

# Checklists: A Guide to Learning Forum

## Useful Links

- Forum: <https://forum.jstor.org>
- Forum Admin: <https://forum.jstor.org/admin>
- Forum Support Site: <https://support.forum.jstor.org>

## Forum Checklist: Access and Training

- Gain access to start working in a project.
- Get trained by registering for a webinar or viewing an on demand training.
- Get to know the community by subscribing to the JSTOR Forum Discussion List.

## Forum Checklist: Cataloging

1. Watch our Cataloging Overview video.
2. Log into Forum.
3. Create and describe your content.
  - Create a blank record.
  - Catalog a single item.
  - Catalog or edit multiple items.
  - Catalog items using Master Records.
  - Use Excel to import new data, edit or delete existing data.
  - Edit all items in a project, set or saved filter.
4. Link terms using Getty vocabularies and local authorities when cataloging in your Forum project.
  - Link name authorities using ULAN and SSN.
  - View and link to AAT and TGN terms.
  - Catalog fields with your local terms by using Lists.

5. Manage your media.
  - Know Forum's supported file types and recommended batch size for media uploads.
  - View, upload and replace media files.
6. Facilitate cataloging workflows.
  - Try using sets and filters.
  - Set up your view in Forum.
7. Share your project items by publishing to your target collection and view them in Artstor, Omeka, or other end user environments.
  - Set a filter on your publishing activity to review the published items in the project item panel.
  - Suppress published items from displaying in your collections.
  - Use the publishing monitor to check status.

## Forum Checklist: Build a Project with Forum Admin

1. Log into Forum Admin.
2. Jumpstart project building.
  - Create a new project, using available templates to define a metadata schema.
  - Copy an existing project.
  - Also rename or delete a project.
3. Manage project fields.
  - Know the different project field types.
  - Add, edit or delete project fields.
  - Configure default values, read-only, and required fields.
  - Edit field descriptions.
  - Designate field position number.
4. Cataloging forms are used as the visual element to view and edit metadata in a Forum project. Review and manage the cataloging forms for any changes in the new project by using the following features.
  - Change cataloging form field labels.
  - Create read-only access.
  - Reorder or delete existing cataloging forms.
5. Watch our Publishing video.
6. Publishing targets are set-up to publish and share the content from Forum projects.
  - Create a target to Artstor.
  - Set up a target to an Artstor Personal Collection.

7. Other publishing target options
    - Create a target to a locally hosted Omeka.org site.
    - Create an OAI target for discovery vendors.
    - Contribute to the Digital Public Library of America.
  8. Use the following features to manage new and existing publishing targets.
    - Edit existing publishing targets.
    - Remove a publishing target.
    - Map project fields to the target's display fields.
    - Manage rights information for a collection.
  9. Manage user access.
    - Assign users a role.
    - Provision a new user by either confirming or creating an Artstor account; then add them to a project.
    - Edit a user's permissions.
    - Delete a user's access.
    - Set base filters to restrict access to specific project records.
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## Get in touch with your questions!

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