

Manage User Access

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User Roles

Shared Shelf project administrators can manage user access to Shared Shelf projects in Shared Shelf Admin Tools by assigning a new user as either an Administrator or as a Cataloger. The difference between the two roles is below.

Administrators can review and delete all records in a project, see all cataloging screens created for a project, and publish to all targets. Administrators are also given access to all Lists.

Cataloger permissions can be granular. For example, project administrators can restrict the records a cataloger can access and/or edit by applying base filters, as well as limit what fields a cataloger can see and edit by assigning specific cataloging screens in which all or just a selection of fields are editable. Project administrators can also determine if a cataloger can publish to any or all of the publishing targets that have been created for the project.

Typically, a user who will be managing projects are assigned the role of Administrator. A user who will be assisting the administrator with editing data, uploading media, and publishing content are assigned the role of Cataloger.

	Administrator	Cataloger
Create Items	?	?
Delete All Items	?	
Delete Items They Create	?	?
Upload & Replace Media*	?	? Base filters can limit access to this.
Catalog Items*	?	? Base filters can limit access to this.
Access All Cataloging Screens*	?	

Add/Edit Shared Shelf Names	?	?
Suppress Items*	?	? Only from target collections to which user has right to publish.
Publish Items*	?	? Only to target collections to which user has right to publish.
Access All Sets & Filters*	?	
Access All Lists*	?	

*Cataloger can be granted additional permission to all, but still retain the Cataloger role.

User Scenarios

Departmental Student Works Project

User	User Roles	Cataloging Screens	Publishing Targets	Base Filter
Library Project Administrator	Admin	All	AWS & Omeka	n/a
Departmental Faculty Member	Cataloger	Faculty	Cannot Publish	Access to all records
Student	Cataloger	Image Data	Cannot Publish	Only records created by this user

Communications Marketing Project

User	User Roles	Cataloging Screens	Publishing Targets	Base Filter
Communications Department Project Administrator	Admin	All	n/a	n/a
Communications Department Assistant	Cataloger	Image Data	n/a	Access to all records

Faculty content for Architecture Department

User	User Roles	Cataloging Screens	Publishing Targets	Base Filter
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Instructional Technologist Faculty	Admin Cataloger	All Faculty Data	AWS Cannot Publish	n/a Only records created by this user
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Test User Permissions on Demo

If you would like to practice setting up users and test how their roles affect records and cataloging workflows, use the Demo environment to enable practice accounts. Once you have built your project on Demo, you can grant access to any catalogers you want to work in your project.

To add users to Demo:

1. Log in to Artstor Admin DEMO: <http://admin.library.demo.artstor.org/satools/admin.html>. If you have not been granted access to the Artstor Admin Tools on Demo, contact your Implementation Manager.
2. Follow the steps for provisioning a new user (link to Managing User Access > Provisions a New User), but test different scenarios with different accounts to see what works best for your workflows.
3. When you are ready to go Live, you may re-create these user permissions for meeting your workflow needs.

Provision a New User

First, you must verify there is an existing Artstor account for your user in the Artstor Administrative site. You will need to have access to your institution's Artstor Administrative site; contact [Shared Shelf Support](#) for assistance.

1. Log in to the Artstor Admin Site: <http://admin.artstor.org>
2. **If the user already registered for an Artstor account, click View and Edit User Accounts.**
3. **If the user has not registered for an Artstor account, click Register new users and follow the sequence for registering their Artstor account.**
4. Once they have an account, click **View and Edit user accounts.**

Statistics

141 Registered users	53 Users with personal collections
60 Users with instructor privileges	99 Active Users have accessed Artstor within the last 120 days
14 Users with folders	84 Shared Shelf users

For usage statistics go to the [Artstor Stats Site](#)

Folder Management

- » View and edit user folders
- » Create new folders
- » View archived folders

User Management

- » View and edit user accounts
- » Register new users

Manage your institution

Personal collections are **enabled**. Current default password for new users is **artstor1**.

To make changes, go to [Manage institution](#).

5. Search for their account by entering their email address.
6. Double-click on the email address in the account list to modify the user's details.
7. In the User Details window, check the Shared Shelf box to grant them access to Shared Shelf, and/or check the Shared Shelf Administrator privileges box if you want to give them access to the Shared Shelf Administrative Tools for building and managing projects.

User details
sara_student@artstor.org

» **Email user**

Remote log-in status:
32 of 120 days remaining
» **Extend access period by 30 days**

Account creation date: 12/28/2015
Last accessed date: 06/27/2016

ARCHIVE USER

Settings

Enable

- Instructor privileges**
Provides additional tools and features (folders, instructor notes, etc.).
- Personal Collections**
Allows user to upload images to their Artstor account.
- Shared Shelf**
Grant user access to Shared Shelf.
- Shared Shelf Administrator privileges**
Provides access to Shared Shelf Admin.
- Administrator privileges**
Provides access to admin.artstor.org.

Opt in

- Email communications about Artstor content and tools**
- Email invitation to surveys**

SAVE **Cancel**

8. Click **Save**, then close the dialog box by clicking the **X** in the upper right hand corner.

9. In another tab of your browser, return to the Shared Shelf Admin Tools and log in: <http://catalog.sharedshelf.artstor.org/admin.html>

10. Select the project, navigate to the **Permissions** tab, and then click **New**.

11. In the dialog window, select the user(s) to permission to the project from the drop down menu.

12. Choose their role(s); if the user is a cataloger, select the cataloging screens and targets to which they can publish, and determine the base filter, if required.

13. Click **Create**.

Provision a new user ✕

User to permission:

User's role:

User's cataloging screens: Work Full Item

User can publish to:

<input type="checkbox"/>	Publishing Target	Default
<input type="checkbox"/>	Architectural Studies Collection in the <i>ARTstor</i> Workspace	<input type="checkbox"/>

User's base filter:

Edit User Permissions

Within the Permissions tab of Shared Shelf Admin, you can quickly view the list of all users in your project and the restrictions placed on their account. You can also sort this list by their Name and Role by clicking on the column title. This is helpful when editing users and determine if their access has changed.

To edit access for a current user:

1. Select the project and navigate to the **Permissions** tab.
2. Select the account from the list, then click **Edit**.
3. In the edit permissions window, you can:
 - change their role by selecting a new role from the dropdown menu;
 - modify their access to cataloging screens;
 - add or remove targets to which they can publish.
 - **Click Save.**

Base Filters

When you create a new user or edit a current user with the Cataloger role, you have the option to restrict the records they can access and/or edit. This can be helpful when establishing a workflow where a cataloger can enter new records, but not edit those records after another user has made changes. Alternatively, you can restrict access for a particular cataloger to only have access to their own records and not those created by other users.

When viewing the permissions for a cataloger that has a base filter applied, you will see the restriction level listed in the column **Base Filter**.

- **All** means the user has access to all records in the project.
- **Created by** means they are restricted to seeing only records they created.
- **Exclusively Accessed** means the filter restricts them to see only records owned by this user account and never updated by anyone else.

To apply a base filter to a user account:

1. From the **Permissions** tab, add a new account, OR select the user account and choose **Edit** from the menu.
2. In the **User's base filter** drop down menu, choose one of the following options:
 - All records in the project (All)
 - Only records created by this user (Created by)
 - Only records owned by this user and never updated by anyone else (Exclusively Accessed)
3. Click **Create** or **Save**.

Provision a new user

User to permission:

User's role:

User's cataloging screens: Work Full Item

User can publish to:

<input type="checkbox"/>	Publishing Target	Default
<input type="checkbox"/>	Architectural Studies Collection in the ARTstor Workspace	<input type="checkbox"/>

User's base filter:

- All records in the project
- Only records created by this user.
- Only records owned by this user and never updated by anyone else.

Delete Users

In the Permissions tab, deleting a user does not delete their account or their access to Shared Shelf. It will only delete their access to the project. If you must delete a user from access Shared Shelf, this must be performed through the Artstor Admin Site.

To delete a user from a project:

1. Open your project in Shared Shelf Admin and click on the **Permissions** tab.
2. Select the user's account from the list, and then click **Delete**.

To delete a user from Shared Shelf:

1. Log in to the Artstor Admin Site: <http://admin.artstor.org>. You will need to have access to your institution's Artstor Administrative tools; contact Shared Shelf Support for assistance.
2. Search for the user's account by entering their email address.
3. Double-click on the email address in the account list to modify the user's details.

4. In the User Details window, uncheck the Shared Shelf box to remove their access to Shared Shelf, and/or uncheck the Shared Shelf Administrator privileges box if you want to remove their access to the Shared Shelf Administrative Tools.
5. Click **Save**, then close out of the dialog box by clicking the **X** in the upper right hand corner.

By removing the user from Shared Shelf, their account will no longer appear in any system-generated data for Created By, Updated By, and Published By, and it will instead display as “Unknown User”. It’s recommended that you do not remove the user’s access in order to maintain this information. However, if the user will no longer access Shared Shelf nor the Artstor Digital Library for any reason, you may archive their account in Artstor Admin so the system-generated data is maintained, but the account can not log in to either site.

To archive a user so they have no access to Shared Shelf or Artstor:

1. Log in to the Artstor Admin Site: <http://admin.artstor.org>.
2. Search for the user’s account by entering their email address.
3. Double-click on the email address in the account list to modify the user’s details.
4. In the User Details window, click the **Archive User** button, and confirm at the prompt.
5. Click **Save**, then close out of the dialog box by clicking the **X** in the upper right hand corner.

If you would like to view a list of archived users to make changes to their accounts, in the Artstor Admin, navigate to **User Accounts > View Archived Users**.