# Part 1 Agency manager roles & responsibilities

Anyone with level 3 security can see and manage agency screens in VITA as well as any action items. With different subscriptions come different options within agency management. The Basic screens are available to everyone, extra features are available to Regular, Plus and Newspaper subscribers. Use this guide to navigate to the features you want to manage according to your agency subscriber level.

# Part 2 Using VITA

# 2.1 Logging on to VITA

Access the login page at: <a href="https://data.vitatoolkit.ca/">https://data.vitatoolkit.ca/</a>

**Enter** your username and password **Login** 



**For users with multiple agency permissions**, the next screen offers up all those agencies in a linked list. Choose the agency to enter the main menu.

Using VITA Part 2







Reminder: VITA Toolkit Training available this week: March 26, 27, 28. Register here or see the VITA Toolkit Network for more information.

#### **Select Agency**

Please select the name of the agency whose records you plan to update.

- 1812 History
   Ajax Public Lin
- Barrie Public Lib
- Bibliothèque Publi La Nation
- Blind River Public Lib
- Brampton Library
- Brock University Archives
- Brockton Heritage Committee
- Burlington Historical Society
- Burlington Public Library
- Christie Historical Committee
- · City of Kawartha Lakes Public Library
- Club généalogique du Nipissing Ouest
- Cobourg Public Library
- · County of Brant Public Library
- Deseronto Archives
- Dunnville District Heritage Association
- Edinburgh Square Heritage and Cultural Centre

On the Main Menu, use the link to "Switch Agency"

#### Manage Records

#### Add Record:

- · and upload file
- · without a file
- as a Birth, Marriage or Death (BMD) er

#### Search or Update Record

- Prooflist [last added first, from the index
- . Top 100 Records [aka: the last 100 rec the database]
- · Record id:

go

Add/Edit Publication Add/Edit Issue

#### Manage Comments

Review Comments (0) **List All Comments** 

### Manage Groups

Add or Update Record Group Add Records to Groups

### Manage Application

Agency Management Site Management **Monthly Statistical Snapshot** 

Logout >> Switch Agency

Part 2 **Using VITA** 

## 2.2 Main menu

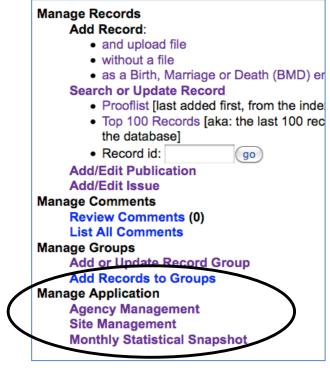
Once you click on the login button, you will be presented with the Main Menu.

On the right is an overview of your agency's records and interactive record information.

On the left is a selection of management options ranging from data entry and editing to agency management.

Only Level Three users are able to see the Manage Application options:

- Agency Management
- Site Management
- Monthly Statistical Snapshot



Only Site administrators (a security setting changed by OurDigitalWorld staff) can make changes to site management. See Site Administration manual.

**Note:** Main menu options will change according to subscriber plan.

Using VITA Part 2

## Part 3 Basic agency setup



What is an "Agency"? In VITA, an Agency is the person or organization that contributes material and is responsible for their collection of material and the records being uploaded onto a site.

Multiple agencies can display their collections through a mutual "site" in the public view. Similarly, one agency can contribute to multiple sites.

This section will discuss the Agency set up screens for **Basic Plan subscribers**.

## 3.1 Agency profile: Labels and addresses

The agency label and addresses screen is used to record and update the name, contact information, and web address for each agency that uses the VITA toolkit. A basic agency profile will be completed by Our Ontario staff during the set up process and can be edited by the site administrator once the subscription is activated. As well, the agency plan type and available modules are listed on this screen.

Training  19 Oct 2010 16:54:55  Training data set  Any changes to this field trigger changes to each record in your index, which make tak considerable amounts of time. Depending on server activity and the number of records this may be as little as five minutes or over an hour.  Others  Public: info@ourontario.ca  This address is displayed on each public record as part of the agency contact
Training data set  Any changes to this field trigger changes to each record in your index, which make tak considerable amounts of time. Depending on server activity and the number of records this may be as little as five minutes or over an hour.  Others  Public: info@ourontario.ca
Any changes to this field trigger changes to each record in your index, which make tak considerable amounts of time. Depending on server activity and the number of records this may be as little as five minutes or over an hour.  Others  Public: info@ourontario.ca
considerable amounts of time. Depending on server activity and the number of records this may be as little as five minutes or over an hour.  Others  Public: info@ourontario.ca
Public: info@ourontario.ca
information. It is vulnerable to spamming, but is a valuable link between users and you agency should they want to order copies of things or seek permission to use record and images in specific ways.  Feedback:
diane@mnsi.net
This address is <b>never</b> displayed on a public record. It is exclusively used to route emails that the software generates. For example, it will let you know that a new comment (and if you use Vita Plus, testimonial) has been submitted.
http://ourontario.ca/
Test
123 My Street Ave. City, Province WOW 1H0
135
OurOntario Training
Select a default site from those available above. This will be used to point to the public site from the data management pages. More importantly, it will be used in the export of data from this agency to other indexes like <b>OurOntario.ca</b> .  Any changes to this field trigger changes to each record in your index, which make take considerable amounts of time. Depending on server activity and the number of records this may be as little as five minutes or over an hour.
English
○ Français
Select language
Type: Basic Plan last modified: 11 Oct 2011 14:57:12  Modules: Web Pages: 0 (Agency "About" page) Testimonials: No Video: No Batch Templates: No Web crawler sitemaps: No Note on removing pages from Google: See Google's Webmaster Tools FAQ

**Agency code** and **setup date**: Both are hard coded during initial subscription set up.

**Agency name**: Can be changed by the Site administrator, but with the caveat that it is displayed on every record in the collection so triggering a re-index may take some time. Only change this field if absolutely necessary.

**Type**: indicates the kind of organization the agency is (i.e. Museum, Archives, Historical Society, etc.) and is assigned during set up.

**Agency email addresses – Public**: This address is displayed on each public record as part of the agency contact information. It is vulnerable to spamming, but is a valuable link between users and your agency i.e. should they want to order copies of images or seek permission to use records and images in specific ways.

**Agency email addresses – Feedback:** This address is **never** displayed on a public record. It is exclusively used to route emails that the software generates, e.g. new comments or contributions are submitted. Multiple email addresses can be entered if separated by a comma.

**Agency URL**: Exposed on every public record. Web address for organization's home page.

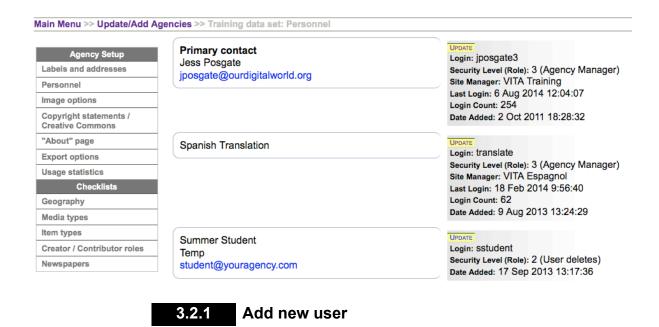
**Agency address:** Exposed on every public record. Mailing address for organization. **Record count:** Real-time number of records (public and non-public) contributed by the agency.

**Sites:** Linked name of the site(s) to which this agency contributes records. The selected site is the default view of the agency records, i.e. for previewing in Data Management and from OurOntario.ca portal. Note: Changing this triggers a substantial reindex of the agency's entire collection and may take some time. **Language of description**: Primary language used in descriptive records. **VITA plan:** shows the type of plan the agency subscribes to; modification dates of that subscription, and the available modules. These are assigned during initial set up.

### 3.2 Personnel

Agency managers can create, update and delete Personnel files. Site administrators are usually responsible for assigning user access and managing the personnel profiles for their VITA subscription. The site administrator for your agency will be designated during subscriber setup and their access to Site Management is assigned by Our Ontario staff. Talk to us to request changes to Site Admin personnel status.

The Personnel screen offers a list of all users assigned by your agency, and a snapshot of their status and activity. Click the Update button to change personnel file information (see 3.2.2).



At the bottom of the screen, use the Add user input boxes to open a new personnel file.



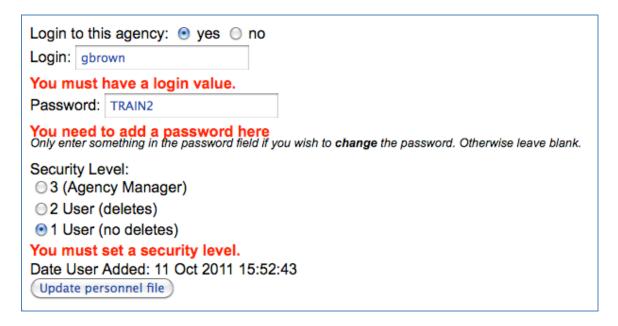
### Add/Update Personnel File

Use this screen to create a personnel file for your login users and non-login users. This helps us contact the right person at your organization (i.e. primary contact Yes/No) and ensures you have up to date information about your users at every level of the organization.

Add a new user by entering more contact information. If you want to assign a second email address, use a comma and space after the first email assigned to them.

Primary Contact: ○ yes ● no Name: George Brown	
Title: Volunteer	
Address: Line 1	
Line 2	
City/Town:	
Province/State	
Country:	
Postal Code:	
Telephone: 123-456-7890	
email: om, georgieboy@hotmail.com	(limit 100 chars)
Lasia ta this areas and O area O a	
Login to this agency: ● yes ○ n Date User Added: 11 Oct 2011 15	

When you click "Update personnel file" a second set of fields will appear.



**Login to this agency Yes/No:** CEOs, department heads, or other people in the organization may have influence or decision-making power about your VITA

subscription. These folks do not necessarily USE the toolkit (select "no"), but are pertinent to maintaining your subscription.

**Login:** Login name <u>must be unique</u>—enter first initial and last name **Generic usernames:** use an identifier to associate generic users with the agency, e.g. GHPLuser or TBPLuser instead of just "User"\*

**Password:** Passwords should be 6-8 characters including numbers and punctuation; passwords should not be considered secure.

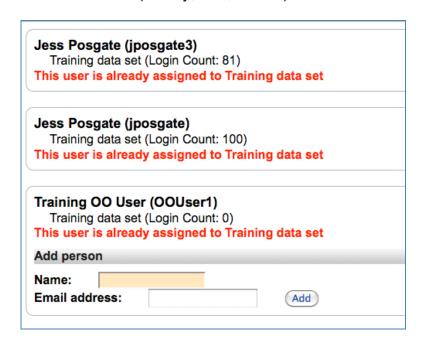
**Security Level:** Only levels 1-3 have meaning.

- Level 1 can create and edit records, but not delete
- Level 2 can create, edit and delete records as well as manage the agency profile and checklists.
- Level 3 can create, edit and delete records as well as manage the agency profile and checklists

**Remember:** User passwords are editable to anyone with access to the user management screen (i.e. users with Level 3 security access and Site Administrators). Any changes to that user's password, however, is **global** and will affect that user's access to **ALL** agencies to which they are assigned.

### **Disambiguation:**

Any similarity between a new user's full name, login name or email address will be identified within the entire MAD (Modify, Add, Delete) index and returned to you:



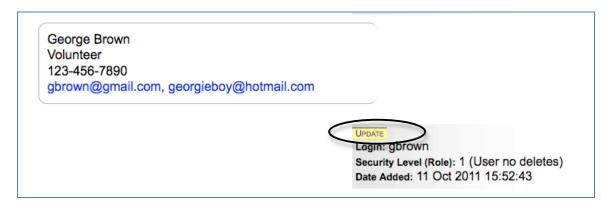
<sup>&</sup>quot;This user is already assigned to *AgencyName*": Alerts you to existing accounts and to avoid duplication.



"Add to agency": Offers an existing user account as one to add to your agency rather than adding a new account for someone who may already have one.

"Add person": Start fresh with a new name and email to create a new personnel account.





To edit the profile for a current personnel file, click on the Update button.

Required fields are Login Name, Password and Security Level.

#### **User Profile Information**

- The user's name, login name and email address are pre-populated for existing users. Edit those names here if necessary.
  - o **Full name**: should be entered in natural order (i.e. John Smith)
  - The Login name should be unique. Use only alpha (a-z) and numeric (0-9) characters.
  - Email: This is a private email address for that person and for use by VITA managers and Our Ontario staff.
- The password field is blank but not empty and should only be edited to change that user's password; leaving it blank will keep the password the same.
  - Password: should not be considered secure. Use 6-8 characters including numbers and punctuation. After the account has been added this appears blank. Only enter something here if you need to change the password, otherwise it will remain the same.
- After editing the user profile, click "Update" to commit the changes to the index.

User passwords are editable to anyone with access to the user management screen (i.e. users with Level 3 security access and Site Administrators). Any changes to that user's **password and profile**, however, is **global** and will affect that user's access to **ALL** agencies to which they are assigned.

## **Agencies**

- Each user can have access to one or more agencies.
- A list of agencies is shown along with the user's security level.
- To change the user's security level, you must login to the agency in question and change their security level for that agency

3.2.3 Delete user

To delete a user from an agency, go to their user profile and click Delete Personnel File.

You will receive a confirmation screen:

Confirm the deletion of the association of George Brown with this agency:

DELETE GEORGE BROWN'S PERSONNEL FILE

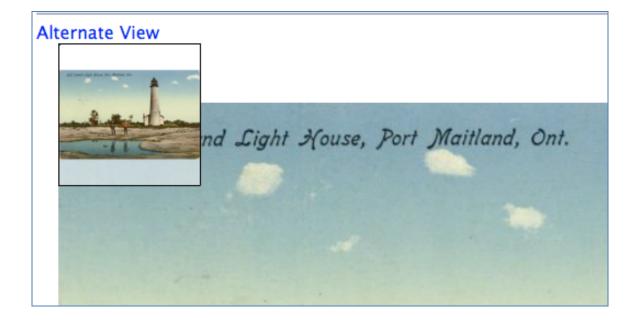
## 3.3 Image size

## Zoom image file options

Zoomify files require Flash to display. For viewers who do not have Flash installed on their computers, we offer up your static JPG image file instead. This is the default setting. If you want to suppress that alternate view, you can toggle that choice here:

Image Sizes and Options	
Display Zoom alternates	<ul> <li>Present alternate JPEG view for users who either cannot view a Flash Zoomify file or do not wish to.</li> <li>Suppress alternate display</li> <li>Note: An alternate display is a fundamental requirement for online accessibility. Choosing this option means we cannot make your site compliant with various disabilities acts.</li> </ul>
Constrain Zoom sizes	<ul> <li>Allow the full range of alternate Zoom window sizes</li> <li>Limit to only the two smaller sizes</li> </ul>

### Public view:



#### **Constrain Zoom Sizes**

On display pages for zoomified files, a range of options might be presented to the end user; use the following options to select the range of options.

Full range:

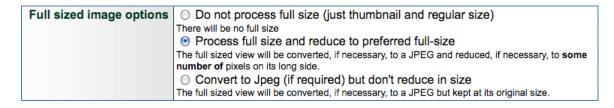
```
small (400 x 300)
default (900 x 700)
large (1200 x 900)
extra large (1600 x 1200)
```

Two smaller sizes:

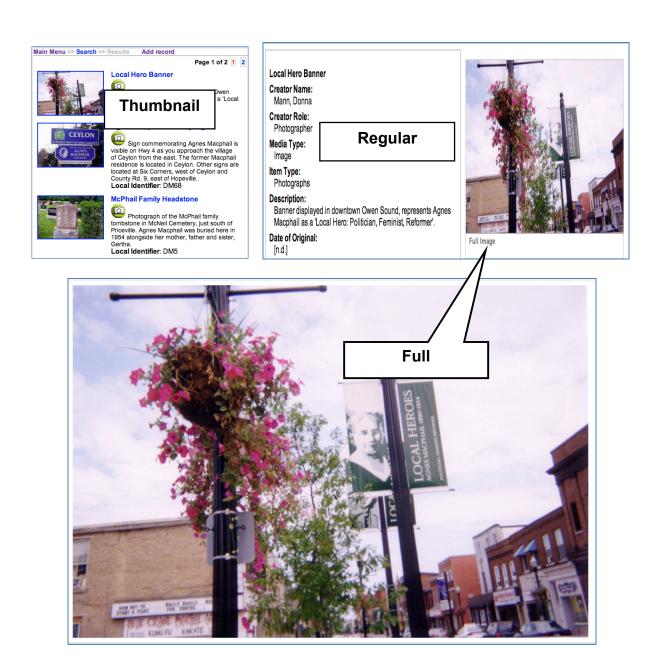
small (400 x 300) default (900 x 700)

### **Full Image Options**

The Image Sizes options are where you can choose to **not** include a full size display; to **include** a full size display that is processed to a specific number of pixels (see Image File Size, below); or, for larger files, to convert your original image file to a JPEG but **keep** the original size.



The public view of any VITA record will automatically include a **thumbnail** (shown in menu views) and a **regular** size (shown in record views). It is optional to provide a **full** size image of your object. [Note: images below are not to scale]



## **Image File Sizes**

During your agency set up, talk to Our Ontario staff about customizing the file sizes for each display option if necessary. Below are the default sizes.

Thumbnail	150
Regular	400
Full	1600
Reverse	800
Stereoview	1600
Detail	1600

The numbers here represent the **long side** of any image in pixels.

### 3.4 Permissions

# 3.4.1 Copyright statements

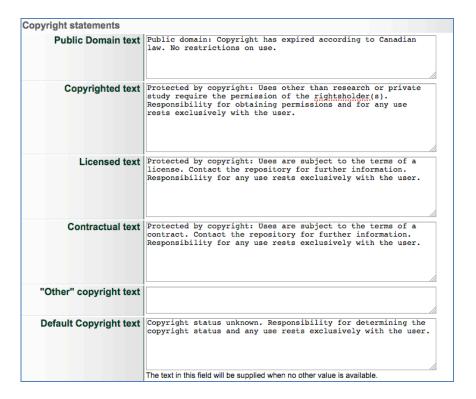
Your organization is responsible for determining the copyright status of the objects it plans to publish online.

### **Copyright Statements**

The Default statement is "Copyright status unknown", and makes the user responsible for determining copyright. In case users do not pursue the question and potentially misuse the content, best practices dictate that the organization publishing the object online makes every effort to determine the copyright status of its collection items.

For all objects, provide Terms of Use and Reproduction information that suits the copyright status of each item before they become public. The copyright statements page contains default values (as shown here), but you can create or customize these to suit your material or international copyright laws.

During data entry, a copyright status checklist is available on the administrative data screen of each record. The selected status will generate the corresponding statement on the public display.



#### Remember:

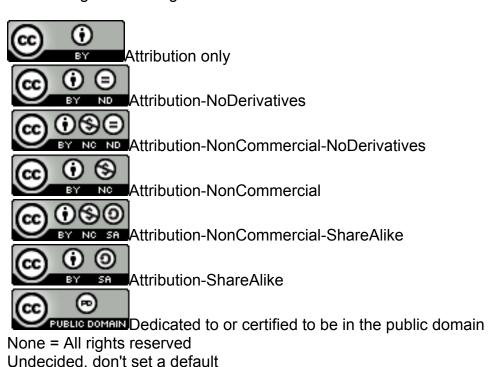
- Copyright status must be determined for every item as part of your workflow
- Please be sensitive to copyright restrictions as you build your collection and be sure to represent each object with the appropriate statement

For more information, see the Copyright FAQ available at http://knowledgeontario.ca/KOSolutions/OurOntario/FAQ/OurOntarioCopyrightFAQ.

3.4.2 Creative Commons licenses

Creative Commons is a nonprofit corporation dedicated to making it easier for people to share and build upon the work of others. The Creative Commons provides free licenses and other legal tools to indicate how others can share, remix or use objects commercially or any combination thereof are consistent with the rules of copyright. See the Creative Commons website at <a href="http://creativecommons.org/">http://creativecommons.org/</a>.

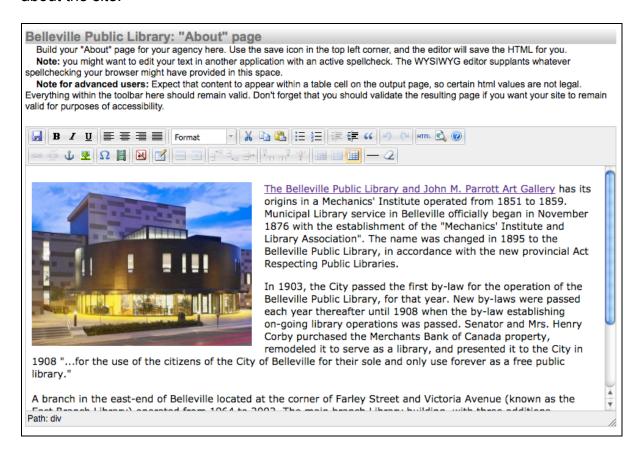
Part of the agency set up asks you to **select a default CC license** for your entire collection from the following options. Other CC licenses can be selected at the object level during data management.



### 3.5 "About" page

Every agency can create an "About" page for their VITA site.

Use the web page editor to build a profile of your agency, digitization project, or about the site.

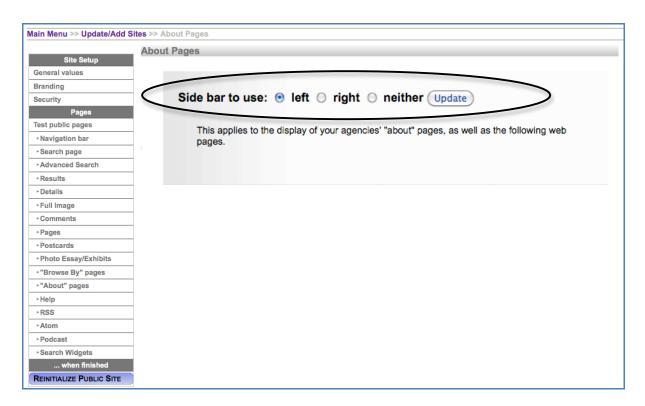


The result is a page with your default site branding and a customizable panel of information, links, graphics, etc.



Please note the information on that screen about validating your HTML for accessibility purposes.

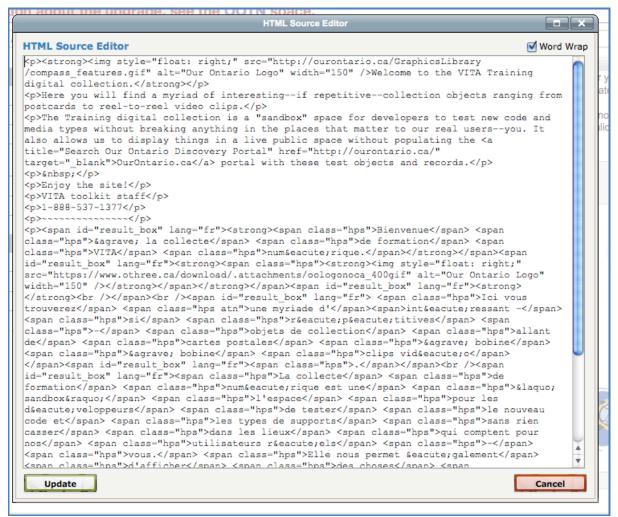
To include your sidebar for navigation purposes, save your About page text; go to Site Management; click on the "About page" link and select whether you want the right or left sidebar (see Site management Section 5.3.2 "Search page") to appear on your About page or neither if you prefer.





You can also insert a table and add a custom sidebar or navigation panel using the HTML editor.





To link to your About page you can capture the URL for that page (e.g. <a href="http://train.ourontario.ca/about/a1">http://train.ourontario.ca/about/a1</a>) and embed the link anywhere. To add it to your navigation sidebar, see Site Administration Manual, Section 5.3.2 "Search page".

# 3.6 Usage statistics

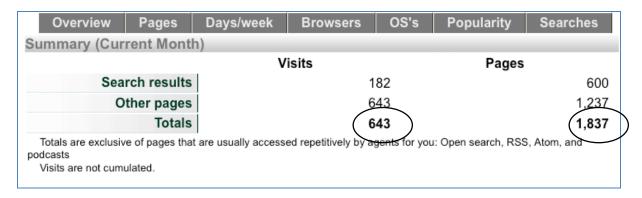
A variety of metrics are being generated that measure the use of your VITA collection and provide some information about how end users are accessing your

records. Select a tab within the usage stats screen to see how many users are finding and using your site and how they are finding material within your collection(s).

**Note:** All statistics are generated according to Agency, not Site. All stats are captured for data management and public interface uses. For multi-agency sites, the statistical snapshots will have to be calculated by adding together numbers from each Agency's Usage Statistics.

#### Overview

 Number of visits to your Site since the beginning of the current month and Pages viewed



<sup>&</sup>quot;Visits" count the number of unique sessions on the site.

### Pages

- Number of hits according to page type and period of time
- Note: some figures may be affected by spammers and robots (e.g. The number of hits on the Write Postcard page is not reflected by the number of Confirm Sending Postcard page because there is an anti-spam tool on that page)

<sup>&</sup>quot;Pages" count the number of Details pages viewed.

Overview Pages	Days/week	Browsers	OS's	Popula	rity Searches
Page views					
Page	Total Count	Last 365 days	Last 31 days	Last 7 days	Yesterday and Today
Search (initial screen)	17,389	15,954	838	246	49
Advanced Search	2,390	2,283	84	23	12
Results (plus mobile, What's New)	751,880	249,142	1,883	574	76
Details	72,017	65,223	2,429	594	79
Comments tab on Details	4,581	4,578	78	27	0
Full Image	19,575	17,509	595	194	37
User added content pages					
Add Comment	25,768	23,015	83	18	2
Write PostCard	67,613	67,170	112	33	1
Confirm sending PostCard	68,948	68,939	0	0	0
View PostCard	0	0	0	0	0
Optional pages					
Browse by Location	977	977	19	5	1
Browse by Subjects	1,936	1,863	67	12	2
Essay	10,673	6,073	0	0	0
Mobile pages					
Mobile Search	94	94	1	0	0
Mobile Details	376	376	83	14	1
Totals	1,044,217	523,196	6,272	1,740	260
"Subscription" pages					
RSS	22,519	20,242	1,754	815	135
Atom	9,218	8,975	783	266	55
Podcast	113	78	10	0	0
Open Search	26,109	22,543	11	2	1
Totals	57,960	52,361	2,564	1,084	451

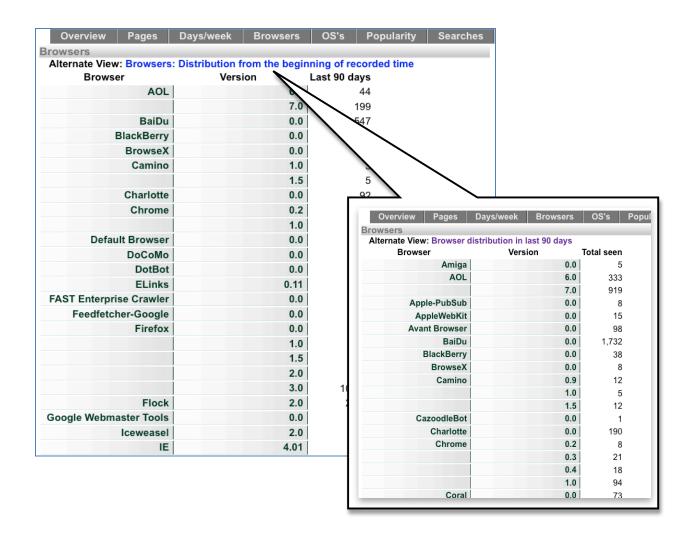
## Days/Week

Numbers of visitors according to each day of the week

Overvie	ew Pa	ages [	Days/week	Browsers	OS's	Popul	arity S	earches
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total
Days of the Week	43,857	63,759	53,052	54,338	47,004	47,307	41,581	350,898
% of Total	12	18	15	15	13	13	12	
	Due to rounding percentages may not add up to 100							

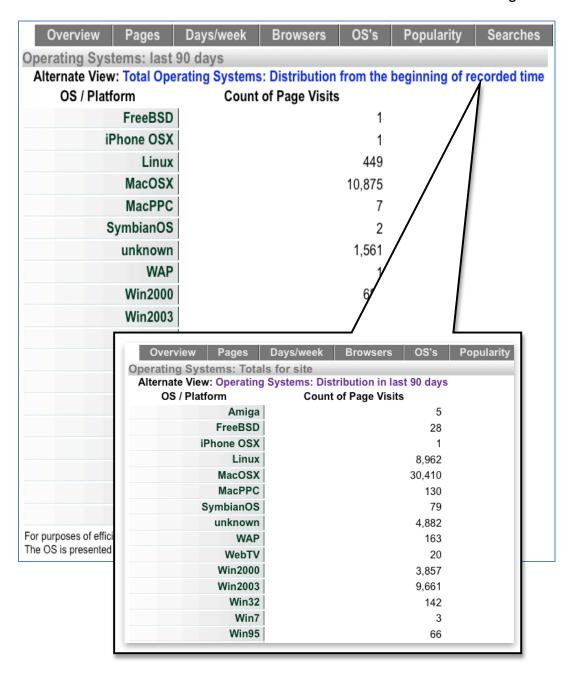
### **Browsers**

- Reveals the browser types and versions used by your viewers, information that might effect how you select material or choose display options for future collection building
- Default view shows browsers used in Last 90 Days
- · Click on link to see browsers used since information has been gathered



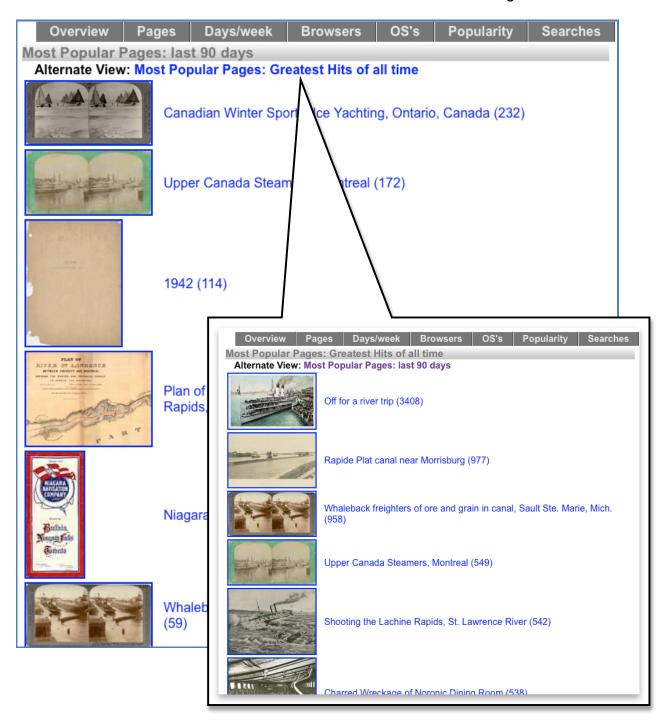
### OS's (Operating Systems)

- Shows what types and versions of operating systems your viewers are using, information that might determine what their experience of the site might be
- Default view shows browsers used in Last 90 Days
- Click on link to see browsers used since information has been gathered



### Popularity

- Displays which items in your collection are the most popular according to viewer hits
- Default view shows browsers used in Last 90 Days
- Click on link to see browsers used since information has been gathered



#### Searches

- Reveals how users are navigating through and searching on your site (e.g. keywords used, and any other constraints). The relative success of each of those searches is also tabulated
- For more detail about any given user session, click on the SessionID

