Cataloging Working Group Notes

- November 16, 2016
- October 19, 2016
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November 16, 2016

Shared Shelf Cataloging Working Group notes, 11/16/2016

Present: Bill Connor (notes), Alix Reiskind, Joanne Donovan, Robert Burton

Absent: Robin Wendler, Maggie Hale

We met with Violet from Judaica and had a general discussion of Bulk editing and Reporting, new features for future releases of Shared Shelf.

**Bulk editing use cases and notes:**

Use case: Need to replace a subject term with another from a controlled list.

Question of whether the controlled vocabulary choice functionality would be available at the time of doing a bulk edit. Answer would appear to be no – would have to have id number of record available, or, at least, the exact form of the term for the replace. If using id number would the term appear as chosen from the vocabulary list as other subject terms would? (Assuming not possible?)

Note: If you replace an existing title, the display field will only auto-generate if the display field is set to “unedited mode”. In unedited mode the title within the display field will display in italics. Noted here that you won’t be able to see the title in the display field at the point of doing the bulk editing – so you won’t be able to tell if the bulk edit affects the display title in the work or not.

Noted: bulk editing functionality will be a two step process, involving remove and replace. But, records in the process will remain selected, so the search won’t have to proceed again after the remove is accomplished – can move ahead with replace.

We look forward to being able to test the bulk editing functionality and testing how useful it is.

We are disappointed that it will be generally available - not restricted to Admins - at its first release, with possible limiting to Admins only available at a later date. (see email from Karyn Anonia dated 11/16/2016). There is a danger that in the hands of the inexperienced the bulk-editing functionality could be problematic – changes to large groups of work records could happen, possibly resulting in errors affecting many records, including those beyond a single user’s respository. On the other hand, because the learning curve in using it will be steep, we would expect that actual use will be limited – hopefully limited to those who of us who will understand the implications of bulk edit. Training will be key to limit bulk editing to appropriate users and uses.

**Reporting use cases and notes**

Judaica project use case: Want to be able to report to donors what has been bought with their money in a quarter year or other time period. Donor information is in a note – key word search is used to find Donor information on display records. The records can be limited by date. Problem may come in with trying to create output of those records. If the number is too large it cannot be exported to Excel from Shared Shelf, due to Excel limitation on number of records. So the records can be found, but not output into a usable format.

As a comparative example, Violet mentioned Cognos Reporting which uses data extracted from Aleph and stored on a dedicated reporting server. Wonder about the applicability of something like this to Shared Shelf for large (exceeding excel’s capacity) sets of data.

Additional use cases:

Use case: Number of Display records created or modified by a user within a date range.
Use case: An intern is available to make edits on records – how many modifications are made within 3 months of work (probably best we can hope for is number of records modified.) Needed for Item (Display) records as well as for Works.

Use case: How many Item records are cataloged (i.e. linked to work records) and published to various targets (per project)?

Use case: How many item records don’t have media attached?

Use case: At Item level, report by source information – how many records were purchased from a certain vendor?

For all of these, it is possible to do searches within a project to ‘find’ the records – it’s not exactly a report though, as the number is just noted on the top of the screen. In these cases the report would need to be assembled by the operator. Are there ways in which these types of requests could be part of a system generated report? Is it necessary to do so?

The case where the set of items retrieved is greater than the capacity of excel to handle seems the most problematic (for “modest” sized sets exporting to excel is an option for reporting (i.e. sending out the records) – is there a way around this?

October 19, 2016

Shared Shelf Cataloging Working Group notes, 10/19/2016


Planning for Users group meeting on Monday, Oct. 31 10-11 AM

October 5, 2016

Shared Shelf Cataloging Working Group notes, 10/5/2016

1) Review of Works bulk editing wire frames, and Scheduling for a walk through with Megan and Karyn of the wire frames (see Karyn Anonia’s message from 10/4/2016). Possible time: Wednesday the 12th at 1:00? Need to check in with the group about availability. Wireframes meeting to be held Wed. the 12th.

2) Range searching: Karyn asks if we can confirm which projects and the specific fields that should be converted to the new range searching data type, which they decided to call “Alphanumeric”. Quality assurance is currently testing a script that would convert these fields to the new data type. QA wants to test the script on their cloud system. We have confirmed with Karyn the necessary field - primarily Image accession number in all Harvard projects using that field. (Many projects do not use that field.) Bill has sent list to Karyn.

3) Issue about searching for names – Robert uncovered an issue with the exact form of a Name as created in Shared Shelf not finding the Name on a subsequent search. Would like to look into this as a group. Bill did bring this up with Karyn and is awaiting more information from her. Found out that there is a bug in searching for names that include certain diacritics. To be fixed in later version.

4) Discussion of our support and training model for new users, such as those on the Charlie Hebdo project, and at Dumbarton Oaks. Are there ways we can improve this and make it better for the new users and those assisting them?

5) Additions to vocabularies. In OLIVIA we had documentation concerning the form of the terms, sources, etc. Do we need to revive this type of documentation on the Wiki? Bill will look into finding document and revising; will bring up at a later meeting.

6) Announcement about master record for work functionality. Joanne has put documentation on the Wiki – I think we need to craft an announcement about this to the users list.

September 21, 2016

Shared Shelf Cataloging Working Group Minutes

Present: Bill Connor (minutes), Alix Reiskind, Maggie Hale, Robin Wendler, Joanne Donovan
Absent: Robert Burton

1) Recap of Joint Artstor-Harvard meeting on Monday, Sept. 19

We discussed this meeting, which took place on Sept. 19. Karyn Anonia and Megan Marler of Artstor were present, and we have sent a response to them about the issues raised at the meeting. Here is a summary:

On Bulk Editing Functionality -- the Scripting functionality which is to be offered initially, instead of a graphic interface, is not user friendly. It may only be of use to the most experienced users who would face challenges in learning how to construct queries. We expressed the necessity for further work on this to make it user friendly. We also asked for a copy of the Harvard Functionality specification which Artstor developers seem to be using as a guide.

Further concerns on bulk editing include the inability to edit field group displays, and difficulty in supplying record id numbers rather than the terms to be changed. Our use cases include editing rights statements, being able to remove an Artstor category, data additions to any field, and adding and/or editing Name record.

Maintaining grid format of lists of item records. We expressed the importance of this, which is also supported by Megan and Karyn.

Desiderata additions related to working with records in bulk editing: being able to “select all” in a search result, being able to choose whether creating a set would automatically open the set or not. (Current behavior is that the newly created set opens automatically.)

We also noted that our use of Saved Filters (located just below Sets area on Display record page) has been limited and we'll explore using this more. It retains the parameters of a search, rather than making a set of records.

On Reporting Functionality -- We would like reporting to be institution-wide with also the ability to limit by project. Bill said he would set up a google doc to record use cases from Harvard users (this will come soon).

2) Bill raised a question about minimum fields required on the display record to trigger the proper appearance of display record info. in VIA. Robin said she would look into this.

3) Noting that documentation for Master Record for Work functionality has been added to the Wiki (Thanks Joanne!) See under Workflow: Copy & Paste for Works, and Sample Workflow for Copy & Paste for works. A general announcement to the users list should be made about this. (coming soon)

September 7, 2016

Shared Shelf Cataloging Working Group Minutes

Present: Robert Burton, Robin Wendler, Alix Reiskind, Joanne Donovan, Bill Connor (minutes)

Absent: Maggie Hale

1) Upcoming meeting with Artstor and Harvard Shared Shelf groups. Reminder about meeting with Artstor staff on Sept. 19, 1-4 PM, location tbd. Agenda not available yet but the meeting will focus on reviewing Shared Shelf development road map, latest version has been distributed to CWG members.

2) Phone discussion with Megan about accession number searching and bulk works creation. Robin and Bill had a phone meeting with Megan Marler (Artstor) about refining the specification for range searching for accession numbers. The three of us agreed that the requirements could be simplified. Additional set of search boxes not needed. “Or equal to” will be added to the operators; order of search boxes will change: lowest number at top, highest at bottom. We also discussed bulk creation of works functionality. We mentioned that it would be good to be allowed to add all created works to a set at point of creation. Also settled on a maximum number of works Harvard would like to be able to create at once: 300.

3) Robin had a separate phone meeting with development staff about other issues, as well as an email with some questions for consideration. Bill has forwarded this email to CWG for reference. Briefly, Artstor wanted assistance with naming the new field type for the range searchable acc.
4) AVES related work. Robin had received a proposal on how to handle geographics in AVES loads (CWG can see email forwarded from Robin Sept. 7, 2016 at 9:29 AM). It was determined that current practice of could continue: any geographics would just continue to get a dummy identifier and no text value would be added to Harvard's list of local places. Bill noted that Harvard geographics cannot be edited in the current Shared Shelf environment. If a geographic has a spelling or other error, then the only recourse is to create a new correct entry. In related email from Karyn at Artstor, she noted that "In the long term...We would move your local terms from TGN to (a) new controlled list, which means you could manage it like any other controlled list (e.g. edit terms, delete terms)." Timeline for this is pretty far out: "probably summer 2017."

Robin also indicated that a "cookbook" - probably in a wiki space - will be created to document AVES configuration and schema management, which has been difficult to track as yet.

5) Image restricted data issue. This was again discussed - the image restriction designation as it appears in Shared Shelf does not match the DRS image restriction (or non-restriction) flag. Shared Shelf QA is working on an enhancement to make the flag editable, and this is project to come with the 1.4 build in March 2017 timeframe (source: Sept. 7, 2016 forward from Robin). In the meantime, Joanne will forward ids for a couple of particularly problematic image restriction problems to Michael Vandermillen - with these they are supposed to be unrestricted, but appear in public systems as restricted. Michael should be able to adjust these in the OAI so they can be corrected.

6) We reviewed a couple VIA records on behalf of Robert, where a former owner was not showing up in the correct place. It was determined that the former owner needs to be linked in the Locations area of the Work record in Shared Shelf, which uses this standard in accordance with CCO (Cataloging Cultural Objects). So the name of the former owner will be linked in Locations, with the type Former owner. Then in VIA it will appear properly in the Associated Name area, rather than in Creator. (In the mapping of older records from OLIVIA to Shared Shelf, the correct practice to get former owners to appear in Associated Name was followed.)

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**August 24, 2016**

Shared Shelf Cataloging Working Group Minutes

Present: Robert Burton, Robin Wendler, Maggie Hale, Bill Connor (minutes)

Absent: Joanne Donovan, Alix Reiskind

1) Review of testing of version 1.3.1 cloud build. After release on the cloud site, we reviewed new features:

a) Addition of access to New Work and New Name directly from Display record screen. We decided the placement of these - to be made available under the small gear icon - was adequate. It was noted that the "gear" contains many key features and is small - we'll continue to suggest to Artstor that this be adjusted in some way.

b) Addition of functionality to create multiple works at once. We demoed this functionality. It was seen to be basically adequate. Bill had originally thought we should be able to create up to 1000 records at once, but in discussion it was decided a better upper limit was 300. We do not want to encourage the case of many extra works record being created but then not completed. There is no limit to how many times the function can be used, so catalogers can repeat as needed, and in many cases many fewer works need to be created. It was noted that having paste from master work available when using bulk creation would be useful. Bill has adjusted comment to "upper limit 300" on the R&D issues for Artstor. Additional desirable functionality, such as being able to link FROM a Work TO an Item record - the new term for Display record - was revealed in discussion of the multiple work functionality. Robin added these items to our growing desiderata list.

c) Range searching. The way Artstor has implemented this has several flaws, though in testing it basically worked. One major thing is that it requires creation of a new field to hold any numbers where we desire range searching, because the field "type" must be changed to a new type called "Two-part accession number." This would require data move en masse from one field to the new field - which is difficult. In testing on a small batch, Bill thought that the order of the search boxes should be rearranged so that the lower number would appear at top, and higher number at bottom. Also that "greater than or equal to" and "less than or equal to" searches would be better than "greater than" and "less than." This was also recorded in R&D issues for Artstor.

On Thursday (8/25/16) Robin and Bill will have a phone call with Artstor to discuss the results of our R&D testing particularly on the Range searching issues.

2) We briefly discussed a meeting Maggie and Bill attended with the team working on the Charlie Hebdo project. There were questions from cataloging staff assigned to it at 625. The project is at the point of getting images linked into Shared Shelf.

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**August 10, 2016**

Shared Shelf Cataloging Working Group Minutes

1) The group discussed the Annotated Road Map document concerning Shared Shelf development. Points covered by group: August 8 infrastructure upgrade, with solution to the annoying bug encountered when linking a name record to a display record. The system no longer
wipes out typing before allowing a name to be properly searched. Aug. 15 Patch release - no new features but bug fixes to make OIV (Offline Image Viewer) usable. Aug. 15. Release of the “Shared Shelf R&D” This research and development site where Harvard and other work record creating institutions can gain access to pre-release versions of Shared Shelf and participate in testing. Regarding this, it was decided that CWG would participate as much as possible in this testing, in order to ensure that enhancements will be useful to cataloging practice here.

Aug. 17. Shared shelf 1.3.1 available on R&D will have the following enhancements for testing: Direct links to name records and work records. Range searching for accession numbers. Bulk add for work records.

Sept. 9 Artstor Digital Library release. No new features. Bug fixes to make it functional

2) Restriction flag discrepancies in Shared Shelf versus in DRS. Problems have been noted. Will need to write up descriptions of cases.

3) Continued action item not yet accomplished: Write up of a procedure for deletion of assets and republication to VIA/Artstor/HOLLIS Plus.

July 27, 2016

Shared Shelf Working Group Meeting Minutes

Present: Bill Connor (chair, notes), Maggie Hale, Robert Burton, Robin Wendler, Alix Reiskind

1) We reviewed the recent visit from new Artstor president Kevin Guthrie and other staff from Artstor. The meeting was effective in beginning to establish the timeline in which we can expect our deferred functionalities to be executed. A Product Roadmap listing upcoming releases and the general time frame for the deferred functionalities has been released, but it needs to be fleshed out.

The deferred functionalities not yet implemented include bulk creation and eventual bulk editing of Work records, searching by alphanumeric ranges in appropriate fields, Sets for Work records, Automated batch linking, and user-level activity reports (statistics reporting).

The estimated date when all these functionalities are - at this point - supposed to be finished is by end of the 1st quarter of 2017.

2) One decision made at the meeting was to reconvene the Harvard Shared Shelf Steering Group. One current goal of this group is to provide higher level support for monitoring progress on deferred functionalities.

3) Also coming out of the 1st meeting of that Steering Group were suggestions for updating the Harvard Shared Shelf User support document, which describes how users of the system should seek help for various issues with Shared Shelf. The document will be revised soon.

4) Joanne Donovan and Bill Connor, as members of the Shared Shelf Advisory Group (a nation-wide body of Shared Shelf users who meet by webinar a few times a year to get updates and provide feedback about Shared Shelf to Artstor), attended a meeting by remote access earlier this month. Most of the meeting was devoted to various users (representatives of different colleges and universities), reporting on Shared Shelf use at their campuses. A portion was devoted to product roadmap updates, which paralleled the update given in number 1) of these notes.

5) Needs for training of new Harvard users were discussed. It was decided that at this point members of the Working Group will provide individual training to new users on an as-needed basis. We want to make sure training is specifically targeted to a repository’s particular use. We will also most likely provide training by a pair of Working Group members working with an individual or small group of new users who are about to embark on a new project. Please contact any working group member to discuss training needs.

6) Joanne went over possible updates to the Work form to create an even more streamlined workflow. Once we have agreed on a new look, we will submit to Artstor and see if they will be in agreement with our adjustments.

7) Robin agreed to review correspondence concerning an Artstor workspace publishing issue that has been affecting Fine Arts, which publishes to Artstor.

8) We need to write up a procedure for proper deletion of assets and republication to VIA/Artstor/HOLLIS Plus. Related to this, we need to check on proper deletion and republication to HOLLIS+.

April 20, 2016

Shared Shelf Working Group Meeting Minutes

Present: Bill Connor (chair, notes), Maggie Hale, Robert Burton, Joanne Donovan

Absent: Alix Reiskind, Robin Wendler
1) Discussion of Agenda for presentation at the Cataloging Discussion Group meeting on Friday, April 29, 12:30-2PM, Lamont Forum Room. Bill will present a brief history of the system development, give an overview of current use of the system (based on recent document developed for a meeting with ITHAKA), and will talk about some future intended enhancements. Joanne will discuss cataloging archival photos and using the batch loader. Joanne may use the cataloging photos document developed for training. Alix will finish by discussing her project to catalog aerial photographs, utilizing assistance from Shared Services catalogers.

Robert mentioned that Cataloging Discussion Group presentations have ranged from somewhat casual to more complex with powerpoints, etc. He also mentioned we may not want to completely rely on live demos, as internet access can be unreliable – a good idea to have at least some powerpoint slides.

Robert and Maggie indicated that they would also attend the Cataloging Discussion Group meeting.

2) We took a look at the Shared Shelf Wiki. https://wiki.harvard.edu/confluence/display/LibraryStaffDoc/Shared+Shelf

We noted that the formatting worked on by Alix and Joanne has been adjusted (not by a member of our group). Joanne said she would look into this. Bill indicated that he had updated the Wiki by adding the document stating the procedures Harvard catalogers should follow when reporting system slowness/downtime or asking for help. (This .doc was not available on the Wiki until yesterday when Bill updated it.)

3) We need to update the section of the Wiki titled “DRS / Shared Shelf Image Linking Workflow” with the information shared yesterday to the users list by Vanessa Venti – the information answering the question about single image linking that came through the list.

4) The idea of holding another Shared Shelf users group meeting came up. Although a specific date was not determined, we thought that early to mid-June would work.

We can determine the meeting time for this at the following meeting, which will be Wednesday, May 4 at 1:30-3:00 PM, Room 007, 90 Mt. Auburn St.

Nov. 18, 2015

Shared Shelf Cataloging Working Group Meeting Minutes

Present: Bill Conn (chair), Robert Burton, Maggie Hale, Clayton Scoble, Alix Reiskind

Absent: Robin Wendler, Joanne Donovan

1) Meeting minutes discussion. Would like to explore ideas for making minutes easier to produce. – We decided to try writing minutes in last 10 minutes of meeting following a suggestion from Clayton. We gave this a try for the current minutes and it seems to work ok, but we will see how this goes.

2) Shared Shelf User Advisory Group meeting (11/9/2015) highlights from Joanne:
   • There’s going to be a 1.2.1 patch release in November to deal with issues from 1.2 release
   • 1.3 will be released Dec/Jan and will include “improved work record” with a copy/paste capability. Not a template but maybe like a master record, not really clear; I asked what else was being improved and they said WR will be cleaned up with less visual clutter and responsive loading, improved points of access, switching to new framework that will load more quickly
   • Later builds will include: updating Getty vocabs regularly – halfway done with build for this, want feedback about what to do with terms Getty has “deleted”; Admin tool improvements; Interface improvements
   • Since bulk WR changes and sets for WR were not addressed in “later builds”, I asked about this and they said they were on the “roadmap” but no dates –
   • Also discussed a regional user group event in NYC and wondered if other areas would like to attend and/or host – I said “yes” to both
Discussion: Regarding the bulk editing and sets for Works: we need to get these items moved up in Artstor’s agenda as these are deferred functionalities. Need to get solid dates. Talk to Robin about how to get this done - involve Ann, Tracey?

There was also a question about how often Getty vocab get updated.

CWG talked about regional group meeting and agreed it could be productive. We can explore this at a later time, as we think it is a good idea.

3) Update on Short Shared Shelf Work form. Robin and I have been in communication with Artstor about this; I will show you where we are at present.

Bill showed the current spreadsheet of the short form for Works revision as imagined by Artstor, and reviewed the correspondence between Robin, Bill, and Xiaoli at Artstor. The short form for Harvard appears to be morphing into a more general short form that would work for all. Not what we expected. CWG preference remains for a form customized for Harvard --or a way for us and each other institution to customize their own form.

4) Any current bugs/workarounds. There was one uncovered at FAL, will explain and would like to see if there are more.

Bill explained recent FAL bug, involving failure to move from one display record to the next using arrow at top of the display record. Artstor has explored this and believes they have found the cause: linking more than one term from a controlled list to the linked work record. Temporary work around: unlink the Work from the Display record and relink it; this should allow movement to the next record. Bug should be fixed in an interim release around Thanksgiving weekend.

This brought up question of bug reporting. Did this one go to right place(s)? Should we make a point of getting bug info. out to all users in a better way? Maggie suggested tracking the bugs reported under our current guidelines and reviewing to make sure the system is working.

5) Talked about entry of Middle Eastern Division poster records in Shared Shelf. Topic as brought up by Robin in email:

“I met twice with Michael Hopper and Ali B. from the Middle Eastern Division about cataloging their ~6K posters. (I think Maggie had spoken with them previously.) They would want to supply Arabic script for at least some fields (Title, Agent, Location, possibly others). We haven’t exercised the Unicode capabilities in SS to that degree yet. So understanding more about 1) input options, 2) whether there is any way to include alternate script forms for Agents and Locations in the WR/DR, and 3) the whole Language block (Language/Script/Transliteration/Qualifier) in Description, Notes, etc., would be helpful. I have not researched SS help on these topics yet. But if the Language block is important to supporting alternate script forms, that might change our Work Short Form thinking.”

Should be able to test use of Arabic script now. Bill noted that Chinese character entry has been fine in Shared Shelf. It has been used primarily for Titles (building names) at FAL. Bill has a student who can experiment with input of Arabic. Entering alternate script forms for Agents should be fine – just need to specify what qualifiers to use. Bill noted sometimes Locations – if Place terms are what is meant – can have the problem of only being allowed to enter one form of the name. We need to discuss further with Robin about specifics, particularly the implications for the short form.

Oct. 21, 2015

Shared Shelf Cataloging Working Group

Meeting minutes

Attending: Bill Connor (Chair), Robin Wendler, Alix Reiskind, Clayton Scoble, Joanne Donovan, Robert Burton, Maggie Hale (notes)

1) Announcement on Artstor Shared Shelf Discussion list about release of Shared Shelf version 1.2. Release and related downtime was discussed. Bill will send announcement to local list on Thursday to be sure everyone is aware of the downtime on weekend of October 16, 17, 18. Release notes will follow. We do not know exactly what is being fixed, and whether the publishing issue is being addressed. We will wait and see what works and then follow up as necessary.
2) Upcoming visit by I Tatti folks. Bill has been contacted by Michael Rocke about a time to meet. Michael was also in touch with Robin and Robert. Bill will try to schedule a time when all can meet.

3) Randy and Michael will be invited to the November 18 CWG for discussion regarding putting SSIDs as an identifier into the DRS (simplified explanation). Michael will also be invited to the November 4 meeting to determine if the publishing issue was addressed by the most recent release.

4) Alix reported on the Access and Discovery Group’s approval of the Archives Space group as a Steering Group. Alix questioned whether we should now be a Steering Group as well, as Working Groups are for a set project with an end date, and we are now doing ongoing oversight rather than working on a specific project. There will be continued discussion of this question.

5) Joanne raised the question of broader use of the AVES loader and how requests for assistance from LTS are moved forward. Robin indicated that the best chance for getting something into the queue is to have a spec. CWG will work on specifying just what is needed.

6) Review of Post-Migration; Post-Implementation; and Shared Shelf Desiderata lists. Some items deleted (accomplished), other prioritized. Need to look into the status of deferred functionality. Content of cataloging wiki should be reviewed with plan to mothball this site.

   - Review of Shared Shelf Desiderata spreadsheet. google doc: https://docs.google.com/spreadsheets/d/1N-prvZ-KGSc1Sqdhl61zVI2N7ZIfiBATWitUM2_C-PNA/edit?pli=1#gid=0
   - Review of clean up issues/future tasks spreadsheet https://wiki.harvard.edu/confluence/display/k91481/Post-Migration+Cleanup

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**August 12, 2015**

Shared Shelf Cataloging Working Group

Meeting minutes


1) Display Record Discrepancy Issue. Outstanding issue that Artstor has asked for our feedback on. Please refer to email sent from Karen Anonia (below)

   Reviewed DR: 7399588 and saw issue Bill noted in emails to Artstor

   Two issues:

   1. More DRs on work than in SS – looked at examples sent by Artstor. This happens when a work has DRs from more than one repository, such as when FAL and GSD link DRs to same work. Hence, not an issue.

   2. More DRs in SS than on work – still an issue, but can only see discrepancy in work “Edit” mode

   Robin is writing up and sending response to Artstor & will ask to have conference call to discuss.

2) Publication issues.

   Still issues with some images not showing up in VIA vs. Artstor

   Still need to update work in order to get changes to DR to get published

   Robin suggested we create a log to keep track of errors & changes

3) Priorities for fall – including when (?) we can expect a version release of Shared Shelf, outstanding deferred functionalities, how best to communicate urgency of needs, are we going to offer a users meeting and/or training opportunities?

   Randy sent an email to Artstor asking for system status updates. Robin will follow-up and write to Bill Ying at Artstor to inquire about next release and what’s in it. Expect release to include fix re: problems publishing when updating or linking a new DR to a legacy record. Particularly interested in when “master work” record functionality will be implemented.

   Scheduled Fall User meeting on **Sept. 29 at 10am**. Note: new meeting time: Oct. 2 at 10am. Plan to welcome new repository & inquire about training for new users. Remind new users not to upload images directly

   Discussed need to work on User documentation

4) “Compound object display” plans for Artstor public catalogue. Bill attended a recent webinar
Artstor is developing capability to display compound objects similar to VIA but will also allow users to toggle back to see flat display.

Question about vocabulary search and what's displayed

5) Any additional items to discuss….

When adding documentation to Wiki – preference is to create child pages instead of documents that a user needs to download.

Karyn Anonia’s message about the Display Record Discrepancy Issue follows:

Dear all,

In regard to the display record discrepancy, Quality Assurance has been unable to reproduce this issue in their testing environment. They have however been able to ascertain that this discrepancy may in fact be a workflow issue especially if there are concurrent catalogers working on the same records in one project. They would like more information from you before proceeding with further testing.

1) Which way do your catalogers link or unlink display records to work records - using Excel ingestion or in a bulk edit while working in Shared Shelf?

2) How many display records are modified when either bulk editing or when ingesting Excel data during a normal day of work? 100 display records? 500 etc…

Partly the reason QA hasn’t been able to reproduce the display record discrepancy is because they do not know your daily workflow. I realize this may be different depending on the project, but since only three projects (Fine Arts Library DISC, Fine Arts Library SC and Graduate School of Design) are affected then we can focus on the workflow for those specific projects. Sample work records affected by the display record discrepancy from the three projects are listed below for your review.

Fine Arts Library DISC
8000567444
8000564528
8000535111

Fine Arts Library SC
8000183880
8000535522
8000535141

Graduate School of Design
8000567242
8000561408
8000564194

To the NewNab issue, QA believes that the issue with this peculiar data set in the Elevation field was a result of an Excel ingestion to link and unlink display records to work records back in April. QA believes that the NewNab data value was caused by a stray data entry which was imported during the Excel ingestion. NewNab did not cause the display record discrepancy, but the Excel ingestion occurred at the same time as the other records affected by the discrepancy issue. That said, to resolve this issue, QA recommends that your catalogers clear the NewNab data from the Elevation field by using Excel ingestion. For more information on using CLEAR, your catalogers can review this Shared Shelf Help site article, http://support.sharedshelf.org/?article=deleting-field-data-using-excel.

I am terribly sorry that this is taking so much time to resolve, but I do appreciate your patience. I look forward to hearing from you soon.

Kind regards,

Karyn