

Shared Shelf: Support

<http://support.sharedshelf.org>

Shared Shelf Overview

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Shared Shelf is a media management system that allows you to catalog, manage, and share your digital collections locally or broadly. You can upload your images, video, audio, and documents to Shared Shelf for adding descriptive data to make it searchable. The content you catalog can be published and shared with your institution through the Artstor Workspace, or open access through Shared Shelf Commons or online exhibitions through Omeka. Content can also be harvested from our OAI-PMH server to be used in a library discovery system or in another local discovery layer.

Cataloging Workflows

The Shared Shelf workflow uses tabs to access the project, item records, and some vocabularies.

The most standard of cataloging workflows is as follows:

1. Upload a media file.
2. Open the media file to an edit tab, catalog descriptive data, and save.
3. Publish to an available target for end users to discover.

Other, more involved workflows may vary based on your cataloging objectives. Follow these suggested workflows to find what works best for you and your team. Click the links to learn more about each step.

Workflow scenario: *Creating new records with identical data in one or more fields* ([Catalog Data in Multiple Records](#)).

1. Upload a selection of media files in bulk that will contain primarily identical descriptive data.
2. Select the newly created records in the asset panel and open to the bulk edit tab.
3. In the field(s) where the data is identical, enter the value(s).
4. Save and close the records.
5. To add information specific to a media asset, select that asset's record and open to the edit tab.
6. Catalog remaining data for that specific item and save the changes.
7. Select the thumbnails of all records in the bulk edit tab and apply a final save to the changes.
8. Click the Publish button and select the target destination for end users to discover.

Workflow scenario: *Using Master Record to apply identical descriptive data in one or more fields* ([Master Records](#)).

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1. Upload a media file, OR create a new, blank record.
2. Open the record to the edit tab and catalog descriptive data.
3. Save the record and then mark as Master.
4. Return to the project tab and upload several related media files that contain identical descriptive data.
5. Select the newly created records in the asset panel and open to the bulk edit tab.
6. In the field(s) where the data is identical, place your cursor and use the keyboard shortcut Control+D (or Command+D for Mac) to paste the value(s) for the selected field as copied from the Master Record.
7. Repeat for any relevant fields, OR place your cursor in any field and use the keyboard shortcut Control+E (or Command+E for Mac) to paste all fields copied from the Master Record, OR use the Options menu to choose Paste from Master.
8. Save the records and publish for end users to discover.

Workflow scenario: *Using Excel to migrate from your institution's previous system ([Create, Edit, and Delete Data Using Excel](#)).*

Using an Excel export of data from another system, you can modify the exported spreadsheet to align with Shared Shelf fields for easy importing of data first, followed by uploading of the media files to match.

1. Create an Excel template of your built Shared Shelf project.
2. Use the headers from your template spreadsheet to replace the headers of the Excel spreadsheet you exported from the local system, this is the map for your data when it enters Shared Shelf. (Note that column order is not significant.)
3. Enter NEW in the SSID column for each row.
4. Include exact filenames of the corresponding media files you will import.
5. Perform a clean-up of data as needed using Excel's many functionalities.
6. Incorporate linked vocabularies in the data wherever possible (Excel and Linked Fields).
7. Save a copy of the spreadsheet, so you don't overwrite the original document.
8. Import this modified spreadsheet to your Shared Shelf project.
9. Upload the corresponding media files and watch the system sync the data records with the images, audio, video, and document files.
10. Perform additional clean-up in Shared Shelf and save the changes.
11. Publish the records for end users to discover.

Project Building Workflow

The workflow for building projects in the Administrative Tools is relatively standard, but there may be variations as each project requires different metadata schemas, linked vocabularies, etc. Click the links to learn more about each step.

If you are interested in building a project that uses Works, please contact your Implementation Manager or

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<http://support.sharedshelf.org>
email support@sharedshelf.org.

The most standard of project building workflows is as follows:

1. Click New Project, and in the dialog window, enter your project's name, select the owning institution, and select a template option.
2. Once the project name is created, select it in the project panel and navigate to the Fields tab.
3. Add, edit, or delete fields to meet your custom metadata schema.
4. Change field types and labels, add linked vocabularies, lists, or default values.
5. When satisfied with the fields, navigate to the Cataloging Screens tab.
6. Add a new unique cataloging screen, and then add all the fields you would like available in this screen. (Note: Creating a "Full" or "Complete" screen is always recommended for project administrators to oversee all data in the project.)
7. When satisfied with the set-up of cataloging screens, navigate to the Targets tab.
8. Add a new target for publishing the records. Target types include Artstor Workspace for local discovery, Shared Shelf Commons for open access discovery, Artstor Workspace Personal Collection for a private project, Omeka for online exhibit building, and OAI for harvesting to other discovery layers (contact your implementation manager to set up an OAI target).
9. Establish the target's settings, including download settings for images, collection rights statement, collection description, and representative image.
10. Select the new target and click the Manage Mappings button to define the data's display when records are published.
 - a. Drag and drop your custom Shared Shelf fields to corresponding default target fields, or map to KVP for a customized display.
 - b. Save the changes and open the mappings window again to manage prepends, display, search, and required options.
11. When satisfied with adding targets, navigate to the Permissions tab.
12. Add new users as project administrators or catalogers, always adding yourself as an administrator.
 - a. If the users are not already registered, they should register to the Artstor Workspace, OR you may register them yourself as an Artstor Admin.
 - b. To establish catalogers, grant them access to specific cataloging screens, publishing targets (or no targets if preferred), and set up a base filter.
13. When satisfied with the permissions, open a new tab of your browser and log into the Shared Shelf catalog to review your project.
14. Continue to make changes to the project in the Shared Shelf Administrative Tools until you feel it is ready for adding content and publishing.

Basic Concepts

Project: A project is the top-level organizational unit in Shared Shelf through which [metadata schema are defined](#) and items are managed. Projects are also where publishing to end-user collections is setup. Shared

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Shelf can contain multiple projects. [Access to projects can be restricted](#) on a user by user basis. For example a student cataloger may only have access to a one project but a visual resources curator may have access to multiple projects.

Fields: Project fields are fully customizable through the [Administrative tool](#). Fields can be set up to allow free-text entries, controlled list values, numeric values, or they can be linked to authorities like Getty's Art & Architecture Thesaurus. Once established, the fields contain the data which describes your content and makes it searchable and retrievable to end users. Field access can be restricted to certain users as well as restricted in how the data may be entered by users.

Record: A record is container for all the fields, representing the data portion of an item or asset. A single record can be [linked to a single media file](#).

Media: A [media file](#) is the visual representation of an item in the format of an image, audio, video, PDF, Powerpoint, or document (Word, Excel) file. The storage utilized for a project is calculated based on the size of the media files uploaded to that project. Shared Shelf automatically creates derivatives for media files to be used throughout the system, (thumbnails, for example, are used in the grid view in the asset panel). Derivatives are not included in the calculation of your storage.

Item/Asset: An item or asset describes one media file and its corresponding metadata. Items are viewable in the assets panel when you select a project, and are [filterable](#), [searchable](#), [editable](#) and can be deleted from Shared Shelf or suppressed from publishing environments.

Set: A [set](#) is a user-created group of records that allows you to organize items within a Shared Shelf project. Personal sets are viewable only by you, though the content within the set may be viewable by others. Administrators can see all sets in a project. Shared sets are visible to all users that have access to the project. Deleting items within a set will remove them only from the set and not from the project.

Sharing through Publishing

You can easily share as much content as you like, through multiple [publishing options](#). You can publish directly to an institutional website where only recognized users can access your content, or you can publish your content to the world wide web using Shared Shelf Commons, or the Omeka platform. Additionally, publishing to Shared Shelf Commons or the Artstor Workspace allows your content to be searchable and discoverable alongside the Artstor Digital Library content. Options for media use and access vary depending on which environment to which you publish.