

# Create, Edit, and Delete Data Using Excel

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## Create New Records with Excel

Creating new records using Excel can be an efficient way to migrate from a previous system, or manage workflows in an offline capacity. Since this process recommends importing the data first, it's imperative to maintain the media filenames in the Filename field of the Excel spreadsheet. Once the data is added, uploading the media files follows. This allows Shared Shelf to use sophisticated tools built into the system to sync and match the media files with their corresponding data records.

*To import new records using Excel:*

1. Using the template you generated, in column A for Shared Shelf ID (**SSID**), type **NEW** in the row for each record you wish to create.
2. In column B for **Filename**, enter the filename of the corresponding media for the data. Note that the filename is case-sensitive, and the spelling and file extension must match the original media filename exactly. The filename column cannot support paths.
3. Catalog any other known data. For fields utilizing lists and linked authorities, see the article ([link to Excel and Specific Field Types](#)). Note that Excel does have a character limit of 32,767 characters in any single cell.
4. Save the file as an Excel spreadsheet or workbook (.XLS or .XLSX). CSV files are not yet supported.
5. In Shared Shelf, open the gear menu above the asset panel and select **Excel > Import records**.
6. Browse to the saved file on your hard drive and import the spreadsheet.
7. Shared Shelf will auto-generate and assign unique SSIDs for any records marked with NEW in the Excel spreadsheet. The new records will be marked with a placeholder image thumbnail, instead of the actual media file, in Shared Shelf.
8. Above the asset panel, click the **Upload** button and browse to your hard drive to find the corresponding media files. Upload the media in batches whenever possible.
  1. Since the media filenames and extensions had been entered in the **Filename** field column on the Excel spreadsheet, the filenames are already populated in the data. The system will find the filenames of the uploaded media files and match them to the correct SSID based on the data. The initial placeholder thumbnail will then be replaced by the intended media file.

*Important notes:*

- Recommended batch sizes are important to ensure successful imports of Excel data records.
  - Importing data with Getty links, recommended batch size is 5,000 records or less.
  - Importing data without Getty links, recommended batch size is 10,000 records or less.
  - Bulk editing existing records using Excel, recommended batch size is 10,000 records or less.
- When importing large data sets, it's recommended to perform this work during off-hours to ensure system stability.

## Export and Edit Data in Excel

*To export and edit all records in Excel:*

1. In the asset panel, click the gear menu in the top right and select **Excel > Export all records**.
2. A downloaded Excel spreadsheet will save to your hard drive to open and edit.
3. After edits have been made, save the file as an Excel spreadsheet or workbook (.XLS or .XLSX), as .CSV files are not yet supported.

*To export and edit selected records in Excel:*

1. Hold shift, control, or command and click to select the records in the asset panel you wish to export.
2. Click the gear menu in the top right and select **Excel > Export selected records**. OR right-click on the selected records and choose **Export selected records**.
3. A downloaded Excel spreadsheet will save to your hard drive to open and edit.
4. After edits have been made, save the file as an Excel spreadsheet or workbook (.XLS or .XLSX). CSV files are not yet supported.

*To import edited records using Excel:*

1. In the asset panel, click the gear menu in the top right and select **Excel > Import records**.
2. Browse to the saved Excel file on your hard drive and **Import**.

*Important notes:*

- Excel has a limit of 65,536 rows. Exceeding this number of exported records is likely to cause an error. We suggest using Sets or Saved Filters to export your data in batches less than 65,536 records.
- Excel has a limit of 32,767 characters in any single cell. Exporting or importing more than 32,767 characters in any cell is likely to cause an error with Excel.
- Maintain the column headings so the data can be imported back into Shared Shelf and mapped to the appropriate fields.
- The SSID column heading must be present in an import and remain unchanged. When importing an

edited Excel spreadsheet, do not change the values in the SSID column, unless you are creating new records, in which case you may replace the SSID with NEW.

- The filename column heading must be present in an import and, like all other column headings, must remain unchanged. Entering a filename, if one did not exist, will link the data record to the file when that media file is uploaded.

## Export and Delete Data in Excel

Data may be deleted from a Shared Shelf record in bulk by using Excel. Entering CLEAR in all capitals will trigger the system to clear the data from that field in one or more records upon import. Shared Shelf does not recognize blank cells as edits to an imported record.

*To clear field data:*

1. Select the record or records from which you wish to clear data, then use the gear menu and choose **Export > Export selected records**.
2. Open the Excel spreadsheet, and enter the text CLEAR into the appropriate cell(s) in your spreadsheet. The command is case sensitive.
3. Save the file as an Excel spreadsheet or workbook (.XLS or .XLSX). CSV files are not yet supported.
4. In Shared Shelf, click the gear menu above the asset panel and select **Excel > Import records**. Upon import, Shared Shelf will clear previously entered data from these fields in each modified record.

*Important notes:*

- The filenames of records can be cleared to make a bulk update of media files. Follow the steps, and then upon import, the Filename field will be cleared while the placeholder thumbnail will take the place of the original media file. Repeat the steps again, but replace CLEAR in the Excel with the new filename (sensitive to spelling, case, and file extension), and then import. Once the filenames populate in the data, upload the new media files to sync with the data records.
- Maintain the column headings so the data can be imported back into Shared Shelf and mapped to the appropriate fields.
- The SSID column heading must be present in an import and remain unchanged. When importing an edited Excel spreadsheet, do not change the values in the SSID column, unless you are creating new records, in which case you may replace the SSID with NEW.
- The filename column heading must be present in an import and, like all other column headings, must remain unchanged. Entering a filename, if one did not exist, will link the data record to the file when that media file is uploaded.

## Excel Error Reporting

After your Excel spreadsheet has been imported, a window will appear displaying a list of the number of records modified and the number of newly created records. If any errors prevented the import of records, the error messaging will be displayed here. If multiple errors occurred for a single record, each error will be represented in its own line item at the bottom of the window, along with a description.

Reasons an import may fail include incorrect field IDs in the header, terms not matching to a list, or linked authorities not formatted correctly for import. Contact [support@sharedshelf.org](mailto:support@sharedshelf.org) if you have questions about Excel error reports.

To download and save this report, click **Download Errors**. OR to cancel the import, click **Cancel Import**.

- Downloading the report will reopen the spreadsheet in Excel and fields with errors will be highlighted in red.
- For fields using lists, nonconforming values that repeat in the spreadsheet are flagged once, but all instances must be corrected before attempting to re-import.
- If a Cataloger edits fields in the Excel spreadsheet which are read-only for their layout, the following error message will be displayed: “Read only fields detected during import. Any changes to read only fields have been discarded.”