

PART 3

GROUP SETTINGS

Group Menu
Full record
Group settings
Show records
Sort records

Group Settings: New Group

There are 0 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 Group](#) [Reset Form](#)

[DeleteNew Group](#)

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.

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:

... unassign records from this group, select the checkbox in the left column...

Your agency's records in this group

<input type="checkbox"/>		<input type="checkbox"/> Public School, Huntsville, Ont.
<input type="checkbox"/>		<input type="checkbox"/> Riverdale Park, Toronto
<input type="checkbox"/>		<input type="checkbox"/> Riverdale Park, Toronto
<input type="checkbox"/>		<input type="checkbox"/> Riverdale, Toronto
<input type="checkbox"/>		<input type="checkbox"/> St. George's Square

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

Other agencies' records in this group

The screenshot displays a list of records from South Grey Museum. Each record includes a thumbnail image of the document and a title. The records are:

- Dear Friend** - South Grey Museum
- Proposal for International Peace Department** - South Grey Museum
- Dear Friends** - South Grey Museum
- Answer to Miss Macphail** - South Grey Museum

3.2 CLOSED LIST

Group Settings: New Group

	There are 0 records(s) in this group.
Exclusive or shared group	<input checked="" type="radio"/> Exclusive: Group only contains Training data set records <input type="radio"/> Any Agency: Group available to any agency and will appear in every agency's group management interface (unless it is closed)
Closed List	<input type="radio"/> Yes <input checked="" type="radio"/> No <small>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.</small>
Associate Agency	An Associate Agency group is presented to the index and the end user as if it was another agency. Contact help@vitaltoolkit.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 .

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.

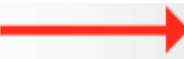
Closed lists are not made available in selection lists for additional records to be added to them. They can be public or non-public.

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

Group Name	Update	Count	Public	Open	Exclusive
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

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

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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

<input checked="" type="checkbox"/>	 Riverdale Park, Toronto
<input checked="" type="checkbox"/>	 Riverdale Park, Toronto
<input checked="" type="checkbox"/>	 Riverdale, Toronto
<input checked="" type="checkbox"/>	 St. George's Square

Unassign selected records Select all records Unselect all records

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

Records assigned to "Postcards"

Group Menu

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This group is managed by Training data set.

Your agency currently has no records assigned to this group.

There appear to be no records assigned to this group. You should be able to delete it at [Update "Postcards"](#).

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

Update New Group

There are 0 record(s) in this group.

Title	New Group
Caption	This is a collection of records b Correspondence of Agnes Macphail) Pictures of Scottish Cottages), o workflow (e.g. Records that need
Exclusive or shared group	<input type="radio"/> Exclusive: Group only contains Ti <input checked="" type="radio"/> Any Agency: Group available to a management interface (unless it is cl
Public display	<input checked="" type="radio"/> Yes <input type="radio"/> No If yes then this group will appear in the side pa for the purposes of data management.
Closed List	<input type="radio"/> Yes <input checked="" type="radio"/> No A closed list is one with a specific set number illustrations from a particular newspaper article available in selection lists for additional record
Delete List	A list can only be deleted when the last of the Records in this group.

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

[Delete New Group](#)