Managing Groups

Table of Contents

PART 1

GETTING STARTED

One of the features of VITA is the ability to create "groups" of records.

- Groups are "owned" by the agency who creates them.
- Groups can be created on any topic that you think is relevant – i.e. Churches in the Niagara Region, Train Stations with Unique Architecture, My Favorite Pictures, etc.
- Groups and their content can be easily created, edited, and deleted by the owner agency.
- Records can be assigned to one or more groups *at the same time*.
- Groups can be publicly displayed or kept non-public and used for internal management purposes.
- Groups can be shared (open to any agency to add) or exclusive (only your agency has access and can manage).
- Groups can be added to other Groups
- Groups can be "closed" to stop any new items being added.

1.1: LOGGING IN

Go to https://data.vitatoolkit.ca
Enter your username and password and click the Big **Login** Button
Note: Usernames and passwords are assigned by your site and agency administrators and are case sensitive

If you are managing data in multiple agencies, you will be presented with a list of agencies. Select the agency whose collection content you are planning to work on.

Select Agency

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

- 1812 History
- Ajax Public Library
- Algonquin Area Public Library
- Alpena County George N. Fletcher Public Library
- Amethyst Mine Panorama
- Atikokan Mining Attraction Association
- Bancroft Public Library
- Barrie Public Library
- Beardmore Regional Historical Society
- Belleville Public Library
- Bibliothèque Du Canton d'Alfred-Plantagenet
- Bibliothèque Publique de Clarence-Rockland
- Bibliothèque publique de Hawkesbury
- Bibliothèque Publique de La Nation
- Bibliothèque publique du canton de Russell
- Blind River Public Library
- Bracebridge Public Library
- Brampton Library
- Brighton Digital Archives
- Brock University Archives
- Brockton Heritage Committee
- Bronte Historical Society
- Burk's Falls, Armour & Ryerson Union PL
- Burlington Public Library
- Caledon Public Library
- Chatham-Kent Museum
- Chatham-Kent Public Library
- Christie Historical Committee
- City of Burlington, Clerks Department
- Clarington Museum and Archives
- Clarington Public Library
- Club généalogique du Nipissing Ouest
- Cobourg Public Library
- Community Archives of Belleville & Hastings County
- Cook Memorial Public Library District
- County of Brant Public Library
- Cramahe Township Public Library
- Default Agency

If you work with a single agency, you will be delivered immediately to the main menu of that agency.

PART 2

CREATING GROUPS

There are two ways to create groups in VITA. One is from the **Main Menu**, and the other is from within the **Groups** tab in the VITA workflow.

2.1 CREATING A GROUP FROM THE MAIN MENU

To add a group from the **Main Menu**, click on **Add or Update Group** under the **Manage Groups** section.

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: [　　　　] go

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
    Monthly Statistical Snapshot

Once you have clicked on **Add or Update Record Group** you will land on the **Update/Add Groups screen**.

At the bottom of the screen you will see the **Add New Group** field. Simply type in the name of the group want to create then click on **Go!**

Main Menu >> Add / Update Groups

Scroll to the bottom of the page to add a new group.

Name	Update	Records	Public?	Open/Closed	Shared	Associate Agency
Associate Agency Example	Update	1	Public	Open	Exclusive	Associate Agency
Audio Recordings	Update	1	Public	Open	Exclusive	
BMDs	Update	1	Public	Open	Exclusive	
Community Newspapers	Update	0	Public	Open	Exclusive	
Flesherton business photographs	Update	6	Public	Closed	Exclusive	
Guelph Postcards	Update	0		Open	Exclusive	
Horticultural Society Collection	Update	0	Public	Open	Exclusive	
New group	Update	0		Open	Exclusive	
New Postcards Group	Update	1		Open	Exclusive	
Newspapers	Update	3	Public	Open	Exclusive	
Old Maps of Ontario	Update	7	Public	Open	Exclusive	
Postcards	Update	6	Public	Open	Exclusive	
Special Group	Update	1	Public	Open	Exclusive	
Stories from Proton, Ontario	Update	0		Open	Exclusive	
Testimonials	Update	2		Open	Shared	
The Green Family Postcard Collection	Update	1	Public	Open	Exclusive	
Training dataset local newspapers	Update	0	Public	Open	Exclusive	
User Contributions: Training dataset	Update	0	Public	Open	Exclusive	
Videos	Update	2	Public	Open	Exclusive	
Virtual Exhibits	Update	1	Public	Open	Exclusive	
VITA Toolkit Training Manuals	Update	4	Public	Open	Exclusive	

Add New Group by entering Title :

New Group
(50 characters max)

Go!

Main Menu >> Update/AddGroups

Once you click on **Go**, you will land on the Group Settings screen, where you can determine how the groups you create will function.

Please see Part 2 for instructions on how to set up your Group

2.2 CREATING A GROUP FROM WITHIN THE GROUP TAB

Whether you are creating a new record, or editing an existing one, you can use the **Group** tab from within the VITA workflow – a quick and easy way to ensure your records are aggregated for optimum collection management.

Clicking on the Groups tab will take you to the Groups Management screen where you will see a list of all the groups you have created for your agency.

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**
- ☐ Guelph Postcards (0) **Exclusive**
- ☐ Horticultural Society Collection (0) **Exclusive**
- ☐ New group (0) **Exclusive**
- ☐ New Group (0) **Exclusive**
- ☐ New Postcards Group (0) **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   Reset

Add New Group by entering Title :

[   ] Go!

(50 characters max)

Main Menu >> Search >>

To add a record to a group – or groups – simply click on the box beside that group. Once you have chosen all the groups you want, don't forget to click **Update** to commit the changes.

In this example, we are going to add a record to several groups:

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**
- ☑ Guelph Postcards (0) **Exclusive**
- ☐ Horticultural Society Collection (0) **Exclusive**
- ☐ New group (0) **Exclusive**
- ☐ New Group (0) **Exclusive**
- ☑ New Postcards Group (0) **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   Reset

Add New Group by entering Title :

[   ] Go!

(50 characters max)

9

Once you click on **Update**, the record is added to the chosen group(s):

Group Management: Old Guelph (id: 1048)

This record is currently assigned to the following groups:

☑ Guelph Postcards
☑ New Postcards Group
☑ Postcards

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

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 (0) **Exclusive**
☐ New Group (0) **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**

Update   Reset

Add New Group by entering Title :

[   ] Go!

(50 characters max)

You can also create new groups from within the Groups tab. The process is exactly the same as it is for creating groups from the main menu, i.e., enter the name of the group you wish to create in the **Add New Group** field at the bottom of the groups management screen, then click on **Go**.

Once you click on Go, you will land on the Group Settings screen, where you can determine the functionality of your group(s)

PART 3

GROUP SETTINGS

3.1 EXCLUSIVE OR SHARED GROUPS

One of the first options you have in group management is to indicate whether this will be an exclusive or shared group:

Name	Update	Records	Public?	Open/Closed	Shared	Associate Agency
Associate Agency Example	Update	1	Public	Open	Exclusive	Associate Agency
Audio Recordings	Update	1	Public	Open	Exclusive	
BMDs	Update	1	Public	Open	Exclusive	
Community Newspapers	Update	0	Public	Open	Exclusive	
Flesherton business photographs	Update	6	Public	Closed	Exclusive	
Guelph Postcards	Update	0		Open	Exclusive	
Horticultural Society Collection	Update	0	Public	Open	Exclusive	
New group	Update	0		Open	Exclusive	
New Group	Update	0		Open	Exclusive	
New Postcards Group	Update	0		Open	Exclusive	
Newspapers	Update	3	Public	Open	Exclusive	
Old Maps of Ontario	Update	7	Public	Open	Exclusive	
Postcards	Update	6	Public	Open	Exclusive	

Exclusive groups can only be edited and have records added and managed by your agency. Public groups will display on the public side anywhere they are linked or found in groups listings, but only your groups will appear in your agency's data management lists.

Shared groups are "owned" by the agency that adds the group. At this point, the owner **cannot** choose which organizations to share records with; it is open to everyone using VITA.

11

Contributing agencies can only manage their own records however, so there is no fear that sharing records in a group will open your records to non-owner tampering.

Records can be added to the group by all other agencies using VITA, but all contributors can **only** delete and manage their own records. The group itself cannot be deleted by any agency other than the "owner" and only after all records have been removed from the group.

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

There are **5** records 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.

Contributor record management in View Records screen allows select/unselect and un-assign options:

Your agency's records in this group

Unassign selected records   Select all records   Unselect all records

☐ **Public School, Huntsville, Ont.**

☐ **Riverdale Park, Toronto**

☐ **Riverdale Park, Toronto**

☐ **Riverdale, Toronto**

☐ **St. George's Square**

Unassign selected records   Select all records   Unselect all records

"Other" Contributor records in View Records screen are view-only:

3.2 CLOSED LIST

Closed List - 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.
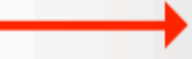
Closed lists are not made available in selection lists for additional records to be added to them. They can be public or non-public.

3.3 DELETE LIST

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**.

A Group can only be deleted by the "owner" agency and only when all the records associated with it have been unassigned.

To deselect – or unassigned - records in a group, access the group via the Add and Update Groups link on the main menu – locate the group you are going delete – click on update

Horticultural Society Collection	Update	0	Public	Open	Exclusive	
New group	Update	0		Open	Exclusive	
New Group	Update	1		Open	Exclusive	
Newspapers	Update	3	Public	Open	Exclusive	
Old Maps of Ontario	Update	7	Public	Open	Exclusive	
Postcards	Update	5	Public	Open	Exclusive	
Special Group	Update	1	Public	Open	Exclusive	

14

You are now on the group management screen. To view the records added to this group, click on Show records in the Group Menu

Group Menu

Full record

Group settings

Show records

Sort records

Descriptive Data: Postcards (id: 1049)

No Item Type has been assigned.
Sortable Date has not been assigned.
Earliest Year has not been assigned.
Latest Year has not been assigned.
No files have been attached.

Update

Public Display? | Help

● Yes   ○ No

Media Type | Help

Group
This value determines a number of other options for this record.

To remove all records from the group, simply click the little box beside each record, then click on **Unassign Selected Records**

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

There are **4** records 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

☑ Riverdale Park, Toronto

☑ Riverdale Park, Toronto

☑ Riverdale, Toronto

☑ St. George's Square

Unassign selected records   Select all records   Unselect all records

15

Once all records have removed, the group can then be deleted

Click on the "Update group" link and now a "Delete Group" button will appear

PART 4

GROUP MANAGEMENT

4.1 ADDING A FULL RECORD

A full record is a searchable record and displays like other VITA records i.e. in results and as a Details screen.
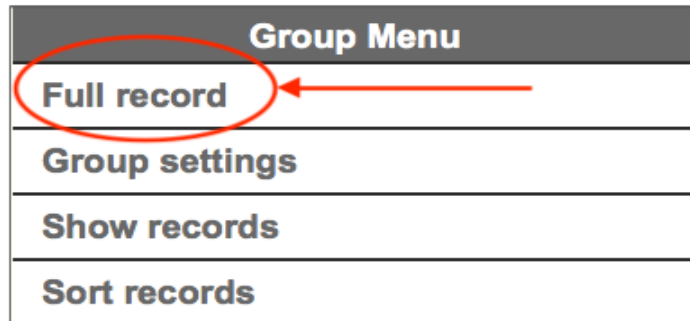
A few notes about how to use the Full record:

There is a lot of value in adding a full record about the Group **as a unique, curated item** using the VITA templates. Keep in mind, though, that each record you've included in the group already has a description, so re-describing every object here might not be the best use of your time.

The full record uses the standard VITA templates where you can add or modify:

- a thumbnail + regular file (for results and details screens)
- Group description (for full-text search and results displays)
- geographic location(s) (used for faceted searching)
- inclusion in other Groups (for navigation, display, and discovery)
- administrative data (for internal purposes)
- adding links to other, related material
- settings like public/non-public and deleting the Group

    Note: The Friendly Reminders include a reminder when there are zero items in a group.
    Note: A Group can be added to other Groups (See Groups & Subgroups)

The workflow for setting up a full group record is exactly the same as it is when you add any type of record in VITA (see the Adding and Managing Records manual/video for more details).


4.1.2 DESCRIPTION

Public Display - Select **Yes** and this group will appear on the details screen for each of the records assigned to the group in both the public and data management displays.

Select **No** and the group will only be available internally for data management purposes and the group will only appear in the data management details screen of the record. The group will only be listed in the Data Management Advanced Search Screen Groups panel.

The **Primary Media type** is **fixed** at "Group" to enable certain functionality and discovery, e.g. as a search facet on results and in advanced search screens, for example;

The group will be listed in the Advanced Search screen in the Sub-Collections Panel.
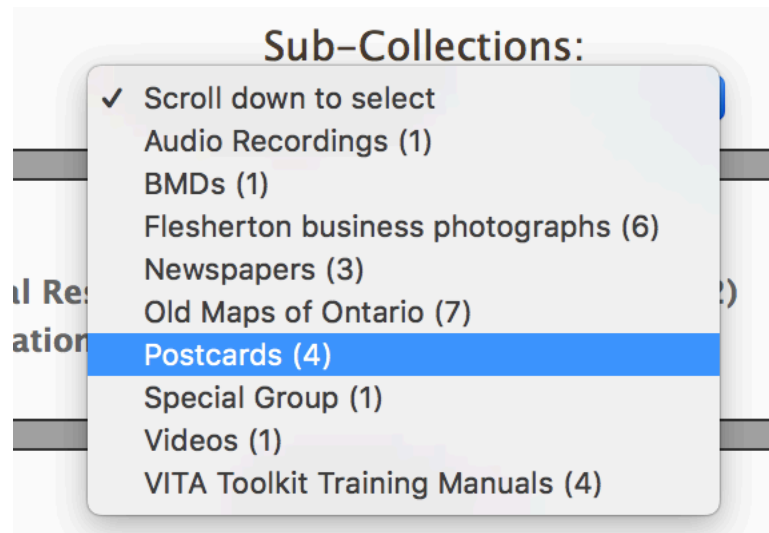
The Advanced Search screen also offers the option to limit searches by specific Media Type – including Groups.

You can add multiple media and item types.

The Title is carried forward from the Add/Update screen.
The other fields are open for you to add additional information and custom content.

Note: what you are describing is the Group and its contents, for example:

- there may not be one single Item type
- the Creator might be the name of the person who compiled the Group, not creator of the individual items
- there might be a Date Range in the Date of Events Depicted

- Subjects, Personal Names, geographic locations, etc. may all include multiple entries—or none!

Your items should have fulsome records unto themselves. It's up to you how much summary detail you want to include in the record.

Here's a bare-bones Group record in public display that does not add any searchable content to the index (remember, it has NO items at this point):

Public Display

Compared to a more complete group record (with Items) which adds many access points for search and discovery:

Descriptive Data: Postcards (Id: 1049)

Update

Public Display?   Help
○ Yes   ○ No

Media Type ⊞▾   Help
Group
This value determines a number of other options for this record.

Secondary Media Types ⊞▾   Help
○ Image ○ Text ○ Video ○ Object ○ Audio ○ Genealogical Resource ○ Newspaper ○ Place

Item Type   Help
○ Postcards▾
Enter item type: [   ]

Title ⊞▾   Help

Postcards

Creator Name & Role ⊞▾   Help
Name: [   ]
Role:
○ Correspondent ▾ ○ [n/a]
[   ]

Contributor Names & Roles ⊞   Help

Additional Contributor
Name: [   ]
Role:
[   ]

Subjects ⊞   Help
○ Correspondence ; ○ Memorabilia ▾

Assign Subject Term(s) from Thesaurus:
Enter subject: [   ]

Add New Subject Term: (not in Thesaurus)
[   ]
Enter a term here if it will not appear in the subject lookup boxes above.
It will be added as "Unauthorized" to the Thesaurus and then automatically assigned to this record.

Update

Personal Name(s)   Help
[   ]

Corporate Name(s)   Help
[   ]

Description ⊞▾   Help
A collection of Postcards showing areas within the Southern Ontario region

---

Group Menu
Full record
Group settings
Show records
Sort records
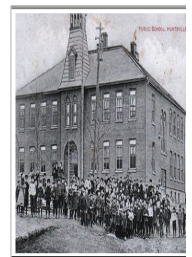
Full Image
No comments

Groups of Related Records
Southern Ontario in the early 1900s

21

Public display:

Postcards

Records | **Description** | Comments (0)

Media Type:
Group
Image

Item Type:
Postcards

Description:
A collection of Postcards showing areas within the Southern Ontario region

Date of Original:
1910–1940

Subject(s):
Correspondence
Memorabilia

Language of Item:
English

Geographic Coverage:

📍 Capreol
Ontario, Canada
Latitude: 46.71678 Longitude: –80.93304

📍 Guelph
Ontario, Canada
Latitude: 43.5501 Longitude: –80.24967

📍 Huntsville
Ontario, Canada
Latitude: 45.33341 Longitude: –79.21632

📍 Old Toronto
Ontario, Canada
Latitude: 43.64999 Longitude: –79.38206

Contact Us!
Training data set
info@ourdigitalworld.org
URL http://ourdigitalworld.org/
Mail
Our mailing address
Our phone number
For inquiries about **any news content**, contact info@ourdigitalworld.org

Comment on this item

Records

Public School, Huntsville

St. George's Square

Old Guelph

Riverdale Park, Toronto

Map | Satellite

Google

Imagery ©2018 Terra Terms of Use
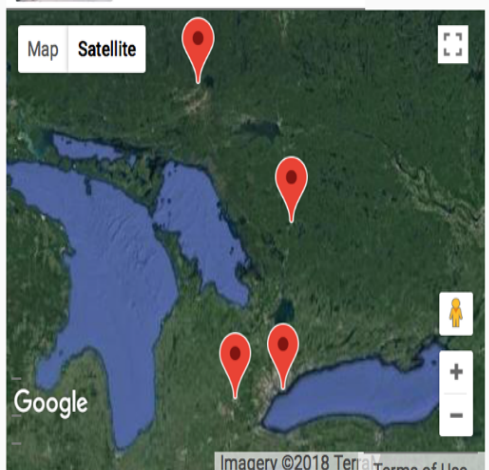
For more details on adding metadata to Records see the Adding and Managing Records manual. Keep in mind that you are describing a collection of things brought together for some reason, and that is what is of interest the public!

4.1.3 FILE/TECH

Group records display like any other item record in VITA, so choose an image for the **thumbnail** and **regular** display category to represent your Group in results sets and the Details screen. In results, a generic thumbnail is assigned if none is associated with the record.
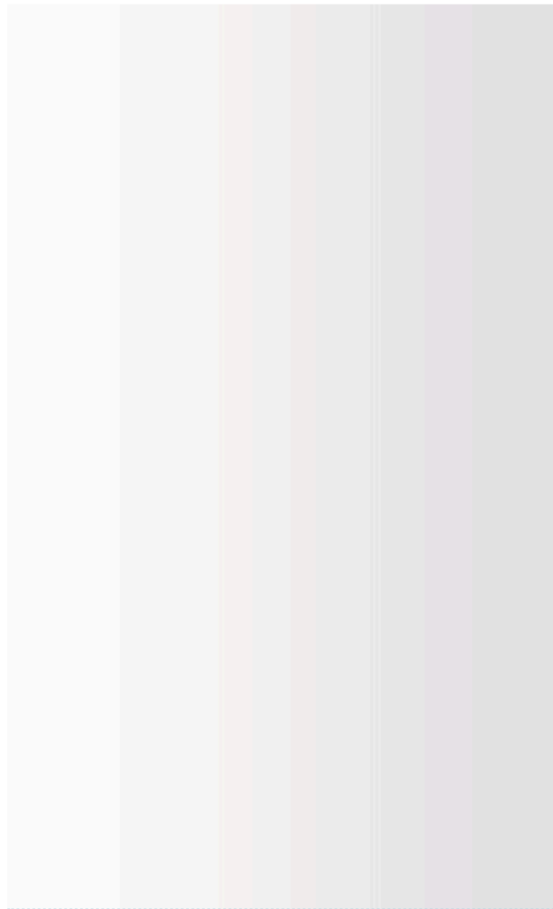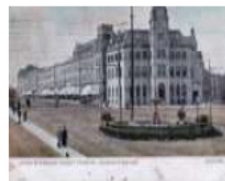
In the details screen, no image appears unless a regular display file is assigned to represent the group record. The process for assigning a representative image for any group is the same as when attaching any file to a record.

Go the **File/Tech** tab on the **Group Management** Screen and click on **Associate file with this record**:

23

Once on the Add file screen, select the category – add and upload the image file:

Note: As the image being added is a representation – or hero shot – for the group – choose Thumb+Regular for the category.

Representative Image (Hero shot)

Add one or more geolocations to inform the geo-search options on your results screens.

Geographic data: Postcards (id: 1049)

[Update]

Public Display? [Help]
● Yes ○ No

Geographic Location 🔆 [Help]

Agency Geographic Checklist

☐ **Ajax**
  Ontario, Canada
  populated place (43.85012, -79.03288)
☐ **Alert Bay**
  British Columbia, Canada
  bay (50.58293, -126.93639)
☐ **Downers Grove**
  Illinois, United States
  populated place (41.80892, -88.01117)
☐ **Eureka**
  Washington, United States
  populated place (46.30319, -118.61665)
☐ **Flesherton**
  Ontario, Canada
  area (44.2612, -80.5497)
☐ **Guelph**
  Ontario, Canada
  populated place (43.5501, -80.24967)
☐ **Hanover**
  Ontario, Canada
  populated place (44.15009, -81.03303)
☐ **London**
  Ontario, Canada
  area (43.08339, -81.29975)
☐ **Paris**
  Ontario, Canada
  area (43.2001, -80.38297)
☐ **Prince Albert**
  Saskatchewan, Canada
  populated place (53.20008, -105.76772)
☐ **Sointula**
  British Columbia, Canada
  area (50.63294, -127.0198)
☐ **Squamish**
  British Columbia, Canada
  populated place (49.74967, -123.13597)

Selected places

☑ **Capreol** [Edit]
  Ontario, Canada
  area
  (46.71678, -80.93304)

☑ **Guelph** [Edit]
  Ontario, Canada
  populated place
  (43.5501, -80.24967)

☑ **Huntsville** [Edit]
  Ontario, Canada
  populated place
  (45.33341, -79.21632)

☑ **Old Toronto** [Edit]
  Ontario, Canada
  populated place
  (43.64999, -79.38206)

Add place [_____] ❌
Enter a minimum of three letters.
Constraints: Ontario Canada ❌
[Select a country ▾]

25
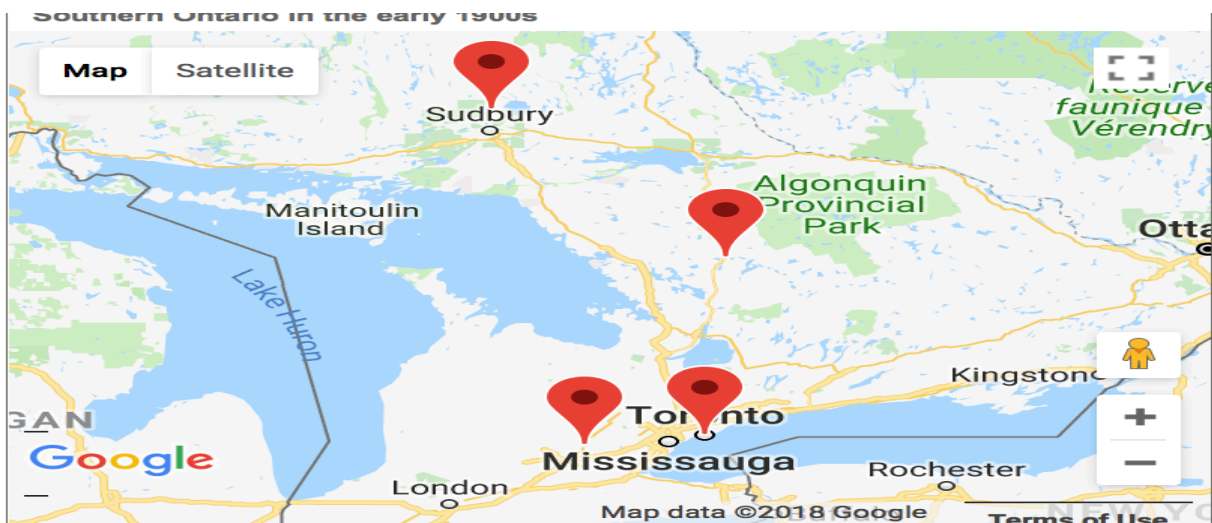
A very brief template wherein the group record language, CC license, copyright status and copyright holder information can be captured.

Public Display? | **Help**
○ Yes   ○ No

Language of Description ⊡ | **Help**
○ English
○ Français
Add language [_____]
Hint: Captialize language, e.g."Spanish"

Location of original (private) | **Help**
[   ]

Location of original (public) | **Help**
[   ]

Permissions

Creative Commons Licence | **Help**
○ (cc) BY Attribution only [**licence details**]
○ (cc) BY ND Attribution-NoDerivatives [**licence details**]
○ (cc) BY NC ND Attribution-NonCommercial-NoDerivatives [**licence details**]
○ (cc) BY NC Attribution-NonCommercial [**licence details**]
○ (cc) BY NC SA Attribution-NonCommercial-ShareAlike [**licence details**]
○ (cc) BY SA Attribution-ShareAlike [**licence details**]
○ PUBLIC DOMAIN Dedicated to or certified to be in the public domain [**licence details**]
○ none = All rights reserved
○ undecided, don't set a default

Copyright Status ⊡ | **Help**
○ Public Domain ▽
○ Copyrighted ▽
○ Licensed ▽
○ Contractual ▽
○ Other ▽
○ Leave as default

Copyright Date | **Help**
[_____]

Copyright Holder | **Help**
[   ]

Copyright Holder Contact Information | **Help**
[   ]

26

Like any record, you can add a group to another Group.

Group Management: Postcards (id: 1049)

This record is currently assigned to the following groups:

☑ Southern Ontario in the early 1900s

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

Additional Groups [Show/Hide Shared Groups]

☐ Associate Agency Example (0) **Exclusive**

☐ Audio Recordings (1) **Exclusive**

☐ BMDs (1) **Exclusive**

☐ Community Newspapers (0) **Exclusive**

☐ Horticultural Society Collection (0) **Exclusive**

☐ Newspapers (3) **Exclusive**

☐ Old Maps of Ontario (7) **Exclusive**

☐ Special Group (1) **Exclusive**

☐ Stories from Proton, Ontario (0) **Exclusive**

☐ Testimonials (1) **Shared**

☐ Training dataset local newspapers (0) **Exclusive**

☐ User Contributions: Training dataset (0) **Exclusive**

☐ Videos (2) **Exclusive**

☐ Virtual Exhibits (0) **Exclusive**

☐ VITA Toolkit Training Manuals (4) **Exclusive**

[Update] [Reset]

Add New Group by entering Title :

[   ] [Go!]

(50 characters max)

See Groups & Subgroups below.

Use this screen to add URLs and labels for linking the group record to other online resources.

Links added:

Public view:

First: Are you sure? You can always make the Group non-public instead

Second: Don't worry: You cannot delete a Group until you have unassigned all the items within that group.

Click on the "See items here" link to get to the review screen > Select all> Unassign selected records

The Delete option on both Group Settings and Full Record screens will redirect you to unassign the contents first.

Once you unassign the items from the group, you'll receive a confirmation and redirect to the Group Settings screen:

On the Group Settings or Group Record screen, the Delete button will appear:

4.2 UPDATE/EDIT GROUP

In the main menu, click on Add or Update Record Group in the Manage Groups section.

You will be presented with the Update/Add Groups screen and a list of groups created by your agency.

Name	Update	Records	Public?	Open/Closed	Shared	Associate Agency
Associate Agency Example	Update	0	Public	Open	Exclusive	Associate Agency
Audio Recordings	Update	1	Public	Open	Exclusive	
BMDs	Update	1	Public	Open	Exclusive	
Community Newspapers	Update	0	Public	Open	Exclusive	
Flesherton business photographs	Update	6	Public	Closed	Exclusive	
Horticultural Society Collection	Update	0	Public	Open	Exclusive	
Newspapers	Update	3	Public	Open	Exclusive	
Old Maps of Ontario	Update	7	Public	Open	Exclusive	
Postcards	Update	1	Public	Open	Exclusive	
Southern Ontario in the early 1900s	Update	0		Open	Exclusive	
Special Group	Update	1	Public	Open	Exclusive	
Stories from Proton, Ontario	Update	0		Open	Exclusive	
Testimonials	Update	1		Open	Shared	
Training dataset local newspapers	Update	0	Public	Open	Exclusive	
User Contributions: Training dataset	Update	0	Public	Open	Exclusive	
Videos	Update	2	Public	Open	Exclusive	
Virtual Exhibits	Update	0	Public	Open	Exclusive	
VITA Toolkit Training Manuals	Update	4	Public	Open	Exclusive	

To update the values for the group:

- Click update
- The Update link will take you to the Group full record screen
- Edit the values for the group
- Click the update button

To review the records in the group:

See all items in a Group by going to...

1) Full record> Show records

Descriptive Data: Southern Ontario in the early 1900s (id: 1492)

Update

Public Display? Help

● Yes ○ No

Media Type 🔶💡 Help

Group
This value determines a number of other options for this record.

Secondary Media Types 🔶💡 Help

□ Image □ Text □ Video □ Object □ Audio □ Genealogical Resource □ Newspaper □ Place

Item Type Help

☑ Postcards 🔲
Enter item type: [   ]

Title 🔶📶📶🌐 Help

Southern Ontario in the early 1900s

From here, you can review and manage Group contents:

Records assigned to "Southern Ontario in the early 1900s"

Group Menu

Full record

Group settings

Show records

Sort records

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

There are **4** records 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

□ Riverdale Park, Toronto

□ St. George's Square

□ United Church, Capreol Ontario

Unassign selected records Select all records Unselect all records

Use the checkboxes and buttons to select and/or unassign records from the Group.

To **un-assign** records from this group, use the checkboxes or select un-select buttons then click "unassign selected records". This will *only* remove the records *from the group*: it will not affect the records themselves.

Unassigning items from a Group

On the review screen, you can

1. a) see what's in your group
2. b) deselect or "unassign" one or more items from the Group using the checkboxes and labeled buttons at the top and bottom of the screen

The Sort Group option is only available for groups with less than 100 records.

You might want the items of a group to appear in a specific order, particularly those that would be the first 3 of a large group, or 10 of a smaller group since they appear with the group record. You can order every item in the group to customize their display in the gallery. This **fixes** their display order, however, so end users cannot re-sort those objects using other criteria.

Southern Ontario in the early 1900s

For groups with **<20 items**, you can drag and drop to reorder them using the elevator buttons

For larger groups, you'll need to use numeric text boxes e.g.

Split Rail Country Volume 2

Step 1: Sort the Images

Enter different numbers in the input boxes to adjust the sort order. Decimal fractions are allowed (e.g. enter "1.5" to

| 1 | | Old Flesherton Advance Building, Flesherton |
2		Bee Barn, Hill Street, Flesherton
3		Local Colour Art Gallery, Flesherton
9		Cast of Agnes Macphail play
13		Murray Juffs as Agnes Macphail with Kris Kinsman and George Allen
16		Reunion Drama Club: Fiddler on the Roof
15		Reunion Drama Club: Guys & Dolls

After Re-Sorting your Group content, **preview the new record order** by clicking on the "update record order" button at the bottom of the screen
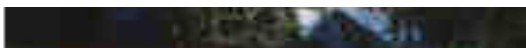
| 37 | | Teens working on M |

Update record order

Step 2: Commit the Changes

Remember: any unnumbered images will float to the top of the list. The preview screen allows you to review and adjust the order of your group images before committing that order.

Remember: Preview is a superficial view option, but "Commit the Changes" will reindex all the records in this group—this takes time, depending on the size of a group.

Use the Preview option liberally—Commit only when you're sure!

Royal Commissions 1943-1980

Royal Commissions 1943-1980:

Asylum for the Insane Report
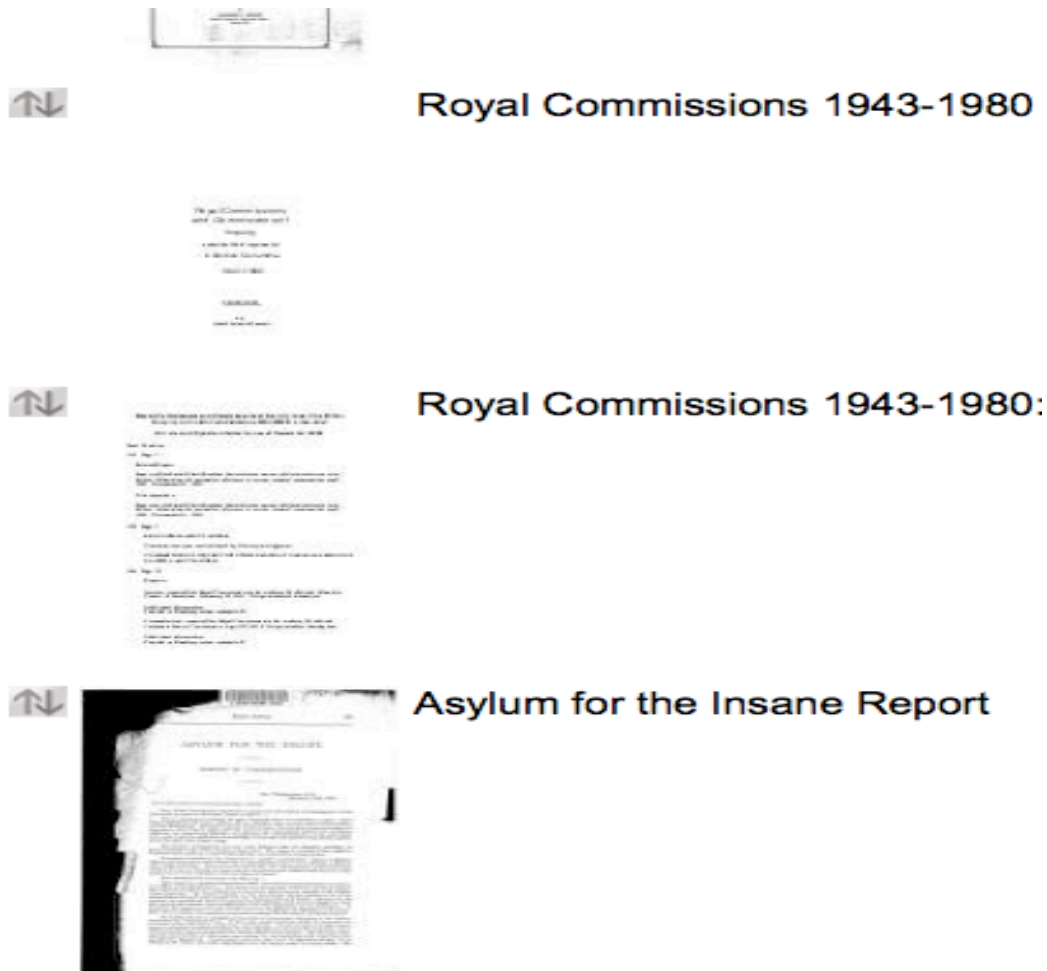
Step 2: Commit the Changes

Once the reindexing has occurred, you will receive a confirmation message.