



# AGENCY MANAGEMENT

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VITA 6.5

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## AGENCY MANAGEMENT ROLES & RESPONSIBILITIES

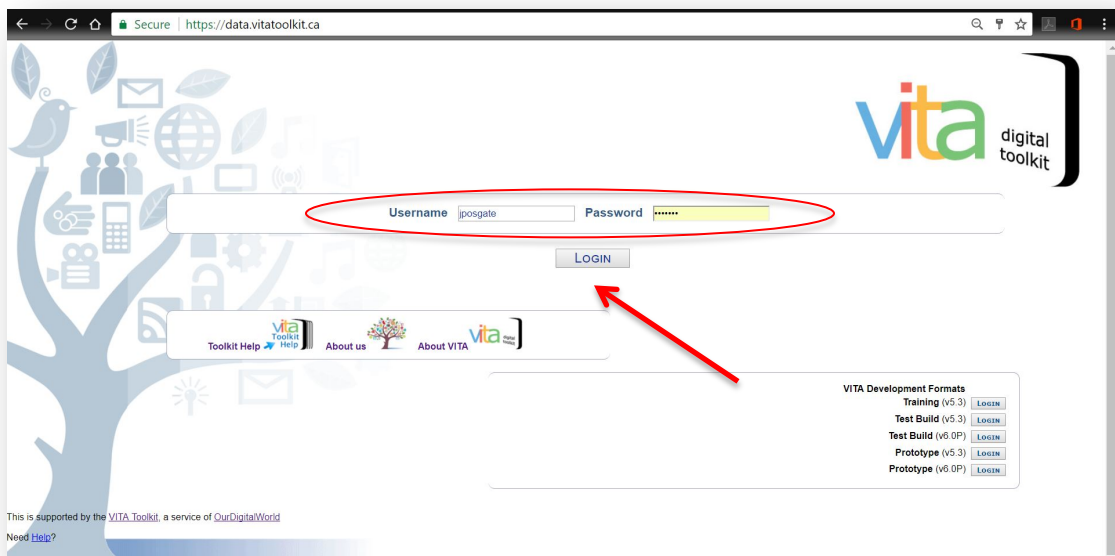
Any user with level 3 security can see and manage agency screens in VITA as well as any action items. With different subscriptions come different options within agency management. The Basic screens are available to everyone, extra features are available to Regular, Plus and Newspaper subscribers. Use 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.vitacoolkit.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"

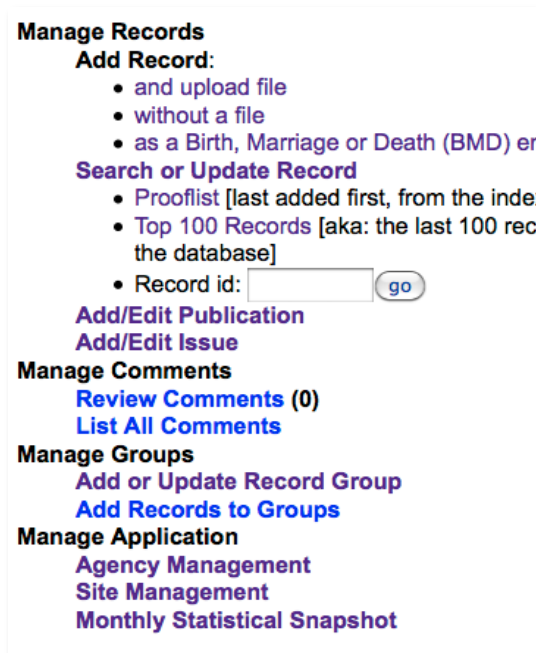


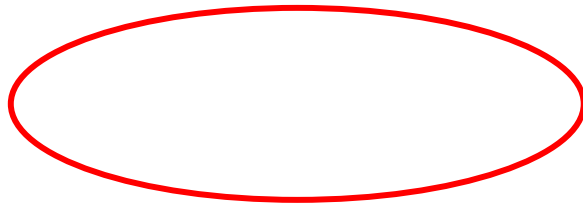
Once you click on the login button, you will be presented with the Main Menu.

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:





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

<b>Agency Setup</b>
Labels and addresses
Personnel
Image options
Copyright statements / Creative Commons
"About" page
Export options
<b>Checklists</b>
Geography
Media types
Item types
Creator / Contributor roles
Newspaper/Volume titles

What is an "Agency"? In VITA, an Agency is the person or organization that subscribes to a VITA plan and 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	
<b>Agency code:</b>	FWIO
<b>Agency setup date:</b>	5 Jan 2016 14:03:04
<b>Name of Agency:</b>	Federated Women's Institutes of Ontario
<b>Type:</b>	Women's Institutes
<b>Agency Email addresses:</b>	<p><b>Public:</b> <input type="text" value="fwio@fwio.on.ca"/>            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><b>Feedback:</b> <input type="text" value="digital@fwio.on.ca"/>            This address is <b>never</b> 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>
<b>Agency URL</b>	<input type="text" value="http://www.fwio.on.ca"/> <a href="#">Test</a>
<b>Agency Twitter Account</b>	<input type="text" value="@FWIOntario"/> 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"
<b>Agency Address</b>	<input type="text" value="552 Ridge Road &lt;br/&gt; Stony Creek, ON L8J 2Y6 &lt;br/&gt; 905-662-2691"/>
<b>Record Count</b>	4747
<b>Sites</b>	<input checked="" type="radio"/> Federated Women's Institutes of Ontario Digital Collections <input type="radio"/> Collections numériques de La Fédération des instituts des femmes de l'Ontario <input type="radio"/> Women's Institutes Digital Collections Portal <input type="radio"/> Portail pour les collections numériques des instituts des femmes 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. 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.
<b>Language of Description</b>	<input checked="" type="radio"/> English <input type="radio"/> Français Select language <input type="text"/>
<b>Vita Plan</b>	<p><b>Type:</b> News  <b>Level:</b> All            Plan last modified: 25 Jan 2018 10:38:56  <b>Modules:</b>            Statistics: Yes            Web Pages: 10 pages            Testimonials: Yes            Video: No            Video Streaming: No            Audio: No            Batch Templates: Yes            Exhibits: Yes            Postcards: Yes            Podcasting: No            Ships: No            Allow Page PDF downloads: <input type="radio"/> No <input checked="" type="radio"/> Yes            Require "Human" test for PDF downloads: <input checked="" type="radio"/> No <input type="radio"/> Yes            Google Earth / KML: Yes            Web crawler sitemaps: Yes            Target url: <a href="http://collections.fwio.on.ca/sitemaps/FWIOSitemap_1.xml">http://collections.fwio.on.ca/sitemaps/FWIOSitemap_1.xml</a>            Sitemaps are discussed in webmaster tools at Google. We supply a <a href="#">Sitemap Index</a> and link it from the robots.txt file so Google will find updates automatically. No manual steps are required.</p> <p><b>Note on removing pages from Google:</b> See <a href="#">Google's Webmaster Tools FAQ</a></p>
	<input type="text" value="Update Federated Women's Institutes of Ontario"/>

**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.

The screenshot shows a web interface titled "Personnel" with a breadcrumb "ncies >> Training data set: Personnel". It displays three user entries, each with a contact box on the left and a details box on the right. Each details box includes an "UPDATE" button.

User Name	Contact Information	Details
Primary contact	Jess Posgate <a href="mailto:jposgate@ourdigitalworld.org">jposgate@ourdigitalworld.org</a>	<b>UPDATE</b> 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
Spanish Translation		<b>UPDATE</b> 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
Summer Student	Temp <a href="mailto:student@youragency.com">student@youragency.com</a>	<b>UPDATE</b> Login: sstudent Security Level (Role): 2 (User deletes) Date Added: 17 Sep 2013 13:17:36

## ADD NEW USER

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

The screenshot shows a form titled "Add person" with two input fields and an "Add" button.

**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

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 displays a user disambiguation interface with three existing user entries and an 'Add person' form. Each entry includes a name, a login name, a training data set, and a login count, followed by a red warning message.

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

**Add person**

Name:

Email address:

**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](mailto:gbrown@gmail.com), [georgieboy@hotmail.com](mailto:georgieboy@hotmail.com)

**UPDATE**  
 Login: gbrown  
 Security Level (Role): 1 (User no deletes)  
 Date Added: 11 Oct 2011 15:52:43

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.

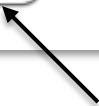
**Security Level:** To change the user's security level, you must login to the agency in question and change their security level for that agency

**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.

### 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.


<b>Full sized image options</b>	<input type="radio"/> Do not process full size (just thumbnail and regular size) There will be no full size
	<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 <b>some number of</b> pixels on its long side.
	<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.


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**  

 Banner displayed in downtown Owen Sound, represents Agnes Macphail as a 'Local Hero: Politician, Feminist, Reformer'.  
**Local Identifier:** DM62

**Agnes Macphail Country Sign**  

 Sign commemorating Agnes Macphail, visible on Hwy 4 as you approach Ceylon from the east. The former residence is located in Ceylon, Ontario, located at Six Corners, west of Ceylon, on 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 1954 alongside her mother, father and sister, Gertha.  
**Local Identifier:** DM5

Thumbnail

**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.]



Regular

Full Image



Full

## DOWNLOAD FILE OPTION

You can turn on or off the option for users to download the Full Size file from your agency record.

<b>Present download option</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
--------------------------------	--

The user will only see this on the Full Image screen



## 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.	
	<b>Thumbnail</b>	150
	<b>Regular</b>	400
	<b>Full</b>	1600
	<b>Reverse</b>	800
	<b>Stereoview</b>	1600
	<b>Detail</b>	1600
	<b>Page</b>	1000

## JPEG2000 CREDIT STATEMENT

Add a credit line and/or branding image for full images. See the Working with JPEG2000 manual for more details and examples.

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## TEXT CREDIT

Use straight text to add a credit statement on the JP2 viewer panel.

<b>JPEG 2000 Image caption/"credit"</b>	From the holdings of the Ottawa Public Library  You can use plain text or include html with or without a fully qualified links to an external url (<a> or to an <img>. The link will appear within the iframe unless followed by a special target "_parent" value as in the following example: "Back to <a href="http://test.ourontario.ca/search" target = "_parent">
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## IMAGE AND/OR LINKED CREDIT

Use HTML to create a linked credit statement or image – you can add an image (make sure image is sized appropriately using proportionate size restrictions e.g. width="100px") and even make that image or text link to a web page. This example has the site logo linked back to the organization site. Note the addition of styling, otherwise the text will be difficult to see on the black background.

<b>JPEG 2000 Image caption/"credit"</b>	<pre>&lt;a href="http://ourdigitalworld.org target="_blank"&gt;&lt;img src="http://vitacollections.ca/glib/ODW_DigitalTree_125_trans.gif" style="width:100px; background-color:white;"/&gt;&lt;/a&gt;</pre> You can use plain text or include html with or without a fully qualified links to an external url (<a> or to an <img>. The link will appear within the iframe unless followed by a special target "_parent" value as in the following example: "Back to <a href="http://test.ourontario.ca/search" target = "_parent">Search </a>"
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## CONTRIBUTED IMAGES: ORIGINALS

If you are inviting User Contributions from the Public, your organization can also opt to store the original upload file. Change that setting here. See the Contribution Module Manual for more details.

Note: Storage of originals can increase your agency storage use.

<b>Contributed images</b>	Store the original Contributed image files? <input checked="" type="radio"/> Yes <input type="radio"/> No <b>Note:</b> This only applies to records that have been submitted to one of your sites via the Contributed module. It is specific to contributed GIFs, TIFFs, and HEIC files, and larger JPGs and PNGs that were converted to JP2s. If the original was smaller and is being served as the "Full" sized image, it won't be stored a second time. Non-image files are always kept to be served (text, audio and video files) even if users can only download them to play or view offline.
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### 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.



The screenshot shows a form titled "Agency Terms of Use". It features a label "Terms of use" next to a large, empty text input field. Below the input field, a small note reads: "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." The label "Copyright statements" is partially visible at the bottom left of the form area.

### 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.

For serial publications with issues or volumes that span public domain and into Copyright, we recommend adding an "Other" statement. See also Newspaper Publication & Issues manual for adding issue and page-level copyright holder information.

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	
<b>Public Domain text</b>	Public domain: Copyright has expired according to Canadian law. No restrictions on use.
<b>Copyrighted text</b>	Protected by copyright: Uses other than research or private study require the permission of the rightsholder(s). Responsibility for obtaining permissions and for any use rests exclusively with the user.
<b>Licensed text</b>	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.
<b>Contractual text</b>	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.
<b>"Other" copyright text</b>	
<b>Default Copyright text</b>	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/](http://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-NonCommercial-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.

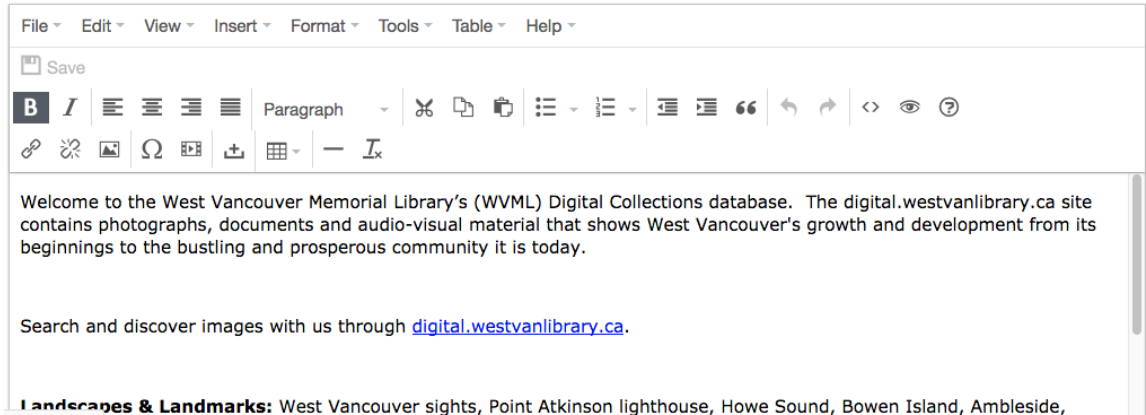
### Test PG 6.0 test: "About" page

Build your "About" page for your agency here.

To **save this page** click the save icon:  Save

**Note:** you might want to edit your text in another application with an active spellcheck. The WYSIWYG editor supplants whatever spellchecking your browser might have provided in this space.

**Note for advanced users:** Expect this content to appear within a table cell on the output page, so certain html values are not legal. Everything within the toolbar here should remain valid. Don't forget that you should validate the resulting page if you want your site to remain valid for purposes of accessibility.



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

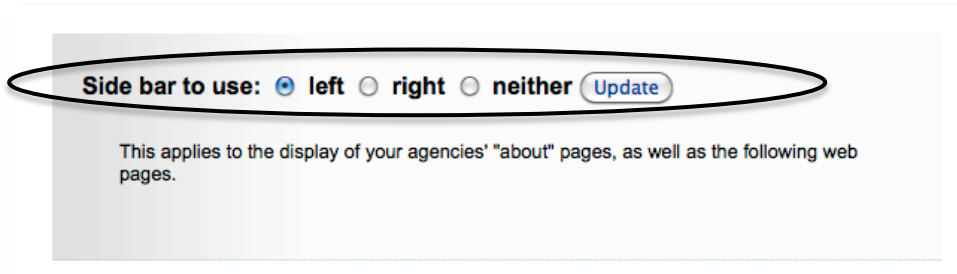
### Test PG 6.0 test

<b>Explore The Collections</b>	Welcome to the West Vancouver Memorial Library's (WVML) Digital Collections database. The digital.westvanlibrary.ca site contains photographs, documents and audio-visual material that shows West Vancouver's growth and development from its beginnings to the bustling and prosperous community it is today.
What's New	
Virtual Exhibits	
Browse by Subject	Search and discover images with us through digital.westvanlibrary.ca.
Browse by Location	<b>Landscapes &amp; Landmarks:</b> West Vancouver sights, Point Atkinson lighthouse, Howe Sound, Bowen Island, Ambleside, Hollyburn, Horseshoe Bay, Marine Drive, Whytecliffe Park, Capilano River and various piers and waterfronts.
Browse by Last Name	<b>Pioneer Families:</b> Portraits, homes and businesses of the Lawsons, Reids, Caulfeilds, Sewells, and others.
Browse by Vessel Name	<b>Community Events &amp; Daily Life:</b> May Day and Community Day parades, golf, swimming, rugby, tennis, lawn bowling, badminton, archery, sailing, hiking and skiing.
Browse by Contributors	<b>Transportation:</b> Boats, ferries, rail, West Vancouver Blue Bus, and the North Shore's iconic bridges.
Advanced Search	<b>Churches, Schools &amp; Public Spaces:</b> Memorial Park, Municipal Hall, post offices, Klee Wyck Art Centre, churches and schools (including class photos).
Research Tips	In addition the library has unique content through the following special collections.
About the Collections	<b>Audio-Visual Items:</b> A new part of the collection that contains a variety of community events, history of the library, sporting events, community television spots, and the Library's Bookmobile.
<b>Contribute</b>	<b>McPhee Collection:</b> Landmarks, homes and businesses in the 1950s, 1970s, and 1980s taken by local photographer William (Bill) McPhee.
Testimonials	<b>British Properties &amp; Park Royal Collection:</b> Plans, land clearing, views, Taylor Way construction and development associated with this major mid-century development project. Many of these photographs were taken by leading commercial/industrial photographers of the time from Leonard Frank Studios.
Upload materials	<b>West Vancouver Memorial Library History Collection:</b> Library building, expansion, and events at the library since its construction in 1950.
<b>Subscribe &amp; Share</b>	
RSS	
Atom	

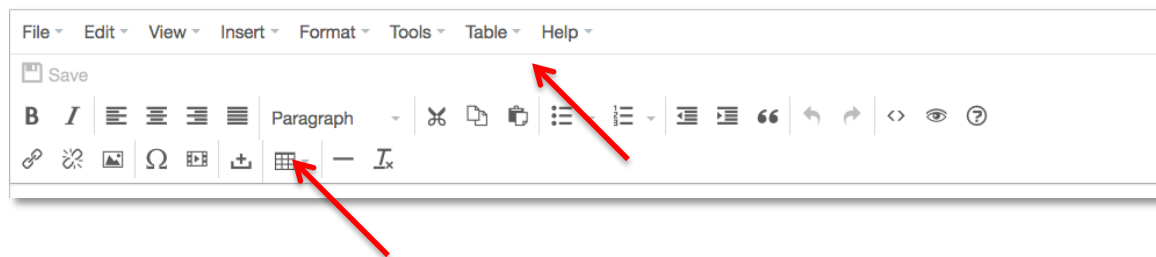
Please note the information on that screen about validating your HTML for accessibility purposes.

**Sidbars 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

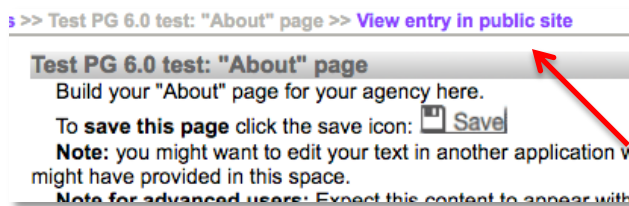
and select which sidebar should appear (see the Site management manual). For information about creating sidebar content, see Site Management "Search page").



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".

## DOWNLOAD YOUR AGENCY RECORD DATA

Download a complete file of all your VITA records by selecting one of the export file options on this page. The records file will be generated in XML (eXtensible Markup Language). If you select a Quick Inventory export, click the hyperlink and "Save as..." CSV

Export	Notes
Type of Export	VITA: <a href="#">All</a> or <a href="#">Just public records</a> <a href="#">Dublin Core</a> : (Just public records) CSV: Quick dump of specific fields: Title, Primary Media type, Vita Record ID, Local identifier, Date Added, Public Display, File Name when uploaded

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](mailto:help@vitatoolkit.ca) and we will provide you with your record export.

“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

## OAI-PMH OPTION

[Open Archives Initiative Protocol for Metadata Harvesting](#) is a powerful tool for creating “handshakes” between systems.

If your agency wants to share their records with a larger aggregator site that “harvests” records on a regular basis, like the Digital Public library of America (DPLA), you can activate the OAI-PMH option [here](#).

The essential components of making the feature available for harvesters are to turn the option “On” and provide a short, keyword-heavy description of the collection content. The agency email will be automatically pulled over from the General Agency settings.

OAI-PMH: Open Archives Initiative Protocol for Metadata Harvesting	
<b>Permit OAI</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Agency email</b>	info@ourdigitalworld.org: The public email at <a href="#">Agency Labels and addresses</a>
<b>Agency Description</b>	<div style="border: 1px solid #ccc; padding: 5px;">           A history of VITA development testing items and records including vessels, scrapbooks, audio and video content and other ephemera.         </div> <p>Description of agency repository: max 30 words          Add a sentence describing the repository -</p> <ul style="list-style-type: none"> <li>• what the harvested records might be about (a history of...)</li> <li>• what types of collections (journals, books, photos, newspapers, etc)</li> </ul> <p>This will be presented as flat text with no formatting or alignment. No &lt;HTML&gt; codes should be entered as this text is not intended to be read in a browser.</p> <input type="button" value="Update"/>

Your records will be output in Dublin Core or MODS format.

For more information about configuring the OAI-PMH, please contact the team at [help@vitatoolkit.ca](mailto:help@vitatoolkit.ca).

## 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

Enter geographic data into any VITA record using standard place names and locator specifications identified using the embedded [GeoNames](#) geographical database or by adding a specific location using Latitudinal and Longitudinal degrees.

In Agency Management, you can set up a geography checklist according to your collection needs 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.

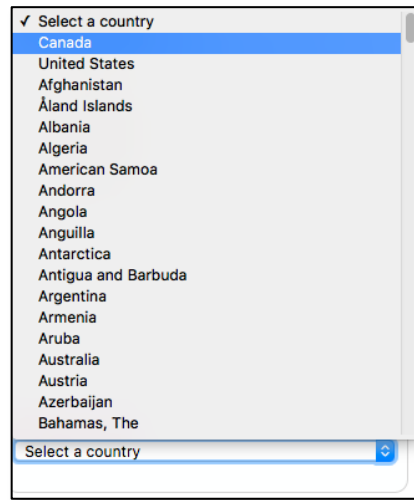
The screenshot shows a search interface with a text input field containing the word "toledo". To the right of the input is a red "X" icon. Below the input is a dropdown menu with several search results. The results are as follows:

Search Result	Coordinates
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, -3.99754

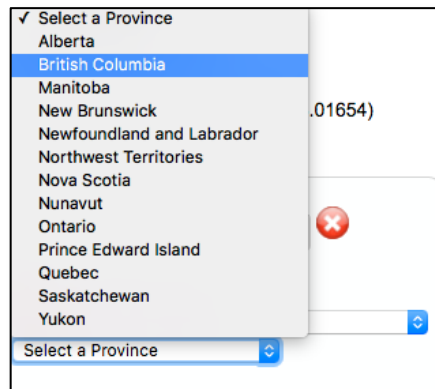
At the bottom left of the interface, there is a small text element: "> Test PG 6.0".



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



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



**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.

Add place  ✖

Enter a minimum of three letters.

**Constraints:**

⌵

⌵

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 (43.95077, -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:**  ✖

⌵ Remove Constraints

**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.

See the Adding and Managing Records manual for specific information about adding places with Latitude and Longitude information.

## 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

Media types				
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](#)

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**Add Record**

Title

Media type  Image  Text  Object  Publication  Genealogical Resource  Newspaper

Category

Label

## ITEM TYPES

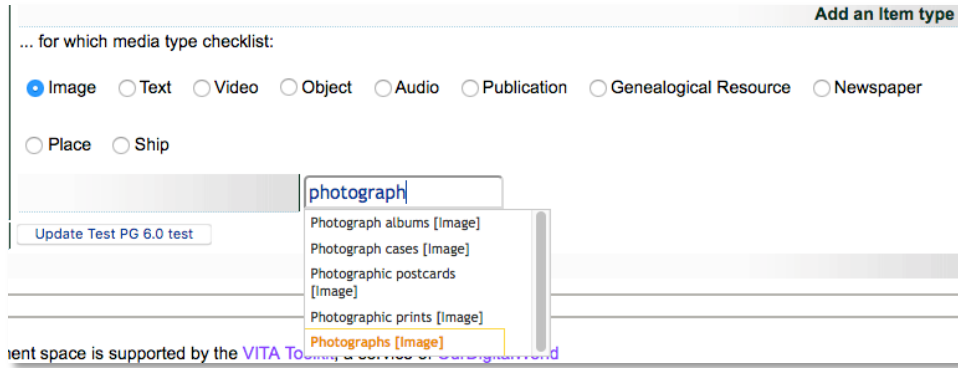
**Predict** the checklist of item types you will be commonly representing in your VITA collection. The item type checklists are assigned according to the primary media type selected for any given record. You should select Item Types for all available media types in your subscription plan.

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.



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 dropdown list.

Item types		Audio
<input checked="" type="checkbox"/>	Audiocassettes	
<input checked="" type="checkbox"/>	Cylinder recordings	
<input checked="" type="checkbox"/>	Phonograph records	
		<b>Genealogical Resource</b>
<input checked="" type="checkbox"/>	Clippings	
		<b>Image</b>
<input checked="" type="checkbox"/>	Drawings	
<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	
		<b>Newspaper</b>
<input checked="" type="checkbox"/>	Clippings	
<input checked="" type="checkbox"/>	Issues	
		<b>Object</b>
<input checked="" type="checkbox"/>	Books	

**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.

The screenshot shows a web interface titled "Additional Creator/Contributor Roles". On the left, there is a greyed-out area and a button labeled "Update Test PG 6.0 test". In the center, a search input box contains the text "author". A dropdown menu is open below the input box, listing several role options: "Author", "Author in quotations or text extracts", "Author of afterword, colophon, etc.", "Author of dialog", "Author of introduction, etc.", and "Author of screenplay, etc.". To the right of the dropdown, there is a text instruction: "Start the search. Keep typing to narrow the search. The 'ID' of the role will appear in the..."

Current checklists		
		<b>Audio</b>
<input checked="" type="checkbox"/>	Recording engineer	
<input checked="" type="checkbox"/>	Singer	
		<b>Image</b>
<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	
		<b>Text</b>
<input checked="" type="checkbox"/>	Author	
<input checked="" type="checkbox"/>	Editor	
		<b>Video</b>
<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

## NEWSPAPER & VOLUME TITLES

For agencies managing full run newspaper collections or other multipage volumes to which you want to add index records (e.g. cemetery records or baptism registers), add a quick list of titles for easy selection when adding new issues or index records. For more information, see the Newspapers, Multipage Text and BMD manuals.

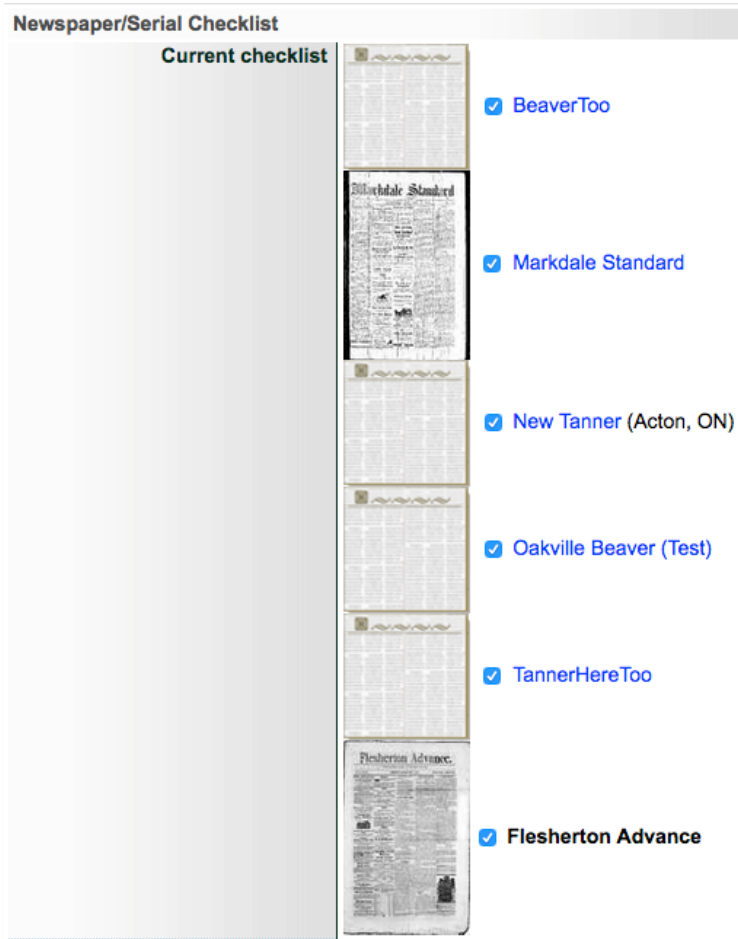
Start typing an existing publication title and choose the correct one from the dropdown menu to add to your checklist

**Additional Newspapers/Serials**

fleshert		
Flesherton Advance		



The title and its thumbnail will automatically display in the checklist screen



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

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**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 type"

**Add BMD Entry**

Publication/Volume Title	
	<input type="radio"/> Acton Tanner
	<input type="radio"/> Barrie Examiner
	<input type="radio"/> Brooklin Times
	<input type="radio"/> Burlington Post
	<input type="radio"/> Canadian Champion
	<input type="radio"/> Canadian Statesman
	<input type="radio"/> Inuit Today
	<input type="radio"/> Markdale Standard
	<input type="radio"/> Merchant And General Advertiser
	<input type="radio"/> Orono Weekly Times
	<input type="radio"/> Upper Canada Herald
	<input type="radio"/> Whitby Chronicle

Enter publication/volume title:

**Note:** For Newspapers, add the Publication title. If the title of the publi  
**a Newspaper in "media type"**.  
For standalone Volumes, like Registers, add that Volume title. If the tit  
**identify it as a Genealogical Resource in "Secondary Media type"**.