

GROUP MANAGEMENT SCREEN

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Create new record: with uploaded file; without upload (Duplicate) Create new template View entry in public site

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One of the features of VITA is the ability to create "groups" of records. The Groups screen allows you to manage your records within the Groups context. Creating and aggregating records into groups is not only best practice for organizing and managing your collection, it will also prove useful for creating Virtual Exhibits.

There are several ways you can add a record to a group. The fastest way is to use the checklist function to add your records to a group. Simply find the appropriate group on the check list, i.e., Postcards:

Group Management: Old Guelph (id: 1048)

This record is currently assigned to the following groups:

None

Additional Groups Show/Hide Shared Groups

- Associate Agency Example (1) Exclusive
- Audio Recordings (1) Exclusive
- BMDs (1) Exclusive
- Community Newspapers (0) Exclusive
- Horticultural Society Collection (0) Exclusive
- New group (1) Exclusive
- Newspapers (3) Exclusive
- Old Maps of Ontario (7) Exclusive
- Postcards (6) Exclusive
- Special Group (1) Exclusive
- Stories from Proton, Ontario (0) Exclusive
- Testimonials (2) Shared
- The Green Family Postcard Collection (1) Exclusive
- Training dataset local newspapers (0) Exclusive
- User Contributions: Training dataset (0) Exclusive
- Videos (2) Exclusive
- Virtual Exhibits (1) Exclusive
- VITA Toolkit Training Manuals (4) Exclusive

Update

Add New Group by entering Title :

(50 characters max) Go!

Select it, then click on Update

The record is now added to the Postcards group

Group Management: Old Guelph (id: 1048)

This record is currently assigned to the following groups:

Postcards



To remove this image from one of the groups to which it is currently assigned, simply uncheck it.

Additional Groups

- Associate Agency Example (1) **Exclusive**
- Audio Recordings (1) **Exclusive**
- BMDs (1) **Exclusive**
- Community Newspapers (0) **Exclusive**
- Horticultural Society Collection (0) **Exclusive**
- New group (1) **Exclusive**
- Newspapers (3) **Exclusive**
- Old Maps of Ontario (7) **Exclusive**
- Special Group (1) **Exclusive**
- Stories from Proton, Ontario (0) **Exclusive**
- Testimonials (2) **Shared**
- The Green Family Postcard Collection (1) **Exclusive**
- Training dataset local newspapers (0) **Exclusive**
- User Contributions: Training dataset (0) **Exclusive**
- Videos (2) **Exclusive**
- Virtual Exhibits (1) **Exclusive**
- VITA Toolkit Training Manuals (4) **Exclusive**

Add New Group by entering Title :

(50 characters max)

To remove a record from a group, go to the groups tab on the record's page, uncheck the group (s) that you want the record removed from, then click **Update**.

If the group you want to add the record to is not in the check list, you can use the **Add New Group** input box as a shortcut to create a new group. Type the name of the group you wish to create in the title field, then click on **Go**

Group Management: Old Guelph (id: 1048)

This record is currently assigned to the following groups:

None

Additional Groups

- Associate Agency Example (1) **Exclusive**
- Audio Recordings (1) **Exclusive**
- BMDs (1) **Exclusive**
- Community Newspapers (0) **Exclusive**
- Horticultural Society Collection (0) **Exclusive**
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- Special Group (1) **Exclusive**
- Stories from Proton, Ontario (0) **Exclusive**
- Testimonials (2) **Shared**
- The Green Family Postcard Collection (1) **Exclusive**
- Training dataset local newspapers (0) **Exclusive**
- User Contributions: Training dataset (0) **Exclusive**
- Videos (2) **Exclusive**
- Virtual Exhibits (1) **Exclusive**
- VITA Toolkit Training Manuals (4) **Exclusive**

Add New Group by entering Title :

(50 characters max)

You are now on the Group settings page.

Group Settings: New Postcards Group

There are 1 record(s) in this group.

Exclusive or shared group Exclusive: Group only contains Training data set records
 Any Agency: Group available to any agency and will appear in every agency's group management interface (unless it is closed)

Closed List Yes
 No
A closed list is one with a specific set number of records in it, with no more expected. For example, a set of five illustrations from a particular newspaper article might be a closed list. No more are expected. Closed lists are not made available in selection lists for additional records to be added to them. They might well be public.

Associate Agency An Associate Agency group is presented to the index and the end user as if it was another agency. Contact help@vitatoolkit.ca if you want to discuss setting one up.

Delete List A list can only be deleted when the last of the records associated with it have been unassigned. Start by [viewing the Records in this group](#).

[Update New Postcards Group](#) [Reset Form](#)

On this page, you can create a full record for your group, choose the group settings, show the records that have been added to the group and even sort the order on how the records will display. More information on how to create and manage groups can be found in the Managing Groups manual on the [VITA Toolkit Help site](#).

In this instance however, we simply want to ensure that our postcard has been put into the correct group. To do this, click on Show records:

Group Settings: New postcard Group

There are 1 record(s) in this group.

Exclusive or shared group Exclusive: Group only contains Training data set records
 Any Agency: Group available to any agency and will appear in every agency's group management interface (unless it is closed)

Closed List Yes
 No
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Delete List A list can only be deleted when the last of the records associated with it have been unassigned. Start by [viewing the Records in this group](#).

[Update New postcard Group](#) [Reset Form](#)

Records assigned to "New Postcards Group"

Group Menu

Full record

Group settings

Show records


Sort records

This group is managed by **Training data set**.

There is 1 record from your agency in this group.
To unassign records from this group, check the checkbox in the left column beside the appropriate record or click the "Select all records" button, and then click "Unassign selected records" button.

Your agency's records in this group

[Unassign selected records](#) [Select all records](#) [Unselect all records](#)

 Old Guelph

[Unassign selected records](#) [Select all records](#) [Unselect all records](#)

If we return to the **Groups screen** – by clicking on your browser's back button, or clicking on the record, i.e., Old Guelph – we can see that the record has been added to the newly created group:

Group Management: Old Guelph (id: 1048)

This record is currently assigned to the following groups:

New postcard Group ←

To remove this image from one of the groups to which it is currently assigned, simply uncheck it.

Additional Groups

- Associate Agency Example (1) **Exclusive**
- Audio Recordings (1) **Exclusive**
- BMDs (1) **Exclusive**
- Community Newspapers (0) **Exclusive**
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- Newspapers (3) **Exclusive**
- Old Maps of Ontario (7) **Exclusive**
- Postcards (6) **Exclusive**
- Special Group (1) **Exclusive**
- Stories from Proton, Ontario (0) **Exclusive**
- Testimonials (2) **Shared**
- The Green Family Postcard Collection (1) **Exclusive**
- Training dataset local newspapers (0) **Exclusive**
- User Contributions: Training dataset (0) **Exclusive**
- Videos (2) **Exclusive**
- Virtual Exhibits (1) **Exclusive**
- VITA Toolkit Training Manuals (4) **Exclusive**

Add New Group by entering Title :

(50 characters max)

You can add a record to as many groups as is appropriate

Groups can also be managed from the main menu under **Manage Groups**. Check the Managing Groups manual on the VITA help site for more details.

Manage Records

Add Record:

- [and upload file](#)
- [without a file](#)
- [as a Birth, Marriage or Death \(BMD\) entry](#)

Search or Update Record

- [Prooflist](#) [last added first, from the indexes]
- [Top 100 Records](#) [aka: the last 100 records added, from the database]
- Record id:

[Add/Edit Publication](#)

[Add/Edit Issue](#)

[Add Batch/Edit Templates](#)

Manage Comments

[List All Comments](#)

Manage Groups

[Add or Update Record Group](#)

Manage Exhibits

[Add or Update Exhibit](#)

Manage Application

[Agency Management](#)

[Site Management](#)

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[Logout](#)
