



# MANAGING GROUPS

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VITA 6.5

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## INTRODUCTION

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

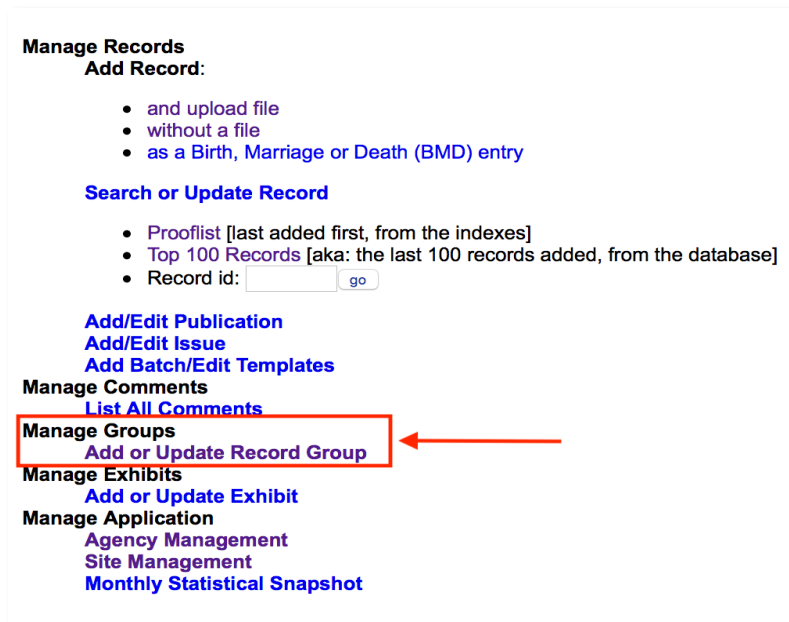
- Groups are “owned” by the agency that creates them
- Groups can be created on any topic that you think is relevant – i.e. Churches in the Niagara Region, Train Stations with Unique Architecture, My Favorite Pictures, etc.
- Groups and their content can be easily created, edited, and deleted by the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

(50 characters max)

[Show All](#)

Name <a href="#">Regular</a>   <a href="#">Imports</a>	Update	Has Records?		Public?		Open/Closed		Shared		Associate Agency
		Yes	No	Public	Non-Public	Open	Closed	Shared	Exclusive	
<b>Abolitionists of Ontario: Fugitives &amp; Freeman</b>	<a href="#">Update</a>		3	Public		Open		Exclusive		
<b>Abolitionists: Grades 11-12</b>	<a href="#">Update</a>		6	Public		Open		Exclusive		
<b>Abolitionists: Grades 9-10</b>	<a href="#">Update</a>		5	Public		Open		Exclusive		
<b>Archives</b>	<a href="#">Update</a>		19			Open		Exclusive		
<b>Contributions for OSW exhibits</b>	<a href="#">Update</a>		0			Open		Exclusive		
<b>Contributions from VITA users</b>	<a href="#">Update</a>		0	Public		Open		Exclusive		
<b>Cross-Ontario Exhibits</b>	<a href="#">Update</a>		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**

- [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)

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**

- 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**

**Add New Group by entering Title :**

(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
<b>Group settings</b>
Show records
Sort records

Group Settings: Abolitionists of Ontario: Fugitives & Freeman	
	There are 3 records in this group.
<b>Group Caption</b>	<input type="text"/>
	<small>A brief introduction to the group of records that will appear on the group list display. Longer explanations should be put in the Full Record Description or Notes and will appear on that tab.</small>
<b>Exclusive or shared group</b>	<input checked="" type="radio"/> Exclusive: Group only contains OurDigitalWorld 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)
<b>Closed List</b>	<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>
<b>Associate Agency</b>	<small>An Associate Agency group is presented to the index and the end user as if it was another agency. Contact <a href="mailto:help@vitaltoolkit.ca">help@vitaltoolkit.ca</a> if you want to discuss setting one up.</small>
<b>Delete List</b>	<small>A list can only be deleted when the last of the records associated with it have been unassigned. Start by <a href="#">viewing the Records in this group</a>.</small>
<input type="button" value="Update Abolitionists of Ontario: Fugitives &amp; Freeman"/> <input type="button" value="Reset Form"/>	

## ADD A CAPTION

One of the first options you have in group management is to add a caption to provide context to the records collected in the group. You can create a standalone caption or use part of your larger group Description (in the Full Record).

<b>Group Caption</b>	A package of handouts, assignment questions, and an answers sheet around abolitionists in Ontario's history. All the readings are taken from two abolitionist newspapers published in Ontario in the 1850s: the Voice of the Fugitive and the Provincial Freeman. Some of the readings are anonymous, and some have authors from Canada and the States.
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This will appear above the record gallery on the public site:

## Abolitionists of Ontario: Fugitives & Freeman

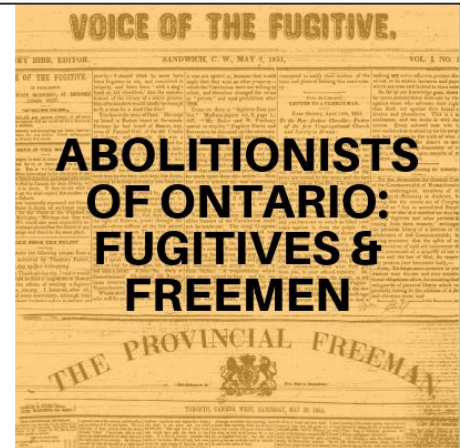
A package of handouts, assignment questions, and an answers sheet around abolitionists in Ontario's history. All the readings are taken from two abolitionist newspapers published in Ontario in the 1850s: the Voice of the Fugitive and the Provincial Freeman. Some of the readings are anonymous, and some have authors from Canada and the States.

Contents Description Discussion (0)

### Results

We found 3 matching items

✖ Folders: Abolitionists of Ontario: Fugitives & Freeman



## SHARED/EXCLUSIVE GROUP

Choose Exclusive or Any Agency on the setting screen to indicate whether this will be an exclusive or shared group.

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

This setting will show up as a sort option in your groups list.

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	<a href="#">Update</a>	12	Public	Open	Exclusive	Associate Agency
Acton Tanner	<a href="#">Update</a>	3		Closed	Exclusive	
Ambassador Bridge (Batch: 7 Sep 2017)	<a href="#">Update</a>	0		Closed	Exclusive	
Boats and Ships	<a href="#">Update</a>	12	Public	Open	Exclusive	
Boats and waterways	<a href="#">Update</a>	43	Public	Open	Shared	
Community	<a href="#">Update</a>	70		Open	Exclusive	
Death Notices	<a href="#">Update</a>	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

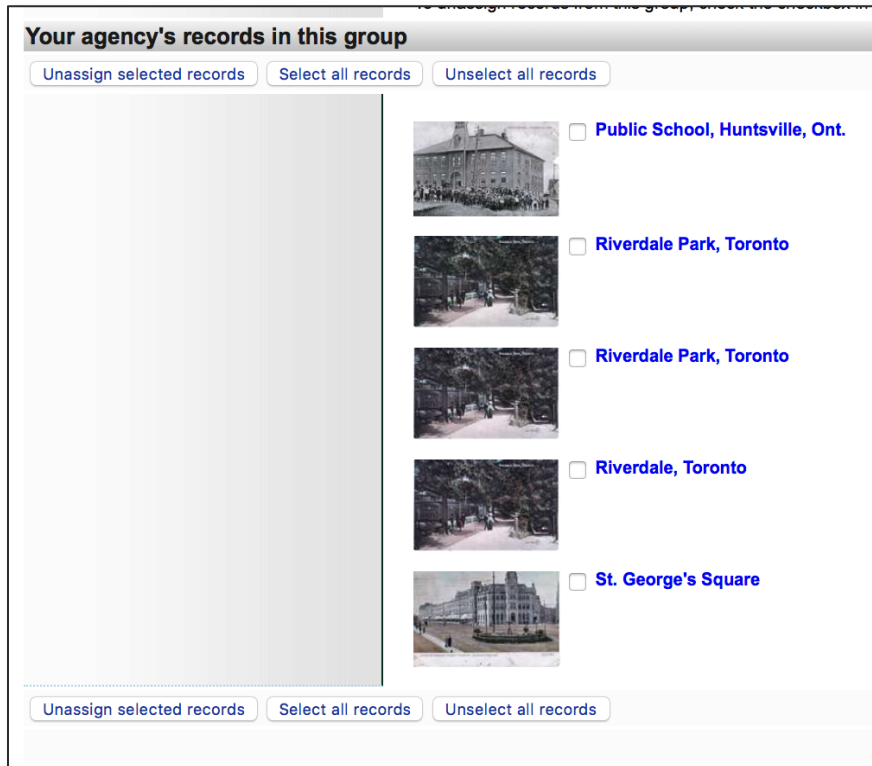
groups listings, but your exclusive groups will only appear in your agency's data management lists.

SHARED GROUPS are "owned" by the agency that creates the group, however the owner **cannot** choose which organizations to share records with; it is open to everyone using VITA.

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

The group itself cannot be deleted by any agency other than the "owner" and only after **all** records have been removed from the group.

In Show Records, the contributing agency has management options for their records i.e. select/unselect and un-assign options:



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



## CLOSED LIST

<b>Closed List</b>	<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>
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**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

<b>Delete List</b>	<small>A list can only be deleted when the last of the records associated with it have been unassigned. Start by <a href="#">viewing the Records in this group</a>.</small> <a href="#">Update Abolitionists of Ontario: Fugitives &amp; Freeman</a> <a href="#">Reset Form</a>
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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 unassign records in a group, click the “Show records” link in the sidebar to view all records in the group.

**Your agency's records in this group**

Unassign selected records   Select all records   Unselect all records

**Abolitionists: Activity Sheets**

**Abolitionists: Grades 11-12**

**Abolitionists: Grades 9-10**

Unassign selected records   Select all records   Unselect all records

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

Once all records have removed, the group can 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"](#).

Return to Group Settings,

Click on the "Update [groupname]" link

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

**Group Settings: User Contributions: Canadian Commun**

There are **0** records in this group.

**Group Caption**

**Exclusive or shared group**

Exclusive: Group only contains OurDigital  
 Any Agency: Group available to any agency's group management interface (unless...)

**Closed List**

Yes  
 No

**Associate Agency**

**Delete List**

Update User Contributions: Canadian Community Newspaper Finder    Reset Form

Delete User Contributions: Canadian Community Newspaper Finder

## 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)

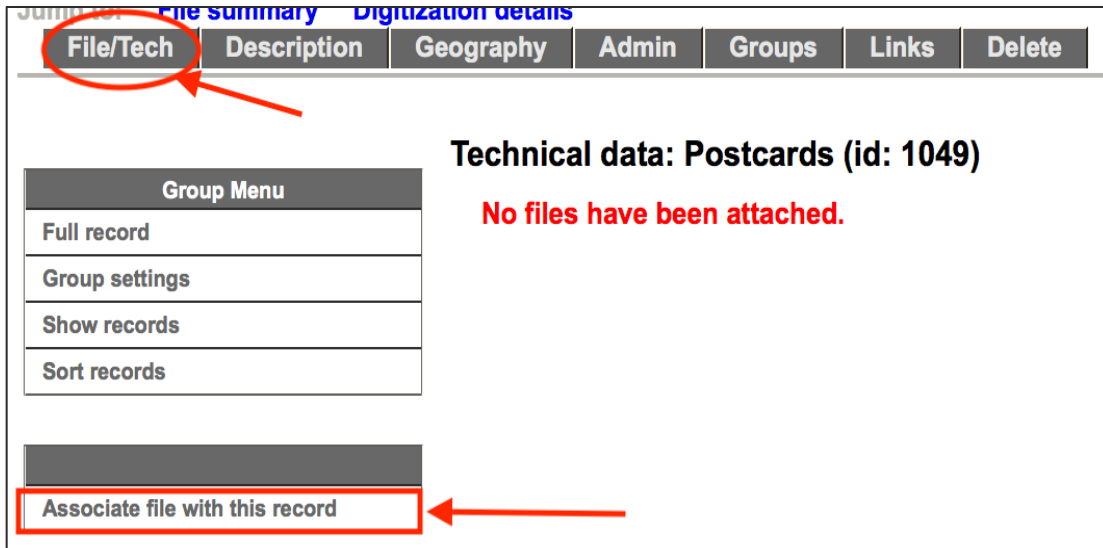
The workflow for setting up a full group record is exactly the same as it is when you add any type of record in VITA (see the Adding and Managing Records manual/video for more details).

## ADD A THUMB & REGULAR IMAGE

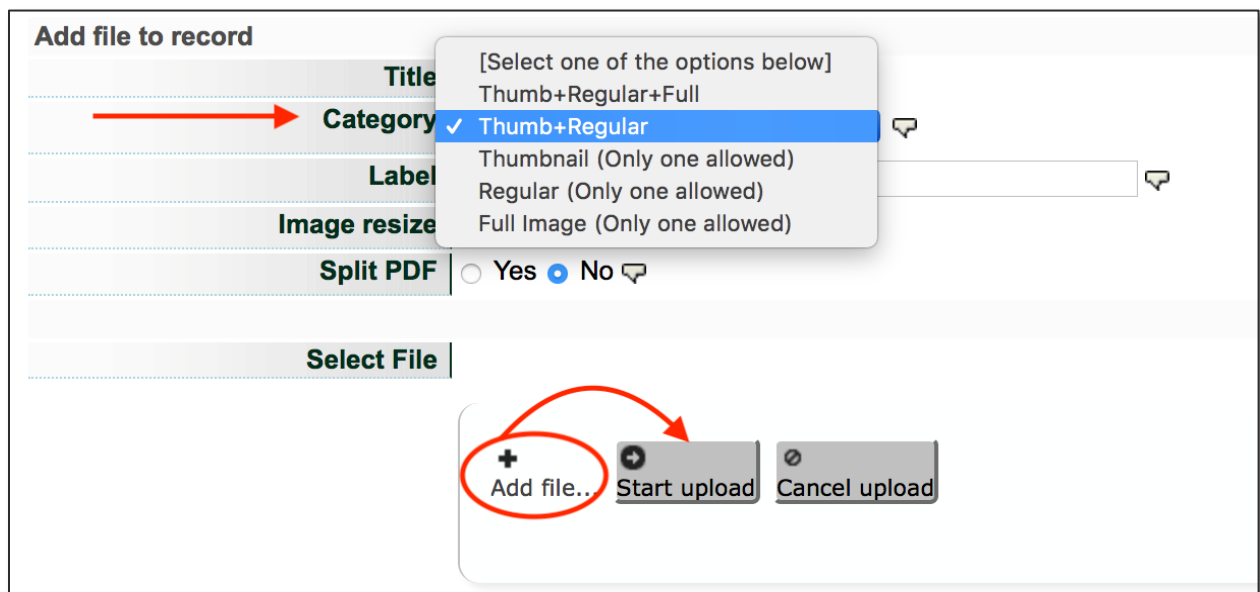
Group records display like any other item record in VITA, so choose an image for the **thumbnail** and **regular** display category to represent your Group in results sets and the Details screen. In results, a generic thumbnail is assigned if none is associated with the record.

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.





Associate another file with this record

### File summary

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

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

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

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]

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## PUBLIC DISPLAY

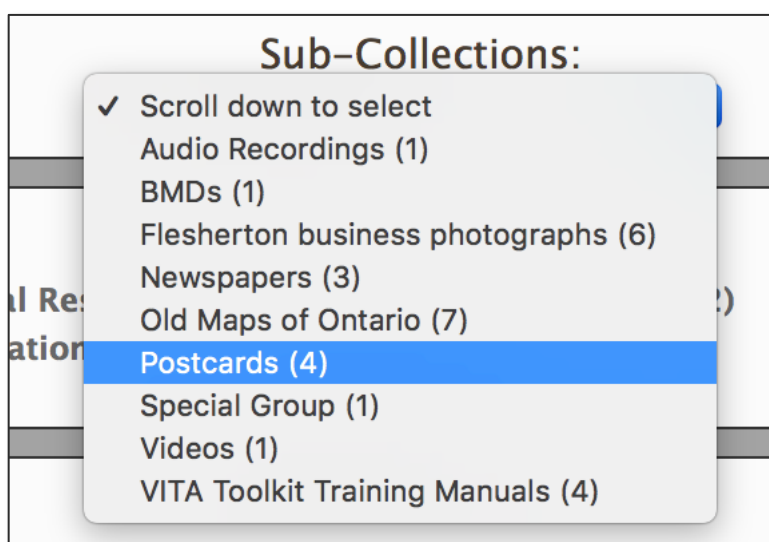
Select **Yes** and this group will appear as a link on the details screen for each of the records assigned to the group in both the public and data management displays.

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.

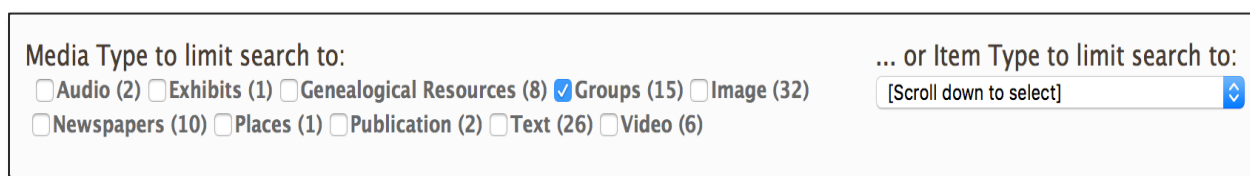
---

## 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 Advanced Search filter options. It shows two sections: "Media Type to limit search to:" and "... or Item Type to limit search to:". The "Media Type" section has several radio button options: "Audio (2)", "Exhibits (1)", "Genealogical Resources (8)", "Groups (15)", "Image (32)", "Newspapers (10)", "Places (1)", "Publication (2)", "Text (26)", and "Video (6)". The "Groups (15)" option is selected. The "Item Type" section has a dropdown menu with the text "[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):

The screenshot shows a metadata form with the following sections:

- Public Display?** with a **Help** button and radio buttons for  Yes and  No. A red arrow points to the 'Yes' radio button.
- Media Type** with a **Help** button.
- Group** with a **Help** button and a description: "This value determines a number of other options for this record." A red arrow points to the 'Group' label.
- Secondary Media Types** with a **Help** button and checkboxes for Image, Text, Video, Object, Audio, Genealogical Resource, Newspaper, and Place.
- Item Type** with a **Help** button and a text input field labeled "Enter item type:".
- Title** with a **Help** button and a text input field containing "Horticultural Society Collection". A red arrow points to the 'Title' label.

## 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

Map    Satellite



Google  
Imagery ©2018 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!

## GEOGRAPHY

Add one or more geolocations to inform the geo-search options on your results screens about your Group contents. See Adding and Managing records for more information on customizing group record Geography.

**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**

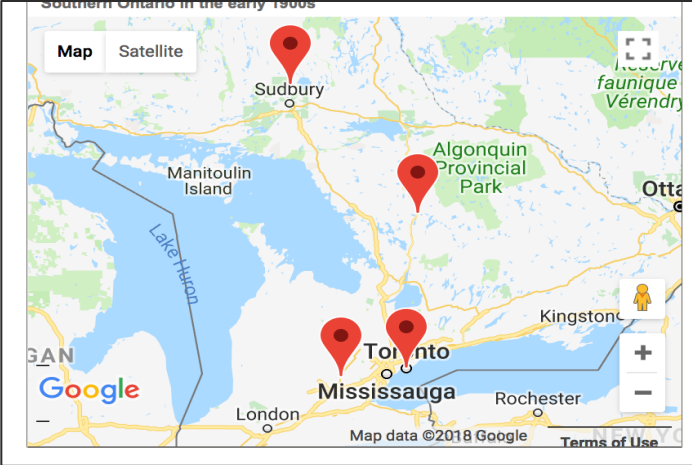
- Capreol** [Edit](#)  
Ontario, Canada  
area  
(46.71678, -80.93304)
- Guelph** [Edit](#)  
Ontario, Canada  
populated place  
(43.5501, -80.24967)
- Huntsville** [Edit](#)  
Ontario, Canada  
populated place  
(45.33341, -79.21632)
- Old Toronto** [Edit](#)  
Ontario, Canada  
populated place  
(43.64999,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

**Add place**  [✖](#)

Enter a minimum of three letters.

**Constraints: Ontario Canada** [✖](#)

Select a country



## 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**

- [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**

**Add New Group by entering Title :**

(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.

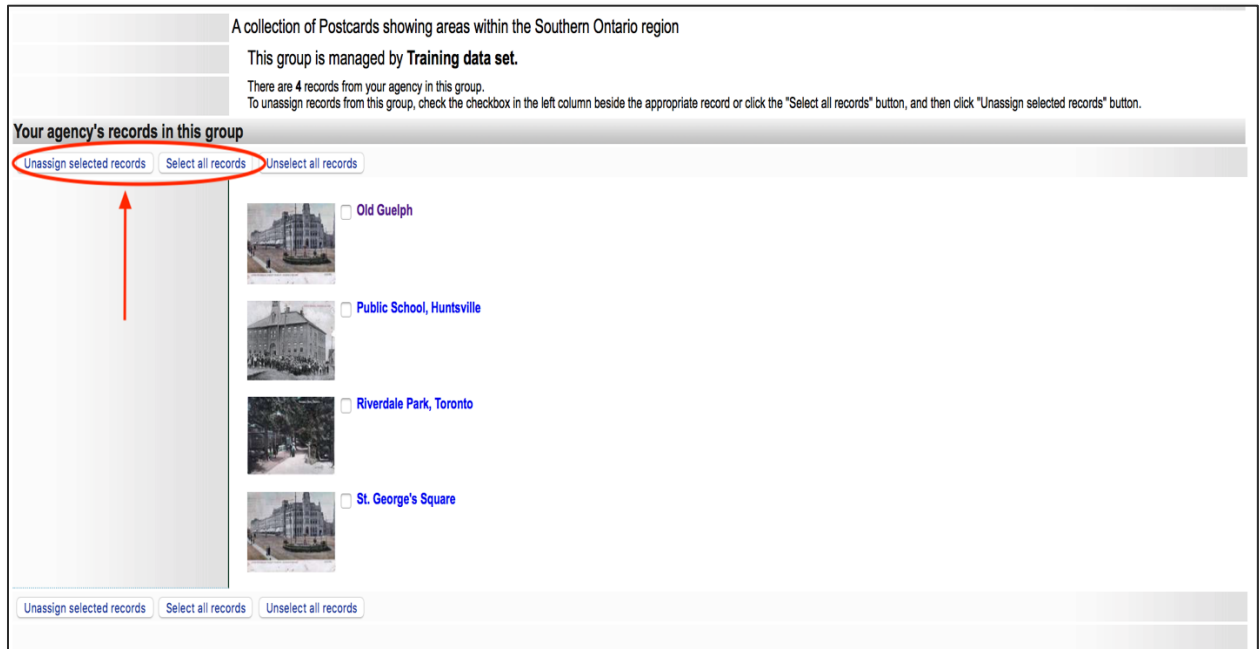
create new record: [with uploaded file, without upload](#) [view entry in public site](#)

File/Tech	Description	Geography	Admin	Groups	Links	<b>Delete</b>
-----------	-------------	-----------	-------	--------	-------	---------------

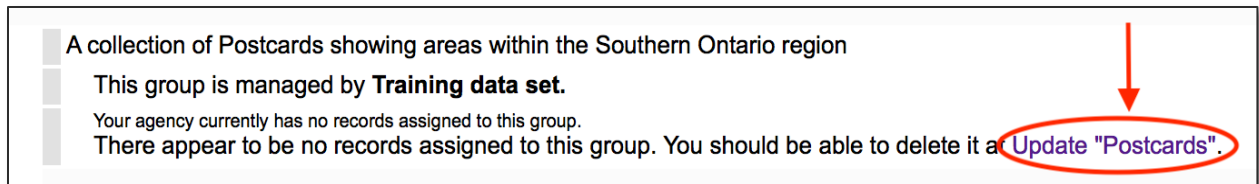
<b>Group Menu</b>	<p><b>This collection includes 5 item(s). You must unassign those item records before deleting the collection record. See items here.</b></p> <p><b>Note:</b> None of the records that you "linked" to this group will be deleted ... only the references from this group to them.</p> <p>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

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

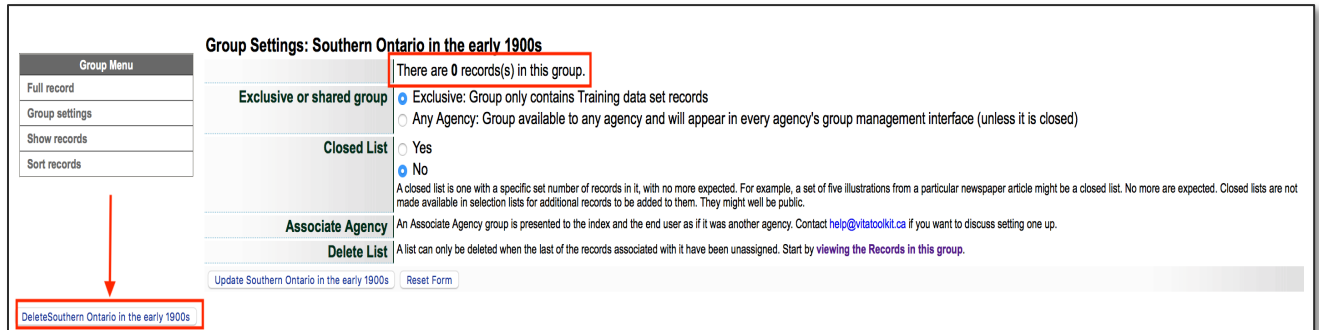
The Delete option on both Group Settings and Full Record screens will redirect you to unassign the contents first.



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



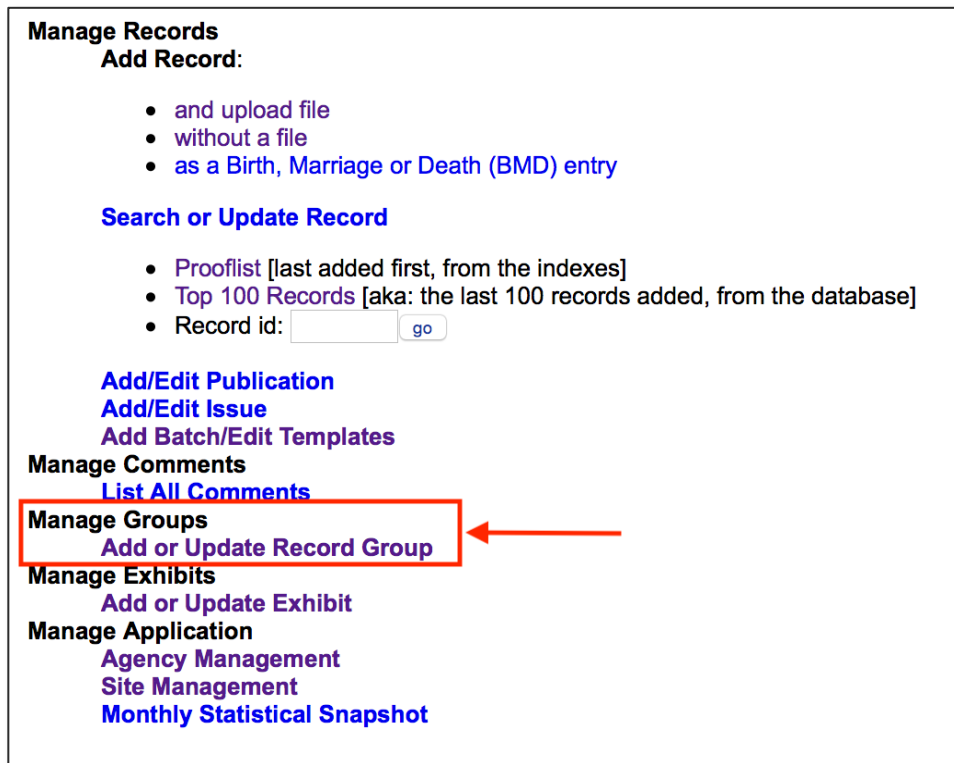
On the Group Settings or Group Record screen, the Delete button will appear:



## GROUP MANAGEMENT

### UPDATE/EDIT GROUP

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



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

**Group Menu**

- Full record
- Group settings
- Show records
- Sort 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


**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

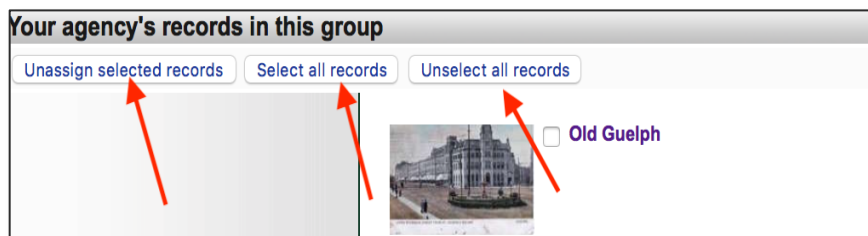
Use the checkboxes and buttons to select and/or unassign records from the Group.

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

⇅
Old Guelph

⇅
Riverdale Park, Toronto

⇅
St. George's Square

⇅
United Church, Capreol Ontario

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

**Step 1: Sort the Images**  
 Drag the "elevator" icons up and down to adjust the sort order.

⇅
Old Guelph

⇅
Riverdale Park, Toronto

⇅
St. George's Square








⇅
United Church, Capreol Ontario

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

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

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

<input type="text"/>		Test
<input type="text"/>	test map	test map
<input type="button" value="Update record order"/>		

**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.