"Group Record" Creation in JSTOR Forum

The concept of a "Group Record" is a convention from OLIVIA, the former Harvard Library image cataloging tool. While JSTOR Forum allows the ability to relate Work Records as a group, there is no "Group Record" language in JSTOR Forum.

Primary use cases for creating a Group Record:

• Relate pages of an album when each page warrants its own Work Record. Example: http://id.lib.harvard.edu/images/olvgroup12436/catalog
  Note: The above cataloging approach is only one; cataloging an album as a single Work Record is sufficient for discovery and access.

• Make a Group Record of a finding aid folder to create a single HOLLIS Images permalink for use in ArchivesSpace
  Example: http://id.lib.harvard.edu/images/8001621571/catalog

Other potential use cases:

• Relate portions of complex works of art which would benefit from a group description
  • Altarpieces http://id.lib.harvard.edu/images/olvgroup12231/catalog
  • Large-scale modern installation works that involve distinct contributions from various artists http://id.lib.harvard.edu/images/olvgroup184/catalog
  • Frescoes http://id.lib.harvard.edu/images/olvgroup12156/catalog
Important to know about "Group Records"

• If you edit a Work Record that is part of a "Group Record", the "Group Record" must be republished for the edits to be reflected in the HOLLIS Images Group Record.

• In JSTOR Forum, the "Group Record" must have an associated item record to be published/re-published to our discovery systems

• It is recommended to use the lowercase "larger context for" or "part of" (the Shared Shelf/JSTOR Forum terms) to relate works. Use of these terms will automatically add the reciprocal relationship to related works. April 2021 updates to JSTOR Forum and how our discovery systems recognize group records has changed our recommendations for which terms to use to link the related works.

• Legacy "Group Records" may use the uppercase "Larger context for" or "Part of" (Harvard terms). Do not update legacy records to the Shared Shelf/JSTOR Forum "larger context for" or "part of" if the relationship is already established using the Harvard terms.
Choice of two workflows

**Workflow One: Adding "larger context for" relationship**
Use this workflow when creating a new "Group Record" for relating existing Work Records.

**Workflow Two: Adding "part of" relationship**
Use this workflow when creating or adding a new Work Record to an existing "Group Record."
Workflow One: Adding "larger context for" relationship

Use this workflow when creating a new "Group Record" for relating existing Work Records.
Create new "Group Record" in JSTOR Forum that will be used as the parent record for your group of Work Records.

All Work Records, including the "Group Record," must have associated item record to be published to our discovery systems.

**Required field for Group Records:**

*In the Record tab*
- Title

For originals held at Harvard, it is required to also include:

*In the Record tab*
- Repository and classification/accession information

**Recommended for originals at Harvard when applicable:**

*In the Local Info tab, Relationships section*
- Part of, Related Work, Collection title (this is for collection information, not group information)
- Blank relationship, Related Information, link to collection record (URL to finding aid or collection record in HOLLIS)

*Note that even if your Work Records have this information, the link will not work in the "Group Record."*
All "Group Records" must be associated with an Item Record. To create a new Item Record, click on “Add” and select “Create Blank Record”
After selecting to edit a blank Item Record, click on “Add Work Record”
Once you are in JSTOR Forum Work Records, select to create "New Work"
Add a title and any other information to the "Group Record"
All originals at Harvard must include repository information.
For originals at Harvard, it is also **recommended** to include collection information such as collection title and URL to finding aid/collection record.
Navigate to the Related Works tab in your "Group Record".

Add the Work Records you wish to relate. Relation Type must be linked as the Shared Shelf term **larger context for** (with the lowercase l). By using the Shared Shelf term, the reciprocal "part of" relation will automatically be added to the related Work(s).
Once you have added the Relation Type, add the Work Record you wish to relate. It is recommended to search by Work Record number to decrease chances of linking incorrect Work Record. Repeat for all Work Records to be included in the Group Record.
Once you have added all related Work Records, Link & Overwrite if you have not already. Otherwise, Save & Close.
Your records are now related in JSTOR Forum. You can navigate to the Work Records from the Related Works tab and confirm the reciprocal relation has been added.
Navigate back to your Item Record linked to the "Group Record."
1) Select Image Repository, 2) Image Classification Number or Image Accession Number, and 3) Double click on Send to Harvard. Repeat for all Item Records associated with the Work Records you related in your "Group Record."

Note: there is the option to "Export Only In Group" for "Group Records." When this is selected in ALL the corresponding Item Records, the related Word Records are only sent to Harvard discovery systems as a group. If this remains unchecked, Work Records will display both as a Work Record and within the "Group Record." See examples below for how search results display.

Double click on Send to Harvard.

Don’t forget to Publish! - this will prompt you to Save if you haven't already.
Workflow Two: Adding "part of" relationship

Use this workflow when creating or adding a new Work Record to an existing "Group Record."
Navigate to the Related Works tab in one of your Work Records

Add the "Group Record" you wish to link. Relation Type must be linked as the Shared Shelf term part of (with the lowercase l). By using the Shared Shelf term, the reciprocal "larger context for" relation will automatically be added to the "Group Record."
Once you have added the Relation Type, add the "Group Record" you wish to relate. It is recommended to search by record number to decrease chances of relating incorrect record. Repeat process for all Work Records you wish to relate to the "Group Record."
Your records are now related in JSTOR Forum. You can navigate to the "Group Record" from the Related Works tab and confirm the reciprocal relation has been added.
Navigate back to your Item Record linked to the "Group Record." Make sure you have an Image Repository selected and Image Classification number or Image Accession Number. Double click on Send to Harvard. Repeat for all Item Records associated with the Work Records you related in your "Group Record."

Double click on Send to Harvard.

Don’t forget to Publish! - this will prompt you to Save if you haven’t already.

Note: there is the option to "Export Only In Group" for "Group Records." When this is selected in ALL the corresponding Item Records, the related Word Records are only sent to Harvard discovery systems as a group. If this remains unchecked, Work Records will display both as a Work Record and within the "Group Record." See examples below for how search results display.
Group Record display in HOLLIS Images. Information for individual works is only visible after selecting an image or "View all component metadata."
Example of search results in **HOLLIS Images** for a Group Record *without* checking the "Export Only In Group" box.
Example of search results in **HOLLIS** for a Group Record *without* checking the "Export Only In Group" box.
Example of search results in **HOLLIS Images** for a Group Record with checking the "Export Only In Group" box.
Example of search results in **HOLLIS** for a Group Record with checking the "Export Only In Group" box.