

Manage Lists

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Shared Shelf institutional administrators can create lists of terms to assist in creating cataloged data that is granular and controlled. Lists can be simple single-field lists of terms or they can have multiple fields. It is even possible to nest lists within a single list (such as a list of academic departments nested in a list of building names). You can link multiple controlled lists to a single project field, or you can create a simple, single list for a single field. Any user with access to the project can use the list terms when cataloging records. However, users who are provisioned to the list can add terms and edit local terms. You can easily add a list to either a list field or linked field. When setting up a new list in a new project field, it is best to begin by creating the list first, then connecting it to a project field.

Create List

To create a list:

- 1. In the Shared Shelf Administrative Tools, click on the List Settings tab, then click New List.**
- 2. Enter a List Name and choose your institution from the Owner dropdown.**
- 3. Click Create.**
- 4. Click on the new list name from the left tab area, then click on the Fields tab.**
- 5. Click Add a field.**
- 6. Enter text for the Label, and choose a field type. Note: The first field created for a list will default as the Main Term field, which means the data in that field will be displayed and searched in the end-user environment. The other fields are viewable and searchable when catalogers are selecting terms, but will not appear in published environments. You can select which field is the Main Term field when you are working with your List Settings. For the Main Term field in your list, use only Text or Number field types.**
- 7. Optionally, enter a description for the field (this will appear as hover text for the list field), any default text you'd like to appear by default, and a position; click Create.**

To add additional fields to the list, repeat the process above. After you complete the process of setting up your list fields, you will need to add users to the list in order to add/edit/delete list terms.

Permission Users to List

Giving a user permission to a list means they will be able to [add, edit, and delete list terms](#). You do not need to permission users to the list in order for them to use list terms when cataloging in the project. Anyone with access to the project will be able to use the list terms.

To add a new user to the list so they can add, edit, and delete list terms:

1. In the Shared Shelf Administrative Tools, click on the List Settings tab and select the list to which you want to add users.
2. Click on the Permissions tab and click New.
3. From the dropdown, select a user to permission to the list. This means they'll be able to add, edit, and delete list terms. You don't need to permission users to the list in order for them to use list terms when cataloging in the project. Anyone with access to the project will be able to use the list terms. Add a new user to the list so they can add, edit, and delete list terms, then choose their role as Admin or Cataloger.
4. Click Create. Now you're ready to add the new list to your new or existing project fields.
5. You can remove permission to a list by selecting the user then selecting Delete. This will remove the user's access to edit a list's terms.

Add List to a New Field

There are two field types you can connect to lists: List fields and Linked fields.

- **List Field Type** - a list field will allow users to catalog with terms from a single list. This would be useful if you want the cataloged data to be restricted to only the terms in the list. For example, if you're cataloging photos of campus buildings and want catalogers to select the location from a controlled list of campus building names.
- **Linked Field Type** - a linked field will allow for users to select from more than one list, integrated vocabulary, or external vocabulary in a single field. This would be useful in a field with a broader scope, like subject, where catalogers may want to use terms from an external vocabulary, such as the Library of Congress Subject Headings, alongside a list of local subject terms.

Regardless of which field type you choose, remember to add the new field to a cataloging screen so the data is accessible.

To connect a list to a list field:

1. In the Shared Shelf Administrative Tools, under Project Settings, click your project name then select the Fields tab. Click Add a field.

2. Enter a label name and choose List Field as the field type.
3. From the List Selection dropdown, select the relevant list.
4. Optionally, you can enter a description for the new field and choose a position.
5. Click Create.

To connect a list to a linked field:

1. In the Shared Shelf Administrative Tools, under Project Settings, click your project name then select the Fields tab. Click Add a field.
2. Enter a label name and choose Linked Field as the field type.
3. Click Create.
4. Edit the field so more options will appear.
5. In the edit window, click the Edit sources button to select the authority sources.

Note: If you create a list field in your project settings, without linking it to an existing list, the end user will experience an inactive lookup icon (book icon that when clicking will not open a list window).

Add List to an Existing List

These steps assume your list has already been created following the steps outlined above.

There are two field types you can connect to lists: List fields and Linked fields.

- **List Field Type** - a list field will allow users to catalog with terms from a single list. This would be useful if you want the cataloged data to be restricted to only the terms in the list. For example, if you're cataloging photos of campus buildings and want catalogers to select the location from a controlled list of campus building names.
- **Linked Field Type** - a linked field will allow for users to select from more than one list, integrated vocabularies, or external vocabularies in a single field. This would be useful in a field with a broader scope, like subject, where catalogers may want to use terms from an external vocabulary, such as the Library of Congress Subject Headings, alongside a list of local subject terms.

If you are changing the field type for a field already containing data, follow [these steps](#) before making changes to the field type and linking to a new list.

Link a list to an existing field:

1. In the Shared Shelf Administrative Tools, under Project Settings, click your project name then select the Fields tab. Click on the field you wish to modify, then click Edit field.
 - If your field is a list field, use the dropdown at List Selection to choose your existing list

name.

- If your field is a linked field, click the **Edit Sources** button and check the relevant list from the list of external sources to draw upon. You may check multiple sources, including lists, to link to a single field.

2. Click **Save**.

If the field in your project was linked to a previous list, the link bubbles do not automatically change to reflect the new list name. In order to update the link bubbles, you will need to export and re-import the records for your project.

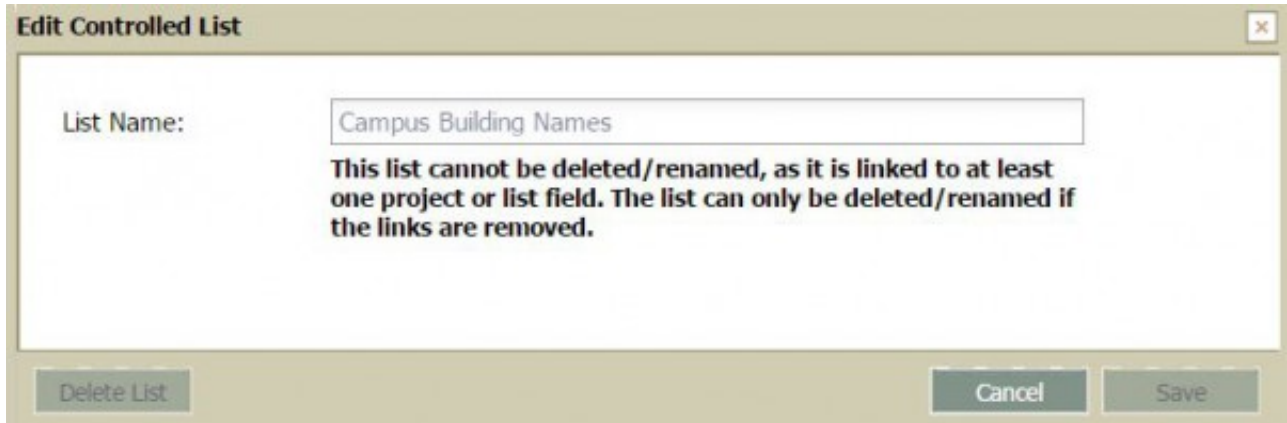
To update link bubbles to match newly connected list:

1. In your projects asset panel, use the gear menu, and choose **Excel> Export all records**. (note: if your project has over 65,534 records, you will need to break up your export into batches. An easy way to do this would be to use the filter in the SSID column to filter on a range of SSIDs that will be less than 65,534).
2. Save the file and then use the gear menu again and choose **Excel>Import records** to re-import the spreadsheet without any edits.
3. Browse to select the spreadsheet, and then click **Import**.
4. This will update the list term link bubbles for your display records.

Rename List

To rename a list:

1. Disconnect the list from all fields where it is currently connected. If your list is connected to multiple fields, in multiple projects, you will need to disconnect the list from every project.
 - To do this, you will need to export the data to Excel so the terms can be cleared from Shared Shelf. Follow the instructions in [Change a Field Type for a Field With Existing Data Using Excel](#) then proceed with these steps.
 - In the Shared Shelf Administrative Tools, navigate to each project and then field that is using the list. Edit the fields connected to the list to change the list selection drop to a different list or change the field type to a text field temporarily. This will allow you to proceed with the following steps. To disconnect the list from a linked field, edit the field and then uncheck the list name in the list of external sources. You may change all of these settings back after completing step 4 of these instructions.
2. In the Shared Shelf Administrative Tools, select the **List Settings Tab** and then the list you want to rename.
3. Select **Edit List**. If you have not disconnected this list from all fields, you will see the below message. If you receive this message, review the step 1 of these instructions to ensure the list has been disconnected from all projects.



4. If the list has been disconnected from all project fields, you will be able to proceed with renaming your list. Enter the new name of your list and save your changes.



5. Proceed with re-connecting your renamed list to all fields and projects so the list can be used.

Delete List

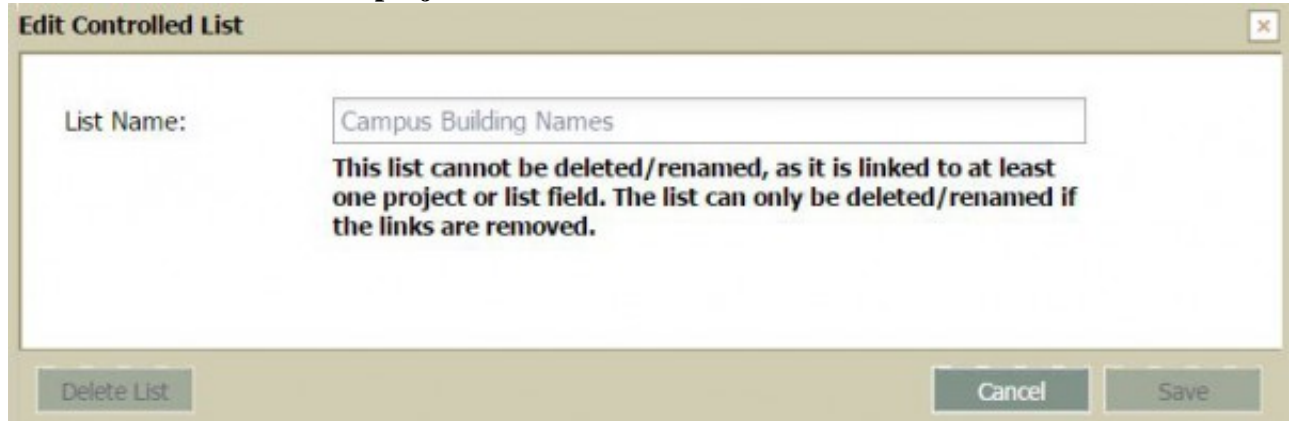
Similar to [deleting a project](#), you can delete your local lists. Deleting a list will delete all terms in the list.

To delete a list:

1. Disconnect the list from all fields where it is currently connected. If your list is connected to multiple fields, in multiple projects, you will need to disconnect the list in every project.
 - To do this, you will need to clear any values in any fields currently using this list. For more information about clearing values, see [Create, Edit, and Delete Data Using Excel](#).
 - In the Shared Shelf Administrative Tools, navigate to each project and then field that is using the list. Edit the fields connected to the list to change the list selection drop to a

different list or change the field type to a text field temporarily. This will allow you to proceed with the following steps. To disconnect the list from a linked field, edit the field and then uncheck the list name in the list of external sources. You may change all of these settings back after completing step 4 of these instructions.

2. In the Shared Shelf Administrative Tools, select the List Settings Tab and then the list you want to delete.
3. Select Edit List. If you have not disconnected this list from all fields, you will see the below message. If you receive this message, review the step 1 of these instructions to ensure the list has been disconnected from all projects.



Edit Controlled List

List Name:

This list cannot be deleted/renamed, as it is linked to at least one project or list field. The list can only be deleted/renamed if the links are removed.

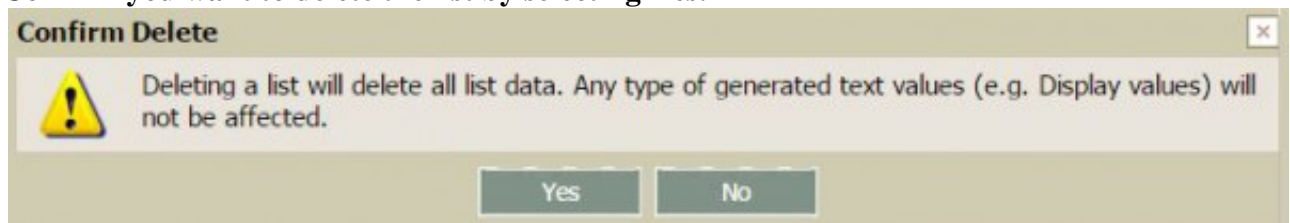
4. If the list has been disconnected from all project fields, you will be able to proceed with deleting your list. Select Delete List.




Edit Controlled List

List Name:

5. Confirm you want to delete the list by selecting Yes.



Confirm Delete

 Deleting a list will delete all list data. Any type of generated text values (e.g. Display values) will not be affected.

