a value before the term can be saved.* **If the term contains other fields, enter additional information.**
4. Select Save or Save & Close and your term will appear in the list and can now be used when cataloging. *All new terms are automatically assigned a Term ID and Institution ID (based on your institution).*

To edit an existing term:

1. Access the list in the Shared Shelf cataloging environment as described above.
2. Find and double-click on the term you wish to edit.
3. In the edit term tab, modify the information. The main term field (denoted with an asterisk) must have a value in order for the edit to save.
   - Propagation of Edited Terms: If edits are made to the main term, the new value will be propagated to all the records that use this controlled list term. This includes Display Records, List Records, Name Records, and Work Records. Changes to the Name and Work Records may result in additional propagation based on field behavior.
4. Select Save or Save & Close. Your edited term will appear in the list and can now be used when cataloging.

Add or Edit List Terms with Excel

You can bulk create new terms and edit existing terms using Excel. Similar to adding records to your project, adding values to your list uses an Excel template so the new values match the structure of the list.

To add or edit terms with Excel:

1. In the Shared Shelf cataloging environment, select the Controlled Lists tab. In the left panel,

you will see all of the lists you have permission to edit. If you do not see the Controlled Lists tab, you do not have any permissions to edit any lists. Contact your local Shared Shelf administrator or support@sharedshelf.org for assistance.

2. Select the relevant list then click the gear menu, then choose Excel>Export all terms or Export selected terms.
3. Open the Excel spreadsheet. Use the Term ID column to enter NEW for each new term you wish to import. Copy the value in Institution and paste it for each NEW row. You can leave the Level column blank. Add your new field values for the subsequent columns. You can also elect to edit your existing terms during this step as well, just be sure not to change the Term ID column. *Note: For subsequent updates of terms from an Excel spreadsheet, you cannot update the lists' Main Term value through Excel. Terms in this field will be omitted from the import and you will see this verified in the import messaging.*
4. Save the spreadsheet. Return to your project's list tab, and click the gear menu. Select Excel>Import terms.
5. Browse to select the edited spreadsheet and select Import. Your import status will be reported in the popup window. Click OK. The new terms will appear in your list.

Unlink and Delete List Terms

You will not be able to delete a term until all items using the term have been unlinked.

To unlink a term from an item:

1. Edit the item(s) using the term.
2. Navigate to the relevant field, then click the X in the term label. For a linked field type, this will not remove the value from the display text. You will need to additionally remove the term's display information.

3. Select Save or Save & Close.

To delete a term from a list:

1. In the Shared Shelf cataloging environment, select the Controlled Lists tab. In the left panel, you will see all of the lists you have permission to edit. If you do not see the Controlled Lists tab, you do not have any permissions to edit any lists. Contact your local Shared Shelf administrator

or support@sharedshelf.org **for assistance.**

2. **Select the relevant list, then select a single term.**

3. **Right click and select Delete. Or d**ouble click on the term to edit it. From the Options menu, select **Delete.**

4. **Confirm you wish to delete the selected term. After confirming, your term will be removed from the list.**