



UPDATED JULY 2022

Introduction	3
Creating Groups.....	4
Creating A Group From The Main Menu	4
Creating A Group From The Groups Tab	5
Group Settings	9
Closed List	11
Delete List.....	12
Full Record	13
Add A Thumb & Regular Image.....	14
Description.....	16
Geography.....	20
Administrative	21
Groups	22
Links	22
Delete Group.....	23
Group Management.....	25
Update/Edit Group.....	25
Group Sort.....	28

INTRODUCTION

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

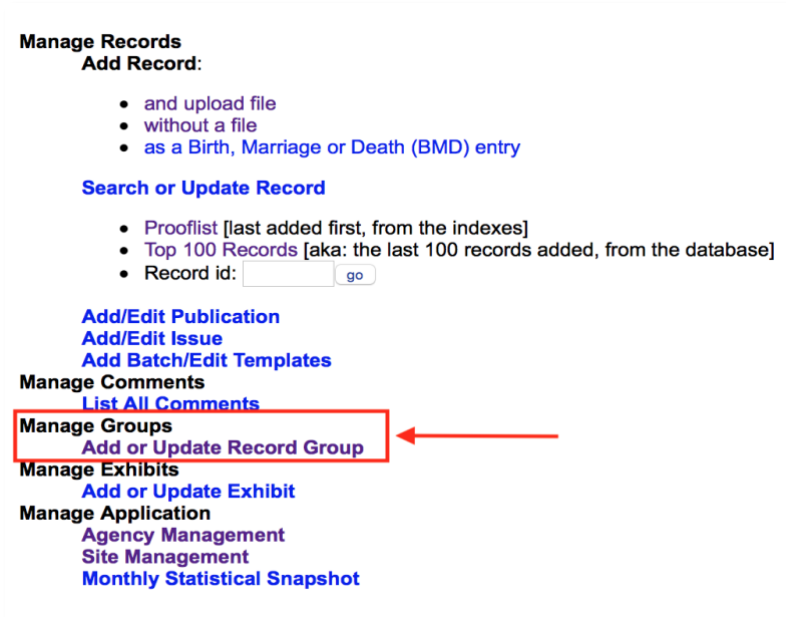
- Groups are “owned” by the agency that creates them
- Groups can be created on any topic that you think is relevant – i.e. Churches in the Niagara Region, Train Stations with Unique Architecture, My Favorite Pictures, etc.
- Groups and their content can be easily created, edited, and deleted by the 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

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 record workflow.

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.



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

You will see a list of all existing groups, and at the top 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](#)

Add New Group by entering Title : [Go!](#)

(50 characters max)

[Show All](#)

Name	Update	Has Records?	Public?	Open/Closed	Shared	Associate Agency
Regular Imports		Yes No	Public Non-Public	Open Closed	Shared Exclusive	
Abolitionists of Ontario: Fugitives & Freeman	Update	3	Public	Open	Exclusive	
Abolitionists: Grades 11-12	Update	6	Public	Open	Exclusive	
Abolitionists: Grades 9-10	Update	5	Public	Open	Exclusive	
Archives	Update	19		Open	Exclusive	
Contributions for OSW exhibits	Update	0		Open	Exclusive	
Contributions from VITA users	Update	0	Public	Open	Exclusive	
Cross-Ontario Exhibits	Update	30	Public	Open	Exclusive	

You will arrive on the Group Settings screen where you can determine how the groups you create will function.

CREATING A GROUP FROM THE GROUPS TAB

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

[Main Menu](#) >> [Search](#) >>

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

Jump to: [Statistics](#)

[Display](#) [File/Tech](#) [Description](#) [Geography](#) [Admin](#) [Groups](#) [Links](#) [Delete](#)

Alternate Views: [VITA](#), [Dublin Core](#), [MODS](#), [RSS](#), [Atom](#), [Solr](#)

Old Guelph


[Description](#) [Comments \(0\)](#)

Creators:
Jenny Irwin, Correspondent
Susan Daniel, Recipient

Media Type:
Image

Item Type:
Postcards

Description:



UPPER WYNDHAM STREET FROM ST. GEORGE'S SQUARE GUELPH

On the Groups tab 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.

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**

Add New Group by entering Title :

(50 characters max)

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 settings for and details about your group(s)

GROUP SETTINGS

Group Menu
Full record
Group settings
Show records
Sort records

Group Settings: New Group
There are 0 records(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
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 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
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

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

Main Menu >> Add / Update Groups

Add New Group by entering Title :

(50 characters max)
Go!
Reset

Name Regular Imports	Update	Has Records Yes No	Public Yes No	Closed Yes No	Shared Yes No	Associate Agency
Agnes Macphail Papers	Update	12	Public	Open	Exclusive	Associate Agency
Acton Tanner	Update	3		Closed	Exclusive	
Ambassador Bridge (Batch: 7 Sep 2017)	Update	0		Closed	Exclusive	
Boats and Ships	Update	12	Public	Open	Exclusive	
Boats and waterways	Update	43	Public	Open	Shared	
Community	Update	70		Open	Exclusive	
Death Notices	Update	20	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 selected records Select all records Unselect all records

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

Unassign selected records Select all records Unselect all records

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



CLOSED LIST

Group Settings: New Group

There are 0 record(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	<small>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.</small>
Delete List	<small>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.</small>

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

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.

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 (or "List") can only be deleted by the "owner" agency and only when all the records associated with it have been unassigned.

To deselect or unassign records in a group, click the link on this screen to view all records in the group.

always been a taboo topic for discussion in Soviet Ukraine. Tellingly, many of the records in this collection are attached with an expression of gratitude for the opportunity to speak to the issue. Some of the collection are attached.

This group is managed by **Test PG 6.0 test**.

There are **2** records from your agency in this group.

To unassign records from this group, check the checkbox in the left column below or click the "Select all records" button, and then click "Unassign selected records".

Your agency's records in this group

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

<input type="checkbox"/>	Letter from Lidiia Antonenko-Zhyrenko to Volodymyr Maniak
<input type="checkbox"/>	Maniak Collection - Translated

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

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

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

Records assigned to "Postcards"

Group Menu

- Full record
- Group settings
- Show records
- Sort records

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 [groupname]" link and a "Delete [groupname] Group" button will appear in the bottom left hand corner.

Update New Group

There are 0 records(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

☐ Exclusive: Group only contains T
☒ Any Agency: Group available to a
management interface (unless it is cl

Public display

☒ Yes
☐ No
If yes then this group will appear in the side pa
for the purposes of data management.

Closed List

☐ Yes
☒ 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

FULL RECORD

A full record is a searchable record and displays like other VITA records i.e. in results and as a Details screen.

Group Menu

Full record

Group settings

Show records

Sort records

A few notes about how to use the Full record:

Use the full record to explain the contents of the Group **as a unique, curated set of items**

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)

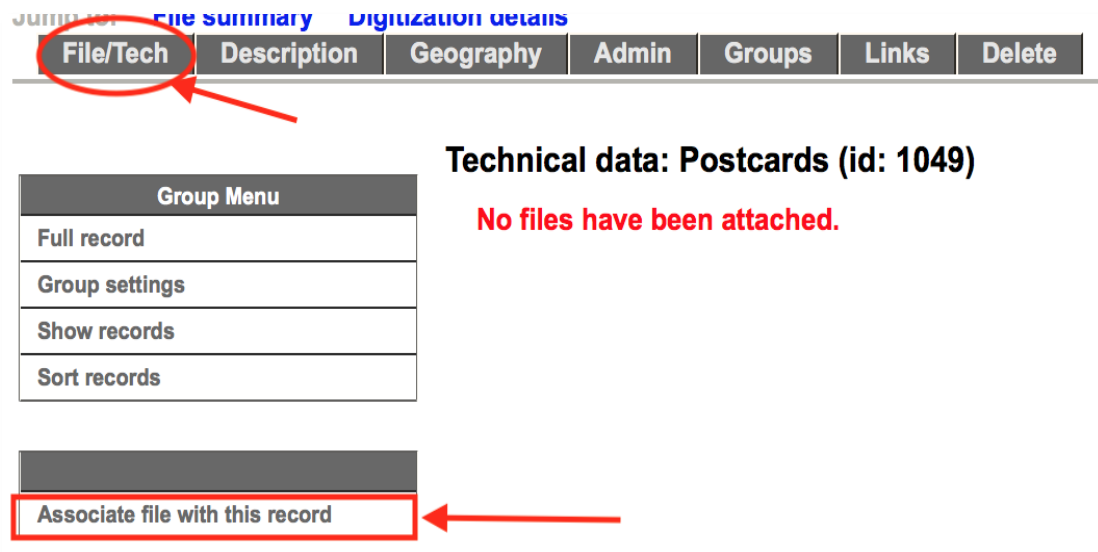
The workflow for setting up a full group record is exactly the same as it is when you add any type of record in VITA (see the Adding and Managing Records manual/video for more details).

ADD A THUMB & REGULAR IMAGE

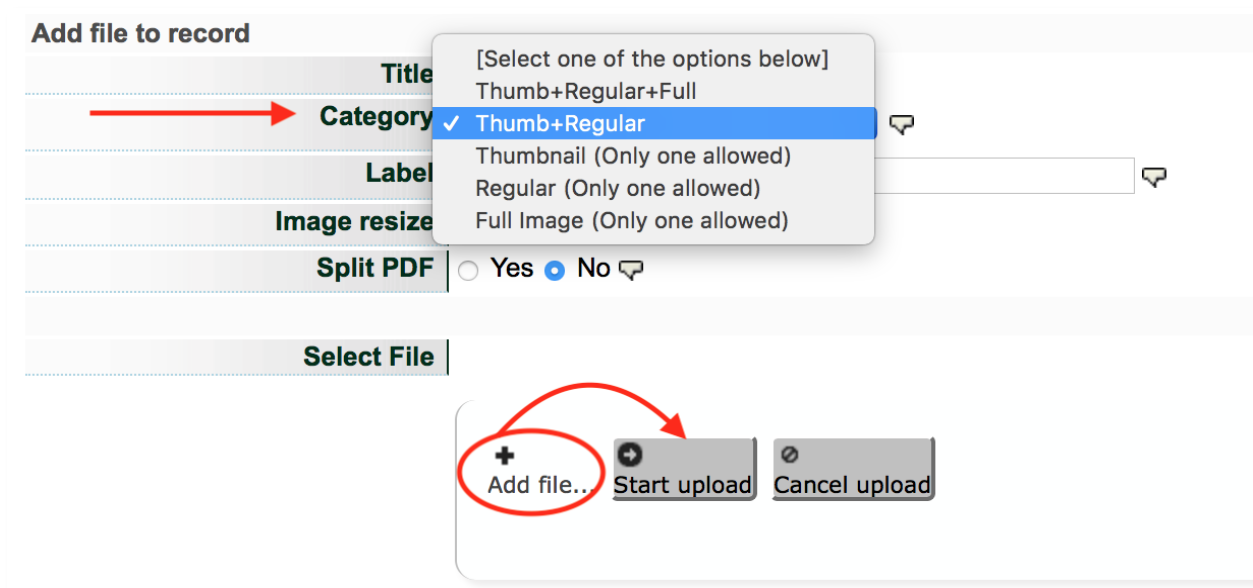
Group records display like any other item record in VITA, so choose an image for the **thumbnail** and **regular** display category to represent your Group in results sets and the Details screen. In results, a generic thumbnail is assigned if none is associated with the record.

In the details screen, no image appears unless a Regular image 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**:



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.



File summary

Thumbnail
File Exists: <https://data.vit toolkit.ca/Partners/Training/Train000001049t.jpg> [Details/Edit]

Regular
File Exists: <https://data.vit toolkit.ca/Partners/Training/Train000001049.jpg> [Details/Edit]

To order the links click and drag the thumbnail or sort icon up or down the list.

Associate another file with this record

Representative Image (Hero shot)

DESCRIPTION

Much like a record or an Exhibit record, the Description is the main point of access for end users' discovery of the Group.

Main Menu >> Search >>
Create new record: with uploaded file, without upload View entry in public site
Jump to: Subjects Dates

File/Tech Description Geography Admin Groups Links Delete

Group Menu

- Full record
- Group settings
- Show records
- Sort records

Descriptive Data: Postcards (id: 1049)

No files have been attached.
This Group record will not display in the Public Sites.

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:

☒ [n/a]

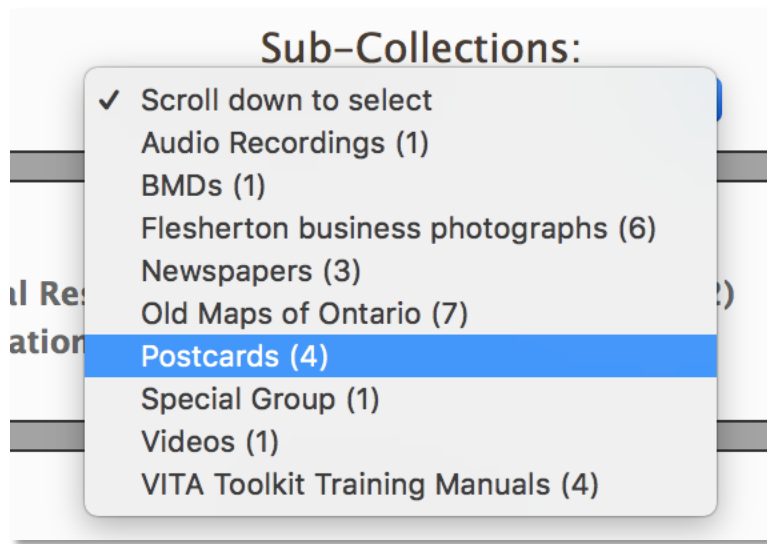
PUBLIC DISPLAY

Select **Yes** and this group will appear as a link 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.

PRIMARY MEDIA TYPE

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.

A screenshot of the 'Media Type to limit search to:' section in an Advanced Search interface. It features a row of radio buttons for different media types: Audio (2), Exhibits (1), Genealogical Resources (8), Groups (15) (which is selected), Image (32), Newspapers (10), Places (1), Publication (2), Text (26), and Video (6). To the right, there is a section for '... or Item Type to limit search to:' with a dropdown menu currently showing '[Scroll down to select]' and a blue arrow icon.

You can add multiple media and item types to better describe the group contents.

TITLE

The Title is carried forward from the Add/Update screen. You can edit it here.

OTHER METADATA

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 sample 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? ☒ Yes ☐ No [Help](#)

Media Type [Help](#)

Group [Help](#)
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](#)
Enter item type:

Title [Help](#)
Horticultural Society Collection

Public Display

Horticultural Society Collection

Description

Comments (0)

Media Type:

Group

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

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

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



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!

GEOGRAPHY

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

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

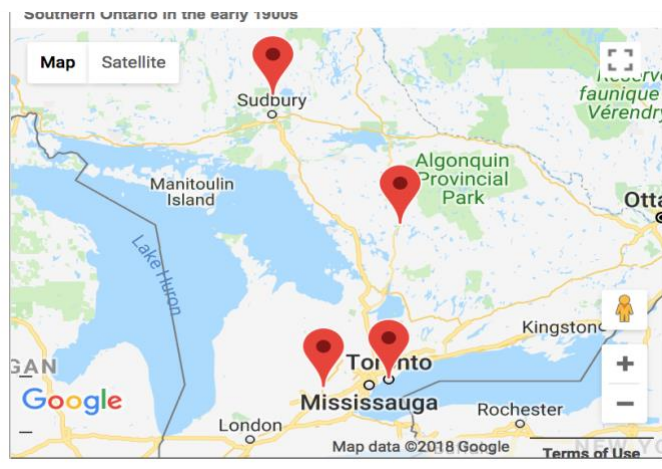
- ☒ **Capreol** [Edit](#)
Ontario, Canada
area (46.71678, -80.93304)
- ☒ **Guelph** [Edit](#)
Ontario, Canada
populated place (43.5501, -80.24967)
- ☒ **Huntsville** [Edit](#)
Ontario, Canada
populated place (45.33341, -79.21632)
- ☒ **Old Toronto** [Edit](#)
Ontario, Canada
populated place (43.64999, -79.38206)

Add place [X](#)

Enter a minimum of three letters.

Constraints: Ontario Canada [X](#)

Select a country [+](#)



ADMINISTRATIVE

Group records have a very brief template wherein the group record language(s), Creative Commons license, copyright status and copyright holder information can be captured.

Note: The group record is eligible for Creative Commons licensing if there is significant reworking of a collection or curative information around existing items.

Public Display? [Help](#)

☒ Yes ☐ No

Language of Description [Help](#)

☒ English
☐ Français
Add language
Hint: Capitalize language, e.g. "Spanish"

Location of original (private) [Help](#)

Location of original (public) [Help](#)

Permissions

Creative Commons Licence [Help](#)

☒ Attribution only [\[licence details\]](#)
☐ Attribution-NoDerivatives [\[licence details\]](#)
☐ Attribution-NonCommercial-NoDerivatives [\[licence details\]](#)
☐ Attribution-NonCommercial [\[licence details\]](#)
☐ Attribution-NonCommercial-ShareAlike [\[licence details\]](#)
☐ Attribution-ShareAlike [\[licence details\]](#)
☐ 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](#)

GROUPS

Like any record, you can add a Group record 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.

LINKS

This screen allows you to add links to other web pages from the record that are in some way associated with the digital file you are describing. These will appear as part of the publicly displayed record as linked text and with optional thumbnail images.

To add link(s) to your record, simply enter data into the 3 fields:

External Links

Link Management: Old Guelph (id: 1048)

Add new Link

→ Label:

→ URL:

→ Thumb:

Sort display order of links
Do this after other edits on the left panel

Label: Give your link a title. This is mandatory or else there will be nothing to display in the sidebar.

URL: Enter the destination URL of the website, page or VITA record you wish to associate with the record. This is mandatory for adding links.

Thumb (optional): If it is available, you can grab the link to the Image Location and enter it here. To do this, right click on the image you wish to attach, choose Copy Image Location from the drop-down list, and paste it into the Thumb field.

You may enter as many links as you like.

See the Adding & Managing Records manual for more details about adding and managing Links.

DELETE GROUP

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

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

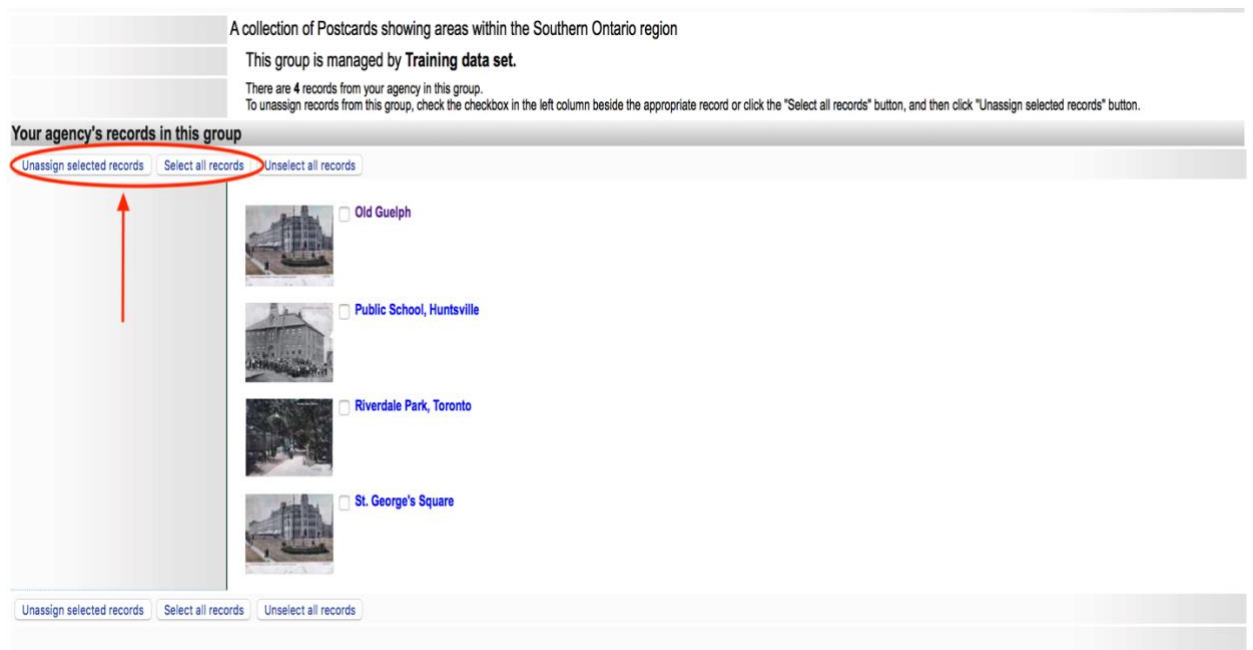
Create new record: [with uploaded file](#), [without upload](#) [view entry in public site](#)

[File/Tech](#) [Description](#) [Geography](#) [Admin](#) [Groups](#) [Links](#) [Delete](#)

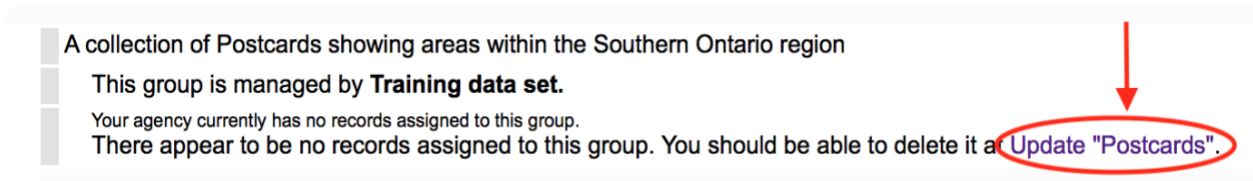
Group Menu	
Full record	<p>This collection includes 5 item(s). You must unassign those item records before deleting the collection record. See items here.</p> <p>Note: None of the records that you "linked" to this group will be deleted ... only the references from this group to them.</p> <p>Postcards</p>
Group settings	
Show records	
Sort records	

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

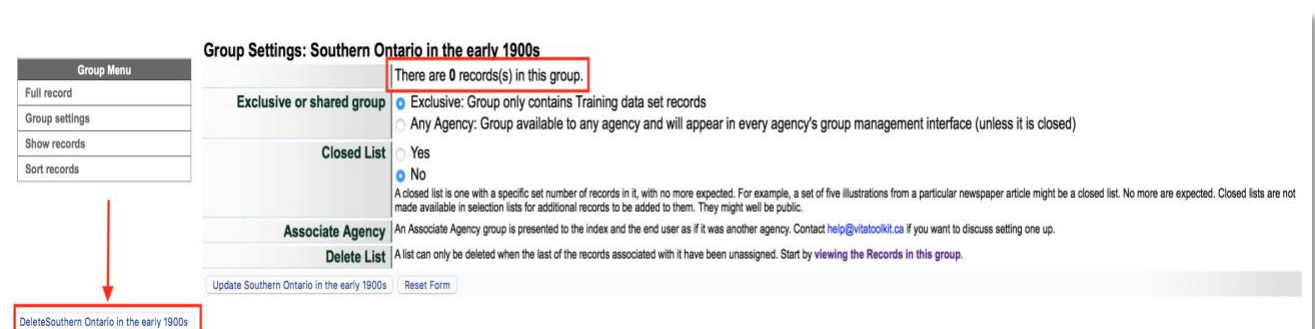
The Delete option on both Group Settings and Full Record screens will redirect you to unassign the contents first.



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



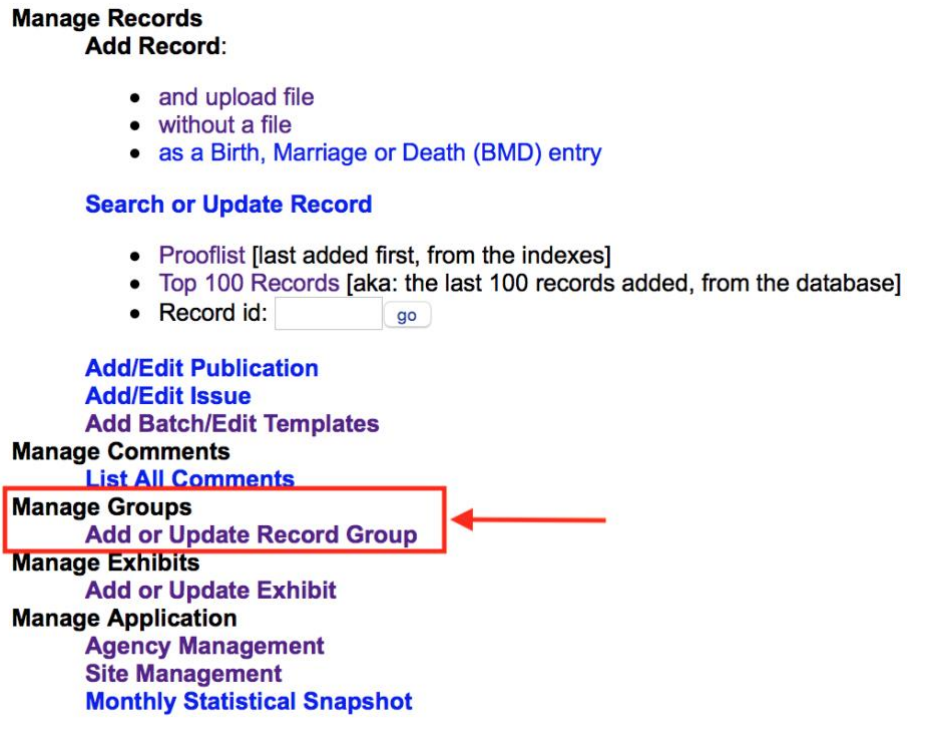
On the Group Settings or Group Record screen, the Delete button will appear:



GROUP MANAGEMENT

UPDATE/EDIT GROUP

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



The screenshot shows a web application menu titled "Manage Records". It contains several sections of links. A red rectangle highlights the "Add or Update Record Group" link under the "Manage Groups" section, with a red arrow pointing to it from the right.

- 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](#)
 - [Monthly Statistical Snapshot](#)

You will be presented with a list of groups created by your agency.

The default view is all "Regular" groups and their settings i.e. those created by your agency. If you have had batch imports done by ODW, you can toggle the first column to see those Import groups.

Sort the groups by whether a group has records or not; public/non-public groups; groups that are still open for new items or closed groups; whether the group is exclusive to your agency or shared.

To update or manage the group:

Main Menu >> Add / Update Groups

Add New Group by entering Title :

(50 characters max)

Name Regular Imports	Update	Has Records Yes No	Public Yes No	Closed Yes No	Shared Yes No	Associate Agency
Agnes Macphail Papers	Update	12	Public	Open	Exclusive	Associate Agency
Acton Tanner	Update	3		Closed	Exclusive	
Ambassador Bridge (Batch: 7 Sep 2017)	Update	0		Closed	Exclusive	
Boats and Ships	Update	12	Public	Open	Exclusive	
Boats and waterways	Update	43	Public	Open	Shared	
Community	Update	70		Open	Exclusive	
Death Notices	Update	20	Public	Open	Exclusive	

- Click Update

On 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) Update Group > 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 [Help](#)

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"

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

Your agency's records in this group

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

<input type="checkbox"/>		<input type="checkbox"/> Old Guelph
<input type="checkbox"/>		<input type="checkbox"/> Riverdale Park, Toronto
<input type="checkbox"/>		<input type="checkbox"/> St. George's Square
<input type="checkbox"/>		<input type="checkbox"/> United Church, Capreol Ontario

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

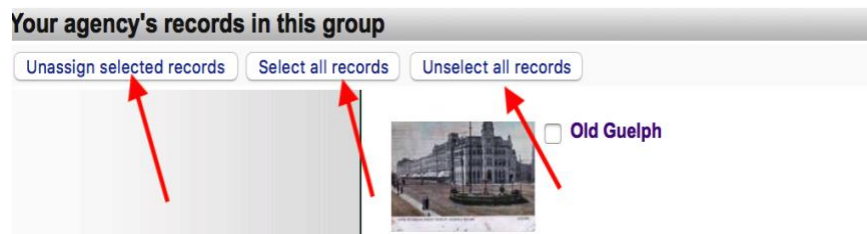
Use the checkboxes and buttons to select and/or unassign records from the Group.

To **un-assign** records from this group, use the checkboxes or “select all” button 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

- a) see what’s in your group
- b) de-select or “unassign” one or more items from the Group using the checkboxes and labeled buttons at the top and bottom of the screen



GROUP SORT

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

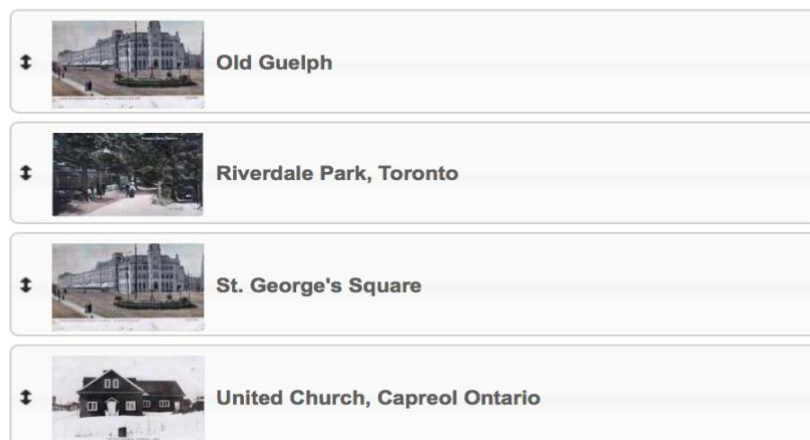
You might want the items of a group to appear in a specific order. You can order every item in the group to customize their display in the gallery and sidebar. This **fixes** their display order, however, so end users cannot re-sort those objects using other criteria.

Southern Ontario in the early 1900s

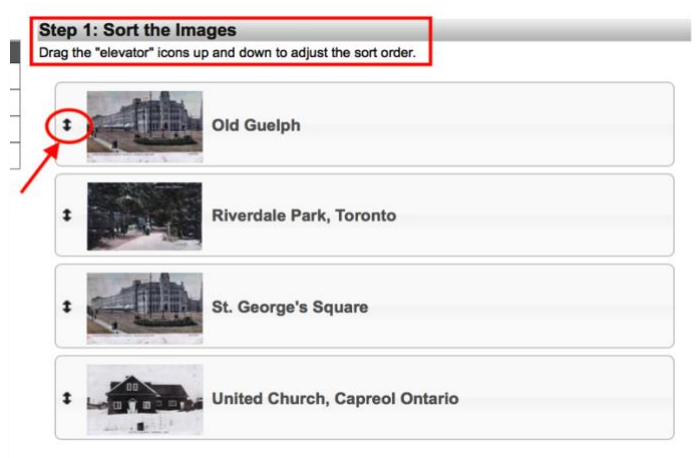
Group Menu
Full record
Group settings
Show records
Sort records

Step 1: Sort the Images

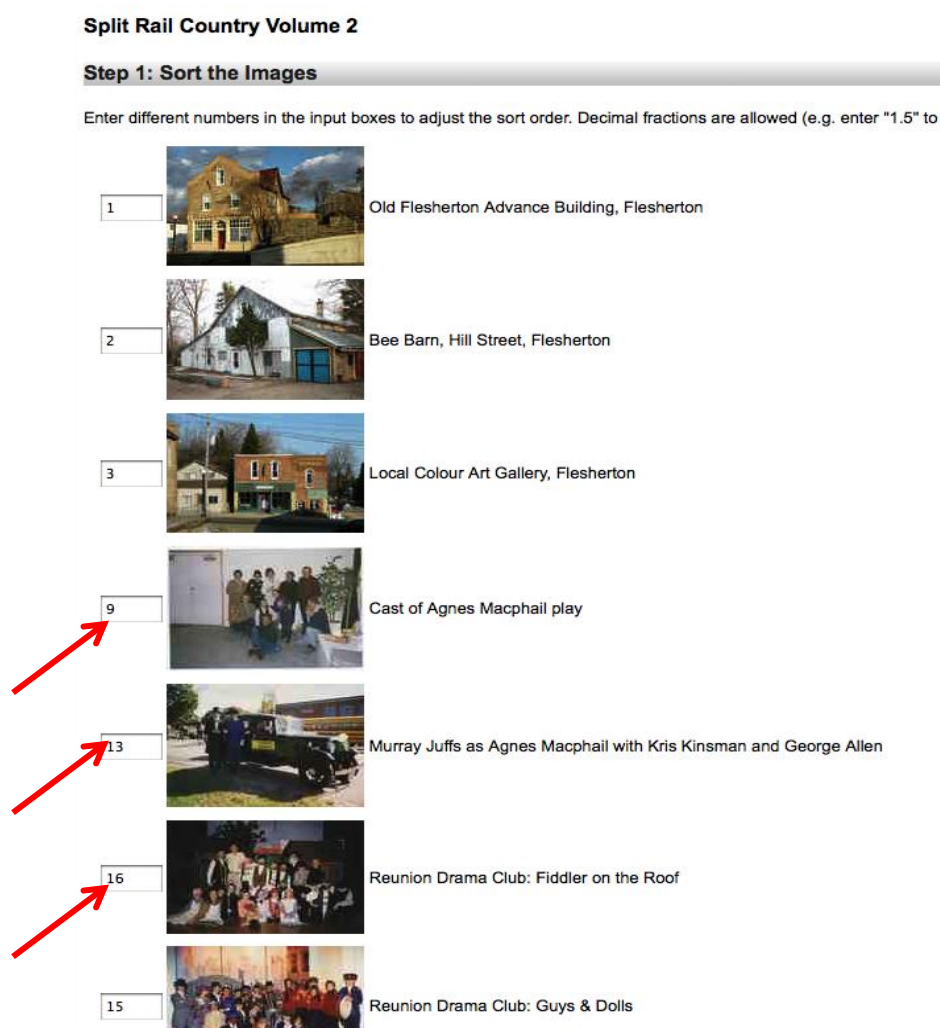
Drag the "elevator" icons up and down to adjust the sort order.



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.



After re-numbering your Group items, click on the "Update record order" button at the bottom of the screen



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.