



AGENCY MANAGEMENT

VITA 6.1

UPDATED JANUARY 2020

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AGENCY MANAGEMENT ROLES & RESPONSIBILITIES

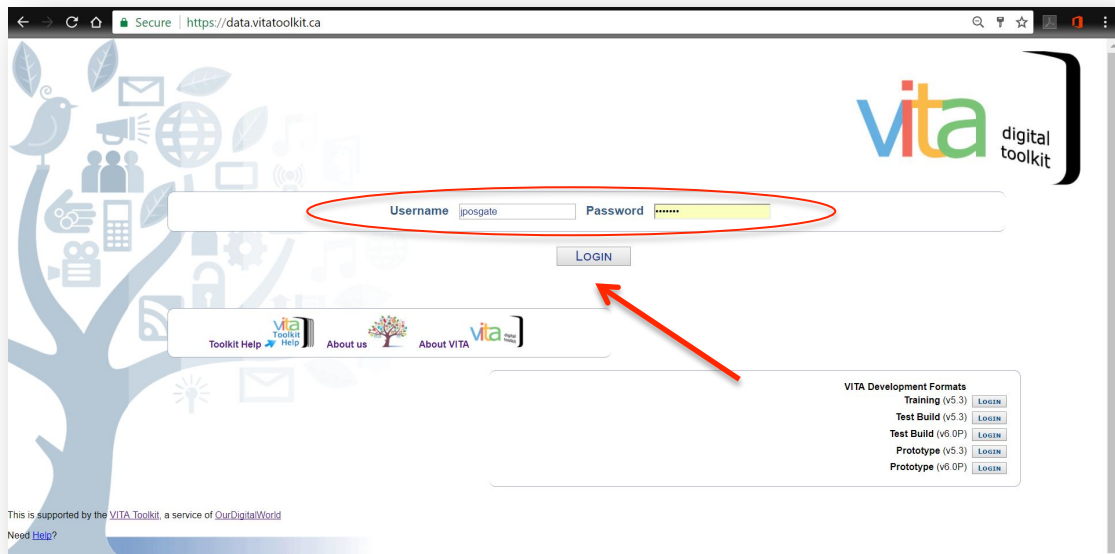
Any user with level 3 security can see and manage agency screens in VITA as well as any action items. With different subscriptions come different options within agency management. The Basic screens are available to everyone, extra features are available to Regular, Plus and Newspaper subscribers. Use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

LOGGING ON TO VITA

Access the login page at: <https://data.vitatoolkit.ca/>

Enter your username and password

Click the Big Login Button



MANAGING MULTIPLE AGENCIES

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. Use the link beside your username to "Switch Agency"

Select Agency

Jess Posgate [LOGOUT](#) [SWITCH](#)

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

- [Federated Women's Institutes of Ontario](#)
- [Lincoln Public Library](#)
- [Newmarket Public Library](#)
- [Ontario Library Association](#)
- [OurOntario.ca](#)

... or [log out](#)

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:

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 inde
- [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](#)

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.

INTRODUCTION



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.

AGENCY PROFILE: LABELS AND ADDRESSES

The agency label and addresses screen is used to record and update the name, contact information, social media connection, and web address for each agency that uses the VITA toolkit. A basic agency profile will be completed by OurDigitalWorld 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.

Labels and addresses	
Agency code:	FWIO
Agency setup date:	5 Jan 2016 14:03:04
Name of Agency:	Federated Women's Institutes of Ontario
Type:	Women's Institutes
Agency Email addresses:	<p>Public: <input type="text" value="fwio@fwio.on.ca"/></p> <p>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 ... should they want to order copies of things or seek permission to use records and images in specific ways.</p> <p>Feedback: <input type="text" value="digital@fwio.on.ca"/></p> <p>This address is never 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 has been submitted.</p>
Agency URL	<input type="text" value="http://www.fwio.on.ca"/> Test
Agency Twitter Account	<input type="text" value="@FWIOntario"/> <p>This account will be linked to any Twitter cards associated with your records and your sites. If someone tweets about one of your records it will show up in your agency's feed. Start with "@" e.g. "@ODWorg"</p>
Agency Address	<input type="text" value="552 Ridge Road
Stoney Creek, ON L8J 2Y6
905-662-2691"/>
Record Count	4747
Sites	<p><input checked="" type="radio"/> Federated Women's Institutes of Ontario Digital Collections</p> <p><input type="radio"/> Collections numériques de La Fédération des instituts des femmes de l'Ontario</p> <p><input type="radio"/> Women's Institutes Digital Collections Portal</p> <p><input type="radio"/> Portail pour les collections numériques des instituts des femmes</p> <p>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 OurOntario.ca.</p> <p>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.</p>
Language of Description	<p><input checked="" type="radio"/> English</p> <p><input type="radio"/> Français</p> <p>Select language <input type="text"/></p>
Vita Plan	<p>Type: News</p> <p>Level: All</p> <p>Plan last modified: 25 Jan 2018 10:38:56</p> <p>Modules:</p> <p>Statistics: Yes</p> <p>Web Pages: 10 pages</p> <p>Testimonials: Yes</p> <p>Video: No</p> <p>Video Streaming: No</p> <p>Audio: No</p> <p>Batch Templates: Yes</p> <p>Exhibits: Yes</p> <p>Postcards: Yes</p> <p>Podcasting: No</p> <p>Ships: No</p> <p>Allow Page PDF downloads: <input type="radio"/> No <input checked="" type="radio"/> Yes</p> <p>Require "Human" test for PDF downloads: <input checked="" type="radio"/> No <input type="radio"/> Yes</p> <p>Google Earth / KML: Yes</p> <p>Web crawler sitemaps: Yes</p> <p>Target url: http://collections.fwio.on.ca/sitemaps/FWIOSitemap_1.xml</p> <p>Sitemaps are discussed in webmaster tools at Google. We supply a Sitemap Index and link it from the robots.txt file so Google will find updates automatically. No manual steps are required.</p> <p>Note on removing pages from Google: See Google's Webmaster Tools FAQ</p> <p>Update Federated Women's Institutes of Ontario</p>

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: Add your organizational web address. This can be exposed on every public record (See the Site Management manual for option to turn “off” contact information on every record).

Agency Twitter Account: add your twitter handle here to enable sending Twitter Cards from your collection (See “Twitter cards in VITA” manual)

Agency address: Include the mailing address for organization. This can be included on every public record or not. To turn on/off contact information on records, have your Site Administrator change the settings by going to Site Management>Details page

Record count: A real-time number of records (public and non-public) in the agency’s collection.

Sites: Linked name of the site(s) to which this agency contributes records. The selected site determines the default view of the agency records, i.e. for previewing from 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: This shows the type of plan the agency subscribes (e.g. News, Media or All) to and which level (Limited, Basic, Standard, Plus, All). You will also see the modification dates for that subscription, and the available modules. These are assigned during initial set up.

Download PDFs setting: Implemented to thwart harvesting of newspaper pages, this is a setting for changing whether end users can download PDF pages (yes/no); if Yes, you can determine whether users need to confirm they are not a robot before the download will occur (Yes/No)

PERSONNEL (USER ACCOUNTS)

Agency managers can create, update and delete User accounts. 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.

Main Menu >> Update/Add Agencies >> Training data set: Personnel

Agency Setup		
Labels and addresses	Primary contact Jess Posgate jposgate@ourdigitalworld.org	UPDATE Login: jposgate3 Security Level (Role): 3 (Agency Manager) Site Manager: VITA Training Last Login: 6 Aug 2014 12:04:07 Login Count: 254 Date Added: 2 Oct 2011 18:28:32
Personnel	Spanish Translation	UPDATE Login: translate Security Level (Role): 3 (Agency Manager) Site Manager: VITA Espagnol Last Login: 18 Feb 2014 9:56:40 Login Count: 62 Date Added: 9 Aug 2013 13:24:29
Image options		
Copyright statements / Creative Commons		
"About" page		
Export options		
Usage statistics		
Checklists	Summer Student Temp student@youragency.com	UPDATE Login: sstudent Security Level (Role): 2 (User deletes) Date Added: 17 Sep 2013 13:17:36
Geography		
Media types		
Item types		
Creator / Contributor roles		
Newspapers		

ADD NEW USER

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

Add person

Name: **Email address:**

ADD/UPDATE USER ACCOUNT

Use this screen to create a user account 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 they will need to login to work with the collection, select Yes and click the update button.

Primary Contact: ☐ yes ☒ no

Name:

Title:

Address: Line 1

Line 2

City/Town:

Province/State

Country:

Postal Code:

Telephone:

Email: (limit 100 chars)

Login to this agency: ☒ yes ☐ no

Date User Added: 11 Oct 2011 15:52:43

[Update personnel file](#)

[DELETE PERSONNEL FILE](#)

When you click "Update personnel file" a second set of fields will appear to assign a login name, password, and security level.

Login to this agency: ☒ yes ☐ no

Login:

You must have a login value.

Password:

You need to add a password here
*Only enter something in the password field if you wish to **change** the password. Otherwise leave blank.*

Security Level:

☐ 3 (Agency Manager)

☐ 2 User (deletes)

☒ 1 User (no deletes)

You must set a security level.

Date User Added: 11 Oct 2011 15:52:43

[Update personnel file](#)

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 must be unique—enter first initial and last name

Generic usernames: use a unique 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 individual records, not including groups and exhibits, but not delete;
- Level 2 can create, edit and delete records, including groups and exhibits;
- Level 3 can create, edit and delete records as well as manage the agency profile and checklists (also required security before they can be made a Site Administrator)

DISAMBIGUATION

Any similarity between a new user’s full name, login name or email address will be identified within the entire user database and returned to you:

The screenshot shows a user registration interface with three existing users listed at the top, each with a red warning message: "This user is already assigned to Training data set".

Jess Posgate (jposgate3) Training data set (Login Count: 81) This user is already assigned to Training data set
Jess Posgate (jposgate) Training data set (Login Count: 100) This user is already assigned to Training data set
Training OO User (OOUser1) Training data set (Login Count: 0) This user is already assigned to Training data set

Below the list is a section titled "Add person" with a grey header. It contains two input fields: "Name:" with a yellow placeholder and "Email address:" with a white placeholder. To the right of the email field is a blue "Add" button.

This user is already assigned to AgencyName: Alerts you to existing accounts and to avoid duplication.

Jess Posgate (jposgate) Cook Memorial Public Library District (Login Count: 0) St. Jerome's University Library (Login Count: 0) Canadian Community Newspaper Finder (Login Count: 0) Niagara-on-the-Lake Public Library (Login Count: 0) Clarington Museum and Archives (Login Count: 0) Ontario Historical Society (Login Count: 0) This user is already assigned to Ontario Historical Society
Jess Posgate (jposgate3) Burlington Public Library (Login Count: 6) Add to Ontario Historical Society
Jess Posgate (jposgate1) OurOntario.ca (Login Count: 0) Add to Ontario Historical Society
Jess Posgate (jposgate2) OurOntario.ca (Login Count: 1) Add to Ontario Historical Society
Jess Posgate (jposgate3) OurOntario.ca (Login Count: 29) Add to Ontario Historical Society

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.

MANAGE EXISTING USER PROFILES

George Brown Volunteer 123-456-7890 gbrown@gmail.com , georgieboy@hotmail.com	<div> <div>UPDATE</div> <div> Login: gbrown Security Level (Role): 1 (User no deletes) Date Added: 11 Oct 2011 15:52:43 </div> </div>
--	---

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.

Full name: should be entered in natural order (i.e. John Smith)

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 OurDigitalWorld 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.

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 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.


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

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



IMAGES

There are a variety of image displays in VITA, depending on the file type that is uploaded and which size of presentation is being called. The following settings help you determine your preferences for your collection.

IMAGE SIZE AND OPTIONS

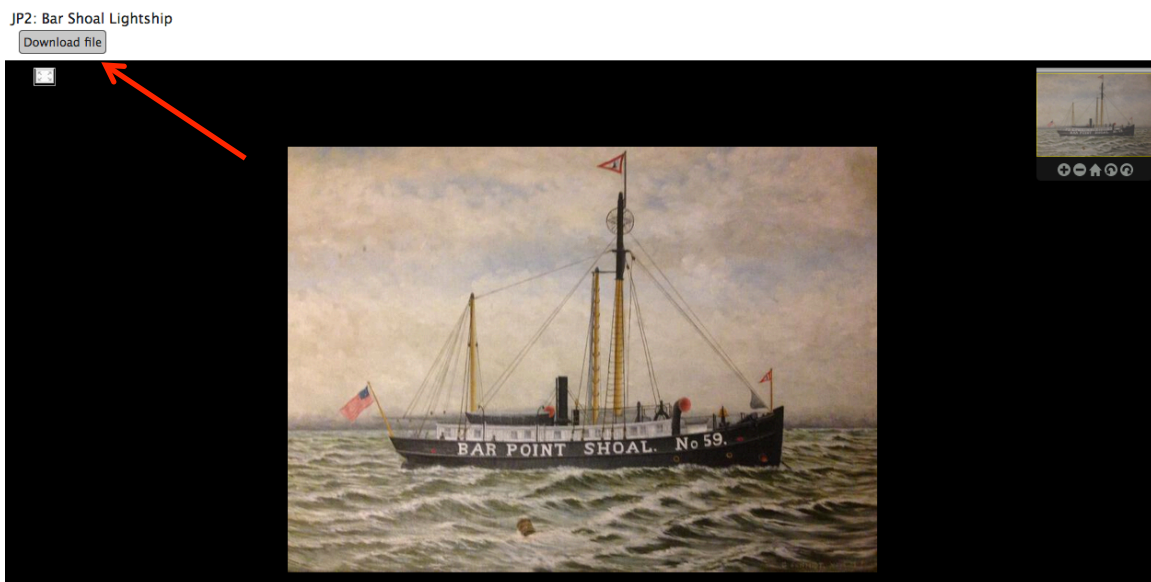
Zoom image download options

Most pan-zoom files are being loaded as JPG2000 files but there are still some legacy Zoomify files in the database. For either, there is an option to have a download view of a static JPG for those images. Zoomify files require Flash to display. For viewers who do not have Flash installed on their computers, we offer up a static JPG image file instead. The default setting is Yes.

If you want to suppress that alternate or downloadable file, you can toggle that choice here.

Permit downloads of zoomable images	<input checked="" type="radio"/> Yes <input type="radio"/> No
Note: For legacy Zoomify™ images, a "Yes" will present an alternate display link, which is a fundamental requirement for online accessibility. Choosing "No" means we cannot make your site compliant with various disability acts.	
Constrain zoomable sizes	<input checked="" type="radio"/> Allow the full range of alternate zoomable window sizes <input type="radio"/> Limit to only the two smaller sizes

Public view (JPG2000):



Constrain Zoomable Sizes

On display pages for zoomified files, the user is offered several alternate frame sizes, which you can allow (default Yes) or reduce to only the two smallest frame sizes.

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 Full Image options are where you can choose to not include a full size display for **all** the full size displays in your collection; 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.


Full sized image options	<p><input type="radio"/> Do not process full size (just thumbnail and regular size) There will be no full size</p> <p><input checked="" type="radio"/> Process full size and reduce to preferred full-size Unless a JPG 2000 (JP2) file, the full sized view will be converted, if necessary, to a JPEG and reduced, if necessary, to some number of pixels on its long side.</p> <p><input type="radio"/> Convert to Jpeg (if required) but don't reduce in size The full sized view will be converted, if necessary, to a JPEG but kept at its original size.</p>
---------------------------------	--


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]


Main Menu >> Search >> Results Add record
Page 1 of 2 1 2




Local Hero Banner
 Owen is a 'Local





 Sign commemorating Agnes Macphail is visible on Hwy 4 as you approach the village of Ceylon from the east. The former Macphail residence is located in Ceylon. Other signs are located at Six Corners, west of Ceylon and County Rd. 9, east of Hopeville.
Local Identifier: DM68



McPhail Family Headstone
 Photograph of the McPhail family tombstone in McNeil Cemetery, just south of Priceville. Agnes Macphail was buried here in 1964 alongside her mother, father and sister, Gertha.
Local Identifier: DM5

Local Hero Banner
Creator Name:
Mann, Donna
Creator Role:
Photographer
Media Type:
Image
Item Type:
Photographs
Description:
Banner displayed in downtown Owen Sound, represents Agnes Macphail as a 'Local Hero: Politician, Feminist, Reformer'.
Date of Original:
[n.d.]





Full

Image File Sizes

During your agency set up, talk to OurDigitalWorld staff about customizing the file sizes for each display option if necessary. The numbers here represent the default settings, measuring the long side of any image in pixels.

Image File Sizes		These and some other values relating to the storage and resizing of images are adjustable upon request.	
	Thumbnail	150	
	Regular	400	
	Full	1600	
	Reverse	800	
	Stereoview	1600	
	Detail	1600	
	Page	1000	

COPYRIGHT STATEMENTS/CREATIVE COMMONS

Agency Terms of Use

Use this field to assign a blanket Terms of Use to all records. These terms can be edited at the object level after creation.

Agency Terms of Use	
Terms of use	<input type="text"/> <p><small>Text entered here will appear in the terms of use area on the details screen. This is superseded when alternative terms of use have been entered in a specific record.</small></p>

Copyright Statements

Your organization is responsible for determining and assigning the copyright status of the objects in its collection. If no copyright status is assigned, the Default statement is "Copyright status unknown," and makes the user responsible for determining copyright.

The following Copyright statements can be edited to better suit your organization's international copyright laws and/or to assign a unique copyright statement. For all objects, provide Terms of Use and Reproduction information at the object level that suits the copyright status of each item before they become public.

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.

Copyright statements	
Public Domain text	Public domain: Copyright has expired according to Canadian law. No restrictions on use.
Copyrighted text	Protected by copyright: Uses other than research or private study require the permission of the <u>rights holder(s)</u> . Responsibility for obtaining permissions and for any use rests exclusively with the user.
Licensed text	Protected by copyright: Uses are subject to the terms of a license. Contact the repository for further information. Responsibility for any use rests exclusively with the user.
Contractual text	Protected by copyright: Uses are subject to the terms of a contract. Contact the repository for further information. Responsibility for any use rests exclusively with the user.
"Other" copyright text	
Default Copyright text	Copyright status unknown. Responsibility for determining the copyright status and any use rests exclusively with the user.
The text in this field will be supplied when no other value is available.	

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

ourdigitalworld.net/resources/copyright-faq/copyright-general-rules/

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 <http://creativecommons.org/>.

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.



Attribution only



Attribution-NoDerivatives



Attribution-NonCommercial-NoDerivatives



Attribution-NonCommercial



Attribution-NonCommercial-ShareAlike



Attribution-ShareAlike



Dedicated to or certified to be in the public domain

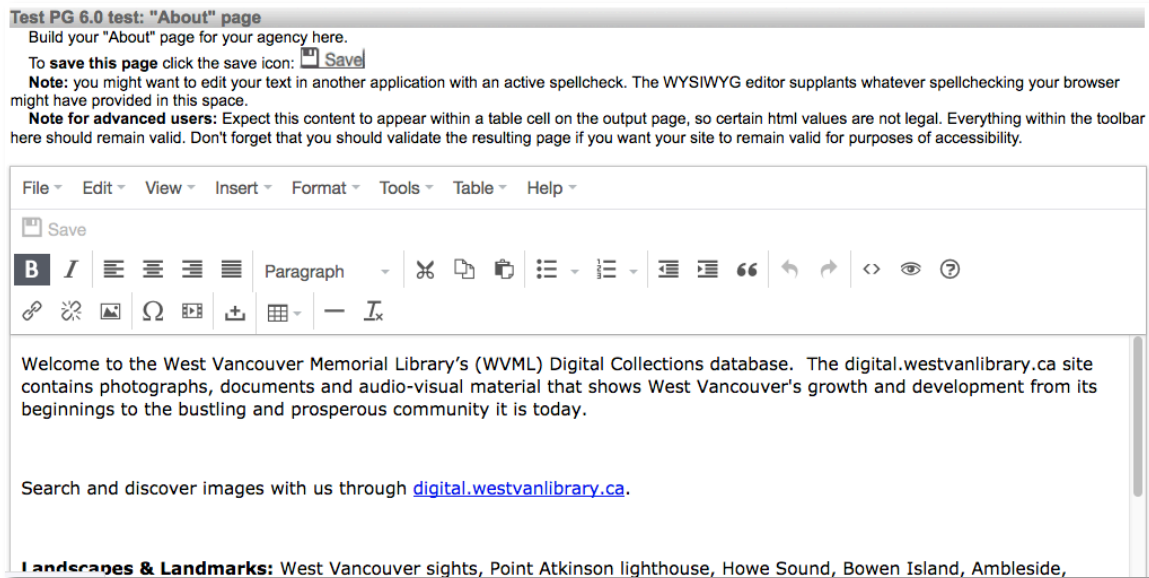
None = All rights reserved

Undecided, don't set a default

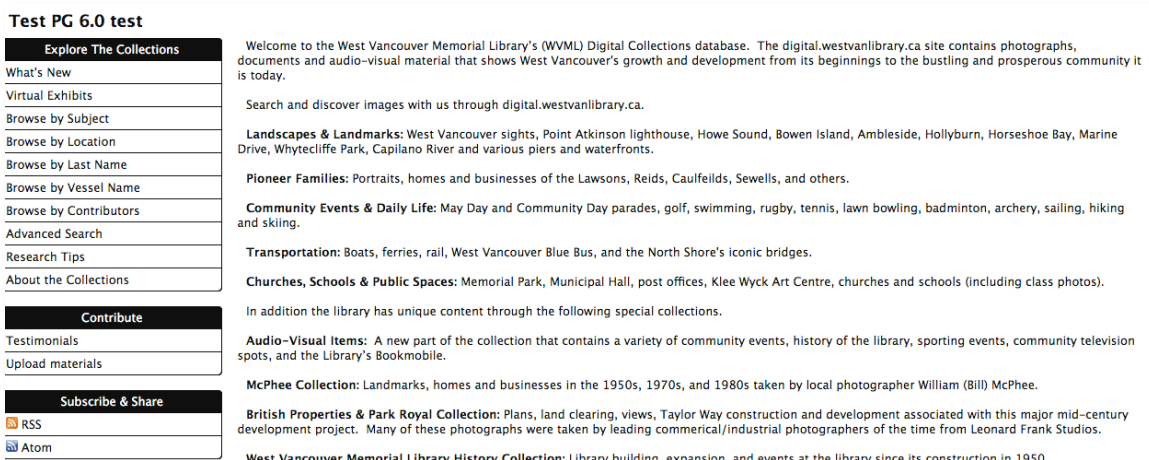
“ABOUT” PAGE

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

Use the WYSIWYG (What You See Is What You Get) editor to build a profile of your agency, digitization project, or about the site. E.g.



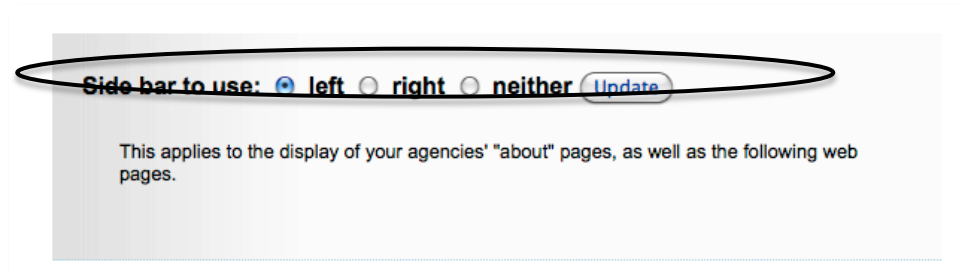
The result is a page with your default site branding and a customizable panel of information, links, graphics, etc. e.g.



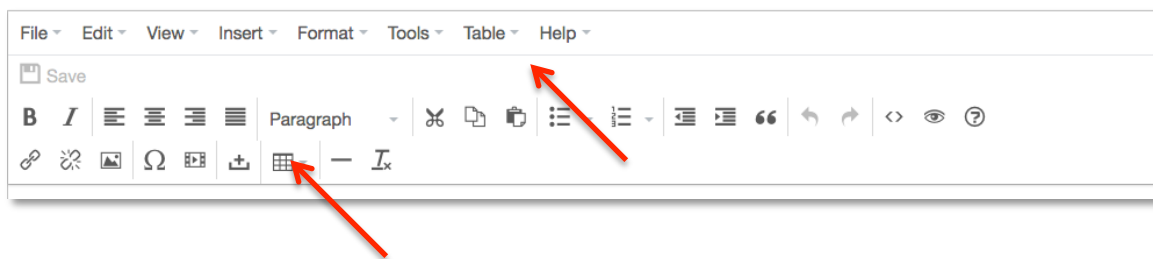
Please note the information on that screen about validating your HTML for accessibility purposes.

Sidebars on About Page: To include your sidebar for navigation purposes, save your About page text, go to Site Management, click on the “About page” or “Web pages” link and select which

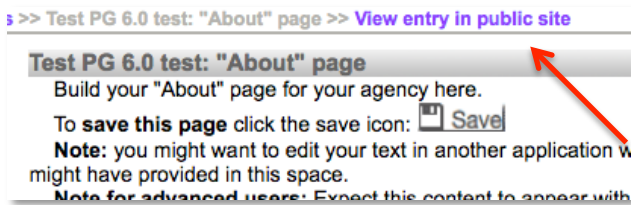
sidebar should appear (see the Site management manual). For information about creating sidebar content, see Site Management "Search page").



Use the options on the toolbar to insert a table to create a custom sidebar or navigation panel.



To link to your About page, first Preview the page...




Then copy the URL for that page (e.g. <http://test2.ourontario.ca/test60/about/a49>) and embed the link anywhere. To add it to your navigation sidebar, see Site Administration Manual, "Search page".

EXPORT DATA

Download a complete file of all your VITA records by selecting one of the export file options on this page. The file will be generated in XML (eXtensible Markup Language).

Export	
Notes	With a browser, we recommend you right click and "Save Link As ..." or "Save target as ...". Give the file an extension of ".xml", and if possible ensure it is saved with the character encoding of UTF-8.
Type of Export	VITA: All or Just public records Dublin Core : (Just public records)

Download options:

- **VITA All**—contains all the information from every field included in all your records, **public and non-public**
- **VITA Just Public Records**—contains all the information from every field included in all your **public** records
- **Dublin Core**—contains only the information from fields in your VITA records that are Dublin Core fields. These fields are marked by this symbol: 

Exporting data takes time. Depending on how large your collection is (how many records, and how complex they are) it may take an hour or three nights. Doing an export during high traffic time (i.e. during regular business hours when VITA is being used by many subscribers), it may also slow the tool down for everyone.

Recommended download procedure:

- **Do your export at the end of the day, but before midnight when our servers go into backup mode**
- **Right click** on the type of export file you want to download
- **“Save link as...”** to whatever directory makes sense for you
- **Add** the .xml extension to the file name
- **Save** with the character encoding of UTF-8 (if possible)

If you encounter a time-out, please contact help@vitatoolkit.ca and we will provide you with your record export.

Contact us for “Quick Inventory” exports, a file that contains the following fields:

- Title
- Primary media type
- VITA Record ID
- Local Identifier
- Date added
- Public Display status
- File name when uploaded

AGENCY CHECKLISTS

The following help you generate quick-pic checklists across your collection during data entry. Use these to identify commonly used geographic locations, media & item types and creator/contributor roles.

GEOGRAPHY

The Geographic data entered into any VITA record uses standard place names and locator specifications identified using the embedded [GeoNames](#) geographical database. The geography checklist can be set up according to your collection needs, and is meant to enable quick choices for data entry where common locations are assigned to records.

Predict international location checklist **without constraints**: Type in the desired place-name, wait for the spinning dial to appear and the dropdown list to generate, then select the location.

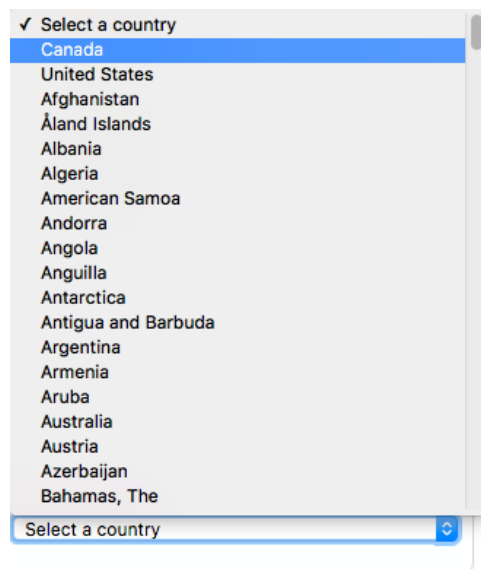
Note: this may be confusing, as many place names recur all over the world (e.g. see below). Consider constraining to the country (and state/province) you know is appropriate.



The screenshot shows a web form with the following elements:

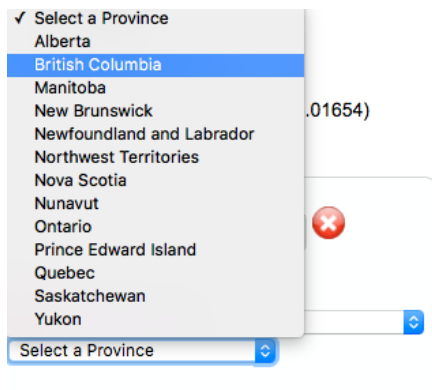
- Add place**: A text input field containing 'toledo' with a red 'X' icon to its right.
- Enter a m**: A label for the search input.
- Constrain**: A red label for a dropdown menu.
- Select a**: A label for a dropdown menu.
- Results list**: A list of search results for 'toledo' with their coordinates in parentheses:
 - Alejandro Toledo, Madre de Dios, Peru (populated place: -12.58061, -69.15936)
 - Almonacid de Toledo, Castille-La Mancha, Spain (populated place: 39.75445, -3.85242)
 - Almonacid de Toledo, Castille-La Mancha, Spain (third-order administrative division: 39.79754, -3.84305)
 - Antonio Toledo Corro, Sinaloa, Mexico (populated place: 24.61667, -107.37167)
 - Antonio Toledo Corro, Sinaloa, Mexico (section of populated place: 25.77591, -108.98043)
 - Archdiocese of Toledo, Castille-La Mancha, Spain (religious populated place: 39.85704, -4.02409)
 - Browns Corner, Indiana, United States (populated place: 40.81505, -85.41164)
 - Burguillos de Toledo, Castille-La Mancha, Spain (seat of a third-order administrative division: 39.79635, -3.99254)
- > Test PG 6.0**: A link at the bottom left.

Constrain the geo-search **by country**:



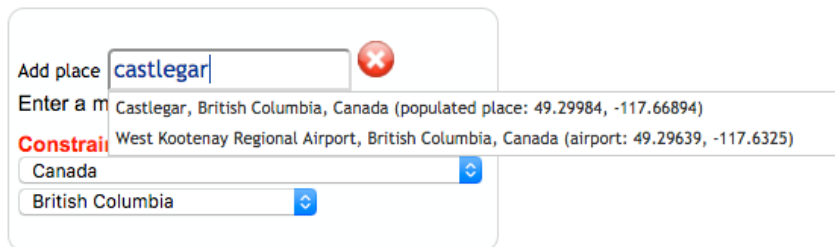
The screenshot shows a dropdown menu titled 'Select a country' with a list of countries. The countries listed are: Canada, United States, Afghanistan, Åland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda, Argentina, Armenia, Aruba, Australia, Austria, Azerbaijan, and Bahamas, The. The dropdown is currently open, showing the list of countries.

For Canada & United States, you can also constrain **by province or state**:



A screenshot of a web interface showing a dropdown menu for selecting a province or state. The menu is open, displaying a list of Canadian provinces and territories: Alberta, British Columbia (highlighted), Manitoba, New Brunswick, Newfoundland and Labrador, Northwest Territories, Nova Scotia, Nunavut, Ontario, Prince Edward Island, Quebec, Saskatchewan, and Yukon. Below the list is a button labeled 'Select a Province' with a downward arrow. To the right of the menu, a red 'X' icon is visible, and a partial view of another dropdown menu is shown.

Assign place names to the checklist by typing them into the input box and select the appropriate place from the supplied drop-down menu. Only places from the constrained regions will show in the drop down menu.



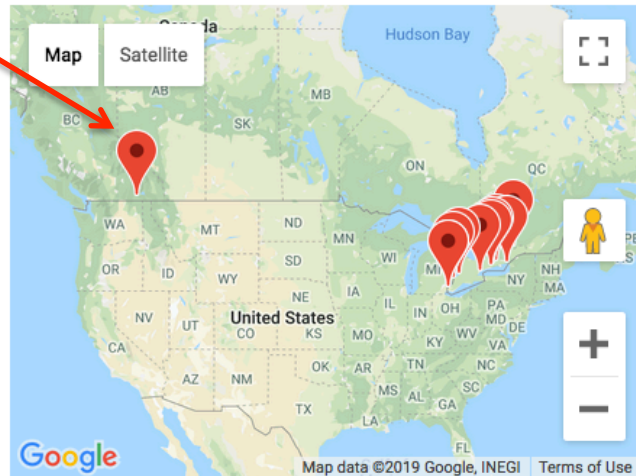
A screenshot of a web interface showing a form for adding a place. The 'Add place' input box contains the text 'castlegar' and has a red 'X' icon. Below the input box, a dropdown menu is open, showing a list of places: 'Castlegar, British Columbia, Canada (populated place: 49.29984, -117.66894)' and 'West Kootenay Regional Airport, British Columbia, Canada (airport: 49.29639, -117.6325)'. Below the dropdown menu, there are two buttons: 'Constrain' (highlighted in red) and 'Enter a m'. Below the buttons, there are two dropdown menus: 'Canada' and 'British Columbia', both with downward arrows.

The location will appear in the checklist on this screen, and as a pin on the map.


Save the checklist by clicking on the **update** button.

Agency Geographic Checklist


- ☒ Castlegar
British Columbia, Canada
populated place (49.29984, -117.66894)
- ☒ Cobourg
Ontario, Canada
populated place (43.95977, -78.16515)
- ☒ Detroit
Michigan, United States
populated place (42.33143, -83.04575)
- ☒ Eddystone
Ontario, Canada
area (44.06682, -78.01621)
- ☒ Grand Bend
Ontario, Canada
populated place (43.31678, -81.74978)
- ☒ Kingston
Ontario, Canada
area (44.23342, -76.4994)
- ☒ Ottawa
Ontario, Canada
capital of a political entity (45.42094, -75.69029)
- ☒ Pethericks Corners
Ontario, Canada
populated place (44.35333, -77.73389)
- ☒ Sarnia
Ontario, Canada



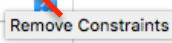
To remove the constraints, click the red X beside the existing constraints.

Add place 

Enter a minimum of three letters.

Constraints: British Columbia Canada 

Select a country



Setting default constraint: The constraints set in agency management become the default on data management “Geographical Data” screens, but can be overridden during data entry.

MEDIA TYPES

Predict the checklist of media types you will be uploading to your VITA collection. The selected media types will appear on the Add a Record screen and will determine the data input template for the record.







Additional media types (i.e. audio, video) are listed according to Subscriber plan. The screenshots below reflect a Basic plan list.

Select one media type as a default.

Click on the **update** button to add or remove media types from the checklist.

Remember:

- "Image" is the default media type if no other is selected
- After a record is uploaded, the media type of that record can be changed during data management in the descriptive data input screen
- Secondary media types are also selected during data management and are derived from this checklist

Type	Default	Alternates	Definitions	Default Thumbnail
Image	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	A static visual representation. Examples include paintings, drawings, graphic designs, plans and maps. Recommended best practice is to assign the type Text to images of textual materials.	
Text	<input type="radio"/>	<input checked="" type="checkbox"/>	A resource consisting primarily of words for reading. Examples include books, letters, dissertations, poems, newspapers, articles, archives of mailing lists. Note that facsimiles or images of texts are still of the genre Text.	
Object	<input type="radio"/>	<input checked="" type="checkbox"/>	An inanimate, three-dimensional object or substance. Note that digital representations of, or surrogates for, these objects should use Image, Text or one of the other types.	
Publication	<input type="radio"/>	<input checked="" type="checkbox"/>	Use for titles like newspapers or other serial publications to which individual records (clippings, articles) are going to be attached. Do not use this to manage individual digital texts. It is intended for fragments of issues or volumes.	
Genealogical Resource	<input type="radio"/>	<input checked="" type="checkbox"/>	Use for records that supply information on family events and relationships like births, marriages and deaths.	
Newspaper	<input type="radio"/>	<input checked="" type="checkbox"/>	Use, in addition to "text" for serials published at stated, frequent intervals, such as daily or weekly, and containing news, editorials, features, advertisements, and other items of current interest.	

Select the preferred default media type to be selected when users add a new record. This list of elements is derived from the [DCMI Type Vocabulary](#). You can also select multiple alternates from the second column.

[Update Training data set](#)

Add Record	
Title	<input type="text"/>
Media type	<input checked="" type="radio"/> Image <input type="radio"/> Text <input type="radio"/> Object <input type="radio"/> Publication <input type="radio"/> Genealogical Resource <input type="radio"/> Newspaper <input type="button" value="⌵"/>
Category	<input type="text" value="[Select one of the options below]"/> <input type="button" value="⌵"/>
Label	<input type="text"/> <input type="button" value="⌵"/>

ITEM TYPES

Predict the checklist of item types you will be commonly representing in your VITA collection. The item type checklists are assigned according to the primary media type selected for any given record. You should select Item Types for all available media types in your subscription plan.

Item types are based on authorized terms.

Select the media type you want the Item Type assigned to.

Start typing the item type. Choose appropriate term from drop down list.

Click on the **update** button to add the item type to the checklist.

The screenshot shows a web form titled "Add an Item type". At the top right is a button labeled "Add an Item type". Below the title is a label "... for which media type checklist:". Under this label are several radio buttons: "Image" (selected), "Text", "Video", "Object", "Audio", "Publication", "Genealogical Resource", "Newspaper", "Place", and "Ship". Below the radio buttons is a text input field containing the word "photograph". A dropdown menu is open below the input field, showing a list of suggestions: "Photograph albums [Image]", "Photograph cases [Image]", "Photographic postcards [Image]", "Photographic prints [Image]", and "Photographs [Image]". The last option, "Photographs [Image]", is highlighted with a yellow background. Below the input field and dropdown is a button labeled "Update Test PG 6.0 test". At the bottom of the form, there is a footer that reads "ent space is supported by the VITA Tool".

Item types can be assigned to more than one Media Type checklist; the suggested media type is listed with the Item type record in the drop down list.

Item types			
<input checked="" type="checkbox"/>	Audiocassettes		Audio
<input checked="" type="checkbox"/>	Cylinder recordings		
<input checked="" type="checkbox"/>	Phonograph records		
<input checked="" type="checkbox"/>	Clippings		Genealogical Resource
<input checked="" type="checkbox"/>	Drawings		Image
<input checked="" type="checkbox"/>	Maps		
<input checked="" type="checkbox"/>	Paintings		
<input checked="" type="checkbox"/>	Photographs		
<input checked="" type="checkbox"/>	Postcards		
<input checked="" type="checkbox"/>	Prints		
<input checked="" type="checkbox"/>	Stereographs		
<input checked="" type="checkbox"/>	Clippings		Newspaper
<input checked="" type="checkbox"/>	Issues		
<input checked="" type="checkbox"/>	Books		Object

Remember:

- Other item types can also be chosen during data entry in the descriptive data input screen according to available media types

CREATOR / CONTRIBUTOR ROLES

Predict the checklist of creator and contributor roles that are commonly applied to the objects in your VITA collection.

Add new roles to the checklist by using the input box and drop down menu. These will automatically be associated with certain media types.

Click on the **update** button to add the role name to the checklist.

Additional Creator/Contributor Roles	
<input type="text" value="author"/>	<p>Start the search. Keep typing to narrow the search. The "ID" of the role will appear in the dropdown menu.</p>
<div> <div>Author</div> <div>Author in quotations or text extracts</div> <div>Author of afterword, colophon, etc.</div> <div>Author of dialog</div> <div>Author of introduction, etc.</div> <div>Author of screenplay, etc.</div> </div>	
<input type="button" value="Update Test PG 6.0 test"/>	

Current checklists	
	Audio
<input checked="" type="checkbox"/>	Recording engineer
<input checked="" type="checkbox"/>	Singer
	Image
<input checked="" type="checkbox"/>	Cartographer
<input checked="" type="checkbox"/>	Engraver
<input checked="" type="checkbox"/>	Lithographer
<input checked="" type="checkbox"/>	Photographer
<input checked="" type="checkbox"/>	Surveyor
	Text
<input checked="" type="checkbox"/>	Author
<input checked="" type="checkbox"/>	Editor
	Video
<input checked="" type="checkbox"/>	Interviewee
<input checked="" type="checkbox"/>	Interviewer
<input checked="" type="checkbox"/>	Videographer

Remember:

- Creator and Contributor roles can also be added during data entry in the descriptive data input screen

NEWSPAPERS






For agencies managing full run newspaper collections, add a quick list of newspaper publications for easy selection when adding new issues.

Start typing existing publication titles and choose the correct one from the dropdown menu to add to your checklist

Additional Newspapers/Serials	fleshert
	Flesherton Advance

The title and it's thumbnail will automatically display in the checklist screen

Newspaper/Serial Checklist

Current checklist	
	<input checked="" type="checkbox"/> BeaverToo
	<input checked="" type="checkbox"/> Markdale Standard
	<input checked="" type="checkbox"/> New Tanner (Acton, ON)
	<input checked="" type="checkbox"/> Oakville Beaver (Test)
	<input checked="" type="checkbox"/> TannerHereToo
	<input checked="" type="checkbox"/> Flesherian Advance

The titles chosen on the Agency Management side will then display for easy selection on the Add Issue and Add BMD screens during Data Management:

[Main Menu](#) >> Add Newspaper Issue, Step 1

Add Newspaper issue, Step 1

Publication Title
<input type="radio"/> BeaverToo
<input type="radio"/> Flesherton Advance
<input type="radio"/> Markdale Standard
<input type="radio"/> New Tanner (Acton, ON)
<input type="radio"/> Oakville Beaver (Test)
<input type="radio"/> TannerHereToo

Enter publication:

Note: Publications in this context are specifically r
expected in this list, check that both of these value
Newspaper in "Media Asset"

[Main Menu](#) >> Add BMD Entry

Add BMD Entry

Publication Title
<input type="radio"/> BeaverToo
<input type="radio"/> Flesherton Advance
<input type="radio"/> Markdale Standard
<input type="radio"/> New Tanner (Acton, ON)
<input type="radio"/> Oakville Beaver (Test)
<input type="radio"/> TannerHereToo

Enter publication:

Note: Publications in this context are typically
publication isn't available **add it here first** ar

Publication Date: